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SMARt COmmunities Skills Development in Europe

Project Management

Unit 1
Foundations of Project Management:
Concepts, Lifecycle, and Stakeholders

Cefriel
POLITECNICO DI MILANO

Project Management Module Aims

- Provide a comprehensive overview of project planning, with a focus on scope, requirements, scheduling, and resource management

- Enable participants to understand and apply techniques for defining, decomposing, and estimating project work

- Emphasize the importance of clear requirements and effective communication in project planning

- Equip participants with tools and techniques for monitoring, controlling, and managing project performance

- Introduce risk management principles and processes

- Present Agile project management fundamentals, focusing on the Scrum framework

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Unit 1 Contents

- Definition and characteristics of a **project**

- Distinctive **elements of projects** (temporariness, uniqueness, progressive elaboration)

- **Business value** in projects

- Differences between **project, program, and portfolio**

- Project management vs program management vs portfolio management

- Project management **process** groups

- **Project lifecycle**: phases, activities, deliverables, decision gates

- **Tools** for sharing **project vision and agreements** (project charter, vision statement)

- **Stakeholder identification and analysis** (analysis and engagement matrices)

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What is a Project?
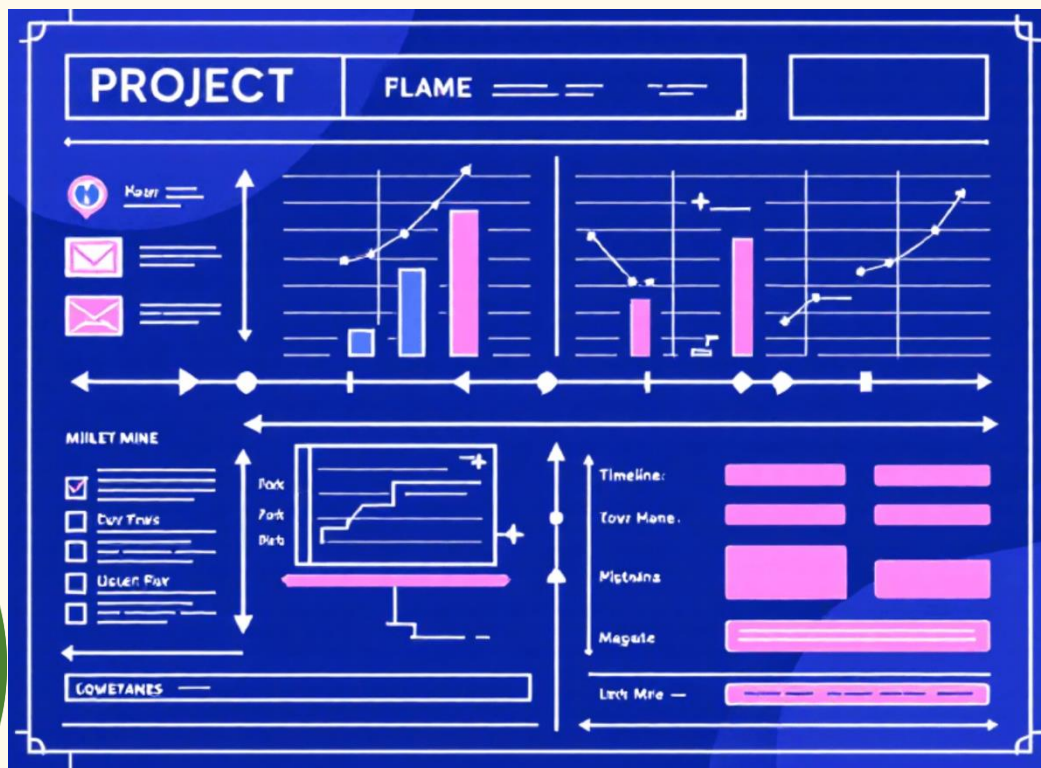
A project represents a focused initiative with defined boundaries: it has a specific duration, clear goals, and a targeted timeline. Projects mobilize diverse resources, people, technology, budget to produce a distinct – measurable outcome that addresses a particular business need or opportunity.

