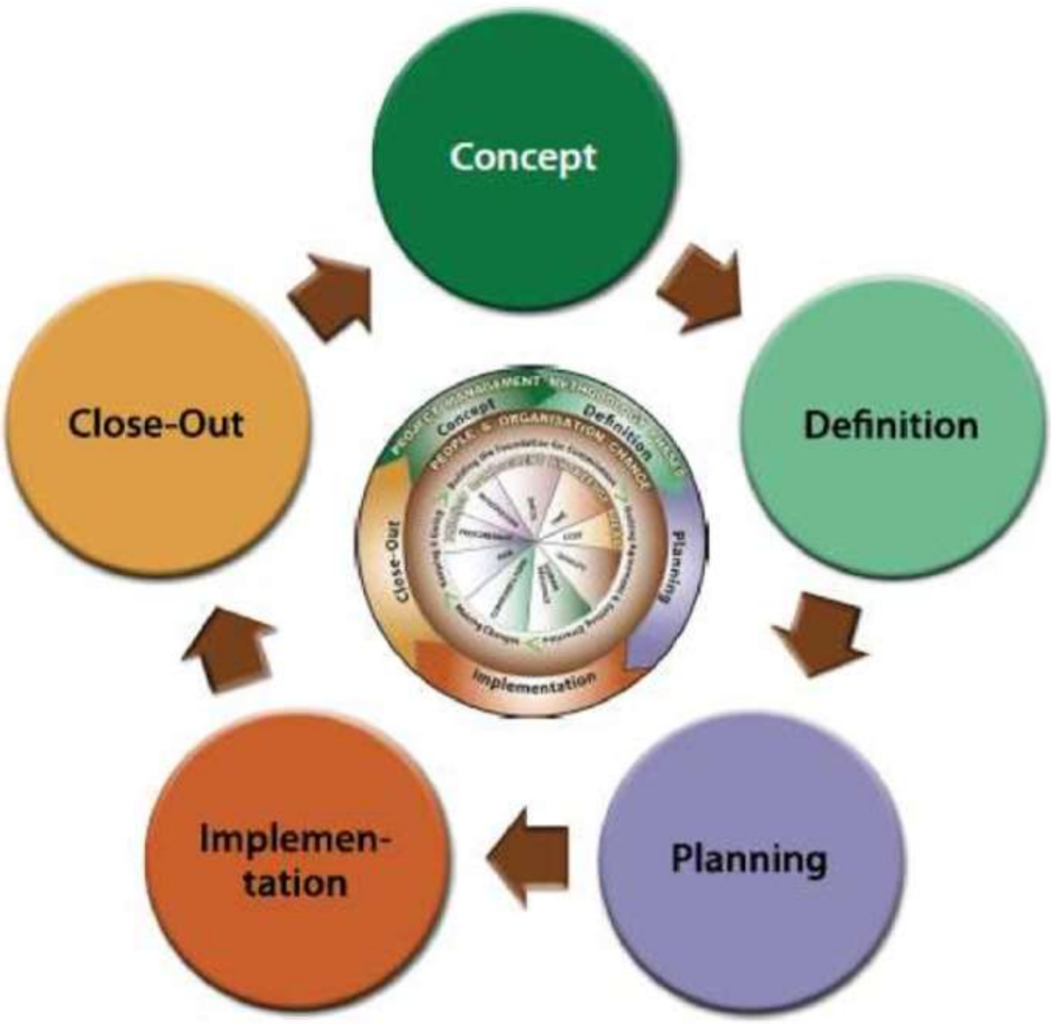

PPM **programme & project** management

Guide to Smaller Projects

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Table of Contents

Acronyms and Abbreviations

AC	Actual Cost
ACWP	Actual Cost of Work Performed
AD	Activity Description
ADM	Arrow Diagramming Method
AF	Actual Finish date
AOA	Activity-on-Arrow
AON	Activity-on-Node
AS	Actual Start date
BAC	Budget at Completion
BCWP	Budgeted Cost of Work Performed
BCWS	Budgeted Cost of Work Scheduled
BOM	Bill of Materials
CA	Control Account
CAP	Control Account Plan
CCB	Change Control Board
CoQ	Cost of Quality
CPFF	Cost-Plus-Fixed-Fee
CPI	Cost Performance Index
CPIF	Cost-Plus-incentive-Fee
CPM	Critical Path Method
CSF	Critical Success Factor
CV	Cost Variance
DD	Data Date
dplg	Department of Provincial and Local Government
DPSA	Department of Public Service and Administration
DU	Duration
EAC	Estimate at Completion
EF	Early Finish date
ES	Early Start date
ETC	Estimate to Complete
EV	Earned Value
EVM	Earned Value Management
FF	Free Float or Finish-to-Finish
FFP	Firm Fixed-Price
FFS	Fees for Services
FPIF	Fixed Price Incentive Fee
FS	Finish-to-Start
FTE	Full Time Equivalent
GERT	Graphical Evaluation and Review Technique
HR	Human Resources
IFB	Invitation for Bid
ISO	International Organisation for Standardisation
IT	Information Technology
LF	Late Finish date
LOE	Level of Effort
LS	Late Start date
NT	National Treasury
OBS	Organisation(al) Breakdown Structure
PALAMA	Public Administration Leadership and Management Academy
PC	Percent Complete
PDLC	Product Development Life Cycle
PDM	Precedence Diagramming Method
PERT	Program Evaluation and Review Technique

