**P1 – Explain the different phases within an identified project life cycle**

## This task should be completed as a presentation. This should include detailed speaker notes for each slide being delivered to new employees.

## For each section you must also discuss the documentation that is required. This is explained in this document.

## Concept of the Project Life Cycle

When discussing project management phases, the mention of project life cycle is inevitable. So what’s the difference? The project phases make up a project life cycle, and as such, the phases are tailored to fit a project’s needs. The elements of a project life cycle should define:

* What work must be accomplished
* What deliverables must be generated and reviewed
* Who must be involved
* How to control and approve each phase

## 5 Phases of Project Management

Project management is the application of knowledge, skills, tools, and techniques to a broad range of activities in order to meet the requirements of a particular project.” There are five phases of project management and if the lifecycle provides a high-level view of the project, the phases are the roadmap to accomplishing it.



### Phase 1: Project Initiation

This is the start of the project, and the goal of this phase is to define the project at a broad level. This phase usually begins with a business case. This is when you will research whether the project is feasible and if it should be undertaken. If feasibility testing needs to be done, this is the stage of the project in which that will be completed.  
   
Important stakeholders will give the project the go ahead. If it is given the green light, you will need to create **a project brief or** **project charter or a Project Initiation Document (PID) that outlines the purpose and requirements of the project. It should include business needs, stakeholders, and the business case.**

**Documentation required: Report is usually done to present project initiation**

**Documentation - an acceptance document is produced so that all key people such as the project manager, the customer for the project etc sign and agree to an acceptance document which agrees what the project will be and how it will be conducted.**

A **contract** is drawn up between the stakeholder and the organisation(s) at the start of a project. The contract applies to the parties who are going to work on the project. The purpose of a contract is to ensure that everyone agrees on the rules as to how they will operate. Contracts are legal documents. If one of the parties decides to break (breach the contract) they can be sued as they did not agree their part of the agreement.

### Phase 2: Project Planning

This phase is key to successful project management and focuses on developing a roadmap that everyone will follow. This phase typically begins with setting goals. Two of the more popular methods for setting goals are S.M.A.R.T. and CLEAR:

S.M.A.R.T. Goals – This method helps ensure that the goals have been thoroughly vetted. It also provides a way to clearly understand the implications of the goal-setting process.

Specific – To set specific goals, answer the following questions: who, what, where, when, which, and why.  
Measurable – Create criteria that you can use to measure the success of a goal.  
Attainable – Identify the most important goals and what it will take to achieve them.  
Realistic – You should be willing and able to work toward a particular goal.  
Timely – Create a timeframe to achieve the goal.

For more information about S.M.A.R.T. goals and to download free S.M.A.R.T. goal templates, read "[The Essential Guide to Writing S.M.A.R.T. Goals](https://www.smartsheet.com/blog/essential-guide-writing-smart-goals)."  
   
C.L.E.A.R. Goals – A newer method for setting goals that takes into consideration the environment of today’s fast-paced businesses.

* Collaborative – The goal should encourage employees to work together.
* Limited – They should be limited in scope and time to keep it manageable.
* Emotional – Goals should tap into the passion of employees and be something they can form an emotional connection to. This can optimize the quality of work.
* Appreciable – Break larger goals into smaller tasks that can be quickly achieved.
* Refinable – As new situations arise, be flexible and refine goals as needed.  
     
  During this phase, the scope of the project is defined and a project management plan is developed. It involves identifying the cost, quality, available resources, and a realistic timetable. The project plans also includes establishing baselines or performance measures. These are generated using the scope, schedule and cost of a project. A baseline is essential to determine if a project is on track.  
     
  At this time, roles and responsibilities are clearly defined, **so everyone involved knows what they are accountable for**. Here are some of the documents a PM will create during this phase to ensure the project will stay on track:  
  **Documentation:**
* **Scope Statement** – A document that clearly defines the business need, benefits of the project, objectives, deliverables, and key milestones. A scope statement may change during the project, but it shouldn’t be done without the approval of the project manager and the sponsor.
* **Work Breakdown Schedule** (WBS) –This is a visual representation that breaks down the scope of the project into manageable sections for the team.
* Milestones – Identify high-level goals that need to be met throughout the project and include them in the Gantt chart.
* [**Gantt Chart**](https://www.smartsheet.com/gantt-chart-software) (Project planner) – A visual timeline that you can use to plan out tasks and visualize your project timeline.
* **Issues Register –** A document that will identify and monitor issues within a project. For example ensuring that all staff are on target with their specific role/job. Or that training is specifically required for a group of staff.
* **Communication Plan** – This is of particular importance if your project involves outside stakeholders. Develop the proper messaging around the project and create a schedule of when to communicate with team members based on deliverables and milestones.
* **Risk Management Plan** (Risk register) – Identify all foreseeable risks. Common risks include unrealistic time and cost estimates, customer review cycle, budget cuts, changing requirements, and lack of committed resources.

