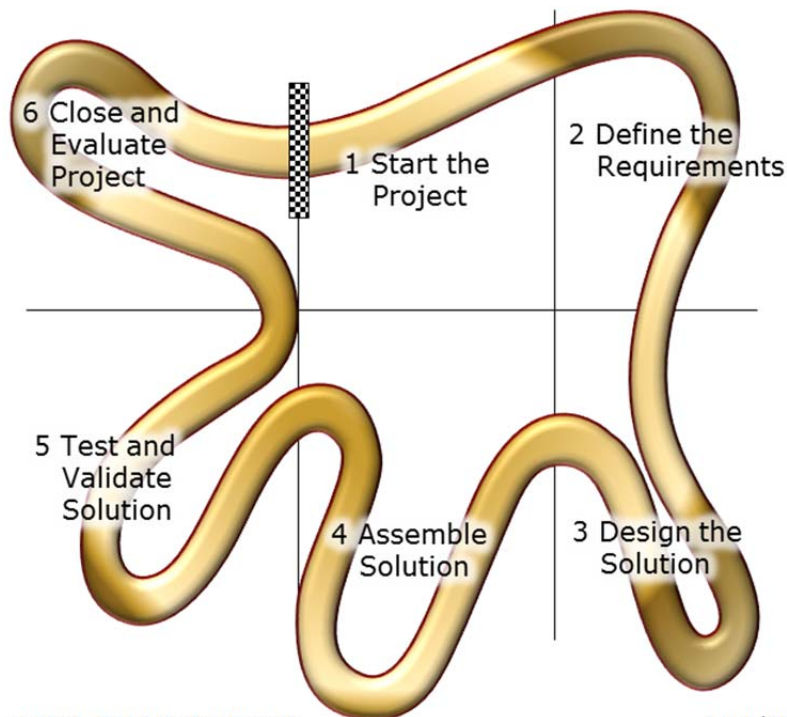


## Descriptions: Project Participant Roles and Reviewers

Sponsor	The Sponsor is the Decision-Maker who funds the project, assures it meets the business needs, represents the project in the executive suite, and rewards the team. Ideally, the Sponsor is an executive in the same business unit as the Customer. A project can have multiple sponsors, but their responsibilities must be clear to all.
Customer	The Customer represents the group that will receive business benefits from the project. The Customer may be internal and/or external, and include managers, supervisors, and/or staff. Ideally, one person is the single point of contact for all Customers and can speak for Customer management.
Project Manager	The Project Manager is the person who manages the process of planning the project (structuring, assigning, estimating, and scheduling), controlling its progress (status tracking, change control, reporting and closing), and leading and inspiring the team (ideally with assistance from the Sponsor, Customer, and/or Resource Managers).
Team Members	Team Members are leaders of the activities in the project. The Team Members have the skills, committed time, creativity, excitement and sense of ownership needed to help plan, track, and complete the overall project, as well as their individually assigned project activities, including keeping the Project Manager informed about progress and potential problems.
Resource Manager	The Resource Managers are managers one and two levels up from the project participants. They prioritize project work, participate in Project Reviews, and provide staff with the skills the project needs to be efficient and effective. They block interruptions, and provide an effective project working environment so the team can keep momentum.
Experts	Experts are those people inside and outside the organization who are not part of the team, but are called upon by the team to provide coaching or reviews in their area of expertise. Experts' job is to make sure the team has timely benefit of their expertise. Examples include Purchasing, Human Resources, Legal, Technology, Project Office, or Instructional Design.
Reviewers	Those who evaluate the quality of results of project work. At minimum, there are four types of reviewers, as follows: S=Sponsor; C=Customer; M=Manager; E=Expert (subject area expert or technical expert).

MinProj is our universal minimum project management method, compatible with our other PM methods, and supported with our training and coaching services. To see our other products and services, go to [www.projectexperts.com](http://www.projectexperts.com), or contact us at +1.719.488.3850 (USA).



# MinProj @ GLANCE

**MinProj** is the minimum Project Management method you need for any medium or large project. It includes:

- Phases, Results & Activities (Work Breakdown Structure) Project Management and Business Improvement actions
- Result Templates for each Activity and Phase
- Recommended Roles
- Success Factors for each Phase
- Recommended Reviews and Reviewers
- Templates for popular PM and Spreadsheet software
- Worksheets for activity planning and documentation

