



AUSTRALIAN MEAT PROCESSOR CORPORATION

Designing complex projects

An e-learning program for project managers in the meat industry

Handbook for participants

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1.0 Introduction

1.1 Introduction to the handbook for participants

The handbook for participants supports participants undertaking the *'Designing complex projects e-learning program for project managers in the meat industry.'* The handbook may be read in conjunction with viewing each module of the online e-learning program. The handbook may also be used for revision purposes and as a reference resource after completing the e-learning program. The handbook also sets out the assessment tasks for each module of the program. The assessment tasks each comprise components of documentation for the design phase of managing a project.

1.2 Introduction to the e-learning program

The e-learning program is developed in Adobe Captivate 8 software that allows a wide range of interactive and responsive HTML5-based e-learning content that may be used on desktops, laptops or loaded onto the web. The Adobe Captivate software provides total flexibility to users in that the program can be provided as a DVD and used by single users as a stand alone program (e.g. by industry project managers), or it can be used by groups (such as Registered Training Organisations), loaded onto a website, wikis and forums hosted, and delivered to groups of industry personnel by a facilitator.

1.3 Goal of the e-learning program

The goal of this e-learning program is to support meat processing plant personnel through the process of designing a new project for implementation in their plants by working through the steps in the design phase of project management.

1.4 Outcomes of the e-learning program

'If you fail to plan you are planning to fail.' (Benjamin Franklin)

The main outcomes of the e-learning program are a business case and project management plan for your project. A well planned and considered project management plan places you in the best possible position for successful outcomes for your project.

If you have selected to undertake the program online with a group you will also have the opportunity to build a network of colleagues who are also designing and implementing similar projects in their plants.

The e-learning program has been designed to meet the requirements for the unit of competency, *'Design complex projects.'* In order to gain credit for this unit you need to enrol in the unit with a Registered Training Organisation (RTO) who has the unit on their scope for delivery, and meet their assessment requirements for the unit. In this case enrolment in the unit may provide a credit towards the Diploma or Advanced Diploma of Meat Processing.

1.5 Contents of e-learning program

The e-learning program is made up of seven modules. These modules cover:

1. Introduction to program, projects and project management
2. Exploring the potential of new technology for the business – determining the feasibility of the project
3. Defining the project
4. Developing the project work plan and compiling the project charter
5. Working with people
6. Managing quality and project changes and compiling the project management plans
7. Establishing the project

1.6 Delivery format

The training program is an e-learning program. As participants you will undertake the program online either individually by loading a DVD onto your desktop or accessing the program through a website. Generally the program will be conducted with a facilitator and a small group of participants so that you have the opportunity to work with other meat processing personnel who are all in the process of designing a new technology project for their plant. Participants will be led and supported by the facilitator who will work with you throughout the program. The program is comprised of e-activities such as presentations, online forums and wikis (view 'Wikis in plain English' on YouTube if you'd like more information on wikis).

1.7 Assessment

The goal of this program is to support meat processing plant personnel through the process of designing a new technology project for implementation in your plant by working through the steps in the design phase of project management. The assessment tasks relate directly to the 'products' required for the design stage of a project. The main products are the business case or project charter and the project management plan. These main products or assessment tasks are in turn broken down into smaller components or assessment tasks such as developing SMART objectives and success criteria for the project. All assessment tasks and activities (including participation in e-learning forums and wikis if you are completing the program in a group with an RTO) must be completed to the standards required in order to meet the requirements of the unit of competency and meet the goal of designing your project.

1.8 Resources

The main resources for this program are this '*Handbook for participants*' and the AMPC/MINTRAC '*Resource manual for adopting technology*.' Additional resources for each module are included in the relevant areas of this handbook.

1.9 Before the training

1.9.1 Project identification

Prior to commencing this program you need to have a project in mind that you will be managing in your meat processing plant. This project will generally have been initiated by senior management. For example, the objective may be to improve slaughter floor or boning room operations, or a decision may already have been made say to install a robotic brisket cutter to reduce work health and safety injuries, reduce the risk of internal organ puncture that requires trimming and reduces yield. Generally you will have been appointed the internal project manager for the project.

You may be undertaking this training program in association with conducting a Plant Initiated Project (PIP) project with the Australian Meat Processor Corporation (AMPC).

1.9.2 Mentor

It is recommended that you have an on-site mentor who has experience managing projects in your plant, with whom you meet regularly to help you work through the process of designing your project and developing your project management plan.

Identify the on-site mentor prior to commencing this program. Discuss your project with them, your role in the project, the goals of the e-learning program, your strengths and weaknesses, and together identify the assistance the mentor can give you designing your project and meeting the requirements of the e-learning program. Discuss and agree on how frequently you would like to meet with them.

2.0 Module 1: Introducing participants, program and projects

2.1 Overview of module one

'If you fail to plan you are planning to fail.' (Benjamin Franklin)

In this module you begin your journey through the design phase of project management. You are given an overview of the e-learning program and project management, and you introduce yourselves and your projects to each other.

The introduction to the e-learning program gives you an overview of the e-learning formats, the preparation for the training, what is expected of you as participants throughout the program, the assessment process and meeting the requirements for the '*Design complex projects*' unit of competency.

You then move on to gain an overview of the application of a project management approach to managing the design of a project in the meat industry.

Finally, if you are undertaking the program online with a group, you have the opportunity to meet (online) your fellow participants in the program, understand their roles at work and with their project, and gain an understanding of each of the projects they are working on.

2.2 Introduction to project management

2.3 What is a project?

Generally the work we do may be categorised as operational or project work.

Operational work is the on-going work we do day after day producing the same results. Examples of on-going work may be the work that is conducted on the production line, meat safety, quality assurance or work health and safety tasks.

Projects on the other hand are temporary, one off, unique and have start and end dates. They generally have a specific goal, a budget and limited resources. They involve uncertainty and implement change. Examples of projects include the installation of a robot, the replacement of a boiler or the re-design of the boning room. Successful completion of projects generally leads to on-going operations. On completion of the projects installing the robot or new boiler, or the boning room has been re-designed

In addition to working through module one of the e-learning program you may like to view the YouTube video '*Project Management overview: Defining a project | lynda.com*' (2 minutes and 38 seconds).

2.4 What is project management?

Managing a project doesn't just happen. Projects need to be planned and managed to get the best possible outcomes. Project management is the process of managing the project from its start to a successful outcome. The key to successful outcomes of a project is to adopt and follow a structured and well defined methodology to keep you on track and help you achieve the best possible outcomes of your project. As Benjamin Franklin said '*If you fail to plan, you are planning to fail.*'

There are a range of standards, guides and methodologies for running projects. In this e-learning program we are going to use a typical approach to project management based on the premise that projects progress through a series of major stages that together comprise the project life cycle. The project management approach that we are going to follow in our e-learning program works through the stages of:

- Initiate, define or concept stage
- Plan stage

- Execute or implement stage
- Control or monitor stage
- Close the project.

You may use any project management approach you choose to follow. It is best if your organisation consistently uses the same approach and terminology so that you all understand each other and what is going on at any time, and you can utilise lessons from one project to the next.

2.5 What is the project life cycle?

Project life cycle refers to the progression of a project through a number of stages from the concept stage, through to planning, implementing, monitoring, and completing and closing the project.



