

# **PACT Project Plan: Customer/Stakeholder Interview Guide**

## **PACT Project Manager Performance Aid – Alpha Phase: Project Plan/ Proposal**

### **Problem/Opportunity Background**

#### **Customer**

- **Who is/are the customer(s)?**
  - Names, titles, organizations
- **Who is/are the (potential) sponsor(s)?**
  - Names, titles, organizations
- **Who are the other key stakeholders?**
  - Names, titles, organizations

#### **Problem/Opportunity Statement**

- **What is the specific problem/opportunity?**
  - Who, what, where, when, why regarding the symptoms?
  - What are the key metrics (measures) required by each, and what is the actual versus desired performance?
  - Is the cause known or suspected?
  - How will solving the problem benefit the company, organization, stakeholders, etc.?
- **Is the solution being prescribed by the customer?**
  - How flexible and receptive are they to other solutions or redefining the problem?

### **Notes**

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### **Problem/Opportunity Background** *(continued)*

#### **Situational Background**

- What is the background related to this project?
  - What has led up to this?
  - What are the stimuli (stimulus) for undertaking the project?
  - Why is this being addressed now?
  - What other issues and initiatives will impact this project?
  - What other issues and initiatives will be impacted by this project?

### **Project Overview**

#### **T&D Project Objectives**

- What specifically should the project accomplish?
  - What is to be produced and for whom?
  - How will it be measured, in general?

#### **Project Success Criteria**

- What are all the success criteria or metrics per key stakeholder group?
- Over what period of time should we expect to gain improvement?

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### **Project Overview** *(continued)*

- What is the plan for conducting an evaluation of the training and development and the results of the project?
  - Who will conduct the effort?
  - What will be produced and to whom will it be distributed?

### **Deployment Plan**

- How will the training and development be deployed?
- By whom?
- How often?

### **Development Plan**

- Who are the subject matter experts or master performers?
- Are/will they be available to support the development effort?
- What are the constraints on their time and availability?
- Do materials and information currently exist?

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### **Project Scope/ Deliverables/ Approach/ Roles**

#### **Scope**

- What defines the beginning and end points for this project?
  - Project activities
  - Calendar/schedule
- What is included within the scope of the project?
  - Target populations
  - Process(es) or performance boundaries
  - Types of consulting services
- What should be explicitly excluded from the scope of the project?

#### **Deliverables**

- What specifically is to be produced and delivered as a part of the project?
  - Reports, presentations, etc.
- How many iterations are expected for each deliverable?
  - Initial draft
  - Number of additional drafts/updates
- What software packages (and version) will be used to produce the outputs?
- What format, structure, and packaging rules will be followed (as appropriate) for each of the deliverables?

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### **Project Scope/ Deliverables/ Approach/ Roles** *(continued)*

#### **Approach**

- **Who will own the ongoing maintenance of the deliverables?**
  
- **What key methods will be employed to conduct the various activities of the project?**
  - Literature research
  - Surveys (phone or written)
  - Interviews (with whom)
  - Group meetings (with whom and for what purposes)
  - Etc.

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### **Project Scope/ Deliverables/ Approach/ Roles** *(continued)*

#### **Roles and Responsibilities**

- **What are the key roles (role sets) involved in the project?**
  - **Sponsor**
  - **Customer project manager**
  - **Steering Teams**
  - **Analysis Teams**
  - **Design Teams**
  - **Pilot-Test Teams**
  - **Etc.**
  
- **What are the specific responsibilities for each of the roles?**
  - **To direct**
  - **To approve/reject**
  - **To review**
  - **To provide input**

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### **Staff Backgrounds**

- What are the following for each staff member to be assigned to the project?
  - Name, title, organization
  - Assigned project role
  - Credentials (education, work experience, publications, etc.)

### **Project Tasks/ Assignments/ Schedule**

#### **Task Charts**

- What is the reaction to the standard phases for conducting this type of project?
  - What should be the dates for key project milestones that are acceptable?
  - What are the key outputs per phase?
  - What are the key tasks/activities per phase?
- Which role is needed to be involved in which project tasks?
- What are the key schedule dates for key project tasks (review meetings, etc.)?