* **Documentation - a quality management plan is produced to ensure that the quality of the project is maintained throughout to ensure it meets the needs of the project customer and ties all workers on the project to making sure that the project is created to the required level.**
* **Documentation - A resource plan is also needed to identify the resources that are required for all aspects of the project. Explain why it is important to identify what resources are required.**
* **Documentation - A risk management plan identifies any potential problems that may occur. Explain the benefits of this and the costs.**

**Phase 3: Project Execution**

This is the phase where deliverables are developed and completed. This often feels like the meat of the project since a lot is happening during this time, like status reports and meetings, development updates, and performance reports. A “kick-off” meeting usually marks the start of the Project Execution phase where the teams involved are informed of their responsibilities.  
   
Tasks completed during the Execution Phase include:

* Develop team
* Assign resources – for example, staff equipment etc.
* Execute project management plans
* Procurement management if needed
* PM directs and manages project execution
* Set up tracking systems
* Task assignments are executed
* Status meetings
* Update project schedule
* Modify project plans as needed

 While the project monitoring phase has a different set of requirements, these two phases often occur simultaneously.  
   
*Tip: Consider using cloud-based project management software so team members can update task status in real time. For example using Google Drive*

**Documentation required: Minutes from meetings**

Review of progress by checking tasks completed against the project plan in the gantt chart

### Phase 4: Project Performance/Monitoring

This is all about measuring project progression and performance and ensuring that everything happening aligns with the project management plan. Project managers will use key performance indicators (KPIs) to determine if the project is on track. A PM will typically pick two to five of these KPIs to measure project performance:

* Project Objectives: Measuring if a project is on schedule and budget is an indication if the project will meet stakeholder objectives.
* Quality Deliverables: This determines if specific task deliverables are being met.
* Effort and Cost Tracking: PMs will account for the effort and cost of resources to see if the budget is on track. This type of tracking informs if a project will meet its completion date based on current performance.
* Project Performance: This monitors changes in the project. It takes into consideration the amount and types of issues that arise and how quickly they are addressed. These can occur from unforeseen hurdles and scope changes.

### Documentation required: Project plan matched against reality

### Gantt charts

### Minutes of meetings

### A project progress report should be used to report on the progress of the project throughout the duration of the project.

### Phase 5: Project Closure (Evaluation Phase)

This phase represents the completed project. Contractors hired to work specifically on the project are terminated at this time. Valuable team members are recognized. Some PMs even organize small work events for people who participated in the project to thank them for their efforts. **Once a project is complete, a PM will often hold a meeting – sometimes referred to as a “post mortem” – to evaluate what went well in a project and identify project failures. This is especially helpful to understand lessons learned so that improvements can be made for future projects.**Once the project is complete, PMs still have a few tasks to complete. They will need to create a project punch list of things that didn’t get accomplished during the project and work with team members to complete them. Perform a final project budget and prepare a final project report. Finally, they will need to collect all project documents and deliverables and store them in a single place.

A lessons learned register is also critical to identify what went well with the project and areas for improvement that can be applied to projects in the future. This document can be referred to when starting a new project to ensure that it runs as smoothly as possible.

**Client acceptance form** – This is a document that will require the agreement from the project sponsor/budget holder to make sure that the project is complete.  
   
*Tip:*[*Using a cloud-based software solution is an easy way to collect and save all project documents*](https://twitter.com/intent/tweet?text=%22Using%20a%20cloud-based%20software%20solution%20is%20an%20easy%20way%20to%20collect%20and%20save%20all%20project%20documents%22+http://bit.ly/1lg3LQy%20via+%40Smartsheet)*in one location throughout the life of the project.*

**Documentation required:** A project closure report is required to evaluate how well the project was planned and implemented. This report will evaluate how well the project meet it’s objectives and if there were any problems with it.