



# IT Project Management

(Lecture 5)

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# Previous Lecture

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- Traditional Project Management
- 9 Knowledge areas



# Outline

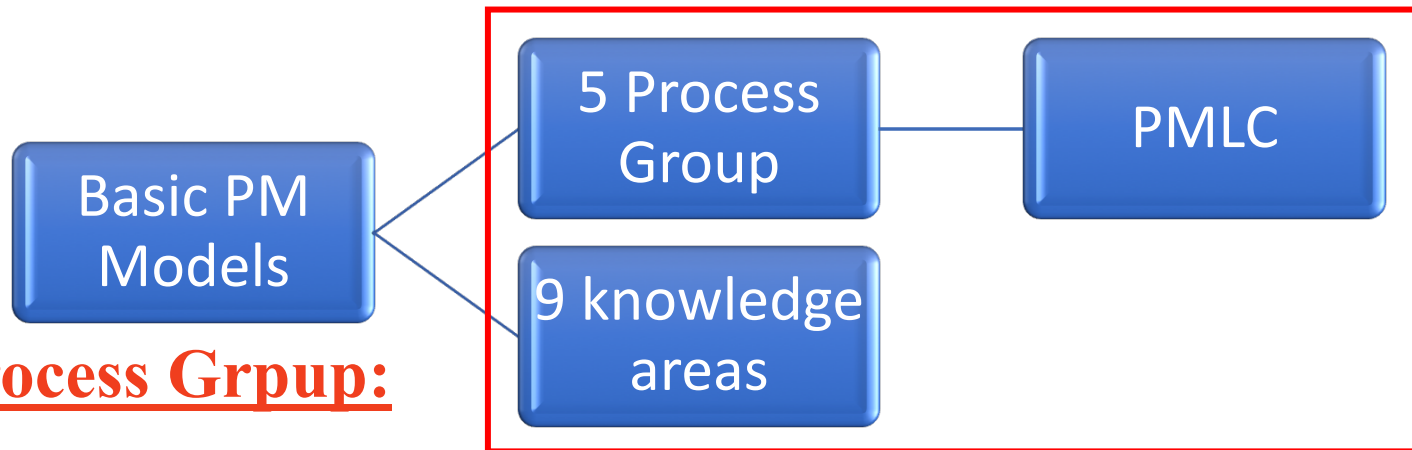
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- Scoping Process Group (1/5)
  - Developing Conditions of Satisfaction (COS)
  - Project Overview Statement (POS)

# Basic PM Models

- Basic of all Project Management (PM) models are:

## Previous Lecture



- **Process Grpup:**

1. Scoping Process Group ← **Now**
2. Planning Process Group
3. Launching Process Group
4. Monitoring & Controlling Process Group
5. Closing Process Group



# Scoping PG

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- The first phase of the TPM life cycle is the Defining Phase (Scoping Process Group).
- The Defining Phase scopes the project.
  - In collaboration with the customer, the problem and solution are identified and documented. What will be produced (the deliverables) is also defined and clearly documented.
- The outline of this stage:
  - The first tasks for project managers is to define the work that needs to be done (Scope)
  - After the scope is complete, it is documented in the form of the Project Overview Statement (POS), POS is a brief document (usually one page) that provides, in the language of the business, a high-level description of the project.



# Scoping PG

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- The project must be clearly defined. i.e. what the project is all about?
- One of the reasons for the project failure is the **people-to-people communication**
- The solution to this problem is the CONDITION OF SATISFACTION (COS).
- COS establishes a language of communication and understanding between project manager and client
- After condition of satisfaction, POS is prepared, It is a one page document also. POS clearly states that what is to be done. once the POS is approved, the scoping phase is complete



# Scoping PG

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- **Example:**

- Requestor: I would like you to build five prototypes of the new forest green widgets and ship them to my warehouse on December 1, 2017.
- Provider: You are asking if we can get five green widget prototypes into your warehouse by December 1, 2017?
- Requestor: Actually, if you can get them shipped by December 1, 2017, that will be acceptable. But remember they have to be forest green.
- Provider: So if on December 1, 2017, I can ship five forest green widgets to your warehouse, you will be satisfied.



# Scoping PG

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- **Example:**

- Requestor: Yes, but they must be the new model, not the old model.
- Provider: The new model?
- Requestor: The new model.
- Provider: I believe I understand what you have asked for.
- Requestor: Yes, I believe you do.
- Provider: Because of my current production schedule and the fact that I have to change paint colors, I can ship two forest green widgets on November 25, 2017 and the remaining three on December 8, 2017.