PF	Planned Finish date
PM	Project Management or Project Manager
PMBOK	PMBOK@ Project Management Body of Knowledge
PMI®	Project Management Institute
PMO	Programme / Project Management Office
PMP®	Project Management Professional
POC	People and Organisation Framework
PPM	Programme and Project Management
PS	Planned Start date
PV	Planned Value
QA	Quality Assurance
QC	Quality Control
RAM	Responsibility Assignment Matrix
RASCI	Responsibility, Approves, Supports, Consulted, Informed
RBM	Results Based Management
RBS	Risk Breakdown Structure
RDU	Remaining Duration
RFEOI	Request for Expression of Interest
RFI	Request for Information
RFP	Request for Proposal
RFQ	Request for Quotation
RFR	Request for Resources
RFS	Request for Services
RFT	Request for Tender
RSA	Republic of South Africa
SF	Scheduled Finish date or Start-to-Finish
SMART	Specific, Measurable, Achievable, Relevant, Time bound
SME	Subject Matter Experts
SOW	Scope / Statement of Work
SPI	Schedule Performance Index
SS	Scheduled Start date or Start-to-Start
SV	Schedule Variance
T&M	Time and Materials
GTAC	Government Technical Advisory Centre
TC	Target Completion date
TF	Total Float or Target Finish date
TOR	Terms of Reference
TQM	Total Quality Management
TS	Target Start date
VE	Value Engineering
WBS	Work Breakdown Structure

1 Introduction

1.1 Why Project Management Processes and Tools?

Essentially because the world has become a lot more complicated! On top of “regular” work, people are expected to work on projects which are new and loaded with risks and problems, often with people they have not worked closely with before. The best result is high stress. The worst result is failure.

As these changes and levels of stress have increased over the years, it has become apparent that some way of regulating and managing them has become an absolute necessity. That is why processes and tools are needed. Following a process and using the tools will never result in a perfect project (they don’t exist) but it will result in the following:

- Stress levels will drop because the processes will support the individuals working on the projects; Satisfaction levels will rise as people understand better the complexity of projects and how best to deal with them;
- The time and money spent on projects will be reduced, as the number of errors drops dramatically; Citizens and other stakeholders will become happier as you deliver what they want, when they want it.

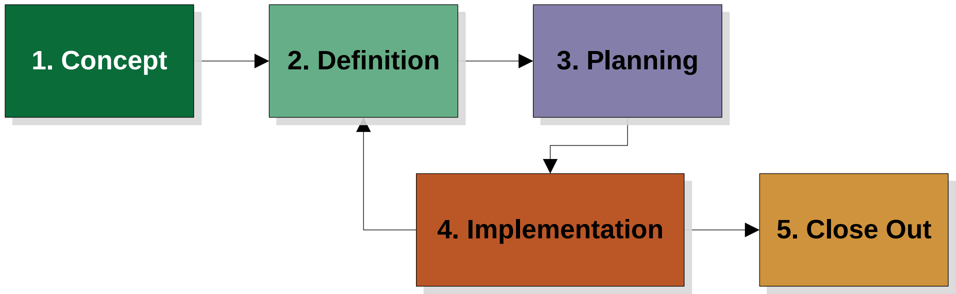
1.2 Scope and Purpose of this Document

This document, the **Guide to Smaller Projects,** is intended as a learning tool and guide for those interested in become better at working with small projects (e.g. team members, project managers, sponsors) and offer a clear illustration of roles and responsibilities when applying the **Programme and Project Management Framework**[1] (PPM Framework) to lead and influence the success of Pubic Service projects.. It provides actual tools and templates which the project team can use to improve their work environment and get better results, immediately.

1.3 The Project Life Cycle and Phases

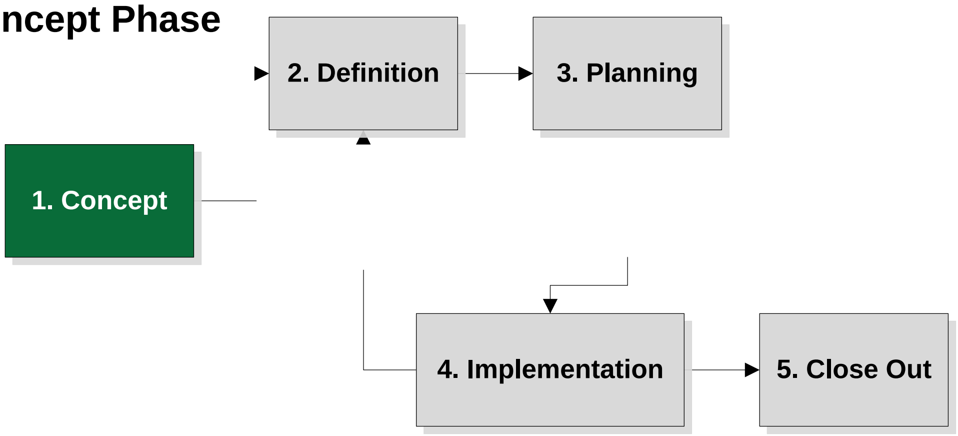
Projects are broken into phases for a number of reasons. Firstly, each phase allows the team to stop, see what is happening and either make changes or stop the project. Secondly, each phase better clarifies the project so that by the time you actually do the project (implementation) you have a very clear idea of what is expected.

