

SMART Project Management

Business Process Flow

Project management is a process, not a role. It defines the way to nurture a project from beginning to end. It involves turning a plan into a product, promoting your practice, and having the power to change your policies to make it work. It also contributes to documenting what took place, and allows you to identify obstacles in other projects, as well as how to incorporate successes to achieve more.

The Process

Begin with a project idea...

TRIGGERS CREATE IDEAS

01 PROJECT CONCEPT
Define your idea.
GET APPROVAL TO PREPARE A BUSINESS CASE

02 BUSINESS CASE
Your full business assessment.
PROPOSAL, BENEFIT & RISK ANALYSIS, CONSTRAINTS

03 PROJECT PROPOSAL
Your project's charter.
SUMMARY OF YOUR CONCEPT AND ASSESSMENT

SUBSTANTIATION
Making claims, and identifying core concepts of your project or idea. The substantiation phase ensures that you've assessed the situation correctly, determined a recommended course of action (or multiple courses) and have fully analyzed the potential gain or loss that could be sustained by each solution, including the costs associated with failing to take action.

A PROJECT SHOULD NEVER LEAVE THE SUBSTANTIATION PHASE UNTIL IT'S APPROVED FOR ACTIVATION. EVEN IF YOUR PROJECT DOESN'T NEED APPROVAL, THIS PROCESS WILL HELP YOU ESTABLISH A CHARTER AND SET OF GUIDELINES TO MEASURE YOUR DELIVERABLES AGAINST.

04 PROJECT PLAN
The Master Documents.
HIGH, MID, AND LOW LEVEL PLANS FOR TRACKING

MEDITATION
Reviewing and analyzing the potential future and timeline of your project. High, mid and low-level plans ensure that you have the resources, time and budget available to accomplish your goals. High level projects include corporate-level milestones, mid level project include team or department milestones and goals. Low level plans include granular details about the project, its tasks, and precise timelines.

THE MEDITATION PHASE REQUIRES THE MOST CONCENTRATED THOUGHTS AND EFFORTS

05 OPENING REPORT
Basic introduction for your team.
OVERVIEW OF THE IDEA AND WHAT TO EXPECT

ACTIVATION
This report informs your team that the project can begin. TEAMS & RESOURCES SHOULD BE ALLOCATED TO THE PROJECT AS APPROPRIATE

06 STATUS REPORT
For updating stakeholders.
SWOT ANALYSIS AND SUMMARY FOR MILESTONES

07 REVISION SUMMARY
Assessment of changes.
REFERENCE CHART FOR SCOPE CHANGES

08 ADJUSTMENT PROPOSAL
For scope changes.
SUBMIT FOR APPROVAL TO CHANGES OF SCOPE

REGULATION
The regulation phase requires the most skill in project management, as it involves regularly assessing the current state of the project. The Status Report is for bottom-up reporting, while the Revision Summary is for analysis of changes and issues. If a change requires a scope or budget reassessment, submit a Project Adjustment Proposal for approval. Regulation happens during the entire life of the project, and updates the master project plans.

THE REGULATION PHASE ENSURES THAT ISSUES AND PROBLEMS ARE CAUGHT EARLY, CAUGHT OFTEN, AND REPORTED APPROPRIATELY

09 PROJECT SUMMARY
Closing document.
RESULTS, SUMMARY OF COSTING AND TIMELINE

10 TRIGGER SUMMARY
Assessment of out-of-scope events.
USE TRIGGERS TO CREATE NEW PROJECTS OR IDEAS

TERMINATION
The termination phase is the last phase, and provides a summary report for stakeholders, identifying the outcome of the project. The final report should be reflective of the ongoing status reports throughout the project.

THE TRIGGER SUMMARY IS AN OUT-OF-PROJECT REPORT THAT ALLOWS YOU TO ADDRESS ISSUES AND EVENTS DURING THE PROJECT FOR TRANSFERRAL TO OTHER PROJECTS IF APPROPRIATE

Review and assess your trigger summary report.

- APPROVAL REQUIRED**
- RECURRING ACTIVITY**

Consider using the template "PM Journal" to track all non-task activity after the project plan is created.

For more advanced projects, consider using SMART Template A2, "Resource Allocation List" for tracking and allocating assets, personnel, and environment usage.

For costing and labour intensive projects, consider using SMART Templates T1A, Costing Analysis Report, and T1B, Labour Summary Report, to perform detailed logging of project expenses. If resources must be formally released at project completion, use template T2, Resource Transfer List.

The Project Status Report should be completed by individuals, teams, and the project manager, reporting on each of their respective milestones. The entire regulation phase is continuously repeated for the duration of the project, with project adjustments as necessary.

MANAGING PLANNING IDEA

The Steps

123 One at a time... 123

SCULPTING
The Project Concept template helps you to build out your concept and business case, define goals, and identify benefits and risks to your project.

