



CERTIFICATION



LEVEL 2

Service Essentials

Project Management Best Practices to Eliminate Scope Creep and Seep

Presented by :

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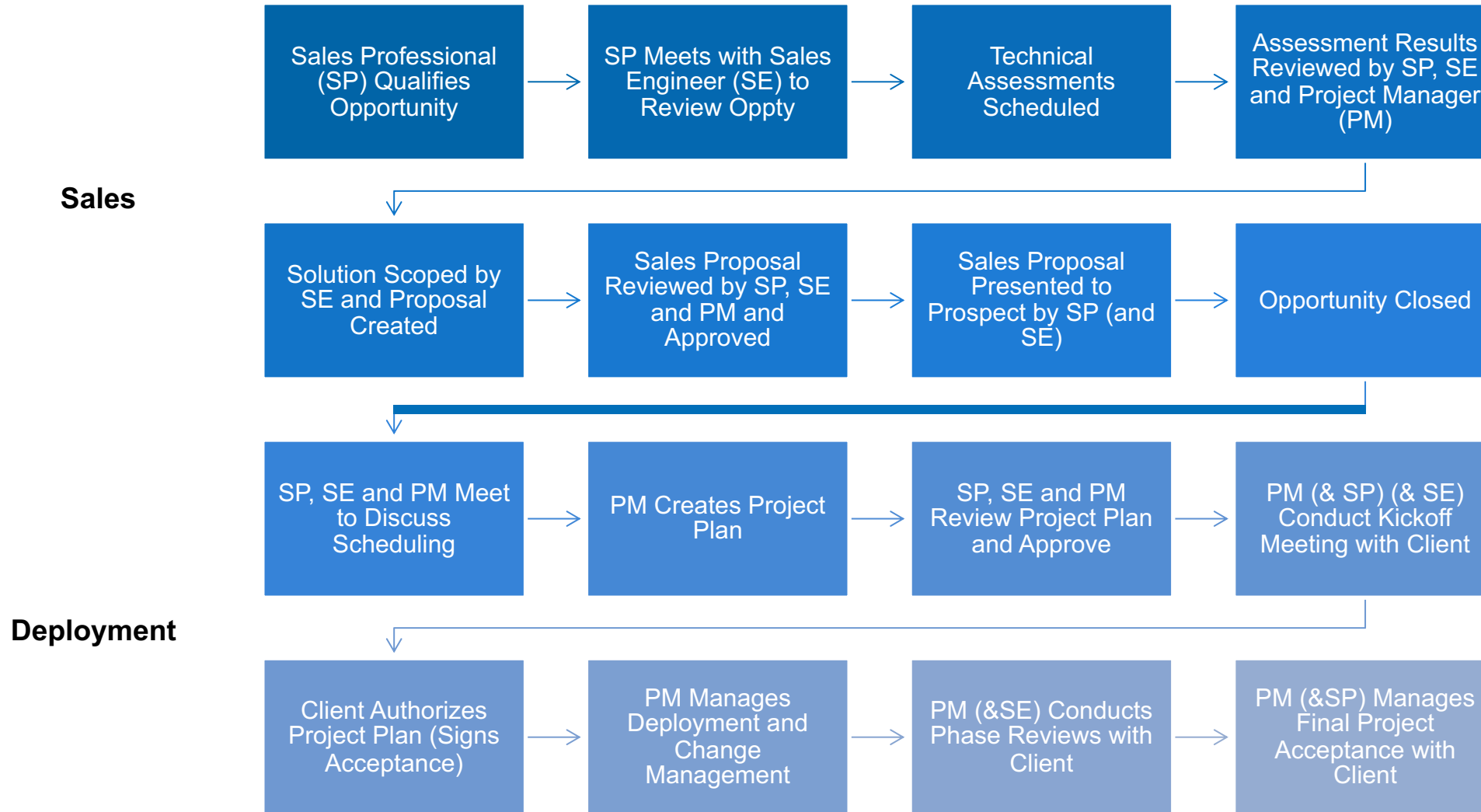
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Effective Project Management is critical to maintaining client satisfaction, efficiencies and profitability

Sales and Project Management Flow



Project Manager's Role

- One of the most important roles in the organization
- Pre- and Post-sales responsibilities
- Key to project profitability
- Helps define project scope
- Develops and manages project plan and implementation
- Determines methods to be utilized during project implementation
- Identifies all tasks to be completed during project implementation
- Creates a timeline and expected duration for each task's completion
- Estimates and allocates resources for each task's completion



