GoldMine Training

Mississippi College



**Project Team Members:**

Robert Gatewood – Project Manager

*Database Administrator*

Mark Hughes – Project Sponsor

*Dean of Enrollment Services*

Dr. Jim Turcotte – Project Owner

*Vice President of Enrollment Services and Dean of Students*

**6 December 2012**

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# Project Management Plan, p. 65

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Project Name:** | Mississippi College GoldMine Training | | | | |
| **Prepared by:** | Robert Gatewood, M.Ed. | | | | |
| **Date** | 6 December 2012 | | | | |
| **Version** | **Date** | | | **Comments** | |
| 1.0 | 18 October 2012 | | | Initial Project Proposal. | |
| 2.0 | 6 December 2012 | | | Revisions made and added supplemental materials. | |
| 1. **Summary** | | | | | |
| * **Purpose**  The Mississippi College Office of Enrollment Services has adopted FrontRange’s GoldMine application as its Customer Relations Management (CRM) tool. The purpose of GoldMine is to ensure better communication with perspective students and students who have applied to the university. By adopting GoldMine as the university’s CRM, admissions counselors will be able to better communicate with their perspective and applied students. GoldMine will also manage the office’s communication flow plan that dictates when a student receives an automated letter, email, postcard, or phone call. The admissions counselors will use the CRM to know when to place a phone call to a student and be able to record that phone call. GoldMine will also keep track of all information that a student has turned in thus far and information that needs to be turned in for a student’s file to be complete for admissions. GoldMine training is needed because the admissions staff has not been using the system to its fullest. The team was never properly trained after GoldMine was bought, so the staff does not know how to use the software effectively and only knows how to use limited functions of the software. * **Objectives**   + Deploy GoldMine to users’ computers.   + Implement GoldMine as the Office of Enrollment Services’ CRM.   + Properly train all necessary employees on how to use GoldMine effectively.      * **Overview** This project will include effectively training all necessary Enrollment Services employees on the proper use of GoldMine. The application will be available to them on their desktop computers in the office as well as on the web so that they can access information from off-campus. All features of GoldMine will be implemented within the first six months of its adoption at Mississippi College. All employees will be properly trained within the first year of Mississippi College adopting GoldMine as its CRM. All training will be conducted by the Database Administrator (DBA); no outside vendors will be involved in the training process unless an emergency arises. * [**Assumptions and constraints**](#projectscope)   + All employees will have a desktop PC in their office that is able to run GoldMine.   + Mississippi College has space on their Virtual servers for the GoldMine server.   + All employees will be willing to learn new processes that GoldMine will impose.   + The GoldMine system will work properly on the campus of Mississippi College.   + GoldMine is only able to be installed and work on a Windows based computer, it will not run on an Apple because of SQL Server.   + Some employees have done certain process for the same way for thirty years and may be unreceptive to change and using a new technology.   + It is assumed that Mississippi College has all the necessary equipment and will assist with any needed equipment.   + System failures/downtime.   + Bugs in the system.   + Intended budget is off. | | | | | |
| 1. **Project Plan-Documents Summary** | | | | | |
| *Subsidiary planning documents may only be updated after appropriate review and approval.*  [Project-scope statement](#projectscope)  [Project schedule-management plan](#_Project_Management_Plan,)  [Project quality-management plan](#quality)  [Project communications-management plan](#comm) | | | | | |
| 1. **Project Approval/Signatures** | | | | | |
| **Name** | | **Role** | **Signature** | | **Date** |
| Robert Gatewood | | Project Manager |  | |  |
| Mark Hughes | | Project Sponsor |  | |  |
| Dr. Jim Turcotte | | Project Owner |  | |  |