Although the stages in project management are depicted in a linear way and in the big picture you follow the linear pathway, you will also find that you are working backwards and forwards across the stages throughout the project.

In addition to working through module one of the e-learning program you may like to view ‘Project management life cycle – PM 101’ (2 minutes and 8 seconds)

<https://www.youtube.com/watch?v=817QqvrZX4U>.

2.6 Introduction to participants and your projects

If you are participating in a facilitator led, group delivery of the e-learning program you are invited to join the online forum to introduce yourselves and your projects to each other and discuss how you came to be in this position, i.e. how the plant decided to do the project and how you got your position in regard to the project. We will also hear from a meat industry project manager how projects are initiated and managed in their plants.

2.7 Assessment tasks for module one

The assessment tasks for module one are:

- Participation in the online forum
- Completion of assessment checklist.

Assessment checklist

- I understand I am working through the process of designing a project for my plant
- I have a project at my plant that I will design for this program
- I have a mentor at my plant and we have a plan for support with the program and project
- I commit to working through the seven modules of the program
- I commit to participating in the program activities including online forums and wikis (as appropriate)
- I commit to completing all assessment activities including elements of the project management plan
- I commit to compiling the whole project management plan for my project as an outcome of this program.

2.8 Resources

1. YouTube video 'Project Management overview: Defining a project | lynda.com'
<https://www.youtube.com/watch?v=mBeGqDpYKjU> (2 minutes and 38 seconds)
2. YouTube video 'Project management life cycle – PM 101'
<https://www.youtube.com/watch?v=817QqvrZX4U> (2 minutes and 8 seconds)
3. UTS: Project Management - Resources - Templates and tools
www.projects.uts.edu.au/resources/templates.html
4. The Value of Project Management http://www.pmi.org/Business-Solutions/~media/PDF/Business-Solutions/Value%20of%20Project%20Management_FINAL.ashx
5. The Value of Project Management <http://www.tensteppm.com/open/A1ValueofPM.html>
6. Australian Institute of Project Management <https://www.aipm.com.au/resources>

3.0 Module 2: Defining your project

3.1 Overview of module two

'Many people fail in life, not for lack of ability or brains or even courage, but simply because they have never organised their energies around a goal.' (Albert Hubbard)



In module two we begin our journey through the project management life cycle at the initiating, defining or concept stage of the project management life cycle by focusing on identifying and investigating exactly what the project is and the reasons for the project, and then assessing the implications of the project for your organisation.

The company has made a decision to initiate a project, e.g. install a robotic brisket cutter for small stock processing. The initiation stage of project management begins the process of working out exactly what the

project is and what we want to achieve, and determining the feasibility of the project by answering is it going to be possible to do this effectively?

3.2 What is covered in the initiating stage of project management?

In the initiation stage of project management we focus on:

- **Defining our project** i.e., defining our 'destination' so that we have a clear, concise and accurate description of the goals, objectives and scope of the project so we can track our progress and continue on target and ensure the final product meets our specifications.
- **Determining the feasibility of the project** by investigating whether it will be possible to do the project to meet the outcomes we've set.

3.3 What is the product of the initiating stage of project management?

The final product of the initiation or concept stage is the business case or project charter. The business case or project charter is a document that outlines the project and the reasons for starting the project and is signed off by the most senior manager of your project.

4.0 Developing SMART goals and objectives

4.1 How do you develop clear and specific goals and objectives?

The overall goal of the project describes the results or outcomes of the project. The project goal needs to be stated as specifically as possible so that the project has the best chance of being successful and achieving what the company wanted to achieve. The process of identifying the needs, problems and reasons for the change will help you to describe the goal of your project. We can continue to refine our project goal and break that down into more specific objectives as we progress through the planning stage of our project.

For example the overall goal may be to install a robotic brisket cutter on the small stock chain. This goal is clear enough for the project manager to be able to go away and organise the installation of a robotic brisket cutter. However, having this goal alone could get us into trouble along the way. We may not have sufficient funds to cover the project. Our robot may not meet our needs – it may not be able to operate fast enough, it may increase contamination, it may not be reliable, it may not be able to cope with different size stock, it may not be able to be serviced, it may not have trained operators, there may be no alternative method if the robot fails. It is critical to take the time to define the overall goal and specific objectives as clearly and concisely as possible.

In order to state our goal as precisely as possible our goal may be re-defined to 'install a robotic brisket cutter for small stock by December 2015 that ensures a clean, accurate cut every time; reduces contamination; is reliable and requires minimal servicing and reduces the incidence of accidents and injuries associated with the operation. Train operators and maintenance staff to service the robot and enter into an agreement with a contractor for preventive maintenance and servicing.'

One common method of developing objectives or goals that are as clear and specific as possible and provide a clear route to success is to follow the SMART approach to developing goals. All SMART goals have five attributes. They are:

- **Specific** in that it describes how we know we've achieved it and by when as agreed by major stakeholders
- **Measurable** for example the specifications for the robot define what the robot can do in measurable ways
- **Agreed** on by major stakeholders (and signed off by the most senior manager in the project charter)

- **Realistic** in that the major stakeholders agree that it can be achieved within timeline and budget with designated resources
- **Time-based**, i.e. sets a realistic timeline for completion of the project.

For example we may say we want to cook steaks for dinner. Our goal is 'to cook steaks for dinner.' This goal doesn't give us enough information to be totally successful. We need to know how many people we are cooking for, what time they want dinner, what type of steaks we'll use etc.

In this example, using our SMART analysis to construct our goal to be successful our goal becomes 'Cook six rare T-bone steaks on the barbecue for our family of six people to be served at 7 pm tonight.' This goal is specific, measurable, agreed on, realistic and time-based.

We can continue to refine our project goal and break that down into more specific objectives as we progress through the initiating and planning stages of our project.

Having developed our project goal we may then go on to develop specific SMART objectives to address specific areas of what you are trying to achieve. For example you may have specific objectives related to:

- Meeting the specifications for the product
- Delivering the project on time and within budget
- Training of staff in operation, cleaning, maintenance and servicing
- Arrangements in the event of servicing and breakdowns.

In addition to working through module two of the e-learning program you may like to view the YouTube video 'How to write a SMART goal' https://www.youtube.com/watch?v=0Mi9_XEXQqc (2 minutes and 38 seconds).

5.0 Developing a statement of the project scope

5.1 What is scope?

Scope defines what the project will actually deliver and the work required to achieve the deliverables. Scope is everything in a defined boundary. We need to define that boundary clearly. Everything else is outside that boundary or out of scope. If the boundaries aren't clear there may be pressure to expand the scope during the project. This is called scope or mission creep.

There are two components of scope. The two components are:

- What the project delivers (product scope)
- The work of the project (project scope):

Product scope: Specifies our destination so everyone involved with the project has a shared understanding of the product and understands what needs to be included in the project. There is absolute clarity about the destination and the destination is the outcome needed. For example the product scope will include the specifications for the product. Agreement also needs to be reached about the extent of what is included with the product. Product scope may, for example include training of operators and maintenance staff, servicing and maintenance.

