

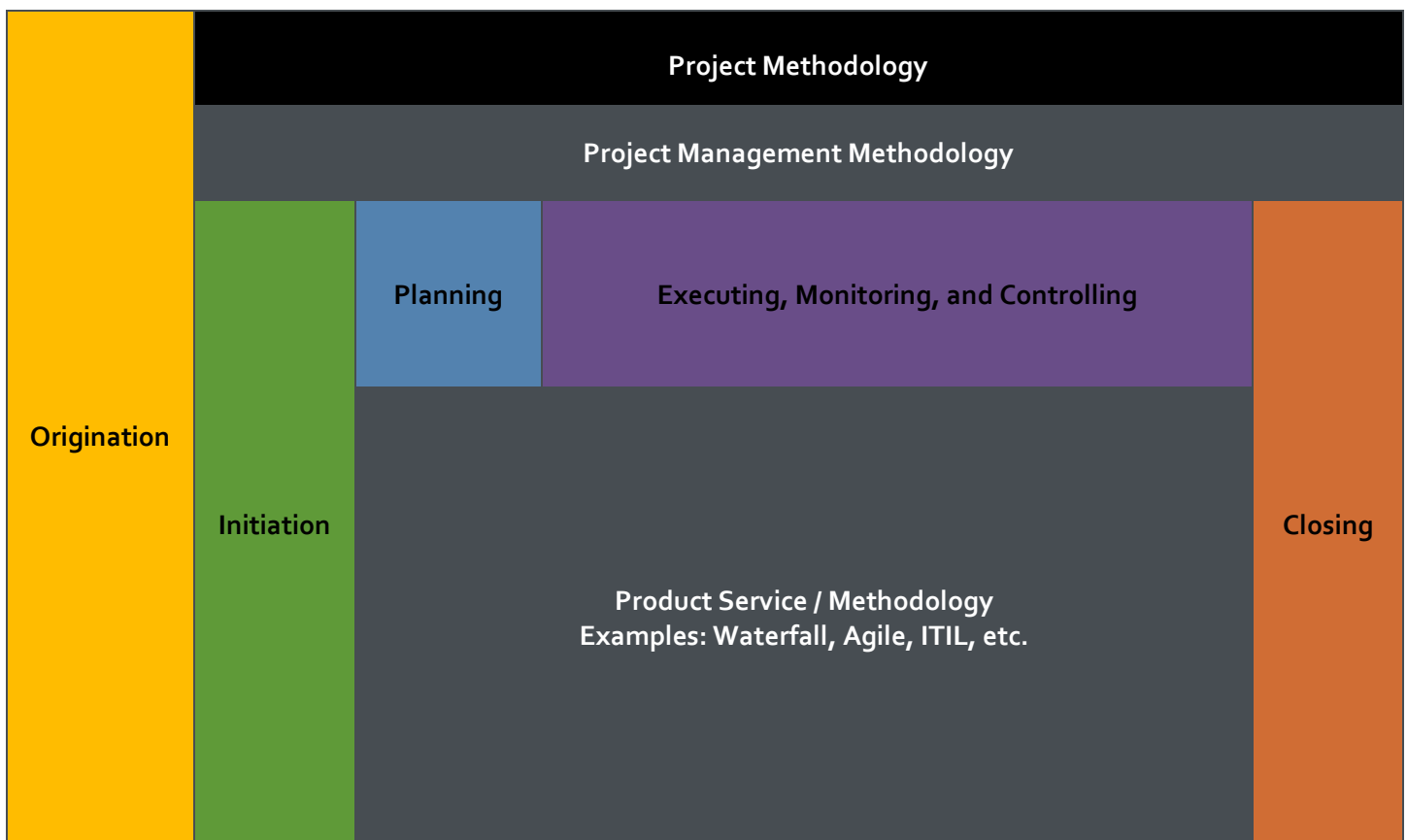
INFORMATION TECHNOLOGY PROJECT MANAGEMENT LIFECYCLE

Overview

This document outlines a shared project management methodology for Racine County. A consistent project management methodology, developed, endorsed, and used by RC will improve predictability, understanding, and outcomes of our project initiatives.

The project management methodology outlined is based on the Project Management Institute's approved standards that are accepted and utilized widely by the project management community in both business and education. The goal of establishing this methodology is to provide a repeatable approach to project management that improves project predictability, communications and overall performance for project team members and stakeholders of our projects.

This methodology provides a minimal framework to assist project managers, as well as managers functioning as project managers, in the planning and execution of projects. In addition to the project management methodology, supporting product development processes are required for the project management processes to be highly effective. While product development processes are an essential and integrated part of successful project execution, this document does not address the product development processes.



INITIATION

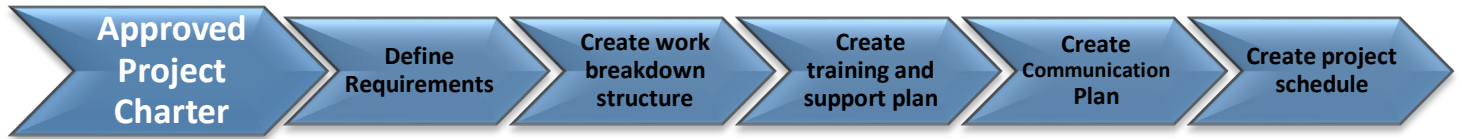
The goal of the Initiation Phase is to formalize and understand project goals and deliverables, identify project stakeholders, and establish roles and responsibilities.