**MinProj @ Glance**

**R column** shows Reviewers: S=Sponsor, C=Customer, M=Manager, E=Experts.

WBS	Phase/Activity	PB	Responsible, involved	Results	Success Factors	R
1	Start the Project			Initial Plan, containing Charter, Preliminary Project Plan	In addition to below, get Approval with commitments of resources needed to continue.	
110	Start the Project and Form Team	P	Sponsor, Project Manager, Customers, Team, Resource Manager	Project Charter with Business Need, Product Description, and Resource Commitments	Get the right Sponsor, high Customer involvement, and an effective project manager; make the kick-off fun!	
130	Analyze the Problem or Opportunity	B	Project Manager, Customers, Team	Problem or Opportunity Analysis, Stakeholders, Expansion of Understanding of Business Needs	Get access to all stakeholders; identify clear what/why/who in results.	
150	Define Scope and Objectives	PB	Project Manager, Customers, Team	Initial Scope Description or Measurement, Project Objectives, Business Justification	Set "Why" or business-impact-oriented objectives and measurable scope.	C
191	Lead and Manage This Phase	P	Project Mgr, Sponsor, Resource Mgrs, Team	Well-Managed Project	<i>Delegate</i> the PM actions in which you are <i>least</i> effective—and master them.	
199	Approve Results and Plan the Next Phases	P	Project Manager, Team Customers, Resource Managers, Sponsor	Next Phase Plan, Staffing Commitments; [Optional] Preliminary Effort, Cost and Duration Estimates	Entire team participates in estimates; recognize that estimates & schedules will change with more information.	S C M

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WBS	Phase/Activity	PB	Responsible, involved	Results	Success Factors	R
6	Close and Evaluate Project			Business Benefit; Documented Lessons Learned, and Project History	In addition to below, <b>make sure you Do</b> this phase. Less-successful teams skip it, and go on to new projects.	
610	Verify You Met the Business Needs	B	Sponsor, Customers, Resource Managers, Project Manager	Measured Business Benefit, or Plan for doing so; or, reasons why no benefit	Do Problem/Opportunity Analysis and get clear Objectives in the First Phase.	S C M
630	Evaluate Solution and Process	P	Customers, Sponsor, Resource Managers, Project Manager, Team	Follow-on improvements to solution, and to project process; completed Lessons Learned; skill building of team members	Complete open Change Requests, and respond to new ones by staffing a "Warranty Period." Record and re-use Lessons Learned in next project.	
650	End Project and Celebrate	P	Sponsor, Customers, Resource Managers, Project Manager, Team	Closure and happy people.	Invite the Project Team, Experts, and others who contributed to success to a celebration.	
670	Initiate Warranty Support	P	Team	Rapid correction of any defects found during warranty period	Keep some core team members on hand for rapid warranty support.	
691	Lead and Manage This Phase	P	Project Mgr, Sponsor, Resource Mgrs, Team	Well-Managed Project	<i>Delegate</i> the PM actions in which you are <i>least</i> effective—and master them.	
699	Perform Post-Project Evaluation	P	Sponsor, Customers, Project Manager, Resource Managers	Proven Business Benefit; recognition as an effective Project Manager	Wait 25% of project duration, or at least 3 months, to do Post-Project Evaluation.	S C M

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WBS	Phase/Activity	PB	Responsible, involved	Results	Success Factors	R
5	<b>Test and Validate Solution</b>			Tested, fine-tuned Solution; documented Test Plan and Results	In addition to below, make sure you have good Requirements; make sure Customers have time & testing skills.	
510	Test the Solution	B	Customers, Testing Experts, Team, Proj Mgr	Tested, validated Solution, and Customer agreement that it is so	Develop a good test plan during Design, then follow it.	C E
530	Fine-Tune the Solution	B	Team	Rapid correction of any glitches or defects found during testing	Fast turnaround keeps momentum.	
550	Integrate the Solution into the Enterprise	B	Customers, Team	A well-implemented solution, accepted by those who will use it	Begin organizational Change Management during Design.	
570	Verify You Met the Requirements	B	Customers, Sponsor, Project Manager	Customer agrees Requirements were met, or at most two iterations to add requirements that were cut-off in Design	Customers were involved with Requirements, Design, and Testing. If needed, use this activity to complete missing requirements.	S C
591	Lead and Manage This Phase	P	Project Mgr, Sponsor, Resource Mgrs, Team	Well-Managed Project	<i>Delegate</i> the PM actions in which you are <i>least</i> effective—and master them.	
599	Approve Results and Plan the Last Phase	P	Project Manager, Team Customers, Resource Managers, Sponsor	Updated PM Plan; detailed last phase plan; approval to continue	Set expectations about project completion rewards and celebration.	M

