

Texas Department of Information Resources  
Presents

# PM LITE 2.0

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PROCESSTRAINING

# PM LITE 2.0: Project Management Process

PM Lite (Project Management Lite) is a project management process made up of tools, templates, and best practices that empowers its users to be more efficient and effective in project delivery regardless of project size or complexity.

In PM Lite's most recent release (PM Lite 2.0) DIR's PPMO simplified Project Management Institutes (PMI) project management processes facilitating a "liter", and easy to use, toolset that aligns to a global standard.

The Program and Portfolio Management Office (PPMO) at DIR have created the PM Lite process to help enable state and local entities to achieve their core missions through successful project delivery. PM Lite is an optional process. Using these tools and templates can help your organization achieve project consistency, standardization, and project success.

# PM LITE 2.0: Processes, Tools, and Templates

## Processes

- Process Documentation

## Tools

- PM Lite 2.0: Process Training
- Glossary
- Best Practices

## Templates

- Business Case\*
- Project Charter\*
- Project Management Plan
- Requirements Document
- Milestone Timeline
- Project Register\*
- Project Schedule\*
- Meeting Notes
- Status Reports
- Project Change Request
- Lessons Learned\*
- Project Closure\*

\* Highly Recommended

# PM Lite 2.0 Process



<sup>^</sup> Portfolio Review is an Internal DIR Process.

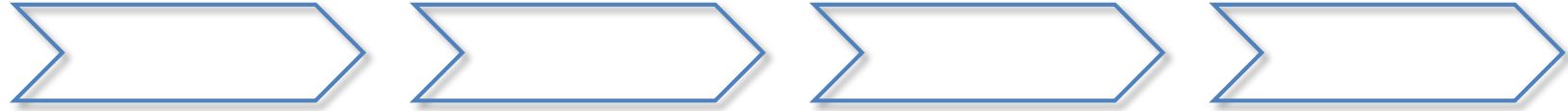
\* Highly Recommended Templates

# Portfolio Review (Pre-Initiation)

TEMPLATE

Business Case

The Portfolio Review is a DIR internal process for prioritizing, aligning, and evaluating project requests. When the business idea is submitted by the Project Sponsor the Portfolio Review Board reviews and assigns the project idea to a Project Manager based on prioritization and strategic alignment.



# Business Case

## PURPOSE

The Business Case defines the business need along with the necessary information, from a business standpoint, to determine whether or not the project is worth the required investment. It demonstrates alignment to business and strategic objectives and is used to prioritize the project among other project demands.

## HOW TO USE

The Project Sponsor or Business Owner submits this template. This template will address the business issue and the expected business outcome as well as the key resources necessary for the project. It defines how the project will align to the goals of the agency and/or state.

## BEST PRACTICE

Business Cases should be approved by division directors, aligned to business and strategic objectives, and prioritized among other business/project demands.

# INITIATION

The Initiation Phase reviews the business idea and turns it into a formal project.

## TEMPLATES

Project Charter



- Project Charter



# Project Charter

## PURPOSE

The Project Charter officially authorizes the project and allocates resources. The chartering process forms the project core team and officially kicks off the project.

## HOW TO USE

The Charter is where you will define a project scope, create an estimated timeline, and establish a project budget. Once this document has been completed and approved, the Initiation Phase closes and the project moves into the Planning Phase.

## BEST PRACTICE

Project Charters should be developed cooperatively with the project core team and approved by the Project Sponsor, Business Owner, and resource owners.

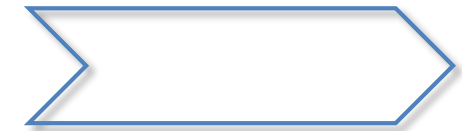


# PLANNING

The Planning Phase develops the approach and schedule for delivering the project. The triple constraint (Scope, Schedule, and Cost) is finalized in the Planning Phase. The project team is formalized and the communications plan and project deliverables are identified.

