Project Plan

Project Information

Project Name

This project will be referred to as the PJ Enterprises Customer Service Training.

Project Description/Overview

PJ Enterprises has contracted START to provide a learning solution that will assist the organization in meeting its goals of (a) maintaining or exceeding projected targets, (b) maintaining profitability, (c) improving customer service scores by 10%, and (d) increasing the quality of work environment through staff development. Having reviewed a gap analysis with the project sponsor, START agrees to develop and deliver an instructor-led customer service training that can be maintained by PJ Enterprises' staff upon completion of the project. This program will also be supported by the development of a searchable electronic product guide.

Project Purpose

START aims to reduce call time by increasing the accessibility of product information through an electronic format and standard categorization. Reduced call time will both increase customer satisfaction and drive sales.

START also intends to address the 30% increase in customer service complaints by creating and implementing instructor-led customer service training for telephone operators and customer service supervisors.

Business Objectives

The improvement in customer satisfaction will assist PJ Enterprises with meeting their business objectives of maintaining or increasing profitability, maintaining or exceeding projected targets, and improving customer-service scores. More specifically, START aims to:

- Equip telephone operators to move from 2-3 calls per hour to 4-5 calls per hour.
- Decrease customer service complaints by 10%.
- Increase sales by a minimum of 10%.

Scope Statement

Deliverables Included

To develop Customer Service Training, START will deliver several documents:

- The Project Plan, this document, outlines the logistic plans for the project including work breakdown structure, Gantt chart, schedule, change management, risk management, and communications plans.
- The PDF Product Guide Design Document provides a conceptual outline and templates for formatting the coming season's product guide as a searchable electronic document.
- The Customer Service Training Design Document describes the purpose, approach, and structure of the 8-hour customer service-training program. Program objectives, assessments and instructional strategies will be outlined and revised in this document to ensure efficient use of the project's development resources moving forward.
- The Course Materials include the following two electronic print masters:
    - The Facilitators' Guide Master includes a big picture summary of the training objectives and approach, instructor notes for all presentation slides, and directions for leading all skills practice and group activities.
    - The Student Materials Master includes all student handouts and reproducible job-aids.
- The Finalized PDF Product Guide will be available to TOs over PJ Enterprises' intranet and provide improved product information access by way of a table of contents navigation system and keyword text-search functionality.
- The Program Evaluation Report will analyze the initial impacts of the training by comparing data on performance metrics before and after training implementation.

Exclusions

START will not provide:

- Graphics or copywriting for the product guide.
- Direct instruction regarding specific products.
- Printing services for hard-copy materials.
- Audio and video projection equipment for the training.
- Program evaluation following the initial report.

Project Completion Criteria

The project is considered completed when all deliverables are signed-off by the project sponsor, the initial 5 training sessions are complete, and future PJ Enterprises trainers have completed their trainer validation.

Project Plans

Primary Plans

Project operations will be guided by a variety of formal plans including:

- Work Schedule
- Budget
- Communication plan
- Change Management plan
- Risk Management plan

Scheduled Meetings

Meeting	Frequency	Description
Project Team Meeting	Weekly	This briefing meeting is led by the Project Manager with a standard agenda including: • Work status reports, • Change requests updates • Group trouble-shooting, All members of the START project team attend and the Project Sponsor is invited to attend as needed.
Instructional Design Team Meeting	Every other week	The Instructional Designer leads this training design and development workgroup. Work assignments are reviewed and design decisions are made in this meeting. The project manager and content contributors attend all meetings and SMEs are invited to join as needed to inform the development process.
Project Operations Team Meeting	Every other week	The Project Manager leads this operational workgroup. Issues related to the project schedule, budget, scope and risk are addressed in partnership with the Project Sponsor, Business Analyst, and Project Coordinator.

Meeting	Frequency	Description
Change Control Board	Monthly or as needed for urgent requests.	As per the Change Management Plan, the Project Sponsor chairs the CCB. Formal change requests are reviewed and submitted for approval.

Scheduled Status Reports

In addition to the meeting status reports listed above, the project manager will provide weekly status summaries to the project sponsor each Thursday.

Assumptions

START is responsible for:

- Developing all deliverables - PDF product guide, training plan and instructional materials.
- Delivering 5 complete versions of the 8 hour TO/CSS training: 1st/2nd halves for AM shift staff; 1st/2nd halves for PM shift staff; mentored instructor make-up session
- Ensuring accessible information in PDF product guide by developing new organizational structure of content and including a table of contents with content hyperlinks and text-search capabilities
- Managing project deliverables and providing PJ Enterprises' Project Sponsor regular status reports.
- Timely completion of the project.
- Monitoring and adhering to the project budget and schedule.
- Keeping the Project Sponsor informed of any issues that may impact the timely and successful completion of the project.

PJ Enterprises is responsible for:

- Reviewing all materials, in a timely manner, to ensure that they are accurate and complete.
- Providing suitable equipment and space to deliver training as outlined in the design document.
- Working with START to determine an acceptable development and training schedule.
- Providing START with appropriate Subject Matter Experts to inform development and provide examples used in the training.
- Providing START with all necessary source materials in a timely manner.
- Establishing the training rollout schedule and scheduling shifts to ensure that all telephone operators and customer service supervisors are able to attend.

- Printing and assembly of all hard-copy course materials.
- Updating the PDF product guide after initial production and sign-off.
- Ensuring the product guide is accessible on all TO and CSS workstations.

Constraints

Schedule constraints for this project include:

- TOs need to be trained and ready for the release of the third-quarter catalogue at the end of August 2016.
- Project team members have planned vacation periods within the project's time line that will be taken into account when projecting completion dates.
- The shift-work nature of the PJ Enterprises employees will affect their availability for input, reviews, and training.

Cost constraints for this project include:

- START agrees to work within an estimated budget of less than $74,000 for all billable expenses.
- Materials production and potential overtime pay will also impact the overall budget available to this project.

Scope constraints for this project include:

- Staffing/Turnover will reduce the effectiveness of the training for the project.
- Information Services has minimal bandwidth to offer for launch and implementation of new technology resources that limits the scope of development for the electronic product guide.

External Dependencies

Increased call volume due to seasonal shifts may impact TO/CSS ability to attend scheduled trainings.

Project Approach

START will use a phased approach to the project. PJ Enterprises and START have initiated the project, and the planning phase is outlined in this Project Management Plan. START will follow the five phases of the ADDIE model - Analyze, Design, Develop, Implement and Evaluate - to successful completion. In addition, effective management of Risk, Change and Communication for the project's life cycle supports our phased approach, and the systems we will employ for each are outlined in this Plan.

The Customer Service Training project will follow the ADDIE model and will move through the following major phases:

- Analyze: The process of gathering information about the current and ideal states of performance and which needs are most important to address to meet those goals.

- Design: The process of establishing objectives and outlining a plan for development. All design documents are reviewed, revised, and signed off before moving into the next project phase.
- Develop: The process of creating usable materials and outlining procedures for implementation of the final project deliverables. All materials and procedure documents are reviewed, revised, and signed off before moving to the next phase of the project.
- Implement: The process of disseminating the developed materials launching any new procedures developed in the previous phase.
- Evaluate: The process of reviewing the project's impact and whether it met the stated goals.