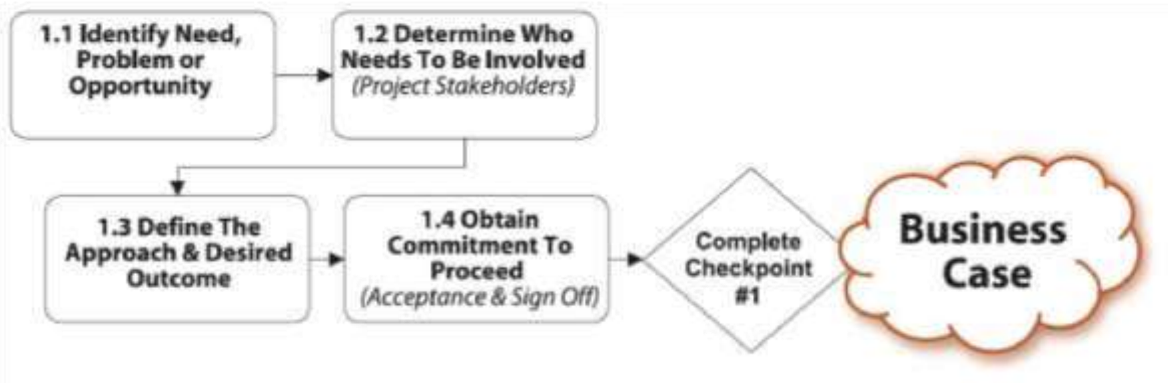
[1] Refer to the PPM website for the most recent version of the Programme and Project Management Framework (FWK_1)



Phases	Key Deliverables	What Happens?
Concept	Business Case	Determine the need, problem or opportunity to be addressed and get approval to begin the process. This is a high-level view of the project.
Definition	Project Charter	Define what the project is to accomplish (clear outcomes, outputs and performance targets), what it will produce (scope) and who should be involved (stakeholders).
Planning	Project Plan Project Schedule	Create a plan for what tasks need to be completed and when, what resources will be used, how it will deal with risks and who should be communicated with.
Implementation	Kick Off Meeting Change Requests Progress Reports Project Deliverables	Kick the project off and get going. Do what you planned to do, make adjustments as necessary, monitor results and report progress to stakeholders.
Close-Out	Sign Offs / Approval Lessons Learnt Project Archives	Deliver the end product to the customer, get their approval, review results and make improvements for the future.

2 Concept Phase





The purpose of the Concept Phase (phase 1) is to determine that a project is needed and to get approval to proceed. This is a very high-level view of the project - from the customer - on what they see as the problem and how they might like to have it solved. This is done through the **Business Case**, which is a document that outlines the need, proposes some options, makes a recommendation and provides formal approval to move forward with the chosen option.

In general, the recipient of the project outputs / deliverable is the client and will provide authorisation and pay for project. The *Project Sponsor* is the person that authorises the existence of the project, has singular accountability for the project and authorises the costs. For smaller, internal projects, the Project Sponsor and the client can be the same individual.

2.1 Major Steps & Tools

2.1.1 Identify Need, Problem or Opportunity

This is a brief summary of what prompted the idea for the project in the first place. What is the specific need (e.g. new mandate to be followed), problem (e.g. rising costs) or opportunity (e.g. chance to improve services) that the client wants to address? Unless this is clearly identified and understood at the outset, it becomes very difficult to "solve" the issue later on. It is especially useful if specific examples or numbers can be provided (e.g. 10% decrease in Housing backlog).

2.1.2 Determine Who Needs To Be Involved (Project Stakeholders)

Project *Stakeholders* are people who will work with you on the project (e.g. partners, other departments), provide support (e.g. Sponsor), or need to be involved or consulted to ensure success (e.g. staff or clients who will use the new system). By clarifying this list of people at the start and understanding their needs, a project team can ensure that future problems or issues are avoided.

2.1.3 Define the Approach & Desired Outcome

The Project Sponsor may have one or more ideas (***options***) as to how the issue might be addressed and may make a recommendation based on these. Although this provides direction and understanding***, it should not be seen as the final solution***. It should be seen as a proposal or possible response. In many cases a better solution will present itself once the project team gets to analyse the issue further, during the Definition and Planning Phases.

Alongside the options, some ***high-level resource, cost and duration estimates (+/-50%)*** provide a broad understanding of what might be involved in the project. These are rough estimates that help to build the "case" for going forward.

In addition to outlining the options and estimating resources, a business case considers the options and makes a recommendation for going forward. A clear recommendation should be made in order to obtain agreement on how to proceed.

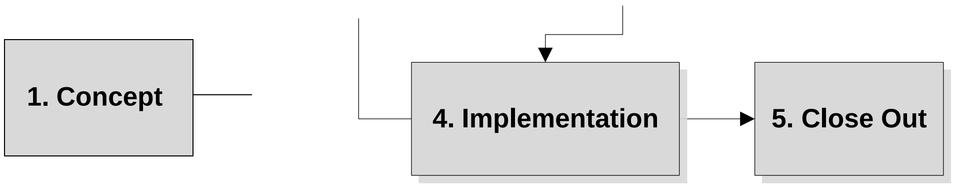
2.1.4 Obtain Commitment to Proceed (Acceptance & Sign Off)

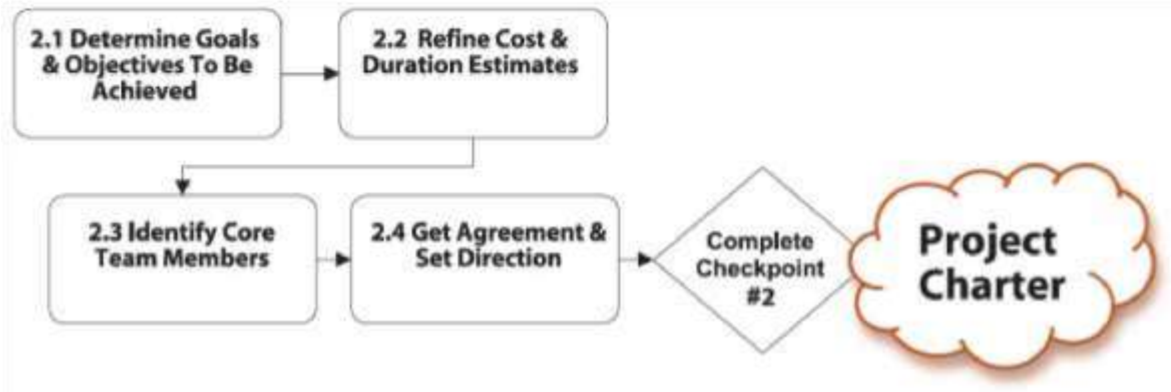
Signatures here verify that the problem has been clearly identified and that a formal decision has been made to start the project and to proceed with the chosen option.

