

The following Outcomes are required for **all** projects. The method in which the Outcomes are obtained (completing Process Activity and Deliverables, or other approaches) may vary depending on the project itself or the size of the project. The outcomes and general order of outcomes should match the Process Agreement. Please contact PMCE for assistance.

**Start IT Process Group:** The activities that facilitate the authorization of a new project, provide high-level definition of the project, and identify stakeholders.

Outcomes	Large/Medium	Small	Process Activity	Deliverables
<b>Project Request</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Request is formally submitted for review with appropriate business case information.	Project Request
<b>Identified Stakeholders</b>	<b>Deliverable required</b>	Do you know all the stakeholders impacted by the project and what their needs are? <ul style="list-style-type: none"> <li>If yes, document the stakeholders in the Project Charter</li> <li>If no, complete process activity and deliverable</li> </ul>	Stakeholder Discussions: Obtain a clear understanding of all stakeholders impacted by the project and what their needs are.	Stakeholder Matrix
<b>Defined Purpose, Goal, Objectives</b>	<b>Deliverable required</b>	Do you know the projects goal, purpose and objectives? <ul style="list-style-type: none"> <li>If yes, document the goal, purpose and objectives in the project charter</li> <li>If no, complete process activity and deliverable</li> </ul>	Conduct a LFA workshop to create stakeholder buy-in and identify the objective, measurements, and assumptions. Document results in the Logical Framework Approach (LFA) Matrix.	Logical Framework Approach Matrix_(LFA)
<b>Project Charter</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Document clearly defined project scope, stakeholders, objectives, and high-level milestones in the Project Charter.	Project Charter
<b>Project Charter Review</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Obtain approval from Project Sponsor, Executive Sponsor, and/or Program Governance Committee (PGC) for the utilization of state resources so that the idea or concept can be further planned out to determine if a plan is worth pursuing further.	Approved Project Charter
<b>Phase Gate Review</b>	<b>Deliverable required</b>  Review completed by Sponsor & PGC	<b>Deliverable required</b>  Review completed by the Project Sponsor and the selected Program Governance Committee (PGC)	Ensure the Project Sponsor has assessed that the initiating deliverables have been completed satisfactorily. The PGC will determine if the project has initiated properly and will receive the needed resources and support to properly plan out the project.	Phase Gate Review

**Plan IT Process Group:** The activities needed to plan and manage a successful project including defining the project scope, project cost, schedule, and quality metrics.

Outcomes	Large/Medium	Small	Process Activity	Deliverables
<b>Roles &amp; Responsibilities</b>	<b>Deliverable required</b>	Do you know the roles & responsibilities required for this project? <ul style="list-style-type: none"> <li>If yes, document the roles &amp; responsibilities in the Communication Matrix</li> <li>If no, complete process activity and deliverable</li> </ul>	Hold discussions with the Project Team and ensure the responsibility assignments for the project are clearly understood by all stakeholders. Record assignments in the Roles & Responsibility Document.	Roles and Responsibilities Document
<b>Communication Plan</b>	<b>Deliverable required</b>	Do you understand the communication expectations for this project? <ul style="list-style-type: none"> <li>If yes, document the communication plans in the Communication Matrix.</li> <li>If no, complete process activity and deliverable</li> </ul>	Understand the information needs of the stakeholders and document the communication expectations for all project stakeholders in the Communication Matrix.	Communication Matrix
<b>Defined present and future business processes</b>	<b>Deliverable required</b>	Do you understand what the future state would look like in order to determine what would need to be achieved to get there? <ul style="list-style-type: none"> <li>If yes, complete all future process maps</li> <li>If no, facilitate business process alignment workshops to complete process activity and deliverable</li> </ul>	Facilitate a process reengineering workshop to help stakeholders identify current and future business processes. Map out the future agreed upon process to understand potential efficiencies and benefits, to flesh out initial functional and technical requirements, and to ensure that the future business processes will be closely matched to and supported by the chosen technical solution.	Future Business Process Map