SHAPING
The Business Case and executive summary help you define the goals, benefits and risks from a business perspective, to finalize the project proposal.

SUBMITTING
Your Project Proposal is all you need to submit your project for approval.

THESE THREE PHASES INVOLVE A SIGNIFICANT AMOUNT OF BRAINSTORMING AND CONCEPTUAL WORK. FOR EFFECTIVE BRAINSTORMING AND ORGANIZATION, USE THE I.D.E.A.L. MEETING FORMAT FOR STRUCTURING YOUR COLLABORATION AND PLANNING SESSIONS APPROPRIATELY AND QUICKLY.

IDEAL

MEASURING
Your high level plan should identify accurate estimates of key stages (milestones), top risks, major constraints and standards, and rough timeline estimates.

MARKING
Your mid level plan should set reasonable estimates for team-oriented tasks, goals, milestones, resources and estimated budget allowances for each team.

MANDATING
Your low level plan can often be delegated to team leads, who define individual tasks and assemble the teams.

PROJECT MANAGEMENT SOFTWARE IS IMPORTANT HERE, ESPECIALLY IF IT HAS THE ABILITY TO GROUP AND SUMMARIZE DETAILED TASKS. HIGH LEVEL PLANS CAN BE DRILLED DOWN TO MID LEVEL AND LOW LEVEL TASKS. REPORTING ON EACH LEVEL CAN ENSURE THAT RECEIPIENTS OF REPORTS DON'T GET OVERLOADED WITH INFORMATION THEY DON'T NEED, BUT THE INFORMATION IS AVAILABLE IF IT'S NEEDED.

ADVERTISING, APPOINTING AND ADVISING
As an all-in-one step, your Opening Report should advertise the project's launch, formally appoint the responsibilities of team leads, and set any key areas of advice and recommendations before launch.

RUNNING
Once the project is in full operations, most of the team leads should be responsible for running its daily operations. For some projects, the PM may conduct daily checkup meetings.

REVIEWING
Project revisions are critical, as they represent not only changes to the accuracy of estimates, but also may indicate potential scope changes. PMs review the project daily.

REVISING
If necessary, revise your project at regular intervals to ensure that you can catch a scope change when needed.

A GOOD PROJECT MANAGEMENT JOURNAL CAN HELP TO TRACK THE EVENTS AND TRIGGERS THAT TAKE PLACE DURING THE SCOPE OF A PROJECT. IT DOESN'T NEED TO BE COMPLEX: A SIMPLE SPREADSHEET WILL DO. SIMPLY TRACK THE TIME AND DATE OF THE EVENT, A SUMMARY OF THE ISSUE, AND THE TYPE OF EVENT (SCOPE CHANGE, RESOURCE PROBLEM, BUDGET CHANGE, IDEA, ETC.) USE THESE TYPES TO SORT THE DATA FOR SUMMARIES LATER.

TABULATING AND TRANSFERRING
Your closing document should contain a summary of results, including any necessary completion reports and a baseline comparison. It may also include a resource transfer list.

TRIGGERING
Triggers identify any issues or events causing scope changes, or that suggest additional future projects.

TRIGGERS CAN HELP PUT LIFE INTO NEW PROJECTS. REMEMBER THAT A SCOPE CHANGE DOES NOT ALWAYS NEED TO BE DONE WITHIN THE PROJECT. SOMETIMES, A SCOPE CHANGE MAY SIMPLY BE IDENTIFIED AS A NEW PROJECT, TO BE DEVELOPED AT A FUTURE TIME.

! Don't lose the "not applicable" items. They may be valid for other projects.

I IDEAS	D DIVIDE	E EVALUATE	A ADJUST	L LAUNCH
CAPTURE CONCEPTS ONLY. DON'T CATER TO NEGATIVES (DON'T FEED TROLLS). CAPTURE EVERY IDEA, WORRY ABOUT SORTING LATER.	DIVIDE & GROUP IDEAS ACCORDING TO THE PROJECT GOAL AS ABCD: A=MUST DO, B=SHOULD DO, C=DO IF TIME PERMITS, D=NOT APPLICABLE.	EVALUATE IDEAS AND ASSESS THEIR RISKS. IDENTIFY ANY SHOWSTOPPERS OR CRITICAL PATH INDICATORS THAT COULD BE ISSUES.	ADJUST THE IDEAS BY RETURNING TO THE IDEA PHASE TO IDENTIFY ANY POSSIBLE SOLUTIONS TO SHOWSTOPPERS. REPEAT I, D, E & A.	ONCE ALL SHOWSTOPPERS AND INDICATORS HAVE A SOLUTION, BY REPEATING THE FIRST FOUR STEPS, LAUNCH INTO YOUR PLANNING.