**Project Scope, p. 70**

|  |  |  |
| --- | --- | --- |
| **Project Name:** | Mississippi College GoldMine Training | |
| **Prepared by:** | Robert Gatewood, M.Ed. | |
| **Date** | 6 December 2012 | |
| 1. **Project Purpose (brief overview of the purpose and justification of the project.)** | | |
| The Mississippi College Office of Enrollment Services has adopted FrontRange’s GoldMine application as its Customer Relations Management (CRM) tool. The purpose of GoldMine is to ensure better communication with perspective students and students who have applied to the university. By adopting GoldMine as the university’s CRM, admissions counselors will be able to better communicate with their perspective and applied students. GoldMine will also manage the office’s communication flow plan that dictates when a student receives an automated letter, email, postcard, or phone call. The admissions counselors will use the CRM to know when to place a phone call to a student and be able to record that phone call. GoldMine will also keep track of all information that a student has turned in thus far and information that needs to be turned in for a student’s file to be complete for admissions. GoldMine training is needed because the admissions staff has not been using the system to its fullest. The team was never properly trained after GoldMine was bought, so they staff does not know how to use the software effectively and only knows how to use limited functions of the software. | | |
| 1. **Product Description** | | |
| GoldMine is a customer relations management (CRM) system that was developed by FrontRange. FrontRange is also the re-seller of GoldMine. This system helps keep customers, or in this case students, up-to-date with information in a communication flow plan. It also allows for the students to be contacted more frequently. | | |
| 1. **Business Objectives**  * Deploy GoldMine to users’ computers. * Implement GoldMine as the Office of Enrollment Services’ CRM. * Properly train all necessary employees on how to use GoldMine effectively. | | |
| 1. **Project Description (provide sufficient detail to properly refine the project)** | | |
| **Includes**   * GoldMine Application * Better communication with prospective and applied students. * Better communication with parents of prospective students, since they are the ones that will most likely be paying the bill.   **Does not include:**  This project will not include building a data bridge to the university’s student database, Banner. This project also does not include training or implementing GoldMine in any other office except for the Office of Enrollment Services.  **Project Completion Criteria:**  This project will only be considered a success when the following has been met:   * The GoldMine server on-campus has been set up. * The GoldMine application has been deployed to all necessary employees’ desktop computers. * All features of GoldMine have been implemented within the first six months. * All Enrollment Services employees have been properly trained within the first year. * Mississippi College executives have signed-off that the implementation and training of GoldMine have been completed. * Admissions staff has successfully begun using the GoldMine system to its full functionality.   **External Dependencies:**  There are very few external dependencies in this project because all of the training and implementation will be done in-house. The product should be delivered from FrontRange (GoldMine manufacturer) without any problem because they supply people with this software all the time without any problem. If GoldMine needs to be accessed off campus, we will have rely on the internet connection of the outside source.  **Assumptions:**   * All employees will have a desktop PC in their office that is able to run GoldMine. * Mississippi College has space on their Virtual servers for the GoldMine server. * All employees will be willing to learn new processes that GoldMine will impose. * The GoldMine system will work properly on the campus of Mississippi College.   **Constraints:**   * GoldMine is only able to be installed and work on a Windows based computer, it will not run on an Apple because of SQL Server. * Some employees have done certain process for the same way for thirty years and may be unreceptive to change and using a new technology. * It is assumed that Mississippi College has all the necessary equipment and will assist with any needed equipment. * System failures/downtime. * Bugs in the system. * Intended budget is off. | | |
| 1. **Project Milestones (define project milestones and target dates)** | | |
| **Project Milestones** | | **Target Date** |
| Implementation Plan | | 11/1/12 |
| Training Plan | | 12/1/12 |
| Communication Flow Plan | | 1/15/13 |
| Implementation Completion | | 5/1/13 |
| Training Completion | | 12/1/13 |
| 1. **Project Approach** This job will use the phased approach. There will be several phases that are done before training begins to meet with various people and see what needs have not been met with the system. There will be not outsourcing of jobs and no temporary hiring. | | |
| **Scheduled Status Reports:** There will be status reports that are generated each month to allow the Dean of Enrollment Services and the Vice President to measure how well the staff members are learning and effectively using the GoldMine system.  **Issues Management:**  Issues for this project will be handled on an as-needed basis. There should not be any major issues for this project, since all that is being done is training. There will be an Issues log kept for documentation of when/if the system goes down and other issues that might arise.  **Change Management:**  For changes that need to be made to the overall project, they will need to be submitted in writing to the Project Manager. The Change request will be logged in the Change Request Log and the Project Manager will decide if the change will be implemented into the project plan.  **Communication Management:**  Communication will be managed via email for this project. The project manager will send out the status of the project on a monthly basis. The project sponsor will be notified via email of any urgent issues.  **Procurement Management**  Goods and services will be obtained for this project by following proper university policies on purchasing materials and various items.  **Resource Management:**  The only resources that are needed for this project are the software that the staff is being trained on and computers for them to be trained on. The university already has the resources needed for training. | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Authorizations (signature indicate an understanding of the purpose and content of this document by those signing it and agree to this as the formal project-scope statement document)** | | | |
| **Name** | **Role** | **Signature** | **Date** |
| Robert Gatewood | Project Manager |  |  |
| Mark Hughes | Project Sponsor |  |  |
| Dr. Jim Turcotte | Project Owner |  |  |
| **Version History** | | | |
| **Version** | **Date** | **Comments** | |
| 1.0 | 18 October 2012 | Initial Project Proposal. | |
| 2.0 | 6 December 2012 | Revisions made and added supplemental materials. | |
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# Work Breakdown Structure and Activity Lists, p. 80

|  |
| --- |
| 1. Mississippi College GoldMine Training |
| * 1. Initiation |
| * + 1. Evaluation & Recommendations |
| * + 1. Develop Project Charter |
| * + 1. *Deliverable:* Submit Project Charter |
| * + 1. Project Sponsor Reviews Project Charter |
| * + 1. Project Charter Signed/Approved |
| * 1. Planning |
| * + 1. Create Preliminary Scope Statement |
| * + 1. Determine Project Team |
| * + 1. Project Team Kickoff Meeting |
| * + 1. Develop Project Plan |
| * + 1. Submit Project Plan |
| * + 1. *Milestone:* Project Plan Approval |
| * 1. Execution |
| * + 1. Project Kickoff Meeting |
| * + 1. Verify & Validate User Requirements |
| * + 1. Design System |
| * + 1. Procure Software |
| * + 1. Install Development System |
| * + 1. Testing Phase |
| * + 1. Install Live System |
| * + 1. User Training |
| * + 1. Go Live |
| * 1. Control |
| * + 1. Project Management |
| * + 1. Project Status Meetings |
| * + 1. Risk Management |
| * + 1. Update Project Management Plan |
| * 1. Closeout |
| * + 1. Audit Procurement |
| * + 1. Document Lessons Learned |
| * + 1. Update Files/Records |
| * + 1. Gain Formal Acceptance |
| * + 1. Archive Files/Documents |
|  |
|  |
|  |

[**Precedence Diagramming Method**](http://pmstudycircle.com/2012/07/precedence-diagramming-method-activity-on-node-method-scheduling/#axzz29bZgDX5t)**, p. 82**

Implementation Plan

No

All plans are complete and ready to move on.

Implementation Completion

Decision1- Can we move on?

Communication Flow Plan

Continue working on previous plans

Training Plan

Product installed and ready for training to begin.

