

PROJECT MANAGEMENT - A PRACTICUM



Sukhjit Singh
De Anza College

Project Management - A Practicum

Info Page

This text is disseminated via the Open Education Resource (OER) LibreTexts Project (<https://LibreTexts.org>) and like the thousands of other texts available within this powerful platform, it is freely available for reading, printing, and "consuming."

The LibreTexts mission is to bring together students, faculty, and scholars in a collaborative effort to provide an accessible, and comprehensive platform that empowers our community to develop, curate, adapt, and adopt openly licensed resources and technologies; through these efforts we can reduce the financial burden borne from traditional educational resource costs, ensuring education is more accessible for students and communities worldwide.

Most, but not all, pages in the library have licenses that may allow individuals to make changes, save, and print this book. Carefully consult the applicable license(s) before pursuing such effects. Instructors can adopt existing LibreTexts texts or Remix them to quickly build course-specific resources to meet the needs of their students. Unlike traditional textbooks, LibreTexts' web based origins allow powerful integration of advanced features and new technologies to support learning.



LibreTexts is the adaptable, user-friendly non-profit open education resource platform that educators trust for creating, customizing, and sharing accessible, interactive textbooks, adaptive homework, and ancillary materials. We collaborate with individuals and organizations to champion open education initiatives, support institutional publishing programs, drive curriculum development projects, and more.

The LibreTexts libraries are Powered by [NICE CXone Expert](#) and were supported by the Department of Education Open Textbook Pilot Project, the California Education Learning Lab, the UC Davis Office of the Provost, the UC Davis Library, the California State University Affordable Learning Solutions Program, and Merlot. This material is based upon work supported by the National Science Foundation under Grant No. 1246120, 1525057, and 1413739.

Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation nor the US Department of Education.

Have questions or comments? For information about adoptions or adaptations contact info@LibreTexts.org or visit our main website at <https://LibreTexts.org>.

The LibreTexts name, logo, and book covers are trademarked by LibreTexts, Inc. (a 501(c)(3) not-for-profit organization) and protected against unauthorized use.

This text was compiled on 09/10/2026

This page titled [Info Page](#) is shared under a [Public Domain](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

TABLE OF CONTENTS

Project Management - A Practicum

Info Page

Program Page

Accessibility Statement

AI Use

About the Book

Welcome Letter

How to use this book?

How was this book created?

Motivational Message for the first day of class.

Meet the Author

Licensing

1: Foundations of Project Management

1.1: Preface

1.2: How to Use This Book

1.3: Overview

1.4: Problem Based Learning

1.5: Your Role

1.6: Tools And Resources

1.7: Grading and Assessment Overview

1.8: Collaboration and Integrity

1.9: Problem Based Student Guide

1.10: Overview of C-Bay

1.11: Forming Teams for the Practicum

2: Chapter 0 - Role of PM

2.1: Welcome to the Role of PM (The Setup)

2.2: Plan of Attack

2.3: Learning Resources

2.4: What You Will Submit

2.5: Reflection and Debrief

2.6: Submission Checklist

2.7: Instructor Notes / Evaluation Criteria

3: Chapter 1 - Project Initiation

3.1: Scenario Brief

3.2: Plan of Attack

3.3: What You Will Submit

- 3.4: Reflection Questions and Lessons Learned
- 3.5: Submission Checklist and Final Assembly
- 3.6: Instructor Notes / Evaluation Criteria
- 3.7: Transition
- 3.8: Resource Guide for Student Success

4: Chapter 2 - Defining Scope and Success

- 4.1: Scenario Brief
- 4.2: Plan of Attack
- 4.3: What You Will Submit
- 4.4: Reflection Questions and Lessons Learned
- 4.5: Submission Checklist and Final Assembly
- 4.6: Instructor Notes / Evaluation Criteria
- 4.7: Transition
- 4.8: Resource Guide for Student Success

5: Chapter 3- Estimating Schedule, Costs and Building the Budget

- 5.1: Scenario Brief
- 5.2: Plan of Attack
- 5.3: What You Will Submit
- 5.4: Reflection Questions and Lessons Learned
- 5.5: Submission Checklist and Final Assembly
- 5.6: Submission Checklist and Final Assembly
- 5.7: Transition
- 5.8: Resource Guide for Student Success

6: Chapter 4 – Identifying Risks and Planning for Change

- 6.1: Scenario Brief
- 6.2: Plan of Attack
- 6.3: What You Will Submit
- 6.4: Reflection Questions and Lessons Learned
- 6.5: Submission Checklist and Final Assembly
- 6.6: Instructor Notes / Evaluation Criteria
- 6.7: Transition
- 6.8: Resource Guide for Student Success

7: Chapter 5 - Project Execution

- 7.1: Scenario Brief
- 7.2: Plan of Attack
- 7.3: What You Will Submit and Memo Sequence
- 7.4: Reflection Questions and Lessons Learned
- 7.5: Submission Checklist and Final Assembly
- 7.6: Instructor Notes / Evaluation Criteria

7.7: Transition

7.8: Resource Guide for Student Success

8: Chapter 6 - Closing the Project and Capturing Lessons

8.1: Scenario Brief

8.2: Plan of Attack

8.3: What You Will Submit

8.4: Reflection Questions and Lessons Learned

8.5: Submission Checklist and Final Assembly

8.6: Instructor Notes / Evaluation Criteria

8.7: Instructor Notes / Evaluation Criteria

8.8: Closing letter

8.9: Resource Guide for Student Success

Index

Glossary

Detailed Licensing

Program Page



De Anza College sits in the heart of Silicon Valley, where innovation and opportunity are part of daily life, and also has one of the highest costs of living in the country. For our students, that makes every dollar count, and the price of a textbook can be the difference between staying enrolled or dropping a class. Our Zero Textbook Cost (ZTC) program closes that gap by giving students full access to high-quality, faculty-created course materials at no cost from the first day of class.

De Anza is proud of its diverse student community, and we hold our ZTC materials to the same standard of excellence that defines the college. Faculty across departments write, adapt, and review these resources themselves, keeping them accurate, current, and grounded in the perspectives of the students who use them, with accessibility and inclusive design built in from the start.

This program reflects the time and care our faculty invest in their students. If you have questions, feedback, or come across any issues with a ZTC resource, contact De Anza College's ZTC Grants Coordinator, [Shagun Kaur](#).

Learn more about [De Anza ZTC Program](#) [www.deanza.edu/academic-services/oer/]

Note: The De Anza logo is a copyrighted trademark of De Anza College and may not be reproduced without permission.

Accessibility Statement

Accessibility

De Anza College is dedicated to creating learning materials that are accessible and benefit all students. Our materials follow the Web Content Accessibility Guidelines (WCAG) 2.1 Level AA. Our authors and contracted accessibility specialists checked all resources using this ASCCC OERI checklist, the accessibility tool in LibreTexts, WAVE, JAWS, and other more detailed checks for complex materials such as interactive components.

We selected LibreTexts as our preferred platform because of its [commitment to accessibility](#). In addition to the platform's inherent accessibility, we collaborated with the LibreTexts team to fix any accessibility issues we found.

Our Accessibility Review Process

Accessibility was built into the resource as it was written. This resource went through the following stages of review:

1. **Template check.** The project coordinator and instructional designers checked the first chapter for accessibility as a model to ensure later chapters meet accessibility standards.
2. **Progress checks.** The manuscript was checked at approximately 40%, 60%, and 80% completion to catch and correct accessibility issues in production.
3. **Specialist review.** Once the manuscript was complete, an accessibility expert conducted an accessibility check.
4. **Remediation.** The author and the project manager who conducted the earlier progress checks worked together to remediate the issues identified by the accessibility expert.
5. **Final check.** The resource underwent another full check by the accessibility expert before the book was deemed ready for publication.

This process combines ongoing checks during writing with a final specialist review, so issues are caught early and confirmed fixed before publication.

Report an Accessibility Problem

We are always looking for ways to make our resources more accessible. If you run into a barrier while using this resource, please let us know so we can look into it. When you [contact us](#), it helps to include:

- The name of the resource
- The location of the problem (a web address or page/chapter description)
- A description of the problem you encountered
- The device, browser, and any assistive technology you were using (e.g., Windows 11, Google Chrome, JAWS screen reader)

Contact us: [De Anza ZTC team](#)

This statement was last updated August 2026

This resource was project-managed by **Shagun Kaur**, overseeing scope, budget, and schedule; stakeholder coordination via monthly meetings; training and platform support (LibreTexts, troubleshooting, technical support); QA/accessibility check scheduling; and licensing and copyright governance.

A Note on Known Limitations

No accessibility check is perfect. We've made a genuine, sustained effort to catch and fix issues throughout the writing and review process described above, but some barriers may remain, especially in complex or interactive content. We'd rather be upfront about that than claim a standard of perfection we can't guarantee.

AI Use

The intellectual foundation, project-management concepts, instructional approach, scenarios, and overall design of *Project Management – A Practicum* were developed based on professional project-management experience, teaching practice, original instructional materials, and appropriately licensed Open Educational Resources (OER).

Generative artificial intelligence was used during the development and production of this book. Its use included drafting assistance, editing, instructional-material development, assessment support, organization, formatting, and selected media production. All final instructional and editorial decisions remained under human control.

AI Tools Used

The primary generative AI tool used in developing this book was **ChatGPT by OpenAI**. AI-assisted image-generation capabilities available through ChatGPT were also used for selected original illustrations and chapter graphics.

Specific model versions are not identified because the book was developed iteratively over time and the models available through the service changed during the development process.

How AI Was Used

Drafting and Instructional Development

The project-management concepts, learning objectives, professional context, project scenarios, instructional requirements, and pedagogical direction were established by the human author.

AI assisted with drafts of selected instructional materials, including:

- Scenario Briefs and project situations
- Plans of Attack and student instructions
- Explanations and examples
- Project-management templates and simulated professional artifacts
- Resource Guides for Student Success
- Reflection and lessons-learned questions
- Submission checklists
- Instructor notes and evaluation criteria
- Glossary and selected front- and back-matter content

AI-assisted drafts were not automatically incorporated into the book. They were reviewed, corrected, reorganized, substantially revised, expanded, shortened, or rejected as appropriate.

Editing and Organization

AI was used to improve clarity, readability, organization, transitions, terminology, consistency across chapters, student accessibility, and formatting of human-created and human-directed material.

Assessments and Learning Activities

AI assisted with drafting and refining selected scenario-based activities, worksheets, reflection questions, rubrics, and evaluation criteria. Learning outcomes, instructional purpose, expected student performance, and final assessment requirements were determined through human instructional judgment.

Project Simulations and Artifacts

AI assisted in developing and refining selected fictional project documents, communications, templates, and other artifacts used in the practicum. These materials were developed under human direction to simulate professional project-management practice and were reviewed for consistency with the instructional objectives and project storyline.

Media and Production

AI-assisted image-generation tools were used for selected original chapter illustrations, covers, and supporting graphics. AI also assisted with selected formatting and production tasks.

Representative Uses

Representative instructions provided to AI included requests to:

- develop a student-facing Plan of Attack from an established project scenario;
- improve an existing explanation while preserving its project-management meaning;
- develop instructional materials using provided project documents;
- refine student instructions for clarity and accessibility;
- create reflection questions aligned with a completed project activity;
- check materials for consistency with earlier chapters; and
- create illustrations representing project-management concepts.

These examples describe the general nature of AI assistance and are not an exhaustive record of individual interactions.

Guardrails and Human Review

The following guardrails were applied throughout development:

- AI was used with **author-created materials, materials for which permission was available, and appropriately licensed OER and other permitted resources.**
- AI-generated material was treated as **draft material or an editorial/production aid, not as an authoritative source.**
- AI-assisted instructional content was checked against professional project-management experience, subject-matter knowledge, instructional objectives, and underlying project materials.
- Factual and technical claims requiring verification were checked against appropriate sources before publication.
- AI-assisted material was substantially revised where necessary to correct inaccuracies, resolve inconsistencies, preserve instructional intent, and reflect professional judgment.
- AI was not used to process or disclose private student information in the creation of this book.
- Human review determined what AI-assisted material was accepted, modified, or rejected, and **final editorial control remained with the human author.**

The human author retains responsibility for the human-authored contributions, instructional design, subject-matter review, editorial decisions, and final published work.

About the Book

Project Management – A Practicum is a hands-on, scenario-driven learning experience designed to transform students from passive learners into active project leaders. Unlike traditional textbooks that focus on abstract theory, this book immerses students directly into the life of a real project—introducing issues, constraints, documents, and decisions that mirror professional environments.

This textbook is built around **C-Bay Inc.**, a fictional but highly realistic organization undertaking a series of scenarios. Through the project lifecycle—Initiation, Planning, Execution, and Closeout—students learn to navigate ambiguity, analyze real project artifacts, communicate with vendors, and make defensible management decisions.

Rather than teaching project management solely through definitions and frameworks, this book uses a **Problem-Based Learning (PBL)** approach enhanced by authentic artifacts. Students move beyond vocabulary and theory—into the mindset and responsibilities of project leadership.

Who This Book Is For

This OER textbook is designed for:

- College and university students learning project management
- New project managers seeking real-world practice
- Educators who want to teach through authentic, hands-on scenarios
- Professionals transitioning into PM roles
- Anyone who wants to build confidence in communication, analysis, and leadership

Whether you're studying project management for the first time or looking to strengthen your applied skills, this book gives you immersive, repeatable practice that builds professional competency.

What Makes This Book Different

1. A Complete End-to-End Project Simulation

You don't just "learn" about initiation, planning, execution, and closeout—you *experience* each one inside the NovaMed project.

2. Real-World Artifacts

Everything you work with is modeled after actual PMO documents used in industry.

3. Professional Communication Emphasis

You will learn how to write executive-ready memos, vendor escalations, corrective action plans, acceptance statements, and closeout reports.

4. Problem-Based Learning (PBL)

Each chapter is anchored by a scenario that forces you to think, interpret, analyze, and act—not memorize.

5. Incremental Skill Building

Each chapter builds directly on the last, culminating in a complete project package including:

- Project Charter
- Definition & Approach
- Cost Model & Schedule
- Risk & Control Plan
- Execution Worksheets
- Final Closeout Report

6. Vendor Management and Leadership Focus

You learn not just how to “run a project,” but how to lead people, hold vendors accountable, and navigate unexpected problems.



How to Use This Book

Each chapter includes:

♦ Scenario Brief

A realistic memo or directive launching the chapter.

♦ Plan of Attack

Step-by-step guidance on how to approach the deliverables.

♦ What You Will Submit

Clear expectations for graded work.

♦ Learning Resources

Templates, checklists, examples, and technical artifacts.

♦ Reflection Questions

Prompts to deepen learning and build leadership awareness.

♦ Instructor Notes

Evaluation criteria and teaching guidance.

This structure makes the book suitable for:

- Individual study
- Team-based courses

- Remote and hybrid classes
 - Professional development workshops
-

The Pedagogical Vision

This book is built on the belief that:

- **Project management is best learned by doing.**
- **Leadership grows out of practice, not definitions.**
- **Clarity, communication, and judgment are teachable.**
- **Realistic constraints develop real skills.**

By working through NovaMed, readers not only learn project management—they learn themselves. They discover how they respond under pressure, how they make decisions with incomplete data, and how they lead when others are depending on them.

The Outcome

By the time you finish the final chapter, you will have:

- Managed a complex vendor-driven software project
- Practiced schedule, cost, risk, and scope control
- Written dozens of executive-caliber communications
- Diagnosed real-world project failures
- Built a complete closing package
- Learned to think like a project manager
- Gained the confidence to lead real projects

This book helps you build more than academic knowledge—it helps you build a **professional identity**.

Dedication

This book is dedicated to

Dr. Ray Bareiss

My mentor, teacher, and guide.

Dr. Bareiss fundamentally shaped the way I think, lead, teach, and solve problems. His passion for learning, his gift for making complexity accessible, and his unwavering belief in the potential of his students have stayed with me long after our time together.

He taught me:

- to question deeply,
- to design thoughtfully,
- to communicate clearly,

- to teach with purpose, and
- to lead with integrity.

His influence lives in this book, in every effort to help students grow not just as project managers, but as thoughtful, capable professionals.

Although he passed away in January 2024, his impact continues through the lives and work of those he inspired. I am honored to carry forward a small piece of what he shared with me.

Thank you, Dr. Bareiss.

Your lessons continue to guide this journey.

Welcome Letter

Welcome Letter

Welcome to the Project Management Practicum

Dear Practitioner,

Welcome to **Project Management – A Practicum**, a course unlike any you've taken before. This isn't a class where you memorize definitions or passively read about project management. This is a course where you will *do* project management — where you will step into the role of a project leader, make decisions under pressure, interpret real artifacts, and discover who you are when the work gets real.

You won't be observing a project from the outside.
You will be **inside one**.

Throughout this course, you'll work with a fictional but highly realistic company called **C-Bay Inc.**, where you will help several scenarios. You'll read real-world memos, analyze statements of work, enforce contractual obligations, evaluate vendor performance, and respond to problems the way real project managers do every day.

You will experience:

- Ambiguous requirements
- Late deliverables
- Defect spikes
- Cost overruns
- Team and vendor issues
- Missing documentation
- Difficult decisions
- And the challenge of closing a project that hasn't gone as planned

Why?

Because that's what real project leadership looks like.

But don't worry — you won't be navigating this alone.

This book gives you step-by-step guidance, templates, examples, and structured support at every stage. You'll learn how to build project plans, write professional communications, track performance, make decisions rooted in data, and — ultimately — lead projects with clarity and confidence.

You will practice the skills that employers value most:

- Clear communication
- Critical thinking
- Professional judgment
- Documenting decisions

- Managing scope, schedule, cost, quality, and people
- Bringing work to completion with integrity

You'll also reflect deeply on your growth — on what challenged you, what surprised you, and what you discovered about yourself as a future leader.

By the end of this course, you won't just "know" project management.
You will have lived it.

I'm honored to be your guide through this journey. I have taught this course at De Anza College since 2004, with hundreds of students taking the certificate program.

Approach the work with curiosity, courage, and an open mind. Let each challenge teach you something. Let each decision make you stronger. And let this experience help you build the professional identity you deserve.

Welcome to the practicum.
Let's begin your journey as a project leader.

With respect and anticipation,
Bob Singh

How to use this book?

How to Use This Book

A Student Guide for Succeeding in the Project Management Practicum

Welcome to *Project Management – A Practicum*.

This is not a traditional textbook. You will not simply read concepts — you will **experience** them through an immersive simulation that mirrors how real project managers work.

This guide explains how to use each chapter, how the simulation works, and how to approach the materials so you get the most from the course.

1. Understand the Book’s Flow

Each chapter follows a predictable, structured format designed to guide you through the entire lifecycle of the NovaMed project.

Every chapter includes:

♦ **Scenario Brief**

A realistic memo or directive that launches the chapter and sets the context.

♦ **Plan of Attack**

A step-by-step walkthrough showing how to approach the assignment, what documents to use, and how to think like a project manager.

♦ **Learning Resources**

Templates, examples, artifacts, and tools you will use to complete your deliverables.

♦ **What You Will Submit**

Clear submission expectations.

♦ **Reflection Questions**

Prompts to help you capture what you learned and build leadership awareness.

♦ **Instructor Notes (for instructors)**

How your work will be evaluated.

Think of each chapter as one “phase” of the NovaMed project. You will complete deliverables just as a PMO team would.

2. Use the Artifacts to Drive Your Decisions

Each chapter provides real PM artifacts:

- Statements of Work (SOW)
- Contracts
- Reporting Guidelines
- High- and Low-Level Design documents
- Requirements (SRS)
- Status reports & Earned Value spreadsheets
- Defect logs
- Vendor performance data
- Email memos
- Templates and worksheets

Just like in a real project, you will need to:

- reference the SOW before evaluating deliverables
- check the contract before responding to staffing issues
- use the SRS when analyzing defects
- use the HLDD during integration breakdowns
- use the Reporting Guidelines when a status report is incomplete
- use the EV sheet to confirm cost/schedule performance

Always anchor your work in the documents.

Professional project managers do not guess — they reference.

3. Work Through Each ‘Plan of Attack’

Every chapter includes a structured Plan of Attack.
This is your *roadmap*.

Use it to:

- start your analysis
- see which tools you need
- understand your deliverable
- learn how to think like a PM

If you ever feel stuck, return to the Plan of Attack — it is designed to keep you moving.

4. Complete the Worksheets and Deliverables

Each chapter contains one or more templates or worksheets.
These documents guide your thinking and help you produce professional outputs.

You will produce deliverables such as:

- Project Charters
- Scope/Approach documents
- Cost and Schedule estimates
- Risk & Control matrices
- Execution-phase memo responses
- Acceptance matrices
- Closeout reports

Save all your work.
By the end of the course, you will have built a real **project management portfolio**.

5. Pay Attention to Tone and Professionalism

In Chapters 5 and 6, you will write:

- vendor communication emails
- corrective action messages
- escalation memos
- acceptance decisions
- leadership summaries

Write these as if you were a **project manager at C-Bay Inc.**

Tone matters.

Structure matters.

Clarity matters.

Every memo is an opportunity to build your professional voice.

6. Use the Reflection Questions to Build Leadership Intelligence

Project management is not just about documents.

It is about:

- judgment
- clarity
- communication

- resilience
- working with imperfect information

The Reflection Questions in each chapter help you build:

- self-awareness
- leadership presence
- ethical thinking
- communication discipline

Treat these reflections seriously.
They turn experience into wisdom.

7. Ask One Guiding Question in Every Chapter

“What would a real project manager do here?”

Let this question guide you.
Use your documents.
Use your templates.
Use your reasoning.
Use your voice.

By the end of this book, you will not only understand project management —
you will understand yourself as a project manager.

8. Save Everything — It Becomes Your Portfolio

The work you produce in this book becomes:

- resume content
- interview talking points
- writing samples
- PM portfolio pieces

Many students use their NovaMed deliverables to demonstrate project management competency to employers.

9. Enjoy the Journey

This book is designed to:

- challenge you
- stretch your thinking
- expose you to real-world complexity

- grow your confidence
- help you find your leadership voice

Every memo, document, and deliverable is part of a story —
your story as a developing project manager.

Lean in.

Ask questions.

Make decisions.

Learn from uncertainty.

And remember:

project management is not about perfection — it is about progress, clarity, and leadership.

How was this book created?

Designing an Authentic, Experience-Based Project Management Practicum

This book was created with a single goal:

to teach project management in a way that mirrors the complexity, ambiguity, and responsibility of real-world practice.

Traditional textbooks explain project management concepts.

This book helps students **live them**.

The development of this practicum was guided by several core principles:

1. Grounded in Real Project Scenarios

The chapters were modeled after authentic PMO workflows used in industry:

- Project initiation
- Scope development
- Cost and schedule estimation
- Risk and control planning
- Execution oversight
- Vendor management
- Project closeout

Every step was crafted to feel real — because in practice, it is.

Students interact with:

- Statements of Work
- Software Requirements Specifications
- High- and Low-Level Design documents
- Contracts and reporting guidelines
- Vendor memos, status reports, performance data
- Acceptance criteria and closeout documentation

These artifacts were adapted from industry-inspired templates, with careful enhancements to fit educational use.

2. Driven by Problem-Based Learning (PBL)

The book was designed around **Problem-Based Learning**, a method championed by world-class educators including the late **Dr. Ray Bareiss**, whose influence is woven into the structure and intention of this text.

PBL revolves around:

- Real problems
- Authentic roles
- Team-based reasoning
- Progressive complexity
- Reflection and evaluation

Each chapter begins with a **Scenario Brief**, followed by:

- A **Plan of Attack**
- Tools and resources
- Templates and action guides
- Submission requirements
- Reflections and lessons learned

This structure gives students a **scaffolded learning pathway** without reducing the realism or complexity of the scenarios.

3. Constructed Through Simulation-Based Design

The core of this practicum is a **full-scale simulation** of the NovaMed project.

The simulation layers:

- Documents
- Data
- Memos
- Defects
- Performance metrics
- Vendor behavior
- Technical dependencies
- Contractual constraints
- Managerial judgment

Each memo or progress artifact was meticulously crafted to mirror real vendor-client interactions — including incomplete information, unclear statements, hidden issues, and escalating complexity.

This gradual escalation builds confidence week after week and teaches students **how to think**, not just what to do.

4. Built with Instructor Flexibility in Mind

Every component of the book was designed to be modular:

- Instructors can choose to run the full simulation or only selected chapters.
- All templates are reusable across semesters.
- Instructor Notes accompany each chapter to simplify evaluation.
- Deliverables scale for individual or group learning.
- Worksheets and closeout materials create a comprehensive student portfolio.

This ensures the book works for:

- Online courses
 - Face-to-face classes
 - Hybrid teaching
 - Accelerated programs
 - Professional training environments
-

5. Created with Authenticity and Professionalism

Great care was taken to ensure that:

- Email/memo tone sounds like real vendor communication
- Earned Value data reflects plausible project performance
- SOW and Contract language aligns with industry standards
- HLDD and SRS components reinforce actual software engineering practice
- Reflection prompts build leadership awareness
- Closeout deliverables feel like real PMO documentation

Students walk away with a **portfolio of real PM outputs**, not just knowledge.

6. Developed with Love, Purpose, and Legacy

This book was shaped in part as a tribute to **Dr. Ray Bareiss**, a mentor whose work in problem-based learning has influenced generations of project managers, technologists, and educators.

His influence shows up in:

- The commitment to authentic problems
- The emphasis on reasoning, not memorization
- The integration of story with structured learning
- The dedication to student growth and reflective practice

His legacy lives in these pages.

The Outcome

This book was created to empower students to:

- Think systematically
- Communicate professionally
- Lead teams with clarity
- Manage ambiguity
- Make decisions under pressure
- Close projects responsibly
- Embrace the full project lifecycle
- Grow into confident project leaders

If this book succeeds, it is not because it teaches project management concepts — but because it teaches students to become project managers.

Motivational Message for the first day of class.

Welcome to the Project Management Practicum

Welcome, everyone.

Today isn't just the first day of a class — it's the first day of a new way of thinking.

Project management isn't something you memorize.

It's something you **step into**.

Over the next several weeks, you will take on the role of a leader inside a living, breathing project. You'll read real memos, solve real problems, manage real ambiguity, and make decisions that matter. You'll see what happens when a vendor slips, when designs break, when defects escalate, when cost and schedule fall behind, and when leadership needs your voice.

You won't always have perfect information —
because real project managers don't.

You won't always feel certain —
because leadership is built in the gray areas.

But here's what you will have:

- A structured path
- A set of powerful tools
- Realistic project artifacts
- Step-by-step guidance
- Templates that mirror industry practice
- A safe place to make mistakes
- And a community learning alongside you

Most importantly, you will have **yourself** — your judgment, your clarity, your ability to analyze, communicate, and rise to the challenge.

This course will test you.

You will be uncomfortable at times.

There will be moments when the problem seems bigger than the solution.

But every one of those moments is an opportunity —
to strengthen your voice, grow your confidence, and build a professional identity that stays with you long after this course ends.

By the time you reach the end of this practicum, you will not simply *know* project management —
you will have *practiced it*,
felt it,
led it,
and *earned it*.

You are capable.

You are ready.

And you belong here.

Welcome to the journey.
Let's build something extraordinary together.

This page titled [Motivational Message for the first day of class](#). is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

Meet the Author

Bob Singh is a project management educator and practitioner dedicated to helping students build real-world leadership skills through hands-on, scenario-based learning. With decades of experience managing complex technical projects, Bob designs learning environments where students practice communication, decision-making, risk analysis, and vendor management exactly as they occur in industry. His mission is simple: to prepare the next generation of project managers to lead with clarity, confidence, and integrity.

Licensing

Creative Commons Licensing



BY icon" width="145" height="51" loading="lazy" data-quail-id="4">

This course, ASCCC OERI— Project Leadership, is licensed under CC BY.

As explained by Creative Commons, this means you are free to:

- **Share** — copy and redistribute the material in any medium or format
- **Adapt** — remix, transform, and build upon the material for any purpose, even commercially.

Under the following terms:

- **Attribution** — You must give appropriate credit, provide a link to the license, and indicate if changes were made. You may do so in any reasonable manner, but not in any way that suggests the licensor endorses you or your use.
- **No additional restrictions** — You may not apply legal terms or technological measures that legally restrict others from doing anything the license permits.

AI Use in Course Development – Transparency & Standards

During early idea generation and drafting of course pages, we used ChatGPT as a supportive tool not as a substitute for human expertise. Specifically:

- The AI's role was strictly initial drafting, not final content production.
- Every output was then thoroughly reviewed, edited, and revised by the course authors to ensure pedagogical quality, accuracy, and alignment with learning goals.

Copyright & Fair Use Considerations

We aligned with evolving IP policy frameworks, especially insights from the U.S. Copyright Office:

- The [Office's Part 3 report on AI model Links to an external site.](#) training highlights the importance of fair use analysis and restricts reliance on generative AI when it could replicate copyrighted works—our use was limited to non-protected, openly licensed materials.
- This cautious approach is consistent with [guidanceLinks to an external site.](#) that encourages transformative use, transparency, and limiting output that could inadvertently mirror protected content.

Licensing statement for this course

ASCCC OERI Project Leadership by Sukhjot (Bob) Singh is licensed under a [Creative Commons Attribution 4.0 International LicenseLinks to an external site.](#).

A detailed breakdown of this resource's licensing can be found in **Back Matter/Detailed Licensing**.

This page titled [Licensing](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

1: FOUNDATIONS OF PROJECT MANAGEMENT

Introduction: How to Use This Book and Why It's Different

Before you dive into your first project milestone, take a moment to understand what this book is—and what it isn't.

This isn't a textbook filled with passive definitions and abstract theories. It's a **practicum**, built around a real-world simulation. You are not just learning project management—you are **stepping into the role of a project manager** from the start.

The front matter of this book gives you the foundation for that journey. It explains:

- How the book is structured
- Why we use a **Problem-Based Learning (PBL)** model
- What tools and templates will support you
- What it means to work as a project team
- How grading, collaboration, and communication will work
- Who you are working for (*C-Bay Inc.*), and what kind of leader you're becoming

This section also introduces the **mindset** behind your experience. You'll learn what to expect, how to prepare, and how to grow through the discomfort of ambiguity—just like a real project leader would.

Whether you're a beginner or have prior experience, the front matter gives you the tools, philosophy, and clarity you need to start strong.