Project scope: Project scope is the work of the project. For example the project scope will change if the product scope includes installation, training, servicing and maintenance. Everything that you do in a project is going to be based on the scope. The work that you do in the project is the work required to produce the project goal. The scope sets out the details about the project goal. Everything in your project management plan

is based on the scope of the project. The scope is used to calculate the work plan, the resources, timelines and budget

5.2 What happens if you don't define scope clearly?

If you get the scope wrong you're in trouble from the start. If the boundaries aren't clear there may be pressure to expand the scope during the project. This is called scope or mission creep. It is important to agree on what is in scope and what is out of scope. Key personnel may not agree on what is in and out of scope. For example, are installation, training, servicing and maintenance included in the scope of the project? Not having them in the scope of the project could jeopardise the success of the project. If they are part of the project then you need to have the resources such as the budget allocated to manage them.

5.3 How is scope set out in project documentation?

Scope is set out in project documentation in a scope statement. Scope statements include:

- A description of the scope
- A list and specifications for the deliverables
- Exclusions listing what isn't in the scope
- Constraints or limiting factors for your project such as resources, budget, time, quality, health and safety
- Assumptions which are statements of the givens or what you believe to be true for the sake of planning, e.g. you will be provided with the staff you need with the skills required to manage the project.

In order to develop your statement of scope you should follow a similar process to develop each element of your documentation for your project. This includes:

- **Conducting observation on the job** – considering before and after the project covering the 5Ps:
 - Process/Production
 - Performance (e.g. monetary, outcomes, quality)
 - People
 - Place (environment)
 - Procedures (e.g. SOPs, work instructions, QA, hygiene and sanitation, work health and safety)
- **Interviewing and consulting with key personnel** driving the change and most affected by the impact of the change (e.g. the most senior manager who commissioned the project, the supervisors and managers of the area, operators, WHS manager and representative, QA manager, meat inspectors)
- **Searching the data** e.g. the contract and specifications for the new technology, WHS, QA and hygiene and sanitation requirements.

6.0 Developing success criteria

6.1 What are success criteria?

Identifying the project success criteria in the planning stage is critical to the success of the project. The more clearly you define the success criteria right from the start of the project, the easier it is to measure the project's success at the end of the project. The success criteria identify how to measure the success of the project when it is completed. Success criteria enable us to measure the outcomes of the project that is whether we have achieved what we set out to achieve. Success criteria answer questions such as:

- How will you know the project is completed?
- How would you define the success of the project?
- How will you know the new technology meets company needs?

- How will you measure how well the project has been done?

Looking at our 'cook steaks for dinner' example. We need to identify success criteria that are measurable. These criteria may be:

- Six 300 gram T-bone steaks purchased from Joe's Quality butchers
- Weber barbecue instructions followed to heat barbecue to optimal temperature as specified in instructions
- Recipe for cooking steaks to 'rare' followed and steaks tested to 'rare' guidelines prior to serving
- Steaks ready for serving at 7 pm
- Six family members seated and ready to eat the steaks at 7 pm

These success criteria are specific and measurable.

The success criterion could have been 'everyone loved the steak' but this may not be an accurate measure of how well the steaks are cooked if the steaks are ready an hour before the specified time or the barbecue temperature isn't hot enough. The key point is that the more clearly you define the success criteria right from the start of the project, the easier it is at project handover to measure the project's success.

Key stakeholders need to be consulted about the success criteria. For example, in our plant situations the senior manager commissioning the project needs to help set the success criteria, as does the manager of the production area involved and the maintenance staff who will need to service and maintain the new technology.

Success criteria may relate to:

- **The way the project is run** e.g. the project is conducted within set schedule or timelines, within budget, within scope and within quality criteria
- **The end product, e.g. the specifications for the product**

SMART goals or objectives help define the project's success criteria about the way the project is run, as they include specific measurable, realistic criteria that help us see how we are progressing and measure achievement.

Success criteria in your own projects may relate to:

- Specifications for performance of the robot
- Criteria to measure that the robot is meeting the speed of the chain, meat product specifications, QA requirements, hygiene and sanitation requirements, work health and safety requirements etc
- Maintenance staff have the competencies to operate, calibrate, diagnose faults, service and maintain the new technology
- A service agreement in place with contractor that guarantees service response within 24 hours
- An alternative option is available to perform the task in the event of breakdown

6.2 How do you develop success criteria?

Goal

Your goal is to develop success criteria that clearly and concisely measure what you are setting out to achieve and the key people involved agree the project is successful at handover.

Consultation

You need to develop the success criteria in consultation with key stakeholders. You need to decide whom you need to consult with and what you need to ask them.

Types of success criteria

You need to identify success criteria about the end product and the process of conducting the project.

The process of identifying the success criteria

- Start from your project goal and SMART objectives to identify your success criteria.
- Develop the specifications that measure the success of the end product
- Review project impacts and identify project success criteria against the SMART project goals or objectives that you've identified
- Interview key personnel driving the change and most affected by the impact of the change (e.g. the most senior manager who commissioned the project, the supervisors and managers of the area, operators, WHS manager and representative, QA manager, meat inspectors)
- In order to take **a systematic approach to identifying success criteria** you may once again **consider criteria in the 5P areas** of – Process/Production, Performance (e.g. monetary, outcomes, quality), People, Place (environment) and Procedures (e.g. SOPs, work instructions, QA, hygiene and sanitation, WHS).

Compile list

Compile your list of success criteria for your project. This list of success criteria form part of the documentation for your project.

Online forum

If you are participating in online delivery of the program in a group, join the online forum discussing the main success criteria you have identified for the products and process of conducting your project.

6.3 Assessment tasks for module two

There are three assessment tasks for module two, each of which are components of your project documentation forming part of your project charter or business case for the project. The three assessment tasks are:

- Writing SMART goals for your project
- Developing a scope statement for your project
- Developing success criteria for your project.

6.3.1 Assessment task one: Writing SMART goals for your project

The first assessment task for this module is to write SMART goals or objectives for your project.

Develop an overall goal for your project by defining what you want to achieve and refining that goal by working through each of the SMART elements.

Develop specific SMART objectives to address specific areas of what you are trying to achieve. For example you may have specific objectives related to:

- Meeting the specifications for the product
- Delivering the project on time and within budget
- Training of staff in operation, cleaning, maintenance and servicing
- Arrangements in the event of servicing and breakdowns.

6.3.2 Assessment task two: Developing a scope statement for your project

Develop a scope statement for your project that includes:

- A description of the scope
- A list and specifications for the deliverables
- Exclusions listing what isn't in the scope
- Constraints or limiting factors for your project such as resources, budget, time, quality, health and safety
- Assumptions which are statements of the givens or what you believe to be true for the sake of planning, e.g. you will be provided with the staff you need with the skills required to manage the project.

6.3.3 Assessment task three: Developing success criteria for your project

- Develop the specifications that measure the success of the end product
- Identify project success criteria against the SMART project goals or objectives that you've identified
- Interview key personnel driving the change and most affected by the impact of the change
- In order to take a systematic approach to identifying success criteria you may once again consider criteria in the 5P areas of Process/Production, Performance, People, Place and Procedures.

6.4 Resources

1. YouTube video 'How to write a SMART goal' https://www.youtube.com/watch?v=0Mi9_XEXQqc (2 minutes and 38 seconds)
2. YouTube video 'Project Scope' Mike Clayton <https://www.youtube.com/watch?v=cFFaq5MpL60> (4 minutes and 28 seconds)
3. YouTube video 'Project Success Criteria, Factors and Benefits' https://www.youtube.com/watch?v=X6_1wXZUwj4 (1 minute and 59 seconds)

7.0 Module 3: Exploring the potential of new technology for the business – determining the feasibility of the project

7.1 Overview of module three



In module three we continue our journey through the initiating stage of project management. In module two we began the process of working out exactly what the project is and what we want to achieve. In module three we focus on the feasibility of the project by investigating whether it is going to be possible to do this effectively, i.e. investigating whether the new technology will meet the needs effectively.