Training Completion

# Activity Resource Requirement Including Duration Estimates, p. 91

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Task/ Activity #** | **Task/Activity Description** | **Type of Resources** | | **Estimated # of Resources** | **Estimated Duration** | |
|  |  | **Human Resources** | **Equipment** | **Days** | **Hrs.** |
| 1 | The Enrollment Services employees will successfully identify all the new features that the GoldMine software has to offer. This includes all the various screens and tabs. This will be conducted on their desktop computers. | * Computer Lab * Trainer | | 2 | 1 |  |
| 2 | The Enrollment Services employees will successfully create a new contact record in GoldMine by using their desktop computer. | * Computer Lab * Trainer | | 2 | 1 |  |
| 3 | The Enrollment Services employees will successfully record a call in GoldMine by using their desktop computer. | * Computer Lab * Trainer | | 2 | 1 |  |
| 4 | The Enrollment Services employees will successfully use the email component of GoldMine on their desktop computer. | * Computer Lab * Trainer | | 2 | 1 |  |
| 5 | The Enrollment Services employees will successfully use the GoldMine Web application to do the same functions that the native desktop GoldMine can do. | * Computer Lab * Trainer | | 2 | 1 |  |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | | **Baseline** | | **Actual** | |  | | |
| Task | Responsible | Duration Estimate of Days | Start | Finish | Start | Finish | # of Days Delay from Baseline | Reason for Delay | Action Steps |
| Implementation Plan | Mark Hughes | 30 | 11/1/12 | 12/1/12 | 11/1/12 | 12/1/12 | 0 |  |  |
| Training Plan | Robert Gatewood | 45 | 12/1/12 | 1/15/13 | 12/1/12 | 1/15/13 | 0 |  |  |
| Communication Flow Plan | Mark Hughes | 180 | 1/15/13 | 5/1/13 | 1/15/13 | In Progress |  |  |  |
| Implementation Completion | Robert Gatewood | 180 |  |  |  |  |  |  |  |
| Training Completion | Jim Turcotte |  |  |  |  |  |  |  |  |

**Project Schedule, p.95**

**Project Resource Plan, p. 100**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Project Name:** | | Mississippi College GoldMine Training | | | | |
| **Prepared By:** | | Robert Gatewood, M.Ed. | | | | |
| **Date:** | | 6 December 2012 | | | | |
| 1. Resource Profiles – For this project, we will need a computer lab on campus with approximately 15 computers with GoldMine installed, as well as the trainer. | | | | | | |
| People: Trainer | | | | | | |
| Equipment: Computers | | | | | | |
| Facilities: Compute Lab | | | | | | |
| Materials & Supplies: Paper and Pen/Pencil | | | | | | |
| Services: None | | | | | | |
| 2. Project Resource Information | | | | | | |
| **Resources** | **Cost Estimate** | | **Availability** | **Quantity** | **Output** | **Known Constraint** |
| Computers | $0.00 | | Whole Time | 15 |  | n/a |
| Computer Lab | $0.00 | | Whole Time | 1 |  | n/a |
| Trainer | $0.00 | | Whole Time | 1 |  | n/a |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 3. Resources Staffing Plan | | | | | | | | |
| **Type of People** | **Month** | **Month** | **Month** | **Month** | **Month** | **Month** | **Month** | **Month** |
| Trainer | November | December | January | Feb. | March | April | May | June |
| Project Manager | November | December | January | Feb. | March | April | May | June |
| Project Sponsor | November | December | January | Feb. | March | April | May | June |
| Project Owner | November | December | January | Feb. | March | April | May | June |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **4. Project Resources Plan Signatures:** | | | | |
| **Project Name:** | | Mississippi College GoldMine Training | | |
| **Project Manager:** | | Robert Gatewood, M.Ed. | | |
| I have reviewed the information contained in the project resource plan and agree | | | | |
| **Name** | **Role** | | **Signature** | **Date** |
| Robert Gatewood | Project Manager | |  |  |
| Mark Hughes | Project Sponsor | |  |  |
| Dr. Jim Turcotte | Project Owner | |  |  |

# Project Budget Form, pp. 104-105

|  |  |  |
| --- | --- | --- |
| Budget Item | Total Estimated Cost | Description |
| FrontRange GoldMine Application for 35 users | $75,000.00 | This cost will cover the cost of the GoldMine Application for 25 users. |
| GoldMine Web Application for 10 users | $5,000.00 | This cost will cover the cost of the GoldMine Web interface. |
| GoldMine Training of Trainers | $8,000.00 | Train the trainers that will train the staff at Mississippi College. |
| Unexpected Expenditures | $5,000.00 | This cost is for unexpected expenditures that might arise during the project. |
| **Total** | $93,000.00 | Total cost of the project. |

**Project Cumulative Cost Chart, pp.104-105**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Month of Project** | **Projected Monthly Cost** | **Projected Cumulative Cost** | **Actual Monthly Cost** | **Actual Cumulative Cost** |
| November | $88,000.00 | $88,000.00 | $88,000.00 | $88,000.00 |
| December | $0.00 | $88,000.00 | $88,000.00 | $88,000.00 |
| January | $0.00 | $88,000.00 | $88,000.00 | $88,000.00 |
| February | $0.00 | $88,000.00 | $88,000.00 | $88,000.00 |
| March | $0.00 | $88,000.00 | $88,000.00 | $88,000.00 |
| April | $0.00 | $88,000.00 | $88,000.00 | $88,000.00 |
| May | $1,000.00 | $89,000.00 | $89,000.00 | $89,000.00 |
| June | $0.00 | $89,000.00 | TBD | TBD |
| July | $1,000.00 | $90,000.00 | TBD | TBD |
| August | $1,000.00 | $91,000.00 | TBD | TBD |
| September | $1,000.00 | $92,000.00 | TBD | TBD |
| October | $0.00 | $92,000.00 | TBD | TBD |
| November | $1,000.00 | $93,3000.00 | TBD | TBD |
| December | $0.00 | $93,3000.00 | TBD | TBD |