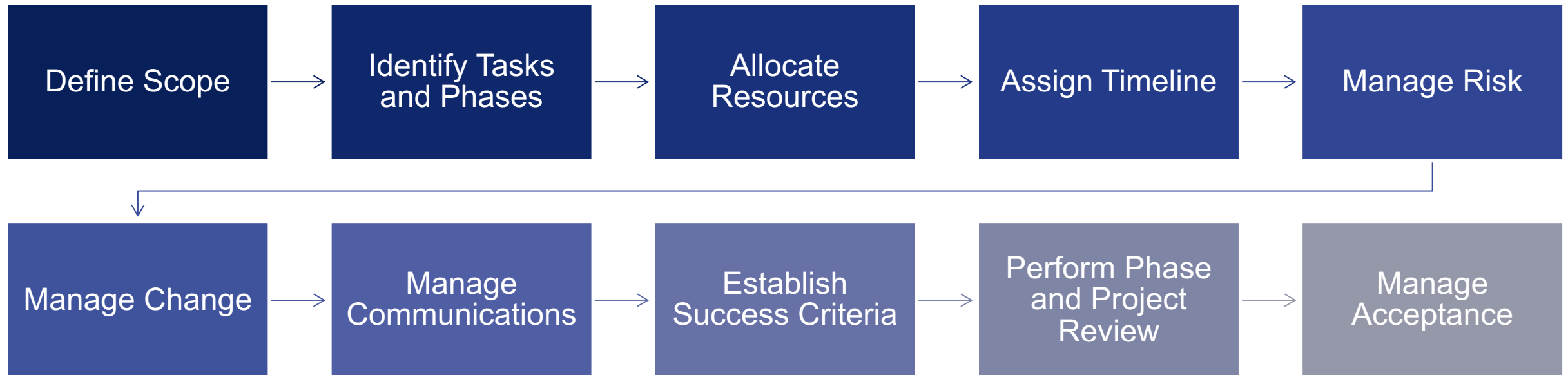
Creating Your Project Plan

Objectives of Project Plan

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound



Project Plan Creation





After Project Plan Creation

- Presentation to client
- Receive approval of overall project plan
- Verify project schedule against customer's calendar
- Identify and allocate client resources required for Project Implementation
- Agree to roles, responsibilities and task assignment between all parties

The Project Kick-Off Meeting

During Kick-Off Meeting

- Agree to the Risk Management plan
- Agree to the Change Control process
- Agree to the Communication and Status Reporting processes
- Agree to Acceptance criteria
- *Project Manager does not meet with client without Sales Professional





Section 1. General Information

Project Name		Date	
Client Company Name			
Client Contact Name	Phone	Email	Fax
Project Manager Name	Phone	Email	Fax

Section 2. Scheduling

Check all that apply.					
Project Start Date:	Phase 1 Start Date:	Phase 2 Start Date:	Phase 3 Start Date:	Phase 4 Start Date:	Phase 5 Start Date:
Project End Date:	Phase 1 End Date:	Phase 2 End Date:	Phase 3 End Date:	Phase 4 End Date:	Phase 5 End Date:

Section 3. Resource Allocation and Role Assignment

Resource	Role

Section 4. Risk Management Plan

Phase 1:
Phase 2:
Phase 3:
Phase 4:
Phase 5:



Section 5. Change Control Process

Should the unforeseen need to deviate from the established Project Plan be required in order to meet individual phase or overall project objectives, change control will be administered in the following manner:

1. The need for change will be identified, documented and communicated to all affected resources
2. Options will be identified to validate benefit and analyze impact to individual phases and the overall project
3. The best solution to meet overall Project objectives will be chosen
4. The solution will be documented and communicated to all affected resources for approval
5. A change order will be submitted to authorize the change and any modification to project budget
6. Change will be implemented, the results evaluated and the process and outcome documented and communicated to all affected resources

Section 6. Communication and Status Reporting Process

Consistent, proactive communication and status reporting will be conducted at regular intervals during project implementation to keep all affected resources informed of the status of each individual phase and overall project progress. Resources to receive these communications and status updates include:

1.

Name	Email Address	Phone	Cell
------	---------------	-------	------
2.

Name	Email Address	Phone	Cell
------	---------------	-------	------
3.

Name	Email Address	Phone	Cell
------	---------------	-------	------

Section 7. Success Criteria

The criteria for success for each project phase are as follows:

- Phase 1:
Phase 2:
Phase 3:

Section 8. Final Project Acceptance Criteria

Client agrees that the success of each Project Phase as measured by the criteria in Section 7 will confirm the satisfactory success of the overall project, allowing for Project to be considered finalized and accepted as complete.

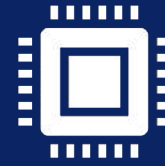
Section 9. Project Management Plan Acceptance

Approved By

Date

After Project Plan Acceptance: Procurement

*Project Manager works with internal or external procurement sources to order and confirm delivery of correct hardware, software and services



Necessary hardware is sourced and ordered



Necessary software is sourced and ordered



Necessary services are sourced and ordered

Project Management

- Project Manager manages all resources
- Internal resources
- Client resources
- Vendors





Project Implementation

- Phases of project may be conducted at
- Solution Provider's location
- Client's location(s)
- Vendors' location(s)
- The Cloud!