7.2 How is the feasibility of the project determined?

Adopting new technologies can provide important strategic opportunities but also poses challenges such as how to manage if the new technology breaks down, production stops and there is a delay in fixing the breakdown. The critical question is whether the new technology will solve the problem effectively.

In order to answer this question we need to investigate the problems that may arise in relation to the project. We need to understand what the issues are and whether it is possible to solve them. We need to analyse the problems to see whether the new technology solves the problems effectively.

The feasibility of the project is determined by:

- Identifying the needs, problems and reasons for the project
- Identifying the advantages and disadvantages of the project

- Assessing the impacts of the project
- Identifying, assessing and mitigating the risks of the project

This information is then used to determine whether the proposed project is the most effective solution and the company should proceed with the project.

For example, the CEO decided to install a robotic brisket cutter to reduce injuries to workers and reduce risk to carcasses of puncture of internal organs resulting in re-work of product, excessive trimming and reduced yield.

A feasibility study was conducted indicating that with installation of the robotic brisket cutter there would be:

- Reduction in accidents and injuries
- Labour savings
- Increased accuracy
- Less contamination
- Reductions in re-work and trimming
- Payback period of less than two years

In addition to working through module three of the e-learning program you may like to view the YouTube video 'Feasibility study' Nick Jackson <https://www.youtube.com/watch?v=A57ZQKMxQs> (6 minutes and 8 seconds).

7.3 How do you conduct a feasibility study?

In order to conduct a feasibility study you need to:

- Identify the needs, problems and reasons for the project
- Identify the advantages and disadvantages of the project
- Assess the impacts of the project

By:

- Interviewing and consulting with key personnel driving the change & most affected by the impacts of the change
- Searching internal and external data
- Conducting observation on the job considering before and after the project.

In each area of your study consider the impacts in relation to the 5Ps, i.e.:

- Process/production (technical aspects, process improvements, new products, process capability and capacity, maintenance and servicing, breakdowns, interruptions to production, yield, efficiency)
- Performance (monetary performance, QA, hygiene and sanitation, WHS)
- People (skills, training, redundancies, labour savings, WHS)
- Place (environment, energy costs/savings, improved work environment)
- Procedures (SOPs, work instructions, WHS policies and procedures).

The outcomes of this exercise form components of your project documentation which will be compiled into the project charter or business case for your project.

8.0 Risk Management

8.1 How do you identify and manage the risks associated with your project?

The process of identifying the needs, problems and reasons for the change will have brought out some of the risks associated with the project. Risks are defined as 'any event that may adversely affect the ability of the solution to produce the desired deliverables or outcomes.'

The steps in the process of eliminating or reducing risks to the lowest possible levels are:

- Identifying and defining the risks
- Analysing the risks and
- Managing the risks.

In order to take a systematic approach to identifying potential risks you may consider risks in the 5P areas:

- Risks to **process/production**, e.g.
 - Control errors (e.g. operator or programming errors)
 - Calibration errors
 - Mechanical failures
 - Not performing to manufacturers specifications
 - What happens in the case of breakdown and production is slowed or stopped
 - Alternative to robot to maintain production
 - Servicing and availability of parts
- Risks to **performance**, e.g.
 - Time blowouts for completion of project
 - Cost blowouts
 - Not performing to manufacturers specifications
 - Quality problems
 - Contamination problems
 - Servicing risks (agreements in place with response time within 24 hours)
 - Health and/or safety risks
- Risks to **people**, e.g.
 - Skills gaps including:
 - competencies of operators
 - competencies of maintenance staff to recognise faults, service and maintain plant
 - competencies of cleaners
 - Redundancies
 - Health and/or safety risks
 - Contractors
 - Gaining support from all stakeholders
- Risks to **place**, e.g.
 - Impact on environment (noise, vibration, lighting)
 - Ergonomics
 - Safe access for cleaning, servicing and maintaining
 - Safety of people in the vicinity
- Procedures
 - Need to develop procedures including:
 - Standard operating procedures
 - Work instructions (e.g. operating, calibrating, cleaning, servicing and maintaining)

In areas covering:

- Hygiene and sanitation
- Quality assurance
- Work health and safety

8.2 What strategies can be used to minimise risks?

Risk management strategies that can be used to reduce the risks to the lowest possible levels include:

- **Elimination** of the risk which is always the most effective strategy
- **Mitigation** of the risk which is planning to reduce the risk to the lowest possible level
- **Contracting out the risk** - however the contract still needs to be managed carefully
- **Insurance** or transferring the risk through insurance
- **Contingency planning**, i.e. determining alternative strategies if the risk is triggered
- **Acceptance of the risk** if there is no alternative or if it is very unlikely or of little potential impact.

In addition to working through module three of the e-learning program you may like to view the YouTube video 'Project risk management' (James Clement) <https://www.youtube.com/watch?v=64SYPIMTz9U> (7 minutes and 33 seconds).

8.3 What do you include in a risk register and risk management plan?

Compile a risk register by meeting both individually and in a group with key project stakeholders and working systematically through the goals and objectives of the project and the work of the project. Identify the risks associated with each project objective and the work of the project. Then you need to analyse and assess each risk and identify control measures to reduce the likelihood and potential consequences of each risk to the lowest possible levels.

The risk management plan includes:

- Risk identification
 - Description of risk
 - Factors that may have contributed to risk
- Risk analysis and assessment
 - Potential consequences of risk
 - Likelihood of risk occurring
 - Risk rating
- Risk controls
 - Control strategies
 - Owner or person responsible for implementing the control measures
 - Date control measures need to be implemented by
 - Status.

8.4 Assessment tasks for module three

There are two assessment tasks for module three. Both of these tasks contribute to the project charter or business case which is the outcome of the initiating stage of project management. The assessment tasks are:

- Conducting a feasibility study for your project
- Compiling the risk register and risk management plan for your project.

8.4.1 Assessment task one: Conducting a feasibility study for your project

Conduct a thorough investigation of your project of the reasons for the change, the advantages and disadvantages of the proposed change and the impacts the change will have on your business.

Compile the outcomes of your investigation for your feasibility study into a brief report justifying why you are recommending that your company proceed with the project.

Submit a report that includes the reasons for your project, the advantages and disadvantages of the proposed change, the impacts the change will have on your business and the justification for why you are recommending your project proceeds.

8.4.2 Assessment two: Compiling the risk register and risk management plan for your project

The second assessment task for this module is to compile the risk register and risk management plan for your project. You may develop your risk management plan using the headings outlined above, or the template presented in the YouTube video 'Project risk management,' or completing the project risk management template used by your organisation.