**Project Quality Management Plan, p.109**

|  |  |
| --- | --- |
| **Project Name:** | Mississippi College GoldMine Training |
| **Prepared By:** | Robert Gatewood, M.Ed. |
| **Date:** | 6 December 2012 |
| **1. Organization's Quality Policy** | |
| Mississippi College seeks to be known as a university that has a high quality of learning and student outcome. Therefore, the quality of the project will be held to the same standard as that of the university. | |

# Human Resources Plan, p. 113

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Project Name** | Mississippi College GoldMine Training | | | | |
| **Project Manager** | Robert Gatewood, M.Ed. | | | | |
| **Stakeholders/ Project Team Members** | | | | | |
| **Project Tasks/Activities** | | ***Person Name*** | ***Person Name*** | ***Person Name*** | ***Person Name*** |
|  | | *Role:* | *Role:* | *Role:* | *Role:* |
| Implementation Plan | | Mark Hughes – Project Sponsor |  |  |  |
| Training Plan | | Robert Gatewood – Project Manager |  |  |  |
| Communication Flow Plan | | Mark Hughes – Project Sponsor |  |  |  |
| Implementation Completion | | Robert Gatewood – Project Manager |  |  |  |
| Training Completion | | Jim Turcotte – Project Owner |  |  |  |

**Project Communication Plan, p. 116**

|  |  |
| --- | --- |
| **Project Name:** | Mississippi College GoldMine Training |
| **Prepared by:** | Robert Gatewood, M.Ed. |
| **Date:** | 6 December 2012 |
| 1. **Project Purpose** | |
| The Mississippi College Office of Enrollment Services has adopted FrontRange’s GoldMine application as its Customer Relations Management (CRM) tool. The purpose of GoldMine is to ensure better communication with perspective students and students who have applied to the university. By adopting GoldMine as the university’s CRM, admissions counselors will be able to better communicate with their perspective and applied students. GoldMine will also manage the office’s communication flow plan that dictates when a student receives an automated letter, email, postcard, or phone call. The admissions counselors will use the CRM to know when to place a phone call to a student and be able to record that phone call. GoldMine will also keep track of all information that a student has turned in thus far and information that needs to be turned in for a student’s file to be complete for admissions. GoldMine training is needed because the admissions staff has not been using the system to its fullest. The team was never properly trained after GoldMine was bought, so they staff does not know how to use the software effectively and only knows how to use limited functions of the software. | |
| **2. Business Need** | |
| This project will include effectively training all necessary Enrollment Services employees on the proper use of GoldMine. The application will be available to them on their desktop computers in the office as well as on the web so that they can access information from off-campus. All features of GoldMine will be implemented within the first six months of its adoption at Mississippi College. All employees will be properly trained within the first year of Mississippi College adopting GoldMine as its CRM. All training will be conducted by the Database Administrator (DBA); no outside vendors will be involved in the training process unless an emergency arises. | |
| **3. Communication Principals** | |
| Include principles to ensure consistency in messages and tone in your communication.  Communication will be:   * Straightforward and hones in keeping with Mississippi College’s values and standards for two-way communication, * Consistent to all stakeholder groups and/or audiences, * Written from the perspective an voice of the intended stakeholder and/or audience using a conversational tone, * Promoted as a means to increase acceptance, * Concise, direct, and produced in a manner that is easily understood so as to be mindful of the time constraints of the audience, and * Timely and cost-effective to reflect user preference. | |
| **4. Communication Objectives** | |
| * Promote and explain the benefits of the initiative. * Gain support and cooperation for the initiative informing stakeholders how and where they fit into the process. * Promote two-way discussion and face-face communication as a means of increasing acceptance and sustaining change. | |