# Scoping PG

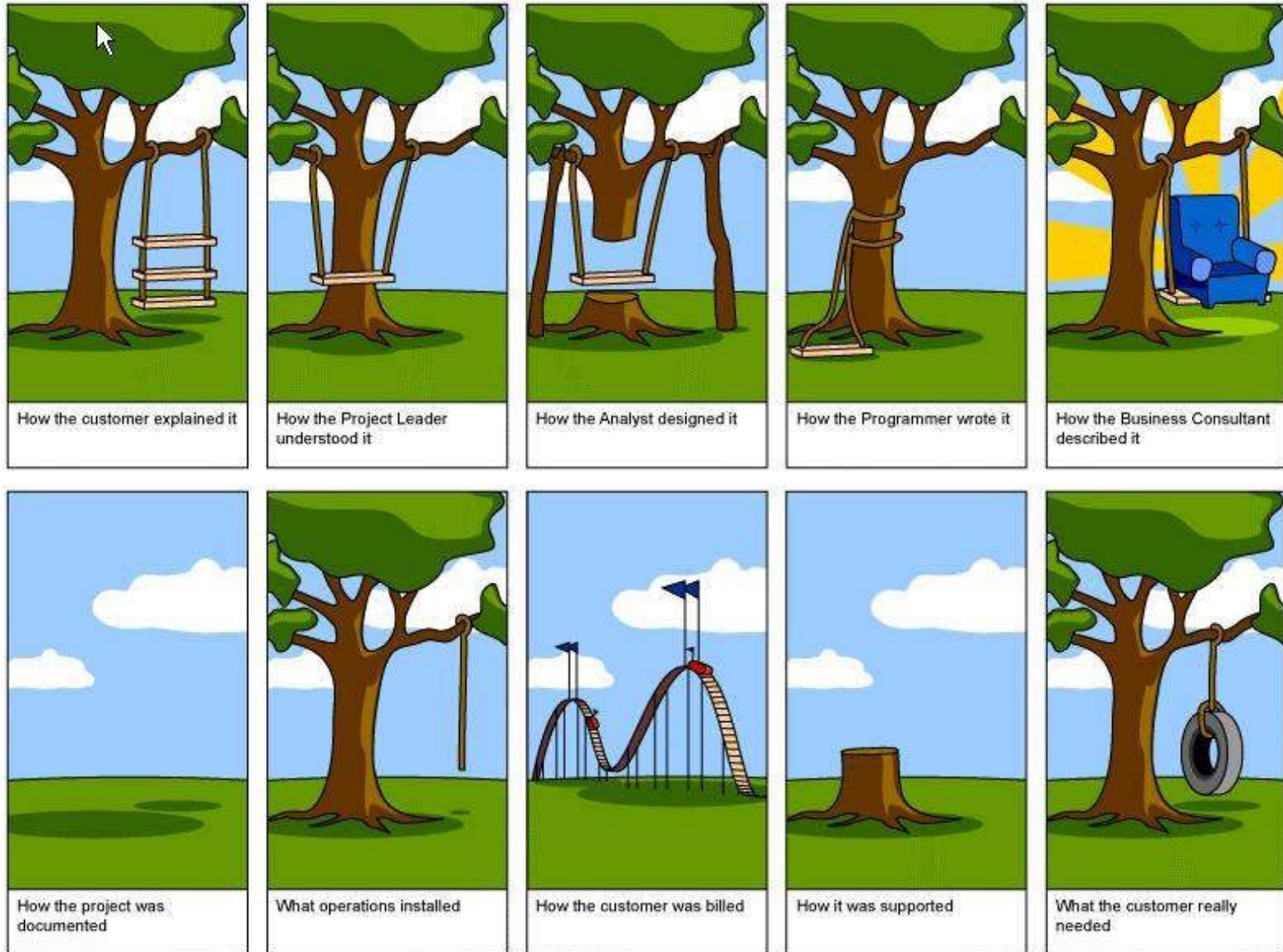
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- **Example:**

- Requestor: If I understand you correctly, I will get five prototypes of the new forest green widgets in two shipments — two prototypes on November 25 and three on December 8. Is that correct?
- Provider: Not exactly. You won't receive them on those dates. I will ship them to your warehouse on those dates.
- Requestor: So, let me summarize to make sure I understand what you are able to do for me. You will build a total of five forest green prototypes of the new widgets for me and ship two of them on November 25 and the remaining three on December 8?
- Provider: That is correct.

