Project Management Life Cycle (PMLC)
Project Management Life Cycle (PMLC) Introduction

PMLC Working Group

- IT Business Process Management (BPM)
- IT Project Management Office (PMO)
- Finance System Support (FSS)
- Business Management and Analysis Group (BMAG)

PMLC Working Group Goal

Employ a Project Management Life Cycle Process for strategic system or process implementation projects, intended to drive standardization of methodology, documentation, reporting and approval across GW organizations, while enabling clear ownership and empowerment of project leadership.
Key Components for Cross-Functional Coordination

- Utilize gate structure to achieve buy-in / approval at key points in the process
- Phase gate reviews consisting of cross-organizational senior management and key stakeholders
- Mandate assignment of a single empowered project manager prior to initiation of a project
- Require documentation which may otherwise be delayed or disregarded
- Standardize status reporting for Senior Management review
Project Management Life Cycle (PMLC) Responsibility Overview

**Project Owner**
Director-level accountable owner of the solution

**Process Initiator**
Manages request analysis

**Project Manager**
Manages overall project team

**IT PMO**
BMAG
Functional Area
Other

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**Request**
- Idea
- Proposal

**Chartered Project**
- Planning
- Analysis Design & Development
- Testing & Readiness
- Cutover / Post Go Live
- Closing

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**IT Project Lead**
- IT Resources

**“Customer” / Functional Lead**
- Functional Group Resources

**Vendor / Third-Party Lead**
- Vendor Deliverables

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~ Clearly identify and communicate roles in the beginning ~
# Role & Responsibility Definitions

<table>
<thead>
<tr>
<th>Role</th>
<th>Group</th>
<th>Responsibility</th>
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</table>
| Project Executive Sponsor | – Any                  | • Executive leader who has sanctioned the project  
• Monitor overall progress of the project at a high level  
• Assist Project Owner in escalations when necessary |
| Project Owner          | – Any                  | • Accountable director-level leader responsible to Executive Sponsor for delivery of solution  
• Ensure committed resources for the project and assemble the project team, including Project Manager  
• Provide regular decision making and direction for the project  
• Manage the overall timeline at a milestone level |
| Process Initiator      | – IT BPM  
– BMAG  
– Functional Group | • Manager of the *Idea & Proposal Phases*  
• Discovery and qualification of incoming requests  
• Create Idea Summary, Proposal and Charter documentation  
• Coordinate Idea & Proposal Gate Review Board reviews |
| Project Manager        | – IT PMO  
– BMAG  
– FSS  
– Functional Group | • Accountable manager of project execution from *Planning* through *Closing Phases*  
• Hold regular project reviews with project owner and leads  
• Coordinate dependencies across the entire project  
• Manage PMLC documentation from *Planning* through *Closing Phases*  
• Direct appropriate Gate Review Board reviews  
• Manage the detailed schedule and timeline for the entire project  
• Regularly report status to Project Owner |
| Project Lead(s)        | – IT PMO  
– FSS  
– BMAG  
– Functional Group  
– Vendor | • Owner of a related piece of a project from their respective area  
• Coordinates functional & technical resources to complete tasks  
• Supports Project Manager in developing and maintaining applicable PMLC/PMO documentation  
• Provides regular status of project to Project Manager |
Project Management Life Cycle (PMLC)

Idea Phase Overview

• Define the project through development of the Project Request Form / Idea Summary
• Quickly review idea, request or mandate to summarize details
• Ensure synchronization with University strategy and applicability to PMLC
• Effort < 40 staff hours

Key Participants

• Process Initiator (IT BPM / BMAG / Functional Lead)
• Functional Owner / Requestor

Required Deliverables

- Project Request Form / Idea Summary

Activities

✓ ID initial stakeholders
✓ Define business need
✓ Perform initial high-level cost / benefit analysis
✓ Ensure support from stakeholder VPs
✓ Determine Initial Gate Reviewers
Project Management Life Cycle (PMLC) Proposal Phase Overview

- Propose solution(s) which best solve the business need
- Prepare project charter to initiate the Planning phase
- Assign the overall Project Manager
- **Effort < 120 staff hours** (although variable by project)

### Key Participants
- Process Initiator (IT BPM / BMAG / Functional Lead)
- Functional Owner / Requestor

### Required Deliverables
- **Proposal**
  - Business case, including cost / benefit analysis
  - Initial budget requirements & funding source identification
  - Preliminary Security review
- **Contract Ts & Cs (if required)**
- **Business Requirements**
- **Project Charter**

### Activities
- ID and engage stakeholders
- Develop Proposal
- Preliminary IT security / compliance review
- Gather contract Ts & Cs
- Begin Business Requirements Gathering
- Develop Project Charter

### Post Gate Review Approval:
- Proposal approved & signed
- Project Charter signed
- Budget approved
- Project Manager assigned
Project Management Life Cycle (PMLC) Planning Phase Overview

- Develop the plan for the solution to be implemented
- Engage the project team and begin resource / task planning
- Ensure initial security checklist and review is completed successfully
- Effort duration variable per project

**Key Participants**
- Project Owner
- Project Manager
- Functional /Technical Lead(s)

**Required Deliverables**
- Project Definition Document
- Project Schedule / WBS
- Communications Plan
- Signed Contract (if required)
- Categorization Form (Security)