> "A project is a temporary endeavor undertaken to create a unique product, service, or result."

Three Defining Elements of Projects

Temporariness

Projects have definite start and end dates.
This temporary nature extends to the context—the specific business need, market condition, or team composition that initiated the project.

Uniqueness

Every project creates something distinctive.
Whether it's a product, service, research outcome, or process improvement, each project delivers results that haven't existed in exactly this form before.

Progressive Elaboration

Projects develop iteratively through continuous refinement.
As work progresses, details become clearer, plans sharpen, and the path to the final result grows more defined.

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Understanding Business Value

> "Business value in projects refers to the benefit that the results of a specific project provide to its stakeholders."

Business value represents the net quantifiable benefit derived from a project endeavor. It encompasses both tangible returns—like cost savings, revenue growth, or time efficiency—and intangible benefits such as brand reputation, customer satisfaction, or employee morale.

Understanding and maximizing business value is the ultimate goal of effective project management. Every project decision should tie back to delivering meaningful value to stakeholders.

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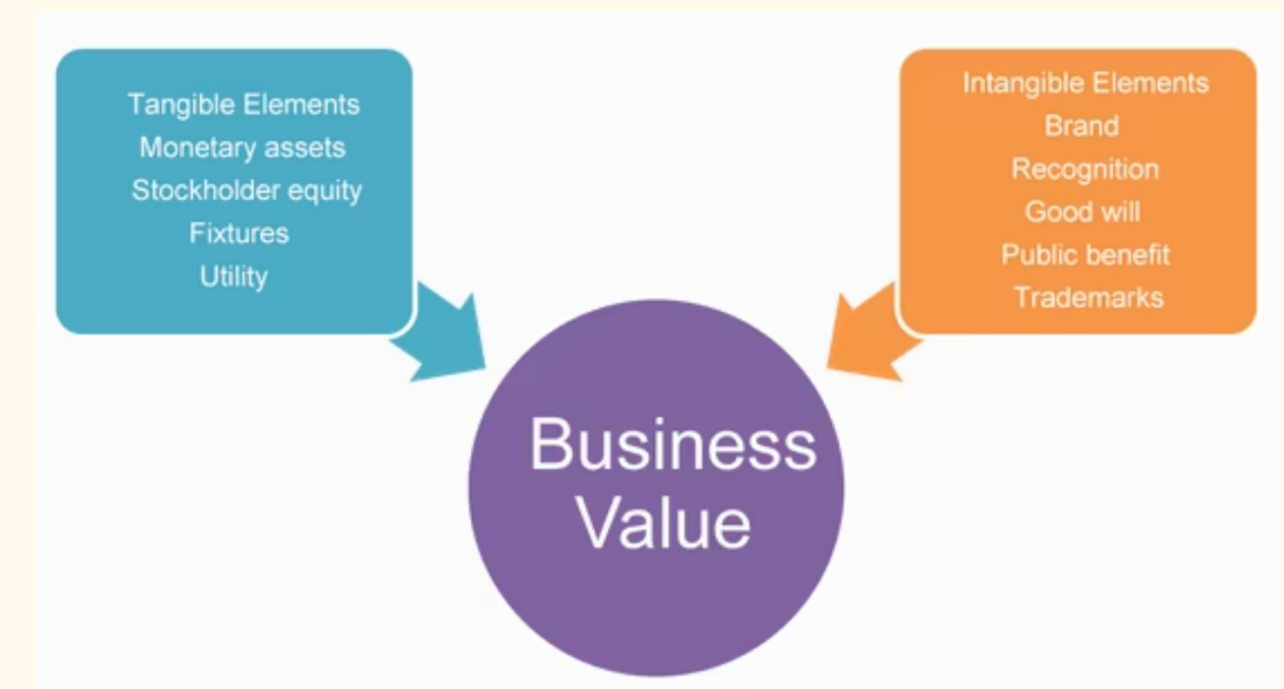
Program & Portfolio Definition

Program

A group of related projects, sub-programs, and program activities managed in a coordinated manner to obtain benefits not available from managing them individually.

