

[Company Name]

Project Management Quick Reference Guide

Stage	Description
Project Definition	<p>A project is a complex series of non-routine tasks directed to meet a specific one-time goal. The project manager works to:</p> <ul style="list-style-type: none"> ▪ Balance project <u>scope</u> ▪ Identify <u>timeline</u> to carry out the project ▪ Identify the <u>budget</u> available for the project.
Initiate	<p>The Initiating stage of project management includes examining the strategic fit for a proposed project. Before beginning a new project, an organization must determine that the project fits in with its strategic goals. Understanding the organization's goals can help executives identify certain proposed projects focusing on mission-critical activities as high-priority, and other projects peripheral to organization goals as lower priority. During the Initiating stage, an executive sponsor should be identified. A high-level evaluation of the project's business case should be developed, along with project limitations and technical and financial requirements. A project manager should be identified.</p>
Planning	<p>The Planning stage devises a workable scheme to accomplish the project's intended goals and outcomes. In the Planning stage, you identify the project's milestones, deliverables, and tasks. This plan can be your work breakdown structure (WBS). You develop and refine the schedule, and identify the resources needed to implement the project.</p> <p style="padding-left: 40px;">Create a new plan</p> <ol style="list-style-type: none"> 1. Enter tasks 2. Outline tasks 3. Enter durations 4. Specify task dependencies <p style="padding-left: 40px;">Define and assign resources</p> <ol style="list-style-type: none"> 1. Define the resource pool 2. Assign resources to tasks <p>Set the project baseline: This will be the control for your project to keep you on track and control scope. After your project plan is optimized for finish date, budget, and scope, you can submit the plan for approval.</p>

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Execute and Control	<p>The Executing/Controlling stage coordinates people and other resources to carry out the plan as defined in the project plan. The deliverables in this stage focus on managing change, entering schedule updates, tracking progress, and communicating project information. Each team member performs defined tasks within the project scope, ensuring their contribution to the project's success.</p> <p>Track progress</p> <ol style="list-style-type: none">1. Manage changes - Modify durations, dates, dependencies, resource assignments, or tasks based on requested changes or new information.2. Track actual dates and durations - It's best to decide on a single method for tracking progress. You can enter percentage complete, actual start and finish dates, actual and remaining durations, or actual and remaining work. Select the task for which you want to enter actual progress.3. Track actual hours and costs <p>Communicate project information – Constant communication to team member and executive sponsors is important to a successfully project.</p>
Completion	<p>The Completion stage includes final details for completing a project. Resolve any final project details, and obtain customer acceptance of final deliverables. Conduct a Lessons Learned session, recording information about areas for improvement and best practices. Make any final updates to the project plan. Finally, archive the project plan and all project documents according to your organization's project data archival guidelines.</p>