## TEMPLATES

- Project Management Plan
- Requirements Document
  - Project Schedule
- Milestone Timeline



- Project Management Plan
- Requirements Document
- Project Schedule
- Milestone Timeline

# Project Management Plan

## PURPOSE

The Project Management Plan defines "how" the project is executed, monitored and controlled, and closed.

## HOW TO USE

This template lays out a plan and strategy for "how" the project will be executed. The Project Charter defines the "what" while the Project Management Plan defines the "how".

## BEST PRACTICE

Use the Project Management Plan to set project team expectations, define project quality indicators, and define other subsidiary plans such as communication management, risk management, requirements management, schedule management, and change management.



- Project Management Plan
- **Requirements Document**
- Project Schedule
- Milestone Timeline

# Requirements Document

<b>PURPOSE</b>	The Requirements document details specific project and product requirements that must be met to satisfy the business objectives.
<b>HOW TO USE</b>	This template provides a mechanism to track product/project deliverables against requirements to ensure business and product requirements are met.
<b>BEST PRACTICE</b>	Requirements may start out at a high level and become progressively more detailed as more information is known. Requirements must be unambiguous (measurable and testable), traceable, complete, consistent, and acceptable to key stakeholders. A requirements management plan should be defined to document how requirements will be captured, measured, analyzed, and managed.



- Project Management Plan
- Requirements Document
- **Project Schedule**
- Milestone Timeline

# Project Schedule

		Ti M	% Co	Task Name	Duration
1			0%	▲ Official Project Start	22 days?
2			0%	▲ Initiation	6 days?
3			0%	Review Business Case Request (BCR) & Pre-Project Ass	1 day?
4			0%	Review Lessons Learned Repository	1 day?
5			0%	Create Project Charter	1 day?
6			0%	Create Project Schedule (.mpp) & Baseline	1 day?
7			0%	Milestone: Obtain approval on Project Charter	1 day?
8			0%	Milestone: Conduct Project Kickoff	1 day?
9			0%	▷ Planning	8 days?
18			0%	▷ Execution	4 days?
23			0%	▷ Close	4 days?
29			0%	Project Formally Completed	0 days

\*Also available in Excel format.

## PURPOSE

The Project Schedule Template is created to help plan and track important dates within the project.

## HOWTO USE

The Project Schedule Template is pre-configured to align to standard Project Management life cycle processes. There are two versions of the PM Lite 2.0 Project Schedule Template. One is a Microsoft Project and the other an Excel spreadsheet. Pick the tool that works best for your project and organization. The project schedule allows you to plug in dates, resources, and budget information. Once populated with dates and resources, key performance indicators (KPIs) such as schedule variance and % complete, can then help track the project performance.