**Project Risk-Management Plan, p. 122**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Name:** | Mississippi College GoldMine Training | | | | | | | |
| **Prepared by:** | Robert Gatewood, M.Ed. | | | | | | | |
| **Date:** |  | | | | | | | |
| 1. **Risk Identification** | | | | | | | | |
| * GoldMine Server Crashes * Loss of team member * Need for an outside consultant * Motivation of Staff * Over/Under Budget | | | | | | | | |
| **2. Risk Categorization** | | | | | | | | |
| * Equipment   + GoldMine Server Crashes * Personnel   + Loss of team member   + Motivation of Staff * Other   + Need for an outside consultant   + Over/Under Budget | | | | | | | | |
| **3. Risk Probability and Impact Assessment** | | | | | | | | |
| |  |  |  |  | | --- | --- | --- | --- | | **Risk** | **High** | **Medium** | **Low** | | GoldMine Server Crashes | Computers sometimes crash and if the GoldMine server were to crash we would have to implement a new server and could extend the project time line. |  |  | | Loss of team member |  |  | The loss of a team member could require the extension of project time. | | Need for an outside consultant |  | If the DBA runs into any problems that require an outside consultant to be hired. |  | | Motivation of Staff |  |  | The staff will need to be motivated and convinced that this is the way the office needs to run. | | Over/Under Budget | It will be a major issue with the CFO if we go over budget. |  | It will not be a problem if we go under budget. | | | | | | | | | |
| **4. Risk Prioritization** | | | | | | | | |
| * GoldMine Server Crashes * Loss of team member * Need for an outside consultant * Motivation of Staff   Over/Under Budget | | | | | | | | |
| **5. Risk-Response Planning** (identify a plan for each risk in the risk register that is above the risk threshold.) | | | | | | | | |
| * GoldMine Server Crashes   + Replace Server and get system back up and running. * Loss of team member   + Distribute lost team members duties until someone is hired.   + Begin looking for a replacement for the lost team member. * Need for an outside consultant   + Hire an outside consultant as soon as possible if needed, to keep project on track. * Motivation of Staff   + Make sure staff is motivated to work and work hard. Find ways to motivate staff if needed. * Over/Under Budget   + If over budget, try to cut costs for the remainder of the project to stay at or under budget.   + If under budget, continue on with project. | | | | | | | | |
| **6. Risk Management Strategy** | | | | | | | | |
| No actions need to be taken because no risks have come up. | | | | | | | | |
| **7. Risk Monitoring** | | | | | | | | |
| Ensure that all requirements of the risk-management plan are being implemented  Assess currently defined risks as defined in the risk register  Evaluate effectiveness of actions taken  Validate previous risk assessment (likelihood and impact)  Validate previous assumptions  State new assumptions  Identify new risks  Track risk response  Establish communications | | | | | | | | |
| **8. Risk control** | | | | | | | | |
| Validate mitigation strategies and alternatives  Take corrective action when actual events occur  Assess impact on the project of actions taken (cost, time, resources)  Identify new risks resulting from risk mitigation actions  Ensure that the project plan (including the risk-management plan) is maintained  Ensure change control addresses risks associated with the proposed change  Revise risk register | | | | | | | | |
| **9. Risk Define Assumptions That Have a Significant Impact on Project Risk** | | | | | | | | |
| None as of now. | | | | | | | | |
| **10. Define the roles and Responsibilities Unique to the Risk Management Function** | | | | | | | | |
| **Risk Response Tracking Coordinator** | | | **Risk Management Team Member** | | **Risk Management Team Member** | | | **Risk Management Team Member** |
| Robert Gatewood | | | Mark Hughes | | Jim Turcotte | | |  |
|  | | |  | |  | | |  |
| **11. Define Risk Management Milestones** | | | | | | | | |
| **Milestone** | | | | | | **Date** | | |
| Risk-management plan approved | | | | | |  | | |
| Risk assessment questionnaire tailored to the project | | | | | |  | | |
| Risk assessment questionnaire and project planning risk evaluation checklist complete | | | | | |  | | |
| Risk Management Reviews scheduled | | | | | |  | | |
|  | | | | | |  | | |
| **12. Define Risk Rating Scoring Technique** | | | | | | | | |
| Default rating/scoring system is as follows:  Impact score may be rated as 1, 3, 5, 7, 9(1=very low, 9=very high)  Probability may be rated as 0, 1, 0.3,0.5, 0.7, 0.9 (0.1=very low, 0.9= very high) | | | | | | | | |
| **13. Establish the Risk Thresholds** | | | | | | | | |
| Risk priority is determined by calculating the risk score (=impact\*Probability) and then comparing that risk score to priority thresholds. Based on the scoring system, the lowest possible risk score is 1\*0.1=.01 and the highest possible risk score is 9\*9.09=8.1  The following priority thresholds will be used to establish risk priority  Green (low risk)<=2.5  Yellow (medium risk) between 2.5 and 6.5  Red (high risk) >=6.5  *High Risk*  The project team develops a full response plan for each item rated as high risk. These risks are watched closely.  *Medium Risk*  The project team should create a response plan for any medium-risk item where they deem it necessary. However, in general, no response plan is required for medium risk items. Medium risks are monitored on a regular basis.  *Low Risk*  No action is required for low-risk items except to keep a watch on them as project progresses. All risk items with a response plan are to be entered into the risk register document. | | | | | | | | |
| **14. Define Risk communications** | | | | | | | | |
| Communications will be sent out to the team when something happens. | | | | | | | | |
| **15. Define Risk Tracking Process** | | | | | | | | |
| We will track all risk communications and risk issues in the Risk Log. | | | | | | | | |
| **16. Project Risk Management Plan Signatures** | | | | | | | | |
| I have reviewed the information contained in the project risk- management plan and agree. | | | | | | | | |
|  | | | | | | | | |
| **Name** | | **Role** | | **Signature** | | | **Date** | |
| Robert Gatewood | | Project Manager | |  | | |  | |
| Mark Hughes | | Project Sponsor | |  | | |  | |
| Jim Turcotte | | Project Owner | |  | | |  | |
|  | |  | |  | | |  | |