Complete Checkpoint #1 – Signed-Off Business Case

- *Does everyone understand and agree on the need, problem or opportunity?*
- *Are Project Stakeholders identified?*
- *Do you know who you will be working with and who needs to be considered?*
- *Does the chosen option make sense and does it address the issue?*
- *Are the correct people signing the business case?*
- *Is the Sponsor clearly identified?*

3 Definition Phase





The purpose of the Definition Phase (phase 2) is to further refine what the project is to accomplish at the end, i.e. state clear outputs, outcomes and performance targets, establish who the key stakeholders are and identify their needs, and understand any major risks or assumptions. This is done through a **Project Charter**, which is a document that formalises common agreement on all main aspects of a project and forms the basis for future planned activities. The Project Charter is signed off by the Project Sponsor and the ***Project Manager***, who is the individual responsible for defining, planning, implementing, monitoring, controlling, and closing the project.

3.1 Major Steps & Tools

3.1.1 Determine Outcomes & Outputs to be Achieved

There is no harder task to accomplish in project management than detailing what the project must accomplish in a **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime-Bound (***SMART***) way. By ensuring that you have a measurable target to reach (e.g. 8% decrease in service waiting times), all future project decisions and changes will continue to focus on the real reason for the project. In many cases, various analytical tools may be needed (e.g. cost benefit analysis, market or citizen surveys) to better define the measures. The project team can do this prior to the charter, or build this into an early step in the implementation phase.

The ***scope*** or ***outputs*** of the project are the actual products (e.g. new software system, training manual) or project management documents (e.g. plan, schedule) that will be given to the Sponsor. It is very useful at this stage to clarify exactly what the project will be delivering (***In Scope***) and what it will not (***Out of Scope***). This decreases the chance of ***scope creep*** ("extras" being requested and added to original scope) during the project and increases the chance of success.

3.1.2 Refine Cost & Duration Estimates

By defining the scope and deliverables in the earlier step, the project team will now be able to further refine the expected costs and duration of the project ***(to +/-25% accuracy***). This will be done through a high level list of all the major deliverables, when they are expected to start and finish, and how much each might cost. This list will be further refined to include all tasks just prior to developing the schedule (undertaken in the next phase).

3.1.3 Identify Core Team Members

A skilled, committed, project team is at the core of all successful projects. In many cases you will not know the exact person for the job, but you should be able to outline the general role and the skills that will be needed. There are a number of tools available to do this, including ***talking to and getting advice from the key partners*** identified in the business case. ***Effort*** is the amount of actual time they will work on project tasks (e.g. 10 days, off and on, to write a manual) while ***duration*** is the period over which they will do that work (e.g. 4 weeks). This allows the team member and manager to prepare their own schedules.

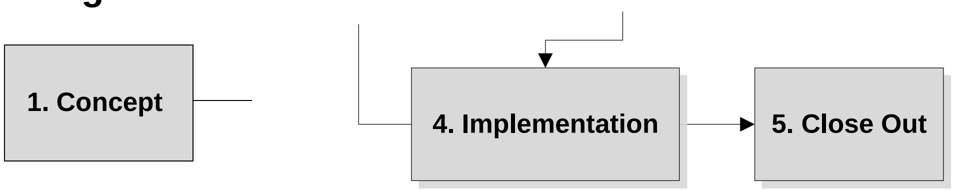
3.1.4 Get Agreement & Set Direction

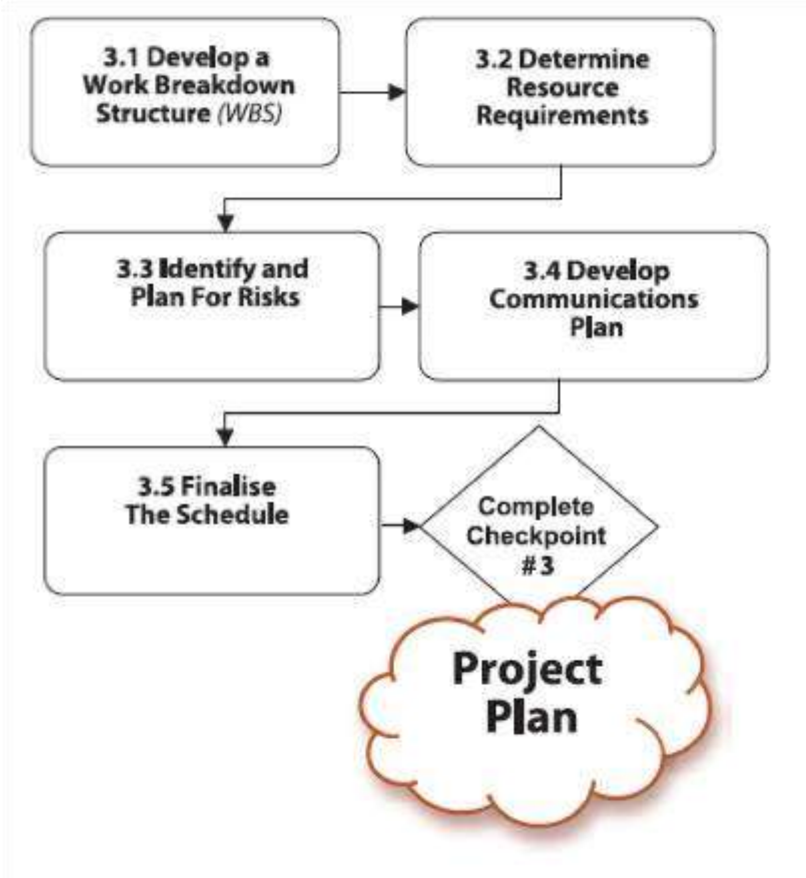
Ensure that, when signing, the Project Sponsor and Project Manager truly understand the project and where it is going.