Activity	Description	Inputs	Outputs	Owner	Resources
Set up project	The Project Manager establishes the tools needed to manage the project. This includes a collaboration space for storing project documents and templates that allow for creating project management artifacts.	Project management templates	Collaboration space	Project Manager	PMO SharePoint Online Site Collection or Division/Department SharePoint Online Site Collection
Gather information	The Project Sponsor and primary team members confirm understanding of project scope, identify skills needed, identify impacts, define measures of success, and identify risks.	Sponsor	Data for the project charter	Project Manager and Project Sponsor	
Draft charter	Identify team members with functional managers. Ensure team members understanding of the project outcomes, scope, and roles and responsibilities by defining key elements and drafting the project charter.	Sponsor, Functional Managers, Lead Team Members	Draft project charter	Project Manager and Project Sponsor	Project charter template Project organization structure template
Approve charter	The drafted project charter is reviewed, revised, and edited by primary team members and receives final approval from the project sponsor.	Draft project charter	Approved project charter	Project Manager and Project Sponsor	
Create risk, issue and decision logs	Establish risk, issue and decision logs based on items identified in the approved project charter.	Project charter	Risk, issue and decision logs	Project Manager	SharePoint Risk, Issue and Decision lists or templates
Hold kick-off meeting	Familiarize the project team with the project and collaboration space, review the project charter, and establish meeting frequency and internal communication methods.	Project charter		Project Manager	

PLANNING

The goal of the Planning Phase is to define the work that is to be done, how the work will be accomplished, and who will be performing the work and when. This phase is critical to a project's success by establishing clear direction and understanding of team member's contributions. Depending on the product/service development processes this phase can be iterative with executing, monitoring and controlling until the project schedule is progressively elaborated and all relevant areas of the chartered project have been addressed.



Activity	Description	Inputs	Outputs	Owner	Resources
Define solution and transition requirements	Identify the solution and transition requirements to complete the identified project goals.	Project charter Information gathering activities	Requirements specification	Business Analyst or Technical Lead	Requirements specification template Technical design template
Create work breakdown structure	Identify the high-level activities that must be accomplished to complete the work of the project.	Project charter Requirements specification	Work breakdown structure diagram	Project Manager	Work breakdown structure template
Create training and support plan	Identify the strategies to prepare stakeholders for the impact of the project.	Project charter Stakeholder analysis Requirements specification	Training and support plan	Project Manager Or Training and Outreach Manager	Training and support plan template (in progress)
Create communication analysis, plan and log	Identify stakeholders, their impact, communication goals, and how we will communicate that impact to them.	Project charter Stakeholder analysis Training and support plan	Communication analysis, plan and log	Project Manager Or Communications Manager	Communication analysis, plan and communication log template or SharePoint Communication log list (in progress)
Create project schedule	Develop a roadmap for execution process. This		Project schedule	Project Manager	MS or SharePoint

	include the tasks, effort, individual responsible, current status, and schedule (start date and completion date). Create a living document that will be consulted and modified throughout the life of the project.	Work breakdown structure diagram			Project or Project schedule template
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EXECUTING, MONITORING, AND CONTROLLING

The goal of the Executing, Monitoring and Controlling Phase is to manage and complete the work required to meet the project's objectives. This phase also ensures the project performance is being monitored and adjustments to the project schedule are made as needed.



Activity	Description	Inputs	Outputs	Owner	Resources
Execute project schedule	Obtain status updates on project tasks to ensure the project schedule is up-to-date.	Task status Issues Decisions	Updated project schedule	Project Manager	
Execute user adoption plans	Create and execute training, support, and communication methods previously identified. Perform as necessary throughout the project.	Project training and support plan Project communication plan	Updated project communication log	Project Manager or Training/Communication Manager	
Manage risks and issues	Monitor identified risks and develop contingency plans in case of escalation. Log issues identified during the execution (status and individual responsible) for resolution.	Project charter	Updated risk log Updated issue log	Project Manager	
Manage and track decisions	Record key decisions made over the course of the project for reference. This includes the decision, groups consulted, outcome and date decision made.	Discussion from project team and sponsors	Updated decision log	Project Manager	
Conduct customer satisfaction survey	Survey customers after project implementation to gauge satisfaction with the project management.	Project charter Communication plan	Project management survey	Project Manager	Customer satisfaction survey template

CLOSING

The goal of the Closing Phase is to confirm the successful completion of project deliverables, gather lessons learned, transition the service to operations and close and communicate the project status to participants and stakeholders.



Activity	Description	Inputs	Outputs	Owner	Resources
Gather lessons learned	Meet and discuss with project team members the successes and problems encountered during the project.	Notes, project documents	Lessons learned	Project Manager	
Identify ownership for open items	Identify any outstanding items or issues and assign ownership for responsibility.	List of items to be transitioned	Transfer of ownership	Project Manager	
Transition to operations	Coordinate with Service Owner on handoff process appropriate for the product or services to be transitioned.	Product or service documentation	Updated or new service description	Project Manager and Service Owner	Service Catalog or Service description template
Hold project closing meeting	Review customer satisfaction, lessons learned and ownership of open items with the project sponsor and teams.	Customer satisfaction notes Lessons learned Outstanding items	Close report	Project Manager	Close out report template
Celebrate	Celebrate the successful completion of the project with team members!			Project Manager	
Archive project artifacts	Organize and archive project artifacts.	Project artifacts	Project archive	Project Manager	

Revision History

Updated By	Updated On	Reasons for the Change
Shuchi Wadhwa	6/10/2019	Document creation