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Management Approach Definition Template

<< Project Name >>

<< Author >>

# **Purpose of this document**

|  |  |
| --- | --- |
|  | * To describe the overall approach for managing delivery of the project. * To describe how the AgilePM approach needs to be tailored for use on this project, considering the AgilePM principles and the placement of contingency (by default covered by the Could Have requirements). * To identify individuals playing key roles on the project and define their responsibilities (including any external resources interfacing directly with the internal members of the project team). Note that responsibilities should already have been discussed and agreed with individuals concerned. This document should record what has been agreed not just the ideal or the expected situation * To describe how essential project management practices will be applied. (e.g. Risk and Issue Management, Configuration Management, Change Control, Communication, Monitoring and Control). |

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|  | **Project Role** | **Name** | **Signature & Date** |
| **Produced by:** | Project Manager |  |  |
| **Approved by:** | Business Sponsor |  |  |

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# Project Overview

## Objectives and Success Criteria

Provide a brief explanation of why we are doing this project and how we are going to measure success. Use the Business Vision section of the Business Case as the basis for this section.

## Milestone Plan

Define the key milestones and when major products/product increments will be delivered. The Delivery Plan will provide the full schedule and resource allocations so this is the place for highlights only. Where the project is to be managed in stages using discretely funded packages of work ensure that the schedule for these is clear. Note: the work packages should be aligned with delivery increments where possible. A delivery increment typically has an elapsed time of between three and six months. Use the table below to illustrate the combination of these items and their inter-relationship – the pre-populated content in the table is for **example only**

|  |  |
| --- | --- |
| **Milestone** | **Date** |
| **Project Start Date** | **dd/mm/yy** |
| **Increment 1 Start Date** |  |
| **Delivery of product abc** |  |
| **Delivery of product xyz** |  |
| **Increment 1 End Date** |  |
| **…** |  |
| **Final Delivery and Sign-off** |  |
| **Project End date** |  |

## Major Project Dependencies

Describe any key business dependencies, and/or dependencies associated with other programmes or projects that exist for this project. Outline the strategy for dealing with these. This will only be possible at a very high level during Feasibility with detail expected to emerge as the project proceeds through the Foundations phase

## Constraints and Pre-requisites

### Scheduling

State any constraints that may impact on start date for development of the solution or the start/end dates of the project and/or Project Increments

### Contractual

Describe any constraints or pre-requisites associated with contracts with third parties e.g. for delivery of goods or services required before or during the project. Remember lead times related to negotiation and agreement of formal contracts may be long, especially if legal teams involved have little experience with Agile projects

### Resourcing

Describe any constraints or pre-requisites associated with the people who will be working on the project. Include things such as when key/critical people from the business, development teams and third parties are expected to be made available for the project, training of teams in new technologies or processes etc.

### Budgetary

Describe any budgetary constraints or pre-requisites such as any abnormal financial approvals that may be required, allocation of expenditure across different financial accounting periods etc.

# Project Approach

## Development Approach

Based on the output of the Project Approach Questionnaire, describe how the Lifecycle will be tailored to meet the needs of the project. Specifically in the use of the key Techniques of: Facilitated Workshops, Modelling, Iterative Development, MoSCoW Prioritisation and Timeboxing. Keep this light and focussed on the management and governance perspective. The detail will be covered in the Development Approach Definition

## Management / Governance Review Strategy

Outline here the overall approach to management and governance reviews and, where applicable, testing and other Quality Assurance activity. Do not provide detail here as it will be provided in the Development Approach Definition where necessary.

## Contract Management Strategy

Where appropriate describe how third party contracts related to product development or delivery will be managed. Where contracts are not intrinsically Agile try to ensure predictable incremental delivery as a minimum. If detailed specifications are required try and complete these ‘just in time’ for each incremental ‘work package’ defined in the contract.

## Stakeholder Engagement Strategy

List key stakeholders and stakeholder groups and describe how each will be initially engaged in the project and how their engagement will be maintained for the duration of the project (or part of it, where applicable). During Feasibility this may be based on assumptions but during the Foundations phase the assumption MUST be validated with each individual or group with the result of the agreement stated in the table.

|  |  |
| --- | --- |
| **Stakeholder / Group** | **Strategy for engaging and maintaining engagement** |
|  |  |
|  |  |

# Project Organisation

## Roles and Responsibilities

Although high level descriptions and assumptions are acceptable during Feasibility (except for the project level roles which need to be agreed very early on), the end of the Foundations phase is the latest point at which people must understand and agree to their individual roles and responsibilities. Describe these here or refer out to detailed, personalised, role descriptions if desired. Ensure that any gaps are recorded in the risk log and a mitigation strategy is defined.

## Team Empowerment

Optimal agility requires optimal empowerment of teams. Too little empowerment will slow the teams down. Too much empowerment / misguided empowerment may also result in the solution evolving in an inappropriate way that loses touch with the original Business Vision and strategy In both cases quality is often sub-optimal. Describe here the level and parameters of decision-making and responsibility the team have and the escalation procedures when outside their empowerment boundaries

## Organisation Structure and Governance Oversight

Describe here (ideally using organisation diagrams) the project team structures including the roles and how they fit in the overall project structure. Define the reporting lines out of the project, e.g. for governance by a Steering Committee.

# Project Controls

## Planning and tracking

Outline here the approach to estimation planning, monitoring and control on this project. This will include (where applicable): Progress reporting/tracking process and frequencies, key reviews, health checks and audits. Remember that wherever possible this should be based on transparency of real work rather than written commentary created in parallel to describe the work done.

## Configuration Management

The Configuration Management process must be defined and implemented by the end of Foundations. Describe which classes of deliverables are under configuration management control and outline here what tools, techniques etc. will be used to ensure all the project assets are protected and kept in a known state. The detail of the configuration management of technical deliverables (software, testing products, user documentation etc. is dealt with in the Development Approach Document

## Change Control

This section describes how changes will be managed. Remember that changes to the detail of requirements and the way these are reflected in the solution should not be managed through a formal change control process – it slows things down too much and usually leads to avoidance of the process. Formal change management should be applied only where the scope of the project is changing – this is typically identified by the addition or removal removal of top-level requirements in the Prioritised Requirements List or perhaps substantial change to individual requirements at that level

## Risk Management Process

Describe the approach to managing risk (identifying risk, assessing severity, planning countermeasures) and the risk escalation process.

# Appendix A – Project Approach Questionnaire

The Project Approach Questionnaire is initially completed as part of the Feasibility Assessment (where used). At that time it is used primarily to indicate the likely configuration of the AgilePM framework for the project and to indicate any areas where education or changes to restrictive standards might allow for greater agility. It is completed again towards the end of the Foundations phase to re-assess the preliminary position and to help baseline the combined management / delivery approach described in this document and the Delivery Approach Definition

# Appendix B – Delivery Plan

If it is to be presented and approved in combination with this document the Delivery Plan, which shows the overall schedule of timeboxes and resource allocation, may be appended here. Note that the timebox aspects of the delivery schedule (describing in more detail what each timebox will deliver) will be further evolved in Timebox plans later in the project