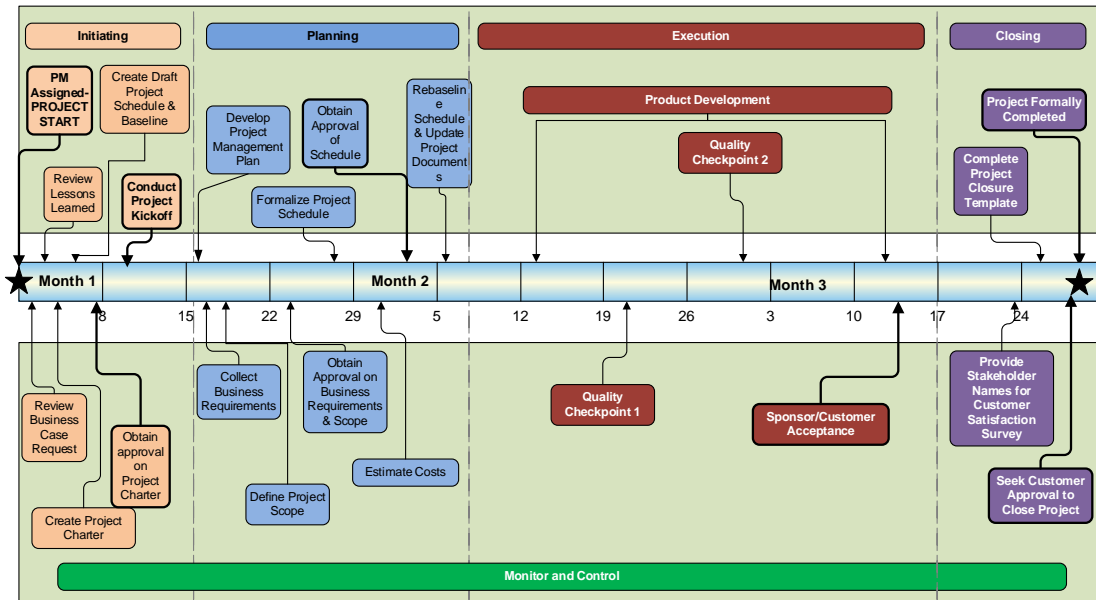
## BEST PRACTICE

Prepare a tentative project schedule in initiation and adjust throughout the life of the project. Baselining a project schedule should occur at the conclusion of planning but may occur in initiation and re-baselined at conclusion of planning dependent on organizations policies and project details. In an effort to capture project metrics (e.g. schedule variance) and continuously improve, all project schedules/plans should be baselined. The project schedule should be used as the single source of truth regarding project schedules, baselines, and project variances.

## Planning

- Project Management Plan
- Requirements Document
- Project Schedule
- Milestone Timeline

# Milestone Timeline



## PURPOSE

The Milestone Timeline is used as a “visual” representation of the schedule for key project deliverables and milestones. The Milestone Timeline is beneficial for presenting a visual schedule for the project.

## HOW TO USE

A Milestone Timeline can be created using MS Visio, a diagramming application. Once a project schedule is created the key deliverables and milestones should be mapped and aligned to the “visual” milestone timeline according to when they will occur in the project.

## BEST PRACTICE

Align key milestones and deliverables to the visual representation so the information in both the Microsoft Project Plan and the Visio are aligned and telling the same story. The visual representation is a good tool to use in presentations as a communication tool.

# EXECUTION

In the Execution Phase, the project plan is worked, the project deliverables are completed, and the project is implemented or “goes live.” The Execution Phase is where the work defined in the Project Charter is performed to satisfy the project objectives.

## TEMPLATES

All Project Tools

# MONITORING & CONTROLLING

The Monitoring & Controlling Phase of the project is an overarching phase that commences in the Initiation Phase and extends through Project Closure. Templates included in the Monitoring & Controlling phase include reporting, tracking, and communication tools to ensure successful project delivery.

## TEMPLATES

- Project Register
- Meeting Notes
- Status Reports
- Project Change Request

## Monitoring and Controlling

- Project Register
- Meeting Notes
- Status Reports
- Project Change Request

# Project Register

### PURPOSE

The Project Register is a tool that can be used to capture and track key project information, making it easier to monitor, control, and track project details throughout the life of the project.

### HOW TO USE

The Project Register can be used to track action items, decisions, deliverables, risks, issues, stakeholder contact information, and more.

### BEST PRACTICE

The Project Register should be updated regularly throughout the life of the project to ensure that all information is kept up to date. Share the Project Register with your project core team where appropriate as a means of keeping the core team apprised of key project information.



## Monitoring and Controlling

- Project Register
- Meeting Notes
- Status Reports
- Project Change Request

# Meeting Notes

### PURPOSE

The Project Meeting Notes Template is used to document and communicate notes for all project meetings.

### HOW TO USE

The Meeting Notes Template is meant to be utilized at all project meetings to document the meeting agenda, action items, decisions made in the meeting, who attended the meeting and scheduling the next meeting.

### BEST PRACTICE

If notes are extensive, create a high-level summary section that is briefer. Project notes should be distributed in a timely fashion (one business day) to all project core team members, the Business Owner, the Project Sponsor, and other project participants.