Milestones

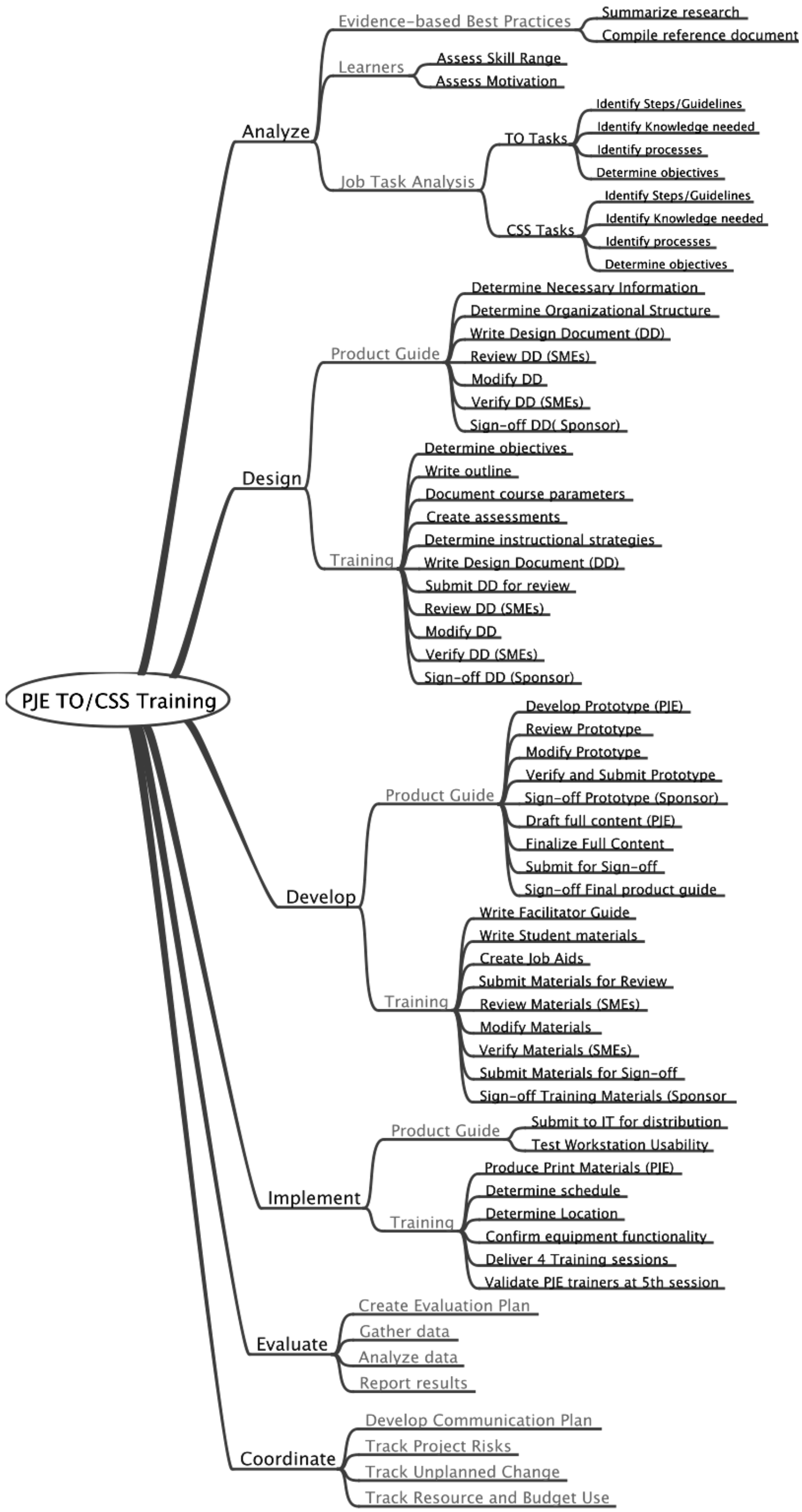
The table below describes the major approval points scheduled over the course of this project.

Milestone or Activity	Deliverable	Target Date
PDF Product Guide Design Document Sign-off: Agreement between both parties on the organizational structure, level of product detail, and review and revision methodologies for developing the product guide.	PDF Product Guide Design Document	April 19, 2016
Design Document for TO/CSS Trainings Sign-off: Agreement between both parties on course scope and sequence, instructional objectives, evaluation methods, and alignment of instruction with information gathered during the job task analysis.	Customer Service Training Design Document	May 3, 2016

Milestone or Activity	Deliverable	Target Date
PDF Product Guide Prototype Sign-off: Agreement between both parties on the actualized format of the product guide using a small list of products as a demonstration. This agreement ensures usability in terms of clickable table of contents navigation, and text-search functionality before PJ Enterprises builds all the content for the complete product guide.	PDF Product Guide Prototype	May 18, 2016
Final PDF Product Guide Sign-off: Agreement between both parties on product guide completion and readiness for implementation.	PDF Product Guide	July 6, 2016
TO/CSS Training Materials Sign-off: Agreement between both parties on the training curriculum, job aids, and facilitator guide.	Customer Service Training Course Materials	July 26, 2016
TO/CSS Training Implementation: START will facilitate 5 complete training sessions to allow all currently employed TOs and CSSs adequate access to the instruction.	Customer Service Training Instructor-led Classes	August 8-26, 2016
Training Evaluation Report Submission: START will develop and submit an initial report on training outcomes as outlined in the evaluation plan.	Evaluation Report	October 6, 2016

WBS Diagram

The diagram below represents the tasks necessary for successful completion of this project. A version of this chart is also available in Appendix A.



