



## SOLUTIONS DELIVERED

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Project Management  
Mission Accomplished.

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## *From Our PM Practice Leader*

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### “MISSION ACCOMPLISHED!”

We love the sound of those two words, as do all successful executives. If you do not hear them enough in your organization, please read on.

Today’s business environment requires you to deliver – plain and simple. Great project leaders leverage a set of formal technique and tools, but more importantly, use skills developed through experience. Project leadership requires discipline, crisp communication, a keen eye for identifying and managing risk and the ability to motivate and inspire. In short, this role requires people with a passion to get things done.

At Blue Star Partners, each of our project managers has at some point delivered quietly and with noisy celebration, spent sleepless nights figuring out how to rescue a project they took over, learned the best lessons from missteps (their own or others), put ill-conceived projects out of their misery, and everything in between. We know how to gather your business needs and then plan and execute the best way to meet or exceed them.

Effective project management drives your organization and its reputation, stability, growth and profits. I hope this booklet will help you understand how BSP’s “Project Assurance” helps clients accomplish their mission.

If you have any questions or require support, please contact me by email or telephone.

Best,

**Robert Matoesian**  
**[rmatoesian@bluestarpartners.com](mailto:rmatoesian@bluestarpartners.com)**  
**Blue Star Partners, LLC**



# Project Management Overview

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## PROJECT MANAGEMENT – A DISCIPLINED APPROACH TO PLANNING, ORGANIZING AND MANAGING RESOURCES TO ACHIEVE SPECIFIC BUSINESS OBJECTIVES

Careful planning, monitoring and leadership of an initiative helps organizations overcome the reasons why projects fail -- like poor scope definition and containment, insufficient resources, and missed deadlines.

Our approach is the result of years of experience in project management, product development and system integration projects across a variety of industries and business functions. We consider your existing practices and complement them with our best practice templates and experience.

We have project managers with the experience to lead projects of all size and complexity. Our methodology will help you achieve success for your projects and identify ways to improve your programs.



## *Project Management Overview*

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*“Operations keep the lights on. Strategy provides a light at the end of the tunnel. But, Project Management is the train engine that moves the organization forward.”*

- Joy Gunz

Successful project delivery is assured by a disciplined and organized approach to initiate, plan, design, execute, and deliver a project. This basic process may have different names in different companies, but the fundamentals they represent do not change.

Experienced project managers employ multiple techniques to manage a project, based on its complexity and the corporate culture, among many other factors. Experienced project managers also know that corporate expectations have an influence on the tools and techniques used. At Blue Star Partners, we have a complete suite of tools and templates, or we can use yours, depending on your needs. What will not vary, however, is a thorough, professional approach to delivering results, using project management fundamentals.



# Project Management Process Groups

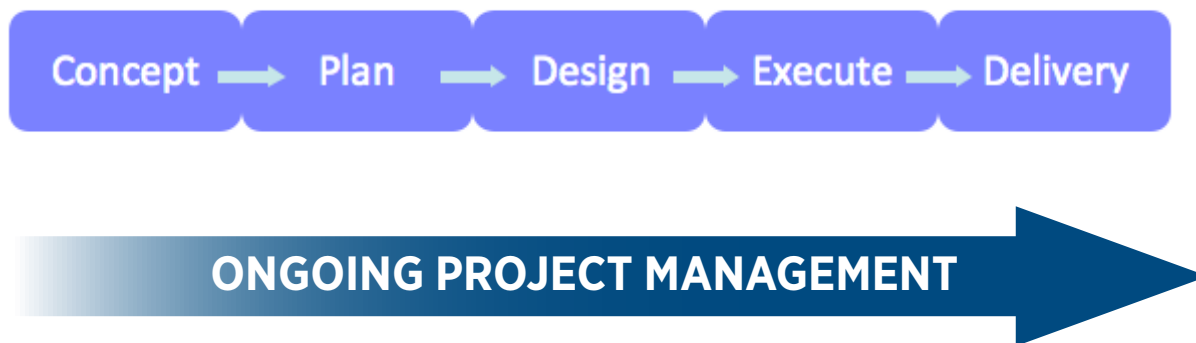
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**The five Process Groups below have clear dependencies and are performed in the same sequence on each project:**

