

Portfolio Project Management Plan

Team 2 Enterprises
1234 Orchard Lane
Appleton, Wisconsin
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Scope Management Plan

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Introduction

The Scope Management Plan provides the scope framework for this project. This plan documents the scope management approach; roles and responsibilities as they pertain to project scope; scope definition; verification and control measures; scope change control; and the project's work breakdown structure. Any project communication, which pertains to the project's scope, should adhere to the Scope Management Plan.

Scope Management Approach

For this project, scope management will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement and the Work Breakdown Structure (WBS). The Project Manager, Sponsor and Stakeholders will

establish and approve documentation for measuring project scope, including deliverable quality checklists and work performance measurements. Proposed scope changes may be initiated by the Project Manager, Stakeholders or any member of the project team. All change requests will be submitted to the Project Manager, who will then evaluate the requested scope change. After the scope change request has been approved, the Project Manager will submit the scope change request to the Change Control Board and Project Sponsor for acceptance. After the Change Control Board and Project Sponsor approves the scope changes, the Project Manager will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Manager and Stakeholders, the Project Sponsor is responsible for the acceptance of the final project deliverables and project scope.

Roles and Responsibilities

The Project Manager, Sponsor and team will all play key roles in managing the scope of this project. As such, the project sponsor, manager, and team members must be aware of their responsibilities in order to ensure that work performed on the project is within the established scope through the duration of the project. The table below defines the roles and responsibilities for the scope management of this project.

Name	Role	Responsibilities
Ms. Jones, VP Marketing	Sponsor	• Approve or deny scope change requests as appropriate • Sign Project Charter • Evaluate need for scope change requests • Accept project deliverables and project scope
Kurt Schwartz	Project Manager	• Facilitate and plan meetings • Establish and approve documentation for measuring project scope • Propose changes to project scope • Evaluate changes to the project scope • Measure and verify project scope • Submits scope change request to Change Control Board and Project Sponsor • Facilitate impact analysis of scope change requests • Organize and facilitate scheduled change control meetings • Communicate outcomes of scope change requests with stakeholders • Update project documents upon approval of all scope changes
Judie Thompson	Team Lead	• Measure and verify project scope • Validate scope change requests

		• Participate in impact analysis of scope change requests • Communicate outcomes of scope change requests to team • Facilitate team level change review process
Natalie Lauri	Team Member	• Participate in defining change resolutions • Evaluate the need for scope changes and communicate them to the project manager as necessary
Gary Purdy	Team Member	• Participate in defining change resolutions • Evaluate the need for scope changes and communicate them to the project manager as necessary
Katy Atkinson	Team Member	• Participate in defining change resolutions • Evaluate the need for scope changes and communicate them to the project manager as necessary

Table 1.1, Scope Management Roles and Responsibilities

Scope Definition

The scope for this project was defined through the creation of the Project Charter. As stated in the Business Case, PJ Enterprises has several areas of focus in reaching their business goals, one of which is improving the customer service scores of their telephone operators. In establishing the boundaries of this project, there was a thorough analysis process. First, a gap analysis was completed to determine which areas of customer service were not meeting company expectations. The task analysis served to inform the project team on how to structure the training and which content to include. Using the information from both analyses, the project team developed the Work Breakdown Structure and the Communication Management Plan. The project description and deliverables were developed based on the findings of the gap and task analyses, collaboration with subject matter experts in customer service, and employee/customer feedback.

Project Scope Statement

This project includes the design, development, and implementation of customer service training for PJ Enterprises' current and future telephone operators. The deliverables for this project include phone etiquette training (using both instructor-led training and computer-based training) and an interview screening guide for use by PJ Enterprises' HR department in hiring operators. The project will be accepted once the training has been developed and the interview screening guide has been reviewed by stakeholders. Team 2 Enterprises instructional design team will develop the instructor-led training, the

CBT, and the interview screening guide. Two of its trainers will facilitate the training in two sessions. This project does not include ongoing classroom instruction or technical maintenance of the CBT. The project is not to exceed 60 days in duration or \$90,000 in spending. Assumptions for this project are that support will be provided by the project sponsor and adequate funding and resources will be allocated for the successful completion of this project.