Schedule

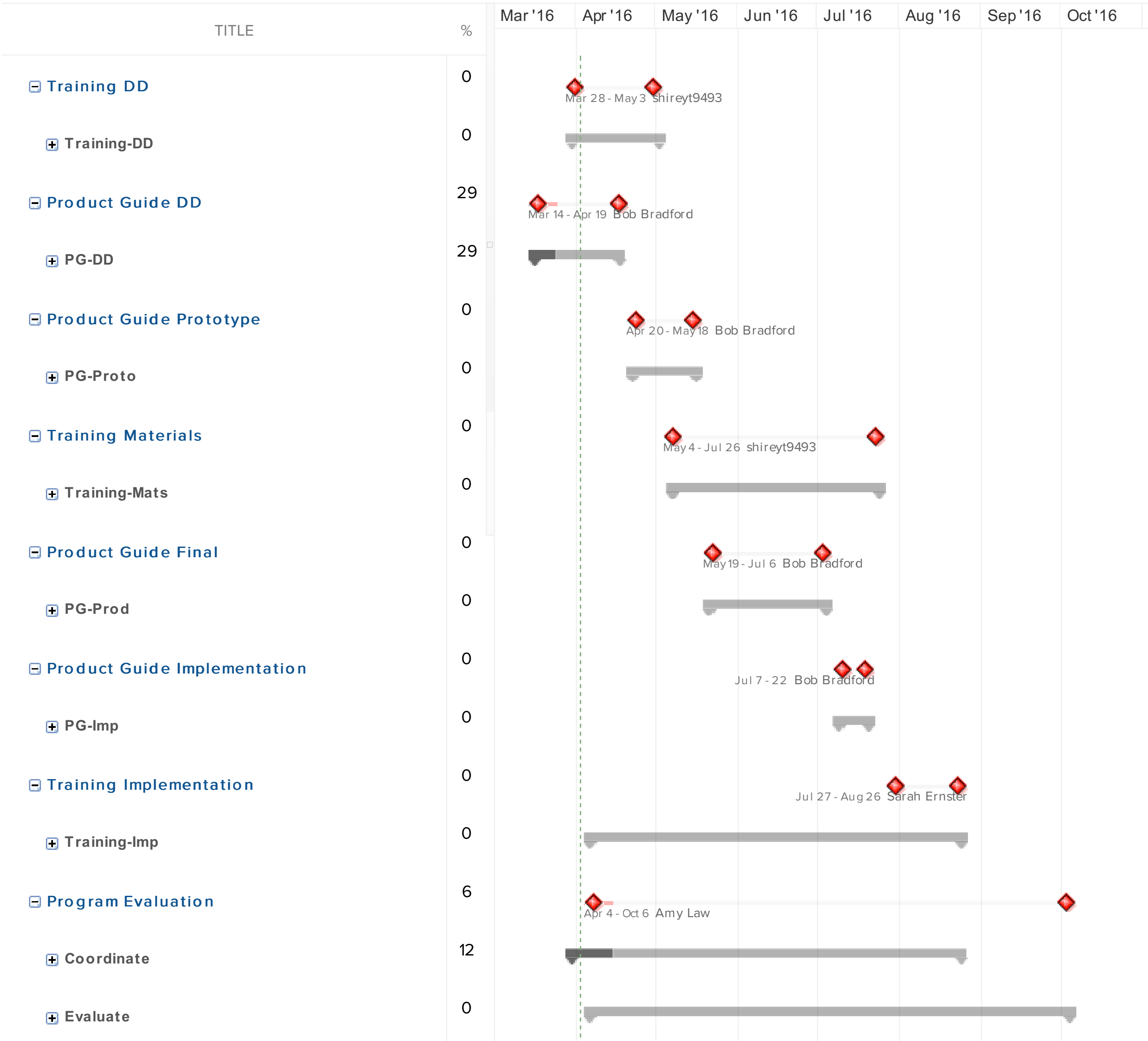
The table on this and the next page describes who will be responsible for the various project tasks and when those tasks should be completed for the project to remain on schedule.

TaskName	TaskListId	TaskOwner	StartDate	EndDate	Progress	Complete	Comments
Coordinate	1						
Develop Communication Plan	1.1	Sarah	28-Mar	3-Apr	85%		
Track Project Risks	1.2	Amy	28-Mar	26-Aug	10%		
Track Unplanned Change	1.3	Amy	28-Mar	26-Aug	10%		
Track Resource and Budget Use	1.4	Amy	28-Mar	26-Aug	10%		
Analyze	2						
Evidence-based Best Practices	2.1						
Summarize research	2.1.1	Teresa	14-Mar	25-Mar	100%	25-Mar	
Compile reference documentation	2.1.2	Teresa	14-Mar	25-Mar	100%	25-Mar	
Learners	2.2						
Assess Skill Range	2.2.1	Tyler	7-Mar	18-Mar	100%	18-Mar	
Assess Motivation	2.2.2	Tyler	7-Mar	18-Mar	100%	18-Mar	
Job Task Analysis	2.3						
TO Tasks	2.3.1						
Identify Steps/Guidelines	2.3.1.1	Tyler	14-Mar	25-Mar	100%	25-Mar	
Identify Knowledge needed	2.3.1.2	Tyler	14-Mar	25-Mar	100%	25-Mar	
Identify processes	2.3.1.3	Tyler	14-Mar	25-Mar	100%	25-Mar	
Determine objectives	2.3.1.4	Tyler	14-Mar	25-Mar	100%	25-Mar	
CSS Tasks	2.3.2						
Identify Steps/Guidelines	2.3.2.1	Tyler	14-Mar	25-Mar	100%	25-Mar	
Identify Knowledge needed	2.3.2.2	Tyler	14-Mar	25-Mar	100%	25-Mar	
Identify processes	2.3.2.3	Tyler	14-Mar	25-Mar	100%	25-Mar	
Determine objectives	2.3.2.4	Tyler	14-Mar	25-Mar	100%	25-Mar	
Design	3						
Product Guide	3.1						
Determine Necessary Information	3.1.1	Robert	14-Mar	18-Mar	100%	18-Mar	
Determine Organizational Structure	3.1.2	Robert	21-Mar	23-Mar	100%	23-Mar	
Write Design Document (DD)	3.1.3	Robert	23-Mar	25-Mar	100%	25-Mar	
Review DD (SMEs)	3.1.4	PJE SMEs	28-Mar	1-Apr	95%		
Modify DD	3.1.5	Robert	4-Apr	6-Apr			
Verify DD (SMEs)	3.1.6	PJE SMEs	7-Apr	13-Apr			
Sign-off DD(Sponsor)	3.1.7	Jane	14-Apr	19-Apr			
Training	3.2						
Determine objectives	3.2.1	Tyler	28-Mar	1-Apr	100%	3-Apr	
Write outline	3.2.2	Tyler	28-Mar	1-Apr	100%	3-Apr	
Document course parameters	3.2.3	Tyler	28-Mar	1-Apr	100%	3-Apr	
Create assessments	3.2.4	Tyler	4-Apr	5-Apr			
Determine instructional strategies	3.2.5	Tyler	6-Apr	7-Apr			
Write Design Document (DD)	3.2.6	Tyler	8-Apr	12-Apr			
Submit DD for review	3.2.7	Tyler	13-Apr	13-Apr			
Review DD (SMEs)	3.2.8	PJE SMEs	14-Apr	20-Apr			
Modify DD	3.2.9	Tyler	20-Apr	22-Apr			
Verify DD (SMEs)	3.2.10	PJE SMEs	25-Apr	28-Apr			
Sign-off DD (Sponsor)	3.2.11	Jane	29-Apr	3-May			
Develop	4						
Product Guide	4.1						
Develop Prototype (PJE)	4.1.1	Ray	20-Apr	4-May			
Review Prototype	4.1.2	Robert	5-May	6-May			
Modify Prototype	4.1.3	Robert	9-May	11-May			
Verify and Submit Prototype	4.1.4	Robert	12-May	13-May			
Sign-off Prototype (Sponsor)	4.1.5	Jane	16-May	18-May			
Draft full content (PJE)	4.1.6	Ray	19-May	13-Jun			
Finalize Full Content	4.1.6	Robert	14-Jun	24-Jun			

TaskName	TaskListId	TaskOwner	StartDate	EndDate	Progress	Complete	Comments
Submit for Sign-off	4.1.7	Robert	27-Jun	28-Jun			
Sign-off Final product guide	4.1.8	Jane	29-Jun	6-Jul			
Training	4.2						
Write Facilitator Guide	4.2.1	Tyler	4-May	25-May			
Write Student materials	4.2.2	Tyler	16-May	3-Jun			
Create Job Aids	4.2.3	Tyler	31-May	10-Jun			
Submit Materials for Review	4.2.4	Tyler	13-Jun	15-Jun			
Review Materials (SMEs)	4.2.5	PJE SMEs	15-Jun	21-Jun			
Modify Materials	4.2.6	Tyler	22-Jun	6-Jul			
Verify Materials (SMEs)	4.2.7	PJE SMEs	7-Jul	14-Jul			
Submit Materials for Sign-off	4.2.8	Tyler	18-Jul	20-Jul			
Sign-off Training Materials (Sponso	4.2.9	Jane	20-Jul	26-Jul			
Implement	5						
Product Guide	5.1						
Submit to IT for distribution	5.1.1	Robert	7-Jul	8-Jul			
Test Workstation Usability	5.1.2	Robert	11-Jul	22-Jul			
Training	5.2						
Produce Print Materials (PJE)	5.2.1	PJE	27-Jul	2-Aug			
Determine schedule	5.2.2	PJE	11-Jul	15-Jul			4 weeks in advance of trainir
Determine Location	5.2.3	Sarah	4-Apr	7-Apr			
Confirm equipment functionality	5.2.4	Sarah	2-Aug	4-Aug			
Deliver 4 Training sessions	5.2.5	Teresa	8-Aug	19-Aug			
Validate PJE trainers at 5th session	5.2.6	Teresa	22-Aug	26-Aug			
Evaluate	6						
Create Evaluation Plan	6.1	Tyler	4-Apr	12-Apr			
Gather data	6.2	Sarah	11-Jul	23-Sep			
Analyze data	6.3	Teresa	26-Sep	30-Sep			
Report results	6.4	Robert	3-Oct	6-Oct			

