

**Project Approach—Activity Definition****Purpose:**

The objective of this activity is to establish a high-level approach of how to achieve the project goals specified in the Project Overview Statement, by developing an implementation approach and project policies/standards. The purpose of this Approach document is to define the type of solution for the project and the method of delivering that solution. This document will re-state the project goal and articulate how this will be achieved. It will also validate which planning elements will be needed for the project.

**Participants:**

Project Manager, Project team, relevant stakeholders, and customer

**Inputs:**

Project Overview Statement [1], Business Case [4], Governance Document [4]

**Process:**

1. The Project Manager can decide whether the project approach should be discussed in the planning kick-off meeting or a separate meeting should be held for this purpose.
2. An explanation of the project life cycle and the various phases of the project will be given in the Project Approach document. Determine if any tailoring of the normal project life cycle will be done.
3. Determine if there are examples of similar projects.
4. Identify any reusable components from other projects that can save effort, cost, and time for this project.
5. Arrive at the project guidelines. Define ground rules for the project.
6. Document the various steps that need to be executed in order to meet the project objective. Discuss the various methods in which these steps can be executed.
7. Evaluate each method and select the best method.
8. Reasons for selecting a method need to be given.
9. Determine which planning activities would be necessary for the project.
10. Identify dependencies that exist for the project.
11. Define a conflict resolution process for the project.

**Outputs:**

Project Approach Document

## Project Approach—Guidelines

Virtually every project needs to have a defined approach, however the degree of formality depends on the size and complexity of the project. Without some description of a Project Approach, it is difficult to plan the activities and results of the project. A defined life cycle helps to ensure relevance of work being done and continuity of the results of that work. The best method in which the project can be executed is chosen. Relevant planning elements for the project are determined. A team meeting is the best way to agree upon the Project Approach.

### 1. Project Life Cycle

- a. Phases: How are the project activities grouped and sequenced? Will the regular project life cycle hold good for this project or will the life cycle be tailored for this project?
- b. Testing: How does each phase contribute to testing of project results?
- c. Reviews: What kinds of reviews are needed for results of each phase? Who needs to participate in the reviews?

An example is given below:

Phase	Major Deliverables	Testing	Walkthrough/Review
Requirements Analysis	Outputs: Customer Specifications, Project Overview Statement Inputs: Customer requirements Rules: The technical lead needs to accompany the Project Manager for the specifications discussion with the customer. Dependencies: Storyboard needs to be sent by the customer.	Acceptance Test Plan	Specifications Document to be reviewed by the Stakeholders and the Development Team
Planning	Outputs: Integrated Project Plan Inputs: Specifications document, Approved Project Request. Rules: All task durations need to be validated by the project reviewer. Dependencies: 1.The specifications document needs to be signed off. 2. Standards to arrive from Dept A	Test cases	Plan review by relevant stakeholders
Production	Outputs: Components of product Inputs: Plans, specifications. Rules: If there is schedule slippage, the resource needs to	System Test Plan	Peer code review by team members Content review by Project Manager

	inform the Project Manager as soon as s/he becomes aware of the delay. Dependencies: Component A and B should be complete before work on Component C starts.		
Testing	Outputs: Defect reports Inputs: Product, Test cases, Test Plans Rules: All defects to be rectified within 2 days of capturing the defect. Dependencies: All defects to be corrected before second round of testing.	Defect Reports	Test cases to be reviewed by the Project Manager.

2. Similar project life cycles: Check to see if there have been any other projects, which followed a similar life cycle.
3. Reusable components: Speak with team members, project reviewers, the operating unit head and determine if any code, hardware, or any other element can be reused in this project. e.g. the code for Functionality X used in Project A can be reused for Functionality X in this project, or e.g. The work breakdown structure for Project B can be used as a work breakdown structure template for this project.
4. Project guidelines: Guidelines and ground rules can be defined and agreed upon. e.g. The customer will review each module when its ready. or e.g. Production of a module will begin once the customer approves the storyboard of a module.
5. Methods: Discuss various approach options that can be used in order to meet the project objective. Evaluate the various methods and choose the best one.
6. Justification: The reason for choosing a certain method should be given. e.g. a. Cost vs. Benefits: A blended training method was agreed upon because only classroom training is likely to put a strain on the budget. Blended training has worked well in the past. b. Risks: The risks in this option are lower because we have expertise in using this version of Macromedia Flash.
7. Discuss with the team which of the planning activities are required. The various risks, the complexity of the project, and the customer should be kept in mind while deciding which planning activities are required.
  - a. Work Planning
  - b. Risk Management Planning
  - c. Communications Planning
  - d. Quality Assurance Planning
  - e. Resources Planning
  - f. Procurement Planning
  - g. Operational Transfer Planning

8. Dependencies: Any dependencies outside of the Project Manager's direct control, or outside of the scope of the project (but which may still influence the project success) should be identified. e.g. We will be able to start work on Project A only when Dept. X has tested their Project B successfully.
9. Define a conflict resolution process. This ensures that at the time of conflict, team members learn to resolve it effectively between themselves and escalate the conflict only, if necessary.