Management of Your Consulting Project/Contract

Project Planning

$400 before record for taxation

Project vs. Program

Project A temporary task undertaken to create a unique product or service

Program A series of projects that are managed in a coordinated way (longer term)

Project management is a process:

- **Initiate:** conceptualize the idea or task
- **Plan:** how will you actually complete the task
- **Execute:** do the plan
- **Control:**
- **Close:**

Project Initiation

How does your project get started?

- Formal response to request for proposal (RFP)

- Informal request to tackle a project

- Cold call

- **Mission:** why are you taking on the project

- **Objective:** what are the goals of the project

- **Deliverables:** what outcomes constitute completion

- **Client/Customer:** who has interest in the project

Project Planning

Areas to cover:

- Scope of project/tasks
- Time requirements
- Cost discussion
- Known issues that need to be addressed
- Risk management
- Quality control requirements
- Communications
- Resource requirements

Helpful Artifacts

- Work breakdown structure (WBS)
- Project budget
    - Bill of Materials (BOM)
- Project schedule
    - Start and end dates
    - How to fill in everything in between
    - Major milestones
- Responsibility assignment matrix (RAM)
- Configuration change control process
    - Know the cost of making a change
- Risk management plan

Project execution

How do you know if you are ahead or behind schedule?

- Schedule tracking and status
    - All planned tasks should be incorporated into some form of a schedule
    - Advises number of resources and how to adjust if necessary
- Measure Project Activities
    - Amount of effort over time
    - What happened or is happening?
    - Report progress to client/customer

Work Breakdown Structure

A product-oriented "family tree" division of hardware, software, services, and other work products which organizes graphically.

- Hierarchical breakdown of products and services

- All products and services required to complete the project

- Consulting likely won't get to this level of detail

- Budget

- Master schedule

- Organization

- Contract Tasking

- Risk management

- Reporting

Change Management

Depends on risk of change for each requirement.

Project Status Reporting

Can be formal or informal, but ultimately up to the client or customer.
- Informal tends to allow more open and honest communication
- Still need actual metrics

How often to report status
- Monthly is too infrequent
- Daily can make it hard to assess and react
- Weekly tends to be about right

Acceptance
- Fully define some level of acceptance
- How do you know when the product is acceptable
- Clear criteria doesn't always exist

Approval
- Who approves the project deliverables?
- When is a project approved?
- May require your client to seek approval if you are a sub-contractor