Outcomes	Large/Medium	Small	Process Activity	Deliverables
<b>Identified Requirements</b>	<b>Deliverable required</b>	Have the stakeholders identified all their individual requirements pertaining to their business process? (must have, should have, and nice to have requirements) Does the team understand all identified requirements and has each requirement been defined and owned so that the scope of the project can be defined? <ul style="list-style-type: none"> <li>• If yes, complete the Requirements Traceability Matrix</li> <li>• If no, complete process activity and deliverable.</li> </ul>	Hold requirements workshops to identify functional, technical, vendor, security, legal, compliance, and project requirements. These requirements are to be documented, defined, reviewed, approved and tracked in the Requirements Traceability Matrix.	Requirements Traceability Matrix
<b>Detailed Project Scope &amp; WBS</b>	<b>Deliverable required</b>	Is the Work breakdown Structure (WBS) defined and is the scope of the project clear with assigned deliverable owners? <ul style="list-style-type: none"> <li>• If yes, complete the WBS and Project Schedule</li> <li>• If no, complete process activity and deliverable</li> </ul>	Use the WBS workshops to create clearly a defined and understood scope of work with assigned deliverables and deliverable owners.	Work breakdown structure and Project Schedule
<b>Identified Risks and Risk Plans</b>	<b>Deliverable required</b>	Do you understand all business (operational), technical, resource and vendor risks associated with the project? <ul style="list-style-type: none"> <li>• If yes, document the risks in the Risk Assessment Map and fill out a Risk Response Plan for all high probability, high impact risks the Project Sponsor requires a plan for.</li> <li>• If no, complete process activity and deliverables</li> </ul>	Hold risk identification workshop with project team, sponsor, and key stakeholders and assess risks for level of probability and impact. Identify risk owners to determine mitigation strategies and contingency plans to decrease the potential probability and impact to the project. Obtain risk acceptances/approvals from appropriate stakeholders.	<u>Risks Assessment Map</u> Risk Response Plans
<b>Work Effort, Duration &amp; Resources Estimates</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Gather thorough time estimates with dependencies defined for all project activities and deliverables. Resources estimated for internal and external staffing. Document all this information in a project schedule.	Project Schedule
<b>Cost Estimates</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Gather accurate cost estimates of people, equipment, and services needed for a successful project and account for these in the PCW.	<u>Cost Estimating Worksheet</u>
<b>Success Criteria &amp; Quality Metrics</b>	<b>Deliverable required</b>	Do you understand the quality and control criteria that must be achieved for successful project completion? <ul style="list-style-type: none"> <li>• If yes, document the successful criteria and quality metrics in the Quality Metrics Matrix</li> <li>• If no, complete process activity and deliverable</li> </ul>	Define quality metrics to ensure delivered product meets quality assurance and control criteria for successful project completion. Use the LFA Indicators from the LFA Matrix to define these criteria.	Quality Metrics Matrix
<b>Procurement Matrix</b>	<b>Deliverable required</b>	Do you know if the project requires outside equipment or vendor resources? If so, how do you know the approach to procure equipment or vendor services? Do you have a clear understanding of the scope of work they will perform and which requirements they will be fulfilling? <ul style="list-style-type: none"> <li>• If yes, contact State Procurement Office and ensure appropriate contracts are in place</li> <li>• If no, complete process activity and deliverables</li> </ul>	Conduct a procurement workshop to discuss the type of procurement required and identify potential suppliers or vendors. Plan procurement activities and execute them to select vendor(s) to assist in the project. Use the appropriate State SPO procurement documents and process to properly document procurement information, the procurement approach and procurement decisions.	Procurement Matrix  State Procurement Documents
<b>Phase Gate Review</b>	<b>Deliverable required.</b>  Review completed by PGC	<b>Deliverable required</b>  Review completed by Program Governance Committee (PGC).	Assess completion of required planning deliverables and ensure these are uploaded into the SharePoint PGC site. Successful review by PGC will determine that the plan is satisfactory and the project can then move into Executing.	Phase Gate Review
<b>Project Management Plan Approval</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Obtain requested funds and governance approval to move forward into execution by the Program Governance Committee (PGC).	Approved Project Management Plan