[1.1: Preface](#)

[1.2: How to Use This Book](#)

[1.3: Overview](#)

[1.4: Problem Based Learning](#)

[1.5: Your Role](#)

[1.6: Tools And Resources](#)

[1.7: Grading and Assessment Overview](#)

[1.8: Collaboration and Integrity](#)

[1.9: Problem Based Student Guide](#)

[1.10: Overview of C-Bay](#)

[1.11: Forming Teams for the Practicum](#)

This page titled [1: Foundations of Project Management](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

1.1: Preface

Preface

Welcome to *Project Management – A Practicum*. This is not a course where you will sit back, listen, and memorize. It is a course where you will lead.

This book—and the course it supports—is designed to prepare you for real-world project management by placing you inside a simulated business environment from Day 1. Each chapter immerses you in a professional challenge, gives you just enough structure to begin acting, and then asks you to deliver. What you learn will not come from watching someone else solve a problem. It will come from grappling with ambiguity, navigating team dynamics, making judgment calls, and standing behind your decisions.

You will not be reading about project managers. You will become one.

At the heart of this course is a fictional company called **C-Bay Inc.**, a fast-growing tech firm facing complex infrastructure decisions. Through the lens of C-Bay's challenges, you will encounter every major phase of project work:

- **Initiation**
- **Planning**
- **Scope definition**
- **Cost estimation**
- **Risk identification**
- **Execution and control**
- **Closure and reflection**

But unlike a typical textbook, you won't be asked to define these terms. You'll be asked to act on them. You'll read a memo from the Director of IT, meet with your team, and decide how to respond. You'll produce a Project Charter, develop evaluation criteria, score options, and deliver a live executive presentation. You will submit deliverables that look and feel like they came from a real project team—because they will.

The goal of this book is not to prepare you for a test. The goal is to prepare you for the moment when someone turns to you and says, *"Can you lead this project?"*

Whether you're new to project management or looking to sharpen your practical skills, this book gives you the opportunity to think, decide, build, and revise—just like professionals do. And you won't be doing it alone. This is a team-based course, and your success will depend not only on what you produce, but how you collaborate, communicate, and lead alongside others.

At times, this approach may feel uncomfortable. There will be no tidy checklists, no step-by-step walkthroughs, and no guaranteed outcomes. You will have to make assumptions, defend trade-offs, and own your mistakes. That is by design.

Because in the real world, the people who succeed in project management are not the ones who memorize the most. They are the ones who can move a project forward—when the clock is ticking, the path is unclear, and everyone else is waiting for direction.

This textbook is your practice field. We've designed each chapter to give you a realistic challenge, professional tools, and a safe space to fail, recover, and grow. You will leave this experience not only with knowledge—but with stories, confidence, and a working portfolio of your project leadership skills.

We're excited to see where you take it.

This page titled [1.1: Preface](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

1.2: How to Use This Book

How to Use This Book

This textbook is not a lecture. It is a **learning environment**, carefully structured to simulate real-world project work. Each chapter represents a new phase of a fictional but highly realistic project, with you and your team cast as professionals—not students—tasked with delivering results under time and information pressure.

Here's how to navigate it effectively.

Chapter Structure

Every chapter follows a consistent structure so you can focus on applying your skills—not figuring out what's expected.

Each chapter includes:

1. **Scenario Brief** - You begin with a professional challenge—a memo, a directive, or a real-world problem that sets the context for your work.
2. **Plan of Attack** - A step-by-step strategy to organize your team's thinking, define your approach, and make progress with clarity.
3. **What You Will Submit** - This section clearly outlines your deliverables—what you're expected to produce and why it matters professionally.
4. **Reflection and Debrief** - Prompts and questions to help you capture lessons, give feedback, and build awareness of how you think and lead.
5. **Submission Checklist** - A final quality assurance check to ensure your team's work is complete, clear, and ready for review.
6. **Instructor Notes / Evaluation Criteria** - Transparent grading guidelines, rubrics, and optional peer review frameworks.

Use the Tools Strategically

Each chapter links to specific **templates**, **examples**, and **reference guides**. These tools are not meant to be filled out mindlessly. They are professional frameworks to guide your thinking—use them **when you need them, how you need them**.

Common tools include:

- Project Charter Template (with Example)
- Evaluation Matrix Builder
- Cost Model Starter
- Work Breakdown Structure Grid
- Presentation & Slide Design Guides
- Team Planning Worksheets

Each tool is introduced at the point it becomes relevant. You'll also find examples from previous teams to show you what "good" can look like.

Work as a Team

This book is designed for **collaborative use**. You will succeed when you communicate clearly, share documents early, and divide the workload intentionally.

Start each chapter by:

- Reviewing the scenario together
- Choosing or rotating team roles
- Creating a timeline using the work planning tools

- Committing to regular meetings or check-ins
- Supporting each other—not just task-wise, but emotionally and professionally

Build Your Portfolio

Everything you produce—charters, matrices, slides, reflections—is part of a growing **Project Management Portfolio**. Keep track of your documents. These deliverables can be adapted for job interviews, course capstones, or even entry-level project coordinator roles.

When You Get Stuck

That's expected. This book isn't about perfection—it's about learning how to think like a project manager when the path isn't clear.

Instead of asking "What's the right answer?", ask:

- What do we know?
- What's missing?
- What assumptions can we make (and state transparently)?
- What would a real professional do in this situation?

Use your team, tools, and instructor as resources—but keep the accountability with yourself.

1.3: Overview

Overview

This book invites you to learn project management by **doing project management**—from the very first page.

You won't be reviewing theoretical definitions or filling out isolated worksheets. Instead, you'll be embedded in a high-pressure business scenario at a fictional but realistic company, **C-Bay Inc.**, and asked to deliver. Your success will depend on your ability to **act, analyze, lead, communicate, and adapt**—not just absorb.

Throughout the course, you'll move through the full lifecycle of a strategic project in a team-based environment. By the end, you will have created a **portfolio of professional-quality deliverables** and built the kind of self-directed, team-oriented, and judgment-based skills that employers expect in project management roles.

The C-Bay Simulation

The backbone of the practicum is a multi-phase simulation centered around C-Bay Inc., a tech company facing urgent infrastructure and organizational decisions. The company is scaling rapidly and has tasked your team with solving real business problems:

- Where should they expand?
- How should they budget for future growth?
- What risks should they mitigate?
- How should they communicate with stakeholders and leadership?

You'll take on these challenges as a **consulting team embedded in the organization**, not as students solving classroom problems.

Each Chapter = A Real Project Milestone

Each chapter represents a new milestone in the C-Bay project. Just like in the workplace, your work will evolve as the situation unfolds:

Course chapter-to-milestone progression showing how each chapter corresponds to a key project management deliverable and builds practical experience through a simulated project lifecycle.

Chapter	Milestone
1. Initiating the Project	Clarify the challenge, form your team, deliver your charter and recommendation
2. Defining Scope and Success	Break down requirements, build a formal scope statement
3. Estimating Costs and Planning Resources	Construct a basic cost model and resource plan
4. Identifying Risks and Planning for Change	Identify risks, design mitigation strategies, and build change response plans

5. Executing and Monitoring	Track performance, build a dashboard, manage mid-course adjustments
6. Closing the Project	Deliver your final report and reflection, and capture lessons learned

This structure mirrors professional project workflows—meaning you’re building experience **in sequence, with relevance**.

Your Journey

By the end of the course, you will have:

- Managed a simulated infrastructure project from initiation to close
- Delivered key documents like a Project Charter, Evaluation Matrix, Cost Model, WBS, and Presentation
- Rotated or specialized in roles like PM, Analyst, Presenter, or Risk Lead
- Learned how to make decisions, communicate under pressure, and reflect meaningfully on your process

You will not just “understand” project management—you will be **living it**, chapter by chapter.

1.4: Problem Based Learning

Problems drive Solutions

This course is built on a learning model called **Problem-Based Learning (PBL)**—a philosophy that flips the traditional classroom approach on its head. Instead of giving you content and then asking you to apply it, **PBL** gives you a **realistic problem first**, and challenges you to figure out how to respond.

This is how professionals actually work.

In the real world, you don't get a lecture before a project is assigned. You get a meeting invite, a vague email, or a fast-moving crisis—and you have to act. That's what this course is preparing you for.

What Makes PBL Different?

Traditional education:

- Gives you all the information upfront
- Asks you to apply what you were told
- Assumes the instructor has all the answers

Problem-Based Learning:

- Starts with a messy, real-world problem
- Asks you to uncover what information is needed
- Assumes you can become the expert through action, reflection, and iteration

How PBL Works in This Book

Each milestone begins with a **Scenario Brief**—a realistic email, memo, or directive that places you in a role and sets a clear expectation. You're not just "completing an assignment." You're responding to a business situation under pressure, in a team.

Then you'll move through a flexible but structured process:

1. Clarify the problem
2. Identify what's known vs. unknown
3. Use tools when needed (not before)
4. Make decisions, create deliverables, and communicate them
5. Reflect on what worked—and what didn't

Support is provided not in the form of lectures, but through **tools, examples, templates, coaching, and checklists** that you access *just in time*.

What you are Actually Learning

This book will teach you:

- How to work when there's no clear roadmap
- How to make assumptions—and document them transparently
- How to collaborate under pressure

- How to own a role and still contribute to the team
- How to present decisions with clarity and confidence
- How to think like a project manager

• Why It Works

PBL works because it mirrors what you'll face in real job settings—ambiguity, competing priorities, missing data, and people who expect you to lead. It builds lasting skills through:

- **Judgment under uncertainty**
- **Strategic thinking across silos**
- **Team leadership and accountability**
- **Reflection, iteration, and growth**

This method won't just make you a better student. It will make you the kind of project contributor teams want to keep—and eventually the one they trust to lead.

1.5: Your Role

Your role as a Project Team Member

You are not a passive observer in this course. You are not waiting for instructions. You are a professional stepping into a high-stakes environment—and your choices matter.

In this book, you are cast not as a student, but as a **project team member**. Sometimes you'll lead. Sometimes you'll support. But always, you will be expected to think, communicate, and act like someone accountable for outcomes—not just assignments.

Think Like a Consultant

From the very first milestone, you are embedded in a simulated business challenge. You'll receive a request from C-Bay's leadership—often vague, urgent, and lacking complete information. Your job isn't to complain about ambiguity. Your job is to create clarity.

That means:

- Framing the problem using professional judgment
- Gathering and interpreting data
- Making recommendations—even when the data isn't perfect
- Communicating confidently to leadership
- Owning the result, good or bad

This is what consultants, project managers, analysts, and team leads do every day.

Work as a Team Member

You will be working in a team across all milestones. Collaboration isn't optional—it's the core of how work gets done in this practicum.

You are expected to:

- Contribute ideas and artifacts consistently
- Divide work early and revise it together
- Support your teammates, especially when timelines are tight
- Be honest about availability and challenges
- Rotate or specialize in roles based on the milestone needs

The quality of your experience will depend on how well you engage—not just with the content, but with each other.

Rotate Roles or Specialize

Each milestone invites you to take on a **functional leadership role**, such as:

- **Project Manager** – organizes the work, holds the big picture
- **Facilities Lead** – focuses on research and physical needs
- **IT Lead** – ensures technology and systems are addressed
- **Finance Lead** – manages cost estimates and modeling
- **Presenter** – translates analysis into clear recommendations

You may rotate roles by milestone, or assign permanent leads. Either approach is valid—as long as everyone is engaged and

accountable.

Use the tools provided (such as the **Project Process Planning Sheet** and **Team Role Assignment Sheet**) to clarify responsibilities.

Be Professionally Accountable

You will not be micromanaged. You are expected to:

- Own your deadlines
- Document your decisions
- Communicate progress or roadblocks
- Ask for help when needed
- Deliver work that reflects care, clarity, and critical thinking

This experience is designed to prepare you for real-world professional environments. The more you treat it that way, the more you will grow—not just as a learner, but as a leader.

1.6: Tools And Resources

Tools and Resources

This practicum doesn't hand you all the answers up front—but it does give you the **tools professionals use** to make decisions under pressure. These aren't fill-in-the-blank templates. They are **frameworks for action**—designed to support your thinking, help your team organize, and give shape to your deliverables.

Each chapter includes a curated **toolkit** that expands as the project progresses. You'll find templates, examples, worksheets, and guides—each timed to match what the milestone demands.

You are encouraged to **adapt** these tools. Reformat them, modify them, rebuild them—whatever helps your team work more effectively.

Core Tools Provided

Here are some of the primary resources you'll encounter in Chapter 1 and beyond:

Project management tools and templates provided throughout the practicum to support planning, decision-making, communication, execution, and project delivery.

Tool Name	What It Helps You Do
Project Charter Template (with Example)	Draft a clear, professional-grade charter that defines the purpose, scope, objectives, risks, and stakeholders for your project.
Decision Matrix Builder	Compare multiple facility or project options using weighted evaluation criteria. Helps your team structure decisions with transparency.
Work Planning Guide	Organize your tasks, define roles, assign deadlines, and identify dependencies early. Promotes clarity and progress tracking.
Work Breakdown Structure (WBS) Grid	Translate your high-level project into manageable chunks. Supports milestone planning and team task ownership.
Project Process Planning Sheet	Assign functional leads (e.g., PM, IT, Finance) and define how your team will operate, review, and iterate.
Slide Design Playbook	Learn how to build clean, effective slides that support your message. Covers layout, color, font size, and clarity.
Executive Communication Guide	Teaches how to present big ideas simply, starting with recommendations, highlighting drivers, and preparing for stakeholder questions.

Initiation Brief	Simulates the directive from your executive stakeholder at C-Bay. Launches each milestone with urgency and purpose.
Reflection Worksheet	Promotes metacognition. Helps individuals and teams review their process, clarify lessons, and build habits for future leadership.

File Formats

You'll work with:

- Word/Docs for charters, planning docs, and reflections
- Excel/Sheets for matrices, cost models, and WBS
- PowerPoint/Slides for executive presentations

Use the following naming convention when saving and sharing files:

CBay__TeamX

Example: CBay_ProjectCharter_TeamB.docx

This ensures version control, easy submission, and team-wide access.

How to Use These Tools Effectively

1. Use them when you need them. Don't fill out a tool just because it's available. Use it because it helps you move forward.
2. Don't just complete them—discuss them. Most tools are designed to spark team dialogue and alignment.
3. Customize them. Make them your own. Add rows, re-label sections, or restructure formats to fit your context.
4. Save your versions. Your submissions will form the foundation of your professional portfolio.

Advanced Skill-Builders (Optional)

Some chapters also include **bonus tools** for students who want to go further, including:

- **Project Schedule Export Viewer** – Practice reading and structuring a timeline like a project coordinator
- **Peer Team Process Notes** – Real-world examples of how other student teams planned and worked together

You're not expected to master all tools in one go. Use what helps, when it helps—and return to refine your approach as your understanding grows.

1.7: Grading and Assessment Overview

Your Grading and Assessment Overview

This course is not graded like a traditional test-based class. Your success will be evaluated based on your **ability to think, collaborate, produce, and improve**—just like in real project work.

Assessment is structured around your **milestone deliverables**, the **process you followed to create them**, and the **insight you gained from the experience**. You are not being judged on perfection. You are being evaluated on professionalism, effort, logic, and your willingness to engage deeply with the problem.

What You're Graded On

Each milestone is assessed across three primary areas:

Evaluation criteria used to assess project deliverables, team collaboration processes, and individual reflection and growth throughout the practicum.

Area	What We're Looking For
Deliverables	Are your outputs clear, complete, and persuasive? Do they demonstrate critical thinking, structure, and polish?
Team Process	Did your team divide responsibilities, meet regularly, resolve conflicts, and deliver as a unit?
Reflection and Growth	Did you engage with feedback? Did you reflect honestly on what worked and what didn't? Did your work improve over time?

Grading Breakdown (Example)

Each instructor may adapt the weighting slightly, but here is a common breakdown:

Sample grading breakdown showing the percentage weighting assigned to project deliverables, presentation quality, team collaboration, and professional reflection.

Category	Points
Charter + Matrix + Cost Model	40%
Presentation Quality + Delivery	25%
Collaboration and Team Process	20%

Reflection + Professional Growth	15%
Total	100%

Some instructors also include **peer evaluation**, especially in online or hybrid courses. Your ability to collaborate respectfully and consistently matters.

What Makes Work “Excellent”

Excellent work doesn’t mean “flawless.” It means:

- You framed the problem clearly
- You made logical, well-justified decisions
- You communicated in a way that stakeholders could understand
- You demonstrated curiosity, ownership, and improvement

Checklists and rubrics are included with each milestone to help you self-assess. These are not “gotcha” tools—they are quality guides.

Late Work and Revisions

Deadlines in this course are modeled after **real project constraints**. Submitting late means your stakeholders move on without your input.

However, some instructors allow resubmission or reflection-based revisions. The key is communication: **If you’re stuck, ask early**. Don’t ghost your team. Don’t wait until it’s too late.

A Note on Feedback

You will receive both instructor and peer feedback throughout this course. Please treat it as a **gift, not a judgment**.

Feedback is not about your worth. It’s about your growth.

Strong project leaders listen, adapt, and improve. That’s how they earn trust—and that’s how you will too.

1.8: Collaboration and Integrity

A Team-Based Course

This is a team-based course. Every chapter, every milestone, and every decision is designed to be approached collaboratively. Your success will not be determined by what you can do alone—but by how well you can **work within a team**, share accountability, and build something better together.

Collaboration is not a side feature of this course—it is the **engine of learning**.

At the same time, integrity matters. Your work must reflect authentic thinking, open communication, and shared effort. In a PBL environment, cheating doesn't look like copying an answer key—it looks like hiding behind others, faking participation, or delivering something you didn't contribute to.

What Collaboration Looks Like

Successful collaboration includes:

- Dividing roles intx transparently
- It also means giving credit where credit is due. If a teammate develops a model or design that becomes core to your deliverable, acknowledge it.

Our Commitments to Each Other

In this course, every team is expected to uphold a **Team Compact**—a shared agreement about how you will work together. It might include:

- Communication norms (frequency, method)
- Expected time commitment from each member
- What happens when someone misses a deadline
- How you'll resolve disagreements
- How you'll rotate or assign roles
- How you'll make decisions as a group

You'll be given a tool to help draft this compact in Chapter 1. Your instructor may collect or approve it—but even if not, treat it as your team's **social contract**.

What Violates Academic Integrity in This Course?

In a project-based course, academic dishonesty can take subtle forms. The following are considered **violations**:

Examples of academic integrity violations and explanations of how they undermine learning, teamwork, professional responsibility, and ethical project practice.

Action	Why It's a Violation
Submitting deliverables written by someone else	Misrepresents authorship and learning
Copying previous team work without attribution	Ignores your own team's responsibility to learn

Letting one team member do all the work	Exploits the grading structure
Falsifying data or assumptions	Breaks professional and ethical standards
Withholding collaboration from your team	Undermines team learning and trust

If in doubt, ask your instructor. The goal here is to **build professional trust**, not play “gotcha.” You will be treated like an adult—so act like one.

Integrity Is Leadership

People often think of integrity as a set of rules to follow. In this course, we treat integrity as a **leadership trait**.

When you speak honestly, meet deadlines, ask for help, and take responsibility—you build trust. And in project work, **trust is currency**. Without it, nothing moves.

So be generous with your collaboration. Be transparent with your questions. And take pride in the fact that what you submit is a product of shared effort, shaped by thoughtful choices, and built with integrity.

1.9: Problem Based Student Guide

Problem-Based Learning Student Guide

This course may feel different from anything you've experienced before. That's intentional. It is designed using a powerful method called **Problem-Based Learning (PBL)**—an approach that doesn't ask you to memorize steps, but to make decisions. Not to absorb knowledge passively, but to take action under pressure. Not to answer made-up questions—but to solve meaningful problems.

This section is your guide to navigating that difference—and to succeeding in a course where **you are the professional**, not the bystander.

What Is Problem-Based Learning?

Problem-Based Learning (PBL) is an instructional model that begins with an ill-structured, realistic problem—and places you in a position of responsibility to respond. You aren't told what to do. Instead, you are cast in a professional role and asked: *"What now?"*

You will:

- Receive incomplete, complex information
- Work in a team to analyze the situation
- Make assumptions and justify them transparently
- Use professional tools to build deliverables
- Defend your recommendations to "executives"
- Reflect on your process and improve as you go

PBL works not because it makes things easier—but because it makes learning **stick**. It activates critical thinking, emotional investment, and personal growth in ways that passive content delivery cannot.

Why We Use PBL in This Course

In real life, no one hands you a checklist before asking for a plan. You're given a deadline, a high-stakes decision, or an executive request—and expected to respond.

That's what this course simulates. When you step into the C-Bay project, you aren't practicing theory. You are **practicing the job**.

Here's what that looks like in action:

Comparison of traditional project management instruction and problem-based learning (PBL) approaches, highlighting differences in student responsibility, decision-making, and real-world application.

In Traditional Courses	In This PBL Course
You memorize the definition of a Project Charter	You build one from scratch in response to an executive memo
You follow an example of a cost model	You estimate real costs for an infrastructure decision and defend your math

You learn about stakeholder management	You present to “executives” and answer live questions about your recommendations
You wait to be told what to do	You organize your team and define your own process using professional tools

This approach develops **professional readiness**—not just academic knowledge.

What You’ll Learn (Even If It’s Not in the Text)

PBL helps you build skills that rarely show up on multiple-choice tests, but matter enormously in real life:

- How to start when you don’t have enough information
- How to think critically instead of react emotionally
- How to communicate ideas in ways people understand and support
- How to work with teammates who think differently than you
- How to own your mistakes and use them to improve
- How to reflect with honesty and lead with confidence

These are not academic skills. They are **leadership traits**—and they are built, not taught.

What Supports Are Provided?

This course gives you **just-in-time support**, not one-size-fits-all lectures. Here’s how that works:

- Scenario Briefs launch each milestone with urgency and context
- Tools and Templates (like the Charter Template, WBS Grid, and Slide Guides) are provided only when you’re ready to use them
- Reflection Worksheets help you look back at what worked—and what didn’t
- Peer Examples and Notes show how others have succeeded (and failed) in similar situations
- Instructor Coaching focuses on your questions and direction—not on feeding you answers

What Success Looks Like in PBL

There is no single “right” answer in this course. But there are **strong, thoughtful, well-defended decisions**—and there are weak, unsupported, copy-paste ones.

Success in PBL looks like this:

- You take initiative early
- You speak up in your team
- You organize and clarify chaos
- You use the tools—then go beyond them
- You submit professional-quality work
- You reflect deeply, learn fast, and show growth

Final Thought: You Were Meant to Lead

This course might feel challenging, disorienting, or even overwhelming at times. That’s not a flaw. That’s what leadership often feels like—especially in the beginning.

The purpose of Problem-Based Learning is not to simulate comfort. It is to simulate **reality**. Because in reality, leaders don’t wait for perfect instructions. They move forward with what they know, build momentum, and bring others with them.

That's what you're being asked to practice here.

And we believe you can do it.

This page titled [1.9: Problem Based Student Guide](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjitt "Bob" Singh.

1.10: Overview of C-Bay

Context and Task

C-Bay Inc. is a global **online real estate auction company** that has redefined how people buy, sell, and trade real estate in a digital-first economy. With its roots in Silicon Valley and its reach spanning continents, C-Bay combines the agility of a tech startup with the transactional weight of an international property marketplace.

Founded in 2000 and scaling rapidly in 2025, C-Bay allows individuals, investors, and corporations to acquire real estate assets through **auction-based formats** or **fixed-price listings** via its flagship feature: **Purchase-Without-Bidding**. The company now supports transactions for over 10,000 live listings on any given day—including land parcels, residential homes, timeshares, and commercial properties.

You are joining the company at a pivotal moment. As C-Bay enters a new phase of aggressive international expansion, it is investing in infrastructure, talent, and systems to support an evolving, global marketplace.

What C-Bay Does

C-Bay's platform enables users to:

- Buy and sell real estate via online auctions or fixed-price listings
- Engage with international markets, with local sites tailored to North America, the EU, Asia-Pacific, and emerging regions
- Access land, residential, commercial, and investment properties in real time
- Transact securely, using proprietary bidding tools and payment gateways

With its scale, reach, and proprietary infrastructure, C-Bay has become one of the most trusted brands in online property transactions. By 2025, it has processed billions in property value and established a user base of thousands of registered buyers, sellers, and institutional partners.

Revenue Model

C-Bay generates revenue through a diversified portfolio that includes:

- **ASP Services** – Offering auction/bidding optimization to other platforms as an Application Service Provider
- **Merchandising** – Monetizing its community through ancillary services, premium property listings, and partnerships
- **Promotional Ties and Sponsorships** – Partnering with brands to sponsor bidding events or enhance buyer exposure
- **Subscription Fees** – Providing enterprise-grade analytics and optimization tools to procurement departments and power users
- **Global Advertising** – Selling high-visibility digital real estate to sponsors and advertisers seeking a real estate-savvy audience

By year five of its revised growth plan, C-Bay aims to drive revenues from a 6-channel blend: 30% merchandising, 23% advertising, 15% B2B solutions, and 32% combined from sponsorships, affiliates, and international operations.

Why This Project Now?

C-Bay is not only scaling in revenue and market reach—it's also under intense scrutiny. As a newly public company, it must now meet investor expectations, regulatory compliance requirements, and rapid scalability benchmarks. The leadership has prioritized **expansion of IT infrastructure, staff capacity, and global site operations** as key goals for Q3–Q4 of FY25.

However, C-Bay's **current facilities and systems are maxed out.**

As of now:

- The company has outgrown its Fremont headquarters
- The IT division needs to house over 170 staff, up from 36 last year
- Its primary data center hosts over 240 servers, but lacks geographic redundancy
- There are pressing needs for backup systems, secure co-location, and 24/7 uptime across regions

Your consulting team has been called in to initiate and drive this transformation.

The C-Bay Philosophy

C-Bay operates on a core set of principles—what they call **“The C-Bay Way.”** These values shape not just the business model, but also the expectations of every project team:

- Be Honest. Honor Commitments.
- Build for Scalability, Security, and Performance.
- Think Big, Execute Small.
- Use Teams, Tools, and Technology in harmony.
- Learn from failure—then codify the lesson.
- Never make the same mistake twice.

You are being invited into this culture—not as a trainee, but as a contributor.

Your Role in the Simulation

You are part of a consulting team brought in under C-Bay's internal **Apprenticeship Program**. This program simulates real consulting engagements on small but mission-critical projects. The expectations are real:

- Initiate the project with a Charter and Evaluation Framework
- Present facility and data center expansion options
- Deliver executive briefings to leadership
- Reflect, revise, and move the project forward

Your success will be measured not by how closely you follow instructions, but by how well you think, collaborate, and lead within the fast-evolving world of C-Bay.

1.11: Forming Teams for the Practicum

Forming Teams

Project management is not a solo endeavor. Nearly every milestone in this book—and every meaningful project in the real world—depends on your ability to **collaborate, communicate, and lead within a team**.

This practicum is designed to simulate **real organizational behavior**, and that includes the complexities, messiness, and rewards of working with others. You will not only build deliverables—you will build a functional team.

Whether your group is assigned or self-selected, how you set up and manage your team from Day 1 will directly impact your experience and outcomes.

Why Team Formation Matters

You might be tempted to start working on your milestone immediately—especially if deadlines are tight. But skipping over proper team formation is one of the fastest ways to derail momentum.

Clarifying expectations, roles, communication habits, and decision-making protocols **early** will help your team:

- Reduce confusion about who owns what
- Avoid duplicated or missing work
- Resolve conflicts without escalation
- Deliver higher-quality products—faster
- Feel more supported and confident

In other words: **Investing in the team is investing in the project.**

The Components of a Strong Team

Effective project teams typically define the following components up front:

Team charter planning guide outlining key decisions related to team identity, roles, communication, collaboration, scheduling, decision-making, and conflict resolution.

Element	What to Discuss
Team Name	Choose a name that reflects your collective identity or purpose (e.g., ApexPM, Team Vanguard). It builds group cohesion.
Role Assignments	Assign roles based on interest, skill, or rotation plan. Use the Team Role Assignment Sheet to capture who owns what.
Availability	What days/times can you meet? When will deliverables be worked on? Use a shared calendar or Google Sheet.

Communication Channels	Will you use email, Slack, Discord, group text? Where will you post updates and documents?
File Sharing and Version Control	Agree on a shared folder (Google Drive, OneDrive, Dropbox) and document naming format.
Meeting Schedule and Cadence	Decide if you'll meet synchronously (Zoom/in person) or asynchronously (chat + comments).
Decision-Making Process	Will you vote? Use consensus? Designate the PM to break ties? Define this in advance.
Conflict Resolution Plan	If a conflict arises, how will it be addressed? Discuss escalation paths early—even if you never use them.

Sample Roles You May Assign

Each team is different, but here are common functional roles used across this course:

Common team roles and responsibilities used in the practicum to support project coordination, technical analysis, communication, documentation, and continuous learning.

Role	Responsibilities
Project Manager (PM)	Organizes meetings, sets deadlines, tracks team progress, keeps the team on schedule
Facilities Lead	Leads research on real estate/location-based decisions
IT Lead	Focuses on technical needs like server requirements and infrastructure capacity
Finance Lead	Builds and validates cost models and projections
Presentation Lead	Designs slides and coordinates the executive briefing
Document Manager	Owns formatting, naming, storage, and submission of files
Reflection Facilitator	Ensures lessons learned and feedback are captured after each milestone

These roles may rotate by milestone or remain fixed. Use what works best for your group size and team strengths.

Tools to Help You Form Your Team

You are provided with two practical tools to support this process:

1. **CBay_Team_Role_Assignment_Sheet.docx**

- A simple worksheet to assign functional roles to individuals
- Use this to avoid ambiguity about who is responsible for each domain

1. **CBay_Project_Process_Planning_Sheet_With_Example.xlsx**

- Helps your team define how you will operate
- Includes space for assigning ownership of key team processes (e.g., communication, quality control)

These tools should be completed as part of your **Week 1 team setup**. Your instructor may collect them, or they may simply serve as internal team contracts.

Team Norms to Discuss

Use the prompts below to build alignment:

- “What does ‘on time’ mean for us?”
- “How will we handle it if someone disappears?”
- “Do we want to rotate the PM role or keep it fixed?”
- “Are we OK giving each other feedback—and how will we do it?”
- “What’s the best way to get unstuck if I don’t understand something?”

