

Chapter 3 Initiating To officially initiate the project management intranet site project, Erica knew that the main tasks were to identify all of the project stakeholders and to develop the project charter. The intranet site will include several templates and tools that users can download, examples of completed templates and related project management documents used on real projects, important articles related to recent project management topics, an article retrieval service, links to other sites with useful information, and an "Ask the Expert" feature, where users can post questions about their projects and receive advice from experts in the field. Some parts of the intranet site will be accessible free to the public, other parts will only be accessible to current customers and internal consultants, and other parts will be accessible for a fee. Main Project Success Criteria: The project should pay for itself within one year of completion. Approach:

- o Develop a survey to determine critical features of the new intranet site and solicit input from consultants and customers.
- o Review internal and external templates and examples of project management documents.
- o Research software to provide security, manage user inputs, and facilitate the article retrieval and "Ask the Expert" features.

Results of the stakeholder analysis can be documented in a stakeholder register or in a separate stakeholder register

TABLE 3–4 Stakeholder register

The Project Management Process Groups: A Case Study	Internal/ External	Project Name	Position	Role	Contact Information
Joe Fleming	Internal	CEO	Internal Sponsor		joe_fleming@jwdconsulting.com
Erica Bell	Internal	PMO Director			erica_bell@jwdconsulting.com
Michael Chen	Internal	Team member			michael_chen@jwdconsulting.com
Kim Phuong	External	Business analyst	External Advisor		kim_phuong@client1.com
Louise Mills	Internal	PR Director	Internal Advisor		louise_mills@jwdconsulting.com

(C) Cengage Learning 2014 management strategy. Project Manager: Erica Bell, (310) 555–5896, erica_bell@jwdconsulting.com Project Objectives: Develop a new capability accessible on JWD Consulting's intranet site to help internal consultants and external customers manage projects more effectively. They decided that key team members should include one of their full-time consultants with an outstanding record, Michael Chen; one part-time consultant, Jessie Faue, who was new to the company and supported the Project Management Office; and two members of the IT department who supported the current intranet, Kevin Dodge and Cindy Dawson. After Joe and Erica made the preliminary contacts, Erica documented the stakeholders' roles, names, organizations, and contact information in a stakeholder register, a document that includes details related to the identified project stakeholders. Because many other people would be affected by this project as future users of the new intranet, Joe and Erica also identified other key stakeholders, including their directors of IT, Human Resources (HR), and Public Relations (PR), as well as Erica's administrative assistant. I will have one of my assistants support the project as needed."--Michael Chen "We need to be extremely careful testing this new system, especially the security in giving access to parts of the intranet site to the public and clients."--Kevin Dodge and Cindy Dawson

Chapter 3 TABLE 3–6 Project charter

The Project Management Process Groups: A Case Study assignments with external clients might have a higher priority. (See Chapter 4 for more information on project charters.) Note the items included on the project charter and its short length. Erica felt the most important parts of the project charter were the signatures of key stakeholders (not included for brevity) and their individual comments. Note that Michael Chen, the senior consultant asked to work on the project, was concerned about participating when he

felt that his other Project Title: Project Management Intranet Site Project Project Start Date: May 2 Projected Finish Date: November 4 Budget Information: The firm has allocated \$140,000 for this project.

TABLE 3–3 Project initiation knowledge areas, processes, and outputs Source: PMBOK(R) Guide, Fifth Edition, 2012.

Recall from Chapter 1 that stakeholders are people involved in project activities or affected by them, and include the project sponsor, project team, support staff, customers, users, suppliers, and even opponents to the project. A stakeholder analysis is a technique that project managers can use to help understand and increase the support of stakeholders throughout the project. This strategy includes basic information such as stakeholder names, level of interest in the project, level of influence on the project, and potential management strategies for gaining support or reducing obstacles from each stakeholder.

- o Develop the intranet site using an iterative approach, soliciting a great deal of user feedback.

Additional outputs that Erica found very useful for initiating projects were a stakeholder management strategy and a formal project kick-off meeting. Descriptions of how these outputs were created and sample documents related to each of them are provided for this project. They also knew that client inputs would be important for this project, so Joe agreed to call the CEOs of two of the firm's largest clients to see if they would be willing to provide representatives to work on this project at their own expense. JWD Consulting believes that project charters should be one or two pages long, and they may refer to other documents, such as a business case, as needed.

- o Determine a way to measure the value of the intranet site in terms of reduced costs and new revenues, both during the project and one year after project completion.

Table 3–3 shows these processes and their outputs, based on the PMBOK(R) Guide, Fifth Edition. The main outputs are a project charter and a stakeholder register. Recall that every project and every organization is unique, so not all project charters, stakeholder registers, and other outputs will look the same.

Identifying Project Stakeholders Erica met with Joe Fleming, the project's sponsor, to help identify key stakeholders for this project. Table 3–4 provides an example of part of the initial stakeholder register. You will see other examples of documenting stakeholder information in later chapters.

TABLE 3–5 Stakeholder management strategy

Level of	Level of	Name	Interest	Influence	Potential	Management	Strategies
Joe Fleming	High	High	Joe likes to stay on top of key projects and make money.	(C)	Cengage Learning 2014	Drafting the Project Charter	Erica drafted a project charter and had the project team members review it before showing it to Joe. You will see examples of several of these documents in later chapters. All of the internal staff Joe and Erica recommended agreed to work on the project, and the two client representatives were Kim Phuong and Page Miller. She would keep these issues in mind discreetly and use them in developing the stakeholder management strategy. Some project managers do not even write down this information, but they do consider it because stakeholder management is a crucial part of their jobs. Table 3–5 provides an example of part of Erica's stakeholder management strategy for the project management intranet site project. It is hard to get stakeholders to agree on even a one-page project charter, so everyone has a chance to make their concerns known in the comments section.