Complete Checkpoint #2 – Signed-Off Project Charter

- *Does everyone agree on what the project should ultimately accomplish (e.g. measurable outputs and outcomes)?*
- *Are the major deliverables and tasks identified?*
- *Have all sides agreed on the list of scope items that will not be delivered?*
- *Can the team perform all the work identified?*
- *Are all the necessary roles identified?*

4 Planning Phase





At this point in the process the Project Sponsor and the project team (lead by the Project Manager) have agreed that the project makes sense and have specific outcomes and target measures. The Planning Phase (phase 3) is now used to define how the project will accomplish its aims, what resources will be used (e.g. money, people), when it will be completed, how to monitor and control changes, etc.

This is done through the completion of a **Project Plan**, which is a document created by the team that includes a more detailed idea of what work will be done (***tasks***), who will actually do it (***resources***), when it will be finished (***schedule***), who should be aware of what is going on (***communications***) and what major problems or issues should be considered (***risks***). At the end of this process the team should know a great deal about the project and be ready to implement.

4.1 Major Steps & Tools

4.1.1 Develop a Work Breakdown Structure (WBS)

A **Work Breakdown Structure (WBS)** is a deliverables-based grouping of project components used to represent the entire scope of the project in a detailed, clear manner. Each descending WBS level represents an increasingly detailed description of project deliverables. All work (***Deliverables, Tasks***) that is within the scope of the project will be part of the WBS. Software such as Microsoft Projects is available for more complex WBS's.

4.1.2 Determine Resource Requirements

The core project team's roles and responsibilities were identified earlier (Project Charter) and now with in-depth detail of the entire scope of work established (WBS), a complete list of resources (human and material) should be developed.

Project team resources are the actual people who will be completing the work on the project. A high-level overview of roles and responsibilities is needed to ensure that everyone knows what they're doing. Specific tasks will not be identified and attributed to people during the definition of roles and responsibilities. Specific tasks will be assigned later, during the creation of the schedule.

Other resources can include outside consultants, hardware or software that must be purchased, equipment, etc.

4.1.3 Identify and Plan for Risks

When the Business Case and Project Charter were developed, they were based on various ***assumptions*** which may or may not be true. In addition, since all projects are new, there will be a number of things which could or will go wrong (***risks***). By identifying most of these risks and assumptions in advance, the project team can evaluate them and develop plans for dealing with them. This can ***dramatically reduce problems*** as well as provide an overall structure for how the project might be planned and better implemented (e.g. evaluation steps put in at the start of implementation to see if certain assumptions are true before proceeding).

Some hints at identifying and planning for risks include:

- Be very ***specific*** about the risk (e.g. software vendor not delivering the module on time) and write it down clearly. If it is too vague (e.g. vendor), it will be very hard to actually analyse and plan for it;
- Get the ***team involved*** throughout the process, as their input is critical;
- Create ***realistic plans*** that respond to the risk by reducing the chances of it happening (e.g. verify whether the vendor has their own plan), reducing its possible impact (e.g. have a backup vendor), or avoiding the risk altogether (e.g. produce the product in-house).

4.1.4 Develop a Communications Plan

A well-developed **communications plan** includes all the information flows (e.g. meetings, emails, reports, etc.) that will be required to keep people in the loop and contributing to the project. By completing and implementing the communications plan, the team achieves the following:

- Reduces the number of ad-hoc information requests and therefore work;
- Ensures a higher level of commitment to the project from all stakeholders;
- Improves project decisions and quality, as people will now have the exact information they need and can act accordingly.

4.1.5 Finalise the Schedule

Once you have a list of all project deliverables (from the WBS created earlier in the phase), you can now create a timeline (**Schedule *or Gantt chart***) for when these will be produced. A common method of doing this is to:

- Break down the work of the project into smaller tasks for each major deliverable,;
- Put all the tasks in order, from start to finish. Tasks that can be done at the same time can simply be put under each other;
- Estimate how long each task will take, given people's current workload and other projects and priorities happening in the organisation;
- Insert a number of ***milestones*** (e.g. important dates, deliverables completed, phases ended) so that you can monitor and report on the status of the project, based on these milestones.

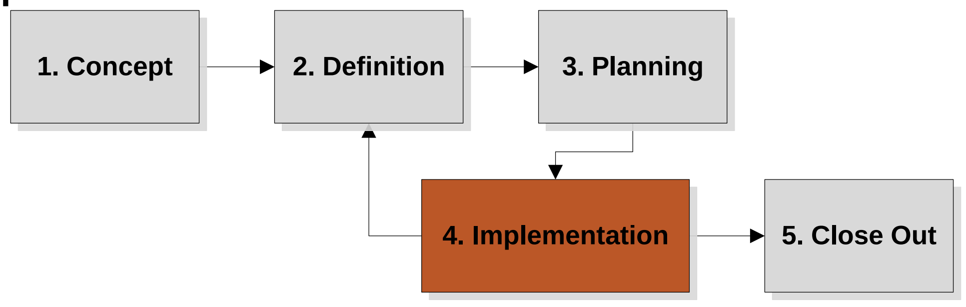
When creating a schedule, you have to be sure to make ***reasonable estimates***, which are based on ***experience*** and ***team involvement***. If your schedule does not match the deadline given to you then this has to be analysed and any risks reported to management.