These may seem small—but these discussions are what make or break team trust.

Warning Signs of Team Trouble

If your team is experiencing any of the following after Week 2, flag it with your instructor:

- One or two people doing all the work
- Missed meetings or unresponsive teammates
- No shared timeline or file organization
- Avoidance of hard conversations
- Confusion over who’s responsible for what
- All of these are solvable—but only if they’re surfaced and addressed early.

Final Thought

In real life, project success is rarely about just **what** you did. It’s also about **how** you did it—and **who** you did it with.

By investing in your team culture from the start, you’ll not only produce stronger work—you’ll also practice the communication, leadership, and negotiation skills that set great project managers apart.

2: CHAPTER 0 - ROLE OF PM

Chapter 0 – Welcome to the Role of PM (The Setup)

Introduction: Leading Before You're Ready

Most people don't become project managers because they asked to be in charge. They become project managers because something important needs to get done—and someone needs to bring order to the chaos.

This chapter is your dress rehearsal for that moment.

You've been assigned (or thrust into) the Project Manager (PM) role for your team. You haven't delivered a milestone yet. You haven't created a work plan. But what happens next depends on your leadership.

This chapter helps you step into that leadership—before the project even starts.

You'll learn what the PM role actually involves, how to organize your team, how to set up a functional working system, and how to reflect on your own strengths and triggers as a leader.

You'll also use real-world tools like:

- Team Role Assignment Sheet
- Project Process Planning Sheet
- Work Planning Guide
- PBL Framework to understand how to lead under ambiguity

Why This Chapter Matters

Projects don't fall apart because the team lacked intelligence. They fall apart because the team lacked clarity.

This chapter ensures that you and your team:

- Know who's doing what
- Know how you'll communicate
- Know how you'll stay on track
- Have a clear process for when things go wrong

If you skip this step, everything else becomes harder.

What You'll Build in This Chapter

You'll submit foundational planning documents that will guide your team throughout the course:

- Team Role Assignment Sheet
- Project Process Planning Sheet
- Team Work Plan (optional)
- PM Reflection Journal (individual)

These artifacts mirror what real project teams build during early kickoff phases—long before the first deliverable is due.

What Success Looks Like

You'll know you're ready to move on to Chapter 1 when:

- Everyone on your team knows their role
- You have a plan for how to meet, share files, and resolve conflict
- You feel confident taking initiative, even without perfect instructions
- You can describe your own leadership style—and how it shows up under pressure

This is your first experience acting like a PM—not just learning about one.

Let's begin.

[2.1: Welcome to the Role of PM \(The Setup\)](#)

[2.2: Plan of Attack](#)

[2.3: Learning Resources](#)

[2.4: What You Will Submit](#)

[2.5: Reflection and Debrief](#)

[2.6: Submission Checklist](#)

[2.7: Instructor Notes / Evaluation Criteria](#)

This page titled [2: Chapter 0 - Role of PM](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

- [Project Management - A Practicum](#) by Sukhjot "Bob" Singh is licensed [CC BY 4.0](#).

2.1: Welcome to the Role of PM (The Setup)

Scenario Brief: The First Step Forward

Internal Memo

To: Incoming Project Management Practicum Team

From: Sukhjot Singh, Director of IT, C-Bay Inc.

Date: Week 0 – Pre-Initiation Phase

Subject: You Are the Project Manager (Whether You Like It or Not)

Team,

Welcome to your first assignment at C-Bay. Whether you've studied project management before or not, you are now stepping into a role that requires **organization, clarity, communication, and follow-through**.

Let me be clear: **This project cannot move forward without a functioning project manager**. That doesn't mean someone who dictates all the work or has all the answers. It means someone who creates structure when there is none. Someone who helps the team get unstuck. Someone who keeps the team moving.

In the next few weeks, you'll be tackling a major challenge for C-Bay: supporting the expansion of our infrastructure to match rapid growth. But before you begin building models, evaluating locations, or making presentations—you'll need to get your house in order.

That starts with you.

Your Immediate Objectives

As the designated or de facto PM, your short-term goals include:

- Understanding what the PM role is (and isn't)
- Clarifying your team's expectations
- Helping your group align roles, timelines, and deliverables
- Using project planning tools like a WBS, process plan, and charter draft
- Building trust, not control

You'll receive no checklist of exactly what to do. That's part of the simulation. In real life, PMs operate under **uncertainty, limited time, and conflicting priorities**—and they make progress anyway.

You are here to practice that.

The Situation

- You are joining a cross-functional consulting team that has never worked together before.
- The team has been tasked with evaluating C-Bay's infrastructure challenges—but hasn't yet defined how they will work together.
- Some team members are experienced. Others are nervous. A few may be unresponsive or distracted.
- The first project milestone is due soon—but no roles have been formally assigned, and there is no schedule in place.

This is your moment.

Framing Prompts

Use these questions to guide your first steps:

- What do I believe my role as PM is?
- How can I help the team get organized without taking over?
- What tools or documents do we need to establish early clarity?
- What assumptions am I making about what others will do?
- What conversations are we avoiding—and how can I surface them constructively?

What You'll Practice Here

This chapter will give you a safe, supported space to:

- Learn what the role of PM actually involves
- Use professional tools to organize your team (WBS, RACI, process sheets)
- Build the confidence to lead without dominating
- Get used to making decisions without perfect data
- Practice professional communication in writing and in meetings

You don't need to be perfect. You do need to **show up**, take initiative, and keep moving the project forward.

Welcome to the role. It starts now.

—

Director of IT
C-Bay Inc.

This page titled [2.1: Welcome to the Role of PM \(The Setup\)](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

- [2.2.2: Evaluating Portfolio against the Strategic Goals](#) has no license indicated.

2.2: Plan of Attack

Plan of Attack – How to Step Into Leadership (Before the Project Begins)

Becoming the Project Manager isn't about knowing all the answers. It's about knowing how to **start when no one else does**, how to create momentum, and how to build a system that others can rely on. The following Plan of Attack will help you take initiative, get organized, and lead your team into the project confidently—even if you're not 100% sure what to do next.

This section provides you with a **step-by-step strategy** to prepare for Milestone 1 by learning what it means to be a project manager, organizing your team, and setting the stage for effective collaboration.

Step 1: Understand the Role of the Project Manager

Before you can lead, you need to know what the job really is.

Your role is NOT to:

- Micromanage or control your teammates
- Be the smartest or most experienced person in the room
- Do everything yourself

Your role IS to:

- Keep the team moving forward
- Ensure everyone knows what they're responsible for
- Organize, facilitate, and support—not dominate
- Communicate proactively with both your team and stakeholders
- Help the team recover when plans fall apart (they will)

If you need a grounding in PM roles, responsibilities, and mindset, see the Learning Resources section for a quick-start guide.

Step 2: Set Up Your Team for Success

Before you begin any milestone work, your team must establish the basics. Use these prompts and tools to organize your group effectively:

Team startup checklist and supporting tools for establishing roles, communication norms, collaboration processes, and project coordination practices.

Task	Tool or Guide
Choose a team name and finalize members	None required, but team branding builds identity
Assign initial roles (PM, Analyst, Finance, IT, Presenter, etc.)	CBay_Team_Role_Assignment_Sheet.docx

Define how you'll work together: communication norms, file sharing, meeting structure	CBay_Project_Process_Planning_Sheet_With_Example.xlsx
Create a shared folder and agree on file naming	Use Google Drive, OneDrive, or SharePoint
Set your first internal deadline (before the real one!)	Add it to your shared calendar
Agree on your primary communication channel	Slack, Discord, GroupMe, email, or LMS tools

This setup work may feel “administrative,” but it will save your team hours later on. Most project problems aren’t technical—they’re organizational.

Step 3: Review the Project Ahead

Before initiating your project in Chapter 1, take 30–60 minutes with your team to preview what’s coming:

- Read the Initiation Brief from Sukhjit Singh
- Skim the charter template, evaluation matrix, and presentation guide
- Ask: What skills do we already have on the team? What gaps exist?
- Discuss: What’s our biggest concern about Milestone 1?

This is your “pre-mortem”—a chance to surface confusion or gaps before deadlines hit.

Step 4: Practice Decision-Making Without Authority

You may not feel like a “real leader.” That’s normal.

But project managers make decisions **not because they have all the power, but because someone needs to create forward motion**. If you can help your team clarify, focus, and commit—you’re doing the job.

Try these low-risk starter decisions:

- “Let’s all review the charter template by Thursday, and I’ll start a first draft Friday.”
- “Jordan, would you be willing to take point on facilities research?”
- “How about we do a team check-in every Monday morning for 15 minutes?”
- “If someone can’t meet a deadline, let’s agree to communicate 24 hours in advance.”

You’re not telling people what to do. You’re **creating shared clarity**.

Step 5: Reflect Before You Lead

Use these questions to clarify your personal leadership style:

- When do I naturally step up—and when do I hesitate?
- Do I prefer to lead from the front, side, or behind?
- What strengths can I bring to this team beyond task completion?
- What do I need from my team to feel confident in this role?

- What will I do when things go off plan?

Write your thoughts down. Share them with your team if you're comfortable. Self-awareness is your first and most important leadership tool.

Tools You Should Complete Before Chapter 1

Before you dive into the C-Bay project, you should have:

- A completed Team Role Assignment Sheet
- A working Project Process Plan
- An active shared folder with naming system
- Your first internal deadline on the calendar
- A commitment from each team member to the group

This is your soft launch. Get it right now, and everything else becomes easier.

2.3: Learning Resources

Learning Resources – What You Need to Lead with Confidence

Before you initiate any real project work, it's important to ground yourself in the mindset, structure, and tools of project leadership. You don't need to read a textbook cover to cover. You just need the right **starter tools**, delivered **just in time**—the same way a real PM learns on the job.

This section outlines curated, high-impact resources to help you step into your role as a project manager **before Milestone 1 begins**.

1. Project Management Quick Start Reading

If you're brand new to project management or need a refresher, start here:

- **What is a Project Manager?**
 - Learn about the core responsibilities of a PM: organizing chaos, aligning teams, making decisions under uncertainty, and tracking progress.
- **Recommended Reading (Optional but Helpful):**
 - Foundations of Project Management

Goal: Understand what PMs do, why they're needed, and how they guide projects—not just manage tasks.

2. Templates and Documents You'll Use Immediately

These are the tools you will actually use in the next 1–2 weeks. Open them. Discuss them. Customize them.

Key course documents and templates that support team formation, project planning, communication, presentation development, and milestone execution throughout the practicum.

Document	What It Helps You Do
CBay_Team_Role_Assignment_Sheet.docx	Clarifies who is leading what. Use this to assign roles such as PM, Facilities Lead, Finance Lead, IT Lead, and Presenter.
CBay_Project_Process_Planning_Sheet_With_Example.xlsx	Helps your team define how you'll operate: meetings, file sharing, communication norms, deadlines, etc.
CBay_Problem_Based_Learning_Framework.docx	Gives you a philosophical foundation. Explains why the course is structured this way and how to succeed in PBL.
CBay_Executive_Communication_Guide.docx	When you need to translate ideas into executive language. A must-read before your first presentation.

CBay_Slide_Design_Playbook.docx	How to create clean, readable, and professional slides. Avoid rookie mistakes and learn what professionals do.
CBay_Work_Planning_Guide_With_Example.xlsx	Organize your deliverables, assign owners, and set dates before you start the real project.

Each resource includes a blank template **and** a filled-out example to show you what "good" looks like.

3. Instructor and Peer Coaching

Your instructor is not here to micromanage your process—but they are here to coach. Don't wait for them to intervene. Reach out when:

- You feel stuck about how to lead
- Your team is misaligned
- You're unsure how to start a deliverable
- Conflict is emerging in your team dynamic

You may also be paired with a **peer team** for co-review and feedback. These experiences are not "extra." They are how real PMs get better—by learning from and with others.

4. Organizing Your Toolkit

We recommend creating a shared folder now with the following subfolders:

- /Team Charter and Role Plans
- /Meeting Minutes and Notes
- /Draft Deliverables
- /Final Submissions
- /Reflections and Feedback

Use consistent file naming, such as:

CBay__TeamX.extension

Example: CBay_ProjectCharter_TeamB.docx

5. Return to These Often

These resources aren't meant to be "done." They're meant to be **used, revisited, adapted, and improved**.

Strong PMs never stop learning. They check their tools often. They seek out models. They reflect on what they missed last time—and do better next time.

You're not here to complete a template. You're here to become someone who knows what to do when there is no template.

2.4: What You Will Submit

Your First Deliverables as a Project Leader

Before you begin your first milestone in Chapter 1, your team must establish its foundation. This chapter helps you do just that—by stepping into your leadership role and getting your team organized.

In this section, we clarify **exactly what you're expected to produce**, why each deliverable matters, and how each one connects to real-world project management responsibilities.

These are not “schoolwork” tasks. These are the building blocks of your project and your professional development.

Deliverable 1: Team Role Assignment Sheet

File: CBay_Team_Role_Assignment_Sheet_With_Example.docx

Purpose:

To clarify who is leading what across functional areas—so that no task falls through the cracks.

What You Must Include

- Names of team members assigned to each core role (e.g., PM, Finance, IT, Presenter)
- Optional: secondary support roles or co-leads
- Notes or expectations for each role (e.g., timeline owner, formatting lead)

Why It Matters Professionally

Real project teams succeed because people know their roles and take ownership. This document models how roles are defined in kickoff meetings and team onboarding sessions.

Deliverable 2: Project Process Planning Sheet

File: CBay_Project_Process_Planning_Sheet_With_Example.xlsx

Purpose:

To define how your team will operate on a day-to-day basis—before conflict, missed deadlines, or communication breakdowns occur.

What You Must Include

- Your communication tool (Slack, Discord, email, etc.)
- Meeting frequency and team expectations
- Decision-making and conflict resolution methods
- File naming conventions and shared folder practices
- Ownership of team culture (e.g., who facilitates feedback?)

Why It Matters Professionally:

In the workplace, strong teams don't just work together—they operate with intention. This sheet is your contract for collaboration.

Deliverable 3: PM Reflection Journal (Individual)

Optional but strongly encouraged

Format: Short paragraph or bullet list (1–2 pages max)

Purpose:

To help you reflect on what it means to lead before you're thrown into the role under pressure.

What You Might Include

- What leadership means to you
- What kind of PM you hope to be
- What strengths or anxieties you bring into this role
- How you plan to support your team

Why It Matters Professionally:

Great project managers don't just manage tasks—they manage themselves. Awareness of your communication style, triggers, and tendencies will help you lead with empathy and clarity.

Optional Deliverables (Instructor Discretion)

Depending on your instructor's preference, you may also be asked to submit:

- A screenshot of your shared folder setup
- A calendar invite showing your first team check-in
- A copy of your first internal task plan from the Work Planning Guide

These serve as early "proof of readiness" before your project officially begins.

Submission Checklist Summary

Summary of required and optional deliverables to submit for successful completion of the team launch exercise.

Deliverable	Format	Required?
Team Role Assignment Sheet	Word/Doc	Required
Project Process Planning Sheet	Excel/Sheet	Required
PM Reflection Journal	Doc (1–2 pages)	Optional
Shared Folder Screenshot	Image or link	Optional
Calendar Invite	.ics or screenshot	Optional

Submit all required documents to your instructor using the naming convention:

CBay__TeamX.extension

Example: CBay_ProcessPlan_TeamC.xlsx

This page titled [2.4: What You Will Submit](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

2.5: Reflection and Debrief

How Did You Show Up as a PM?

Project managers don't just lead others—they **learn from every decision they make**. The most effective leaders aren't the ones who get it right the first time—they're the ones who **pause, reflect, and adjust**.

This section offers structured prompts to help you **capture what you learned, support your team's growth, and build your professional judgment** as you step into the project management role.

Reflection isn't optional. It's how strong PMs are built.

Individual Reflection Prompts

Answer these in a journal entry, reflection doc, or discussion post (as required by your instructor). Keep your answers honest. You are writing for yourself.

PM Identity

- When I think about the role of PM, what excites me most?
- What intimidates me about being the one “in charge”?
- Do I see myself as a leader—even if no one gave me a title?

First Team Setup

- What part of the team organization process (role sheet, process plan, etc.) felt natural to me?
- What felt unclear or hard to initiate?
- Did I speak up when something needed clarification?

Self-Awareness and Triggers

- What is one habit or trait I noticed about myself during this setup phase?
- What do I do under time pressure: lead, freeze, withdraw, step up?
- What communication moment did I handle well? What would I do differently next time?

Team Debrief Prompts

Schedule a short team check-in (live or async) after completing your planning deliverables. Use these prompts to talk through what's working and what's not.

Team Setup

- What did we do well as a team this week?
- Was there any confusion about roles, expectations, or timelines?
- How did we make decisions—and how did that feel?

Process Ownership

- Which parts of our team process feel strong already?
- Which part might cause tension if we don't address it early?
- Are there any unspoken assumptions we need to surface?

Building Trust

- Did everyone feel included and heard?
- Is there anything we need to do differently to support each other?
- What's one thing we should commit to as a team going into Chapter 1?

Pro Tip: Add your answers to your project folder. They become part of your leadership development portfolio.

Optional: Instructor or Peer Feedback

Your instructor may offer to review your Team Role Sheet or Process Plan. If so, consider asking:

- Is our division of roles realistic?
- Have we overlooked any key areas of collaboration?
- Do our decision-making and conflict strategies align with professional norms?

If peer review is offered, give specific and supportive feedback—just as you'd want to receive.

What Comes Next?

This is your final pause before your project begins. If you've taken time to reflect honestly, then you're already ahead of 90% of new project managers.

The next chapter will ask you to **initiate a project in a high-pressure, ambiguous environment**. But you won't be going in cold—you'll be going in with:

- A shared team structure
- Defined expectations
- The beginnings of your leadership voice

Let's go build something real.

2.6: Submission Checklist

Your Team Ready for Project Launch?

Before your team steps into Chapter 1 and begins solving real business problems at C-Bay, you need to make sure your **foundation is in place**. This checklist will help you perform a **final quality review** of your Chapter 1 deliverables, planning processes, and team alignment.

Every strong project starts with a strong setup.

Team Deliverables – Documents to Submit

Checklist for tracking completion and submission status of all required team launch documents and supporting materials.

Item	Status	Notes
Team Role Assignment Sheet (CBay_Team_Role_Assignment_Sheet.docx)	❖ Complete	❖ Missing
Project Process Planning Sheet (CBay_Project_Process_Planning_Sheet.xlsx)	❖ Complete	❖ Missing
Work Planning Guide (Optional – Strongly Encouraged)	❖ Complete	❖ Missing
PM Reflection Journal (Individual)	❖ Complete	❖ Optional
Shared Folder Setup (Screenshot or Link)	❖ Submitted	❖ Not Submitted
Calendar Invite or Meeting Log	❖ Shared	❖ Not Created

Use the provided naming convention for all files:
CBay__TeamX.extension

Shared Organization Setup

Checklist for verifying shared folder setup, file organization standards, naming conventions, and team access before project work begins.

Setup Item	Status	Notes
------------	--------	-------

Shared folder created (Google Drive, OneDrive, LMS Files tab)	☐ Yes	☐ No
Folder structure follows milestone logic (e.g., /Charters, /Drafts, /Finals)	☐ Yes	☐ No
Internal file naming conventions agreed upon	☐ Yes	☐ No
All teammates have access and editing rights	☐ Yes	☐ No

Team Process Check

Quick readiness check to confirm team communication, decision-making, accountability, and collaboration processes are in place before begins.

Question	Answered?	Notes
Do we know when and how often we'll meet?	☐ Yes	☐ No
Have we agreed on a primary communication channel?	☐ Yes	☐ No
Is everyone clear on who owns what deliverables?	☐ Yes	☐ No
Have we defined how we'll make group decisions?	☐ Yes	☐ No
Have we talked about how we'll handle missed deadlines or conflicts?	☐ Yes	☐ No

Final Readiness Check (Team Review)

Gather your team for a 15-minute pre-submission check-in. Run through this list together:

- Everyone understands their role
- All deliverables are finalized and uploaded
- File names are clean, consistent, and professional
- Your team norms feel realistic and aligned
- Everyone agrees: We are ready to begin Chapter 1

Instructor Notes (Optional)

Your instructor may ask for:

- A brief explanation of how you divided roles
- A screenshot of your planning worksheet

- A short team self-evaluation ("What did we learn from this setup process?")

Check your course LMS or instructions to confirm submission requirements.

Reminder: This is Not Busywork

These tools are not just for grades—they're how real professionals structure their teams. Everything you submit now will be used again, referenced, and adapted as your project evolves.

You're building not just a plan—but a habit of **project readiness**.

This page titled [2.6: Submission Checklist](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

2.7: Instructor Notes / Evaluation Criteria

Transparent Grading Framework for Chapter 1: PM Readiness and Team Setup

Purpose of This Section

Unlike future chapters, Chapter 1 is **not about solving a business problem**—it’s about preparing to lead one. This chapter is meant to simulate what a real project manager would do before any formal work begins:

- Clarify team structure
- Define shared processes
- Plan for communication and accountability
- Reflect on leadership readiness

The goal here is not to “get everything right.” It’s to demonstrate professional **readiness, organization, and self-awareness**.

Suggested Grading Rubric (Instructor Editable)

Rubric for evaluating team readiness, planning quality, collaboration, organization, and professionalism during the team launch phase

Category	Description
Team Role Assignment	Clear documentation of role ownership, with notes on expectations
Process Planning Sheet	Well-defined team norms, tools, and systems for collaboration
Work Plan (Optional Bonus)	Logical task breakdown, timeline clarity, responsibility mapping
Reflection (Individual)	Insightful self-assessment, PM mindset development
Folder/Calendar Setup	Professional organization of shared materials
Team Collaboration & Professionalism	Communication, responsiveness, leadership initiative
TOTAL	

Instructors may adapt this scale depending on how heavily Chapter 1 is weighted in the overall course.

Grading Notes for Instructors

- Focus less on format, more on function: Did the tools create clarity?
- Look for leadership indicators: Who took initiative? Who clarified decisions?
- Encourage team feedback: You may ask teams to rate their setup experience or flag issues early.
- Allow space for improvement: Chapter 1 is foundational. Teams who struggle here can still excel later—with coaching and iteration.

Optional Peer Review Activity

You may optionally ask teams to:

- Swap process planning documents and provide structured peer feedback
- Comment on each other's decision-making strategies or role choices
- Offer suggestions for collaboration norms

Peer Rubric (Optional):

Optional peer evaluation rubric for assessing role clarity, team planning, collaboration readiness, and overall professionalism.

Question	Score (1-5)
Are all major roles clearly assigned?	
Does the team have a realistic collaboration plan?	
Are internal deadlines or escalation paths documented?	
Does this plan feel like it would work in a professional setting?	
Overall clarity and professionalism	

Instructor Feedback Guidance

When giving feedback, focus on these themes:

- What strengths do you see in this team's setup?
- What gaps may cause friction later if unaddressed?
- What does their process reveal about leadership potential?
- What one suggestion would you give to help them succeed in Chapter 1?

Feedback can be given as comments, voice memos, 1:1 check-ins, or through LMS rubrics.

Final Thought

Grading Chapter 1 is less about performance and more about **pattern recognition**. You're observing how students organize, own, and prepare—and giving them the insight they need to improve over time.

This is where leadership begins.

This page titled [2.7: Instructor Notes / Evaluation Criteria](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

3: CHAPTER 1 - PROJECT INITIATION

Introduction: The Moment Everything Begins

You've been hired. You've formed your team. You've set up your process. Now comes the real test: your first professional challenge.

This chapter places you inside a fast-growing company, **C-Bay Inc.**, where infrastructure is cracking under the pressure of expansion. The executive team is counting on you to respond—fast, clearly, and persuasively.

But there's a catch: you don't have all the information. The expectations are vague. The pressure is high. And the decision needs to be made anyway.

This is what **project initiation** feels like in the real world.

What Is Project Initiation?

Project initiation is the phase where a problem becomes a project.

It includes:

- Recognizing the business need
- Forming a project team
- Drafting a **Project Charter**
- Clarifying goals, risks, and constraints
- Getting executive support to move forward

You don't have to solve everything in this phase—but you must set the direction and earn the trust to continue.

In this chapter, you'll **do exactly that**.

What You'll Do in Chapter 1

Your consulting team at C-Bay will:

- Analyze an urgent memo from the Director of IT
- Define your project's goals and constraints
- Evaluate multiple options for physical expansion
- Build a decision matrix and cost estimates
- Write a professional Project Charter
- Present your recommendation to leadership in a 10-minute team briefing

This is your first opportunity to **think like a PM, work like a strategist**, and **present like a professional**.

What You'll Produce

By the end of this milestone, your team will submit:

- A completed **Project Charter**
- A scored and prioritized **Decision Matrix**
- A **Preliminary Cost Model**
- A **Team Presentation** with a clear, persuasive recommendation

These deliverables reflect **how projects are actually launched** in organizations—and they'll become the foundation for everything you do in future chapters.

What Success Looks Like

Success in Chapter 1 means:

- Your team is aligned
- Your decision is supported by logic and structure
- Your charter reflects the project's business purpose
- Your presentation earns executive trust

No one expects perfection. But they do expect clarity, teamwork, and professional polish.

You're not learning about project initiation. You are **doing it**—right now.

Let's begin.

[3.1: Scenario Brief](#)

[3.2: Plan of Attack](#)

[3.3: What You Will Submit](#)

[3.4: Reflection Questions and Lessons Learned](#)

[3.5: Submission Checklist and Final Assembly](#)

[3.6: Instructor Notes / Evaluation Criteria](#)

[3.7: Transition](#)

[3.8: Resource Guide for Student Success](#)

3.1: Scenario Brief

Scenario Brief – C-Bay’s Expansion Crisis

You are about to step into your first professional role—not as a student observing project management theory from a distance, but as an embedded project team member navigating high-stakes decisions under pressure. Your task is not to recite definitions or memorize steps. You are expected to lead.

Welcome to C-Bay Inc., a fast-growing technology company headquartered in Fremont, California. You’ve just been onboarded to a special projects team in the IT division, reporting directly to the Director of IT, Mr. Sukhjit Singh. On your first day, this message lands in your inbox:

Email from: Sukhjit Singh, Director of IT, C-Bay Inc.

Subject: Task 1 – Project Initiation

Team,

First of all, welcome aboard!

Our vision this year requires scaling our IT operations from 36 to over 170 personnel. Our current headquarters cannot support this growth. We must take immediate action to secure a new facility and establish a backup data center capable of housing over 200 servers.

I need your help with three key questions:

1. What are the critical elements for selecting a new building?
2. What locations have you identified and how do they meet our needs?
3. What additional efforts must we launch to make this vision real?

You must also create a preliminary financial model to estimate the long-term costs and help us build support for this proposal at the executive level.

Time is tight. I expect an initial briefing with supporting analysis and a 10-minute presentation within days.

Thanks again for your effort on such a compressed schedule.

— Sukhjit Singh

Director of IT, C-Bay Inc.

There is no detailed checklist. No step-by-step manual. What you have is a complex problem to solve, a team to coordinate with, and high expectations to meet. This is the moment your practicum begins

3.2: Plan of Attack

Plan of Attack – From Confusion to Clarity

You've just received a high-stakes memo from C-Bay's Director of IT. Now what?

You are not given a script or checklist. You are being asked to lead, analyze, and act. The challenge before you is complex and ambiguous, and the stakes are high: this decision will shape the physical and technological backbone of C-Bay for years to come.

This section will help you develop a **Plan of Attack**—a flexible yet structured strategy to organize your thinking, assign roles, and begin building real, professional-grade deliverables.

Step 1: Clarify the Challenge

Before diving into research or drafting presentations, align your team around a shared understanding of the task.

Start by asking these framing questions together:

- What exactly are we being asked to do?
 - (Restate the problem in your own words to ensure clarity.)
- What do we need to know to do it well?
 - (What requirements, constraints, and stakeholder priorities must we uncover?)
- What don't we know yet?
 - (What assumptions are we making that could be dangerous?)
- Where should we start? What comes first?
- Who will lead the work? How will we meet and communicate?
 - (Choose a rotating Project Manager, assign roles, and set up your team process.)

Step 2: Define Your Evaluation Criteria

You cannot choose the right location if you haven't defined what "right" means. Together, create a transparent and weighted **evaluation framework** to compare candidate locations.

Sample evaluation categories might include:

- Facility Capacity (room for growth, number of staff/servers supported)
- Lease Costs or Acquisition Pricing
- Time to Occupancy (build-out, readiness)
- Data Center Capabilities (cooling, redundancy, uptime)
- Location Attributes (proximity to transit, talent pools, risk zones)
- Compliance (ability to meet regulatory/data requirements)
- IT Infrastructure Support (fiber, redundancy, service availability)

Resource – Use This Template:

[CBay_Decision_Matrix_Template_With_Example.xlsx]

This Excel tool lets you organize and weight evaluation criteria, and assign scores to each candidate location. Customize it to match your team's priorities.

Step 3: Analyze the Requirements

Go back to Sukhjot's memo. Highlight everything that qualifies as a **requirement**, **constraint**, or **assumption**. Pay attention to:

Required staff size (170+ employees)

- Server footprint (200 backup servers)
- Growth expectations (multi-year planning horizon)
- Budget sensitivity (financial modeling requested, but cost is not the only factor)
- Timeline constraints (executive briefing is due by Friday)

Group your findings into these buckets:

Framework for organizing requirements, preferences, assumptions, and information gaps before defining project scope and procurement needs.

Category	Examples
Hard Requirements	Number of seats, server capacity, uptime
Soft Preferences	Proximity to HQ, aesthetics, brand
Unstated Assumptions	Access to power redundancy, fiber
Missing Info	Budget caps, lease terms, environmental concerns

You'll likely need to **make reasonable assumptions**. Just make sure they are stated and justified.

Step 4: Assign Roles and Create Your Team Work Plan

You are functioning as a **project team**. Organize yourselves accordingly.

Role descriptions and responsibilities for organizing team members, assigning ownership, and coordinating project work throughout the exercise.

