Collaborating on Project Support Items

🔖 Project IQ, Work IQ   👤 Project Manager, Team Member

Instructions: Use this lab work sheet to complete a set of short and meaningful tasks at your own time and pace to complement your formal learning of senseiIQ™ in the classroom. While the examples used herein may be different from (or not available) in your organization's senseiIQ™ instance, you can populate the system with your own data and follow the exercises. Ensure that you are already an enabled user in the **Sensei.IQ for Project** application.

Please note the Job Aid for Collaborating on Project Artefacts within Learning IQ compliments the following lab sets, each of which contains two sets of data; Set A and Set B.

Lab Exercise 1.   Manage Project Issues
Lab Exercise 2.   Manage Project Risks
Lab Exercise 3.   Track Project Decisions
Lab Exercise 4.   Record and Manage Change Requests
Lab Exercise 5.   Capture Lessons Learned

1. Manage Project Issues

Set A

Name	Not All Executives Available
Description	Many of the executive staff may take vacations during the time we will need them to review the benefits package.
Assigned to	Select from the list 🔍
Category	Schedule
Status	Active
Priority	Medium
Due Date	Select the date from the date picker 📅
Progress Update	[Leave it blank, or supply your own text]
Name	No Budget for New Product Development
Description	New product development was not included in the proposed budget for this financial year and there are no funds available.
Assigned To	Select from the list 🔍
Status	Active
Category	Other
Priority	High
Due Date	Select the date from the date picker 📅
Resolution	Review the budget to see where funds can be acquired

Set B

Name	Legal Review
Description	Legal review of the forms, agreements, policies, and procedures will be delayed by four weeks based on other priorities
Assigned to	Select from the list 🔍
Category	Business Process
Status	Active

Priority   Medium

Due Date   Select the date from the date picker 📅

Progress Update   [Leave it blank, or supply your own text]

Name   Equipment Backorder

Description   The recycle bins ordered for each location/department are currently on backorder with no solid date provided for delivery

Assigned To   Select from the list 🔍

Status   Active

Category   Vendor

Priority   High

Due Date   Select the date from the date picker 📅

Resolution   All suppliers have been checked for availability and there are none in stock at this time. We may need to change the product we are ordering. The team is reviewing.

2. Manage Project Risks

Set A

Name	Exceed Hardware Budget
Description	Technology price changes during the effort
Assigned to	Select from the list 🔍
Category	Resource
Status	Active
Likelihood	Possible
Consequence	Major
Cost	$150,000
Due Date	Select the date from the date picker 📅
Mitigation Plan	Request additional funding
Contingency Plan	Reduce the number of employees being upgraded
Trigger Description	Quarterly financial reports
Trigger	Exposure over threshold
Name	Lose Customers
Description	Potential lost revenue
Assigned To	Select from the list 🔍
Category	Other
Status	Active
Likelihood	Unlikely
Consequence	Major
Cost	$1,000,000
Due Date	Select the date from the date picker 📅
Mitigation Plan	Implement customer success role
Contingency Plan	Personal CEO contact with every customer on the edge

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Trigger Description	Complaints to sales; low satisfaction survey scores
Trigger	Other

Set B

Name	Skilled Developers
Description	We need experienced mobile app developers to be onboarded by the end of May to stay on target
Assigned to	Select from the list 🔍
Category	Resource
Status	Active
Likelihood	Likely
Consequence	Severe
Cost	$200,000
Due Date	Select the date from the date picker 📅
Mitigation Plan	Publish job openings by 24/4/[current year]
Contingency Plan	Reach out to recruiting partners for temporary/contract resources
Trigger Description	Poor response to job posing assessed by 1/5/[current year]
Trigger	Date
Name	Additional Scope
Description	Added development to accommodate multiple mobile device platforms
Assigned To	Select from the list 🔍
Status	Active
Category	Scope
Likelihood	Possible
Consequence	Moderate
Cost	$150,000
Due Date	Select the date from the date picker 📅

Mitigation Plan	Evaluate the requirements and if possible, include them in the final design before development begins
Contingency Plan	Propose a phased deployment by platform
Trigger Description	Request for additional scope from the business
Trigger	Other

Mitigation Plan   Evaluate the requirements and if possible, include them in the final design before development begins

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3. Track Project Decisions

Set A

Name	Resource Pool
Description	Will we use internal or external resources for this program?
Assigned to	Select from the list 🔍
Category	Resource
Status	Active
Priority	High
Escalation Required	Yes
Escalation Manager	Select from the list 🔍
Due Date	Select the date from the date picker 📅
Decision Date	Select the date from the date picker 📅
Approver	Select from the list 🔍
Assigned To	Select from the list 🔍
Name	Focus Groups
Description	Decide to hold Focus Group meetings
Assigned To	Select from the list 🔍
Category	Business Process
Status	Active
Priority	Medium
Escalation Required	No
Escalation Manager	Select from the list 🔍
Due Date	Select the date from the date picker 📅
Decision Date	Select the date from the date picker 📅