**Do IT Process Group:** The activities to complete the work defined in the project management plan.

Outcomes	Large/Medium	Small	Process Activity	Deliverables
<b>Project Work Management</b>	<b>Deliverable required</b>	Are the project team and stakeholders meeting regularly and using a meeting agenda and taking notes to accurately document what is being covered and what happened in the weekly meetings? <ul style="list-style-type: none"> <li>• If yes, continue documenting meetings using the agenda and notes.</li> <li>• If no, start completing the process activity and deliverables.</li> </ul>	Hold regular project team meetings to manage and direct the project work/deliverables. Provide meeting agendas before the meetings to communicate intended purpose and a recap of the outcomes, decisions, and new action items in the meeting notes. Changes in activities may result in project schedule updates.	Meeting Agenda and Notes
<b>Decisions and Issues Management</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Manage and properly document decisions, issues and action items. Maintain these logs throughout the project and follow up with the decision, issues and action item owners, if more information is necessary.	Decision Log Issues Log Action <u>Items Log</u>
<b>Stakeholder Management</b>	<b>Deliverable required</b>	Are stakeholders properly informed about the status of the project? <ul style="list-style-type: none"> <li>• If yes, provide project status updates to stakeholders in accordance to the communication plan</li> <li>• If no, complete process activity and deliverables</li> </ul>	Utilize the project status reports and communication matrix to communicate with stakeholders to meet their needs and address issues as they occur. This may help to ensure they remain engaged throughout the project.	Project Status Reports
<b>Production Readiness</b>	<b>Deliverable required, as applicable</b>	For technology projects only: Are all production support stakeholders (Business unit, technical support, & user) prepared for implementation with appropriate contingency plans? <ul style="list-style-type: none"> <li>• If yes, ensure proper documentation</li> <li>• If no, complete process activity and deliverables</li> </ul>	If applicable, create testing plans & scripts and training plans & guides. Update any pertinent documentation related to policies and procedures, user guides, and technical information.	<ul style="list-style-type: none"> <li>- Testing Plans &amp; Scripts</li> <li>- Transition Plan</li> <li>- Training Plans &amp; Guides</li> <li>- Implementation/Back-out Plans</li> <li>- Document Updates                             <ul style="list-style-type: none"> <li>o Policies &amp; Procedures</li> <li>o User Guides</li> <li>o Technical                                     <ul style="list-style-type: none"> <li>▪ Hardware/Software/Integration Diagrams</li> <li>▪ Maintenance Procedures</li> <li>▪ Re-Run/Restart Procedures</li> <li>▪ Application Recovery Plans</li> <li>▪ Disaster Recovery Plans</li> </ul> </li> </ul> </li> </ul>
<b>Phase Gate Review</b>	<b>Deliverable required.</b>  Review completed by Operations Review Board (ORB)	<b>Deliverable required</b>  Review completed by Business Lead, Technical Lead, Project Sponsor and Project Manager (Project Leadership Team – PLT).	Successful operational review by Project Sponsor, Project Manager, Business Lead and Technical Lead and other identified ORB members to determine if all executing work has been satisfactorily completed and the project can move into production for roll-out until Executing is completed.	Phase Gate Review

**Tune IT Process Group:** The activities required to track, review, and regulate the progress and performance of the project.

Outcomes	Large/Medium	Small	Process Activity	Deliverables
<b>Project Work Monitored</b>	<b>Deliverable required</b>	Are you properly tracking the progress of the project and communicating the status to stakeholders? <ul style="list-style-type: none"> <li>• If yes, provide appropriate updates to stakeholders in accordance to the communication plan</li> <li>• If no, complete process activity and deliverable</li> </ul>	Monitor and control the project work by tracking, reviewing, and regulating the progress to meet the performance objectives defined in the project management plan. Also communicate the status of the project to the project team, sponsor, and stakeholders.	Project Status Reports
<b>Change Control</b>	<b>Deliverable required</b>	Are the changes in your project being formally requested, analyzed, and approved by the appropriate decision makers? <ul style="list-style-type: none"> <li>• If yes, ensure change request forms are archived appropriately</li> <li>• If no, complete process activity and deliverable</li> </ul>	Ensure change request forms are submitted for changes that affect performance baselines (scope, quality, time, and cost), analyze impacts to ensure changes to the project are beneficial, and obtain approvals.	Change Request Form Change Control Log