Programs focus on achieving strategic benefits through synchronized execution of interconnected projects that share common goals or resources.

Portfolio

A collection of projects, programs, sub-portfolios, and operations managed as a group to achieve strategic organizational objectives.

Portfolios align with business strategy, balancing investments across initiatives to maximize overall organizational value and competitive advantage.

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Program & Portfolio Definition

Project Management

Doing the project right

The application of knowledge, skills, tools, and techniques to project activities to meet requirements.
This involves integrating and executing the 49 PM processes defined by PMI to deliver specific outcomes on time and within budget.

Program Management

Doing the projects right

The coordinated management of related projects to obtain benefits and control not available from managing them individually.
Programs emphasize managing interdependencies
and synergies across multiple initiatives.

Portfolio Management

Doing the right projects and programs

The centralized management of one or more portfolios to achieve strategic objectives. Portfolio management ensures organizational resources are invested in initiatives that best support long-term strategic goals.

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Process Groups

Project management work is organized into five distinct process groups that provides a structured framework for project execution from start to finish.

Initiating
Defining and formally authorizing a new project or project phase.
Establishing the foundation and securing stakeholder commitment.

Planning
Refining objectives and defining the course of action required to achieve project goals.
Creating detailed roadmaps for execution.

Executing
Integrating people and resources to carry out the project management plan.
Turning plans into reality through coordinated action.

Monitoring & Controlling
Tracking progress, identifying variances, and implementing corrective actions.
Ensuring the project stays on course.

Closing
Formalizing acceptance of deliverables and bringing the project or phase to an orderly conclusion.
Capturing lessons learned.

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Project's Lifecycle Flow

Projects progress through overlapping process groups, with activity levels varying throughout the lifecycle. This visualization shows how effort and focus shift as a project moves from initiation to closure.