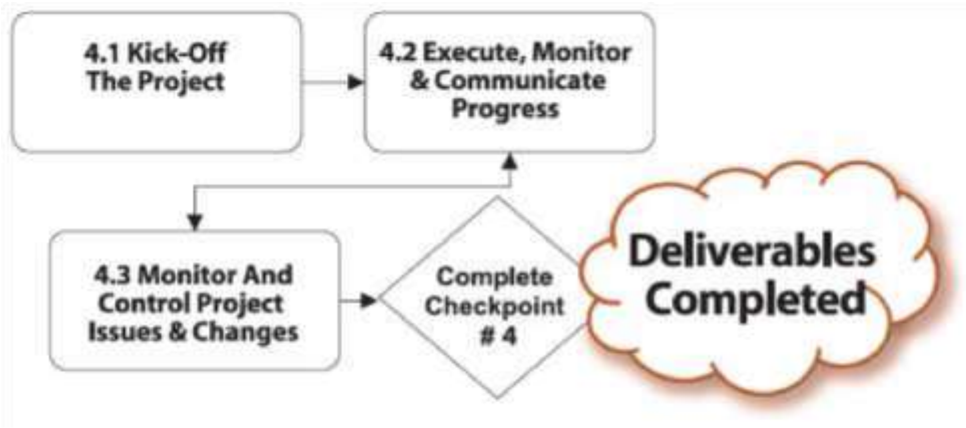
Complete Checkpoint #3 – Signed-Off Project Plan

Is the schedule complete and is it realistic?

- *Is there one and only one person responsible for every task on the project?*
- *Have the team and other stakeholders been involved at each step? Have they contributed and do they feel committed to the project?*
- *Have the risk plans been incorporated into the schedule?*

5 Implementation Phase





The Implementation Phase (phase 4) is all about doing what you said you would do in the project plan. However, ***things will not go as you planned!*** Therefore you will have to closely monitor key tasks and milestones and when changes are needed or requested, make sure that everyone is aware of what is going on.

5.1 Major Steps & Tools

Once the project has been planned and implementation starts, the project teams focus changes to monitoring and controlling mode.

5.1.1 Kick-Off the Project

A kick-off meeting is done to formally launch the project and to get people excited about what the project will deliver. Run by the Project Manager, it usually involves the project sponsor, core team members, and other interested stakeholders. Good kick-off meetings share these features:

- ***Prepared in advance***. Nobody should come to the meeting without having already agreed to all the agenda items. The purpose is not to have a discussion, but to get ***reconfirmation*** of objectives and plans, gain commitment, etc. The team should talk with key stakeholders in advance to ensure they are aware of all that is involved.

- ***Focused***. This meeting is to get executive buy-in, formally make people aware and build the team further. Ensure that the structure and presentation achieve these objectives. Do not dwell on technical areas unless there is a specific interest or question.
- ***Short***. Everyone should know what the project is about, this is done to simply remind them and keep them interested. Thirty minutes is usually more than enough, fifteen is better.

5.2 Execute, Monitor & Communicate Progress

You need more than a plan to get the work done on the project. A good project is like a good orchestra, it needs constant monitoring, direction and adjustment to achieve its objectives.

- ***Adjust tasks as necessary.*** Tasks are developed to deliver items or achieve objectives. If the tasks are not working as well as planned, or if they need changing, discuss this with the proper people and make adjustments, as long as they do not impact on the deliverable due date, or a milestone date. Tasks will change, milestones and deliverables should not.
- ***Communicate and monitor on a regular basis.*** There should be ongoing, informal communications among the team members and assistance provided whenever needed. There should also be a formal meeting (e.g. team status meeting, one-on-one reviews) where members present progress to date, issues and new forecasts for when tasks will be completed. Much of this should be in your ***communications plan***.
- ***Hold effective meetings.*** Meetings take time and use up resources. Bad ones can reduce morale, lower effectiveness and create an atmosphere where time is thought to be unimportant. All good meetings share common elements. They have a ***clear overall objective***, which might be to gather status, boost morale, or inform the sponsor of issues. They have an **agenda**, which focuses on specific items (not open-ended!) to be solved. They're ***short***. With senior management 30 minutes is a target figure, however with the team try 45 minutes. They should be ***consistent*** (e.g. weekly) but allow for cancellation if there are no problems to solve. **Minutes** of the meetings should be prepared and circulated to ensure the discussions / decisions are clearly understood by all stakeholders.

5.2.1 Monitor and Control Project Issues & Changes

Spending time during the planning phase to scope the project well will reduce many change requests during the implementation phase. However, it will not eliminate all of them. Change during the project is very much like someone braking and then speeding up on the highway - the slowing down and disruption it causes will last much longer than the original incident. Projects that allow many changes (***scope creep*** - multiple, small changes on a regular basis) rarely finish well. This should be avoided at all costs.