## Monitoring and Controlling

- Project Register
- Meeting Notes
- **Status Reports**
- Project Change Request

# Status Reports

### **PURPOSE**

The Status Report is utilized for communicating the overall health of the project to the project core team and key project stakeholders to keep everyone abreast of project progress.

### **HOW TO USE**

The Status Report communicates key performance indicators (KPIs), key project dates, and key risks/issues related to the project in order to keep all project players equally informed.

### **BEST PRACTICE**

Status Reports should be brief, regular, clear, and should demonstrate overall project health; reporting Key Performance Indicators (KPI's) such as, % Complete, Red, Yellow, Green and Schedule Variance. Project status should be communicated weekly or bimonthly to keep members informed.

## Monitoring and Controlling

- Project Register
- Meeting Notes
- Status Reports
- Project Change Request

# Project Change Request (PCR)

### PURPOSE

The Project Change Request (PCR) is used by the Project Manager to request a change to the project scope, schedule, costs, project milestones and/or deliverables.

### HOW TO USE

Use this form to document major changes in the project that impact scope, schedule, costs, quality, or key project performance and health. This form should NOT be used to manage daily operational project management, project monitoring and control activities, as doing so will add significant overhead to the project management activities.

### BEST PRACTICE

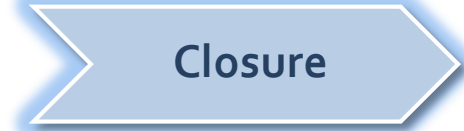
Potential impact of a change on project scope, schedule, and costs should be communicated to the core team. A change to the project baseline should require a Project Change Request (PCR). Each PCR should be approved by PPMO Director, Project Sponsor, and Business Owner. A PCR should first be presented/discussed with the core team and approved by the core team then approved by the Project Sponsor, and lastly the PMO/PPMO or Portfolio Manager or Director.

# CLOSURE

In the Project Closure Phase, the project artifacts are archived in the project repository, the project activities are completed, and the project transitions to operational status.

## TEMPLATES

- Lessons Learned
- Project Closure



- Lessons Learned
- Project Closure

# Lessons Learned

## PURPOSE

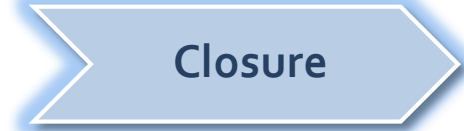
The Lessons Learned document is used to identify and preserve the lessons learned on each project. The purpose of this document is to help the project team share knowledge gained from the experience. A successful Lessons Learned program will help project teams repeat desirable outcomes and avoid undesirable outcomes.

## HOW TO USE

Populate the Lessons Learned document using Project Register information and any other pertinent project artifacts as well as project team feedback obtained through any lessons learned brainstorming.

## BEST PRACTICE

Lessons Learned are more accurate if they are tracked throughout the life of the project rather than waiting until the end. Lessons Learned should be reviewed and approved by the Project Sponsor, Business Owner, and/or Division Director. All other members of the project core team should review Lessons Learned.



- Lessons Learned
- Project Closure

# Project Closure

<b>PURPOSE</b>	The Project Closure document formalizes the completion of the project.
<b>HOW TO USE</b>	The Project Closure Template documents confirmation that all in scope business objectives have been met and necessary project items have been finalized. This includes making sure all listed project deliverables have been completed and project documentation saved in suitable shared storage. This template also allows you to document any outstanding actions/issues are to be handled.
<b>BEST PRACTICE</b>	Project Closure approval is needed by the Project Sponsor, Business Owner, and the PPMO/PMO Director to demonstrate approval of project closure and agreement that business objectives have been met. It is important to demonstrate that the deliverables have met the business objectives in the closure document, as well as identify unmet deliverables.

# PM Lite 2.0 Process



<sup>^</sup> Portfolio Review is an Internal DIR Process.