**Risk-Response Planning, pp. 138-139**

**Mississippi College GoldMine Training**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Risk Identification | | Qualitative Rating | | | | Risk Response | | |
| Risk | Risk Category | Probability | Impact | Risk Score | Risk Ranking | Risk Response | Trigger | Risk Owner |
| GoldMine Server Crashes | Equipment | 0.5 | 9 | 4.5 | 2 | Fix the server | Server is down | Robert Gatewood |
| Loss of a team member | Personnel | 0.1 | 9 | 0.9 | 3 | Distribute responsibilities and hire new person | Someone leaves | Robert Gatewood |
| Need for an outside consultant | Other | 0.1 | 3 | 0.3 | 5 | Hire consultant | In-house consultant is unavailable | Robert Gatewood |
| Motivation of Staff | Personnel | 0.4 | 1 | 0.4 | 4 | Motivate Staff | Staff Morale is low | Mark Hughes |
| Over/Under Budget | Other | 0.8 | 9 | 7.2 | 1 | Fix the budget | Monthly accounting reports show a problem | Jim Turcotte |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ***Key Terms*** |  |  |  |  |  |
| **Risk:** The risk stated in a complete sentence which states the cause of the risk, the risk, and the effect that the risk causes to the project. | | | | | |
| **Risk Category:** Categorization of risks by area of project affected, source of risk or other useful category. | | | | | |
| **Probability:** The likelihood that a risk or opportunity will occur (on a scale from 0 to 10 with 10 being the highest). | | | | | |
| **Impact:**  The impact of the risk on the project if the risk occurs (scale from 0 to 10 with 10 being the highest). | | | | | |
| **Risk Score:**  Determined by multiplying probability and impact (scale from 0 to 100). | | | | | |
| **Risk Ranking:**  A priority list which is determined by the relative ranking of the risks (by their scores) within the project with the number one being the highest risk score. | | | | | |
| **Risk Response:**  The action which is to be taken if this risk occurs. | | | | | |
| **Trigger:** Something which indicates that a risk is about to occur or has already occurred. | | | | | |
| **Risk Owner:** The person who the project manager assigns to watch for triggers, and manage the risk response if the risk occurs. | | | |  |  |
| This Risk Register Template is brought to you by **www.projectmanagementdocs.com** | |  |  |  |  |

**Procurement Plan, p. 145**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Project Name: | Mississippi College GoldMine Training | | | | | |
| Prepared by: | Robert Gatewood, M.Ed. | | | | | |
| Date: | 6 December 2012 | | | | | |
| 1. **Procurement Statement** (describe in general terms what products or services are being considered for procurement) | | | | | | |
| Mississippi College will be buying GoldMine from FrontRange as its Customer Relations Management System. | | | | | | |
| **2. Estimated Cost** | | | | | | |
| GoldMine Desktop -$75,000.00  GoldMine Mobile - $5,000.00 | | | | | | |
| **3. Vendor Selection** | | | | | | |
| The team has already decided that FrontRange will be the vendor. | | | | | | |
| **4. Procurement Definition** | | | | | | |
| The GoldMine software will be procured. This will include yearly maintenance. | | | | | | |
| **5. Selection Process and Criteria** | | | | | | |
| When Mississippi College’s current CRMS, Banner was not doing what the Admissions office wanted, they picked a new software from FrontRange | | | | | | |
| **6. Procurement Team** | | | | | | |
| List all stakeholders who are involved in the procurement process along with contact information and description of procurement role | | | | | | |
| **Name** | | | **Phone/e-mail** | | **Procurement Role** | |
| Robert Gatewood | | | [Gatewood@mc.edu](mailto:Gatewood@mc.edu) | | Project Manager | |
| Mark Hughes | | | [rmhughes@mc.edu](mailto:rmhughes@mc.edu) | | Project Sponsor | |
| Jim Turcotte | | | [turcotte@mc.edu](mailto:turcotte@mc.edu) | | Project Owner | |
|  | | |  | |  | |
| **7. Contract Type** | | | | | | |
| No contracts will be signed in this project. | | | | | | |
| **8. Contract Standards** | | | | | | |
| N/A | | | | | | |
| **9. Vendor Management** | | | | | | |
| The vendor will be responsible for delivering the software. Once it has been delivered, their job is done. | | | | | | |
| **10.Project Procurement Plan Signatures** | | | | | | |
| I have reviewed the information contained in the project procurement plan and agree. | | | | | | |
| **Name** | | **Role** | | **Signature** | | **Date** |
| Robert Gatewood | | Project Manager | |  | |  |
| Mark Hughes | | Project Sponsor | |  | |  |
| Jim Turcotte | | Project Owner | |  | |  |

# Change Management Plan, p. 175

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Project Name: | Mississippi College GoldMine Training | | | |
| Prepared by: | Robert Gatewood, M.Ed. | | | |
| Date: | 6 December 2012 | | | |
| 1. **Purpose** | | | | |
| Ensure that all changes to the project are reviewed and approved in advance  All changes are coordinated across the entire project  All stakeholders are notified of approved changes to the project | | | | |
| 1. **Goals** | | | | |
| Consider all requests for change  Define, evaluate, approve, and track changes through to completion  Modify project plans to reflect the impact of the requested changes  Bring the appropriate parties into the discussion  Negotiate changes and communicate them to all affected parties | | | | |
| 1. **Responsibilities** | | | | |
| **Those Responsible for Change Management** | **Responsibilities** | | | |
| Project manager and project team | Developing the change management plan | | | |
| Project Manager | Facilitating or executing the change management process. This process may result in changes to the scope, schedule, budget, and/or quality plans. Additional resources may be needed. | | | |
| Designated member of the project team | Maintain a log of all change requests | | | |
| Project manager | Conducting reviews of all change management activities with senior management on a periodic basis | | | |
| The executive committee | Ensuring that the change management plan is implemented and that adequate resources and funding are available to support execution of the change management plan. | | | |
| 1. **Process** (the change management process may be simple or complex. The text below is provided as an example of how requests for change may be handled on your project) | | | | |
| Any stakeholder may request or identify a change. He/she uses a change request form to document the nature of the change request. The change request is submitted in writing. | | | | |
| The completed form is sent to a designated member of the project team who enters the change request into the project change request log.  The change requests are reviewed daily by the project manager or designee. The outcome of the decision may be to reject, defer to another date, accept for analysis or immediately (in cases of emergency),  If approved, perform analysis and develop a recommendation  Accept or reject the recommendation  If accepted, update project documents revise plans  Notify all stakeholders of the change | | | | |
| 1. **Notes on the Change-control process** | | | | |
| A change request is included in the project only when both the sponsor and the project team agree on a recommended action  The change request may be:  Low impact—No material affect on cost or schedule. Quality is not impaired.  Medium impact—Moderate impact on cost or schedule, or no impact on cost and schedule but quality is impaired. If the impact is negative, the sponsor may review and approval is required.  High impact—Significant impact on cost, schedule or quality. If impact is negative, executive committee review and approval is required.  Whenever changes are made to project documents, the version history is updated in the document and prior versions are maintained in an archive. Edit access to project documents is limited to the project manager and designated individuals on the project team. | | | | |
| 1. **Change Management Plan Signatures** | | | | |
| I have reviewed the information contained in the change management plan and agree. | | | | |
| **Name** | | **Role** | **Signature** | **Date** |
| Robert Gatewood | | Project Manger |  |  |
| Mark Hughes | | Project Sponsor |  |  |
| Jim Turcotte | | Project Owner |  |  |
|  | |  |  |  |