Notice how planning effort peaks early, execution dominates the middle phases, and monitoring occurs continuously throughout. Understanding this flow helps project managers allocate resources and attention appropriately at each stage.
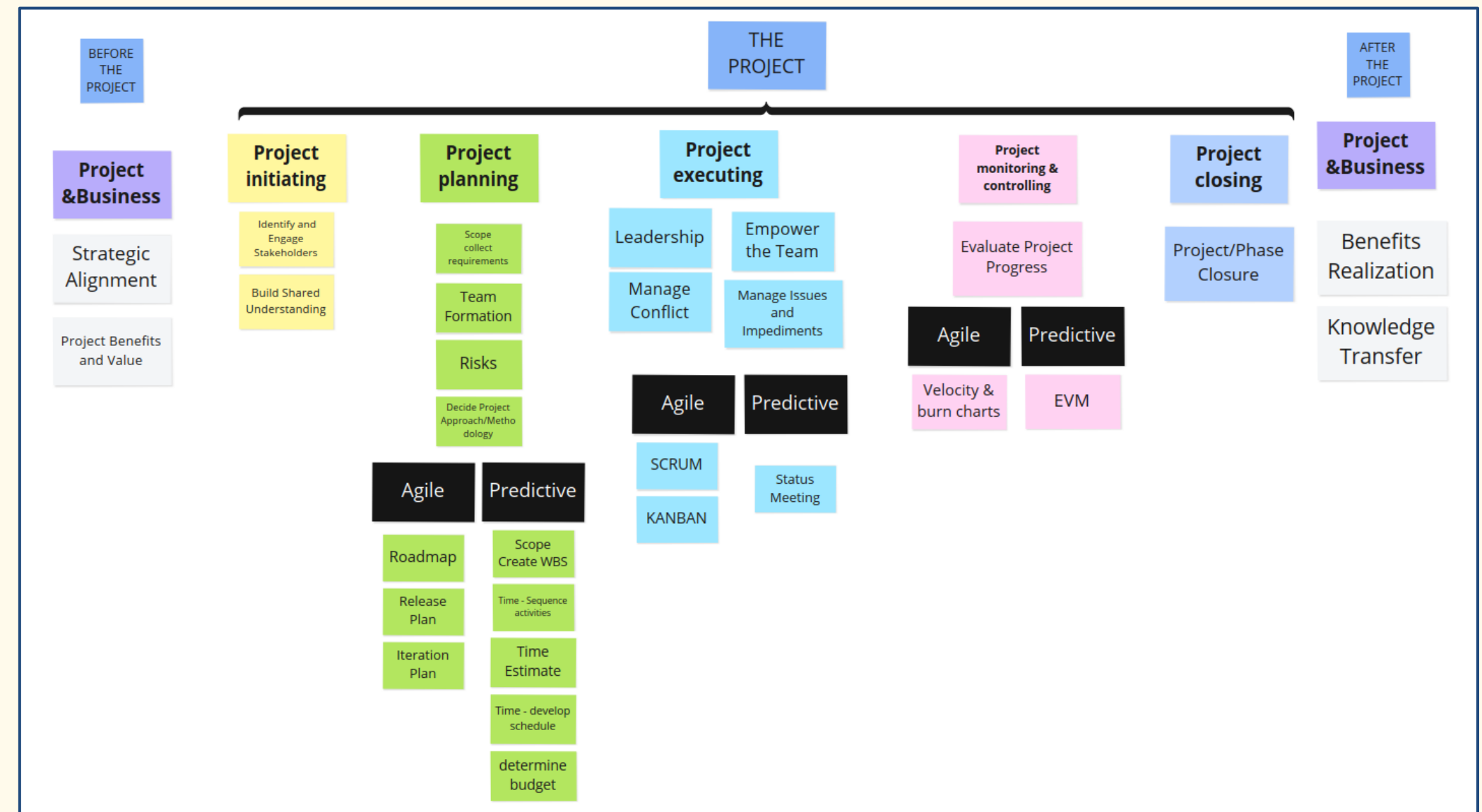
Aligning Projects with Strategy

Organizational Project Management

Organizational Project Management (OPM) serves as the strategic execution framework that bridges the gap between high-level business strategy and day-to-day project delivery.
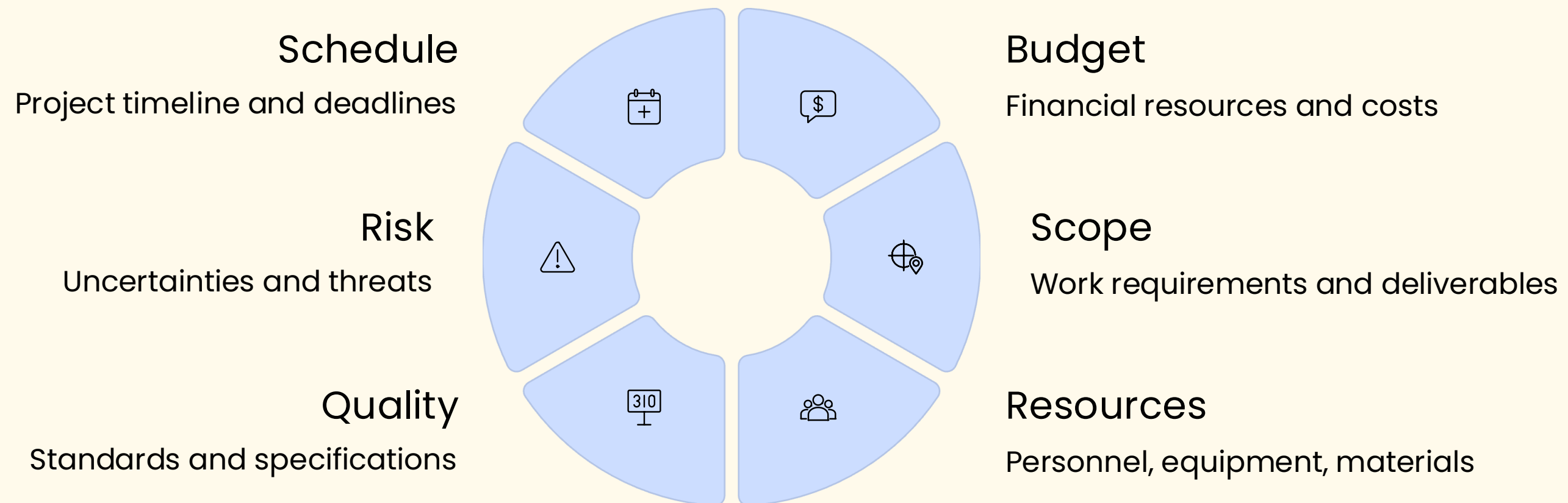
OPM ensures that:

- Projects align with strategic business objectives
- Resources are optimized across the portfolio
- Capabilities are developed systematically
- Value delivery is maximized

This framework transforms strategy into action, ensuring every project contributes meaningfully to organizational success.

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Managing Project Constraints

Every project operates within an interconnected system of constraints. When one element changes, it creates a ripple effect—at least one other constraint must adjust to maintain project balance.

Schedule
Project timeline and deadlines

Budget
Financial resources and costs

Risk
Uncertainties and threats

Scope
Work requirements and deliverables

Quality
Standards and specifications

Resources
Personnel, equipment, materials

Skilled project managers understand these interdependencies and make informed trade-offs. Success requires balancing competing demands while keeping stakeholders aligned on priorities and expectations.

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Understanding the Project Lifecycle

The project lifecycle represents the journey from initial concept to final delivery. It's a structured framework that connects the beginning of a project to its successful conclusion, providing clear milestones and decision points along the way.

Here is a breakdown of the typical phases in a project lifecycle:

Phase	Key Activities	Deliverables	Decision Gates
Initiation	Define project objectives and scope, identify stakeholders, conduct feasibility study, create project charter.	Project Charter, Stakeholder Register, Business Case, Feasibility Report.	Go/No-Go Decision, Project Approval.
Planning	Develop project plan, define tasks and timelines, allocate resources, create budget, risk assessment.	Project Management Plan, Work Breakdown Structure (WBS), Schedule, Budget, Risk Management Plan.	Plan Approval, Resource Allocation Approval.
Execution	Implement tasks, manage resources, communicate progress, quality assurance, procure materials.	Product Deliverables, Status Reports, Change Requests, Quality Reports.	Deliverable Acceptance, Performance Reviews.
Monitoring & Control	Track progress, manage changes, monitor risks, measure performance against plan, report status.	Performance Reports, Updated Risk Register, Change Log, Forecasts.	Variance Analysis, Change Control Approval.
Closure	Finalize all activities, obtain formal acceptance, release resources, conduct post-project review, document lessons learned.	Final Project Report, Lessons Learned Document, Contract Closure, Formal Sign-off.	Project Completion Approval, Lessons Learned Acceptance.

What Defines Each Phase

Every phase in the lifecycle is characterized by a homogeneous grouping of activities, specific deliverables, defined roles and responsibilities, and critical decision-making moments called "gates" that determine if the project should proceed to the next phase.

Flexible Structure

The specific structure of a project lifecycle depends on your organization and the nature of the work. Phases can be executed sequentially for traditional projects or with overlapping activities for more agile approaches.

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Building Shared Understanding

01 Share Project Agreements

Distribute the vision statement and project charter with all stakeholders and team members to establish a common foundation of understanding.

02 Negotiate and Align

Work with stakeholders to agree on project agreements, and with the team to clarify roles, responsibilities, priorities, and assignments until everyone achieves "buy-in."

03 Uphold Commitments

Maintain and reinforce these agreements throughout the entire project lifecycle to ensure consistency and accountability.

04 Launch with Kickoff

Conduct kickoff meetings to formally begin the project, energize the team, and confirm everyone's understanding of objectives and expectations.