Outcomes	Large/Medium	Small	Process Activity	Deliverables
<b>Risk Control</b>	<b>Deliverable required</b>	Are identified risks being monitored properly, are new risks arising during the project or are foreseen risks occurring? <ul style="list-style-type: none"> <li>If yes, complete process activity and deliverable</li> <li>If no, proceed with project as planned</li> </ul>	Document and track risks in the risk log, ensuring new risks are identified and accounted for. Monitor project issues and risks throughout the project life cycle utilizing Risk Response Plans for those risks that occur and developing Risk Response Plans for those that hadn't been identified previously.	Risk Log
<b>Quality Control (Approve Deliverables)</b>	<b>Deliverable required</b>	Are you certain deliverables are properly completed and meet quality standards? <ul style="list-style-type: none"> <li>If yes, proceed with project as planned and document in completed deliverables section of Project Closing Report</li> <li>If no, complete process activity and deliverable</li> </ul>	Assess completeness and quality of project deliverables against the Work Breakdown Structure, and the success criteria in the Quality Metrics Matrix. Obtain approval and sign-off of deliverables in the Deliverable Sign-off portion of the Project Closing Report or perform re-work and change control processes, as necessary.	Deliverables Sign-off Documented in Project Closing Report
<b>Scope Verification (Validate Requirements)</b>	<b>Deliverable required</b>	Have requirements been tested, approved, and fulfill the project scope? <ul style="list-style-type: none"> <li>If yes, proceed with project as planned</li> <li>If no, complete process activity and deliverable</li> </ul>	Obtain formal acceptance of the completed project deliverables with the PLT (Project Leadership Team) ensuring all requirements are met.	Refer back to Requirements Traceability Matrix

**Close IT Process Group:** The activities needed to finalize all activities across all Project Management Process Groups.

Outcomes	Large/Medium	Small	Process Activity	Deliverables
<b>Lessons Learned &amp; Evaluations</b>	<b>Deliverable required</b>	What lessons learned throughout the project will help future projects run more smoothly? <ul style="list-style-type: none"> <li>Complete process activity and deliverable</li> <li>Then proceed with other closing activities</li> </ul>	With the project team, assess and measure the success of the project and determine and document lessons learned. These are meant to help with future projects which will avoid similar issues from arising, create practices to duplicate successes and ensure consistency.	<u>Document Lessons Learned in the Project Closing Report</u>
<b>Validated Project Benefits</b>	<b>Deliverable required</b>	Did the team meet the project success criteria documented in the Quality Metrics Matrix? How do we know we will gain the benefits we sought out to obtain by completing this project? <ul style="list-style-type: none"> <li>If yes, document in the Quality Metrics Matrix and continue to close project</li> <li>If no, complete process activity and deliverable</li> </ul>	Once the project is complete, compare success criteria to project results to validate if intended benefit and value for the project was achieved if it can be measured at the close of the project. This should be documented in the Quality Metrics Matrix. If success cannot be measured until a certain timeframe after the closing date of the project, make this an outstanding action item in the Project Closing Report to ensure the project benefits are validated	Updated Quality Metrics Matrix Add to Outstanding Action Items in Project Closing Report
<b>Project Team Assessment</b>	<b>Deliverable required</b>	Have you evaluated the team's performance and asked for feedback? <ul style="list-style-type: none"> <li>If yes, continue to close project</li> <li>If no, complete process activity and deliverable</li> </ul>	Complete project team evaluations for performance to capture ways in which the team worked well together, and ways the team can improve in future projects.	Team Member Assessment
<b>Closed Procurement</b>	<b>Deliverable required</b>	Did you use a contractor or vendor? <ul style="list-style-type: none"> <li>If yes, complete process activity and deliverable</li> <li>If no, continue to close project</li> </ul>	Document and obtain approval of vendor performance and deliverables sign-off, contract changes, disputes, and outstanding items. If vendor performance is completed satisfactorily with quality deliverables signed off, close the contract, pay the vendor, and complete all procurement documentation.	Procurement Sign-off Document in Project Closing Report
<b>Closed Project</b>	<b>Deliverable required</b>	<b>Deliverable required</b>	Obtain Sponsor sign off, meaning the acceptance of all project deliverables. Ensure all agreed upon outstanding action items are transferred to the Business Process Owner. Formally meet with the team to close the project and communicate project closing to stakeholders via issuing the Project Closing Report. Optional - present the Project Closing Report to stakeholders during a stakeholder Project Closing Meeting and utilizing the Project Closing PowerPoint template.	Project Closing Report Presentation Template