Addendum: On 28th of August 2020, an additional \$4,000 was approved for a change to Computer-Based Training development for Professional Voice Audio Recording.

Work Breakdown Structure

In order to effectively manage the work required to complete this project, it will be subdivided into individual work packages. This will allow the Project Manager to more effectively manage the project's scope as the project team works on the tasks necessary for project completion.

The project is broken down into three phases: the design phase, the development phase and the execution phase. Each of these phases is then subdivided further down to work packages, which will require no more than 40 hours of work and no less than 4 hours of work (see WBS structure below).

PJ Enterprises Project		
Project Management (PM)	Phone Etiquette Training (PET)	Interview Screening Guide (ISG)
• Initiate the project • Control Scope • Develop the project plan • Monitor and control the plan • Review Vendor Contracts • Monitor and report on progress and Quality Control of Interview Screening Guide and Facilitator's Guide • Manage stakeholders • Maintain risks and opportunity awareness • Closeout procedures	• Conduct gap analysis • Conduct task/job analysis • Develop Instructional Objectives • Develop Instructional Lead Material • Develop Facilitator's Guide • Develop Storyboard • Develop CBT • Develop Professional Voice Audio Recording • Develop Quality Control • Facilitator Guide rehearsal • Execute instructor lead training content (ILT) • Evaluate Trainee Performance	• Conduct task/job analysis • Develop interview screening guide • Research ISG content • Present ISG to HR

Scope Verification

As this project progresses the Project Manager will verify interim project deliverables against the original scope as defined in the scope statement and WBS. Once the Project Manager verifies that the scope meets the requirements defined in the project plan, the Project Manager and Sponsor will meet for formal acceptance of the deliverable. During this meeting, the Project Manager will present the deliverable to the Project Sponsor for formal acceptance. The Project Sponsor will accept the deliverable by signature. This will ensure that project work remains within the scope of the project on a consistent basis throughout the life of the project.

Scope Control

The Project Manager and the project team will work together to control the scope of the project. The Project Manager will oversee the project team and the progression of the project to ensure that this scope control process is followed.

If a change to the project scope is needed, the process for recommending changes to the scope of the project must be carried out. Only Judie Thompson and Ms. Jones can request changes to the project scope. All change requests must be submitted to the Project Manager in the form of a project change request document. The Project Manager will then review the suggested change to the scope of the project. The Project Manager will then either deny the change request if it does not apply to the intent of the project, or convene a change control meeting between the project team and Sponsor to review the change request further and perform an impact analysis of the change. If the change request receives initial approval by the Project Manager and Sponsor, the Project Manager will then formally submit the change request to the Change Control Board. If the Change Control Board approves the scope change, the Project Sponsor will then formally accept the change by signing the project scope change request. Upon acceptance of the scope change by the Change Control Board and Project Sponsor, the Project Manager will update all project documents and communicate the scope change to all project team members stakeholders.

Scope Change Request Form Template

Step 1. *Requesting official states nature of scope change required:* Requesting professional voice and audio recordings be used to support the CBT.

Requesting Official: _____ Signature: _____
Date: _____

Step 2. *Project Manager validates that requesting official is authorized to make scope changes.*

Accept: _____ Initials of Authorizer: _____ Date: _____
Reject: _____
Validating Official: _____ Signature: _____

Step 3. *Estimate of cost and time to accomplish scope change:*

- Cost: _____

- Time: _____
 - Description of Change: _____

Estimate by: _____
Date: _____

Signature: _____

Step 4. *Describe the impact of scope change on the schedule end date:*

Determination by: _____(name of PM) Signature: _____

Step 5. *Requesting official indicates acceptance or rejection:* (Check One.)

___ Accept additional cost and schedule impacts of this change.

___ Reject additional cost and schedule impacts of this change.

Authorizing Official: _____
Date _____

Signature: _____

Step 6. *Project Manager changes planning and baseline documents to reflect scope change.*

- WBS
- Schedule
- Charter Document/Budget
- Risk Assessment
- User Impact Analysis
- Implementation Study

Step 7. *Project Manager communicates scope change to appropriate stakeholders.*

Email notification sent to _____ (Project Sponsor and Key Stakeholders) on
_____(date) by: _____ (Name of Project Manager) _____
(Date:)

- See enclosure 1

Step 8. *Project Manager annotates scope change in the Scope Change Log.*

Scope Change Log (SCL) updated with SCRF 0001 on 8/29/2020.