Approver	Select from the list 🔍
Assigned To	Select from the list 🔍

Set B

Name	Development Approach
Description	Will we manage the development internally, outsource, or coordinate with platform providers?
Assigned to	Select from the list 🔍
Category	Resource
Status	Active
Priority	High
Escalation Required	Yes
Escalation Manager	Select from the list 🔍
Due Date	Select the date from the date picker 📅
Decision Date	Select the date from the date picker 📅
Approver	Select from the list 🔍
Assigned To	Select from the list 🔍

Name	Change Control Board
Description	Establish a change control board once design approved and development begins
Assigned To	Select from the list 🔍
Category	Scope
Status	Active
Priority	High
Escalation Required	No
Escalation Manager	Select from the list 🔍

Due Date	Select the date from the date picker 🗓
Decision Date	Select the date from the date picker 🗓
Approver	Select from the list 🔍
Assigned To	Select from the list 🔍

4. Record and Manage Change Requests

Set A

Name	Replacement Application
Description	We need to replace the old application instead of upgrading it or migrating it.
Driven By	Business, IT, Vendor
Implementation Date	Select the date from the date picker 📅
Category	Resource
Priority	High
Assigned To	Select from the list 🔍
Work Effort Estimate	54,000
Work Effort Details	This effort will require IT and business resources for about six months
Cost Estimate	$351,000
Cost Estimate Details	Hours times a blended rate of $65
Duration Estimate	200
Duration Estimate Details	About six months
Resource Impacts	Approximately 100 resources across the company
Impacts on Other Projects	There will be other projects delayed as this is the number one priority
Assumptions	All resources will be made available when needed to keep this effort on track
Approved/Rejected By	Select from the list 🔍
Approved/Rejected Date	Select the date from the date picker 📅
Due Date	Select the date from the date picker 📅
Status	Submitted

Set B

Name	Additional Budget
Description	The funding required was underestimated. We have requested additional funding
Driven By	Business, Vendor
Implementation Date	Select the date from the date picker 🗓
Category	Resource
Priority	High
Assigned To	Select from the list 🔍
Work Effort Estimate	8
Work Effort Details	Revised budget and request
Cost Estimate	$3,600
Cost Estimate Details	Three participants to define and produce the request
Duration Estimate	1
Duration Estimate Details	Product CR for approval
Resource Impacts	One resource
Impacts on Other Projects	None
Assumptions	Budget request will get approved
Approved/Rejected By	Select from the list 🔍
Approved/Rejected Date	Select the date from the date picker 🗓
Due Date	Select the date from the date picker 🗓
Status	Approved

5. Capture Lessons Learned

Set A

Name	Maintain centralized location for all policies/procedures
Category	Business Process
Observation	Documentation was stored in multiple places making it difficult to find and time consuming to gather
Recommendation	Create a centralized document library
Lesson Learned	Having a centralized document library will make it easier and more efficient to maintain policies/procedures as they change
Action Taken	Share with leadership team and requested to lead the effort

Name	Employee Engagement
Category	Resource
Observation	Employees needed to have more input earlier in the process
Recommendation	Employees should have received a survey for their input prior to getting started
Lessons Learned	Engaging the employees earlier on would have made the implementation much smoother, it would have provided key details needed well in advance.
Action Taken	Worked with HR and Marketing to craft a survey for future use.

Name	Participation in Survey
Category	Stakeholder Engagement
Observation	Participation in surveys is usually not very good
Recommendation	Offer gifts for filling out survey
Lesson Learned	Staff is more likely to participate if there is something in it for them
Action Taken	Offered gift cards to participants

Set B

Name	Engage Security and Compliance Team Early On
Category	Resource
Observation	Security and compliance team was brought in after initial conversations with vendors

Recommendation	Add a representative from the security and compliance team to the project stakeholder team and make sure they engage at the very beginning
Lesson Learned	All security and compliance requirements need to be documented and understood from the beginning
Action Taken	Updated stakeholder template to include security and compliance, shared the template with the team, and share the update with leadership
Name	Budget
Category	Resource
Observation	Planning for this program was not completed in time to make it into the financial year budget which impacted other planned programs
Recommendation	Ensure that all teams are aware of the budget planning cycle
Lessons Learned	Projects not budgeted for can still be done, however it is important to plan appropriately
Action Taken	N/A
Name	Open Lines of Communication
Category	Business Process
Observation	Everyone on the team freely shares information which is keeping us on target
Recommendation	N/A
Lesson Learned	The team can move faster when everyone keeps open lines of communication
Action Taken	Recognized the team and made this point to everyone so they could understand the full impact of keeping each informed