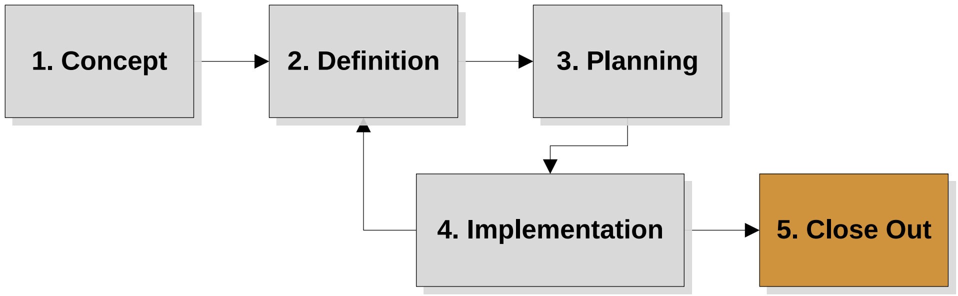
The **change management process** and **change request form** are used to deter, regulate and finally plan, for changes. The major elements of the change request form include:

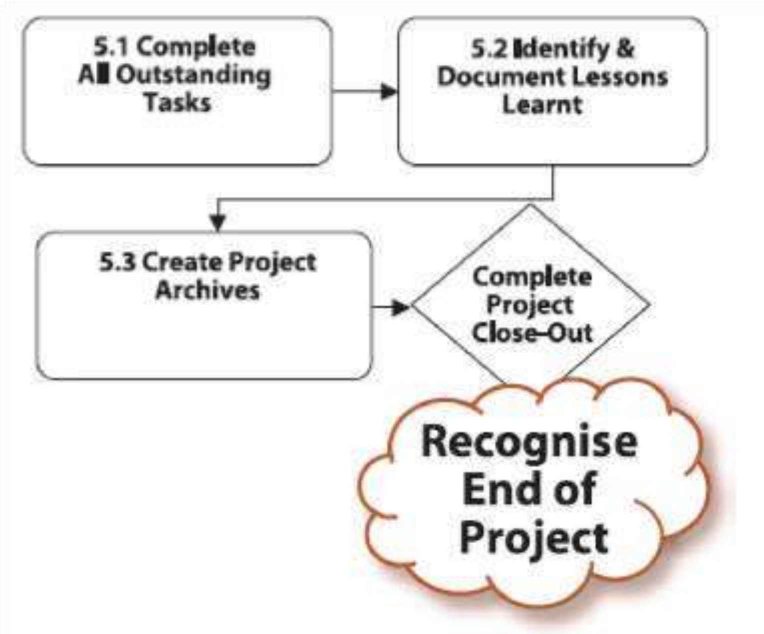
- ***Description & Rationale:*** A brief summary of what is being requested, why it is necessary and what impact it is expected to have on the project. This is very similar to the initial goal-setting of the project - ***without a clear reason for the change, there should be no change at all!*** Examples include:
  - A new function must be added because the client needs it and it was originally forgotten;
  - The design must be changed because it will not work with a certain database;
  - The finish time must be shortened because another system requires it to be in place sooner.
- ***Assessment & Recommended Actions:*** The initial design and all changes will have an impact on a number of items including other tasks in the project, the budget, schedule and resources required. The assessment is carried out by the project team to ensure that the change requested is worth it - given the consequence it will have on other parts of the project. If you are unsure of the consequence, try to give a range of estimates that will indicate the impact (e.g. 30 - 45 days).
- ***Approval:*** At the end of the process, management must either approve or reject the change based on its need and assessed impact. If the change is accepted, then the team will have to sit down and make the required changes in the plan.

Complete Checkpoint #4 – Deliverables Complete

- *Did you start the project well (kick-off) and is each person aware of his or her roles and responsibilities?*
- *Are the milestones being reached as planned? If not, what are the causes?*
- *Has the team communicated on a regular basis?*
- *Has management been involved?*
- *Is the scope being respected?*
- *Are people changing things as they go?*
- *Are all major deliverables as listed in the Project Schedule complete?*

6 Close-out Phase





The Close-Out Phase (phase 5) is perhaps the least understood and least appreciated of all phases. It is during this phase that the deliverables are turned over to the client and signed off, key documents archived for the future and lessons learnt are discussed. Developing into a first rate project management organisation takes time and ***only by reviewing the results at the end and learning from them, will any organisation continue to improve.*** The **Close-Out Report** should capture the project information.

6.1 Major Steps & Tools

6.1.1 Complete All Outstanding Tasks

This step is essentially cleaning up all the small items that are outstanding.

- Finish up remaining and necessary tasks/deliverables in the project schedule.
- Resolve any outstanding project issues, change requests or action items.
- Complete all required documentation such as user guides or product descriptions.

6.1.2 Identify & Document Lessons Learnt

The objective of the lessons learnt process is to improve for the future. This is both at the organisational level as well as for individuals. The entire process should be ***positive and encouraging***. This is not the time to cast blame! If you do, you risk offending team members and damaging your future projects.

A simple **lessons learnt form** is used that requests input from the team, sponsor, etc. Someone from the project, as determined in the WBS, should send it out and collect the data, then summarise it for the meeting. The comments should be anonymous. The meeting should be positive, with things to improve mixed in with success stories. If there are process improvements to be made (e.g. templates need adjusting), then these should be noted and assigned to someone or fed back to GTAC as lessons learnt.

6.1.3 Create Project Archives

Archives are the memory of the organisation's projects and along with lessons learnt are the key to improving for the future. It is important to keep records of both what the project delivered, and how it was delivered. What was delivered (the product of the project) is of course important to the Sponsor and the Project Stakeholders. Project documentation that is related to how things were delivered is important for future projects and lessons learnt. Consolidate project information in a meaningful way and prepare for storage according to the Department Policies, Standards and Procedures.