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- See enclosure 2

Enclosed:

- Scope Change Request: _____
- Change Request Log: _____

Communications Management Plan

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Introduction

This Communications Management Plan sets the communications framework for this project. It will serve as a guide for communications throughout the life of the project and will be updated as communication needs change. This plan identifies and defines the roles of persons involved in this project. It also includes a Communications Matrix, which maps the communication requirements of this project, and communication guidelines, which sets the norms for meetings. Last, the Communication Management Plan provides the Project Team Directory with contact information for all stakeholders directly involved in the project.

Communications Management Approach

The Project Manager will take a proactive role in ensuring effective communications on this project. The communications requirements are documented in the Communications Matrix (see page 8). The Communications Matrix is a guide that specifies what information will be communicated, who will communicate the information, when the information will be communicated and to whom the information will be communicated to.

As with most project plans, updates or changes may be required as the project progresses or as changes are approved. Communication updates or changes may occur with changes in personnel, scope, budget, or other reasons. Moreover, communications updates may occur as the project matures and additional requirements are needed.

The project manager is responsible for managing all proposed and approved changes to the Communications Management Plan. Once the change is approved, the project manager will update the plan and supporting documentation and will distribute the updates to the project team and all stakeholders. This methodology is consistent with

the project's change protocol and ensures that all project stakeholders remain aware and informed of any changes to communications management.

Communications Management Constraints

All project communication will occur within the project's approved budget, schedule, and resource allocations. *The project manager is responsible for ensuring that communication activities are performed by the project team and without external resources which will result in exceeding the authorized budget.* Communication will occur in accordance with the frequencies detailed in the Communication Matrix in order to ensure the project adheres to schedule constraints. Any deviation of these timelines may result in excessive costs or schedule delays and must be approved by the project sponsor.

Team 2 Enterprise's policy states that where applicable, standardized formats and templates must be used for all formal project communications. The details of these policy requirements are provided in the section titled "Standardization of Communication" in this document.

Team 2 Enterprise's policy also states that only a Vice President or higher-level employee may authorize the distribution of confidential information. *The project manager is responsible for ensuring that approval is requested and obtained prior to the distribution of any confidential information regarding this project.*

Stakeholder Communication Requirements

As part of identifying all project stakeholders, the project manager will communicate with each stakeholder in order to determine their preferred frequency and method of communication. This feedback will be maintained by the project manager in the project's Stakeholder Register. Standard project communications will occur in accordance with the Communication Matrix; however, depending on the identified stakeholder communication requirements, individual communication is acceptable and within the constraints outlined for this project.

In addition to identifying communication preferences, stakeholder communication requirements must identify the project's communication channels and ensure that stakeholders have access to these channels. *If project information is communicated via secure means or through internal company resources, all stakeholders, internal and external, must have the necessary access to receive project communications.*

Once all stakeholders have been identified and communication requirements are established, the project team will maintain this information in the project's Stakeholder Register and use this, along with the project communication matrix as the basis for all communications.

Roles

Project Sponsor

Ms. Jones (VP Marketing) is the champion of the project and has authorized the project by signing the project charter. Ms. Jones is responsible for the funding of the project and is ultimately responsible for its success. Since Ms. Jones is at the executive level, communications should be presented in summary format unless Ms. Jones requests more detailed communications.

Key Stakeholders

Normally Stakeholders include all individuals and organizations who are impacted by the project. For this project we are defining a subset of the stakeholders as Key Stakeholders. These are the stakeholders with whom we need to communicate with and are not included in the other roles defined in this section. Key Stakeholders include executive management with an interest in the project and ***key users identified for participation*** in the project.

Change Control Board

The Change Control Board is a designated group that reviews technical specifications and authorizes changes. Technical design documents, user impact analysis and implementation strategies are typical of the types of communication this group requires.