Gantt Chart

The Gantt chart below represents this project's design and development schedule at the category level. A version of this chart at the task level and including dependencies can be found in Appendix B.



Change Management Plan

Purpose

This Change Management Plan was created in order to define how changes during the project will be managed, the responsibilities and roles of the change control personnel, and the overall change management process. All stakeholders will be expected to submit or request changes to the Project Manager in accordance with this Change Management Plan and all requests and submissions will follow the process detailed below.

There are several types of changes that may be requested and considered. Types of changes may include:

- Scheduling Changes: may require altering the schedule depending on the significance of the impact.
- Budget Changes: may require requesting additional funding, releasing funding which would no longer be required, or adding to project reserves.
- Scope Changes: These changes may also impact budget and schedule. These changes may require a revision to WBS, the project scope statement, and other project documentation as necessary.

Goals

The goals of the Change Management Plan are to:

- Ensure changes are within scope and beneficial to the project
- Determine how the change will be implemented
- Manage the change as it is implemented

If these goals are met, PJ Enterprises and START will prevent unnecessary change from occurring and focus resources only on beneficial changes within the project scope.

Change Control Process

A Change Control Board (CCB) will include START Project Manager, START Business Analyst, START Instructional Designer and PJ Enterprises Project Sponsor. The purpose of the CCB is to review all change requests, determine their impacts on the project risk, scope, cost, and schedule, and to approve or deny each change request. The CCB is the approval authority for all proposed project changes.

The Project Manager will maintain a change log for the duration of the project. As change requests are submitted to the START Project Manager by the project team/stakeholders, the Project Manager will log the requests in the change log and the CCB will convene at the request of the Project Manager to review all change requests. For a change request to be approved, all CCB members must vote in favor. In the event more information is needed for a particular change request, the request will be deferred and sent back to the requestor for more information or clarification.

The Change Control Process will proceed through 4 phases; Generate, Evaluate, Authorize, Implement and will follow the procedures in the order detailed below.

1. Generate Change Request - Identify the need for a change (Stakeholders) – Change requestor will submit a completed Change Request (CR) form (available from Project Coordinator) to the project manager. Sample Change Request Form:

Element	Description
Date	The date the CR was created
CR#	Assigned by the Project Manager
Title	A brief description of the change request
Description	Description of the desired change, the impact, or benefits of a change should also be described
Submitter	Name of the person completing the CR Form and who can answer questions regarding the suggested change
Phone	Phone number of the submitter
E-Mail	Email of the submitter
Deliverable	The deliverable that the suggested change is for
Priority	A code that provides a recommended categorization of the urgency of the requested change (High, Medium, Low)

2. Project Manager logs change in the Change Management Register and updates change status throughout the process as needed. The project manager will keep a log of all submitted change requests throughout the project's life cycle.

3. Evaluate Change Request (Project Manager, Business Analyst, Instructional Designer, Requestor) – The project manager will conduct a preliminary analysis on the impact of the change to risk, cost, schedule, and scope and seek clarification from team members and the change requestor. START Business Analyst and/or Instructional Designer will gather information if further research is needed on change impact to project deliverables as requested by Project Manager. Project Manager prioritizes change request as High, Medium or Low and categorizes request into the following change Types: scope, time, duration, cost, resources, deliverables (training or PDF Product Reference), processes, and quality. Change request is then categorized in one of the following status types and noted in the change log: Open, In Progress, In Review, Denied or Closed by the Project Manager.

4. Submit change request to CCB (Project Manager) – The project manager will submit the change request, as well as the preliminary analysis, to the CCB for review.

5. Authorize Change Request - Obtain decision on change request (CCB) – The CCB will discuss the proposed change and decide whether or not it will be approved based on all submitted information. Project Sponsor (CCB Chair) has final approval on the change request. Upon approval, Project Manager and CCB Chair will sign a Change Management Plan Approval detailing

designated agreement, implementation plan, documentation and communication plan.

6. Implement Change Request (Project Manager) – If a change is approved by the CCB, the project manager will enter change in change log and update and/or re-baseline project documentation.

Responsibilities

The following are the roles and responsibilities for all change management efforts related to the project:

Person Responsible	Responsibilities
Amy Law, Project Manager	• Receive and log all change requests from project stakeholders • Seek clarification from change requestors on any open issues or concerns • Prioritizes and determines change category and status • Make documentation revisions/edits as necessary for all approved changes including Change Management Approval Form • Maintains the Change Management Register and change log • Participate on CCB
Tyler Shirey, Instructional Designer	• At request of Project Manager, conduct preliminary analysis of change request regarding deliverables • Participate on CCB
Teresa Catford, Business Analyst	• At request of Project Manager, conduct preliminary analysis of change request including risk, cost, schedule, and scope • Participate on CCB
Sarah Ernster, START Project Coordinator	• Provides Change Request Form to change requestor
Jane MacKenzie-Smith, Project Sponsor	• Approve all changes to budget/funding allocations • Approve all changes to schedule baseline • Approve any changes in project scope, • Signs Change Management Plan Approval

Person Responsible	Responsibilities
	Form • Chairs the CCB
Project Stakeholders: Bob Bradford - Technical Communications; Sarah Ernster - Project Coordinator, START; Mike Merrill, Sheena Perez, Ray Johnson, Lucy, Feldman, Sarah Commons, Maria Gomez - Reviewers and Subject Matter Experts, PJ Enterprises	• Submit all change requests to Project Manager on Change Request Forms • Provide all applicable information and detail on Change Request Forms • Be prepared to address questions regarding any submitted change requests • Provide feedback as necessary on impact of proposed changes

Appendix D - Change Request Form
Appendix E Change Control Form

Communication Plan

Purpose and Goals

The purpose of this communication plan is to outline the communication of this project to the stakeholders and staff of PJ Enterprises. In order to have a successful implementation, it is pivotal that the organization communicates in the upcoming changes in a timely manner and with a supportive and positive tone. Because this project will have major impact on the organization's processes and employees, it is important that all appropriate audiences and stakeholders are informed and compliant with the upcoming changes.

This communication plan will ensure that the communication regarding this project is consistent and cohesive, and that no message or audience is overlooked during the launch and implementation of this project.