8.5 Resources

1. YouTube video 'Feasibility study' Nick Jackson (6 minutes and 8 seconds)
<https://www.youtube.com/watch?v=A57ZQKMxQSs>
2. Undertake a Feasibility Study with a Project Management Template July 27 2007
<http://blog.method123.com/2007/07/27/feasibility-template/#!/prettyPhoto>
3. 'Feasibility study fact sheet'
http://www.egovernment.tas.gov.au/__data/assets/pdf_file/0008/78056/CConducting_a_Feasibility_S_tudy_Fact_Sheet.pdf
4. YouTube video 'Project risk management' (James Clement)
<https://www.youtube.com/watch?v=64SYPIMTz9U> (7 minutes and 33 seconds)
5. 'Business case fact sheet'
http://www.egovernment.tas.gov.au/__data/assets/pdf_file/0004/78061/Developing_a_Business_Cas_e_Fact_Sheet.pdf.

9.0 Module 4: Developing the project work plan and compiling the project charter

9.1 Overview of module four

'Planning is the key to a successful project.'

In module four we begin the planning stage of our project by developing the project work plan. We need the work plan to include in our project charter which is part of our initiating stage. We also need the work plan to include in our project management plan which is the product of the planning stage.

This means we are moving between the initiate and planning stages of project management. We said at the start of our program that project management was not a linear, sequential process but involved constant re-visiting of areas to further refine our products.



You then compile all the information you've collected so far to develop the product of the initiating stage which is the project charter or business case for the project.

10.0 Developing the project work plan

10.1 What is a project work plan?

The project work plan breaks down the elements of the project into small achievable activities. The work plan sets out the what, how, when, who and how much for our project. The work plan helps us organise the work in the project by providing a shared understanding of what has to be done, by whom and when.

10.2 What is included in the project work plan?

The project work plan includes the project:

- Objectives and activities
- Timelines and schedule
- Resources
- Responsibilities
- Milestones
- Costs compiled into the project budget.

10.3 How do you develop a work plan for your project?

It is recommended that you use a table or template to compile your work plan. A sample work plan template is included in this program. Alternatively you may use your organisation's work plan template or an alternative work plan template if you prefer.

Compile your work plan by working through the steps in the project work plan template as follows:

- **Project objectives** - start with your SMART objectives. Consider the steps in the process of conducting your project to achieve these goals/objectives and organise the goals into the steps you'll take in the project. In doing this you are creating the work breakdown structure by breaking the project down into work packages. Identify and include objectives for any of the other steps in the process of conducting your project.
- **Project activities** - the next step is to break the goals or objectives down into the activities that need to be done in each objective and the order in which they should be done.
- **Quality standards** (completed in the next module)
- **Activity durations and completion dates** - next you need to calculate the time each activity will take and the sequence of timing. You are creating the schedule for activities in your project.
- **Resources** - work out what materials, equipment and supplies will be needed for each activity
- **Responsibilities** - identify the person or persons responsible for each activity.
- **Milestones** are significant points or events throughout the project's life cycle. Examples of project milestones are start and end dates for the project. If your project is the installation of new technology then there are likely to be significant events listed in the contract such as dates when certain stages of the project must be completed. Go through the objectives in your project and identify and list significant milestones in your project.
- **Estimate costs by** considering the resources, staffing and duration of activities and make cost estimates against each activity.
- **Determine the budget** by adding up all the cost estimates to reach a baseline budget for approval and authorisation in your project charter.

12.0 Compiling the project charter or business case

12.1 What is the project charter?

The business case or project charter is a one-off, start-up document used by senior management to assess the justification of a proposed project. When approved, it confirms senior management support for the project and authorisation for the work plan such as resources and budget.

12.2 Why develop a project charter?

The project charter is developed to:

- Work with key stakeholders to document what the project will accomplish and how it will be accomplished
- Set out the requirements for the project
- Set out and gain approval for the resources required to conduct the project eg staffing, skills, budget
- Gain approval to proceed with the project
- Gain authorisation to proceed to the next stage of the project which is planning.

12.3 Who develops and compiles the project charter?

The project charter is usually developed and written by the project manager, as it is generally the role of the project manager to work with key stakeholders to plan the project and then manage the implementation of the project.

Alternatively the project charter may be developed by the project sponsor, ie the senior manager commissioning the project, as the project sponsor is responsible for oversight, funding and resourcing the project.

The key point is that the person who signs the charter must be the person paying for the project, ie the project sponsor.

12.4 What is included in the project charter?

A sample project charter or business case template follows. You may use this template to compile your project charter or you may use your organisation's project charter template or any other project charter template that meets the needs of your organisation.

12.5 What happens after your project charter?

Once you have sign-off on the project charter and agreement to proceed with the project you then move into the planning stage of the project and you re-visit and refine the components of your project making them as clear, concise and transparent as possible. To do this you work closely with your key project stakeholders to ensure you are all in agreement on the goal you are trying to achieve and the work to be done to achieve it and their roles in the project.

You also plan the implementation strategies. You refine your project methodology, schedule and budget and develop areas such as a communication strategy.

12.6 How do you develop the project charter?

Use the project charter template or your organisation's project charter template to compile the project charter for your project.

13.0 Project charter template

Project title

Business opportunity

(Summary of business opportunity, any supporting evidence to prove that the opportunity is real, the positive impact that the introduction of the new technology will have on the business)

Project goal

Product description

(Specifications for the final product of the project)

Reasons for the project

(The reasons why the problem exists)

Advantages of the proposed new technology

Disadvantages of the proposed new technology

Impacts of the proposed new technology

Project risk management plan

Project SMART goals/objectives

Project success criteria

Project work plan

Project budget

Project team

Project sign-off

Name of project sponsor:

Signature of project sponsor:

Date:

13.1 Assessment tasks for module four

There are two assessment tasks for module four. The assessment tasks are:

- Developing your work plan
- Compiling the project charter for your project.

13.1.1 Assessment task one: Developing your work plan

Work through the steps in the process of compiling your work plan by completing the project work plan template or using your organisation's project work plan template. Post your work plan in the program drop box. Have a look at the work plans of your colleagues. Discuss the work plans in an online forum with your colleagues.

13.1.2 Assessment task two: Compiling the project charter for your project

Use the project charter template or your organisation's template to compile and submit the project charter for your project.

13.2 Resources

1. YouTube video 'Work Breakdown Structure' James Clements (3 minutes and 4 seconds)
<https://www.youtube.com/watch?v=jZoHMi-RuUE>
2. YouTube video 'Project Management: What is a Work Breakdown Structure?' (4 minutes and 49 seconds) <https://www.youtube.com/watch?v=wEWWhnodF6ig>
3. YouTube video 'What is a project charter?' <https://www.youtube.com/watch?v=1xhQ6GJB7oY> (2 minutes and 36 seconds)
4. 'Business case template' West Virginia Office of Technology
5. 'Project charter toolkit' <http://project-charter-template.casual.pm>
6. YouTube video 'Develop project charter' <https://www.youtube.com/watch?v=3J7urtEex6c> (3 minutes and 43 seconds)
7. YouTube video 'How to Write a Project Management Charter' <https://www.youtube.com/watch?v=l4JsU42IO6g> (5 minutes and 1 second)

14.0 Module 5: Working with people

14.1 Overview of module five

People are the key to successful project outcomes



In module five we continue our journey through the planning stage of project management by focusing on project stakeholders and how to communicate effectively with them to ensure the success of the project.

The success of a project is strongly linked with your ability to develop the support, and manage the expectations of key people. Different stakeholders have different needs and concerns. Satisfied stakeholders improve the progress and relevance of a project and ultimately contribute significantly to its success.