Essential Tools

- Project vision statement or board
- Project charter document

Required Inputs

- Business case analysis
- Identified business needs

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Product Vision Canvas

The Product Vision Canvas is a strategic tool that helps teams articulate and align on what they're building and why it matters. It creates a shared understanding of the product's purpose, target audience, and value proposition.

Product Slogan

Summarize in one compelling sentence the essence of what your product represents and delivers.

Target Audience

Who is the product designed for? Define the specific market segment, users, and customers who will benefit most.

Needs Satisfied

What problems does the product solve? How does it create value? What emotions does it evoke in users?

Main Features

Identify the three to five core features that make your product unique and valuable in the marketplace.

Company Value

Articulate how the product creates value for your organization beyond just serving customers.

Exclusions & Impediments

Define who the product is NOT for and identify potential obstacles that could limit value creation or user adoption.

Project Charter: Your Foundation for Success

The project charter is the formal document that authorizes your project's existence and gives you the authority to apply organizational resources to project activities. It's your official green light to proceed.

Authorization
Formally recognizes the existence of a new project or authorizes an existing project to move into its next phase.

Business Drivers
Projects are initiated in response to market demand, business needs, customer requirements, or strategic opportunities.

Key Components
Includes formal recognition, project manager identification, business and product descriptions, and defined design constraints.

Constraints
Establishes critical boundaries including budget, timeline, scope, and resources that will influence all subsequent project processes.

Pro Tip: The project charter empowers the project manager with the authority to make decisions and allocate resources.
Without it, you're operating without official backing.

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Visual Project Charter

A visual project charter transforms complex project information into an accessible, engaging format that stakeholders can quickly understand and reference. It serves as a living document that keeps everyone aligned.

1

Clear Visual Hierarchy
Organize information so the most critical elements—purpose, objectives, and success criteria—stand out immediately.

2

Stakeholder-Friendly Format
Use visual elements, icons, and color coding to make the charter accessible to both technical and non-technical audiences.

3

Quick Reference Tool
Design the charter as a one-page reference that team members can easily consult throughout the project lifecycle.

4

Living Document
Update the visual charter as the project evolves, ensuring it remains relevant and useful for decision-making.

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Understanding Project Stakeholders

Stakeholders are individuals or organizations whose interests are affected by your project—and who can significantly influence its success. Identifying and managing these relationships is critical to achieving your project objectives.

Understanding stakeholder roles and influence is essential to project success. They can make or break your outcomes.

Key Stakeholder Categories

Sponsor

Provides resources, support and serves as the escalation path for critical decisions.

Customers & Users

Those who will acquire and use the project's outcome — their needs drive requirements.

Partners & Vendors

External companies providing components, specialized expertise, and support services.

Internal Groups

Functional managers, organizational groups, and departments affected by project activities.

Remember: Stakeholders can influence your project positively or negatively. Early identification and engagement is your best strategy for success.

Stakeholder Identification Process

Systematically identifying stakeholders and understanding their interests, involvement, and potential impact is crucial for project success. The earlier you do this, the better positioned you'll be to manage expectations and build support.

Identify
Find all people and organizations impacted by or able to impact the project.

Document
Record identification information including names, roles, positions, and contact details.

Assess
Evaluate key requirements, expectations, and when they'll be most involved in the project.

Strategize
Develop management approaches based on their classification and influence level.

The Stakeholder Register

Core Information

- Identification details and contacts
- Key requirements and expectations
- Primary project phases of involvement

Classification Framework

- Internal vs. external positioning
- Supporter, neutral, or resistor status
- Tailored management strategy

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Stakeholder Analysis Matrix

The power-interest grid is a practical tool for prioritizing stakeholder engagement based on their influence over the project and their level of interest in its outcomes. This helps you allocate your limited time and resources effectively.

Manage Closely

High Power, High Interest: Key players who require your focused attention. Involve them in governance, decision-making bodies, and consult regularly.

