

Project Origination:

Item Description (Origination)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Develop Project Proposal:	24		
Formulate business need/problem and anticipated benefits to all parties	24		
Review project's fit with organization's mission	24		
Identify project objectives	28		
Research potential approaches and solutions	28		
Identify and recommend one (or more) chosen solutions	28		
Review solution's fit with organization's strategic plan	28		
Estimate costs of all resources and materials required for the project, both initial and recurring	28		
Identify potential project risks	28		
Identify organizational impacts of the project	28		
Identify any legislative, regulatory or policy dependencies or implications of the project	28		
Perform cost/benefit analysis	28		
Identify project funding strategies	28		
Complete Business Case and Proposed Solution forms (OFT Proposed Project Business Case)	28		
Evaluate Project Proposals:	32		
Submit Project Proposal to the Selection process	32		Project Sponsor submits project to PMO for review.
Schedule and conduct proposal presentation	32		
Identify and/or utilize proposal screening criteria	33		

Project Origination:

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Identify and/or utilize proposal rating criteria and methods	33		
Select Projects:	37		
Identify and/or utilize proposal prioritization criteria	37		
Evaluate projects' requirements vs. organizational capacity	37		
Recommend projects for selection	37		PAC evaluates proposed projects
Choose projects for initiation	38		PMB chooses projects & prioritizes.
Notify Project Sponsor of unfavorable screening outcome	39		
Document decision process and outcome for each proposal	39		
Complete Proposal Decision Notice forms	40		PMO prepares Decision Notices.
Get signatures from Project Selection Committee members	40		
Notify Project Sponsor(s)	41		

Project Initiation:

Item Description (Initiation)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Prepare for the Project	57		
Identify and assign the Project Manager	57		
Identify and appoint the Project Sponsor	57		
Identify project team members	57		
Identify customer representatives	58		
Review historical information	58		
Document how issues were resolved and decisions made	59		
Review Project Charter template	60		
Work with Project Sponsor and Project Team to gain consensus on project expectations	60		
Write the Project Charter document	60		
Schedule time and location of kickoff meeting	60		
Invite appropriate attendees	64		
Prepare meeting presentation and agenda	64		
Designate meeting scribe	64		
Prepare materials for distribution at meeting	64		
Conduct kick-off meeting	64		
Distribute notes to all attendees	64		
Establish project repository	67		
Update the repository with all project correspondence	67		
Define CSSQ:	69		
Write the Project Scope statement	70		
Create preliminary list of roles and skills required	76		
Complete the project schedule worksheet	76		

Project Initiation:

Item Description (Initiation)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Create High-level Schedule	79		
Identify organization's existing standards, if any	79		
Identify and document quality standards for each deliverable – Quality Management Plan	79		
Develop staff and materials acquisition plans	85		
Estimate cost of all resources	86		
Calculate the Preliminary Project Budget Estimate	86		
Perform Risk Identification	90		
Solicit input on risk identification from Project Team, Project Sponsor, and Customer Representatives	90		
Analyze scope, charter, historical information	91		
List all risks identified – Risk List	91		
Develop Initial Project Plan	92		
Identify internal and external stakeholders	92		
Outline Stakeholders' Roles and Responsibilities	92		
Understand stakeholder communication requirements	93		
Write Communications Plan	94		
Compile all documentation and deliverables from Project Initiation	102		
Produce Initial Project Plan	103		
Confirm approval to process to the next phase:	108		
Review and refine the Initial Business Case	108		

Project Initiation:

Item Description (Initiation)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Review all other deliverables from Project Initiation	108		
Obtain buy-in from other managers	108		
Organize deliverables into package	109		
Prepare formal approval form	109		
Present approval package to Project Sponsor for signature	109		
Resolve any issues	109		
Update package as needed to resubmit to Project Sponsor	109		
Get Approval Signature	109		

Project Planning:

Item Description (Planning)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Conduct Planning Phase Kick-off:	132		
Ensure team members have whatever is required to perform their tasks	132		
Meet with each team member to convey roles and responsibilities	132		
Mentor or assign Team Leader to mentor new team members	132		
Distribute copies of all project materials and deliverables to all team members	133		
Hold orientation sessions	133		
Review previous deliverables and components of Initial Project Plan	133		
Schedule time and location of kick-off meeting	134		
Prepare materials for distribution at meeting	134		
Invite appropriate attendees	134		
Prepare meeting presentation and agenda	134		
Designate meeting scribe	134		
Conduct kick-off meeting	134		
Distribute meeting notes to all attendees	134		
Update the project repository with all project correspondence	134		
Refine CSSQ	137		
Refine the Project Scope statement, breaking deliverables into smaller pieces of work	138		
Clearly define each deliverable	138		
Write description of scope change management	139		
Estimate effort and cost for each task and enter into schedule	140		

Project Planning:

Item Description (Planning)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Define dependencies among tasks (Refined Project Schedule)	141		
Review quality standards and revise as necessary (Refined Quality Management Plan)	143		
Initiate/address procurement	144		
Recalculate budget (Project Budget)	145		
Perform Risk Assessment	149		
Review identified risks with Project Team and Project Sponsor	149		
Create Risk Management worksheet	149		
Assess each risk (low/med/high)	153		
Estimate timing of impact on project	153		
Determine mitigation actions (Risk Management Plan)	154		
Incorporate actions in project schedule and project plan	155		
Refine Project Plan	156		
Compile detailed descriptions of all work products and deliverables	156		
Define and document change control process (Change Control Process)	156		
Define and document acceptance management process (Acceptance Management Process)	161		
Define and document issue management and escalation process (Issue Management Process)	163		