- ✦ **CONCEPT** - Defines and authorizes the project or a project phase;
- ✦ **PLAN** - Plans the course of action to achieve the objectives and the scope of the project;
- ✦ **DESIGN** - Lays the groundwork to move the project forward;
- ✦ **EXECUTE** - Integrates the resources to attain the goals of the project;
- ✦ **DELIVERY** - Implements the solution and brings the project (or phase) to a close.

The diagram below provides a summary of the basic flow and interaction of the process groups. Please note the process groups are not always project phases. Large projects may be separated into distinct sub-projects that would each repeat the process groups.

## PROJECT MANAGEMENT METHODOLOGY



## Concept

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*“An idea can be as flawless as can be, but its execution will always be full of mistakes.”*

- Brent Scowcroft

Concept is the most critical part of a project. Surprised? Don't be.

A lot of projects enter this phase, but not all should continue on beyond it. When a project begins, you often simply have a great hypothesis. For example, “If I buy this software or undertake this project, everything will be better.” In the beginning projects typically have high aspirations, facing off against unrealistic expectations of what it takes to achieve those goals. And, then, throw in a few good risks and other real-life obstacles for good measure. The goal in the “Concept” phase is to begin to highlight these and see if the project still looks good under the bright lights of scrutiny.

It's important to do a few actions very well in this first phase:

- Obtain the required amount and level of executive support
- Ensure your mission is clear and compelling
- Pick the right people for the job – don't settle for less than you need
- Explore solution alternatives, including doing nothing now
- Probe the assumptions, risks, and dependencies

When finished looking at the project from every angle, you must put it all together into an executive package that details what it means to take on the project, the type and amount of risk involved, and what is required for success. Don't proceed with the project until you have what you think you need, because you'll always find out you needed more than you thought!

The key to the “Concept” phase is to probe the scope statement and the assumptions to ensure this is a problem worth solving now and that you have the resources required to do so. At the end a formal go/no go decision should be made. Not all projects should be expected to pass this stage.

### DELIVERABLES

- ✦ **Scope**
- ✦ **Project Charter**
- ✦ **Business Case**
- ✦ **ROI/Valuation**
- ✦ **Executive Commitment**
- ✦ **Sponsorship**
- ✦ **Resource Requirements**



*“Failing to plan is planning to fail.”*

- Alan Lakein

Now that you have determined that the project should go forward, during the Plan Phase, the Project Manager role is to lead the team to define a specific path forward. Requirements will be defined in more detail and scope refined accordingly. The Project Manager will then shape an approach to satisfy them and define a comprehensive work plan that meets the project’s scope and complexity. This plan will serve as the roadmap that the project will follow to ensure success. The Project Manager will also gather and mobilize the key resources (both technical and functional), who will carry out the plan.

## **DELIVERABLES**

### **✦ Business Requirements**

### **✦ Scope Refinement**

### **✦ Approach**

### **✦ Budget**

### **✦ Work Plan (including supporting plans)**

- Work Schedule
- Scope Management Plan
- Risk Management Plan
- Sourcing Plan
- Staffing Plan
- Quality Plan
- Communications Plan
- Change Management Plan

### **✦ Staff Resources**

### **✦ Vendor Contracts (as applicable)**





*“Time = Life; master your time and you master your life”*

- Alan Lakein

With requirements defined and the work plan ready, solution design can now commence. Strategies and plans for testing, training and deployment will be developed. End state architecture will be designed, along with establishing key metrics to chart the new solution.