Role	Responsibility
Project Manager	Keeps the team on track, manages timeline, communicates with “executive”
Facilities Lead	Researches and compares candidate buildings
IT Lead	Focuses on server space, power, cooling, and security needs
Finance Lead	Prepares rough cost estimates and budget model
Presenter	Coordinates final presentation (can be a shared role)

[CBay_Work_Planning_Guide_With_Example.xlsx] and [CBay_WBS_Starter_Grid_With_Example.xlsx] – Use this to sketch out your team's work breakdown structure and start forming a basic project timeline.

Step 5: Build the Project Charter

A well-written **Project Charter** is your first professional artifact. It summarizes your mission, scope, key risks, constraints, and success metrics. It will serve as your internal contract and stakeholder communication tool.

Resource – Use This Starter Template:

[CBay_Project_Charter_Template_With_Example.docx] – Pre-filled with headers, formatting, and best practices. Replace the example content with your own based on the C-Bay scenario.

Include in your Charter:

- Background and Business Case
- Project Objectives
- Scope and Exclusions
- Assumptions and Constraints
- Stakeholders
- Success Criteria
- Risks

Step 6: Design Your Executive Briefing

Your audience—senior leaders at C-Bay—expects professional polish. This is not just a classroom presentation. You're presenting a high-stakes recommendation to people whose credibility depends on yours.

Use these two guides as just-in-time learning tools:

[CBay_Executive_Communication_Guide.docx]

Teaches you how to start with your conclusion, present only the essentials, and use your backup analysis as needed.

[CBay_Slide_Design_Playbook.docx]

Gives you layout, font, color, and design guidelines for professional-grade visuals that support—not smother—your message.

Best Practices for Teams

- Keep all your evidence. Every assumption or decision should be traceable to a source (memo, file, interview, market research).
- Revise often. Your first draft is never your final draft—especially for your Charter or Presentation.
- Support each other. Teams that split up work and never reconvene often collapse under pressure. Schedule working sessions.
- Challenge each other's ideas—respectfully. Your job isn't to agree, it's to make the best possible decision.

You're now ready to begin assembling your deliverables and leading your first project milestone. Don't seek perfection—seek clarity, ownership, and momentum.

3.3: What You Will Submit

What You Will Submit – Building Your First Professional Deliverables

You've met with your team. You've clarified the challenge. You've begun assigning roles and sketching a work plan. Now, it's time to create the first milestone deliverables for C-Bay leadership.

This section outlines **exactly what you are expected to produce**—and more importantly, what each deliverable is intended to demonstrate. These are not "busy work" assignments. These are real-world project artifacts, modeled on what professionals would submit to leadership in the first week of a real IT infrastructure project.

Deliverable 1: Project Charter

File Format: Word document

Recommended Starting Point: *Example Project Charter.doc*

Your team's **Project Charter** is the foundational document of your practicum. It defines your project's purpose, boundaries, and stakeholders—and provides a snapshot of your strategy at initiation.

Your Charter must include the following sections:

Required sections and content guidelines for developing a complete project charter, including objectives, scope, assumptions, risks, stakeholders, and success criteria.

Section	Description
Project Background	Why this project matters to C-Bay's growth
Objectives	SMART goals (Specific, Measurable, Achievable, Relevant, Time-bound)
Scope	What's in and out of scope for this phase
Constraints	Budget, time, space, regulatory limits
Assumptions	What you're assuming to proceed without perfect data
Risks	At least 3 risks with brief mitigation strategies
Key Stakeholders	Internal roles (IT Director, PM, Facilities Lead, etc.)
Success Criteria	What will define success for this milestone?

This document should be no more than 2 pages, clear and concise, and written professionally as if it were going to the executive team.

Deliverable 2: Evaluation Matrix with Location Recommendations

File Format: Excel spreadsheet (or Google Sheets)

Recommended Template: *RequirementsAnalysisFramework01122013.xlsx*

Your **Evaluation Matrix** should:

- List at least two potential locations for the new IT headquarters and data center
- Apply at least five criteria that matter to C-Bay (cost, capacity, timeline, etc.)
- Score each location using your team's scoring system (1–5, weighted criteria, etc.)
- Justify the first and second choice selections with notes or annotations

This matrix will act as your decision support tool and must be **referenced** in your presentation (Deliverable 4). Think of it as your evidence table.

Deliverable 3: Preliminary Cost Model

File Format: Excel or slide table

Start with a blank sheet or adapt the Budget tab in your Evaluation Matrix

You are not expected to produce a final budget. But your **Preliminary Cost Model** should include rough estimates for:

Example cost categories for developing a preliminary project budget.

Category	Examples
Facility Costs	Lease/rent, taxes, renovation costs
Infrastructure	Power upgrades, cooling systems, racks
Server Relocation	Transport, setup, downtime
Transition Timeline	Move-in schedule, contingency buffer

Use basic math and clear logic. You may reference public listings or commercial averages. Be transparent about **assumptions**.

Deliverable 4: Team Presentation to Leadership

File Format: PowerPoint (or Google Slides)

Time Limit: 10 minutes (no more than 10 slides)

Support Tools:

- *Designing Effective Slides using PowerPoint.doc*
- *How to Present the 100 Page Report.doc*

Your presentation should:

- Begin with a clear executive summary (the bottom-line recommendation)
- Walk through your evaluation matrix and rationale
- Summarize the cost model and trade-offs
- Outline your recommended next steps
- Demonstrate professional formatting, visuals, and flow
- Include speaking roles for all team members

You may use visuals, maps, or charts—but **avoid dense tables or text** on slides. Let the narrative do the heavy lifting, supported by visuals.

Optional Supporting Deliverables

You may choose to include any of the following, but they are not required for this milestone:

- **Stakeholder Map:** Visual or tabular representation of key roles and their interests/influence
- **Team Work Plan:** High-level timeline, WBS, or RACI chart
- **Communication Strategy Draft:** Notes on how you plan to keep stakeholders informed

These deliverables will be the first entries in your **Project Management Portfolio**. They should reflect not only your understanding of PMBOK principles but your ability to **lead through ambiguity, collaborate effectively**, and **present recommendations with clarity and confidence**.

3.4: Reflection Questions and Lessons Learned

Reflection Questions and Lessons Learned – What Just Happened?

You've completed your first round of deliverables. You've researched locations, created a charter, developed a budget, and presented your findings. You've also—whether you realized it or not—faced some of the **core challenges of real-world project management**:

- Working with limited information
- Making decisions under time pressure
- Managing ambiguity
- Dividing labor within a diverse team
- Justifying trade-offs to skeptical stakeholders

Reflection is where learning crystallizes. This section gives you and your team a space to step back, assess your process, and extract lessons that will inform everything you do going forward.

Individual Reflection Questions

Use these to complete your personal learning journal or submit as part of your milestone reflections.

1. **Where did I hesitate—and why?** What task or moment slowed you down, and what caused that hesitation? Lack of clarity? Confidence? Consensus?
2. **What assumptions did I make?** Were they valid? Identify one or two assumptions you made early in the process. Did they hold up under scrutiny?
3. **What was one contribution I'm proud of?** This could be an idea, a deliverable, a moment of leadership, or a teammate you helped support.
4. **What's one thing I would do differently next time?** Focus not on what went “wrong,” but what you would optimize now that you've experienced this cycle once.

What did I learn about working in a team?

Consider conflict resolution, communication styles, workload balance, or leadership dynamics.

Team Debrief Questions

Block out 20–30 minutes in your next meeting to work through these as a group. Appoint a note-taker and keep your discussion constructive.

1. **What worked well in our process—and why?** Think about planning, collaboration, decision-making, or delegation.
2. **Where did we hit friction—and how did we address it?** Was it timing? Roles? Communication breakdowns? Misaligned expectations?
3. **Did our final recommendation reflect group consensus—or a compromise?** If it was a compromise, did we sacrifice quality or clarity? How did we justify the trade-off?
4. **How did we handle ambiguity and missing data?** What methods (assumptions, stakeholder empathy, industry research) did we use to move forward?
5. **What should we do differently in the next milestone?** Consider your planning approach, internal communication, use of tools, or how you assign roles.

Patterns to Watch For

If you start to notice these patterns early, call them out and adjust:

Common team warning signs and practical actions to address them before they affect project performance.

Pattern	Signal	What to Do
"Someone else will handle it."	Lack of ownership	Clarify roles, rotate leads
"Let's just get it done."	Rushing over analysis	Pause and validate assumptions
"I'm not sure, but I'll wait to speak."	Silent hesitation	Create space for all voices
"This feels like too much."	Overwhelm	Break down into smaller tasks, ask for help
"We all agree, but nothing's moving."	False alignment	Assign a point person with a deadline

Optional Journal Prompt

"This week, I experienced project management not as a concept, but as a challenge. I noticed myself _____. I surprised myself by _____. Next time, I will _____."

Consider turning this into a reflection blog post, internal team Slack note, or part of your Project Management Portfolio.

Reflection doesn't just help you close the loop. It makes your learning **portable**. What you learn here—about ambiguity, collaboration, clarity, and trade-offs—will serve you in every project to come.

This page titled [3.4: Reflection Questions and Lessons Learned](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

3.5: Submission Checklist and Final Assembly

Submission Checklist and Final Assembly – Don’t Just Finish. Finish Strong.

You've done the research. You've made decisions. You've worked through team dynamics and stakeholder expectations. Now it's time to **assemble, polish, and submit** your milestone package for review.

This isn't just about checking boxes. The way you wrap your work reflects your professionalism and attention to detail—both key traits in a project manager.

Use the checklist below to **audit your submission package** before you upload it to your team site or learning management system.

Project Charter – Final Review Checklist

Before submitting your charter, confirm that it:

- Includes a clear, concise project background and business case
- Articulates SMART objectives (specific, measurable, achievable, relevant, time-bound)
- Clearly defines in-scope and out-of-scope items
- Lists constraints and assumptions with rationales
- Identifies at least 3 risks with brief mitigation strategies
- Lists key stakeholders (named roles or titles)
- Defines clear success criteria
- Is no more than 2 pages, uses professional formatting, and includes your team name

Evaluation Matrix – Final Review Checklist

Your evaluation spreadsheet should:

- Compare at least two candidate locations
- Include at least five criteria for comparison (cost, capacity, readiness, etc.)
- Use a consistent and transparent scoring system
- Clearly highlight your first and second choice recommendations
- Include justifications or commentary to support the numbers
- Be clean, readable, and presentable to an executive audience

Preliminary Cost Model – Final Review Checklist

Your financial model should:

- Break costs into logical categories (facility, equipment, personnel, etc.)
- Include realistic estimates, even if rough
- Show transparent assumptions behind each figure
- Use basic formulas and totals (no manual math)
- Include a summary row showing estimated total cost per location
- Be ready to answer: “Where did this number come from?”

Team Presentation – Final Review Checklist

Your slide deck and team presentation should:

- Begin with a clear recommendation in slide 1 or 2
- Reference both your evaluation matrix and cost model
- Be no more than 10 slides, visually clean and well-designed
- Avoid full paragraphs or dense data tables
- Include speaking roles for all team members
- Follow principles from:
 - How to Present the 100 Page Report.doc
 - Designing Effective Slides using PowerPoint.doc
- End with a call to action: “We recommend Site B for immediate consideration.”

Final Assembly – How to Package and Submit

Upload the following **as a single, well-labeled submission package** to your course portal, team site, or instructor-designated system.

Recommended file names and formats for organizing and submitting your final project package

File	Suggested Filename
Project Charter	CBay_ProjectCharter_TeamX.docx
Evaluation Matrix	CBay_EvalMatrix_TeamX.xlsx
Cost Model	CBay_CostModel_TeamX.xlsx (or tab within Eval Matrix)
Presentation Slides	CBay_Presentation_TeamX.pptx
Optional Supporting Docs	CBay_StakeholderMap_TeamX.pdf, etc.

Don’t forget to notify your instructor and/or coach when it’s submitted. Your team will not be graded unless your package is complete and on time.

Common Last-Minute Pitfalls (and How to Avoid Them)

Common submission mistakes and practical strategies to prevent them.

Pitfall	Fix
“Did we all use the same version of the Charter?”	Assign one team member to own final formatting.
“Our slides are missing cost info.”	Rehearse with the matrix and budget side-by-side.
“We forgot to explain how we made assumptions.”	Add footnotes or comments in your Excel sheets.

"We ran out of time to rehearse."	Rehearsing is part of the job. Schedule it.
"One person did all the work."	Debrief, redistribute, and fix for next milestone.

In project work, finishing strong doesn't mean staying perfect. It means you've tested your thinking, refined your output, and delivered with clarity and professionalism.

3.6: Instructor Notes / Evaluation Criteria

Instructor Notes / Evaluation Criteria – Assessing Professional Readiness

This section is intended for instructors, teaching assistants, or peer reviewers who will assess the milestone deliverables produced in Chapter 1. It is also recommended reading for students, as transparency in evaluation criteria supports **self-directed improvement** and **professional accountability**—two core goals of this practicum.

Each deliverable for this milestone has been designed to simulate a real-world project artifact. Evaluation should reflect both **process** (how the team approached the task) and **product** (what they delivered), with attention to communication quality, risk awareness, critical thinking, and team coordination.

Rubric-Based Evaluation (Suggested Weights)

Suggested grading weights for evaluating project deliverables, presentation quality, teamwork, and overall professionalism.

Component	Criteria	Points
Project Charter	Clarity, professionalism, inclusion of all required elements	20
Evaluation Matrix	Relevance and clarity of criteria, logic behind scoring and recommendation	20
Preliminary Cost Model	Transparent assumptions, logical structure, high-level realism	15
Team Presentation	Slide design, content flow, clarity of recommendation, team collaboration	25
Professionalism and Process	Role clarity, collaboration, timeline management, communication	10
Reflection Quality (<i>optional or bonus</i>)	Insightfulness, self-awareness, practical takeaways	10
Total		100

Note: Faculty may adapt this weighting based on time constraints, learning objectives, or individual vs. team emphasis.

What to Look For

Strong Submissions Will:

- Deliver a focused and actionable project charter
- Define decision criteria that are thoughtful and customized to the scenario

- Show a clear comparison between facility options
- Identify and articulate assumptions and unknowns (not hide from them)
- Communicate with a clean, professional visual presentation
- Show evidence of internal peer review (no single-author dominance)
- Exhibit the tone and structure of a real-world executive recommendation

Red Flags Include:

- Copy-paste of the scenario prompt with no synthesis
- Vague or circular evaluation criteria (e.g., "overall fit")
- Lack of justification for cost assumptions
- Presentation is overstuffed, under-rehearsed, or presenter-dependent
- No signs of internal role assignment or project management
- Excessive team imbalance (e.g., one student did all the work)

Feedback Recommendations

Use **process-oriented feedback**, especially in early milestones. For example:

- "Your cost logic was solid, but you buried the recommendation until Slide 9."
- "Nice work applying assumptions—next time, highlight those in the cost tab more clearly."
- "Teamwork appears solid; consider rotating the presentation role for Milestone 2."
- "Evaluation criteria were valid, but not well explained—be sure to define what 'scalability' means in this context."

Frame comments not just for this submission, but as **preparation for future leadership scenarios**.

Faculty Option: Peer Review or Role Simulation

To deepen the learning experience and simulate real stakeholder feedback:

- Assign one team to act as C-Bay's Board of Directors, responding to the presentations
- Require each team to review another team's charter and leave a written review as if they were internal leadership
- Allow students to submit a short "Team Health Check" describing their internal dynamics and learning

This milestone isn't just about selecting a building. It's about learning how to **plan under pressure, justify decisions**, and **communicate with leadership**. Those are the skills that separate project doers from project leaders.

3.7: Transition

Transition – From Vision to Scope

Congratulations—you’ve launched your first milestone at C-Bay. You’ve stepped into a role of accountability, tackled ambiguity, made decisions, and delivered your first set of professional artifacts. In the process, you’ve built foundational skills that every project manager must master:

- Clarifying purpose under pressure
- Leading a team with minimal direction
- Managing trade-offs and incomplete data
- Communicating concisely and persuasively

But initiation is only the beginning.

In the next phase of the project, your focus shifts from the “why” and “where” of the initiative to the “what” and “how.” Specifically: **What exactly will this project deliver? Who needs what, when, and why? And how will you ensure you stay aligned with that definition of success?**

This brings us into one of the most powerful—and risky—phases of project management: **scope definition**.

Where You’re Headed Next: Chapter 2 – Defining Scope and Success

In Chapter 2, your team will:

- Analyze business requirements in depth
- Prioritize and structure those requirements
- Develop a formal Scope Statement
- Identify assumptions, exclusions, and dependencies
- Begin drafting your Work Breakdown Structure (WBS)

You’ll also explore how scope connects to expectations, communication, and stakeholder trust. A poorly defined scope leads to scope creep, budget overruns, and missed deadlines. A well-defined scope creates alignment, clarity, and team confidence.

What You’ll Carry Forward

Make sure you retain the following from Chapter 1:

Key Chapter 1 outputs to carry forward into Chapter 2.

Asset	Use in Chapter 2
Project Charter	Refer to it as your guiding contract and context anchor
Evaluation Matrix	Use as background when discussing project constraints
Team Roles	Reaffirm or rotate responsibilities for the next milestone

Assumptions	Revisit and refine as you learn more from stakeholders
--------------------	--

Closing Thought

Projects fail not because of bad execution—but because of poor definition.

Your ability to define scope isn't just a technical exercise. It's a leadership decision. In Chapter 2, you'll begin proving your ability to translate vision into action.

When you're ready, turn the page. It's time to build the foundation of everything that follows: the scope.

3.8: Resource Guide for Student Success

Resource Guide for Student Success – Chapter 1

This resource guide provides the practical tools and scaffolds you'll need to complete Milestone 1 effectively. These are not templates to be filled in blindly—they are professional frameworks designed to support your thinking, your deliverables, and your growth as a project leader.

Templates and Foundational Tools

Project Planning Templates and Support Resources

Tool	What It Helps You Do
Project Charter Template	Draft a professional-grade charter that defines the purpose, scope, risks, and success criteria of your infrastructure expansion project. Includes clear prompts for each section and formatting guidance.
Decision Matrix Builder	Compare multiple facility options using evaluation criteria such as cost, capacity, and readiness. Helps you structure complex decisions and justify your recommendation with transparency.
Work Planning Guide	Organize your project into logical tasks, assign roles, and sketch a high-level schedule. Encourages clarity of responsibilities and early collaboration around deadlines.
Work Breakdown Structure (WBS) Starter Grid	Begin developing your WBS by grouping work into manageable units. This tool supports milestone mapping and task ownership.
Project Process Planning Sheet	Encourages your team to assign functional leadership (PM, quality, design, etc.) and discuss how process ownership will shape execution. Promotes shared accountability and iterative process design.

Communication and Presentation Support

Presentation and Executive Communication Resources

Tool	What It Helps You Do
Slide Design Playbook	Learn the do's and don'ts of professional slides: clarity, contrast, type size, and layout principles that help your message land. You'll use this to prepare your first team presentation.

Executive Communication Guide	Helps you translate complex research into simple, powerful presentation language. Emphasizes starting with your recommendation, focusing on key drivers, and anticipating executive-level questions.
--------------------------------------	--

Scenario and Planning Framework

Project Scenario and Planning Framework Tools

Tool	What It Helps You Do
Initiation Brief (<i>presented in Chapter 1</i>)	Your first challenge from the Director of IT at C-Bay. This immersive memo defines the urgency, scope, and expectations for your milestone—and launches your team into action.
Milestone Framing Worksheet	Offers a step-by-step structure to move from confusion to clarity. Helps your team plan, delegate, research, and begin drafting deliverables quickly. Acts as your initial project roadmap.

Learning Design and Pedagogical Context

Learning Framework and Course Design Resources

Tool	What It Helps You Do
Problem-Based Learning Framework	Explains the deeper philosophy behind this course. Helps you understand why you are learning through action, iteration, and simulation rather than lecture. Builds a mindset for ownership, judgment, and agency in your work.

Tools You'll Use Throughout

Tools, File Naming, and Submission Standards

Tool	Use Case
Document Editor (Word, Google Docs)	Create your charter and reflection journals
Spreadsheet Tool (Excel, Google Sheets)	Build decision matrices and early cost models
Presentation Tool (PowerPoint, Google Slides)	Create your team's executive presentation
Naming Convention	Use this format for file submissions:

CBay__TeamX.extension	
Example: CBay_ProjectCharter_TeamB.docx	

Optional Skill-Builders (Advanced but Encouraged)

Optional Resources for Advanced Project Planning Skills

Tool	What It Helps You Do
Project Schedule Export Viewer	Explore what a real WBS looks like in a professional schedule format. Great for students who want to practice using MS Project or develop timeline fluency.
Peer Team Process Notes	Review how previous student teams managed roles, meetings, and decision-making. Use this for inspiration, but build your own strategy.

This resource set will expand with each chapter as the project evolves. Don't feel like you need to master everything at once. Use what you need—when you need it—and come back to these tools as your understanding deepens.

This page titled [3.8: Resource Guide for Student Success](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

4: CHAPTER 2 - DEFINING SCOPE AND SUCCESS

Introduction – Defining Scope and Success

Welcome to the second milestone in your journey as a project strategist for C-Bay.

In Chapter 1, you launched the project by creating an initial charter, identifying the core challenge, and responding to urgent infrastructure needs. But now the vision is evolving. C-Bay is planning to enter the loan services market through a franchise-based expansion. Your role is no longer just to start the project—your role is to define how it will operate, scale, and succeed.

Chapter 2 asks you to step into the role of a professional planning team. The stakes are higher. You'll be developing a complete project plan for how to deliver a turnkey franchise package that enables real estate brokers or loan agents to generate \$1 million in annual revenue. That means proposing structure, clarity, and documentation for a system that hasn't been built yet. You're not just planning work—you're planning how to plan.

To do this well, you'll need to understand the real-world mechanics of how:

- Franchising models work (centralized systems, support, and legal structures)
- The real estate industry operates (brokers, listings, transactions)
- Home buying and selling unfolds (escrow, offers, closings, agents)
- Loan processing functions (origination, underwriting, funding)

You will research, synthesize, and then define a franchise system that feels credible, scalable, and professionally sound. This chapter challenges you to propose a strategy without control, build a system without code, and design a business process without direct ownership.

Your final deliverables will include:

- A revised project charter for the franchise initiative
- An executive summary for stakeholders
- A complete project definition and approach (scope, architecture, milestones, structure)

This is the chapter where you stop reacting and start leading. You are no longer simply identifying the problem—you are designing the solution.

Let's begin.

[4.1: Scenario Brief](#)

[4.2: Plan of Attack](#)

[4.3: What You Will Submit](#)

[4.4: Reflection Questions and Lessons Learned](#)

[4.5: Submission Checklist and Final Assembly](#)

[4.6: Instructor Notes / Evaluation Criteria](#)

[4.7: Transition](#)

[4.8: Resource Guide for Student Success](#)

This page titled [4: Chapter 2 - Defining Scope and Success](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

- [2.2.3: MECE Structuring and Component Inventorying](#) has no license indicated.

4.1: Scenario Brief

Scaling the Franchise Vision

To: C-Bay Consulting Team

From: Director of IT, Vision Steering Committee

Subject: Task 2 – Project Planning

Team,

Thank you for the hard work on the first project. You have done a good job producing the first deliverable.

As you know, C-Bay produced \$108.8 million in revenue last year. While this represents solid performance, we have yet to penetrate several key market areas. C-Bay is growing fast—and we're now preparing to expand into the **loan services market** through a **franchise-based model**.

Your next task is to develop a full project plan that will help C-Bay create a **turn-key loan services office** for real estate brokers or loan agents. These franchises must include everything the operating owner needs to generate **\$1 million in gross revenue per year**. We expect to sell **over 1,000 franchises** in Year 1.

Your responsibilities include:

- Documenting the process your team will use to complete this planning task
- Outlining the operational and setup steps C-Bay would take for each franchise
- Creating a timeline (in days or weeks) for each setup step
- Recommending strategies and cost estimates for how C-Bay should manage and scale the setup of 1,000+ franchise location

This is a major initiative for the company. Your work will shape the rollout strategy, internal operations, and growth targets for the entire loan services division.

Deliverables will include:

- An updated Project Charter
- A professional Executive Summary
- A full Project Definition and Approach document

Thank you again for your continued effort and agility under pressure.

— **Vision Steering Committee**

C-Bay Inc.

4.2: Plan of Attack

Plan of Attack: From Charter to Architecture

C-Bay is entering the loan services industry with an ambitious franchise-based growth strategy. Your team is responsible for defining what this expansion looks like—strategically, operationally, and structurally. This milestone is your opportunity to act like a professional project consultant: mapping the business case, defining the project architecture, and delivering stakeholder-ready documentation.

You'll work in five structured phases:

Step 1: Create a Professional Project Charter

Your first task in this milestone is to create a formal **Project Charter** that defines the purpose, boundaries, leadership structure, and success criteria of C-Bay's new loan services franchise initiative.

Treat this like a real stakeholder-facing document. You are not just setting up a school project—you are documenting a multi-million-dollar business expansion that will be reviewed by sponsors, partners, and internal teams.

Use the following structure and prompts to guide your writing:

Stakeholders

List the individuals and groups with a direct or supporting role in the project. Be specific.

Include the project sponsor, executive decision-makers, your internal delivery team, vendors (if applicable), and the intended franchise owners.

Example: C-Bay VP of Business Expansion, Franchise Operations Manager, Project Manager, Legal & Compliance Team, Real Estate Brokers (franchisees)

Problem Statement

Write 2–3 sentences explaining the market gap or challenge C-Bay is trying to solve with this initiative.

Example prompt: C-Bay's current revenue model depends solely on internal real estate auctions. The company has no presence in the loan origination space, leaving value on the table.

Alignment with Business Goals

Explain how this project supports C-Bay's growth strategy. Focus on quantifiable and strategic targets.

Example: This project will help C-Bay diversify its service offerings, create recurring revenue through franchise operations, and expand brand presence into untapped loan services markets.

Project Scope

Clearly define what your team will build, plan, or deliver. Include 3–5 core deliverables or areas of responsibility.

Also name 1–2 major things that are *out of scope* (e.g., regulatory filings, internal lending software development).

*In-scope: Franchise playbook, onboarding system, partner CRM guide.
Out-of-scope: Licensing of loan software, full legal contracting.*

Constraints

List known limitations that shape your plan—time, cost, staffing, legal, or tools. Think practically.

Example: Must be ready to support 1,000+ franchises in Year 1; only 12 weeks available for planning before launch; must integrate with current C-Bay systems.

Success Criteria

Describe how you will measure project success. Include both **hard** (quantitative) and **soft** (qualitative) criteria.

Example: System must enable franchisees to generate \$1M/year; delivery process must scale past 1,000 locations without rework; playbook must pass stakeholder review.

Project Processes

Summarize how your team will organize, validate quality, and manage change.

Example: Weekly checkpoints with sponsor; agile iterations for playbook drafts; use of change log to track scope modifications.

Team & Structure

Define who is doing what. Include project manager, research leads, architecture designers, etc. You may also describe your delivery team structure (e.g., pods, functional leads, centralized model).

High-Level Deliverables

List 3–5 major outputs that your team will produce.

Example: Executive Summary, Project Definition and Architecture, Cost Model, Franchise Setup Timeline.

Deliverables To / Requested From

Specify who needs to approve your deliverables, and who you may need support or data from to complete them.

*Deliverables to: Steering Committee, VP of Franchise Development
Requested from: Finance (cost data), Legal (franchise template), Tech (onboarding systems)*

Sign-Off

Leave a section at the bottom of your document for sponsor approval. Use clear titles and placeholders like:

- Approved by:
- Name/Title:
- Date:
- This may be simulated in your submission or used for peer/instructor sign-off.

When your Project Charter is complete, save and submit it with the filename:
CBay_ProjectCharter_TeamX.docx

Step 2: Write the Executive Summary

Now that your team has scoped the franchise planning project, it's time to translate that scope into a professional **Executive**

Summary. This is your opportunity to clearly communicate the project's purpose, planning strategy, and business value to stakeholders who may not review every detail of your documentation.

Think of this summary as a **high-level leadership brief**. It should be concise, strategic, and persuasive—something the C-Bay COO could present to investors or internal leadership.

Your Executive Summary should include the following sections:

Overview and Purpose

Open with 3–4 sentences describing what the project is and what this summary includes.

Example: “This document presents a strategic plan to launch a scalable, turnkey franchise system offering loan services to C-Bay’s partner brokers and real estate agents. It outlines the project mission, scope, delivery model, risk posture, and success criteria.”

Project Mission

State the mission of the project in one clear sentence.

“The mission of this project is to develop and deliver a repeatable franchise system that enables real estate brokers and agents to generate \$1M per year in loan services revenue.”

Background and Strategic Context

Explain why this project matters now. Link to C-Bay's business growth and market opportunity.

Mention facts like: C-Bay generated \$108.8M last year, yet has not penetrated the loan services sector; expansion will diversify income and meet unmet customer needs.

Objectives and Value

List the project's core objectives across 5 categories:

- Quality: Meet compliance, usability, and documentation standards
- Scope: Deliver full franchise playbook, onboarding guide, support structure
- Schedule: Launch within 10–12 weeks to align with market window
- Team Dynamics: Efficient use of distributed team with vendor support
- Budget: Deliver scalable model under per-unit cost targets

For each, add a bullet with its **strategic value** to C-Bay.

Completion Criteria

Define how you'll know the project is “done.” Include 3–5 measurable milestones:

- All franchise setup documentation delivered
- Pilot location launched and operating
- Operational systems approved by legal and franchise ops
- No critical blockers or open issues at sign-off

Assumptions and Constraints

List the major assumptions your plan depends on—e.g., internal system readiness, vendor availability, timeline support. Then list any known constraints or boundaries (e.g., cost must stay within 5% of plan, timeline within ± 2 weeks).

Stakeholders

Finish with a brief list of who this plan is for:

- C-Bay COO and Franchise Steering Committee
- Franchise Operations and Legal
- Your internal planning and delivery team

When complete, your Executive Summary should stand on its own—meaning it can be read and understood without needing to reference the full plan. Use clear, executive-ready formatting and keep the length to one page.

File name: CBay_ExecutiveSummary_TeamX.docx

Step 3: Build the Project Definition and Approach

This is the core of your planning milestone. In this section, you will document:

- What the franchise package includes
- How C-Bay will deliver the system
- What assumptions or risks shape your design
- How scaling will work across 1,000+ franchises

But before you can define this, you must **understand the business systems involved**. That's why we're including a guided instructional section in this chapter to teach the following foundations:

Instructional Mini-Guides: (Research)

- How the Real Estate Industry Works
 - Broker roles, regulations, and regional variability
- How Buying and Selling a Home Works
 - Steps in a transaction; software and legal process
- How Loan Processing Works
 - Origination, underwriting, approval, closing, money flow
- How Franchising Works
 - Franchise law, systems, support, and scale

Your team should divide up research, learn from the guide(s), and then reconvene to define the C-Bay franchise project structure.