Keep Satisfied

High Power, Low Interest: Engage and consult on their areas of interest. Work to increase their engagement and move them toward active participation.

Keep Informed

Low Power, High Interest: Leverage their interest through involvement in low-risk areas. They can become valuable supporters and ambassadors for your project.

Monitor

Low Power, Low Interest: Keep them informed through general communications like newsletters and websites. Minimal effort but maintain awareness.

Strategic Tip: Stakeholder positions aren't static. Your goal is often to move stakeholders toward higher interest and engagement, particularly into the "Manage Closely" quadrant.

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Stakeholder Engagement Matrix

This powerful tool helps you assess where your stakeholders currently stand and where you need them to be for project success. It creates a roadmap for your engagement strategy by identifying gaps between current and desired states.

Unaware
Stakeholders who don't know about the project or its potential impacts on their interests.

Resistant
Aware of the project but actively resistant to change or opposed to project outcomes.

Neutral
Aware of the project but neither actively supportive nor resistant—sitting on the fence.

Supportive
Aware of the project and expressing support for change and project objectives

Leading
Aware and proactively engaged in ensuring the project succeeds - your champions.

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
Project Sponsor	C: D:	C: D:	C: D:	C: D:	C: D:
Team Lead	C: D:	C: D:	C: D:	C: D:	C: D:
End Users	C: D:	C: D:	C: D:	C: D:	C: D:
IT Department	C: D:	C: D:	C: D:	C: D:	C: D:
Finance	C: D:	C: D:	C: D:	C: D:	C: D:
Other Stakeholder	C: D:	C: D:	C: D:	C: D:	C: D:

How to Use This Matrix

C = Current: Mark where each stakeholder is today in their engagement level.
D = Desired: Indicate where you need them to be for project success.

The gap between C and D reveals the work needed. Your stakeholder engagement plan should focus on closing these gaps through targeted communication, involvement, and relationship-building strategies.
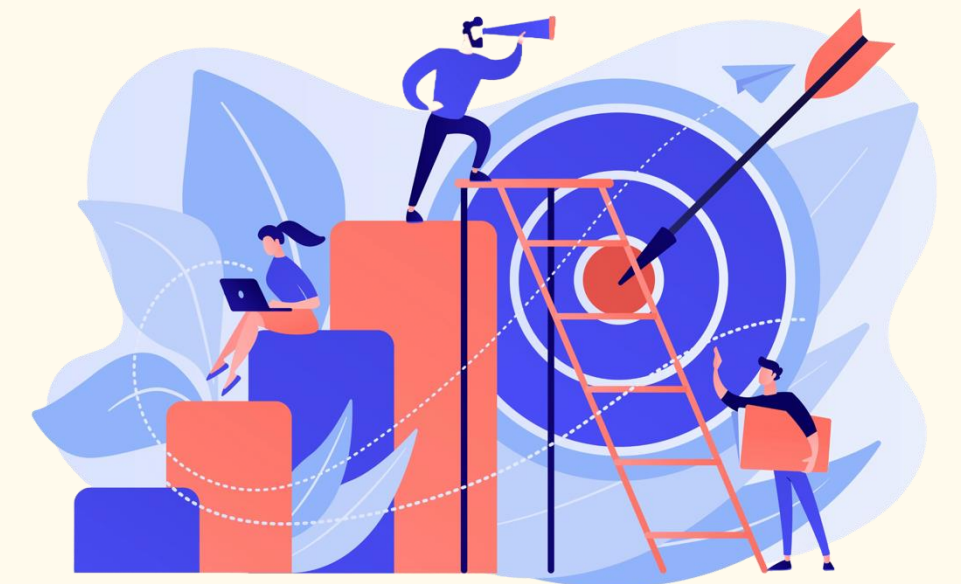
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Unit Completed – What's Next?

To consolidate your learning and reflect on the key concepts covered, please take a moment to complete this quiz.

Your feedback and results will help you track your progress and support continuous improvement of the training experience.

Click the link to begin the quiz!

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www.smarco.eu

info@smarco.eu

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