**Activities**
- Baseline Business Requirements
- Acquire Project Team
- Create PDD: Scope, roles, deliverables, milestones, success criteria, budget, resources, issues mgmt, metrics/status reporting plan, change mgmt plan, & risk mgmt plan
- Baseline Schedule
- Obtain Signed Contract(s)
Project Management Life Cycle (PMLC)
Analysis, Design & Development Phase Overview

- Monitor implementation versus business requirements & scope
- Complete planning activities for test and deployment
- Control changes through the Change Management Plan

Key Participants
- Project Owner
- Project Manager
- Functional /Technical Lead(s)

Required Deliverables
- Requirements Traceability Matrix (Bus Req -> Func Req -> Dev)
- Test Plan including test cases
- Deployment & Training Plan
- Updated Project Schedule

Activities
- System / Process development complete & unit tested
- Requirements Traceability & Review complete
- Critical Design Review complete
- Test Readiness Review complete
- Test & Deployment Plans are baselined
- SLA Developed
Project Management Life Cycle (PMLC)

**Testing & Readiness Phase Overview**

- Test the process / system versus the business and technical requirements
- Provide metrics enabling high-level analysis of test results
- Manage issues uncovered through testing to resolution

### Key Participants

- Project Owner
- Project Manager
- Functional /Technical Lead(s)

### Required Deliverables

- Test Results Analysis & Approval
- Updated Requirements Traceability Matrix – Issues found & resolution
- Security review and approval
- Service Level Agreement (SLA)
- Updated Communications Plan
- Updated Project Schedule

### Activities

- Test procedures are fully executed & exit criteria met per test plan
- User acceptance received
- Required fixes are implemented
- All remaining issues are documented with resolution dates
- Project Team Cutover Readiness Review

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**Project Management Life Cycle (PMLC) Overview**

1. **Planning**
2. **Design & Development**
3. **Testing & Readiness**
4. **Cutover / Post Go Live**
5. **Closing**

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**GO LIVE!**
• Monitor deployment to the users per the Deployment Plan
• Ensure proper training tools, resources, and planning to educate users
• Align adequate support during the deployment

Key Participants
• Project Owner
• Project Manager
• Functional /Technical Lead(s)
• Support / Maintenance Group

Required Deliverables
• User / Administrator Training & Support Documentation
• Project Transition Document

Activities
✓ Key deployment milestones are completed per Deployment Plan
✓ End users have been adequately prepared for new or changed system / process
✓ Support resources have been engaged in preparing for hand-off
Project Management Life Cycle (PMLC) Closing Phase Overview

- Validate that project success criteria have been met
- Transition support to the proper group for ongoing maintenance
- Communicate closure of the project to all stakeholders

<table>
<thead>
<tr>
<th>Key Participants</th>
<th>Required Deliverables</th>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Project Owner</td>
<td>□ Project Financial Report/Budget</td>
<td>✓ Project approved by Sponsor &amp; Key Stakeholders</td>
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<tr>
<td>• Project Manager</td>
<td>□ Project Lessons Learned</td>
<td>✓ System / Process maintenance handed off to appropriate support</td>
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<tr>
<td>• Project Lead(s)</td>
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<td>✓ Lessons learned captured and documented</td>
</tr>
<tr>
<td>• Project Sponsor(s)</td>
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<td>✓ Documents and artifacts archived</td>
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<tr>
<td>• All Project Stakeholders</td>
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</table>

**Key Participants**
- Project Owner
- Project Manager
- Project Lead(s)
- Project Sponsor(s)
- All Project Stakeholders

**Required Deliverables**
- Project Financial Report/Budget
- Project Lessons Learned

**Activities**
- Project approved by Sponsor & Key Stakeholders
- System / Process maintenance handed off to appropriate support
- Lessons learned captured and documented
- Documents and artifacts archived
# Project Management Life Cycle (PMLC) Document / RACI Matrix

<table>
<thead>
<tr>
<th>Document Name</th>
<th>Phase Created</th>
<th>Project Owner</th>
<th>Process Initiator</th>
<th>Project Manager</th>
<th>Functional Resources</th>
<th>Technical Resources</th>
<th>Project Exec Sponsor</th>
<th>Project Stakeholder</th>
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<tbody>
<tr>
<td>Project Request Form / Request Summary</td>
<td>Idea</td>
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<td>Risks, Issues &amp; Actions Log</td>
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<tr>
<td>User &amp; Administrator Training &amp; Support Documentation</td>
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<td>Project Transition Document (includes approval)</td>
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1. For EVP&T Contracts, the Executive Vice President & Treasurer is often the final signatory.
2. The Project Manager can coordinate completion of these artifacts. However, responsibility rests in the functional and/or technical resources.
3. Responsibility for these documents will be determined by the nature of the project and should be agreed upon prior to entry into the phase in which they are required.
4. The appropriate managers for the functional and technical resources committed to the project serve as the approval authority for the PDB.

**Legend:**
- **R** = Responsible - The assigned owner of the artifact who is responsible for its creation.
- **A** = Approval - Person responsible for approving the artifact once complete.
- **C** = Consult / Contribute - Persons directly involved in the completion of the artifact. These people do much of the work required to complete the artifact.
- **I** = Informed - Persons who need to know regarding the progress and completion of the artifact.