**Origination Phase:**

* Develop and submit Project Proposal (System Service Request)

**Initiation Phase:**

* Enter project information into PSS and create a PSS number (include POR information)
* Create a Project Folder / Repository to store all developed documentation
* Hold a project “kick-off” meeting
* Identify project roles and responsibilities, including Sponsor and key Stakeholders
* Begin to identify the project scope and budgetary requirements
* Identify who will receive updates on the project and when (Communication Plan)
* Develop a Project Definition Document / Receive approval from Sponsor

**Planning Phase:**

* Gather Functional and Technical requirements
* Finalize the project scope and budget requirements
* Identify potential risks and begin managing those risks (Risk Management)
* Create a processes for managing issues (Issues Management)
* Identify initial task assignments and estimated completion dates
* Develop a Project Schedule
* Hold a Planning Review meeting with the Sponsor

**Execution Phase:**

* Develop and distribute status reports (as identified in the Communication Plan)
* Manage Sponsor expectations thru frequent updates
* Address and close any identified issues and risks. Take appropriate action as necessary.
* Create and execute Quality Assurance (QA) / Testing Process
* Receive approval from Sponsor to implement the solution / “Go Live”

**Close-Out Phase:**

* Confirm with the Project Sponsor that Critical Success Factors have been met
* Hold Project Close-out meeting (identify what went well & what could have gone better)
* Finalize the Project Close-out Report / Distribute to Sponsor(s) and Team Members
* Update PSS (i.e. mark project “complete)
* Archive the project folder / documentation

**Project Planning and Execution Checklist**

The purpose of the **Project Planning and Execution Checklist** is to help guide Project Managers thru the 5 phases of the Project Management process. Utilizing Loyola’s “best fit” approach to Project Management, not every component of the checklist may need to be addressed in every project. Additional components may be used by the Project Manager as they are deemed necessary and required by their project. The key “components” of each Project Phase are outlined below:

**Origination Phase:**

The processes within this phase are focused on defining the need and getting the project prioritized and approved. Once the project has been approved, it officially becomes a project and a project manager can be assigned. Activities can begin in earnest to work on the project.

**Initiation Phase:**

The processes within this phase are focused on defining and organizing the new project. Within this phase the scope is beginning to be defined, as well as any needed budget requirements. Project member roles and responsibilities are identified, as well as the overall Project Sponsor and key impacted stakeholders. Key deliverables of this Phase are the Project Kick-off meeting, the accepted Project Definition document and the development of an initial Communication Plan. The Project Kick-off meeting and Project Definition document identify “at a high-level” what the project is all about. The Project Definition doc. Helps to set expectations with the Sponsor, Stakeholders and the project team. Development of a Communication Plan helps to identify who needs to see what and when regarding project updates and status report. In this Phase, how the project will be completed is not as important as what the project is about and who will be involved.

**Planning Phase:**

The processes within this phase are focused on defining the total scope of the effort, defining and refining the objects and developing the plans to meet those objectives. All of the efforts within this Phase are geared toward developing a project schedule and identifying how the project will be completed. During this Phase, development of the project documentation is a dynamic process. As more and more information is gathered and developed, the planning documents will continued to be updated based on the newly obtained information. The key deliverable of this Phase is the Project Schedule. Development of a Project Schedule helps to identify potential resources constraints or conflicts with other project priorities. It also helps to communicate the timing of activities to the Project Sponsor and Stakeholders and set expectations for when the project will be completed. In this Phase, how the project will be completed is what’s important.

**Execution Phase:**

The processes within this phase are focused on monitoring and controlling the project. These activities are entirely focused on completing the project activities, managing Sponsor and Stakeholder expectations and keeping the project on track to completion as planned. Managing issues, risk and communications is key. Monitoring the Project Schedule and identifying possible schedule slippage issues is a key project management activity. Frequent communication with the Sponsor and Stakeholders prevents “surprises” from negatively impacting the project’s outcome. Utilizing more structured Quality Assurance processes helps to ensure that the project is completed with the likelihood that there will be fewer defects.

**Close-Out Phase:**

The processes within this phase are focused on ensuring that all project activities have been completed and that the Sponsor’s expectations, needs and requirements have been met. Early identification of the Sponsor’s Critical Success Factors and tracking them thru the Planning and Execution phases helps to ensure a successful completion to the project. “Key” deliverables of this Phase are the completion of the Project Close-out Report and holding a Project Close-out meeting. Project Team’s should use these 2 deliverables to identify what worked well during the execution of the project and what could have gone better. This feedback can be used on future projects to help those projects run more smoothly.