Recommendations to PJ Enterprises on Messages to Address Impact of Project

START recommends that the following topics be communicated to the audiences listed below:

- Purpose for this training: why it is necessary and the overall goal
- Timeline (duration) and content of the training
- Benefit for PJ Enterprises as a whole organization
- Benefit for the intended audience (TOs and CSSs)
- PJ Enterprise's plan to support this training and those involved

- Expected changes during and after the training
- Expectations or responsibilities of involved parties

Challenges and Opportunities

Audience	Challenge	Message to address challenge	Channel	Responsible	Date
Mike Merrill	Concerned about how training was chosen; how changes affect the “bottom line.”	The results of the needs analysis prove this training is necessary. Successful implementation of this project moves PJ Enterprises much closer to achieving their ambitious business goals positioning him as the executive of a pivotal department in a rapidly growing company.	1:1 Meeting	Jane Mackenzie	Week of Monday, April 4, 2016
Telephone Operators	Resistance to change in workflow. Perception of "more work" in addition to regular responsibilities.	Successful implementation of the project will leave them and their colleagues better prepared to meet the demands of their jobs. Successful implementation of the project could result in a happier more satisfying work environment.	Email Introduction with FAQ Pre-shift meetings with CSSs Marketing (fun posters, teaser emails)	Developed by Project Coordinator; Jane MacKenzie sends it CSSs and Jane Project Coordinator	Week of Monday, June 13, 2016

Audience	Challenge	Message to address challenge	Channel	Responsible	Date
Customer Service Supervisors	Resistance to change in work flow Perception of "more work" in addition to regular responsibilities Concerned about the coverage on the floor and meeting current metrics	Successful implementation of the project will leave them and their colleagues better prepared to meet the demands of their jobs. Successful implementation of the project could result in a happier more satisfying work environment.	Email Introduction with FAQ Small group meeting or 1:1 Meeting	Developed by Project Coordinator; Jane Mackenzie sends it CSSs and Jane Project Coordinator	Week of Monday, May 23, 2016
Subject Matter Experts: Catalog Products	Time expected beyond normal responsibilities	Their contributions are vital to production; their level of engagement and support of the project goals can significantly impact the quality and timeliness of the project. Successful implementation of the project could result in a happier more satisfying work environment.	Small Group Meeting Kick off meeting	Jane and Amy Jane, Amy, Sarah, Tyler, Teresa, Bob	Week of Monday, April 4, 2016
SME: Customer Service	Time expected beyond normal responsibilities	Their contributions are vital to production; their level of engagement and support of the project goals can significantly impact the quality and timeliness of the project.	Small Group Meeting Kick off meeting	Jane and Amy Jane, Amy, Sarah, Tyler, Teresa, Bob	Week of Monday, April 4, 2016

Audience	Challenge	Message to address challenge	Channel	Responsible	Date
		Provide first-hand user experience information and feedback as to the realistic applicability of project deliverables.			
IT Department (Lucy Feldman)	Increased work load ensuring PDF resource is functioning within PJ's mainframe	This resource will allow TOs to better meet their metrics Initial workload on the front end but it is temporary once the document is uploaded. The success of the electronic product reference guide could highlight the importance of a well-functioning intranet and allow her to argue for additional resources to upgrade as necessary.	1:1 Meeting	Mike Merrill and Jane MacKenzie	Week of Monday, April 4, 2016

Risk Management Method

Throughout the life cycle of the project, START will follow this Risk Management Plan. This Plan encompasses a process of identifying, assessing, responding to, monitoring, and reporting risks. Risk management activities will be documented on the Risk Log (Appendix C). The Project Manager, working with the project team and project sponsor, will identify, prioritize and manage risks. The Risk Log will be maintained by the Project Manager and will be reviewed as a standing agenda item for project team meetings. The Project Manager will serve as the Risk Manager for this project.

Risks will be identified as early as possible in the project to minimize their impact. The probability of occurrence and impact of each identified risk will be assessed by the Project Manager, with input from the project team. Potential risks will be prioritized for a mitigation plan according to their potential impact. The Risk

Matrix Tool (below) will be used to determine which are top risks to respond to and which can be ignored. Careful attention will be given to the project deliverables, assumptions, constraints, WBS, and budget/time estimates. For each risk that will be mitigated, the project team will identify ways to prevent the risk from occurring or reduce its impact or probability of occurring.

Risks in the project will be actively monitored. Risks with the highest priority code are assigned to the Project Manager (Risk Manager). The Project Manager will provide status updates at project team meetings. Throughout the life of the project, risk monitoring will be continuous and will include the identification of trigger conditions (and re-assessment as needed) as well as thorough documentation. Project change requests will also be analyzed for their possible impact to the project risks.

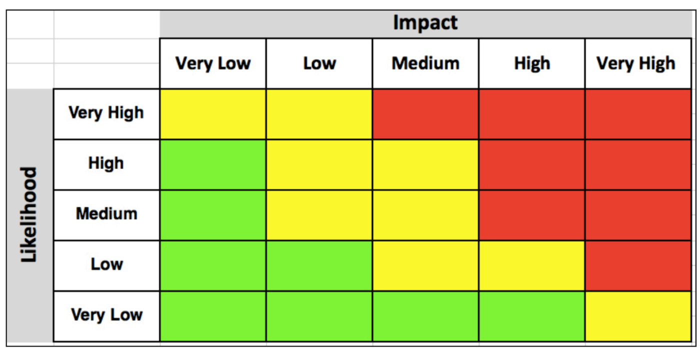
Risk Log

Each identified risk will be tracked with the following criteria on the Risk Log (Appendix C):

1. Risk Name - short descriptive title

2. Risk Priority - determined from Probability/Impact rankings from the Risk

   Matrix Tool:



Bonnie, E. (August 12, 2014). Project Risk Management Tools (Ultimate Guide to Project Risk, Part 2). Retrieved from https://www.wrike.com/blog/ultimate-guide-to-project-risk-part-2-risk-management/

   Risks that fall within the Red and Yellow zones will have risk response planning which may include both a mitigation and a contingency plan. Risks are given a priority ranking code:

   4 - Risk is escalated to Project Manager with mitigation strategies (Red)
   3 - Risk is monitored by Project Manager/Team (Red and Yellow)
   2 - Risk for Project Manager/Team to monitor, no escalation (Yellow)
   1 - Risk is tracked for awareness and monitor if it needs escalation (Green)

3. Risk Probability
   - Very High – above 90% likelihood of occurrence
   - High – 66-80% likelihood of occurrence
   - Medium – 40-65% likelihood of occurrence
   - Low – 20-39% likelihood of occurrence
   - Very Low - below 19% likelihood of occurrence

4. Risk Impact
    - Very High – Risk has potential to greatly impact project cost, schedule or deliverables
    - High – Risk has potential to impact project cost, schedule or deliverables
    - Medium – Risk has potential to slightly impact project cost, schedule or intermediate milestone, which could impact deliverables
    - Low– Risk that has relatively little impact on cost, schedule or deliverables and may impact intermediate milestone
    - Very Low – Risk has relatively little impact on cost, schedule or deliverables and is one that could easily be absorbed by the project

5. Root Cause - the origin that can be identified that might be controlled to potentially prevent or reduce the likelihood of the problem's occurrence.