Writing Project Definition and Approach

Our Project Charter and Executive Summary outlined what C-Bay intends to do. Now it's time to define how you will structure, manage, and deliver this initiative in a repeatable way.

In this step, your team will author a professional-grade **Project Definition and Approach** document. This becomes the working playbook for internal project teams, external vendors, and the leadership team overseeing C-Bay's expansion.

Each section below mirrors what professionals include in internal plans and PMO briefings. Follow each prompt and think of this like a document that franchise partners and delivery teams will actually use.

What to Include in Project Definition and Approach

Project Scope

What This Project Will Deliver (Planning Deliverables)

This section provides guidance on how to define the scope of the franchise planning project. The focus is not on building or launching a franchise system, but on developing the planning documentation and frameworks that would enable future implementation.

Start with 1–2 paragraphs that explain what the franchise project covers from a planning perspective.

Separate into:

- Product scope: Define what the future franchise system will include at a high level (e.g., CRM, compliance tools, branding assets). Your role is to outline what should be included—not to develop it.
- Project management scope: Describe what your team is producing to support this vision (e.g., project plan, documentation, architecture concepts, risk register).

Use bullet points to clearly outline what areas are being addressed and where boundaries are drawn.

What This Project Will NOT Deliver

To avoid misalignment, specify what is not part of this planning effort. Clarify that your team is not responsible for actual deployment, technical implementation, vendor contracting, legal sign-off, or franchise operations.

Context and Team Interactions (Planning Model)

Provide a diagram or narrative that shows how the planning effort connects to the larger franchise rollout process. Include key roles such as:

- Stakeholders (e.g., C-Bay COO, Franchise Operations, Compliance)
- Your Planning Team (authors and coordinators of this plan)
- External implementation teams (who will eventually execute the plan)
- Franchisees (end-users affected by this plan, though not part of planning)

Illustrate the flow of communication, review cycles, and approval checkpoints. This helps clarify ownership during the planning stage.

Planning Assumptions

List any assumptions required for planning success. These might include access to internal documentation, availability of stakeholder input, or the assumption that the franchise business model will remain stable throughout the planning period.

Project Management Scope

Explain how the planning process itself will be managed. Describe the use of shared tools, document control systems, team communication methods, and internal review structures. This section should outline how your team will remain coordinated, accountable, and organized throughout the project planning timeline.

Project Architecture

This section provides step-by-step instructions for defining the **Project Architecture** for C-Bay's franchise planning project. Since you are not building the system, your role is to **describe what the system should include, how it should function, and why it is structured this way**—based on the realities of franchising, real estate operations, home financing, and loan servicing.

Understand the Franchise Business Model

Start by writing a short narrative explaining how C-Bay's proposed franchise system will work. This should reflect your understanding of what it means to offer a "turnkey" operation for real estate professionals.

Include:

- What components the franchisor (C-Bay) will provide
- How a franchisee will use the system to operate independently
- What systems, support, and infrastructure will be standardized
- The relationship between C-Bay HQ and the local office

Analyze the Real Estate Industry Context

Describe how the real estate industry functions and what a typical real estate or loan agent needs to succeed. Address:

- Who the key players are (agents, brokers, clients, lenders)
- The role of a brokerage office in daily operations
- Industry-specific tools, compliance needs, and client services

This section helps define **what must be included** in the franchise system to support professionals.

Understand the Home Buying and Selling Process

Provide an overview of the steps involved in a typical real estate transaction. This will help clarify how loan services integrate into the process.

Include:

- The phases of a transaction (listing → offer → escrow → closing)
- Where clients need guidance
- Points of coordination with lenders, title companies, and appraisers
- Typical pain points or service opportunities

Map the Loan Processing Lifecycle

Lay out how a loan progresses from initial application to final approval and funding. This helps define what kind of **systems and support tools** need to exist in the franchise solution.

Cover the following stages:

- Intake and borrower engagement
- Document collection and verification
- Underwriting and structuring
- Approval, compliance, and funding

Describe which of these stages might be supported by CRM tools, templates, automation, or vendor partnerships.

*Submit this section with both a narrative explanation and your conceptual architecture diagram.
This section becomes the structural foundation for your Project Definition and Approach.*

Project Approach

This section outlines how your team will structure, manage, and execute the planning process for C-Bay's Franchise Expansion initiative. You are not building the actual system—you are building a strategic plan. Therefore, your approach should show professionalism, coordination, and structure for how the plan will be developed and delivered.

Describe the Planning Methodology

Start by describing the overall method your team will use to complete the planning project. For example, will you follow a linear phase-based approach? Will you use agile-style iterations? A hybrid model?

Explain:

- Why this model suits a 10-week planning timeline
- How feedback and revisions are built into your process
- How planning milestones are used to organize progress
- How you adapt if stakeholder feedback or project goals evolve

Break Down the Project into Phases

Divide your work into clear, manageable phases. Each phase should have:

- A name
- A goal or deliverable
- A short explanation of what happens in that phase
- How progress is tracked or reviewed

Common phases might include:

1. Research and Discovery
2. Drafting and Outlining
3. Internal Review and Stakeholder Feedback
4. Final Assembly and Submission

Explain Team Roles in the Approach

Describe how your team is structured. Don't use personal names—just functions.

Explain:

- Who is responsible for which tasks
- How leadership is distributed or centralized
- Who coordinates input, feedback, editing, and presentation

Roles might include:

- Planning Lead / Project Manager
- Research and Content Coordinators
- Editors and Document Designers
- Stakeholder Communication Lead (if applicable)

Address How Progress Will Be Managed

Show how your team will manage deliverables and deadlines. Include:

- Tools used to track work (e.g., Trello, shared Google Docs, spreadsheets)
- Frequency of status updates (daily sync, weekly reviews)
- How blockers or delays will be handled
- File version control or change-tracking strategies

Clarify Stakeholder Engagement in the Planning Process

Describe how and when you will engage stakeholders (real or simulated). This could include:

- Peer review checkpoints
- Instructor/institutional feedback
- Role-played sponsor approval rounds
- Simulated presentation opportunities

Make it clear that your team is not planning in a vacuum. A good project approach includes engagement loops and feedback cycles.

Milestones and Deliverables

This section outlines how to define major milestones for your planning project. Milestones are **key checkpoints** that mark meaningful progress. They are **not day-to-day tasks**—each milestone represents a completed phase, major deliverable, or key review event in your project timeline.

Since your team is building a **planning package**—not deploying a franchise system—your milestones will reflect **planning outputs, approvals, and internal reviews**.

Define Your Planning Milestones

Identify 6–8 major milestones across your 10-week timeline. Focus on **when significant planning outputs are completed, reviewed, or approved**.

Examples of planning-related milestones include:

- Completion of the Project Charter
- Architecture Concept Approval
- Risk Register Finalization
- Stakeholder Review or Peer Feedback
- Final Project Plan Submission

Each milestone should be **outcome-based** and tied to a clear document or decision point—not just a team meeting or task update.

Use a Professional Format for Each Milestone

For each milestone, include the following:

- #: The milestone number (e.g., 1, 2, 3...)
- Milestone: A short, clear title
- Originated by: The team role or sub-team that completes the milestone
- For Approval by: The role or simulated stakeholder who will sign off or review
- Completion Criteria: What must be true for the milestone to be marked “done”

Sample Format (Planning Context)

Use the following table structure when listing your milestones:

Sample Table for Milestone and Deliverables

#	Milestone	Originated by	For Approval by	Completion Criteria
1	Project Charter Draft	Planning Team	Instructor (Simulated Sponsor)	Internal review complete and formatted
2	Executive Summary Finalized	Content Lead	Instructor or Peer	Summary approved and stakeholder-ready

#	Milestone	Originated by	For Approval by	Completion Criteria
3	Architecture Overview Approved	Architecture Coordinator	Instructor (Simulated PMO)	Diagram and explanation approved
4	Risk Register Completed	Risk Analyst	Team Lead	All risks and responses documented
5	Stakeholder Engagement Plan	Comms Coordinator	Team Lead	Roles mapped and review timeline confirmed
6	Final Planning Package Submitted	Full Team	Instructor or Evaluator	All deliverables complete and submitted

Milestone Writing Tips

- Use milestone titles that reflect major accomplishments, not small steps.
- Make completion criteria specific and verifiable (e.g., “sign-off received” or “peer-reviewed”).
- Use milestones to communicate sequence and structure—they help your reader understand how your planning effort unfolds.
- Keep the tone professional, as if writing for a stakeholder who will rely on this timeline to monitor progress.

Project Team and Structure

This section outlines how your planning team is organized and how you recommend the future execution team be structured to successfully deliver the franchise system. Think of it as a guide to who is doing what—both in your current planning work and in the eventual franchise rollout.

The goal of this section is twofold:

1. To describe the internal structure of your planning team
2. To recommend a clear operational structure for how C-Bay should staff and manage the delivery of the full project

Define Your Planning Team Roles

Begin by describing how your team is currently organized. This part focuses on how you are building the plan—not how the franchise system will be built.

Include:

- Internal roles and responsibilities
- Who is leading the project effort
- How tasks are distributed (e.g., research, writing, diagramming, editing)
- How collaboration and accountability are maintained

You may write this as a paragraph or use a bulleted role list. No need to include personal names—focus on roles and responsibilities only.

Recommend a Future Project Delivery Structure

Next, define the proposed structure of the **execution team** that C-Bay would use to build and roll out the franchise system based on your plan.

This team structure should reflect the scale of the project (1,000+ franchises) and the need for operational clarity across roles.

Include:

- Executive Sponsor and Steering Committee
- Program Manager or Franchise Operations Lead
- Functional Leads (e.g., Legal/Compliance, Training, IT/CRM, Marketing)

- Vendor or Technology Partners
- Support and Escalation Teams

Describe how these roles will interact, who has final authority, and how coordination will occur between departments or vendors.

Create an Organizational Diagram (Optional but Strongly Recommended)

If possible, include a visual org chart that shows:

- Vertical hierarchy (who reports to whom)
- Lateral relationships (who collaborates or signs off)
- Cross-functional teams (who bridges between areas)

Label all roles clearly and include a caption for your diagram.

Describe Handoff Between Planning and Execution Teams

Conclude this section by describing how your planning team will transfer responsibility to the future implementation team. Highlight:

- What documentation will be handed off
- What guidance, if any, should be provided
- What further clarification or support may be required

This transition guidance ensures continuity and shows leadership thinking.

Submission Format

Submit your completed document as:

CBay_ProjectDefinitionandApproach_TeamX.docx

This document becomes the backbone of your project strategy. Treat it like something real-world stakeholders will read, approve, and use to track your execution.

Step 5: Prepare Deliverables for Submission

By the end of the milestone, your team will submit:

- A completed Project Charter
- A one-page Executive Summary
- A detailed Project Definition and Approach document

Be sure all files are named using your team name and saved in your shared folder for instructor review.

4.3: What You Will Submit

Submission and Delivery

This section outlines exactly what your team is expected to submit at the end of this milestone. Your submissions should reflect the quality and professionalism expected in a real consulting or internal planning environment. These documents are not theoretical—they are designed to support actual implementation planning.

Required Deliverables

You must submit all of the following:

1. **Project Charter**

A leadership-facing document that defines the project's purpose, boundaries, stakeholders, constraints, and success criteria.

File name: *CBay_ProjectCharter_TeamX.docx*

2. **Executive Summary**

A clear, polished summary that introduces the entire initiative in one page. It should be readable on its own, even without access to the full plan.

File name: *CBay_ExecutiveSummary_TeamX.docx*

3. **Project Definition and Approach**

This is the core of your submission and should include:

- Scope of the planning work
- Architecture overview and context model
- Project approach and team structure
- Milestones and deliverables
- Risks, assumptions, and boundary conditions
- File name: *CBay_ProjectDefinition_TeamX.docx*

Optional / Recommended Deliverables

If your team has the capacity and time, these optional additions can elevate your submission and help demonstrate depth of thought:

- A visual stakeholder map or influence diagram
- An annotated architecture diagram with clear data flows and responsibilities
- A peer feedback summary or short team reflection memo on process and collaboration

File Format and Naming Conventions

All filenames should follow this format:

Submit all files in either Microsoft Word (.docx) or PDF (.pdf) format. Do not use Google Docs, Pages, or other formats.

CBay__TeamX.docx

Where is one of: ProjectCharter, ExecutiveSummary, or ProjectDefinition, and TeamX is your assigned team identifier (e.g., TeamA, TeamB, etc.).

Where and How to Submit

All deliverables should be submitted via your course's assigned portal or shared workspace, as directed by your instructor.

Before submission:

- Conduct a peer review within your team
- Ensure all files are final and complete
- Confirm that naming conventions and formatting match the requirements

This page titled [4.3: What You Will Submit](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

4.4: Reflection Questions and Lessons Learned

Reflection Questions and Lessons Learned – What Just Happened?

You've completed the second major milestone in the C-Bay Franchise Planning Project. You created a professional-grade project charter, defined the franchise system's architecture, documented your delivery model, and aligned your strategy with real-world business and industry constraints. More importantly, you built these tools while navigating complexity, ambiguity, and the pressure of stakeholder expectations.

You also deepened your understanding of:

- How real estate, loan processing, and franchising ecosystems operate
- How assumptions shape decision-making
- How to propose structure without full control
- How to translate messy research into actionable planning

This is a moment to reflect. The questions below are designed to help you consolidate your learning and build personal insight.

Individual Reflection Questions

Where did I feel most uncertain in this milestone? Why?

Think about tasks that felt ambiguous, difficult to begin, or hard to finalize.

What part of the process gave me energy or confidence?

Identify one section where you felt most engaged or impactful.

How did my thinking about franchise systems evolve?

What assumptions changed as you researched business models and industry context?

What did I learn about balancing structure with flexibility?

How did you decide when to lock in a decision versus stay open to revision?

What's one way I contributed to clarity or forward movement?

Highlight a contribution that helped your team get unstuck, align, or improve output.

Team Debrief Questions

Use these prompts to lead a team retrospective or roundtable:

What worked in our process—and how can we double down on it?

Where did we feel stuck or unclear—and what got us through it?

Did our deliverables reflect shared ownership—or individual patches?

How did we test our ideas before committing to them?

What do we need to streamline before the next milestone?

Patterns to Watch For

Patterns to watch for

Pattern	Signal	What to Do
"I think this is right, but I'm not 100% sure."	Low clarity	Ask for a second opinion early
"I'll wait for someone else to speak."	Silent misalignment	Run silent polls or round-robin discussion
"Let's just finish this."	Burnout or frustration	Pause and realign with purpose
"We did what we were told."	Compliance over creativity	Reconnect to goals and stakeholder intent

Optional Team Reflection Prompt

"In this milestone, our team learned how to propose a structure without building it. We noticed _____. We learned to trust _____. Next time, we want to strengthen _____."

Use this reflection in a live discussion, journal entry, or Slack recap.

The act of planning is not just about deliverables. It's about learning to manage complexity, hold opposing truths, and turn ambiguity into structured proposals. What you captured here will shape how you lead in your next chapter—and in every project that follows.

This page titled [4.4: Reflection Questions and Lessons Learned](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

4.5: Submission Checklist and Final Assembly

Submission Checklist – Is Your Work Ready?

Before submitting your milestone deliverables, take time as a team to review each component and ensure your work is complete, polished, and submission-ready. Use this checklist during your final team meeting or review session to avoid missing key details.

File Structure and Naming

- All files are named using the correct format: **CBay__TeamX.docx**
- Files are saved in the correct team folder or submission portal
- No placeholder or outdated versions included
- All submissions are clean, final, and properly formatted

Deliverable Review

- Project Charter is complete, scoped, and reviewed
- Executive Summary is clear, concise, and executive-ready
 - Project Definition and Approach includes all of the following:
 - Project Scope (focused on planning, not delivery)
 - Architecture Overview with context diagram
 - Project Approach (team structure, workflow, engagement strategy)
 - Milestones and Deliverables Table
 - Risks, Assumptions, and Boundary Conditions

Professionalism and Polish

- Consistent formatting across documents
- Diagrams are legible, labeled, and integrated with content
- Grammar, punctuation, and spelling are correct
- All documents are peer-reviewed and internally approved

Reflection and Debrief

- Reflection and Lessons Learned section completed
- Individual or team journal responses documented
- Takeaways for future milestones identified and shared

Final Submission Reminder

Upload your milestone deliverables before the deadline. Ensure everything is final, clearly labeled, and accessible. Notify your instructor immediately if you experience any upload issues or document confusion.

This page titled [4.5: Submission Checklist and Final Assembly](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

4.6: Instructor Notes / Evaluation Criteria

Evaluation Criteria

This section is intended for instructors assessing student submissions for Chapter 2 of the C-Bay Franchise Planning Project. It outlines the expectations, evaluation categories, and suggested grading dimensions for this milestone.

Evaluation Scope

The following core deliverables should be reviewed:

- Project Charter
- Executive Summary
- Project Definition and Approach, which includes:
 - Project Scope (focused on planning, not implementation)
 - Architecture Overview and Context Model
 - Project Approach and Team Structure
 - Milestones and Deliverables Table
 - Assumptions, Risks, and Boundary Conditions
- Reflection and Lessons Learned (team or individual)
- Optional additions may include stakeholder diagrams, annotated visuals, or peer feedback summaries.

Core Evaluation Criteria - Suggested

Use the following categories to assess student work. Scores may be adjusted to fit local grading rubrics or weighting policies.

1. Clarity and Structure (20%)

- Is the plan well-organized and logically sequenced?
- Are planning concepts applied with precision and relevance?
- Are transitions and formatting consistent across documents?

2. Strategic Insight and Accuracy (25%)

- Does the submission reflect a solid understanding of real-world systems (e.g., franchising, real estate, loan workflows)?
- Are assumptions, risks, and decisions grounded in research and logic?
- Are planning recommendations feasible and scalable?

3. Professionalism and Polish (15%)

- Are submissions formatted cleanly and consistently?
- Are diagrams clearly labeled and purposeful?
- Is tone professional and free of grammar or style issues?

4. Completeness (25%)

- Are all required documents present and complete?
- Are all sections within each document addressed thoroughly?
- Are file names, structures, and submission standards followed?

5. Reflection and Learning Engagement (15%)

- Do reflections show evidence of self-awareness and process learning?
- Are lessons learned articulated thoughtfully?
- Has the team demonstrated growth between Milestone 1 and 2?

Instructor Note

This milestone simulates professional planning under real-world conditions. Students are asked to define systems they won't build, propose processes they won't run, and design for users they won't meet. Evaluation should reward thoughtful framing, logical structure, and the ability to make decisions in uncertain environments. Strong work will demonstrate not only understanding of the material, but maturity in how teams approach ambiguity, collaboration, and strategic clarity.

4.7: Transition

1.10 Transition to Chapter 3 – From Planning Vision to Costed Action

You've just completed the core architecture of your project plan. In Chapter 2, your team demonstrated strategic thinking, industry fluency, and planning structure by producing:

- A professional-grade Project Charter
- A stakeholder-facing Executive Summary
- A comprehensive Project Definition and Approach that included project scope, proposed system architecture, phased methodology, milestones, and team structure

More importantly, you've moved from an abstract idea to a defined, documented vision for how C-Bay could launch a franchise-based loan services division at scale.

This is no small accomplishment. You've worked across new domains—real estate, loan processing, franchising—and learned to build clarity from complexity. But now comes a new question, one that every real-world project team must eventually answer:

▶ “How much is this going to cost, and how long is it going to take?” ◀

From Strategic Design to Operational Realism

Chapter 3 marks your transition into **execution readiness**. If Chapter 2 was about *what* should be built and *why*, Chapter 3 is about *when* and *how much*. You're entering the financial and logistical layer of project management.

You will now be asked to:

- Create a detailed Project Schedule
 - Map your deliverables, dependencies, and estimated durations using tools like WBS tables, milestone charts, or scheduling grids.
- Estimate the true Costs
 - Consider what it will take to build, deliver, support, and scale your franchise package—people, systems, training, documentation, onboarding, legal, support, and beyond.
- Build a Franchise Rollout Budget
 - Align your proposed schedule and architecture with a clear, defensible budget framework. Show how C-Bay could launch 1,000 franchises without financial chaos.

This is where your team will begin to make hard choices. Do you invest more in automation or more in people? Do you front-load costs to reduce long-term complexity? Do you roll out regionally, nationally, or in test batches?

What Will Be Expected

Chapter 3 will challenge your ability to:

- Think in phases and dependencies
- Quantify assumptions with realistic cost logic
- Make trade-offs between scope, speed, and affordability
- Design a budget that is scalable, transparent, and stakeholder-ready
- Connect numbers to narrative—explaining why your budget and schedule make sense

Your audience is now thinking like CFOs, COOs, and delivery managers. Your documents must speak their language: resource allocation, phase timing, burn rate, and return on investment.

Get Ready for Chapter 3: Estimating Costs and Building the Budget

You're not just building a schedule. You're building trust.

You're not just estimating cost. You're defending feasibility.

In Chapter 3, your plan becomes a financial strategy. Your architecture becomes a rollout timeline. And your assumptions become investment decisions.

Are you ready to turn planning into commitment? Let's begin.

4.8: Resource Guide for Student Success

Resource Guide for Student Success

This resource guide provides the tools and scaffolds you'll need to complete Chapter 2 effectively. This is where your planning shifts from strategic intention to structural clarity. You're no longer just responding to a need—you're defining how C-Bay will deliver a scalable, operational franchise model.

Your job in this milestone is to plan with professional rigor. These tools are designed to help you think through the system architecture, team roles, delivery methodology, and documentation structure. Use them to support your writing, not replace it.

Templates and Planning Tools

Template and Planning Tools

Tool	What It Helps You Do
CBay_ProjectCharter_Template.docx	Draft a formal project charter using structured prompts and planning fields.
CBay_ExecutiveSummary_Guide.docx	Learn how to frame your planning rationale and strategy in a concise, executive-ready summary.
CBay_ProjectDefinition_Framework.docx	Guides you through each section of your main planning document: scope, architecture, milestones, team structure, and more.
CBay_ArchitectureMapping_Guide.pdf	Shows how to structure a conceptual system map, including internal tools, vendor systems, and franchisee interaction.
CBay_MilestoneTable_Template.docx	Provides a table format to list your internal planning milestones, originators, approvers, and completion criteria.
CBay_TeamStructure_Chart.pptx	Create a clean visual of who does what, when, and how roles interact.

Communication and Planning Strategy Tools

Communication and Planning Strategy Tools

Tool	What It Helps You Do
CBay_Scope_Boundaries_Checklist.pdf	Clarify what's in scope, what's out, and where your planning stops. Avoids common misunderstandings.
CBay_Assumption_Risk_Matrix.xlsx	Document the assumptions you're making and what happens if they don't hold. Connects directly to risk planning.
CBay_PlanningApproach_OptionsGuide.docx	Compare different ways to sequence and structure your planning work. Helps you choose a realistic model.

Tools You'll Use Throughout

Tools you will use throughout

Tool	Use Case
Word Processor (Word / Google Docs)	Project charter, executive summary, project definition document.
Spreadsheet Tool (Excel / Google Sheets)	Risk logs, milestone tables, assumption mapping.
Slide Tool (PowerPoint / Google Slides)	Team org charts, architecture diagrams, visual summaries.

File Naming Conventions

Use the following format for every submission:

CBay__TeamX.extension

Examples:

- **CBay_ProjectCharter_TeamB.docx**
- **CBay_ProjectDefinition_TeamA.docx**
- **CBay_MilestoneTable_TeamD.xlsx**

Final Tip

Don't use every tool—use the right ones. Your job is to create a cohesive plan, not fill out a worksheet packet. Ask yourself:

- "What are we trying to communicate here?"
- "Is there a tool that will help us express that with more structure, logic, or clarity?"

These templates are here to help you sound like a project leader, think like a strategist, and deliver like a professional. Use them well.

This page titled [4.8: Resource Guide for Student Success](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

- [2.2.7: Case Study- The Sunken Pipeline](#) has no license indicated.

5: CHAPTER 3- ESTIMATING SCHEDULE, COSTS AND BUILDING THE BUDGET

Estimating Schedule, Costs and Building the Budget

You've scoped the project, mapped the architecture, and defined the delivery strategy. Now it's time to move from concept to execution: turning your planning model into a financially viable, resource-supported roadmap.

This chapter focuses on three core tasks:

- Creating a project schedule with task sequencing, durations, and dependencies
- Estimating costs for all relevant areas (tools, training, staffing, vendor support)
- Building a franchise rollout budget that is scalable, defensible, and clearly justified

What you'll be thinking about:

You will need to consider:

- Human resource allocations and workload
- Tools and platforms required for franchise delivery
- Phased delivery models (e.g., pilots, waves, regional rollout)
- Cost modeling for one-time vs. recurring expenses
- Trade-offs between scope, cost, speed, and quality

You're no longer just answering "What will we build?"—you're answering, "How will we build it, what will it cost, and how fast can we deliver it?"

Welcome to the finance and logistics side of project leadership.
Let's begin.

[5.1: Scenario Brief](#)

[5.2: Plan of Attack](#)

[5.3: What You Will Submit](#)

[5.4: Reflection Questions and Lessons Learned](#)

[5.5: Submission Checklist and Final Assembly](#)

[5.6: Submission Checklist and Final Assembly](#)

[5.7: Transition](#)

[5.8: Resource Guide for Student Success](#)

This page titled [5: Chapter 3- Estimating Schedule, Costs and Building the Budget](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

5.1: Scenario Brief

Briefing

Email

From: Director of IT
Subject: Task 3 – Schedule, Cost Estimation, and Budget Strategy

Team,

We've reviewed your project charter and structural plan for C-Bay's new franchise initiative. Thank you for outlining a compelling delivery strategy and helping us see how the loan services expansion could scale.

Now it's time to pressure-test the plan.

You are now tasked with moving from strategic structure to operational readiness. In this milestone, we need a fully scoped **schedule**, a clear **cost model**, and a defensible **budget framework** for how C-Bay will launch and support over 1,000 franchise locations.

This isn't just a math exercise. It's a leadership challenge.

Your core objectives:

1. **Create a Project Schedule**
 1. Develop a detailed timeline showing what will be delivered, in what order, by whom, and how long it will take. Think in phases. Show dependencies. Align with your architecture and milestone plan.
2. **Estimate Costs**
 1. Identify all relevant cost drivers—staffing, tools, vendor services, training, support, systems. Distinguish between one-time setup costs and recurring operating costs.
3. **Build a Budget Framework**
 1. Propose a scalable budget that C-Bay can use to forecast investment needs. Show how cost per unit, batch rollout, or regional expansion might work. Justify your trade-offs and explain your assumptions.

Deliverables

Your team will submit:

- A structured **Project Schedule** (visual or tabular)
- A cost estimation model showing key inputs and totals
- A professional **Budget Narrative** describing how C-Bay can scale responsibly
- Optional: Budget presentation slides, trade-off matrix, stakeholder prep

This milestone is where your plan gets real. The executive team will want to know: "How long will this take? What will it cost? And can we afford to do this at scale?"

Show them you've thought it through.

—
Vision Steering Committee
C-Bay Inc.

This page titled [5.1: Scenario Brief](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

5.2: Plan of Attack

Plan of Attack: Schedule, Cost Estimation, and Budget

This milestone takes your project from strategic vision to operational readiness. You will now develop a complete project schedule, estimate costs across all relevant dimensions, and build a scalable budget model for the rollout of C-Bay's loan services franchise system.

In this phase, professionalism, clarity, and feasibility matter more than ever. Your stakeholders need more than ideas—they need structure, confidence, and data. Your job is to give it to them.

Step 1: Create a Detailed Project Schedule

A project schedule is not just a list of tasks—it's a structured timeline that guides execution, aligns teams, and enables stakeholders to monitor progress. In this step, your team will create a professional-grade project schedule for C-Bay's franchise rollout, complete with tasks, milestones, dependencies, durations, and role assignments.

This schedule should reflect the logic, structure, and realism of a true implementation plan.

Objectives

Your schedule should enable you to:

- Identify key milestones that mark project phases
- Break those milestones into detailed tasks using a Work Breakdown Structure (WBS)
- Define and document each task in a WBS Dictionary
- Identify dependencies using predecessor logic
- Estimate the duration of each task (in business days or weeks)
- Assign team roles or resources to each task
- Apply scheduling techniques (e.g., Critical Path, float, lag/lead times)
- Create a visual timeline (Gantt chart optional but encouraged)

Step-by-Step Instructions

Define Major Milestones

Start by identifying 5–8 key milestones that structure your project. These are high-level events like:

- “Franchise Playbook Complete”
- “Training Materials Approved”
- “Pilot Franchise Launched”

Each milestone should have a clear outcome and delivery point.

Break Down Each Milestone into Tasks (WBS)

Create a Work Breakdown Structure (WBS) that shows how the work under each milestone is divided. Use levels like:

- 1.0 Franchise Playbook
 - 1.1 Research best practices
 - 1.2 Draft core materials
 - 1.3 Peer review and revision
 - 1.4 Final formatting and delivery

Structure the tasks hierarchically so it's clear what's part of what.

Build a WBS Dictionary

In a second worksheet or tab, define each task using the following fields:

- Task Name
- Description
- Deliverable or Outcome
- Success Criteria
- Assigned Role
- Dependencies
- Notes/Risks

This ensures clarity and prevents confusion later.

Assign Dependencies (Predecessors)

Specify which tasks must be completed before others can begin. This creates a logical flow for the project and supports later Critical Path analysis.

Estimate Task Durations

For each task, estimate the time required in business days or weeks. Use team input, expert judgment, or analogy to prior projects.

Assign Resources or Roles

Assign each task to a responsible role (not just a person). Examples:

- Project Manager
- Training Coordinator
- Vendor Team Lead
- Documentation Specialist

Avoid unassigned tasks. Accountability is key.