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### **Project Cost Summary**

- Total project cost
  - Estimated or fixed fee?

### **Project Cost Breakdown**

#### **Staff Costs**

- Number of staff days of involvement required by staff
  - Rate per day

#### **Outside Contractor Costs**

- Number of days of involvement required by outside contractor

#### **Travel and Living**

- Expenses
- How many trips will be required?
  - Average airfare expected
- Number of days out of town
  - Cost per day for food, lodging, ground travel, and miscellaneous expenses

### **Notes**



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### **Cost Breakdown** *(continued)*

#### **Materials**

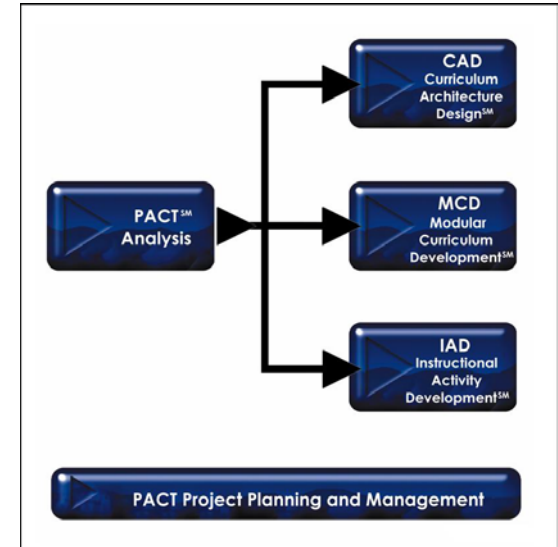
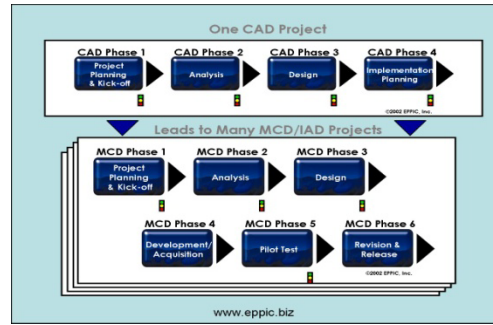
- **What materials will be consumed in the course of the project?**
  - Report binders, tabs, and paper
  - Presentation materials
  - Etc.

#### **Extraordinary Support Services**

- **What additional services will be consumed in the course of the project that are not covered by the daily rate of the staff member?**
  - Word processing temporaries
  - Graphic services
  - Shipping
  - Printing
  - Other duplication
  - Etc.

### **Notes**

**P**erformance-based  
**A**ccelerated  
**C**ustomer-/Stakeholder-driven  
**T**raining & Development<sup>SM</sup>  
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## The Detailed Project Plan

### Narratives

1. Purpose
2. Background
3. Scope
4. Approach
5. Project Phases and Milestones
6. Outputs/Deliverables
7. Roles and Responsibilities
8. Project Tasks/Roles/Schedule

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## Example Task Chart The Detailed Project Plan

Project Tasks	Estimated Days Required							Schedule	
	EPPIC, Inc.			TMC Corporation				Start	End
	GW	CS	PS	PM	PT	PP	Other (each)		
1. Identify, contact, and recruit three to five "Project Team" members for the Working Committee to provide input, critique, and support to the Analysis, Design, Development, and Pilot Testing effort	-	-	-	2.0	-	-	-		
2. Coordinate logistics for Task 4 •Room arrangements •Equipment arrangements •Invitations and information to attendees •Meal/refreshments •Final confirmation of invited attendees' intentions to attend	0.25	-	-	1.0	-	-	-		
3. Prepare to conduct Task 4 •Meeting process design •Presentation preparation •"Straw" models/starter prototypes for use in Task 4	1.0	2.0	2.0	-	-	-	-		
KEY:	EPPIC, Inc. GW = Guy Wallace CS = Consultant Support PS = Production Support			TMC Corporation PM = Project manager PT = Project Team PP = Pilot Participants					

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