6. Risk Response Strategy
    - Accept - the project plan is not changed because the risk impact is low
    - Exploit - the project plan is changed to take advantage of the unusual condition that has occurred
    - Enhance - the project plan is changed to take advantage of a new opportunity to achieve a project goal
    - Share - the project plan is changed so as to bring an outside partner onto the project to improve one of the project objectives
    - Transfer - the project plan is changed so that an outside party assumes responsibility for some of the risk impact
    - Mitigate - the project plan is changed so as to minimize risk impact because provisions for addressing it are in place

7. Risk Trigger - An event that results in the risk occurring

8. Current Status - The current status of the risk (Submitted, Team Reviewed, Analysis Requested, Analyzed, Mitigated, Monitored, Rejected, or Closed)

9. Date Logged

10. Risk Owner - Name of the person responsible for ensuring the risk response is performed (assigned by Project Manager)

11. Mitigation/Contingency Plan - strategies to prevent the risk from occurring or reduce its impact or probability of occurring

12. Notes - communications, changes, decisions, etc.

Appendix C - Risk Log

Project Plan Approvals

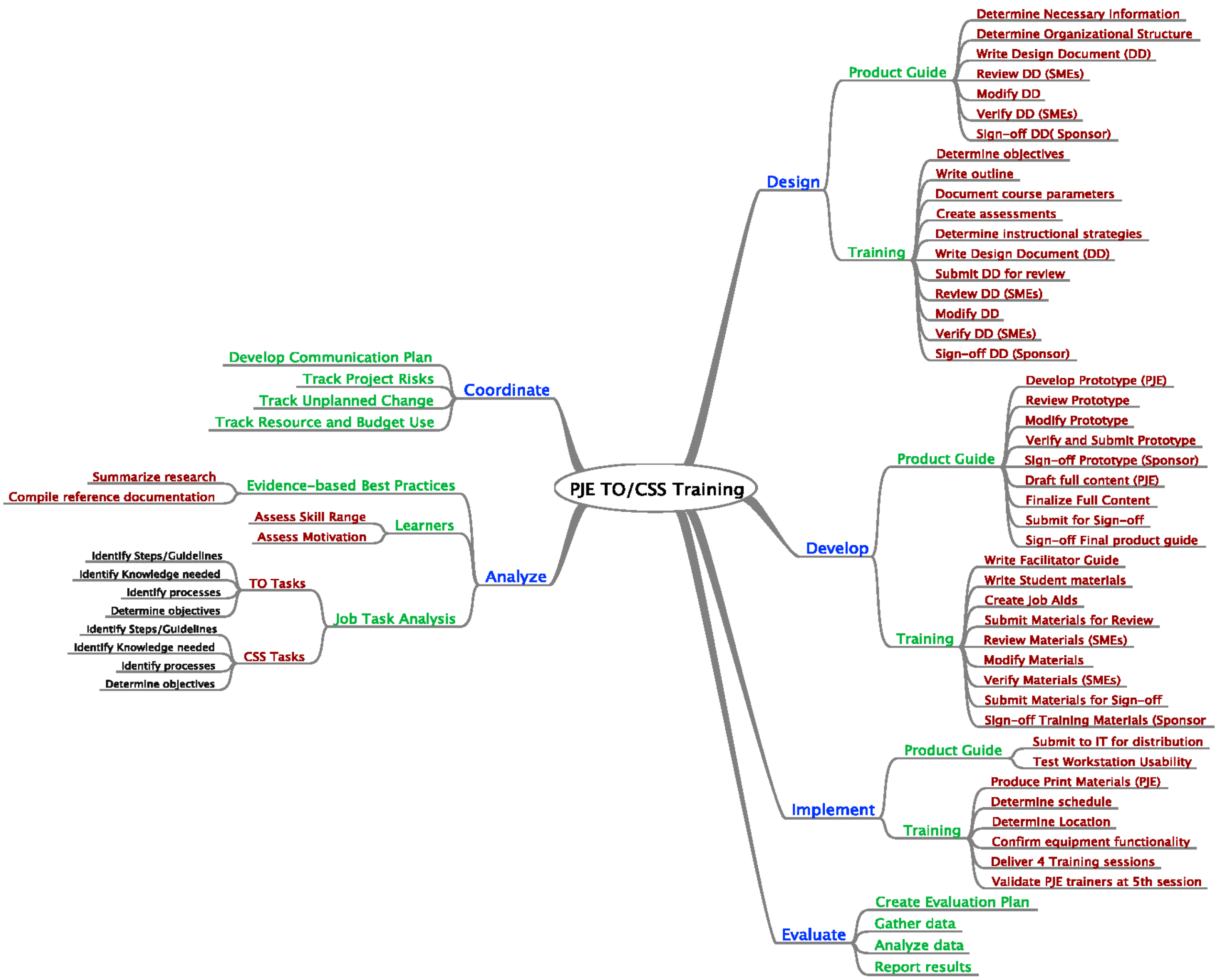
Approvals

Approved by:

Name	Role	Signature	Date
Jane MacKenzie-Smith	Project Sponsor		
Amy Law	Project Manager		