Apply Scheduling Logic

Use standard scheduling tools and principles to validate your plan:

- Identify the **Critical Path** (tasks that drive total project duration)
- Calculate **slack/float** for flexible tasks
- Add **lag or lead time** where tasks overlap or have gaps
- Optionally, **baseline** your schedule for future comparison

Format and Finalize Your Schedule

Use a tool like Google Sheets, Excel, ProjectLibre, or MS Project. Your schedule should be formatted clearly, with:

- WBS ID numbers
- Task names
- Start/End dates or durations
- Predecessors
- Roles
- Milestone flags

Include a **Gantt chart** if your tool supports it. Visuals help communicate progress and flow.

Deliverable: Project Schedule

Submit your completed schedule as:

It should include:

CBay_ProjectSchedule_TeamX.xlsx

- WBS task list
- Clearly marked milestones

- Assigned roles
- Task durations or start/end dates
- Dependency logic
- A separate WBS Dictionary tab
- Optional Gantt chart or timeline visualization

This is your operational roadmap. Build it with precision and professionalism.

Step 2: Estimate Project Costs

Once your schedule is complete, the next step is to estimate what it will cost to carry out your plan. Cost estimation translates your strategy into financial reality. A strong cost estimate gives stakeholders visibility into what it takes to build and scale C-Bay's franchise system—and how investment decisions affect outcomes.

Objectives

Your cost estimation should:

- Identify all major cost categories tied to the project scope
- Distinguish between one-time, recurring, and per-unit costs
- Break down costs by project phase or functional area
- Use structured formulas and assumptions in a spreadsheet format
- Provide multiple scaling models (e.g., for 10, 100, and 1,000 franchises)
- Lay the groundwork for your final budget narrative

Step-by-Step Instructions

Open a New Spreadsheet

Name your file: **CBay_CostEstimates_TeamX.xlsx**

Set up your table with these columns:

- Item Description
- Cost Category (e.g., Personnel, Training, Legal, Tools)
- Unit Type (e.g., hour, license, document)
- Quantity
- Unit Cost
- Total Cost (use a formula)
- Notes/Assumptions

Identify Key Cost Areas

Start with broad, high-impact categories such as:

- Personnel (Project managers, trainers, developers, SMEs)
- Training content development
- IT tools/platform licenses
- Vendor services (CRM consultants, onboarding partners)
- Legal/compliance documentation and review
- Support or customer service infrastructure

Estimate Quantities and Rates

For each line item, determine:

- How many units/hours are needed
- The standard rate or cost per unit
- How long the resource will be used
 - Use research, analogies from real companies, or expert judgment.

Build Cost Formulas

Use formulas to compute totals:

$$\text{Total Cost} = \text{Quantity} \times \text{Unit Cost}$$

Group items by category and subtotal each section. Include a grand total at the bottom.

Tag One-Time vs. Recurring Costs

Use a color code or add a column for cost type:

- One-Time Setup (e.g., training development)
- Recurring (e.g., support staff, licenses)
- Per-Unit (e.g., cost per franchisee)

Annotate Assumptions

Use the “Notes” column to explain:

- Where your data came from
- Any uncertainties or ranges
- Planning constraints (e.g., “assumes batch rollout of 100 franchises”)

Run Roll-Up Totals for Different Scenarios

Use separate subtotal rows to show:

- Cost to launch 10 franchises
- Cost to scale to 100 franchises
- Cost to operate at 1,000 franchises
 - This demonstrates scalability and helps leadership compare rollout paths.

Review with Your Team and Adjust

Walk through the entire workbook with your teammates:

- Are all critical costs represented?
- Are there overlaps or missing items?
- Are your assumptions consistent across sections?

Make adjustments as needed for clarity, realism, and completeness.

Deliverable: Cost Estimation Workbook

Submit your spreadsheet as: **CBay_CostEstimates_TeamX.xlsx**

Your final workbook should include:

- Clear structure with labeled rows and columns
- All major cost categories represented
- Totals, formulas, and grouped cost summaries
- Notes and assumptions for transparency
- Scenarios for small-scale, mid-scale, and full-scale rollout
- Professional formatting ready for stakeholder review

Step 3: Build the Budget Narrative and Scaling Plan

Once you’ve built your cost estimate, it’s time to move from spreadsheet to strategy. A budget isn’t just a table of numbers—it’s a story about how your plan turns investment into outcomes. This step challenges you to explain your financial model, justify your assumptions, and demonstrate how C-Bay can scale its franchise system responsibly.

Objectives

In this step, you will:

- Translate your spreadsheet into a readable, professional budget narrative
- Highlight the key cost drivers that shape your plan
- Model different franchise rollout scenarios (e.g., pilot vs. full-scale)
- Justify assumptions with logic and references
- Prepare materials that are presentation-ready for stakeholders

Step-by-Step Instructions

Write a Budget Narrative

Craft a 1–2 page write-up that explains your financial plan. Include:

- Total projected budget and what it covers
- Major cost categories (e.g., staffing, tools, training, support)
- Timeline alignment: how the budget supports the delivery phases
- Cost types: which are one-time, recurring, or per-unit
- Risks, constraints, or uncertainties that may impact cost

Think of this as an executive briefing: professional, concise, and confident.

Justify Key Assumptions

Clearly state 4–6 assumptions that shaped your cost model. Examples:

- “Training costs are centralized and amortized across all franchisees.”
- “Support will be outsourced for the first 100 franchises.”
- “CRM subscription is flat-rated for the first 500 users.”

For each, explain:

- Where the assumption came from (e.g., market research, benchmark, estimate)
- What happens if the assumption changes

Model Rollout Scenarios

Your cost spreadsheet should include comparative models for:

- Pilot Launch (e.g., 10 franchises)
- Mid-Scale Expansion (e.g., 100 franchises)
- Full-Scale Rollout (e.g., 1,000+ franchises)

Include columns for:

- Total cost
- Cost per franchise
- Notes on scalability, risks, and savings opportunities

This helps stakeholders understand the cost trajectory as C-Bay grows.

Highlight Trade-Offs and Strategic Choices

Show where your team made thoughtful decisions:

- Did you invest heavily up front to reduce support long term?
- Did you choose flexibility over cost when selecting vendors?
- Are you staging your rollout to control early investment?

This is where you demonstrate your maturity as project leads.

Format for Executive Review

Write your document using a clean, scannable layout:

- Use section headers and bolded keywords

- Keep paragraphs short and purposeful
- Add white space and optional summary table at the end

File name: CBay_BudgetNarrative_TeamX.docx

Optional: Executive Presentation Slides

If time allows, prepare 3–5 slides that visualize your:

- Budget summary
- Key cost drivers
- Rollout scenario comparisons
- Assumptions and trade-offs

Use clear charts, bold visuals, and simple language.

File name: CBay_BudgetPresentation_TeamX.pptx

This is your chance to translate complexity into clarity. A great budget narrative doesn't just explain costs—it builds trust. Show your audience that your plan is ready to lead C-Bay into scale.

Final Deliverables for Chapter 3

Final Deliverables for Chapter 3

File	Description
CBay_ProjectSchedule_TeamX.xlsx	Full work breakdown and schedule view
CBay_CostEstimates_TeamX.xlsx	Detailed line-item and roll-up cost estimates
CBay_BudgetNarrative_TeamX.docx	Written justification and scaling model
CBay_BudgetPresentation_TeamX.pptx	(Optional) Executive summary of cost and budget plan

You are no longer just project planners. You are now operating like project leads. Deliver work that reflects that standard.

5.3: What You Will Submit

What You Will Submit

This section outlines the final deliverables for Chapter 3. These documents represent the culmination of your strategic planning, resource analysis, and cost modeling work. Your submission should demonstrate professional quality, logical structure, and stakeholder readiness.

Required Deliverables

1. **Project Schedule**

A detailed timeline that includes tasks, durations, dependencies, milestones, and assigned resources.

File name: CBay_ProjectSchedule_TeamX.xlsx

2. **Cost Estimation Workbook**

A complete spreadsheet of cost categories, line-item estimates, one-time vs. recurring costs, and scenario rollups.

File name: CBay_CostEstimates_TeamX.xlsx

3. **Budget Narrative**

A written summary of your financial model, key assumptions, scaling logic, and trade-offs.

File name: CBay_BudgetNarrative_TeamX.docx

Optional (Recommended)

- **Executive Budget Slides**

A clean, concise 3–5 slide presentation summarizing your cost structure, rollout strategy, and stakeholder justification.

File name: CBay_BudgetPresentation_TeamX.pptx

File Format and Submission Tips

- Follow the exact naming conventions listed above
- Upload only finalized, team-approved documents
- Make sure spreadsheet formulas are visible and correctly calculated
- Use folders or shared links if required by your instructor or team lead

5.4: Reflection Questions and Lessons Learned

Reflection and Lessons Learned: What Did We Discover?

You've now delivered a fully scoped, resourced, and costed plan for how C-Bay can launch and scale its new franchise initiative. Along the way, your team had to ask hard questions, assign real numbers to abstract ideas, and make strategic trade-offs under simulated pressure.

This is a moment to reflect. Your ability to understand not just what you did, but how you did it, is what separates task completion from leadership development.

Individual Reflection Prompts

Use these to guide a short journal entry or post-milestone discussion.

What surprised me during the cost estimation or budgeting process?

Did anything cost more or less than expected? Did the act of assigning dollar values change how you viewed the project?

Where did I add the most value to the team this milestone?

~~Was it in modeling costs, visualizing timelines, clarifying scope, or something else?~~

What project management technique or tool felt most natural for me?

Did you connect with WBS creation, spreadsheet modeling, Gantt chart building, or team role mapping?

What's one mistake I wouldn't repeat in the next milestone?

How did it affect your outcome, and how would you handle it differently next time?

Team Debrief Questions

Plan 20–30 minutes to reflect as a team. Capture notes in a shared doc or presentation.

How did we arrive at our estimates—and what were our blind spots?

Did we assume too much, or too little? Did we over-rely on one person or model?

How did we make trade-offs when goals, budget, and scope collided?

What criteria did we use to choose between cost savings and speed? Between quality and scale?

Which planning tools helped us stay aligned and focused?

What should we continue using in the next milestone?

Did our final budget feel realistic and defensible?

Would we stand behind it if presenting to a real C-Bay executive board?

Patterns to Watch

Patterns to Watch

Pattern	Signal	What to Do
"Just fill it in so we can move on."	Task fatigue or tool misuse	Pause and reset expectations on quality
"We'll fix it later."	Deferred uncertainty	Identify the risk and assign someone to resolve it
"One person ends up doing all the math."	Load imbalance	Rotate modeling and schedule tasks across team members

Pattern	Signal	What to Do
"We got numbers but no story."	Missing narrative	Start with the "why" before diving into cells and totals

Optional Journal Prompt

"In this milestone, we turned vision into a plan. I learned that clarity costs effort, but it builds trust. I was challenged when _____. I gained confidence when _____. Next time, I want to contribute more by _____."

Take time to document these lessons—they will serve you long after this class ends.

5.5: Submission Checklist and Final Assembly

Submission Checklist: Is Your Work Ready?

Use this checklist to ensure your Chapter 3 milestone deliverables are complete, consistent, and professionally packaged. Before submitting, take 15–20 minutes as a team to review each component together.

File Readiness

- All files are named using the format: **CBay__TeamX.extension**
- Final versions are saved in the team folder or submitted via the course platform
- No placeholder content or internal drafts included
- Spreadsheets show working formulas and correct totals
- Documents are labeled, consistently formatted, and spell-checked

Deliverable Completion

Project Schedule

- WBS task list is complete and structured
- Milestones are clearly flagged
- Dependencies (predecessors) are listed
- Roles/resources are assigned
- Duration estimates and start/end dates are included
- Optional: Gantt-style timeline view

Cost Estimation Workbook

- All cost categories are broken out
- One-time vs. recurring costs are labeled
- Assumptions and notes are clear
- Scenarios for 10, 100, and 1,000 franchises are modeled

Budget Narrative

- Budget totals are summarized and aligned with the spreadsheet
- Cost drivers, assumptions, and trade-offs are explained
- Formatting is clean and executive-ready

Optional Slide Deck

- Key budget insights are summarized in 3–5 slides
- Visuals support clarity (charts, tables, icons)
- Slides are concise, structured, and polished

Reflection & Debrief

- Individual reflections are completed (if required)
- Team debrief conducted and key lessons documented
- Summary of learning or journal prompt submitted (if assigned)

Final Reminder

Submit all materials before the deadline. If using a shared folder, confirm that access permissions are correct. If uploading to a learning portal, check for confirmation.

Your milestone submission should reflect your team's best thinking, most intentional planning, and highest level of professional execution.

5.6: Submission Checklist and Final Assembly

Instructor Notes and Evaluation Criteria

This section provides guidance for instructors reviewing student submissions for Chapter 3: **Estimating Costs and Building the Budget**. This milestone assesses the student team's ability to convert a structured plan into time-based and financially viable execution pathways. The key dimensions to look for are clarity, logic, practicality, and professionalism.

Evaluation Scope

Submissions to be evaluated typically include:

- **Project Schedule:** timeline, milestones, task sequencing, durations, dependencies, and resource assignments
- **Cost Estimation Workbook:** detailed breakdown of all relevant costs, categorized and subtotaled, with documented assumptions
- **Budget Narrative:** written explanation of cost drivers, justification of scaling model, and framing of trade-offs
- **Optional Executive Slide Deck:** 3–5 slide summary of cost logic, scaling strategy, and financial priorities
- **Reflection and Debrief:** individual or team-based reflection to capture learning, uncertainty, and group process insights

Core Evaluation Criteria (Suggested)

- **Clarity and Structure (20%)**
 - Are spreadsheets and documents clearly labeled and easy to follow?
 - Are assumptions and sources stated transparently?
 - Are naming conventions followed?
- **Scheduling Realism (20%)**
 - Does the project schedule reflect logical task flows, phases, and resource assignments?
 - Are durations and dependencies realistic?
 - Is a WBS Dictionary included and clearly tied to the schedule?
- **Financial Accuracy and Insight (25%)**
 - Are major cost drivers realistic and well-researched?
 - Are one-time, recurring, and per-unit costs correctly distinguished?
 - Are multiple rollout scenarios modeled (pilot, mid-scale, full-scale)?
 - Do totals and subtotals calculate correctly?
- **Strategic Thinking and Trade-Offs (20%)**
 - Do students explain *why* the budget works—not just *what* it costs?
 - Are trade-offs between cost, speed, and quality thoughtfully addressed?
 - Are assumptions tested or acknowledged as risks?
- **Reflection and Learning (15%)**
 - Do student reflections demonstrate insight into what they learned?
 - Is there evidence of self-awareness or growth in understanding cost modeling and resource planning?

Instructor Notes

Strong submissions will reflect **mature project thinking**—not just spreadsheet literacy. Look for teams that:

- Link scheduling and cost logic with their proposed architecture
- Justify their scaling model, not just replicate numbers
- Reflect on what surprised them or where they struggled
- Offer realistic trade-offs or improvements that show ownership of the plan

Encourage students to move beyond “filling out forms” and toward **telling a clear, defensible story** of how this budget could

actually work in a real organization like C-Bay.

This page titled [5.6: Submission Checklist and Final Assembly](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

5.7: Transition

Chapter 3 – Transition to Chapter 4: From Planning to Risk Management

You've built the schedule. You've scoped the costs. You've justified your budget, structured your scaling model, and learned to communicate your plan with clarity and professionalism.

This is the moment where your planning becomes strategy.

But even the most robust plans encounter change, uncertainty, and disruption.

What Comes Next: Chapter 4 – Identifying Risks and Planning for Change

Chapter 4 challenges you to move beyond control into **contingency**. Every large-scale rollout—especially one involving franchising, training, technology, and compliance—comes with risk.

In the next milestone, you will:

- Build a **Risk Register** that identifies threats across people, process, and technology
- Propose **mitigation strategies** and fallback options
- Identify what could disrupt your timeline, budget, or stakeholder relationships
- Develop a plan for how to respond when things don't go according to plan

You'll be asked to step into the mindset of a strategist, not just a planner.

- What if your vendor under performs?
- What if your onboarding system breaks at scale?
- What if state regulations change mid-rollout?
- What if stakeholder buy-in begins to slip?

You'll answer these questions by building proactive systems—not reactive excuses.

What You'll Deliver in Chapter 4

- A full **Risk Breakdown Structure (RBS)** and **Risk Register**
- A narrative outlining your risk strategy, assumptions, and backup plans
- A team process for monitoring, escalating, and addressing project risks
- Optional: Visual models of impact likelihood and response planning

You've built the system. Now it's time to protect it.

Welcome to Chapter 4: **Identifying Risks and Planning for Change**.

5.8: Resource Guide for Student Success

Resource Guide for Student Success

This guide includes the tools, templates, and scaffolds you'll need to complete Chapter 3: **Estimating Costs and Building the Budget**. Each resource is designed to help you create a realistic, scalable, and stakeholder-ready plan.

Planning and Execution Tools

Planning and Execution Tools

Tool	Purpose
CBay_ProjectSchedule_Template.xlsx	Create a detailed project timeline with tasks, durations, dependencies, and assigned resources. Includes WBS starter format and optional Gantt chart support.
CBay_WBSDictionary_Tab.xlsx	Use this tab in your schedule file to describe each task: scope, deliverables, owner, success criteria. Helps maintain clarity and accountability.
CBay_CostEstimation_Workbook.xlsx	Breaks down cost categories and includes formulas to calculate line-item, subtotal, and scenario-based estimates. Designed for pilot, mid-scale, and full-scale rollouts.
CBay_Assumptions_Log.docx	Track cost and schedule assumptions in a format you can reference or submit. Supports transparency and defensibility of your decisions.

Budget Narrative and Presentation Support

Budget Narrative and Presentation Support

Tool	Purpose
CBay_BudgetNarrative_Template.docx	Framework to help structure your cost drivers, budget strategy, trade-offs, and scaling model in narrative form.
CBay_BudgetPresentation_Slides.pptx	Slide deck template to summarize your key estimates and defend your strategy to stakeholders. Ideal for executive briefings.
CBay_CostDriver_CheatSheet.pdf	Quick-reference guide of common planning and operational cost elements. Use it to brainstorm categories and avoid missing major items.

Tools You'll Use Throughout

Tools You'll Use Throughout

Tool	Use Case
Spreadsheet Tool (Excel / Google Sheets)	Cost modeling, scheduling, scaling projections, scenario modeling
Word Processor (Word / Google Docs)	Budget narrative, assumption log, reflections
Slide Tool (PowerPoint / Google Slides)	Budget presentations and stakeholder summaries

Naming Convention

Use the following format when saving and submitting files:

CBay__TeamX.extension

Examples:

- CBay_ProjectSchedule_TeamB.xlsx
- CBay_CostEstimates_TeamC.xlsx
- CBay_BudgetNarrative_TeamA.docx

Pro Tip

You don't need to use every tool—but you do need to choose the right ones. Start by asking:

- What are we trying to model or communicate?
- What will make this easier for a stakeholder to understand?

Use tools that help you think, explain, and present—not just fill in boxes.

Deliver with precision. Lead with clarity. Think like a builder.

6: CHAPTER 4 – IDENTIFYING RISKS AND PLANNING FOR CHANGE

Introduction: Identifying Risks and Planning for Change

You've built the strategy. You've scoped the work. You've costed and scheduled the plan. But no project plan is complete until you've asked:

What could go wrong?

Why Risk Management?

This chapter introduces you to the vital discipline of **risk management**. Your role now shifts from planning execution to anticipating and preparing for uncertainty. As the C-Bay franchise initiative scales, your team must be ready for everything from resource conflicts to technology glitches to vendor issues and regulatory delays.

Risk management isn't about fear—it's about foresight. It's what distinguishes good plans from resilient ones.

What You'll Learn

In Chapter 4, you will:

- Build a Risk Register that identifies threats across people, process, systems, and vendors
- Assess each risk's likelihood and impact
- Propose clear mitigation strategies and contingency plans
- Visualize risks and responses for stakeholder review
- Communicate risk with clarity, logic, and urgency

Core Concepts You'll Explore

- What makes something an actionable risk vs. just an uncertainty
- How to differentiate mitigation (reduce likelihood) from contingency (prepare for impact)
- How to track risk ownership, escalation paths, and resolution processes
- How to embed risk thinking into project phases—not just in a separate document

Your Evolving Role

This milestone marks your transition from project *planner* to project *strategist*. You are no longer just documenting the plan—you're **designing a system that survives change**.

Because in real-world projects, it's not just about building a great roadmap—it's about **adapting it under pressure**.

Welcome to Chapter 4: **Identifying Risks and Planning for Change**.

[6.1: Scenario Brief](#)

[6.2: Plan of Attack](#)

[6.3: What You Will Submit](#)

[6.4: Reflection Questions and Lessons Learned](#)

[6.5: Submission Checklist and Final Assembly](#)

[6.6: Instructor Notes / Evaluation Criteria](#)

[6.7: Transition](#)

[6.8: Resource Guide for Student Success](#)

This page titled [6: Chapter 4 – Identifying Risks and Planning for Change](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjīt "Bob" Singh.

6.1: Scenario Brief

Scenario Brief

Email

From: Director of IT

Subject: Task 4 – Risk Planning and Change Management

Team,

Thank you for producing a detailed budget and scalable implementation plan for C-Bay's national franchise rollout. Your documentation has positioned us to move forward with clarity—but we now need to pressure-test this plan before we commit to execution.

Your next assignment is to conduct a **risk and control assessment**. Your team will serve as the project's **Risk and Resilience Unit**. You'll identify key vulnerabilities in the franchise initiative and define mitigation strategies to ensure our timeline, budget, scope, quality, and team performance remain protected and adaptable.

New Requirement: Implementing Project Controls

In addition to identifying risks, your team must recommend and document **project control mechanisms** for each of the five foundational pillars of project success:

- Scope: How do we monitor and control changes to scope creep or scope loss?
- Schedule: What tools or checkpoints will ensure deadlines remain visible and realistic?
- Budget: How will cost deviations be tracked and addressed in real time?
- Quality: What standards and review processes will safeguard the integrity of deliverables?
- Team: How will we track team health, workload balance, and collaboration challenges?

Each control you recommend should include a clear **monitoring plan** that explains how its effectiveness will be evaluated during project execution.

Your Deliverables Must Include:

- A detailed Risk Register (10–15 defined risks, categorized)
- Risk metrics for likelihood, impact, and ownership
- A heat map or matrix to visualize relative risk severity
- A Control Plan addressing mitigation and monitoring strategies for all five pillars
- A brief narrative explaining your overall risk and control philosophy
- Optional: escalation protocols, team risk playbooks, or proactive warning systems

You are not expected to eliminate all risk.

Your role is to **anticipate, plan, and monitor**—to show that this plan can bend without breaking.

Your submission will be used to guide the executive go/no-go decision.

Treat this milestone like a boardroom defense.

—

Vision Steering Committee

C-Bay Inc.

This page titled [6.1: Scenario Brief](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

6.2: Plan of Attack

Plan of Attack: Risk Management and Control Planning

In this milestone, your team will shift from strategic design to resilience strategy. You've scoped, scheduled, and budgeted the project—now it's time to test its strength.

Chapter 4 challenges you to create a comprehensive **risk management framework** and to define **control mechanisms** for each of the five pillars of project performance:

- Scope
- Schedule
- Budget
- Quality
- Team

Your goal is not just to prevent failure, but to prepare your plan to withstand and respond to change.

Key Objectives

By the end of this milestone, you should be able to:

- Identify and rank meaningful risks that could impact project execution
- Propose targeted mitigation and contingency strategies
- Define control mechanisms that monitor and maintain the integrity of your scope, schedule, budget, quality, and team cohesion
- Establish a system for monitoring the effectiveness of each control over time
- Present your strategy in a clear, structured, and stakeholder-ready format

Step-by-Step Plan

Identify Risks

Brainstorm and document 10–15 risks that could threaten success across categories: people, process, tools, stakeholders, or external environment. Use a **Risk Breakdown Structure (RBS)** or affinity map to guide your thinking.

Assess and Score Risks

Use a 1–5 scale for both **Likelihood** and **Impact**. Multiply these scores to calculate **Risk Priority**. Assign a risk owner for each item.

Build a Risk Register

Create a structured table or spreadsheet that includes:

- Risk Description
- Category
- Likelihood
- Impact
- Priority Score
- Owner
- Mitigation Strategy

- Contingency Plan

Visualize with a Heat Map or Matrix

Summarize your register with a **color-coded heat map** or a quadrant matrix. This helps stakeholders quickly spot high-risk areas that need attention.

Define Control Strategies for the 5 Pillars

In this step, your goal is to identify how your team will maintain stability across the five foundational pillars of project success: **Scope, Schedule, Budget, Quality, and Team Dynamics**. Each control strategy should be designed not only to detect problems but to prevent them—and to guide corrective action when risks materialize.

Follow these instructions for each pillar:

Identify What Needs to Be Controlled

Start by clarifying what specific outcomes or behaviors must be protected for this area. For example:

- In Schedule, it's milestone completion on time.
- In Budget, it's not exceeding forecasted costs.
- In Scope, it's limiting unapproved expansion.

Ask:

“What could go wrong here?”

“What must stay consistent for this project to succeed?”

Design a Control Mechanism

Create 1–2 specific actions, tools, or checkpoints that your team will use to stay in control. Examples include:

- Dashboards or trackers
- Approval workflows
- Weekly review meetings
- Automated alerts or reports
- Issue logs and audit trails

The control must be:

- Visible (easy to track)
- Actionable (something you can respond to)
- Owned (assigned to someone on the team)

Document Monitoring Strategy

Controls are only effective if you monitor them. For each control:

- Define what metric will be reviewed
- Specify how often it will be reviewed (daily, weekly, per milestone)
- Assign who is responsible for monitoring
- Explain what happens if the control shows failure or slippage

Example:

“The schedule tracker will be reviewed weekly by the PM. Any task more than 3 days late will trigger an escalation to the core team.”

Connect Controls to Risk Triggers

Where relevant, link each control to the risks it helps mitigate. Show stakeholders how your controls are not just compliance tasks—they are **risk absorbers**.

Example:

“Our scope review checkpoint helps prevent the risk of unplanned features delaying training delivery.”

Review and Refine Across Pillars

Once all five areas are defined, step back and ensure:

- The control strategies are not duplicative or in conflict
- The frequency of monitoring is realistic and sustainable
- Ownership is clearly distributed across your team

Controls should act like a dashboard—not an emergency manual.

Document your full control plan in a matrix format or narrative, organized by pillar. Include this in your submission alongside the risk register and heat map.

Propose a Monitoring Strategy

For every control, define:

- What metric or data point signals success/failure
- How often the control is reviewed
- Who is responsible for measuring and reporting
- What happens when a control fails

Write a Risk and Control Narrative

Summarize your strategy in a 1–2 page write-up. Focus on:

- Your team's philosophy toward risk and control
- The biggest risks and how you're mitigating them
- How your controls enable the project to be proactive, not reactive
- Why this approach builds stakeholder confidence

Final Deliverables

- Risk Register (Excel or Word)
- Risk Heat Map or Matrix (Excel, PowerPoint, or graphic tool)
- Control Plan covering all five pillars
- Risk and Control Narrative (Word document, 1–2 pages)
- Optional: Escalation matrix, risk dashboards, or team protocol guide

6.3: What You Will Submit

What You Will Submit

Your team will submit a complete **risk management and control planning package** for Chapter 4. These deliverables will demonstrate your ability to anticipate potential disruptions and define systems for monitoring and maintaining stability across all five pillars of project performance: **Scope, Schedule, Budget, Quality, and Team**.

Required Deliverables

Risk Register

A fully populated risk log with 10–15 risks. Each entry should include:

- Risk category
- Likelihood and impact scores
- Priority score ($L \times I$)
- Risk owner
- Mitigation and contingency plans
- File name: **CBay_RiskRegister_TeamX.xlsx**

Risk Visualization (Matrix or Heat Map)

A clear visual model showing the distribution of risks by severity. This can be in:

- Excel
- Google Sheets
- PowerPoint or diagram format
- File name: **CBay_RiskMatrix_TeamX.xlsx** or **CBay_RiskMap_TeamX.pptx**

Control Strategy Matrix or Narrative

A structured matrix or short document outlining your control strategy across the five project pillars. Each control should include:

- Control name and purpose
- Monitoring frequency
- Assigned owner
- Escalation protocol
- File name: **CBay_ControlPlan_TeamX.docx**

Risk and Control Narrative

A 1–2 page summary describing your team's overall risk philosophy and control approach. Include:

- Key risks you prioritized
- Why your controls matter
- How monitoring will happen
- File name: **CBay_RiskNarrative_TeamX.docx**

Optional (Recommended)

Executive Stakeholder Slides

A 3–5 slide summary of your risk register, top controls, and biggest concerns. Great for use in presentations or simulations.

File name: CBay_StakeholderSlides_TeamX.pptx

Escalation Protocol

A short flowchart or table describing how risks and failures are escalated to the appropriate team member or sponsor.

File name: CBay_EscalationProtocol_TeamX.docx

Submission Tips

- Use this file naming convention: **CBay__TeamX.extension**
- Upload all files to your team's folder or LMS portal
- Double-check formulas, visual clarity, and versioning
- Submit only your polished, final work

6.4: Reflection Questions and Lessons Learned

Reflection & Lessons Learned

This section gives you and your team the opportunity to reflect on the risks you uncovered, the controls you designed, and how your thinking evolved throughout this milestone. Strong teams pause to understand not just what they did—but how they made decisions and grew together.

Individual Reflection Prompts

Use these prompts to guide a journal entry or a brief self-evaluation:

- What surprised me most about building the risk register or defining controls?
- What risk or control area did I feel most confident working on—and why?
- How did my understanding of resilience or uncertainty evolve?
- What's one technique I would use again in a real project?
- What's one thing I would change about how our team handled this milestone?

Team Debrief Questions

Plan 20–30 minutes to reflect as a group. You may wish to document this discussion in your team notes or reflection log.

- Which risks were the hardest to define or score accurately?
- Did we encounter disagreements when identifying control strategies?
- What did we learn about assigning ownership and accountability?
- Were our controls realistic to monitor?
- What patterns should we watch for in future milestones (e.g., missed risks, unclear roles, duplicate efforts)?

Patterns to Watch

Patterns to Watch

Pattern	Signal	What to Do
"This seems minor."	Underestimating risk	Reassess using impact/likelihood framing
"Someone else will track it."	Missing ownership	Assign specific names, not just roles
"We don't need a fallback."	False sense of certainty	Always document a contingency plan
"Let's just document and move on."	Lack of engagement	Pause and ask: "What could go wrong?"