# Scoping PG

## Example:



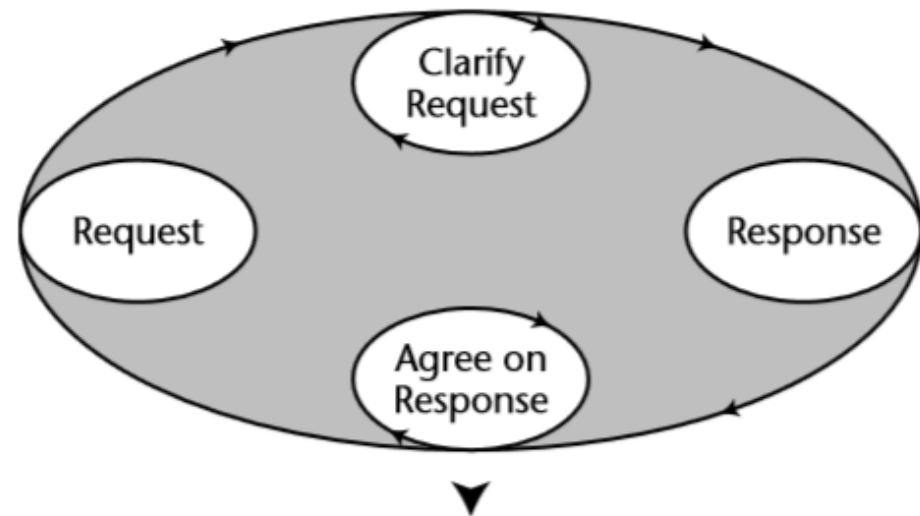


# Scoping PG

- For understanding the needs of client we should built up a clear **Condition of Satisfaction (COS)** between provider and requester.
- The process of developing the **COS involves four parts:**
  1. **Request:** A request is made.
  2. **Clarification:** The provider explains what he/she heard as the request. This conversation continues until the requestor is satisfied that the provider clearly understands the request.
  3. **Response:** The provider states what he or she is capable of doing to satisfy the request.
  4. **Agreement:** The requestor restates what he or she understands the provider will provide. The conversation continues until the provider is satisfied that the requestor clearly understands what is being provided.

# Scoping PG

- The next step in the COS process is to negotiate to closure on exactly what will be done to meet the request. Obviously, some type of compromise will be negotiated.
- The final agreement is documented in the **POS**.
- This process repeats itself, until there is an agreed-to request that is satisfied by an agreed-to response.
- You may be inclined to skip this step. Remember: *pain me now or pain me later*.
- Always use the COS to ensure that you both understand what is expected.



Negotiate Agreement and  
Write Project Overview Statement



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- COS provide input you need to generate POS (ideally one page) that concisely states:
  - what is to be done in the project,
  - why it is to be done, and
  - what business value it will provide to the enterprise when completed.)
- The POS cannot contain any technical specialized language that generally would not be used across the enterprise.
- POS becomes the foundation for future planning and execution of the project.
- POS becomes the reference document for questions or conflicts regarding project scope and purpose.



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The main purpose of the POS is
  - to secure senior management approval and the resources needed to develop a detailed project plan.
  - reference for the team. An equally important reason for writing a POS is to give your team briefing information on the project.
- Sometimes you inherit a project, which has been defined and scoped; a budget, staff resources, and a completion date also have been determined.
  - In this scenario, do you write a POS? Yes!
  - **Because:** (1) to become familiar with and understand the project and the customer's and management's expectations.
  - (2) write POS to be reference for the team.

# Scoping PG

## ❖ Create Project Overview Statement (POS):

– The POS has five component parts:

1. Problem/opportunity
2. Project goal
3. Project objectives
4. Success criteria
5. Assumptions, risks, obstacles

PROJECT OVERVIEW STATEMENT	Project Name	Project No.	Project Manager
Problem/Opportunity			
Goal			
Objectives			
Success Criteria			
Assumptions, Risks, Obstacles			
Prepared by	Date	Approved by	Date



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 1. Problem/opportunity

- The first part of the POS is a statement of the problem or opportunity that the project addresses.
- Write down separate lists of who?, what?, when?, where?, why?, and how? questions that are relevant to the problem/opportunity.
- State the problem/opportunity using the description ‘In what ways might...?’
- This statement is fact, it does not need to be defined or defended.
- Everyone in the organization will accept it as true.
- This is critical because it provides a basis for the rest of the document.





# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 2. Project goal:

- The second section of the POS states the goal of the project:
  - what you intend to do to address the problem or opportunity identified in the problem/opportunity
- The purpose of the goal statement is to get senior management to value the idea enough to read on.
- A project has one goal. The goal gives purpose and direction to the project.
  - It defines the final deliverable or outcome of the project so that everyone understands what is to be accomplished in clear terms.



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 2. Project goal:

- The goal statement must not contain any language or terminology that might not be understandable to anyone having occasion to read it.
- Just like the problem or opportunity statement, the goal statement is short and to the point.
- The goal statement does not include any information that might commit the project to **dates or deliverables** that are not practical.
  - Remember that you do not have much detail about the project at this stage.
  - If the management ask you about a date, estimate the nearest quarter, month, or week as expected. Ex: the project can approximately complete in 9 to 12 months after starting.