Customer

The customer for this project is PJ Enterprises (represented by Judie Thompson). They will review the project's progress, approve stages, and accept the project's final deliverable. They will also be informed of the project status including potential impacts to the schedule for the final deliverable or the product itself.

Project Manager

Mr. Kurt Schwartz has overall responsibility for the project. Mr. Schwartz manages day to day resources, provides project guidance, and monitors and reports on the project's metrics as defined in the Project Management Plan. As the person responsible for the execution of the project, Mr. Schwartz is the primary communicator for the project and responsible for distributing information according to this Communications Management Plan.

Project Team

The Project Team is comprised of all persons who have a role of performing work on the project. The project team needs to have a clear understanding of the work to be completed and the framework. Since the Project Team is responsible for completing the work on the project, they play a key role in creating the Project Plan, including defining its schedule and work packages. *The Project Team requires a detailed level of communications, which is achieved through day to day interactions with the Project Manager and other team members along with two weekly team meetings.*

Steering Committee

The Steering Committee includes management representing the departments during the project. The Steering Committee provides strategic oversight for changes, which impact the overall organization. The purpose of the Steering Committee is to ensure that changes within the organization are affected in such a way that it benefits the entire organization. *The Steering Committee communication occurs on matters which will change the scope of the project and its deliverables.*

Project Team Directory

The following table presents contact information for all persons identified in this communications management plan. The email addresses and phone numbers in this table will be used to communicate with these people.

Role	Name	Title	Organization/ Department	Email	Phone
Project Sponsor	Ms. Jones	VP of Marketing	IT	jones@abc.com	(555) 555-1212
Project Manager	Mr. Schwartz	Project Manager	Project Management	schwaretzk@abc.com	(555) 555-1414
Key Stakeholders	Ms. Jones, Sheena Perez, Judie Thompson	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register
Team Lead	Judie Thompson	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register
Project Stakeholders	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register	See Stakeholder Register
Customer	PJ Enterprises Judie Thompson	Catalog Director	IT	J.Doe@xyz.com	(615) 555-8121
Project Team	Kurt Schwartz	As assigned	Instructional Design	schwaretzk@abc.com	(111) 222-3333
	Katy Atkinson	As assigned		atkinsonk@abc.com	(111) 222-4444
	Natalie Lauri	As assigned		laurin@abc.com	(111) 222-5555
	Gary Purdy	As assigned		purdyg@abc.com	(111) 222-6666
	To Be Assigned	Trainer		To be assigned	(111) 222-3333
		Trainer			
		Training Coordinator			

Communication Methods and Technology

The project team will determine, in accordance with Team 2 Enterprise's organizational policy, the communication methods and technologies based on several factors to include: *stakeholder communication requirements*, available technologies (internal and external), and organizational policies and standards.

Team 2 Enterprise's uses a OneDrive/SharePoint platform to provide updates, house documents, and conduct project communications. This platform enables management, as well as stakeholders with compatible technology, to access project data and communications at any time. OneDrive/SharePoint also provides the ability for stakeholders and project team members to collaborate on project work and communication.

Team 2 Enterprises Enterprise maintains software licenses. All project teams are responsible for developing, maintaining, and communicating schedules using this software. The project schedule will be maintained on both the OneDrive/SharePoint platform and the project website.

All project communication and documentation, in addition to being maintained on the OneDrive/SharePoint platform and project website, will be archived on the internal Team 2 Enterprises Enterprise OneDrive. Organizational naming conventions for files and folder will be applied to all archived work.

Communication Matrix

The following table identifies the communications requirements for this project.

