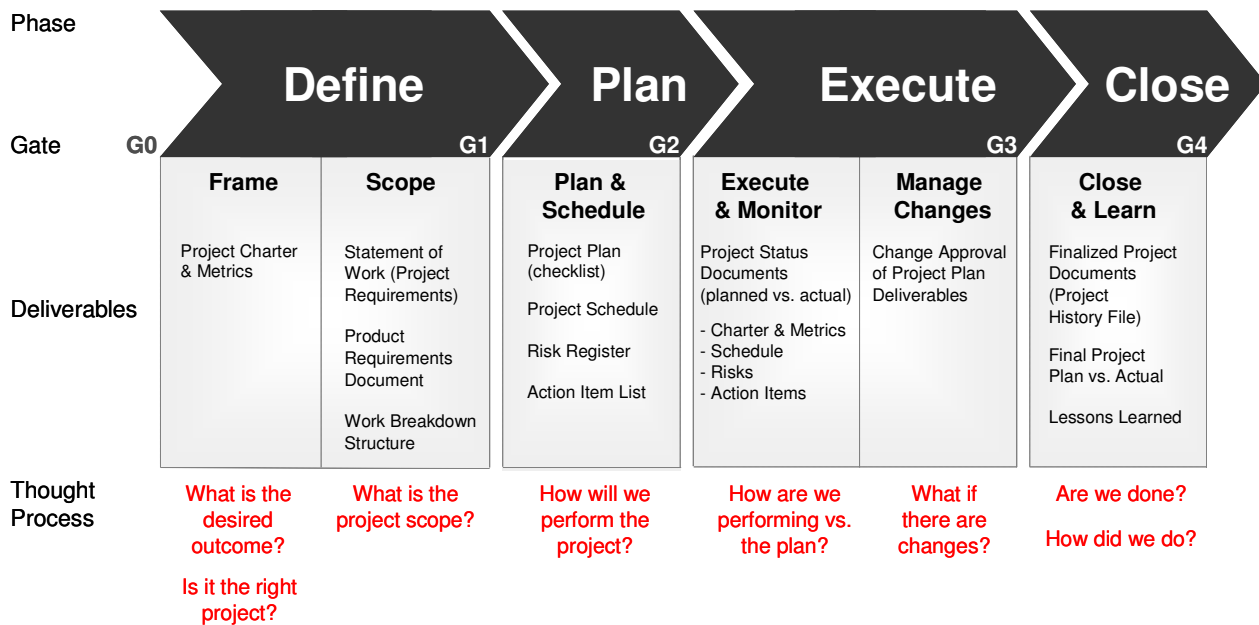


Many organizations responsible for executing projects would benefit from a simplified project management process. In particular, organizations without full-time project managers often struggle to apply project planning and project management fundamentals.

While project management is a respected discipline, with generally accepted practices per the Project Management Institute, the Project Management Body of Knowledge (PMBOK) has swollen to over 500 pages. This level of detail and complexity makes it difficult to absorb and apply for part-time project managers with no formal training.

With this in mind, project management can be effectively taught and applied using the following (simplified) phases, review gates and deliverables:



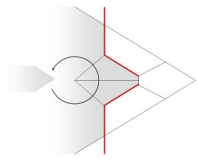
**Gate 0** – initiates the project management process and enables review and approval of the opportunity before definition begins. The project opportunity can be formal or informal, and could be facilitated by a simple project request form (which includes certain elements of the project charter).

**Define Phase** – the charter frames the project and clarifies the measures (metrics) of project quality including business case (project cost, financial benefit). It is reviewed and approved by the project sponsor. Scope definition consists of project and product requirements in addition to the work breakdown structure (WBS). WBS is usually performed in the planning phase; however, because of the importance of this planning tool, it makes sense to have the WBS available for G1 review and approval.

**Gate 1** – enables the review and approval of project scope and ensures the project manager is ready for the planning phase.

**Plan Phase** – the project plan in this simplified process is facilitated by a checklist of questions to ensure various planning elements are in place. Response(s) to the checklist questions that are project risks or require an activity to be performed can be accommodated in the project schedule, risk register and/or action item list. Also, any changes/updates to define phase documents should also be highlighted in preparation for gate review.

**Gate 2** – ensures the plan is complete and the project is ready to begin. G2 approval can be combined with the project kickoff meeting.



**Execute Phase** – perform the activities and complete the deliverables as required by the statement of work, product requirements and project schedule. Monitor project performance vs. cost, scope and schedule planned vs. actual. Project status should also highlight recent accomplishments and help needed from the stakeholders by the project team. Periodic project review meetings might be required until the team is ready for Gate 3.

**Gate 3** – ensures the project is complete and that full and satisfactory acceptance by the internal and external customers has been received. A review of revised resource assignments should also be performed.

**Close Phase** – complete the project history file and any outstanding action items from Gate 3. Complete a retrospective analysis and identify lessons-learned.

**Gate 4** – ensures the project is completely closed and lessons learned are known and available to be applied to future projects.

This simplified process enables reviews and minimizes the number of project planning deliverables. Each deliverable can be established in the form of a template, tool or example (standardized work), which gives the project manager a ‘head-start’ in managing the project. As with any standardized work, these templates/tools/examples are also a vehicle for implementing lessons learned and continuous improvement.