Optional Journal Prompt

"In this chapter, we planned for what could go wrong. I learned that resilience requires structure, not guesswork. I felt challenged when _____. I felt prepared when _____. In future projects, I will apply _____."

This page titled [6.4: Reflection Questions and Lessons Learned](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

6.5: Submission Checklist and Final Assembly

Submission Checklist and Final Assembly

Use this checklist to ensure your **risk and control management deliverables** are complete, organized, and ready for review. Review each item as a team before submitting.

File Readiness

- Files are named using the format: **CBay__TeamX.extension**
- Final versions are saved in your team's submission folder or shared drive
- No draft or duplicate versions included
- Spreadsheets include working formulas and clear labels
- Documents and slides are formatted, titled, and free of typo

Required Deliverables

- Risk Register (10–15 risks, scored, categorized, with owners)
- Risk Matrix or Heat Map showing priority and severity visually
- Control Plan covering scope, schedule, budget, quality, and team
- Risk and Control Narrative summarizing strategy and justification

Optional (Recommended)

- Stakeholder Slide Deck (3–5 slides summarizing risks, controls, and strategy)
- Escalation Protocol with flowchart or table for unresolved issues
- Bonus visuals (dashboards, logs, workflows) if useful to stakeholders

Final Quality Checks

- All team members have reviewed the final package
- At least one peer provided feedback before submission
- Files are submitted to the correct location and access is confirmed

This checklist ensures you're submitting not just documents—but **professional, defensible deliverables** that demonstrate foresight, structure, and clarity.

6.6: Instructor Notes / Evaluation Criteria

Chapter 4 – Instructor Notes & Evaluation Criteria

This milestone assesses the student team's ability to anticipate, structure, and prepare for uncertainty in a complex implementation environment. Risk and control management are indicators of mature project thinking and should demonstrate clarity, defensibility, and alignment with earlier planning efforts.

Evaluation Scope

Expected submissions:

- Risk Register (scored, categorized, with assigned owners)
- Risk Matrix or Heat Map (visual representation of priority)
- Control Plan for all five pillars: Scope, Schedule, Budget, Quality, and Team
- Risk and Control Narrative summarizing strategy and control philosophy
- Optional: Stakeholder Presentation Slides and Escalation Protocol

Evaluation Criteria (Suggested)

1. Clarity and Professionalism (20%)
 1. Are documents labeled, well-structured, and easy to navigate?
 2. Are risk and control data points clearly explained?
 3. Are visualizations legible and appropriate?
2. Risk Structure and Depth (25%)
 1. Are risks thoughtful and tailored to C-Bay's franchise context?
 2. Do scores reflect genuine differentiation and insight?
 3. Are risk owners logically assigned?
3. Control Design and Coverage (25%)
 1. Are controls specific, actionable, and matched to key risks?
 2. Do controls include ownership, frequency, and escalation logic?
 3. Is each pillar adequately addressed?
4. Narrative and Leadership Framing (20%)
 1. Does the team communicate purpose and strategy—not just documentation?
 2. Are trade-offs, assumptions, or priorities clearly explained?
 3. Would this narrative instill confidence in a stakeholder?
5. Reflection and Team Learning (10%)
 1. Do reflections show individual and collective insight?
 2. Does the team address what they would improve, reinforce, or rethink?

Instructor Notes

Look for depth over quantity. A short but thoughtful Risk Register, paired with a well-written narrative and practical control plan, is more valuable than a bloated set of files.

Strong teams will:

- Use simple tools effectively
- Frame their control systems as proactive leadership, not reactive compliance
- Show signs of team growth in the way they approached and evaluated uncertainty

This milestone offers an excellent coaching opportunity for strategic thinking, systems awareness, and stakeholder empathy.

This page titled [6.6: Instructor Notes / Evaluation Criteria](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

6.7: Transition

Chapter 4 – Transition to Chapter 5

You've done more than just build a plan. You've built a safety net.

Chapter 4 challenged you to think like a strategist, not just a scheduler. You anticipated uncertainty, implemented proactive controls, and practiced the mindset of a resilient project leader. Now, you'll take that foresight and apply it to the critical execution phase of the C-Bay project.

What Comes Next: Chapter 5 – Executing and Monitoring the Project

In Chapter 5, your role shifts once again—from architect to operator.

This milestone will guide you through leading a simulated project rollout. You'll monitor progress, respond to real-time challenges, and practice interpreting data as a project leader.

You'll also:

- Track deliverable completion across project phases
- Apply Earned Value Management (EVM) to evaluate cost and schedule performance
- Monitor quality, costs, and team bandwidth
- Simulate mid-project status reports and stakeholder briefings

While risk and control planning prepared you to defend the project, execution will test your ability to **lead it forward**. This chapter asks: can you deliver while adapting in motion?

What You'll Produce

- Execution dashboards
- Project status reports with performance indicators
- Stakeholder briefing summaries
- Optional: peer decision logs, reflection notes, and live simulation recaps

You've planned with precision. Now it's time to lead with confidence.

Welcome to Chapter 5: **Executing and Monitoring the Project**.

6.8: Resource Guide for Student Success

Guides and Tools

This guide provides tools and templates to help you complete Chapter 4: **Identifying Risks and Planning for Change**. These resources are designed to help you identify key risks, propose mitigation strategies, implement project controls, and document your process.

Risk and Control Tools

Risk and Control Tools

Tool	Purpose
CBay_RiskRegister_Template.xlsx	Build a structured risk register including fields for description, category, likelihood, impact, owner, and mitigation/contingency plans.
CBay_RiskMatrix_Template.xlsx	Create a heat map or severity matrix that helps you prioritize risk response by visualizing likelihood and impact.
CBay_ControlPlanning_Guide.docx	Step-by-step instructions and examples for implementing controls across the five project pillars (scope, schedule, budget, quality, and team).
CBay_ControlMatrix_Template.xlsx	Use this matrix to document each control, including monitoring frequency, ownership, and response strategy if the control fails.

Writing and Framing Support

Writing and Framing Support

Tool	Purpose
CBay_RiskNarrative_Template.docx	Helps you write a 1–2 page summary of your team's risk strategy and control philosophy.
CBay_EscalationProtocol_Template.docx	Optional but recommended. Documents how to escalate unresolved risks or failed controls.
CBay_StakeholderBriefing_Slides.pptx	Create a 3–5 slide presentation summarizing your risk register, control plan, and high-priority response strategies.

Common Project Tools

You'll likely use the following:

- Excel / Google Sheets – for your risk register, risk matrix, and control matrix
- Word / Google Docs – for the risk narrative, control documentation, and reflection entries
- PowerPoint / Slides – to prepare stakeholder briefings or visual summaries
- Lucidchart / Miro (optional) – to diagram escalation pathways or team workflows

Naming Convention

Use this format for all your files:

CBay__TeamX.extension

Examples:

- CBay_RiskRegister_TeamB.xlsx
- CBay_ControlPlan_TeamA.docx
- CBay_StakeholderSlides_TeamC.pptx

Tips

Your controls are not just checklists—they are your **risk response systems**. Choose and document them like you're preparing the playbook for the team that follows you.

Focus on:

- Clarity
- Ownership
- Monitoring
- Actionability

Good risk management builds trust.

7: CHAPTER 5 - PROJECT EXECUTION

Executing and Monitoring the Project

C-Bay Inc. has officially kicked off development of the **NovaMed Software Platform**, a secure task management system for healthcare environments. To meet aggressive timelines and access specialized engineering capacity, C-Bay has outsourced product development to an external vendor: **WinSoft Systems**, a global software firm with experience in healthcare IT.

You—acting as the C-Bay project team—are now entering the **execution phase**. Your job is to monitor progress, identify warning signs early, and respond professionally to emerging challenges.

NovaMed is a high-stakes initiative. The Steering Committee is watching closely. And development is moving fast.

Objectives

In this milestone, you will:

- Monitor performance using real-time project data (schedule, budget, and earned value)
- Interpret status reports, performance indices (SPI, CPI), and stakeholder feedback
- Receive memos simulating actual project breakdowns from Week 3–6 of development
- Craft structured responses including corrective actions, escalation, and updates
- Reflect on leadership judgment, communication, and decision-making under pressure

Executing and Monitoring the Project

You've scoped the work. You've planned the timeline. You've built the budget. But now the project is live.

In this milestone, you enter the **project execution phase** of C-Bay's NovaMed Software initiative—a high-priority healthcare task management system being developed in partnership with **WinSoft Systems**, an external vendor. You are no longer just building the plan. You are leading it forward.

Execution is where things get real.

What You'll Do

You'll act as the project team at C-Bay responsible for:

- Monitoring progress based on weekly status reports and deliverable tracking
- Evaluating SPI, CPI, and Earned Value performance data
- Responding to simulated execution-phase issues delivered via project memos
- Crafting professional updates for stakeholders, sponsors, and vendor managers
- Implementing adjustments when performance breaks from plan

You will receive a series of **6–8 memos** representing real-world project complications. Your task is to interpret these messages, assess the data, and propose leadership-level responses using tools like:

- Project status reports
- Corrective action plans
- Schedule/budget realignment
- Email briefings and escalation protocols

What's Different About This Phase?

Planning was about precision.
Execution is about **resilience**.

You'll be expected to:

- Lead through uncertainty
- Detect early signs of risk or failure
- Communicate clearly with pressure-tested professionalism
- Track data, timelines, and stakeholder expectations simultaneously

This chapter asks:

Can you deliver while adapting in motion?

7.1: Scenario Brief

7.2: Plan of Attack

7.3: What You Will Submit and Memo Sequence

7.4: Reflection Questions and Lessons Learned

7.5: Submission Checklist and Final Assembly

7.6: Instructor Notes / Evaluation Criteria

7.7: Transition

7.8: Resource Guide for Student Success

OpenAI. (2024). *AI-generated images using ChatGPT with DALL·E* [Digital illustrations]. <https://openai.com>

7.1: Scenario Brief

Scenario Brief

Email

From: Director of Product Delivery, C-Bay Inc.

Subject: Task 5 – Launching Execution and Preparing for Real-Time Challenges

Team,

We are now at **Week 0** of execution for the **NovaMed Software Platform**, and development is officially beginning with our outsourced partner, **WinSoft Systems**. As C-Bay's internal project leadership team, your responsibility is to monitor the day-to-day execution, resolve issues as they arise, and keep the initiative moving forward.

This is where your planning meets reality.

Your Objectives:

You will begin receiving a series of execution-phase documents, emails, and performance reports. Each one will simulate the challenges that arise during live development—including missed deliverables, budget fluctuations, stakeholder escalations, and team confusion.

Your role is to:

- Read each memo and identify the underlying issue
- Analyze available data (status reports, SPI/CPI, cost trends)
- Respond with a clear, professional communication (e.g., action memo, decision update, status summary)
- Recommend adjustments, controls, or escalations as needed
- Communicate proactively to both C-Bay leadership and WinSoft Systems

You'll start with a baseline status at **Week 0**, then receive staged inputs over the coming “weeks” to simulate a fast-paced project environment. Expect 6–8 scenario memos and performance snapshots as the project unfolds.

Your deliverables for each scenario will include:

- Your interpretation of the issue
- A professional response or corrective action plan
- Any forecast, metric, or recommendation that helps C-Bay manage the project successfully

You are not expected to prevent all problems.

You are expected to **respond like a leader when they happen**.

Let's launch execution with focus, urgency, and professionalism.

—

Director of Product Delivery

C-Bay Inc.

7.2: Plan of Attack

Plan of Attack: Leading Execution Through Real-Time Challenges

You're no longer planning the project—you're living it.

In this milestone, your team at **C-Bay Inc.** is responsible for managing the day-to-day execution of the **NovaMed Software Project**, developed by the vendor **WinSoft Systems**. The project has officially launched (Week 0), and your role is to lead through execution by making decisions, tracking progress, responding to issues, and communicating clearly with both internal and external stakeholders.

Task Structure

Each student will receive a series of **project memos** simulating real execution issues. These are based on actual project artifacts and simulate a full lifecycle of execution—from Week 0 kickoff to performance trouble in later weeks.

Each memo requires you to:

1. Diagnose the problem
2. Consult supporting documentation (SOW, HLDD, LLD, Contract, Team Roles, Earned Value data)
3. Write a formal response as a C-Bay project leader
4. Propose clear, accountable next steps

Step 1.1 – How to Respond to Memos (Template - [Word](#)/[PDF](#))

Use This 4-Step Process:

Review the Memo Carefully

- Identify the project phase and week
- Highlight key facts, risks, and red flags
- Reference status reports and project metrics
- Cross-check with project documents: Functional Requirements, HLDD, LLD, SOW, Contract

Write Your Action Plan

In a short paragraph:

- State what the issue is
- Explain its impact (on scope, schedule, cost, quality, team)
- Clarify what your team will do next
- Identify any assumptions or limitations

Tip: Treat this like a log entry for a real project dashboard.

Write a Professional Communication

Use this format to structure your message:

Format for Writing Memos

Field	Example / Instruction
To:	WinSoft PM, Director, or internal C-Bay lead
Cc:	QA Lead, Sponsor, or relevant teams
Subject:	Action Required: NovaMed [Issue Type] – [Short Context]
Week & Day:	Indicate the project timeline (e.g., Week 1, Day 3)
Attachment:	Link or file reference (status report, diagram, etc.)

Structure your message like this:

- Brief summary of the issue
- A direct, professional tone
- What action or decision is required
- Timeline or deadline
- Optional next steps or escalation route

Upload to Your Team Folder

Submit your completed task using this format:

CBay_ExecutionTask__YourName.docx

Also maintain a personal submission tracker to document:

- Memo title
- Issue type
- Date submitted
- Response type
- Any open follow-up items

Common Pitfalls to Avoid

- Writing an emotional or vague response
- Failing to mention action deadlines or owners
- Ignoring metrics or contract references
- Responding to the wrong audience (e.g., internal instead of vendor-facing)
- Skipping documentation of assumptions or constraints

Sample Mini-Response (Preview)

Subject: Action Required – HLDD Delay and Mitigation

Hello Ravi,

Based on your update, the HLDD has not been submitted as scheduled. This delays downstream development by 3 days and may impact Milestone 2 completion.

Please submit a revised plan by Friday with adjusted delivery dates and risk mitigation for overlapping tasks.

Thank you,
— C-Bay PM Team

Step 1.2 – Understand the Execution Environment (Before Responding to Memos)

Project Summary

NovaMed is a secure, modular task management solution being developed for healthcare networks by C-Bay Inc. Development has been outsourced to WinSoft Systems, under a fixed-fee contract governed by the Statement of Work (SOW) and associated deliverables.

The execution phase has now begun. WinSoft is expected to deliver development in three construction iterations (RC1, RC2, RC3) with defined milestone checkpoints. This first memo sets the stage and provides background to help students understand how to respond to future issues.

Key Artifacts (Available for Reference)

- **Statement of Work:** Defines milestones, payment triggers, and timelines for release candidates
- **Contract:** Specifies scope, roles, change management terms, and review expectations
- **Software Requirements Specification:** Details required features for Release Candidate 1
- **High Level Design Document:** System-level and component-level design documentation
- **WinSoft Team Overview:** Includes Project Manager (Ravi Singh), Lead Architect, QA Lead, and three developers
- **Status Reports:** Weekly Excel-based status summaries, submitted every Friday by 5 PM PST
- **Reporting Guidelines:** EVM calculations required weekly; deviation thresholds >10% must trigger notification

What You Need to Know to Respond

When responding to future memos:

- Always check the SOW milestone timeline to determine if deliverables are on track
- Reference the contract scope and change policy if there are deviations or feature creep
- Validate whether WinSoft's staffing and roles match the expected structure
- Use the SRS, HLDD, or LLD to cross-check whether delays are architectural, functional, or resource-related
- Compare any reported delays with the Earned Value Data: SPI, CPI, and EV metrics
- Watch for communication issues or reporting noncompliance based on WinSoft's obligations

Before responding to ANY execution memo, students must understand the full execution environment defined by the uploaded artifacts. This step ensures that every response is grounded in contractual expectations, reporting rules, technical documents, and team roles.

Students must review the following knowledge set before Week 1:

Know What WinSoft Must Deliver (Use SOW for Reference)

Use the NovaMed SOW (**Statement of Work**) to understand:

- Release 1–4 deliverables
- Milestone deadlines
- Acceptance criteria
- Documentation required
- Integration & acceptance testing responsibilities
- What IV&V C-Bay can audit at any time

This helps students detect:

- Missed deliverables
- Schedule slippage
- Documentation failures
- Testing shortcuts

Know the Contractual Rules (Use Contract for Enforcement)

The NovaMed Contract ([Contract](#)) determines what students can require of WinSoft.

Critical clauses:

- Weekly Status Reports are mandatory for payments
- Missing/incomplete reporting may trigger withholding
- Key personnel cannot be replaced without 5-day approval
- C-Bay owns all IP
- Termination terms (30-day turnover window)
- Confidentiality and NDA requirements

Students MUST cite contract clauses when responding to:

- Late status reports
- Missing Bulls-Eye charts
- Staff turnover at WinSoft
- Requests for unpaid re-work
- Incomplete milestone submissions

Know the Team You Are Communicating With (Use WinSoft Resource List)

The WinSoft Team Overview ([WinSoft Team Overview](#)) identifies:

- Who to escalate to
- Who has the skill to resolve issues
- What each team member specializes in
- Seniority (Entry, Mid, Lead levels)

Examples:

- Architectural issues → Arnold (Architect)
- Schedule or resource problems → Julie (Project Manager)
- Testing issues → Catherine (QA Manager)
- Requirements confusion → James (BA)
- UI issues → Tom (Tech Lead)

Students MUST route emails to the right person in every memo.

Know the Reporting Expectations (Use Reporting Guidelines & Weekly Template)

From Reporting Guidelines ([Reporting Guidelines](#)) and Weekly Status Template ([Status Reports](#)):

WinSoft MUST include in every weekly report:

- PV, EV, AC
- SPI, CPI, SV, CV
- Bulls-Eye chart
- Work package breakdown
- Issues, risks, CRs
- Weekly cost reporting (\$1/hr normalization)

- Variance explanations $\geq 20\%$

Students must detect:

- Missing metrics
- SPI < 1.0 or CPI < 1.0
- Patterns of deterioration across weeks
- Broken reporting discipline
- Vendor masking schedule slips

Know the System Being Built (Use SRS + HLDD)

From SRS ([Software Requirements Specification](#)) and HLDD ([High Level Design Document](#)):

- Modules in NovaMed: Tasks, Users, Teams, Roles, Permissions, Projects, Reporting
- Login → Operations → Logout lifecycle
- UI → Controller → Business Logic → DB layers
- Data synchronization rules for offline mode
- RBAC structure
- Critical functional requirements

Students must use this technical knowledge when:

- Determining cause of a defect
- Assessing impact of a design delay
- Understanding how one component relies on another
- Deciding whether a defect is severe or minor

Step 1.3 – How to Analyze the Memo

Students must follow a rigorous diagnostic workflow before writing a response.

Extract the Core Issue

Identify whether it is:

- A schedule delay
- A cost overrun
- A defect or rework problem
- A missing deliverable
- A staffing issue
- A contract violation
- A risk that has materialized
- A communication/reporting failure

Every memo will contain *surface text* and *root causes*.
Students must detect both.

Identify Which Control Pillar(s) Are Impacted

From Chapter 4:

- Scope
- Schedule
- Budget
- Quality
- Team

Students must tick all that apply.

Determine Severity Using:

- SPI (Schedule)
- CPI (Cost)
- SOW deadlines
- Contract clauses
- Technical dependencies (from HLDD/SRS)
- Reporting compliance

Consult All Relevant Documents

Students must reference:

- SOW milestones
- Contract obligations
- Reporting expectations
- Latest status report
- Resource list
- Technical requirements
- HLDD dependencies

This is where they justify their professional decision.

Step 1.4 – How to Write the Response

Using the **Individual Action Plan & Communication Template** (), students will now craft a structured response.

Internal Action Plan (Not Sent to WinSoft)

Students must write:

Core Issue

Short and accurate diagnosis.

Impact Areas

Check all affected pillars.

Referenced Documents

Explicitly cite:

- “Per SOW Milestone 2...”
- “Per Contract Section 7.2...”
- “Per Reporting Guidelines p.2...”
- “Per HLDD Component Diagram...”

Next Action

Clear next steps, e.g.:

- Request revised schedule
- Reject incomplete deliverable

- Trigger risk escalation
- Request design clarification
- Schedule a technical review

Constraints

Examples:

- Upcoming release deadlines
- Staffing limits at WinSoft
- Contract prohibits scope changes

Professional Email / Memo (Sent to WinSoft or C-Bay Leadership)

Structure:

- To: Correct WinSoft recipient
- CC: C-Bay PMO, QA, Systems Engineering
- Subject: "Action Required – NovaMed [Issue] – Week X"
- **Body Includes:**
 - Issue summary
 - Expected deliverable and reference
 - What is missing or incorrect
 - Required action
 - Deadline
 - Offer of support
 - Reminder of contractual expectations if necessary

Example (Mini):

Subject: Action Required – Missing Bulls-Eye Chart – Week 3 Status

Hello Julie,

In reviewing the Week 3 Status Report, the Bulls-Eye chart for Release 1 is missing. Per Reporting Guidelines (p. 2) and Contract Section 7.1, this is required for progress payment authorization.

Please provide the missing chart by 12:00 PM tomorrow so we can proceed with milestone tracking.

Thank you,
C-Bay PM Team

7.3: What You Will Submit and Memo Sequence

What Students Will Submit (Chapter 5 – Execution Phase)

For Chapter 5, you will simulate the role of the C-Bay Project Management Team during the execution of the NovaMed Software Project. Your job is to monitor vendor performance, analyze issues, and communicate professionally with WinSoft Systems.

You will submit the following items for assessment:

Eight Completed Action Plan Worksheets (One for Each Memo)

You will complete one **Individual Action Plan & Communication Worksheet** for each memo (Memos #1–#8).

Each worksheet includes two parts:

PART A – Internal Action Plan (Not Sent to WinSoft)

You will analyze the memo and document:

- The core issue
- Impacted project domains (schedule, cost, scope, quality, team, vendor compliance, reporting)
- References to the SOW, Contract, Reporting Guidelines, SRS, HLDD, or Weekly Status Report
- Your recommended next action
- Assumptions, risks, or constraints

PART B – Professional Communication (Sent to WinSoft or C-Bay Leadership)

You will write a formal email or memo that:

- Addresses the correct WinSoft team member(s)
- Uses a professional tone and structure
- Summarizes the issue
- Requests corrective action and sets deadlines
- References contractual or reporting obligations where appropriate

A Consolidated Progress Log (Optional but Encouraged)

A single-page document summarizing:

- Issue type encountered in each memo
- Your response focus
- Lessons learned week by week
- Patterns in vendor performance

This demonstrates growth and reflection across the execution timeline.

Suggested file name:

CBay_ExecutionPhase_ProgressLog_YourName.docx

The Final Execution Reflection (Required)

At the end of the chapter, you will submit a short written reflection (½–1 page) analyzing:

- What you learned about project execution
- How you used artifacts (SOW, Contract, SRS, HLDD, Reporting Guidelines) to make decisions
- How Earned Value metrics influenced your actions
- What you would do differently as a project leader in a real-world environment

File name:

CBay_ExecutionReflection_YourName.docx

Final Submission Package

At the end of Chapter 5, you will upload a single folder containing:

8 Memo Worksheets

Final Reflection

Optional Progress Log

Folder naming convention:

CBay_ExecutionPhase_YourName/

Chapter 5 – Memo Sequence Overview (Weeks 1–6)

In this chapter, you will operate as the **C-Bay Inc. internal project leadership team** overseeing WinSoft Systems during the execution of the NovaMed Software development.

You will receive a sequence of **eight memos**, each simulating a real-world execution problem such as:

- Reporting failures
- Missed design milestones
- Earned Value performance drops
- Quality issues and defect spikes
- Unauthorized scope changes
- Staffing challenges
- Integration failures
- Multi-front cost/schedule crises

Each memo contains:

- A realistic email from a WinSoft team member
- Embedded issues or mistakes
- Missing or incorrect data
- Risks that must be identified
- References to SOW, Contract, SRS, HLDD, and Reporting Guidelines

Your job is to:

Read the memo carefully

Extract what the *actual* problem is (not just what is said).

Use the Action Plan Template

Fill out Part A (internal) + Part B (email/memo response).

Cite the correct documents

Contract clauses, SOW deadlines, reporting requirements, design dependencies, etc.

Recommend actions as a real PM

Your responses should sound like professional PMO correspondence.

The Memo Sequence Below are the **eight execution memos**, each introduced with context and followed by the exact email content students will receive.

These memos appear in order throughout the milestone simulation.

Full simulation of execution-phase problems

This sequence is specifically crafted to:

- Touch ALL five control pillars (scope, schedule, cost, quality, team)
- Use all uploaded artifacts (SOW, Contract, SRS, HLDD, Reporting Guidelines, Status Templates, Resource List)
- Use Earned Value and Bulls-Eye data
- Build from simple → complex → multi-problem scenarios

You can respond to the memo in the [following](#) worksheet.

MEMO #1 — Week 1, Day 2

Missing Status Report Deliverables (Early Red Flags)

From: Julie (WinSoft Project Manager)

To: C-Bay PM Team

Subject: Week 1 Status Report Submission

Hello Team,

Attached is our **Week 1 Status Report**. We have made initial progress on the NovaMed GUI components and have begun reviewing the SRS with our developers.

Please note that the **Bulls-Eye chart is not included** this week as we are still configuring our reporting environment. Also, Earned Value values (PV/EV/AC) will be populated starting next week when more work hours have been logged. We expect all reporting elements to be in place by Week 2.

Let me know if you have any questions.

Thanks,

Julie

WinSoft Project Manager

Problems embedded for students:

- Missing mandatory Bulls-Eye (Contract + Reporting Guidelines)
- Missing EVM metrics (required starting Week 1)
- Status report late/partial

- No milestone alignment mentioned
- “Expect next week” violates SOW deadlines

MEMO #2 — Week 2, Day 3

HLDD Delay (Architect Bottleneck)

From: Arnold (Software Architect)
To: C-Bay Systems Engineering
Cc: Julie, Tom
Subject: HLDD Status – Minor Delay

Hi Team,

I wanted to inform you that the **High-Level Design Document (HLDD)** will need an additional **3–4 days**. We discovered a few inconsistencies in the database relationship diagrams and need to adjust our API routing logic to align with the backend authentication approach.

This should not significantly affect the broader schedule because development can begin in parallel.

I will send the updated HLDD by **end of Week 2**.

Regards,
Arnold
Software Architect, WinSoft

Problems embedded for students:

- HLDD delay directly impacts development start (false claim “development can begin in parallel”)
- SOW requires design completion before coding
- No risk analysis or revised plan provided
- Should have been escalated to PM (not directly to systems engineering)

MEMO #3 — Week 3, Day 5

Cost Overrun Emerging (CPI Drop)

From: Julie (WinSoft PM)
To: C-Bay PM Team
Subject: Week 3 Status Report – Cost Update

Team,

Please find the **Week 3 Status Report** attached.

We logged more hours than expected this week due to onboarding a few new developers and resolving unexpected UI framework compatibility issues. Our **Actual Cost (AC)** is higher than planned, but we believe this will normalize next week once the new team members get ramped up.

We do not anticipate any milestone impact at this time.

Thanks,
Julie

Problems embedded for students:

- Early CPI drop (from EV < AC) with vague explanation
- AC higher but no clear cause analysis
- Onboarding hours should be planned, not “unexpected”
- Single-sentence dismissal of risks
- SOW requires deviation >20% to be explained
- PM denies milestone impact without evidence

MEMO #4 — Week 4, Day 2

Quality Issues & Rising Defects

From: Catherine (QA Manager)

To: Julie, C-Bay QA

Subject: Defect Findings – Online Modules

Hi Everyone,

During our initial integration testing for the Online Product modules, we identified **27 defects**, including:

- 6 critical issues related to Role Management
- 3 authentication failures
- 9 UI inconsistencies
- 5 missing validations
- 4 backend sync mismatches

We are working with the dev team to triage and fix these as quickly as possible. Given the volume, we may delay integration testing for a few days.

Regards,
Catherine

Problems embedded for students:

- High-severity issues affecting SRS compliance
- Delay required but not escalated
- No regression testing plan
- Cross-team coordination missing (no dev lead copied)

MEMO #5 — Week 5, Day 1

Unauthorized Scope Change Request

From: James (Business Analyst)

To: C-Bay PM Team

Subject: Feature Suggestion – Task Templates

Hello,

During our requirements review, it occurred to us that adding a **Task Template Feature** would enhance NovaMed’s usability. Several healthcare clients we’ve worked with in the past have requested the ability to save and reuse standardized task templates.

We believe adding this functionality now would greatly benefit the product before Release 2.

Let me know your thoughts.

James

WinSoft BA

Problems embedded for students:

- Suggesting new feature mid-sprint
- Not in SOW or SRS
- Violates Contract: requires Change Request
- No impact assessment
- Trying to alter scope during critical window

MEMO #6 — Week 5, Day 4

Staffing Issue – Key Developer Resigned

From: Julie

To: C-Bay PM Team

Subject: Developer Availability Update

Team,

Unfortunately, one of our mid-level developers, Bharathi, resigned unexpectedly and is no longer available effective immediately. We're reallocating some work internally and hope this won't affect the Release 2 timeline.

We will keep you posted.

Julie

Project Manager, WinSoft

Problems embedded for students:

- Violates Contract: must notify C-Bay within 5 days + provide replacement resume
- Immediate departure without transition plan
- Staffing risk not evaluated
- SOW deliverables at risk
- No mitigation strategy

MEMO #7 — Week 6, Day 3

Integration Failure – Technical Breakdown

From: Tom (Technical Lead)

To: C-Bay Technical Lead

Cc: Arnold, QA, Julie

Subject: Integration Issues – Online Modules

Hi Team,

We attempted to integrate the Online Product modules today, but we are seeing:

- API routing mismatches
- Authentication errors across multiple endpoints
- Database schema inconsistencies with HLDD
- Controller methods missing required parameters

- Several broken event listeners

We are still assessing impact and will send a follow-up after the dev team meets.