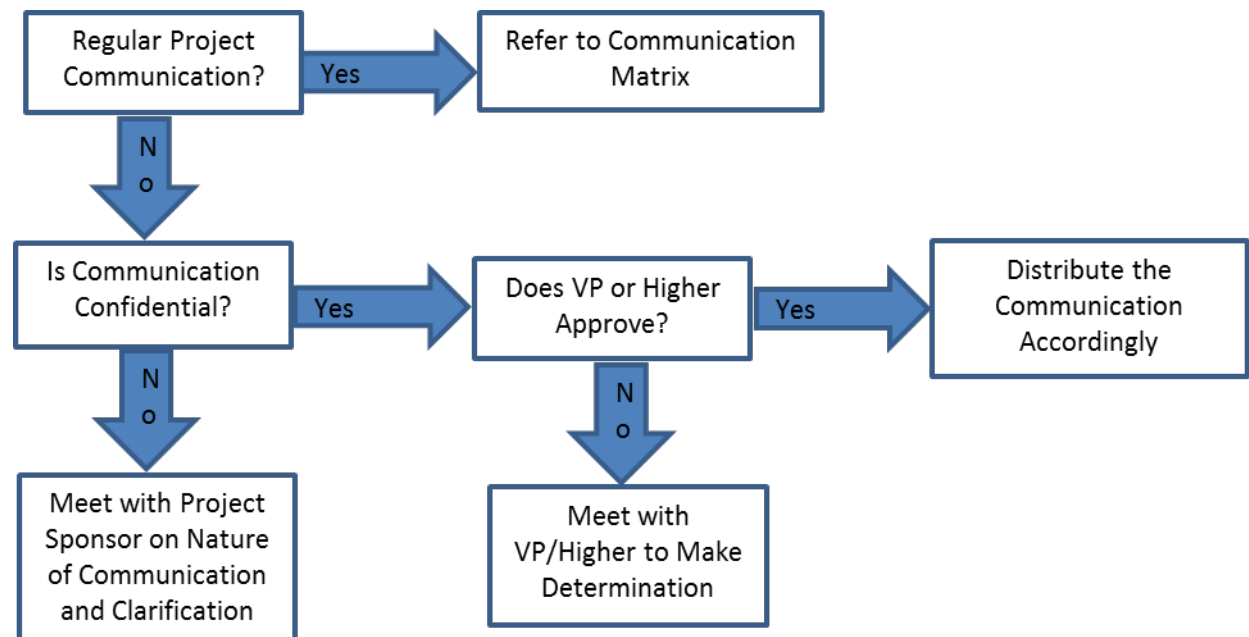
Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Kickoff Meeting	Introduce the project team and the project and review project purpose and management approach	Face-to-face Webinar (Zoom)	Once	Ms. Jones Project Team Key-Stakeholders	Project Manager (Kurt)	Agenda Meeting Minutes	Soft copy archived on project OneDrive/SharePoint site and project website
Project Team Meetings	Review status of the project with the team	Face-to-face Webinar (Zoom)	Twice weekly	Project Team	Project Manager (Kurt) Meeting	Agenda Meeting Minutes Project Schedule	Soft copy archived on project OneDrive/SharePoint site and project web site

					Chair (Katy)		
Project Status Meetings	Report on the status of the project to management	Face-to-face Webinar (Zoom)	Bi-weekly	Project Team	Project Manager (Kurt)	Slide updates Project Schedule	Soft copy archived on project OneDrive/SharePoint site and project web site
Project Status Reports	Report the status of the project including activities, progress, costs and issues	Email Face-to-face if requested	Weekly / As needed	Ms. Jones Project Team Sheena Perez Judie Thompson	Project Manager (Kurt)	Project Status Report Project Schedule	Soft copy archived on project OneDrive/SharePoint site and project web site
Change Request	Address change requests	Email or conference call as needed for clarification	As required	Project Manager Judie Thompson Request originator As needed	Project Manager (Kurt)	Change Request Form User Impact Analysis Implementation strategies Technical design documents	Soft copy archived on project OneDrive/SharePoint site and project web site Original hard copy with signatures maintained in the Change Request Log binder
Vendor Coordination	To maintain awareness of outsourced items	Email / Phone call	Weekly / As needed	All external vendors	Project Manager (Kurt) Designate rep—(Natalie)	Status report of outsourced items	Soft copy archived on project OneDrive/SharePoint site and project web site

Communication Flowchart

The communication flowchart below was created to aid in project communication. This flowchart provides a framework for the project team to follow for this project. However, there may be occasions or situations that fall outside of the communication flowchart

where additional clarification is necessary. In these situations, Mr. Schwartz is responsible for discussing the communication with the Project Sponsor (Ms. Jones) and deciding how to proceed.