\* Highly Recommended Templates

# The PMBOK Guide: Project Management Body of Knowledge

The Project Management Institute's (PMI) global standards provide guidelines, rules and characteristics for project, program and portfolio management. This information is encompassed in 'A Guide to the Project Management Body of Knowledge' also called the PMBOK Guide. PMBOK recognizes **5 process groups** (what we refer to as phases) and **10 knowledge areas**, these create their **47 Project Management processes**. These global standards are what PM Lite's tools, templates, and processes are derived from.

Knowledge Areas	Project Management Process Group				
	Initiating Process Group	Planning Process Group	Executing Process Group	Monitoring and Controlling Process Group	Closing Process Group
Project Integration Management	<ul style="list-style-type: none"> <li>Develop Project Charter</li> </ul>	<ul style="list-style-type: none"> <li>Develop Project Management Plan</li> </ul>	<ul style="list-style-type: none"> <li>Direct and Manage Project Work</li> </ul>	<ul style="list-style-type: none"> <li>Monitor and Control Project Work</li> <li>Perform Integrated Change Control</li> </ul>	<ul style="list-style-type: none"> <li>Close Project or Phase</li> </ul>
Project Scope Management		<ul style="list-style-type: none"> <li>Plan Scope Management</li> <li>Collect Requirements</li> <li>Define Scope</li> <li>Create WBS</li> </ul>		<ul style="list-style-type: none"> <li>Validate Scope</li> <li>Control Scope</li> </ul>	
Project Time Management		<ul style="list-style-type: none"> <li>Plan Schedule Management</li> <li>Define Activities</li> <li>Sequence Activities</li> <li>Estimate Activity Resources</li> <li>Estimate Activity Durations</li> <li>Develop Schedule</li> </ul>		<ul style="list-style-type: none"> <li>Control Schedule</li> </ul>	
Project Cost Management		<ul style="list-style-type: none"> <li>Plan Cost Management</li> <li>Estimate Costs</li> <li>Determine Budget</li> </ul>		<ul style="list-style-type: none"> <li>Control Costs</li> </ul>	
Project Quality Management		<ul style="list-style-type: none"> <li>Plan Quality Management</li> </ul>	<ul style="list-style-type: none"> <li>Perform Quality Assurance</li> </ul>	<ul style="list-style-type: none"> <li>Perform Quality Control</li> </ul>	
Project Human Resources Management		<ul style="list-style-type: none"> <li>Plan Human Resource Management</li> </ul>	<ul style="list-style-type: none"> <li>Acquire Project Team</li> <li>Develop Project Team</li> <li>Manage Project Team</li> </ul>		
Project Communication Management		<ul style="list-style-type: none"> <li>Plan Communications Management</li> </ul>	<ul style="list-style-type: none"> <li>Manage Communications</li> </ul>	<ul style="list-style-type: none"> <li>Control Communications</li> </ul>	
Project Risk Management		<ul style="list-style-type: none"> <li>Plan Risk Management</li> <li>Identify Risks</li> <li>Performance Qualitative</li> <li>Risk Analysis</li> <li>Perform Quantitative Risk Analysis</li> <li>Plan Risk Analysis</li> </ul>		<ul style="list-style-type: none"> <li>Control Risks</li> </ul>	
Project Procurement		<ul style="list-style-type: none"> <li>Plan Procurements</li> </ul>	<ul style="list-style-type: none"> <li>Conduct Procurements</li> </ul>	<ul style="list-style-type: none"> <li>Control Procurements</li> </ul>	<ul style="list-style-type: none"> <li>Close Procurements</li> </ul>
Project Stakeholder Management	<ul style="list-style-type: none"> <li>Identify Stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Plan Stakeholder Management</li> </ul>	<ul style="list-style-type: none"> <li>Manage Stakeholder Engagement</li> </ul>	<ul style="list-style-type: none"> <li>Control Stakeholder Engagement</li> </ul>	