Project KPIs



Active & Scheduled Projects



Projects/Phases Under / Over Budget



Task/Phases Overdue / Completed



Changes Pending / Approved



Technician Utilization / Profit



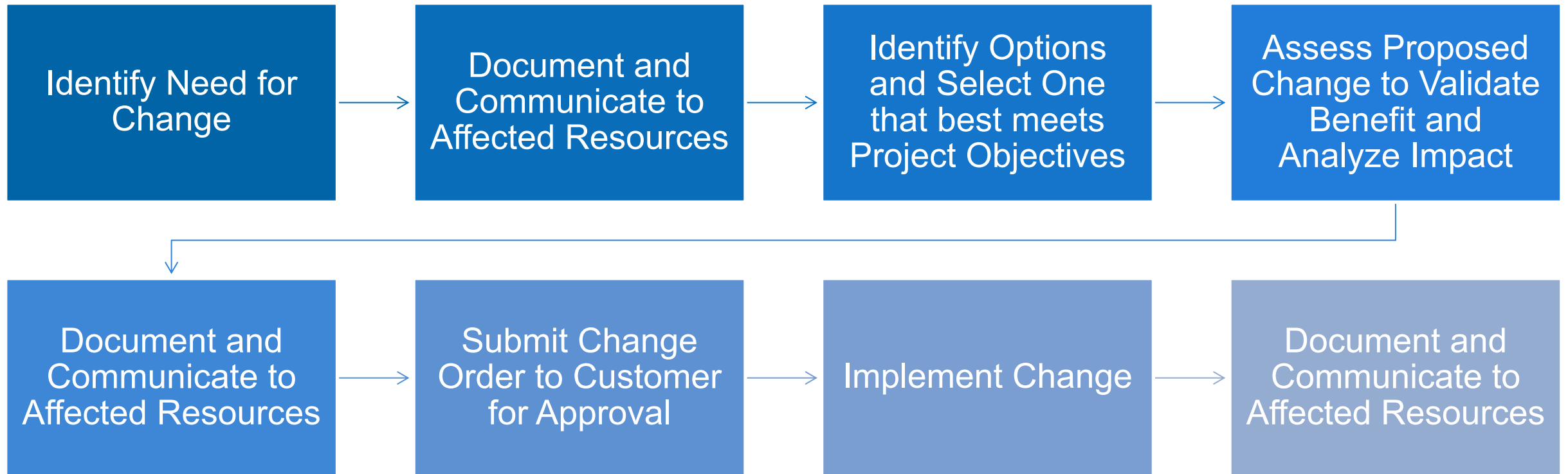
Actual Project Cost / Profitability



Customer Satisfaction

Change Management

Change Control





Section 1. General Information

Project Name		Date	
Client Company Name			
Client Contact Name	Phone	Email	Fax
Project Manager Name	Phone	Email	Fax

Section 2. Affected Areas

Check all that apply.			
<input type="checkbox"/> Project Start Date	<input type="checkbox"/> Project End Date	<input type="checkbox"/> Contract Amount	<input type="checkbox"/> Project Costs
<input type="checkbox"/> Project Scope	<input type="checkbox"/> Technology	<input type="checkbox"/> Major Deliverables/ Outcomes	<input type="checkbox"/> Roles/Responsibilities
If there are changes in the project amount or project completion date, at a minimum, REVISE: • Project Plan & Project Schedule			

Section 3. Change Summary

Currently Approved Dates/Costs				Requested Revisions to Dates/Costs			
Start Date	End Date	Contract Amount	Project Cost	Start Date	End Date	Contract Amount	Project Cost

Section 4. Justification Summary

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Section 5. Change Authorization

Requested By	Date
Approved By	Date

Project Phase Review



PROJECT PHASE/OVERALL PROJECT ACCEPTANCE

Section 1. General Information

Project Name		Date	
Client Company Name			
Client Contact Name	Phone	Email	Fax
Project Manager Name	Phone	Email	Fax

Section 2. Project Phase/Overall Project

Check appropriate Phase		
<input type="checkbox"/> Phase 1	<input type="checkbox"/> Phase 3	<input type="checkbox"/> Phase 5
<input type="checkbox"/> Phase 2	<input type="checkbox"/> Phase 4	<input type="checkbox"/> Overall Project

Section 3. Project Phase/Final Project Acceptance

The indicated Phase or Overall Project has been accepted as completed satisfactorily based upon the previously established criteria for success.

Section 9. Project Phase/Overall Project Acceptance

Approved By

Date



Project Completion

- Sign-off requires
- Success of each phase of project measured satisfactorily
- Management of timeline, budget and resources measured satisfactorily
- Communication management process measured satisfactorily
- Change management process measured satisfactorily
- Client, stakeholder and other resources' expectations managed satisfactorily

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