Communication Guidelines for Meetings

Meeting Agenda

Meeting Agenda will be distributed two business days in advance of the meeting. The Agenda should identify the presenter for each topic along with a time limit for that topic. *The first item in the agenda should be a review of action items from the previous meeting.*

Meeting Minutes

Meeting minutes will be available 2 business days following the meeting. *Meeting minutes will include the status of all items from the agenda along with new action items and the Parking Lot list.*

Action Items

Action Items are recorded in both the meeting agenda and minutes. Action items will include both the action item along with the owner of the action item. *Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action items resulting from the meeting.* The review of the new action items will include identifying the owner for each action item.

Meeting Chairperson

Katy Atkinson is responsible for ensuring the availability of the meeting agenda and for facilitating the meeting. *The Chairperson will ensure that the meeting starts and ends on time and that all presenters adhere to their allocated time frames.*

Note Taker

Natalie Lauri is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting. The Note Taker will ensure that a copy of the notes is available to the Chair Person at the end of the meeting.

Timekeeper

Gary Purdy is responsible for helping the facilitator adhere to the time limits set in the meeting agenda. The Timekeeper will let the presenter know when they are approaching the end of their allocated time.

Parking Lot

The Parking Lot is a tool used to record and defer items which are not on the meeting agenda, but which merit further discussion later or through another forum.

A parking lot record should identify an owner for the item as that person will be responsible for ensuring follow-up. *The Parking Lot list is included in the meeting agenda.*

Communication Standards

For this project, Team 2 Enterprises will utilize standard organizational formats and templates for all formal project communications. Formal project communications are detailed in the project's communication matrix and include:

Kickoff Meeting – team will utilize Team 2 Enterprise's standard templates for meeting agenda and meeting minutes. Additional templates, such as the standard slideshow template, may also be used.

Project Team Meetings – team will utilize Team 2 Enterprise's standard templates for meeting agenda and meeting minutes. Additional templates, such as the standard slideshow template, may also be used.

Project Status Meetings - team will utilize Team 2 Enterprise's standard templates for meeting agenda and meeting minutes. Additional templates, such as the standard slideshow template, may also be used.

Project Status Reports – team will utilize Team 2 Enterprise's standard templates for meeting agenda and meeting minutes. Additionally, the standard project status report document, available on the share drive, will be used to provide project status.

Informal project communications should be professional and effective. There is no standard template or format that must be used.

Communication Escalation Process

With regards to the communication escalation process, efficient and timely communication is the key to successful project completion. It is imperative that any disputes, conflicts, or discrepancies regarding project communications are resolved in a way that is conducive to maintaining the project schedule, ensuring the correct communications are distributed, and preventing any ongoing difficulties. In order to ensure that the project stays on schedule and issues are resolved, Team 2 Enterprises will use its standard escalation model as a framework. This framework, which is presented as a table below, defines the priority levels, decision authorities, and timeframes for resolution.

Priority	Definition	Decision Authority	Timeframe for Resolution
Priority 1	Major impact to project or business operations. If not resolved quickly there will be a significant adverse impact to revenue and/or schedule.	Vice President or higher	Within 4 hours
Priority 2	Medium impact to project or business operations which may result in some adverse impact to revenue and/or schedule.	Project Sponsor	Within one business day
Priority 3	Slight impact which may cause some minor scheduling difficulties with the project but no impact to business operations or revenue.	Project Manager	Within two business days
Priority 4	Insignificant impact to project but there may be a better solution.	Project Manager	Work continues and any recommendations are submitted via the project change control process

**** NOTE:** Any communication including sensitive and/or confidential information will require escalation to VP level or higher for approval prior to external distribution.

Glossary of Communication Technology

Term	Definition
Communication	The effective sending and receiving of information. Ideally, the information received should match the information sent. It is the responsibility of the sender to ensure this takes place.

Stakeholder	Individuals or groups involved in the project or whose interests may be affected by the project's progress, execution and or deliverables.
Communications Management Plan	Portion of the overall Project Management Plan that details how project communications will be conducted, who will participate in communications and what the frequency of communications are.
Escalation	The process that details how conflicts and issues will be passed up the management chain for resolution as well as the timeframe to achieve resolution.

Project Schedule