**Meeting Minutes Template, p.180**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Meeting Name: | | | Project Timeline Meeting | | | | | | | | |
| Date of Meeting:  (MM/DD/YYYY) | | | 10/04/12 | | | | Time: | | 9:00 a.m. | | |
| Minutes Prepared By: | | | Robert Gatewood | | | | Location: | | Admissions Media Room | | |
| 1. Meeting Objective: | | | | | | | | | | | |
| * Plan project timeline | | | | | | | | | | | |
| 2. Attendance at Meeting | | | | | | | | | | | |
| Name | | Department | | | E-mail | | | | | Phone | |
| Robert Gatewood | | Admissions | | | [Gatewood@mc.edu](mailto:Gatewood@mc.edu) | | | | | 601.925.3286 | |
| Mark Hughes | | Admissions | | | [rmhughes@mc.edu](mailto:rmhughes@mc.edu) | | | | | 601.925.7734 | |
| Jim Turcotte | | Student Affairs | | | [turcotte@mc.edu](mailto:turcotte@mc.edu) | | | | | 601.925.3809 | |
|  | |  | | |  | | | | |  | |
| 3. Agenda, Notes, Decisions and Issues | | | | | | | | | | | |
| Topic | | | | | | | | Owner | | | Time |
| Project Timeline | | | | | | | | Robert Gatewood | | | 9:00 a.m. |
| 4. Action Items | | | | | | | | | | | |
| Action | | | | | | | | Owner | | | Due Date |
| Implementation Plan | | | | | | | | Mark Hughes | | | 12/1/12 |
| Training Plan | | | | | | | | Robert Gatewood | | | 1/15/13 |
| Communication Plan | | | | | | | | Mark Hughes | | | 5/1/13 |
|  | | | | | | | |  | | |  |
| 5.Decisions Made | | | | | | | | | | | |
| Decision 1: | Decided project timeline | | | | | | | | | | |
| Decision 2: |  | | | | | | | | | | |
| Decision 3: |  | | | | | | | | | | |
| Decision 4: |  | | | | | | | | | | |
| 6.Next Meeting | | | | | | | | | | | |
| Date:  (MM/DD/YYYY) | | 12/1/12 | | Time: | | 9:00 a.m. | | | Location: | | Admissions |

# Project Issue Template, p. 182

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Project Name: | | | Mississippi College GoldMine Training | | | |
| Prepared by: | | | Robert Gatewood, M.Ed. | | | |
| Date: | | | 6 December 2012 | | | |
| 1. **Issue Background** (Fill in with appropriate information or place an “X” next to those that apply.) | | | | | | |
| Issue Type:  Request for Information [ ] Procedural Problem [ ] System Problem [ ] Other [ X ] | | | | | | |
| Issue Description:  Staff Morale is low and work performance could be better. | | | | | | |
| Potential Impact (if not resolved):  Project Timeline is off because projects were not completed ontime.  Attachments (if any)  Yes [ ] No [ X ]  Date Resolution Needed: 1/1/13 | | | | | | |
| 1. **Analysis** | | | | | | |
| Reviewer Name:  Robert Gatewood  Review Completion Date:  12/15/13  Reviewer Comments:  N/A  Initial Recommendation:  Offer incentives to increase staff morale and production.  Cost/Schedule Impact Analysis Required? Yes [ ] No [ X]  Proposed Assignee: | | | | | | |
| Estimate of Additional Effort: (insert rows as needed) | | | | | | |
| Resources Required | | | | Work Days/Costs | | |
| None | | | |  | | |
| 1. **Recommendation** (final recommendation and comments) | | | | | | |
| Name | | Title | | Signature | | Date |
| Robert Gatewood | | Project Manager | |  | |  |
|  | |  | |  | |  |
|  | |  | |  | |  |
|  | |  | |  | |  |
| 1. **Management Action** | | | | | | |
| Recommendation Status: Fill in with appropriate information or place an X next to those that apply  Accept [ X] Defer [ ] Reject [ ] Need Additional Information [ ]  Assigned to:  Robert Gatewood  Planned Completion Date: 1/15/13 | | | | | | |
| Name | Title | | Date | | Comment | |
|  |  | |  | |  | |
|  |  | |  | |  | |
|  |  | |  | |  | |
|  |  | |  | |  | |
| 1. **Project Issue Document Signatures** | | | | | | |
| I have reviewed the information contained in the project issue document and agree | | | | | | |
| Name | Role | | Signature | | Date | |
| Robert Gatewood | Project Manager | |  | |  | |
| Mark Hughes | Project Sponsor | |  | |  | |
| Jim Turcotte | Project Owner | |  | |  | |
|  |  | |  | |  | |

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal project issue document.