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 2. Project goal:

- George Doran's S.M.A.R.T. characteristics provide the criteria for a goal statement:

**I. Specific:** Be specific in targeting an objective

**II. Measurable:** Establish a measurable indicator(s) of progress

**III. Assignable:** Make the object assignable to one person for completion

**IV. Realistic:** State what can realistically be done with available resources

**V. Time-related:** State when the objective can be achieved — that is, duration.



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 3. Project Objectives:

- The third section of the POS describes the project objectives.
  - Think of objective statements as a more detailed version of the goal statements.
- The purpose of objective statements is
  - to clarify the exact boundaries of the goal statement and
  - define the boundaries or the scope of your project.
- Every objective must be accomplished in order to reach the goal, and no objective is unnecessary.
- The current objective statements may change during the planning stage of the project.



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 3. Project Objectives:

- A good exercise to test the validity of the objective statements is to ask if it is clear what is in and what is not in the project.
- An objective statement should contain four parts:
  - I. **An outcome:** A statement of what is to be accomplished
  - II. **A time frame:** A preliminary estimate of duration.
  - III. **A measure:** Metrics that will measure success
  - IV. **An action:** How the objective will be met.



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 4. Success Criteria:

- The fourth section of the POS answers the question
  - “Why do we want to do this project?”
  - It is the measurable business value that will result from doing this project.
- Whatever criteria are used, they must answer the question
  - “What must happen for us and the customer to say the project was a success?”
- It is essential that the criteria be quantifiable and measurable, and, if possible, expressed in terms of business value



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 4. Success Criteria:

- No matter how you define success criteria, they all reduce to one of three types:

**I. Increased revenue:** As a part of the success criteria, that increase should be measured in hard dollars or as a percentage of a specific revenue number.

**II. Reduced costs:** Again, this criterion can be stated as a hard-dollar amount or a percentage of some specific cost.

**III. Improved service:** this criteria is more difficult to define. It's usually some percentage of improvement in customer satisfaction or a reduction in type of customer complaints.



# Scoping PG

## ❖ Create Project Overview Statement (POS):

- The POS has five component parts:

### 5. Assumptions, risks, obstacles

- The fifth section of the POS identifies any factors that can affect the outcome of the project and that you want to bring to the attention of senior management.
- These factors can affect deliverables, the realization of the success criteria, the ability of the project team to complete the project as planned
- These factors can be:
  - I. Technological
  - II. Environmental
  - III. Interpersonal
  - IV. Cultural
  - V. Causal relationships





# Scoping PG

## ❖ Create Project Overview Statement (POS):

Example of POS:



<b>PROJECT OVERVIEW STATEMENT</b>	Project Name Office Supply Cost Reduction	Project No.	Project Manager PAUL BEARER
<b>Problem/Opportunity</b> <p>Our cost reduction task force reports that office supply expenses have exceeded budget by an average of 4% for each of the last three fiscal years. In addition an across the board budget cut of 2% has been announced and there is an inflation rate of 3% estimated for the year.</p>			
<b>Goal</b> <p>To implement a cost containment program that will result in office supply expenses being within budget by the end of the next fiscal year.</p>			
<b>Objectives</b> <ol style="list-style-type: none"> <li>1. Establish a departmental office supply budgeting and control system.</li> <li>2. Implement a central stores for office and copying supplies.</li> <li>3. Standardize the types and brands of office supplies used by the company.</li> <li>4. Increase employee awareness of copying practices that can reduce the cost of meeting their copying needs.</li> </ol>			
<b>Success Criteria</b> <ol style="list-style-type: none"> <li>1. The total project cost is less than 4% of the current year office supply budget.</li> <li>2. At least 98% of office supply requests are filled on demand.</li> <li>3. At least 90% of the departments have office supply expenses within budget.</li> <li>4. No department office supply expense exceeds budget by more than 4%.</li> </ol>			
<b>Assumptions, Risks, Obstacles</b> <ol style="list-style-type: none"> <li>1. Central stores can be operated at or below the breakeven point.</li> <li>2. Users will be sensitive to and supportive of the cost containment initiatives.</li> <li>3. Equitable office supply budgets can be established.</li> <li>4. Management will be supportive and consistent.</li> <li>5. The existing inventory control system can support the central stores operation.</li> </ol>			
Prepared By Olive Branch	Date 9/2/04	Approved By Del E. Lama	Date 9/3/04



# Assignment 2

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- **SAME** Students group of **Assignment 1** (2-3 members), explain the following:
  - Develop any IT based project proposal where you should discuss:
    - I. Project's Scope, Cost, time and resources
    - II. Project WBS and Gantt chart
    - III. Project's possible risks and how to manage them
  - Submit Project Title (**NEXT WEEK**), if your title was taken by others. So you must change it (**Project Title MUST BE UNIQUE**)
- Maximum 15 pages, no handwriting, submitted Hardcopy
- Deadline (**23/05/2018**)



# Questions & Answers

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THANK  
YOU