In module five we will identify key stakeholders and work out how we'll work with them throughout the project. In doing this we will:

- Undertake a stakeholder analysis
- Develop a stakeholder management plan
- Develop a project communication plan.

14.2 What is a project management plan?

The product of the planning stage is the project management plan. The project management plan provides the road map for the implementation of the project. It is a key communication and decision-making document.

The project management plan brings together all of the components of the project charter as well as including:

- Our strategies for working with people involved and/or affected by our project
- Our strategies for managing quality
- Our strategies for managing changes.

The stakeholder management plan and communications plan are included in the project management plan which is the product of the planning stage of project management and completes the design phase of managing a project setting us up well to implement our project.

14.3 What is meant by 'stakeholders'?

Stakeholders are people who are impacted by the project and its outcomes, or who have a vested interest in the project outcomes. Further, stakeholders may change during the project and existing stakeholders may change their minds about important issues. You will not be able to prevent this but it is critical to the success of the project that you communicate effectively with stakeholders to address their concerns and inform them about the project so that they don't negatively impact on the project.

14.4 How do you work with stakeholders?

Projects are about change. Change always creates uncertainty. Consider all the people who may be affected by the outcomes of your project or who have vested interests in your project. If, for example you are replacing a manual operation on the process line with a robot the operators will of course be worried about their jobs. People are the key to successful project outcomes. Because people can influence the conduct and outcomes of your project you need to develop a plan to understand whom your stakeholders are, their interests and potential impact on your project, and how you can engage with them in a positive way to meet their needs and ensure the success of the project. Planning how to work with people is called stakeholder management. In the planning phase of project management you are developing a planned approach to engaging people/stakeholders to ensure the success of the project. Stakeholder management is a planned approach to engage stakeholders to ensure the success of the project.

14.5 How do you develop a stakeholder management plan?

The first step in developing your stakeholder management plan is to conduct an analysis of your stakeholders. We are going to use the stakeholders analysis template to conduct this activity. The stakeholder analysis template provides you with a tool to identify and develop strategies to work with each of your major stakeholders.

The stakeholder analysis template includes identification of:

- Project stakeholders
- Each stakeholders interests in the project
- Each stakeholders information needs
- Methods of communicating with each stakeholder
- Responsibilities and timelines.

14.6 How do you develop a plan to communicate with your stakeholders?

Now that you have a better understanding of the needs and concerns of different stakeholders and the methods you propose to meet those needs you need to compile all this information into a plan for

implementing the activities you've identified to communicate with each of your stakeholders. This is a communication plan. You can use your stakeholder analysis template as the basis for developing your communication plan. The communication plan includes:

- Main objective or goal of communication for the project e.g. engage with stakeholders to help ensure the success of the project.
- Key messages to stakeholders (critical that key messages be developed by whole project team so that the whole team has a shared understanding of the project)
- Key communication tools e.g. weekly meeting with project team and project sponsor
- Activity plan
- Responsibilities
- Timeframe
- Resources
- Costs
- Success criteria.

14.7 Assessment tasks for module five

There are two assessment tasks for module five. The assessment tasks are:

- Developing the stakeholder analysis for your project
- Developing the communication plan for your project.

14.7.1 Assessment task one: Developing the stakeholder analysis for your project

In the first assessment task for this module you are going to conduct the stakeholder analysis by completing the template jointly as a group. You will connect to the wiki for this task and make your contributions to the template directly into the document. You can make comments in the notes column if you wish to communicate with your colleagues in the process. In order to gain credit for this assessment task you must have made contributions to the stakeholder analysis through the wiki.

You are conducting the analysis jointly to encourage you to consider all the stakeholders their needs and concerns and how they can be met. You can use the stakeholder analysis plan developed by the group as the basis for developing your own stakeholder analysis to meet the specific needs of your own project.

14.7.2 Assessment task two: Developing the communication plan for your project

In the second assessment tasks for this module you are going to use the stakeholder analysis as the basis for developing a communication plan which you are going to jointly develop as a group. Connect to the wiki for this task and make your contributions to the plan directly into the document. In order to gain credit for this assessment task you must contribute to the communication plan through the wiki. You can use the communication plan developed by the group as the basis for developing your own communication plan to meet the specific needs of your own project.

14.8 Resources

1. YouTube video 'Stakeholder management' (6 minutes and 57 seconds)
<https://www.youtube.com/watch?v=S8-FPIbDzHY>
2. YouTube video 'Project Management PMP - Project Stakeholders' (8 minutes and 32 seconds)
<https://www.youtube.com/watch?v=Et793r7Q8fl>
3. YouTube video 'Project Stakeholder Management Plan: Managing Stakeholders Expectations!' (6 minutes and 42 seconds) <https://www.youtube.com/watch?v=0EkufUCo5ql>
4. YouTube video 'Project Management: Creating a Communications Plan' (6 minutes and 16 seconds)
<https://www.youtube.com/watch?v=DUE2GqpZbpw>



15.0 Stakeholder analysis template

| Project stakeholders | Interests of stakeholder in project | Stakeholder information needs | Communication methods | Responsibilities | Timeframes | Notes |
|---|---|--|--|------------------|---|-------|
| Example: Operators of current manual operation of task that will be replaced by robot | Threat of losing their job, whether there will be employment with the company when robot installed, what employment that will be, income etc. | Liaise with HR to understand what will happen to them and when and what their future prospects for work will be. | HR to organise individual meetings with each operator, their supervisor and HR | HR | HR meets with each operator as soon as project confirmed. Meet regularly as agreed. | |
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16.0 Communication plan template

Main objective or goal of communication for the project

e.g. engage with stakeholders to help ensure the success of the project.

Target groups

The audiences for communication

Key messages to stakeholders

(Critical that key messages be developed by whole project team so that the whole team has a shared understanding of the project)

Key communication tools

e.g. weekly meeting with project team and project sponsor, on agenda for monthly staff meetings

Communications schedule

| Objectives | Activities | Success criteria | Responsibilities | Timeframe | Resources | Costs |
|------------|------------|------------------|------------------|-----------|-----------|-------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Notes

17.0 Module 6: Managing quality and change and compiling the project management plan

17.1 Overview of module six

In this module you continue to work through the planning stage of the project life cycle developing your quality and change management plans and compiling your project management plan.



Module six includes:

- Ensuring quality throughout your project to ensure the quality of our product
- Working out how you will manage any changes to your project
- Revising and refining all of the elements you have developed to manage your project, and compiling them into your project management plans.

18.0 Managing quality

Plan to get the quality right from the start.

18.1 Why manage quality?

Failure to manage the quality of the product and process may seriously jeopardise the success of the project. If you don't measure quality as you proceed through the project you may be reduced to picking up defects at the end of the project that require expensive and timewasting re-works. Plan to get the quality right from the start.

18.2 What are the main focuses to manage quality?

There are two main focuses on quality in projects. These focuses are product quality and project quality:

- **Product quality** is about conforming to the specifications for the product so that the product meets requirements and performs to the standards required. For example the product will need to meet requirements such as customer specifications, quality, hygiene and sanitation. The robot will need to get the product right 100% of the time. It will need to maximise yield and minimise re-work of product. The robot will need to be absolutely reliable with no breakdowns that might disrupt production.
- **Project quality** is about establishing standards for your processes in managing the project. To identify quality standards to keep your project on track to the highest possible standards you can re-visit your project work plan and identify the methods of measuring and tracking quality for each of the objectives of your project.