# Project Monthly Status Report, p. 185

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Name:** | | | | | | | | Mississippi College GoldMine Training | | | | | | | |
| **Prepared by:** | | | | | | | | Robert Gatewood, M.Ed. | | | | | | | |
| **Date:** | | | | | | | | 6 December 2012 | | | | | | | |
| 1. **Executive Summary** | | | | | | | |  | | | | | | | |
| Overall Status: On Task and On Time | | | | | | | | | | | | | | | |
|  | | 1. **Green**   **(Controlled)** | | | 1. **Yellow**   **(Caution)** | | | | | | 1. **Red**   **(Critical)** | | | **Reason for Deviation** | |
| Budget: | | **X** | | |  | | | | | |  | | |  | |
| Schedule: | | **X** | | |  | | | | | |  | | |  | |
| Scope: | | **X** | | |  | | | | | |  | | |  | |
| Quality | | **X** | | |  | | | | | |  | | |  | |
| 1 = Project is within budget, scope and on schedule  2 = Project has deviated slightly from the plan but should recover  3 = Project has fallen significantly behind schedule, is forecasted to be significantly over budget, and/or has taken on tasks that are out of scope. | | | | | | | | | | | | | | | |
| Comments  All is going according to plan and budget. | | | | | | | | | | | | | | | |
| 1. **Controls** | | | | | | | | | | | | | | | |
| **Issue Status** (issues requiring resolution by project team or executive committee)  **Change Status** (changes raised for consideration that changes the approved project baselines. Would require approval by the project sponsor and possibly the executive committee)  **Risk Status** (report on any changes in priority or status of major project risks, and any risks discovered since earlier risk assessments along with proposed risk response) | | | | | | | | | | | | | | | |
| 1. **Budget Report** | | | | | | | | | | | | | | | |
| **Expense** | **Budget to Date** | | **Actual to Date** | | | | **Variance** | | | **Estimate to Complete** | | | **Budget Total Cost** | | **Estimate at Completion** |
| GoldMine | $80,000.00 | | $80,000.00 | | | | $0.00 | | |  | | |  | |  |
| GoldMine Mobile | $80,000.00 | | $80,000.00 | | | | $0.00 | | |  | | |  | |  |
|  |  | |  | | | |  | | |  | | |  | |  |
|  |  | |  | | | |  | | |  | | |  | |  |
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|  |  | |  | | | |  | | |  | | |  | |  |
| **Comments** | | | | | | | | | | | | | | | |
| 1. **Scheduled Milestones/Deliverables** | | | | | | | | | | | | | | | |
| List any project milestones that are late as well as milestones due in the next 4-6 weeks. | | | | | | | | | | | | | | | |
| Milestone | | | | | | Approved Schedule | | | Actual | | | Current  Forecast | | | Status |
| Implementation Plan | | | | | | 12/1/12 | | | 12/1/12 | | |  | | | Complete |
| Training Plan | | | | | | 1/15/13 | | |  | | |  | | | In Progress |
|  | | | | | |  | | |  | | |  | | |  |
|  | | | | | |  | | |  | | |  | | |  |
|  | | | | | |  | | |  | | |  | | |  |
|  | | | | | |  | | |  | | |  | | |  |
| 1. **Accomplishments/Plans** | | | | | | | | | | | | | | | |
| Accomplishments during this reporting period (should relate to milestones)  Just planning during this period, nothing due until the new year. | | | | | | | | | | | | | | | |
| Plans during the next reporting period (should relate to milestones) | | | | | | | | | | | | | | | |
| 1. **Monthly Status Report Signatures** | | | | | | | | | | | | | | | |
| I have reviewed the information contained in the monthly status report and agree | | | | | | | | | | | | | | | |
| **Name** | | | | **Role** | | | | **Signature** | | | | | | | **Date** |
| Robert Gatewood | | | | Project Manager | | | |  | | | | | | |  |
| Mark Hughes | | | | Project Sponsor | | | |  | | | | | | |  |
| Jim Turcotte | | | | Project Owner | | | |  | | | | | | |  |

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the project monthly status report document.

# Reflection

This course has taught me the textbook way to be an effective project manager. The textbook took us through all of the steps of effectively planning and carrying out a project; as well as what qualities an effective project manager must exhibit in order to be successful. I also was able to familiarize myself with all of the various forms and templates that are required for the textbook version of a project management plan.

I would have enjoyed reading more case studies and real life events of project manager’s jobs and experiences. It was great just reading the book and learning about the one example that they carried through the entire book, but to actually read about various project managers and their real-life experiences would have helped me a lot. It would have also been nice to read about problems that project managers encountered and how they were able to solve them while keeping the team cohesive and keeping the project on track and under budget.

This course was helpful in the fact that it taught us the textbook way to be an effective project manager. However, I have played the role of project manager in my current job and my role was nothing like the book described. There were significantly fewer forms and reports to write; and the projects I have managed have been successful. It is a good course to help those who have no idea of what a project manager is or what one does, but they should know that the real world and the textbook are two very different scenarios.

After reading the textbook and completing the lessons in this course, nothing really surprised me because I have played this role before in my current job, so I was familiar with what the responsibilities and roles would be.

I would have liked to have read more real life scenarios about project management and how the project managers worked, organized, composed, etc. their projects. I would have liked more reading for what problems were encountered in the real world and how different project managers handled those problems. Overall, I enjoyed the course and think that it would be helpful to anyone who is unfamiliar with project management.