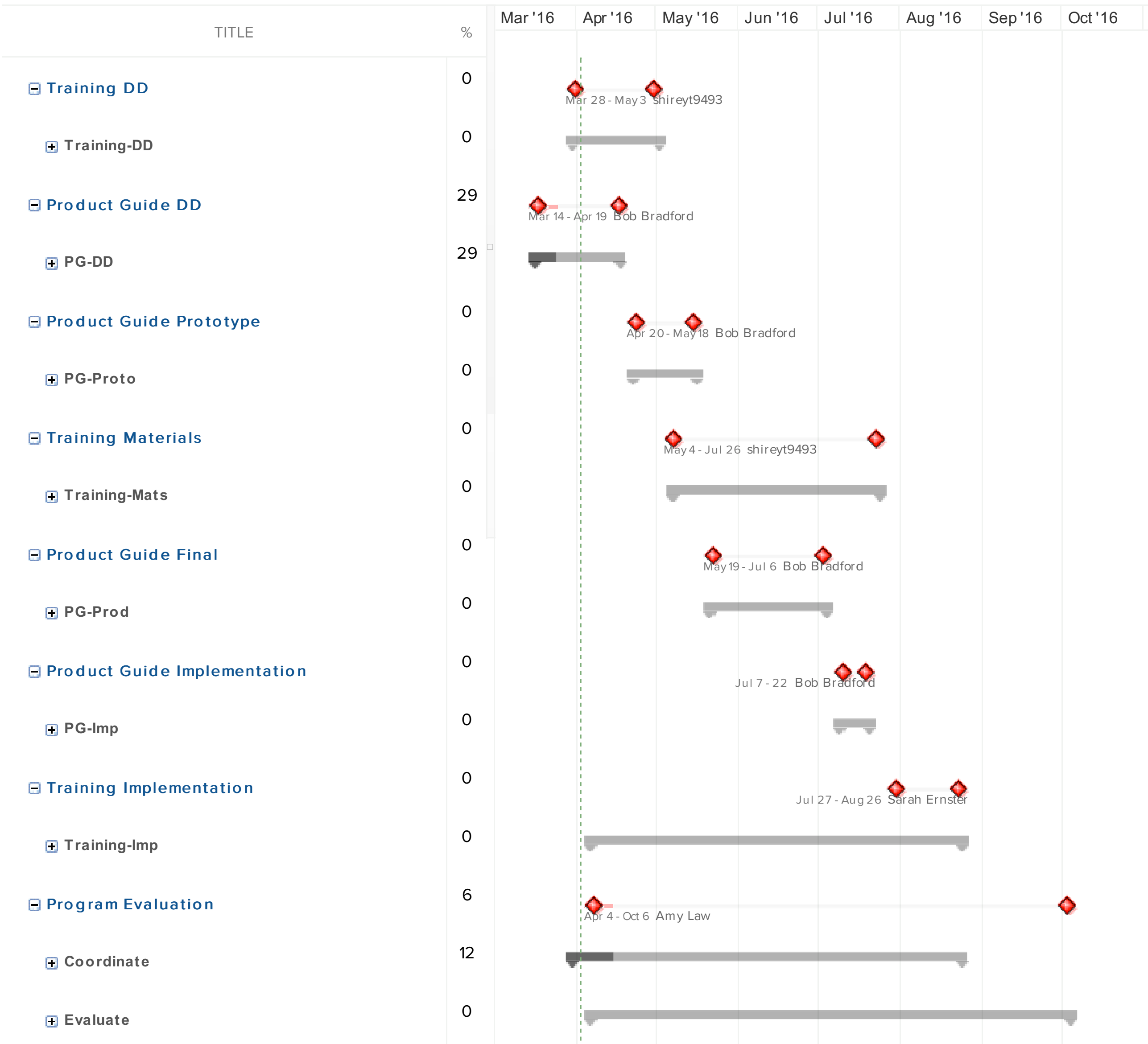
APPENDIX A

WBS Diagram:

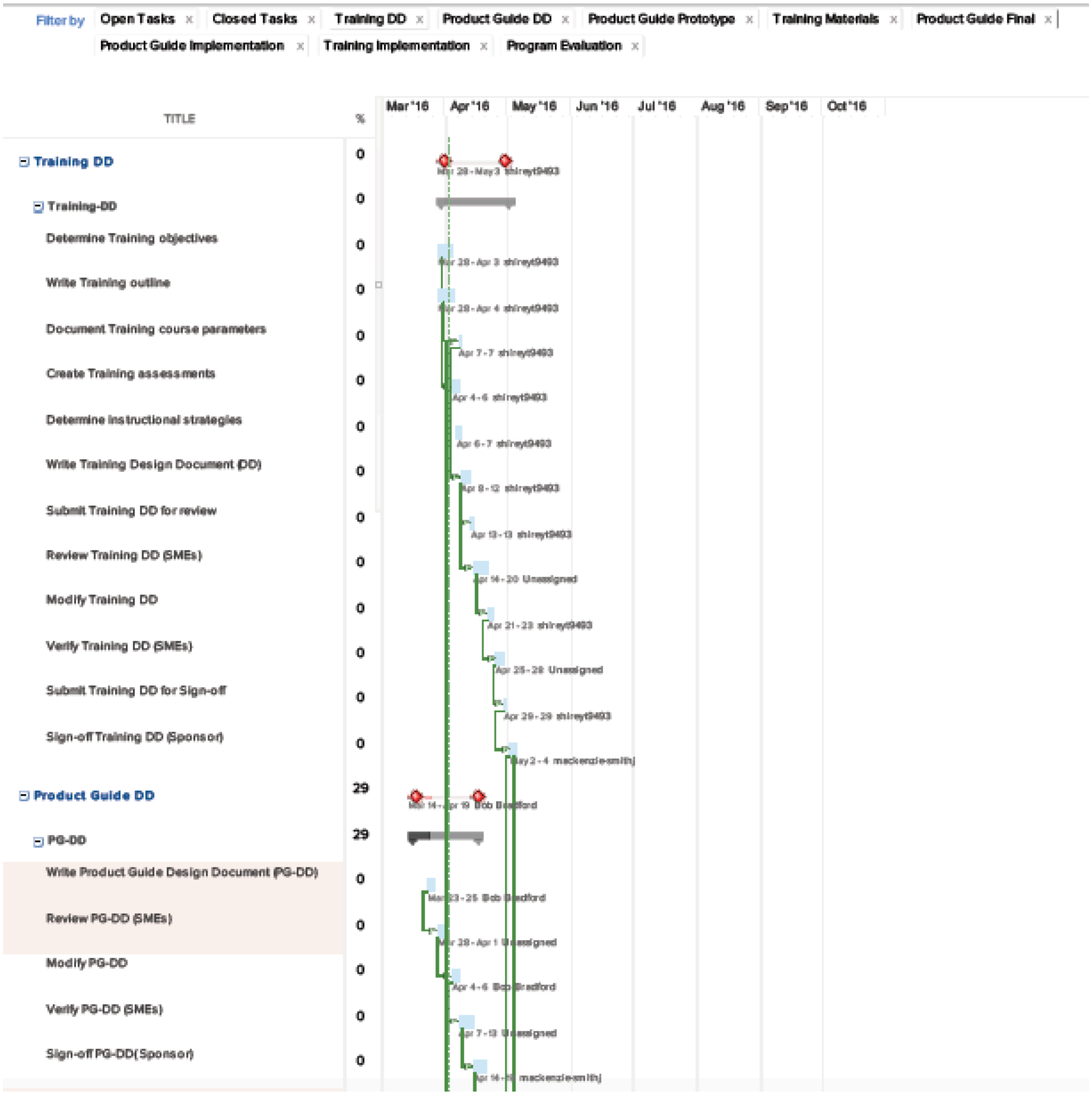


APPENDIX B

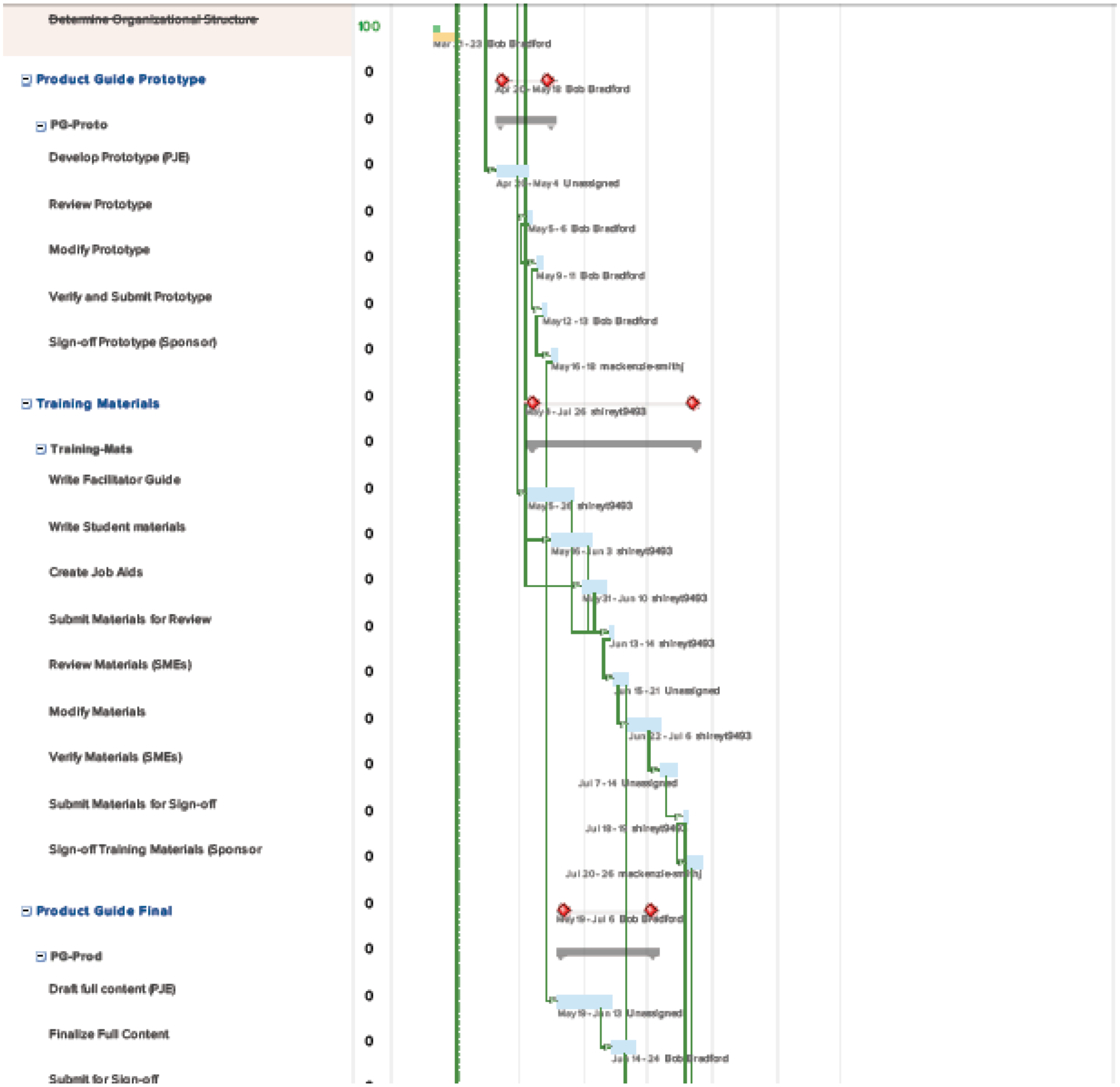
Project Gantt Chart (high level):