Project Planning:

Item Description (Planning)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Refine Communications Plan	164		
Define and document Organizational Change Management Plan	166		
Capture baseline Project Schedule (effort and cost) (Time and Cost Baseline)	172		
Evaluate team member skills and identify training needs	172		
Establish Training Plan	172		
Define and document Implementation and Transition Plan	176		
Add above items to Project Plan	177		
Confirm approval to proceed to next phase	182		
Review Business Case and refine, if necessary	182		
Review all deliverables from Project Planning	183		
Organize deliverable into package	183		
Prepare formal approval form	183		
Present acceptance package to Project Sponsor for signature	183		
Resolve any issues	183		
Update package as needed to resubmit to Project Sponsor for signature	183		
Gain approval to proceed	183		

Project Execution & Control:

Item Description (Execution & Control)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Conduct Execution & Control Kick Off	204		
Ensure team members have whatever is required to perform their tasks	204		
Meet with each team member to convey roles and responsibilities	204		
Distribute copies of all project materials and deliverables to all team members	205		
Mentor or assign Team Leader to mentor new team members	205		
Hold orientation sessions for new members	205		
Review previous deliverables and components of Project Plan	205		
Schedule time and location of kick-off meeting	206		
Prepare materials for distribution at meeting	206		
Invite appropriate attendees	206		
Prepare meeting presentation and agenda	206		
Designate meeting scribe	206		
Conduct kick-off meeting	206		
Distribute meeting notes to all attendees	206		
Update the project repository	206		
Manage CSSQ:	209		
Update and analyze the Project Schedule as needed	211		
Conduct peer review of deliverables, if appropriate	215		
Implement quality checklists	216		
Conduct project audits	217		

Project Execution & Control:

Item Description (Execution & Control)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Manage the budget by monitoring financial performance regularly	222		
Update project repository	222		
Monitor and Control Risks	225		
Review identified risks with Project Team and Project Sponsor	225		
Re-evaluate each risk	226		
Update Risk Management Worksheet regularly	226		
Execute contingency plans or modify them if necessary	226		
Create new contingency plans to accommodate new risks	227		
Update project repository	227		
Manage Project Execution	228		
Execute change control process when necessary	228		
Gain acceptance and approval of all deliverables	231		
Identify and resolve issues, escalating them if necessary	234		
Provide timely communications according to Communications Plan	236		
Prepare Project Status Report regularly	237		
Conduct status meeting with Project Sponsor regularly	238		
Ensure status meetings are being held with the Project Team regularly	239		
Conduct training for support personnel	242		
Conduct training for Consumers	242		

Project Execution & Control:

Item Description (Execution & Control)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Communicate rollout information	242		
Conduct training for Project Team members and update Training Plan	243		
Allocate and assign work to Project Team members	244		
Conduct team building activities	245		
Reward team members	245		
Manage Project Team member changes	246		
Manage changes to Customer's organization	246		
Acquire necessary physical space and equipment to support the product	246		
Transition product into Performing Organization	246		
Update the project repository	246		
Gain Project Acceptance	248		
Prepare final Status Report	249		
Prepare formal Project Approval Form	249		
Conduct final Status Meeting with Project Sponsor and present Project Approval Form	249		
Resolve any issues	249		
Gain final project approval signature from Project Sponsor	249		

Project Closeout:

Item Description (Closeout)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Solicit Feedback:	268		
Prepare surveys	268		
Distribute or review surveys with appropriate participants	269		
Gather survey results	277		
Review and analyze survey results	277		
Summarize feedback for presentation at Project Assessment Meeting	277		
Conduct Project Assessment:	278		
Schedule Project Assessment Meeting	278		
Select and invite appropriate meeting participants	278		
Review and distribute survey summary results	278		
Gather minutes and meeting results for inclusion in Post-Implementation Report	278		
Use survey feedback and meeting results to identify lessons learned and best practices	278		
Document each lesson learned	278		
Document best practices	278		
Develop action plans to implement lessons learned and best practices	278		
Prepare Post-Implementation Report	279		
Gather summarized survey feedback, notes from Project Assessment Meeting, lessons learned and best practices	279		
Present or distribute report to Performing Organization Management	279		
Send copy of report to OFT	279		

Project Closeout:

Item Description (Closeout)	GB r2 Page	Completion Date	Comments (or reasons for NOT completing)
Update Skills Inventory and Provide Performance Feedback:	285		
Establish skills inventory system, if one does not exist	285		
Update skills or add skills to inventory system for each Project Team member	285		
Write performance feedback on each Project Team member	286		
Discuss performance feedback with each Team member	286		
Forward feedback to team member's immediate supervisor	286		
Archive Project Information:	286		
Gather all project information	286		
Archive information in project repository	286		
Locate hardcopy repository in designated documentation area	287		
CELEBRATE! Your project is complete			