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WBS	Phase/Activity	PB	Responsible, involved	Results	Success Factors	R
2	<b>Define the Requirements</b>			Requirements Document and first reliable Project Plan	In addition to below, make sure all Customers, not just representatives, approve requirements.	
210	Understand the Current Processes	B	Customers, Team	Existing Situation Analysis, Internal to the enterprise	Involve people who will be affected to get early commitment.	
230	Study External Options	B	Customers, Team	External Analysis, including market and competitors	Buy the solution, if you can; use this step to research what is available.	
250	Define Requirements for the Solution	B	Customers, Team, Project Manager	Graphic and Narrative Requirements: Functions, Performance, Information, Constraining and Subjective	Use facilitated sessions with all staff from a business area participating. Clarify requirements with pictures and words. Involve all Customers.	C E
270	Prioritize the Requirements	B	Customers, Project Manager [Sponsor]	Minimum Requirements to meet Business Need, plus Additional, with Benefits Listed	Distinguish between Needed Now / Needed Future / Wanted to reduce multiple Priority 1's.	S C
291	Lead and Manage This Phase	P	Project Mgr, Sponsor, Resource Mgrs, Team	Well-Managed Project	<i>Delegate</i> the PM actions in which you are <i>least</i> effective—and master them.	
299	Approve Results and Plan the Next Phases	P	Project Manager, Team Customers, Resource Managers, Sponsor	Updated Project High-Level Plan, Detailed Next Phase Plan; approval to continue	Implement Change Control Plan; keep a trail of changes to the plan.	S C M

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WBS	Phase/Activity	PB	Responsible, involved	Results	Success Factors	R
3	<b>Design the Solution</b>			Design Document; updated Project Plan	In addition to the below, your Customer should select the solution and is involved in Test and Validation Plan.	
310	Identify Potential Solutions	B	Team, Customers	Multiple viable options, and the strengths and weaknesses of each	Clear alternatives and good analysis of each.	
320	Evaluate Alternatives and Select One	B	Customers, Sponsor, Project Manager, Team	Selected alternative, and justification for it	Understanding of the risks and opportunity of the selected solution.	E C
330	Acquire and Install the Solution	B	Legal, Purchasing, Customers, Team	Acquired and installed solution, if the solution or part of it will be purchased	Validate solution against criteria (requirements or test data) before making any changes to it.	
350	Design Solution Details	B	Project Manager, Team, Customers, Experts	Details to meet the requirements, with interfaces. The first full list of activities to finish the project	Involve those who will be involved in all remaining project activities.	
370	Develop the Test and Validation Plan	B	Project Manager, Customers, Team	Test and Validation scripts, data or information, and assignments	Identify all resources (human and equipment) needed for validation.	
391	Lead and Manage This Phase	P	Project Mgr, Sponsor, Resource Mgrs, Team	Well-Managed Project	<i>Delegate</i> the PM actions in which you are <i>least</i> effective—and master them.	
399	Approve Results and Plan the Next Phases	P	Project Manager, Team Customers, Resource Managers, Sponsor	Full PM Plan, with Detailed Phase Plans for the rest of the project; and approval to proceed	Use this Milestone (phase completion) as a celebration.	S C M

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WBS	Phase/Activity	PB	Responsible, involved	Results	Success Factors	R
4	<b>Assemble the Solution</b>			Completed solution, ready to test, with documentation and training	Make sure the team doesn't "run out of gas" during or after this phase.	
410	Build or Adapt the Solution	B	Team, Customers	Completed solution, either assembled or developed	All preceding phases, if done well, ensure success in this activity.	
	410.1 your detail 410.2 your detail 410.n etc.		Team	Assignable details of activity 410, based on the work you completed in activities 350 and 399	Plan the details to 20-40 hour assignments of work, each one done in 2 weeks elapsed time.	E
430	Document Solution Use	B	Customers, Team, Writer	Paper or electronic trail for the solution process, and its use	Get a new business user to develop documentation, get the team to help.	C opt
450	Teach Solution Use	B	Customers, Team, Instructional Designer, Class Facilitator	Initial or entire business group trained in use of solution, ready for testing and validation	Draft managers as coaches or mentors; provide for training of new business group members.	C opt
470	Prepare the Organization for Change	B	Customers, Project Manager, Sponsor	An organization that embraces the change, and is prepared for it	Involve your Human Resources group to evaluate changed responsibilities.	
491	Lead and Manage This Phase	P	Project Mgr, Sponsor, Resource Mgrs, Team	Well-Managed Project	<i>Delegate</i> the PM actions in which you are <i>least</i> effective—and master them.	
499	Approve Results and Plan the Next Phases	P	Project Manager, Team Customers, Resource Managers, Sponsor	Update of PM Plan and of Detailed Phase Plans for rest of the project; approval to continue	Build a plan for quick closure of remaining phases to assure their completion.	M

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