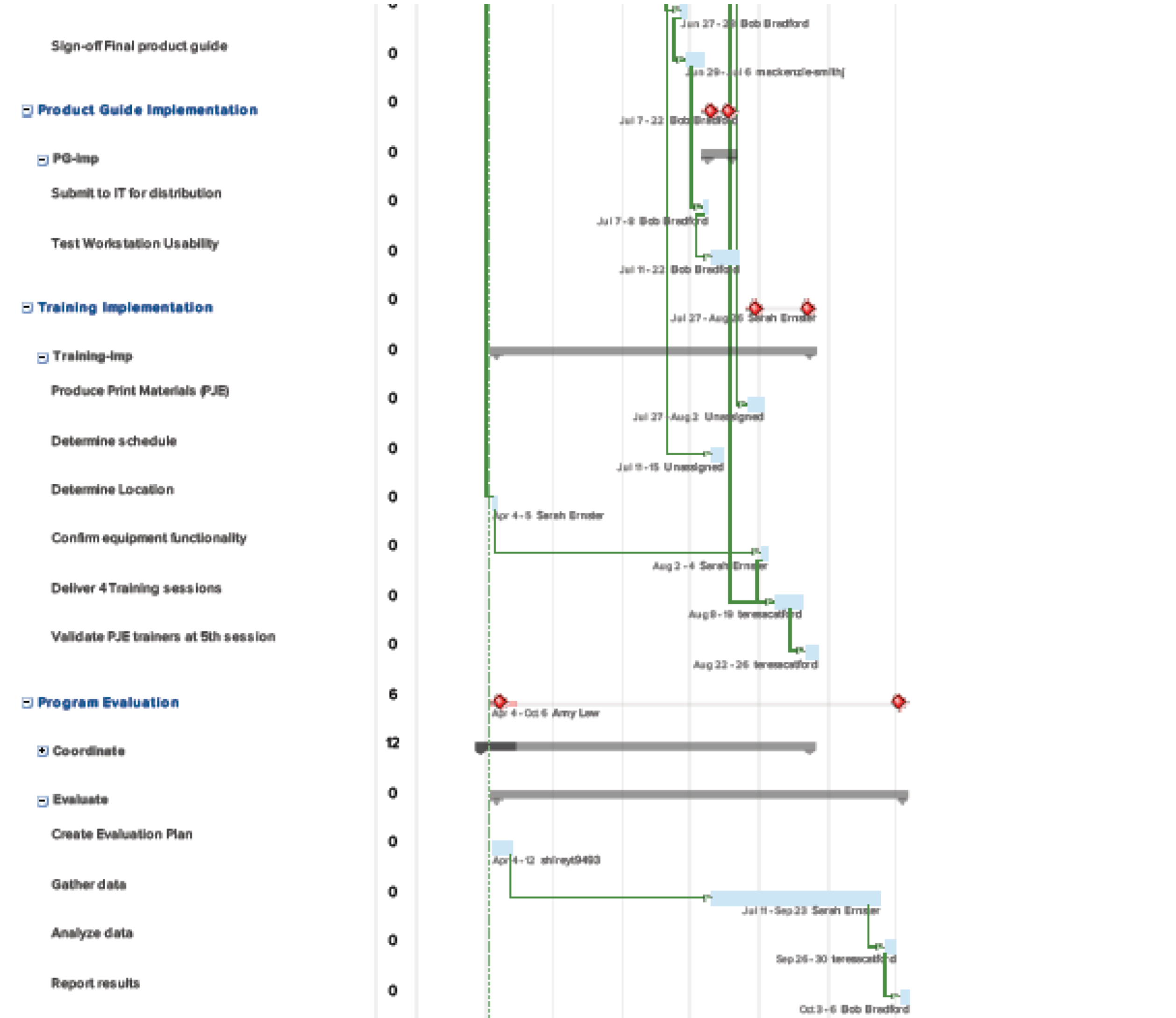
Project Gantt Chart Part 1 (critical path):



Project Gantt Chart Part 2 (critical path):



Project Gantt Chart Part 3 (critical path):



APPENDIX C

Risk Log

#	Risk	Priority	Probability	Impact Rating	Root Cause	Risk Response	Trigger	Current Status	Date Logged	Owner	Mitigation/Contingency Plan	Notes
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												
12												
13												
14												
15												
16												
17												
18												
19												
20												
21												
22												
23												
24												

APPENDIX D

Change Request and Register Form

Section 1: Change Request (completed by Submitter)		
Requestor Name: **Requestor Phone:**	**Date of Request:**	**Change Request Number:** *Supplied by (PM)*
Item to be Changed: *(Deliverable)*		**Priority:** *(High, Medium, Low)*
Description of Change:		
Estimated Cost & Time:		

Section 2: Change Register (completed by Project Manager)			
Evaluated by:		**Work Required:**	
What is Affect:			
Impact to Cost, Schedule, Scope, Quality, and Risk:			
Section 3: Change Resolution			
Accepted **Denied**	**Approved by (Print):**	**Signature:**	**Date:**
Comments:			
Section 4: Change Tracking			
Completion Date	**Completed by (Print):**	**Signature:**	**Date:**
My signature above indicates that the project documentation has been updated to accurately and comprehensively reflect the approved changes.			

APPENDIX E

Change Control Log

<table>
<tr><th colspan="8">Project Information</th></tr>
<tr><td colspan="5">Project Title:</td><td colspan="3">Project Number:</td></tr>
<tr><td colspan="8">Project Manager:</td></tr>
<tr><th>Change Number</th><th>Descripti on of Change</th><th>Priority</th><th>Date Requeste d</th><th>Requested By</th><th>Status (Open,
In Progress,
In Review,
Approved,
Closed)</th><th>Date Resolved</th><th>Resolut ion/Co mments</th></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr>
</table>