18.3 How is quality managed?

In the planning stage of project management it is critical to develop a plan to manage product and process quality. To ensure we manage project quality and have optimal quality in the final products of our project we need to develop a plan to manage product and project quality. In order to develop a quality management plan we need to:

- Identify quality requirements or standards for the product(s) and processes.
- Monitor and audit the process quality requirements to ensure the standards and specifications are met and taking corrective actions as required (**quality assurance**).
- Check that the final product conforms to specifications and meets customer requirements (**quality control**).

18.4 How do you develop a quality management plan?

Developing the quality management plan involves:

- Identifying the standards to measure product quality and the schedule for how they'll be measured, by whom and when.
- Identifying the standards and methods of measuring the quality of the steps in the project and the schedule for how they'll be monitored, by whom and when. These can be included in your project work plan.

Your quality management plan should include:

- An outline of your approach to quality management throughout the project life cycle considering quality from process and product perspectives
- Your quality assurance standards, requirements and auditing procedures
- Your quality control specifications, process of meeting additional customer requirements and the process for measuring these.

18.5 How do you measure process quality (Quality Assurance)?

Quality assurance (QA) is a set of activities for ensuring quality in the processes by which products are developed. QA is a proactive quality process. QA is process oriented and focuses on defect prevention throughout the project. QA is about auditing the quality requirements to ensure the standards and specifications are met. The process of quality assurance includes measuring the process metrics, analysing the process data, and continuously improving the processes.

Re-visit your project work plan and identify QA activities to ensure quality in the processes of conducting your project.

Quality measures will include:

- Measures of product performance (product specifications)
- Measures of process performance
- Schedule
- Resources
- Costs
- Customer satisfaction.

18.6 How do you measure product quality (Quality Control)?

Quality control (QC) is a set of activities for ensuring quality in products. The activities focus on identifying defects in the actual products produced. QC aims to identify (and correct) defects in the finished product. QC, therefore, is a reactive process. QC is a procedure or set of procedures intended to ensure that a manufactured product adheres to a defined set of quality criteria or meets the requirements of the client or customer. QC includes documenting and recording the results of the auditing and taking corrective actions as required.

Identify the specifications and QC requirements that will measure the success of your project reflecting that your product meets specifications and customer requirements.

19.0 Controlling project changes

19.1 Why do you need to control changes to your project?

Uncontrolled change is a major cause of project failure. For example the project may be taking longer than we thought or the budget may have blown out, or the senior manager may have decided to compromise on the final product.



Earlier in this program we defined our project scope. We also mentioned scope creep which means that the product keeps changing and the way the project is conducted changes. This results in blowouts in time, resources and money and possibly the final products not meeting the agreed customer requirements. Change will take place. You need to plan how to control the changes.

We need to define a process and have procedures in place to manage any proposed changes so that the proposed changes are evaluated and strategies identified to manage them and the project sponsor signs off on the strategies

19.2 What do you need to have in place to control changes to your project?

In order to control change you need to put in place a formal change control system.

The change control system focuses on ensuring careful consideration of the change and the impacts of the change, with sign-off by the most senior decision-maker. The change control system includes a change control procedure and process. The change control system will generally be an organisational standard that is used consistently across the organisation when a change is necessary.

Changes to any project must be carefully considered and the impact of the change must be clear in order to make any approval decisions. The section should also include who has approval authority for changes to the project, who submits the changes, how they are tracked and monitored.

A change request template provides the basis for a change request procedure for consideration and sign off of proposed changes to your project. An example of a change request form that you can download can be found at <http://www.projectmanagementdocs.com/project-documents/change-request.html>.

Make a decision on the change control system for your project and include the procedure and process in your project management plan.

19.3 What are the steps in the process of making changes to the project?

The steps in the process of making changes to the project are outlined below:

20.0 Sample project change control process

| Step | Activity | Person(s) who participate in the activity |
|--------|--|---|
| Step 1 | Identify the need for a change Any team member or stakeholder may submit a change request The person requesting a change submits a completed change request form to the project manager | Any team member or stakeholder |
| Step 2 | Log the change in the change request register The project manager logs the change in the change request register. The project manager maintains the change request register which is a log of all change requests for the project | Project manager |
| Step 3 | Conduct an assessment of the change The project manager conducts an assessment of the impact of the change to cost, risk, work plan and scope | Project manager, project team, requestor |
| Step 4 | Submit change request | Project manager |

| | | |
|--------|---|---|
| | The project manager submits the change request and analysis to the senior manager who is authorized to make decisions for review | |
| Step 5 | Make decision on change The senior manager with authority discusses the proposed change and decides whether or not it will be approved based on all submitted information | Senior manager with authority to make decisions |
| Step 6 | Implement change If a change is approved, the project manager updates the project documentation and informs the team and stakeholders as required | Project manager |

21.0 Compiling the project management plan

21.1 How do you compile the project management plan?

The planning stage of the project life cycle has been about the project manager working with the project team to plan the project to ensure successful outcomes and how those outcomes will be achieved.

In this module we bring together all the products of the previous modules into the project management plan. This is the final product of the planning stage of the project life cycle.

The project management plan explains the why, what, how, who and when of the project.

Bring all of the parts of your project management plan together following the project management template included or your organisation’s project management template.

Once you have compiled your project management plan re-visit each part of the plan and revise the plan reflecting new insights when you read the plan as a whole.

For example, you may need to reflect the outcomes of your stakeholder analysis in your risk management plan by highlighting the need to add an additional risk associated with failing to adequately engage stakeholders.

21.2 How do you involve your project team in the planning stage?

Your project management team is your greatest asset. They need to come on the journey with you in regard to the entire project. Consult and involve them with the project management plan. Walk them through each part of the plan and invite their input into the plan so they take ownership, are involved and feel that they’ve made their contribution to the plan.

21.3 Assessment tasks for module six

There are two assessment tasks for module six. They are:

- Developing your quality management plan
- Compiling revising, finalising and submitting your project management plan for assessment for this program.

21.3.1 Assessment task one: Developing your quality management plan

Your quality management plan should include:

- An outline of your approach to quality management throughout the project life cycle considering quality from process and product perspectives
- Your quality assurance standards, requirements and auditing procedures

- Your quality control specifications, process of meeting additional requirements eg servicing and breakdown, and the process for measuring these.

21.3.2 Assessment task two: Compiling, revising, finalising and submitting your project management plan for assessment for this program

Compile, revise, finalise and submit your project management plans for assessment for this program and for approval by your project sponsor.

Congratulations.

The project management plan is the culmination of all of your work throughout this program and the final product of the design phase of the project.

The project management plan places you in the best possible position to be able to implement your project and successfully achieve the planned outcomes.

21.4 Resources

1. YouTube video 'How to Meet Your Quality Targets - Project Management' (4 minutes and 37 seconds) <https://www.youtube.com/watch?v=TDjORBjYAdk>
1. 'Change request form' that you can download can be found at <http://www.projectmanagementdocs.com/project-documents/change-request.html>
2. YouTube video 'The Project Management Plan - Part 1' (9 minutes and 27 seconds) <https://www.youtube.com/watch?v=1KoEEuwOCRo>
3. YouTube video 'Develop Project Management Plan' (4 minutes and 16 seconds) <https://www.youtube.com/watch?v=9UYy1fgbLJA>

22.0 Project management plan template

Project title

Background

This section should provide a brief description of how the project came about.