Complete Project Close-Out

Projects have a beginning and an end and the task of closing is just as important as the starting. The checklist below is to assist the team in finalising the project and moving on.

- *Verify **throughout** the project that the Project Sponsor is getting what they requested.*
- *Get the key stakeholders (sponsor) to formally sign off.*
- *Communicate to all stakeholders that the project is now complete.*
- *Close out contracts with vendors, contractors, etc.*
- *Do team reviews as needed and thank each member for their work.*
- ***Celebrate the end of the project with the core and extended team!***

7 Appendix A: Documents and Templates

The table below indicates all documents that form part of the PPM Toolkit. Those that are specifically mentioned in this document are indicated.

For the latest versions and to download templates, please refer to http://www.gtac.gov.za

Toolkit Section	Ref #	Document Name	Guide to Project Start Up
1		Framework and Methodology and Guides	
	SUM	Project Management Summary Guide	✓
	FWK1 *	Project Management Framework	✓
	FWK2 *	People and Organisational Change Framework	
	MET1 *	Project Management Methodology	✓
	GUI1	Guide to Project Start Up	
	GUI2	Guide to Project Sponsorship	
	GUI3	Guide to Charter Writing	
	GUI4	Guide to Project Planning	
	GUI5	Guide to Smaller Projects	
	GUI6	Health Check Guide	
	GUI7	Programme / Project Management Office Set Up Guide	
2		Concept Phase	
	CON1	Environmental Scan	
	CON2	Situational Assessment	
	CON3	Needs Statement	
	CON4	Commitment to Change	
	CON5	Stakeholder Analysis	
	CON6	Vision Statement	
	CON7	Impact, Outcomes, Outputs, Indicators	
	CON8	Alignment to Strategy	
	CON9	Options Analysis	
	CON9a	Option Analysis Checklist	
	CON10	Clients and End-User Requirements	
	CON11	Business Case	
	CON12	Change Readiness Questionnaire	✓
	CON13	Concept Phase Checklist	
	CON14a	Lessons Learnt Gathering Form	
	CON14b	Lessons Learnt Log	
3		Definition Phase	

Toolkit Section	Ref #	Document Name	Guide to Project Start Up
	DEF1a	Governance Structure	
	DEF1b	Organisational Structure	
	DEF2	Terms of Reference	
	DEF3	Core Team Member Requirements	
	DEF4	Human Resource Management Plan – Core Team	
	DEF5	Project Team Member Evaluation	
	DEF6	Project Team Directory	
	DEF7	Roles and Responsibilities Matrix	
	DEF8	Team Agreement	
	DEF8a	Establishing Ground Rules	
	DEF8b	Operating Effectiveness of Team	
	DEF8c	Elements of Team Work Audit	
	DEF9	Scope Statement	
	DEF10	Stakeholder Interests Needs Assessment	
	DEF11	Project Charter	✓
	DEF12	Definition Phase Checklist	
	DEF13a	Lessons Learnt Gathering Form	
	DEF13b	Lessons Learnt Log	
4		**Planning Phase**	
	PLA1	Scope Management Plan	
	PLA2	Work Breakdown Structure	✓
	PLA3	Project Deliverables Chart	
	PLA4	Project Budget	
	PLA5	Project Schedule	
	PLA6	Human Resource Management Plan - Implementation Team	
	PLA6a	Performance Development Plan (Short)	
		Performance Development Plan (Comprehensive)	
		Communications Management Plan	✓
		Communications Worksheet	
		Performance Reporting Chart	

	PLA6b	Quality Management Strategy	
	PLA7	Quality Assurance &Control Chart	
	PLA7a	Risk Management Plan	
	PLA7b	Risk List & Risk Matrix	
	PLA8a	Stakeholder Management Plan	
	PLA8b	People and Organisation Change Plan	
	PLA9a	Building Consensus	
	PLA9b	Change Resistance Scale	
	PLA10	Evaluate the Change Plan	
	PLA11	Project Plan	
	PLA11a	Lessons Learnt Gathering Form	✓
	PLA11b	Lessons Learnt Log	
	PLA11c		
	PLA12		
	PLA13a		
	PLA13b		
5		**Implementation Phase**	
	IMP1	Meeting Agenda	✓
	IMP2	Meeting Minutes	✓
	IMP3	Action Items List	
	IMP4	Weekly Status Report	
	IMP5	Monthly Status Report	
	IMP6	Risk Management Form	
	IMP7	Issues Management Process	✓
Toolkit Section	**Ref #**	**Document Name**	**Guide to Project Start Up**
	IMP7a	Issues Management Form	
	IMP7b	Issues Log	
	IMP8	Change Control Process	✓
	IMP8a	Change Request Form	✓

IMP8b	Change Control Log	
IMP9	Deliverables Acceptance Sheet	
IMP10	Start-Up Checklist	
IMP11a	Lessons Learnt Gathering Form	
IMP11b	Lessons Learnt Log	
6	**Close Out Phase**	
CLO1	Sponsor Sign-Off Form	
CLO2	Customer Sign-Off Form	
CLO3	Lessons Learnt Report	✓
CLO3a	Lessons Learnt Log	
CLO3b	Lessons Learnt Gathering Form	
CLO3c	Facilitating Lessons Learned Sessions	
CLO4	Project Close-Out Report	✓
CLO5	Close-Out Phase Checklist	✓
7	**Smaller Projects**	
SML1	Business Case for Smaller Projects	✓
SML2	Project Charter for Smaller Projects	✓
SML3	Project Plan for Smaller Projects	✓
SML4	Change Request for Smaller Projects	✓
SML5	Status Report for Smaller Projects	✓
SML6	Lessons Learnt for Smaller Projects	✓