## **DELIVERABLES**

- ✦ **Detailed Design Documentation**
- ✦ **Training Strategy/Plan**
- ✦ **Testing Strategy/Plan**
- ✦ **Deployment Strategy/Plan**
- ✦ **Vendor Management Strategy**
- ✦ **Future State Organization Metrics**
- ✦ **Architecture**
- ✦ **Contracts**



*“To succeed in life in today’s world, you must have the will and tenacity to finish the job.”*

- Johann Wolfgang von Goethe

As the designs are completed, the final, integrated solution begins to further take shape and be realized. Testing is conducted to ensure that the final solution matches the requirements and will meet the needs of the business when it is deployed. Training is prepared to enable key personnel are knowledgeable about the solution and can leverage it. Processes are designed and/or updated.

Staying the course during the Execute Phase requires diligent tracking of progress and issues, as well as managing the expectations of multiple stakeholders, including the project sponsors, the steering committee and business partners. Team development is another critical activity during this phase. Cohesive, high performing teams can be the difference between project success and failure.

### **DELIVERABLES**

- ✦ **Testing**
- ✦ **Status Reports/ Dashboards**
- ✦ **Issues/ Risk Log**
- ✦ **Training Development**
- ✦ **Process Development**
- ✦ **Integrated Solution**



*“A really great talent finds its happiness in execution.”*

- Chin-Ning Chu

Implementation! When the day finally arrives to “go live” with your solution, there can be a temptation to declare “Mission Accomplished.” However, now is when some of your most critical work is just beginning. Training is conducted. New/revised processes are rolled out. The new infrastructure is put in place. Ongoing support and reporting/metrics are established. The project is reviewed, providing insight which can be leveraged in the future, and the closed out.

Checking in with those affected by the change for adoption and feedback, taking stock of lessons learned and ensuring the right on-going support is in place are all critical for long-term success.

As a project fully winds down, a seamless transition to the steady state team is critical for sustainable change. Also, this is the time to ensure all “final” documentation is in place, both from a knowledge management as well as SOX compliance standpoint. Knowing if there are any changes to be made in a future release or if there are additional training “refreshers” needed will all help to officially close out a project on a high note, building the organization’s confidence in its ability to deliver results.

### **DELIVERABLES**

- ✦ **Conduct Training**
- ✦ **Implement Solution**
- ✦ **New Processes**
- ✦ **New Infrastructure**
- ✦ **Ongoing Support**
- ✦ **Reporting/Metrics**
- ✦ **Lessons Learned**
- ✦ **Project Monitoring Metrics**
- ✦ **Business Case Realization**
- ✦ **Final Deliverable Set**
- ✦ **Final Result (Product or Service)**
- ✦ **Project Closure Procedure**
- ✦ **Contract Closure Procedure**



## WE KNOW OUR CLIENTS AND HELP THEM IMPLEMENT SUCCESSFUL PROJECTS.

Blue Star Partners, LLC delivers the best change management, project management and executive coaching talent, advice & tools. Our deep understanding of process, technology and human capital enables us to help our clients realize their vision through a proven, disciplined methodology. Our consultants typically have previous “Big Five” consulting experience and bring proven methodologies and tools to an engagement.

Our latest consulting projects include strategic planning, large-scale change and project management, merger integration, ERP integration, executive coaching, human capital management, and business process redesign. Recent engagements include program management, organization development, compensation analysis, information technology, and instructional design.

### **We take pride in the fact that we know our clients and enable them to lead successful change efforts. To this end, we will ...**

- ◆ Understand your business needs;
- ◆ Facilitate a discovery session, if necessary;
- ◆ Present a proposal confirming our understanding of your needs;
- ◆ Agree on the terms of our engagement;
- ◆ Launch the project and ensure its successful delivery



## CONTACT US

**email** info@bluestarpartners.com

**phone** (312) 264-6590

**locations** Chicago, IL  
New York, NY

**website** www.bluestarpartners.com

To request additional copies of Project Assurance or to comment:  
[www.bluestarpartners.com/contact.php](http://www.bluestarpartners.com/contact.php)

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