Project goal

Project scope

The project scope is the most critical section of the PMP. The scope must include what the project does and does not cover. The more detail included in this section, the better the product. This will help to clarify what is included in the project and help to avoid any confusion from project team members and stakeholders.

Product description

Specifications for the final product of the project

Reasons for the project

The reasons why the problem exists.

Advantages of the proposed new technology

Disadvantages of the proposed new technology

Impacts of the proposed new technology

Project risk management plan

Project SMART goals/objectives

Project success criteria

Project work plan

Project budget

Project cost management plan

The project cost management plan clearly defines how the costs on the project will be managed throughout the project's lifecycle. It sets the format and standards that the project costs are measured, reported, and controlled.

It is critical for all project team members to work within the cost management guidelines to ensure successful completion of the project.

Project change control process

This section describes the change control process and procedures. This process will generally be an organisational standard that is used consistently across the organisation when a change is necessary.

Changes to any project must be carefully considered and the impact of the change must be clear in order to make any approval decisions. The section should also include who has approval authority for changes to the project, who submits the changes, how they are tracked and monitored.

Project stakeholder analysis

Project communication plan

The communication plan sets the communications framework for this project. It serves as a guide for communication throughout the life of the project and will be updated as communication requirements change. This plan identifies and defines the roles of the project team members in regard to communications and includes a schedule for communications in regard to the project.

Project sign-off

Name of project sponsor:

Signature of project sponsor:

Date:

23.0 Module 7: Establishing the project

23.1 Overview of module seven



At the beginning of this program we began our journey through the design phase of project management by looking at a systematic process for managing the design of your projects. The stages that we identified in the design phase of project management are:

- Define or initiate the project
- Plan the project.

The products of the design phase of the project management life cycle are:

- The project charter or business case
- The project management plan (PMP).

Your work to plan your project and develop your project management plan places you in the best position for the success of your project. Having developed your project management plan and gained approval from your project sponsor to proceed with the project, you are now transitioning to project implementation or execution. In this module we are going to look at what you need to do to transition successfully to project implementation.

One of the reasons why we start to look at the implementation stage in this program on project design is that 'establishing the project' is one of the requirements for the unit of competency 'Design complex projects.'

The activities that need to take place in project start up include:

- Meeting with the project team to go through the PMP and start the discussion about how the project team will operate and how individuals in the team will be managed
- Initiating the communications plan by informing stakeholders
- Organising meetings with individual project team members to start the performance management process by identifying their roles and responsibilities in the project and working with each team member to develop individual work plans
- Beginning the process of procuring resources
- Identifying and establishing infrastructure
- Setting up the project support
- Ensuring project governance is in place.

23.2 What do you need to do to establish and manage the project team?

It is critical to the success of the project, that the project is adequately resourced by staff with the time and competencies to commit to the project. If staff take on project duties in addition to their normal operational responsibilities they may not have sufficient time to commit to the project and this may jeopardies the success of the project. Negotiate from the planning stage for project team members to have

dedicated time to meet their project responsibilities. The project team needs to be familiar with the project management plan and their role and responsibilities in meeting the plan. Each member of the project team should have been consulted throughout the planning stage of project management so that they have provided input and feedback into the development of the PMP and are familiar with their roles and responsibilities, what is involved in meeting them, the roles of other team members and are committed to the project. The project manager needs to hold a start up meeting to go through the final PMP and ensure the whole team are familiar with the plan and how the team will work together to achieve the goals. The project manager needs to hold regular meetings with the project team. The purpose and frequency of team meetings should be discussed and decided at the team start up meeting.

Members of the project team are selected on the basis of the skills requirements for the project. This can be determined from the project work plan (which is part of the PMP). Project responsibilities need to be allocated to personnel by developing individual work plans with each project team members or incorporating project responsibilities into the individual work plans of project team members who are working part-time on the project.

It is critical to the success of the project for each member of the project team to be very clear about their role and responsibilities in regard to the project.

The project manager needs to meet with each member of the project team and use the project management plan as the basis for developing individual work plans with each of the project team members. There may also be training that needs to be undertaken for the team members to achieve their goals. The work plan includes:

- Objectives, activities and timelines for completion
- Milestones that measure achievement of the objectives
- Training needs and how they will be met.

Each team member then knows exactly what their roles and responsibilities are, when they are expected to achieve them and the success criteria they will be measured by. The project manager and each team member should also work out how frequently they'd like to meet to discuss progress and make any adjustments.

23.3 What is involved in an initial start up meeting with the project team?

The initial, start up meeting with the project team should include:

- Introductions and welcome to team members
- Review of the project management plan going through all the components of the plan and encouraging discussion
- Discussion of the roles and responsibilities of each member of the team
- Overview of the activities that need to be commenced and who is responsible for each and discussion of how they will proceed
- Discussion of team meetings – their purpose, the way they will be conducted and recorded, and frequency of meetings
- Planning the agenda for the next meeting.

23.4 How do you communicate with stakeholders?

Effective communication is critical to the success of the project. Your stakeholder analysis and communications plan set out the process of communicating with stakeholders. This plan now needs to be initiated so that all stakeholders are informed of project start up.

23.5 What do you do to begin the procurement process?

The project work plan of the project management plan includes the resources that need to be purchased to support the project as well as the project team member who is responsible for making those purchases.

Your organisation will have procurement procedures that need to be followed to order resources and procure items. The project manager needs to ensure that the team member is aware of and following these procedures.

23.6 How do you ensure you are meeting project governance requirements?

The project manager is responsible for ensuring all your organisation's processes and procedures are followed for project governance. This essentially means that the project manager should be ensuring that the project is conducted in accordance with the project management plan and the company's policies and procedures. The company's policies and procedures include compliance with:

- All human resources policies and procedures
- All financial management policies and procedures
- All relevant standard operating procedures (SOPs) and work instructions
- All work health and safety policies and procedures
- All quality assurance requirements
- All hygiene and sanitation requirements.

23.7 Assessment tasks for module seven

This module has focused on transitioning to the implementation stage of the project looking at what is required to start up the project.

The assessment tasks for this module are submission of some of the products of start up. As assessment for this module you need to submit:

- A work plan for one of your project team
- The minutes of a project team meeting
- One of the communication items from your communications plan, eg a start up email to stakeholders, project bulletin or newsletter

23.8 Resources

1. YouTube video 'Project Kick Off Guide: 4 Essential Steps On How To Kick Off A Project' (5 minutes and 31 seconds) <https://www.youtube.com/watch?v=qxjuo4Vnp6U>
2. YouTube video 'Your Project Kickoff Meeting Checklist' (3 minutes and 54 seconds) <https://www.youtube.com/watch?v=LOcKv-mENq8>

23.9 Review of program

You have now completed your journey through the design phase of project management with:

- The production of your project charter or business case for your project
- The production of your project management plan.

You have also completed your project start up. You and your team are now equipped to undertake the project.

If you have completed all modules of this program and all your assessment tasks you will also have complied with the requirements for the 'Design complex projects' unit of competency.

Congratulations and I wish you well with your project.