Regards,
Tom
WinSoft Technical Lead

Problems embedded for students:

- Major integration failure (root cause: HLDD delay)
- Missing version alignment
- Broken CI processes
- No immediate remediation plan
- SOW Milestone 2 jeopardized

MEMO #8 — Week 6, Day 5

Multi-Front Crisis – Cost + Schedule + Quality Failure

From: Julie
To: C-Bay PM Team, Director of Delivery
Subject: Week 6 Status Report – Summary

Team,

Attached is the Week 6 Status Report.

Key highlights:

- SPI = 0.68
- CPI = 0.71
- 45 open defects
- Integration testing halted
- Several modules behind schedule
- AC continues to rise due to additional testing hours
- Bulls-Eye Chart will be provided next week as we are consolidating data

We are doing our best to stabilize the build.

Julie

Problems embedded for students:

- Red SPI + CPI with no corrective action plan
- SPI < 0.7 indicates severe schedule slippage
- CPI < 0.75 indicates severe cost overrun
- Missing Bulls-Eye again (non-compliance)
- Defect backlog severe
- Testing halted = critical escalation
- No structured recovery plan

This page titled [7.3: What You Will Submit and Memo Sequence](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

7.4: Reflection Questions and Lessons Learned

Chapter 5 – Reflection Questions & Lessons Learned

Execution Under Pressure: What Did You Learn?

By completing the NovaMed Execution Simulation, you experienced what real project managers face daily: incomplete information, unexpected problems, ambiguous signals, constrained timelines, and stakeholder expectations that do not stop just because the vendor slipped.

Execution forces you to lead in motion.

Reflection forces you to learn from that motion.

Use the prompts below to reflect deeply on your performance, your decisions, and your growth during this chapter.

Individual Reflection Questions

- 1. What patterns did you notice across the eight memos?**
 1. Were issues escalating, recurring, or compounding?
 2. Did you anticipate any of them before they appeared?
- 2. Which memo was the most challenging for you — and why?**
 1. Did the difficulty come from technical ambiguity, Earned Value analysis, communication pressure, vendor behavior, or conflicting priorities?
- 3. How did your understanding of project execution change during this chapter?**
 1. What surprised you about the difference between *planning* and *execution*?
- 4. Where did you hesitate — and what caused that hesitation?**
 1. Was it lack of information? Fear of saying the wrong thing? Uncertainty about referencing the SOW, Contract, or EVM data?
- 5. What did you learn about communicating under pressure?**
 1. Consider tone, clarity, escalation timing, and professionalism.
- 6. Which Project Control Pillar (scope, schedule, cost, quality, team) was hardest to manage?**
 1. Why was this pillar more complex than the others?
- 7. Which document (SOW, Contract, Reporting Guidelines, SRS, HLDD) did you rely on most — and why?**
 1. What did that tell you about your decision-making process?
- 8. If you could redo one memo response, which one would it be and how would you respond differently?**
 1. What do you know now that you didn't know then?

Team Debrief Questions

Schedule 20–30 minutes with your team to discuss these prompts.

Record your discoveries — they will help you grow as collaborators.

- 1. How aligned were your interpretations of the memos?**
 1. Did different teammates see different issues or risks?
- 2. How did your team handle situations where there was no obvious “right” answer?**
 1. Think about Memo 3 (cost overrun) or Memo 8 (multi-front crisis).
- 3. How did Earned Value data influence your decisions?**
 1. Where did metrics help? Where did they confuse or mislead your team?
- 4. Which control strategies worked best for your team — and which did not?**
 1. Did you find yourselves leaning too heavily on one pillar (like schedule) while neglecting others?
- 5. Did your communication strategies improve over the course of the memos?**
 1. Identify one communication habit your team developed that strengthened your responses.
- 6. What did you learn about working with an outsourced vendor?**

1. Consider expectations, dependencies, accountability, and escalation.

Patterns to Watch (Execution Phase)

Patterns to Watch

Pattern	Signal	What to Do
"We're just reacting."	Always behind issues	Move to proactive monitoring using EVM + controls
"Let's wait and see."	Delayed decisions → bigger problems	Create a fast escalation rule
"We don't have enough info."	Vendor withholding info	Cite contract + request mandatory details
"Maybe this will resolve itself."	Avoidance of conflict	Communicate immediately, professionally
"This seems small."	Underestimating defects or delays	Assess downstream dependencies

Optional Reflection Essay Prompt

"Leading this execution phase taught me that project control is not about preventing surprises — it's about responding to them with clarity and authority. The moment that challenged me most was _____. I handled it by _____. Next time, I will focus on improving _____ as a project leader."

Purpose of Reflection

This chapter was intentionally stressful.

It replicated the real-world reality that execution rarely goes as planned.

Reflection ensures that:

- Your learning becomes portable
- Your decision-making becomes repeatable
- Your leadership becomes intentional

Would you like this converted into a **Word document**, **PDF**, or **added directly into Chapter 5 master doc**?

This page titled [7.4: Reflection Questions and Lessons Learned](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

7.5: Submission Checklist and Final Assembly

7.5 Submission Checklist and Final Assembly

Ensuring Your Execution Deliverables Are Complete, Coherent, and Professional

By the end of this chapter, you will assemble a complete execution-phase deliverable package that demonstrates your ability to:

- Diagnose real project execution problems
- Apply SOW, Contract, SRS, and HLDD expectations
- Use performance metrics (SPI, CPI, SV, CV, EAC)
- Write professional PMO-quality communications
- Monitor vendor performance under pressure
- Recommend corrective actions with clarity and authority

Use this checklist to make sure your deliverables are complete and in their final polished state before submission.

Required Deliverables

Each student must submit **all items** below.

Eight Completed Memo Worksheets

One worksheet per memo (Memo #1 through Memo #8), each including:

- Part A – Internal Action Plan
 - Core issue
 - Impact areas (scope/schedule/cost/quality/team/vendor/reporting)
 - Document references (SOW/Contract/SRS/HLDD/Reporting Guidelines)
 - Recommended next action
 - Assumptions or constraint
- Part B – Professional Communication
 - Email or memo formatted professionally
 - Correct recipient(s) based on WinSoft Resource List
 - Clear actionable requests
 - Contractual or SOW-specific citations where needed
 - Deadline or follow-up expectations

File naming format:

CBay_MemoX_Worksheet_YourName.docx

Final Execution Reflection (Required)

A ½–1 page reflection addressing:

- What you learned about project execution
- How Earned Value influenced your decisions
- Which memo challenged you most
- Where you hesitated and why
- How your leadership judgment evolved
- What you would do differently in a real project

File name:

CBay_ExecutionReflection_YourName.docx

Progress Log (Recommended)

A simple table or summary tracking:

- Week
- Memo topic
- Issue category
- Your response theme
- Lessons learned

This helps demonstrate iterative learning. File name:

CBay_Execution_ProgressLog_YourName.docx

Optional Deliverables (Extra Credit)

Earned Value Workbook (Optional but Strongly Encouraged)

Using the provided spreadsheet template:

- Fill in PV, EV, and AC
- Review auto-calculated SV, CV, SPI, CPI
- Include your own commentary on performance trends

File name:

CBay_EVM_YourName.xlsx

Updated Bulls-Eye Chart (Optional)

Chart using SPI (x-axis) and CPI (y-axis) for any memo or combined performance.

File name:

CBay_BullsEye_YourName.xlsx

Folder Structure for Final Submission

Submit your complete package as a **single folder** named:

CBay_ExecutionPhase_YourName

Your folder should include:

```
CBay_ExecutionPhase_YourName/  
├── Worksheets/  
│   └── CBay_Memo1-8_Worksheet_YourName.docx  
├── Reflection/  
│   └── CBay_ExecutionReflection_YourName.docx  
└── Optional/
```

```
├── CBay_EVM_YourName.xlsx          (optional)
├── CBay_BullsEye_YourName.xlsx     (optional)
├── CBay_Execution_ProgressLog_YourName.docx (optional)
└── README.txt                     (optional summary of your submission contents)
```

Quality Assurance Checklist (Final Review Before Submission)

Use this checklist to confirm your package is complete:

Worksheets

- Folder Structure for Final Submission
- All 8 worksheets included
- Each worksheet has both **Part A** and **Part B** completed

All emails/memos have correct recipients

You cited SOW/Contract/Reporting Guidelines when appropriate

Actions requested are specific, reasonable, and time-bound

Professional Tone

- Messages are respectful, direct, and structured
- No emotional or informal language
- You wrote like a PM communicating with a vendor

Alignment with Documents

- All recommendations align with SOW milestones
- Contract rules followed (e.g., staffing replacement window, reporting requirements)
- Reporting guidelines applied correctly
- Technical issues align with SRS/HLDD

Reflection

- Final reflection is thoughtful and specific
- Lessons learned relate to execution, not planning only

Files

- Everything named correctly
- Files open successfully
- Folder packaged cleanly

Final Assembly Submission Guidance

Your final assembly should reflect:

- Professionalism
- Mastery of project execution
- Understanding of vendor management
- Ability to diagnose issues
- Clear communication under pressure

- Use of project controls and metrics

Submit your work in the format required by your instructor (Canvas upload, shared drive, etc.).

This page titled [7.5: Submission Checklist and Final Assembly](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

7.6: Instructor Notes / Evaluation Criteria

Instructor Notes / Evaluation Criteria

How to Evaluate Student Responses in the Execution Phase

The NovaMed execution simulation is intentionally complex. Students are expected to interpret incomplete information, reference multiple documents, apply project controls, and demonstrate professional-level communication.

This assessment measures not just knowledge, but **judgment, clarity, and leadership behavior** under pressure.

Overview for Instructors

Students receive **eight execution memos**, each containing:

- A real-world project issue
- A disguised or incomplete problem
- Risks that must be inferred
- Conflicts between SOW/Contract/Reporting Guidelines
- Missing or inconsistent reporting data
- Technical clues tied to SRS/HLDD

Students must produce:

1. Eight Worksheet Responses
 1. Part A: Internal Action Plan
 2. Part B: Professional Communication
2. Final Execution Reflection
3. (Optional) EVM Sheet or Progress Log

You will evaluate both the **accuracy** of their analysis and the **professionalism** of their communication.

Core Evaluation Criteria (Suggested-Weighted Rubric)

Use this rubric for each memo worksheet:

Issue Identification & Analysis (25%)

Did the student:

- Correctly identify the core issue(s)?
- Distinguish between symptoms and root causes?
- Recognize which control pillars were affected?
 - Schedule
 - Budget
 - Scope
 - Quality
 - Team
 - Vendor compliance
 - Reporting
- Interpret Earned Value metrics accurately when relevant (SPI, CPI, SV, CV)?

High Score Characteristics:

- Student catches subtle inconsistencies or hidden risks
- Student references SOW/Contract timelines
- Student mentions downstream impact on milestones

Use of Project Artifacts (25%)

Evaluate whether the student properly cited and used:

- **SOW for milestone deadlines and acceptance criteria**
- **Contract for reporting obligations, scope control, and staffing rules**
- **Reporting Guidelines for weekly expectations**
- **SRS/HLDD to identify technical or architectural impacts**
- **Weekly Status Template to contextualize missing data**

High Score Characteristics:

- Student makes explicit, correct references (“Per Contract §7.1...”)
- Student applies PM controls tied to each document
- Student uses artifacts to justify their decisions

Recommended Next Actions (20%)

Does the student recommend **appropriate, actionable** steps such as:

- Requesting corrected reports
- Setting deadlines
- Scheduling escalation or technical review
- Requesting mitigation or replacement resources
- Blocking downstream testing if required
- Triggering Contract / SOW / CR processes
- Requesting revised timeline or root cause analysis

High Score Characteristics:

- Recommendations are realistic
- Actions align with professional PMO behavior
- Deadlines are clear, reasonable, and time-bound

Professional Communication Quality (20%)

Evaluate the student’s emailed/memo response:

- Tone is professional, concise, and firm
- Message is clear and structured
- Correct recipient(s) based on WinSoft Team List
- Subject line is action-oriented
- References data instead of emotion
- Communicates expectations, deadlines, and consequences

High Score Characteristics:

- Communication is polished and stakeholder-ready

- Uses structured PMO style:
 - context → issue → action → deadline → follow-up
- No informal language

Completeness & Presentation (10%)

- Worksheet fully filled out
- Submitted in required naming format
- No missing fields
- Formatting is clean and readable

Detailed Instructor Guidance Per Memo

Below is a summary of what *should* be detected in each memo.

Memo #1 – Reporting Failure

Look for:

- Missing Bulls-Eye chart flagged
- Missing EV values flagged
- Contract reporting clause referenced
- Request for corrected report within 24 hours

Memo #2 – HLDD Delay

Look for:

- Design delay flagged as schedule-impacting
- Student identifies dependency: dev cannot begin without HLDD
- Requests revised timeline + impact analysis

Memo #3 – CPI Drop

Look for:

- Student uses EV_Data (AC > EV)
- CPI < 1.0 correctly interpreted
- Student requests root cause + corrective plan

Memo #4 – 27 Defects

Look for:

- Quality risk identified
- SRS sections referenced
- Request for triage, impact assessment, stabilization sprint

Memo #5 – Unauthorized Scope Change

Look for:

- Recognition of scope creep
- Contract's Change Request clause cited

- Student denies change politely

Memo #6 – Developer Resignation

Look for:

- Identification of Contract violation (5-day replacement rule)
- Request for resume and transition plan

Memo #7 – Integration Failures

Look for:

- Students reference HLDD (API designs, DB design)
- Request for emergency technical review
- Identification of cascading risks

Memo #8 – Multi-Front Crisis

Look for:

- Full Earned Value interpretation (SPI & CPI < 0.70)
- A structured 4–5 step stabilization plan
- Possible escalation to Steering Committee

Evaluating the Final Reflection

The final reflection should demonstrate:

- Growth: “What changed in your understanding of execution?”
- Awareness of ambiguity and incomplete information
- Analytical thinking under pressure
- Recognition of communication habits
- Identification of patterns across memos
- Mature understanding of vendor management

Strong reflections include:

- Specific details from memos
- Discussion of mistakes corrected
- Insights about EVM and controls
- Honest assessment of decisions

Instructor Red Flags (Common Student Errors)

- ✓ Emotional tone (“You guys messed this up.”)
- ✓ Vague actions (“You need to fix this.”)
- ✓ Not referencing SOW/Contract
- ✓ Not detecting hidden issues
- ✓ Over-relying on one control pillar
- ✓ Responding to the wrong WinSoft team member
- ✓ Misinterpreting SPI/CPI

Use this to coach students early or provide corrective feedback.

Recommended Grading Scale

Grading Scale

Component	Weight
Issue Identification & Analysis	25%
Use of Project Artifacts	25%
Recommended Actions	20%
Professional Communication	20%
Completeness/Presentation	10%

Instructor Notes (Pedagogical)

- Students typically struggle most with Memo #3 (CPI Drop) and Memo #8 (Multi-Crisis).
- Encourage students to read slowly and not assume the email is telling the whole truth.
- Prompt them to “treat memos like forensic documents.”
- The goal is not to “catch WinSoft,” but to lead with structure and clarity.
- Reinforce that project execution is (and always will be) messy — the point is to manage the mess well.

7.7: Transition

Transition to Project Closing

From Execution to Completion: Preparing for the Final Phase

You have now completed the most demanding part of the NovaMed simulation: **executing and monitoring the work while it is in progress**. You have responded to real-time issues, analyzed Earned Value performance, enforced the SOW and Contract, escalated critical risks, interpreted design and requirement misalignments, and made decisions under uncertainty.

This is what real project execution feels like.
But execution is not the end of the story.

Now you must transition from **leading the work** to **capturing what the work produced**—and ensuring the project is ready for final delivery, evaluation, and closure.

Project closing is more than simply “stopping work.”
It includes:

- Verifying that all contracted deliverables are complete
- Ensuring acceptance criteria have been met
- Closing out documentation, test results, and user materials
- Confirming that defects have been resolved or formally deferred
- Conducting final evaluations (technical, financial, contractual)
- Performing handover to operations or client teams
- Releasing resources and finalizing vendor obligations
- Collecting lessons learned and archival materials
- Closing the contract formally and professionally

Where execution is about **momentum**,
closing is about **precision and completeness**.

In the next chapter, you will:

- Conduct a structured final review of NovaMed
- Validate work against the SOW, Contract, SRS, and HLDD
- Prepare a Final Acceptance Summary
- Build a Closeout Package
- Complete a vendor performance evaluation
- Document lessons learned from the entire experience
- Reflect on how well the team managed quality, communication, schedule, cost, and collaboration
- Learn how successful organizations “finish well”

Project closing is the capstone of project management.
It is where leadership, documentation discipline, and customer confidence come together.

You've navigated the complexity of execution.
Now it's time to learn how to **close a project with clarity, professionalism, and confidence**.

Welcome to **Chapter 6: Closing the Project and Capturing Lessons Learned**.

7.8: Resource Guide for Student Success

Tools, Templates, and Supports for Executing & Monitoring the NovaMed Project

Chapter 5 places you in the role of a project leader managing the day-to-day execution of the NovaMed Software development effort with WinSoft Systems. You will interpret real-time issues, analyze Earned Value data, enforce contractual obligations, and communicate with clarity and authority. The tools below are designed to help you navigate each memo scenario and produce professional, defensible responses.

Core Execution Tools

These tools replicate what real PMO teams use when overseeing outsourced development partners.

Weekly Status Report Template (WinSoft Standard)

File: [Weekly Status Report Template.pdf](#)

Use this format to understand what should be included in a complete Weekly Status Report.

You will compare WinSoft's submitted reports (in simulation memos) against this template to identify:

- Missing EVM metrics
- Missing Bulls-Eye charts
- Incomplete milestone tracking
- Poorly communicated risks or issues
- Deviations from required reporting quality

Earned Value & Bulls-Eye Excel Template

File: [WinSoft_EarnedValue_BullsEye_Template.xlsx](#)

This spreadsheet auto-calculates:

- PV, EV, AC
- SV, CV
- SPI, CPI
- EAC, VAC

Use it to:

- Confirm whether WinSoft's numbers appear reasonable
- Diagnose performance (weeks where SPI or CPI drop)
- Forecast cost and schedule outcomes
- Support your memo responses with quantitative evidence

Individual Action Plan & Communication Template

File: [Individual Action Plan & Communication Template.pdf](#)

Use this for each memo:

- PART A: Internal analysis of the issue, document references, next actions
- PART B: Professional email or memo response
- Mirrors internal PMO documentation used by real organizations

Project Artifacts You Will Reference

Execution relies heavily on understanding project baselines. Use these documents to ground your decisions.

NovaMed Statement of Work (SOW)

File: [NovaMed_SOW.pdf](#)

Key items you'll use:

- Milestone deadlines
- Acceptance criteria
- Documentation requirements
- Integration testing responsibilities
- IV&V authority
- Vendor obligations

Required for memos involving:

- delays
- incomplete deliverables
- testing failures
- acceptance or rejection of work

NovaMed Contract

File: [NovaMed_Contract.pdf](#)

Critical for:

- Reporting obligations
- Progress payment conditions
- Key personnel replacement rules
- Change request enforcement
- Termination clauses

This is especially important in memos involving:

- missing reports
- unauthorized scope changes
- staffing issues

Reporting Guidelines

File: [Reporting Guidelines.pdf](#)

Use to validate whether WinSoft's weekly submissions comply with:

- Mandatory content
- Required delivery timeline (Friday 5 PM)
- Deviation thresholds (>20%)
- Bulls-Eye + EV reporting
- Presentation expectations

WinSoft Systems Resource List

File: [WinSoft Systems Resource List.pdf](#)

Use this list to:

- Direct your emails to the correct WinSoft role
- Identify skill gaps causing delays
- Recommend specific individuals for technical follow-ups
- Escalate issues to appropriate personnel

Software Requirements Specification (SRS)

File: [Software Requirements Specification.pdf](#)

Critical for:

- Understanding required functionality
- Determining severity of defects
- Identifying missing or misaligned features
- Verifying compliance with functional specifications

Used heavily in memos involving:

- Role Management defects
- Authentication issues
- Permissions and reporting failures

High-Level Design Document (HLDD)

File: [High Level Design Document.pdf](#)

Essential for memos involving:

- Integration breakdowns
- Missing APIs
- Mismatched database schema
- Misaligned component interfaces
- Architectural inconsistencies

Communication Support Tools

Professional Email Writing Guide (Integrated in Action Plan Template)

Use the templates to:

- Write structured PMO communications
- Maintain a calm, authoritative tone
- Provide clear requests, deadlines, expectations
- Escalate issues professionally

Sample Phrases for Vendor Communication

Use phrases like:

- “Per Section __ of the Contract...”
- “To maintain alignment with the SOW milestone schedule...”
- “In order to proceed with acceptance testing...”
- “Please provide a revised plan by...”
- “This deviation requires immediate corrective action because...”

These reinforce your authority and clarity.

Decision-Making Tools

Control Pillar Reference

Use Chapter 4's five control pillars to categorize issues:

- Scope
- Schedule
- Budget/Cost
- Quality
- Team

Each memo impacts at least one of these pillars.

High-performing submissions identify *multiple interacting control failures*.

Risk Assessment Aids

Use the risk section of the templates to:

- Identify new risks from memos
- Track recurring issues
- Recommend mitigation vs. contingency actions

Tools You Will Produce

During Chapter 5, you will generate:

- 8 Action Plan Worksheets
- 8 Professional Communications
- Final Reflection
- Optional EVM Sheet
- Optional Progress Log

Use the resources above to ensure your deliverables are:

- Complete
- Clear
- Defensible
- Grounded in project artifacts
- Professionally written

File Naming Convention

Use the following naming format for all submissions:

CBay_MemoX_Worksheet_YourName.docx

CBay_ExecutionReflection_YourName.docx

CBay_EVM_YourName.xlsx

Tips for Success

- Look for what is *not* said in the memo
 - Missing data is often the real problem.
- Cite documents to strengthen your authority
 - Treat your response like a real PMO directive.
- Be professional but firm

- You represent C-Bay's interests — not WinSoft's.
- Always propose a next action
 - No PMO message should end with ambiguity.
- Track trends
 - Repeated issues signal systemic project weaknesses.

8: CHAPTER 6 - CLOSING THE PROJECT AND CAPTURING LESSONS

Introduction: Closing the Project & Capturing Lessons

You've guided NovaMed through planning, architecture, cost estimation, risk management, and the pressures of day-to-day execution. You've responded to vendor issues, interpreted performance metrics, escalated concerns, and maintained momentum in the face of uncertainty.

Now the project enters its final phase: **Project Closing** — the moment where leadership shifts from *driving progress* to *confirming completeness*, from *managing activity* to *verifying outcomes*, and from *problem-solving* to *knowledge capture*.

Closing a project is not administrative “cleanup.”

It is a structured, disciplined process with major implications for:

- Contractual compliance
- Vendor accountability
- System readiness
- Organizational learning
- Future project performance

Where execution tests your resilience, **closing tests your rigor**.

What Is Project Closing?

In the closing phase, the project team ensures that:

- All work has been completed
- All deliverables meet the acceptance criteria defined in the SOW
- All defects have been fixed or formally deferred
- All documentation is complete, correct, and archived
- All vendor obligations have been fulfilled
- All payments are tied to successful acceptance
- Contracts are closed in accordance with legal and financial requirements
- Knowledge, insights, and lessons are transferred back to the organization

At its core, closing answers three questions:

1. Did we build what we said we would build?
2. Was it delivered to the standard we agreed upon?
3. What can we learn from this project so the next one is better?

Why Closing Matters

Projects that skip or rush closing often struggle with:

- Missing documentation
- Unresolved defects
- Operational confusion
- Finger-pointing between teams
- Vendor disputes
- Lost knowledge
- Repeated mistakes in future projects

In contrast, strong closing processes create:

- Clear accountability
- Clean handoff to operations or customers
- Transparent evaluation of vendor performance
- High confidence in long-term system stability
- A reusable project playbook for future initiatives

Closing is how an organization **protects its investment** and **builds organizational memory**.

What You Will Do in Chapter 6

In this chapter, you will complete the project lifecycle by:

- Reviewing final deliverables against the SOW
- Verifying acceptance criteria for NovaMed Releases 1–4
- Assessing final Earned Value performance
- Preparing a Final Acceptance Summary
- Creating a formal Closeout Report
- Completing a Vendor Performance Evaluation
- Conducting a Lessons Learned Retrospective
- Documenting handoff materials for long-term owners

You will also produce a final written reflection on:

- What went well
- What you would improve
- What you learned about project leadership

The Closing Mindset

Closing is not about finding blame — it is about finding clarity.
It is the process of turning experience into expertise.

Great project managers don't merely deliver outputs —
they **leave behind systems, documents, and lessons that strengthen the entire organization**.

You are now ready to complete the NovaMed journey with confidence and professionalism.

Welcome to **Chapter 6: Closing the Project & Capturing Lessons Learned**.

[8.1: Scenario Brief](#)

[8.2: Plan of Attack](#)

[8.3: What You Will Submit](#)

[8.4: Reflection Questions and Lessons Learned](#)

[8.5: Submission Checklist and Final Assembly](#)

[8.6: Instructor Notes / Evaluation Criteria](#)

[8.7: Instructor Notes / Evaluation Criteria](#)

[8.8: Closing letter](#)

[8.9: Resource Guide for Student Success](#)

This page titled [8: Chapter 6 - Closing the Project and Capturing Lessons](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

8.1: Scenario Brief

Scenario Brief: Project Closeout Directive

Email

From: **Director of Product Delivery, C-Bay Inc.**

To: **C-Bay NovaMed PM Team**

Subject: **Task 6 – Initiating Project Closeout for NovaMed**

Team,

We are now approaching the final phase of the NovaMed Software development effort. With Release 4 submitted by WinSoft Systems and acceptance testing in progress, it is time to move into **formal project closeout**. This phase is critical: it ensures that all contractual obligations have been fulfilled, all deliverables are accounted for, and that NovaMed is ready to transition into long-term ownership.

Your work in this milestone will determine the official outcome of the project.

Your Objectives in the Closeout Phase

Over the next several “weeks” of the simulation, you will complete the following closeout tasks on behalf of C-Bay Inc.:

Review All Deliverables Against the SOW

Verify each item required by the contract and SOW, including:

- GUI & Documentation (Release 1)
- Online Product Modules (Release 2)
- Offline Product Modules (Release 3)
- Final System + Documentation (Release 4)
- Install Guide, Developer Guide, User Help
- System Test Results
- Integration Test Results
- Acceptance Test Summary

You will determine whether each deliverable is:

- Accepted
- Conditionally accepted
- Rejected with required remediation

Perform Final Performance Evaluation

Using the Reporting Guidelines and Earned Value data, evaluate:

- Cost performance at completion (CPI, EAC, VAC)
- Schedule performance at completion (SPI, SV)
- Quality and defect trends
- WinSoft reporting discipline and vendor responsiveness
- Adherence to Contract and SOW obligations

Confirm Outstanding Issues & Defects

Identify:

- Open defects requiring remediation
- Deferred defects requiring written agreement
- Documentation gaps
- Risks that must be transitioned to Operations
- Any unresolved scope or change-related conflicts

Complete Project Closeout Documentation

You will assemble:

- Final Acceptance Summary
- Closeout Checklist
- C-Bay Executive Closeout Memo
- Vendor Performance Evaluation
- Consolidated Lessons Learned Summary
- Archive Plan for all project artifacts

What You'll Receive from Us

Over the next few tasks, you will receive:

- Final deliverable summaries
- Defect reports
- Release notes
- Acceptance test results
- WinSoft closeout questionnaire
- Contract compliance status
- A final performance report from WinSoft

Each item will contain a mix of complete, incomplete, and ambiguous information.

Your responsibility is to **interpret it, verify completeness, and document final decisions.**

Your Role in This Phase

You are acting as:

- The Contract Oversight Team
- The Acceptance Authority
- The Documentation Reviewer
- The Risk & Issue Finalizer
- The Vendor Performance Evaluator
- The Organizational Knowledge Recorder

Closing NovaMed is not just an administrative step — it is a leadership responsibility. The decisions you document here form the official historical record of the project and will guide all future development and maintenance.

Timeline Expectation

All closeout tasks are expected to be completed within this chapter.

No further project work will occur.

You are responsible for ensuring the project is concluded cleanly, accurately, and in accordance with contractual terms.

Your First Closeout Deliverable

Your first task will be to **review all NovaMed deliverables against the SOW** and prepare a preliminary acceptance matrix.

Further instructions will follow.

Thank you for seeing this project through.

Let's close NovaMed with the same professionalism and clarity you have shown throughout execution.

—
Director of Product Delivery

C-Bay Inc.

8.2: Plan of Attack

Plan of Attack - Closing the Project Based Only on Weeks 1-6

In this chapter, you will complete a **project closing report** for the NovaMed Software Project based **solely on the work performed during the first six weeks** of execution. You will treat Week 6 as the “end” of the project and close it out exactly as a professional PMO would if a project was stopped prematurely.

This approach is realistic: organizations often pause, defer, or terminate projects before completion due to cost, schedule, quality, or vendor performance concerns. When a project stops early, the closeout process is **still required**—and must be conducted with the same rigor as a standard project closure.

Your job is to close NovaMed responsibly and professionally using only the data, deliverables, and issues uncovered in Weeks 1-6.

Reconstruct the Project Baseline (Using Weeks 1-6 Only)

Before closing any project—especially one halted mid-stream—you must reconstruct:

- What was expected (from Contract & SOW)
- What was actually delivered (Weeks 1-6)
- What issues and risks were identified
- What performance data is available (SPI, CPI, defects, staffing, reporting quality)

You will use:

- SOW: Expected Milestones 1-4
- Contract: Vendor responsibilities & reporting requirements
- Reporting Guidelines: Required status content
- Memo Sequence (Weeks 1-6): Execution issues
- Earned Value Template: SPI/CPI trends
- Weekly Status Template: Missing or incomplete information
- SRS & HLDD: To confirm design/functional progress

This reconstruction becomes your **foundation for the closeout report**.

Step 2 – Conduct a “Partial Project Acceptance Review”

Because the project ended at Week 6, none of the planned SOW milestones were fully completed. However, you must still determine what *state* the project ended in.

You will evaluate:

Work Completed (Week 1-6 Only)

Examples:

- Partial GUI development
- Partial SRS/HLDD updates
- Initial Online Product components (unstable)
- Early integration attempts
- Defect detection and triage

Work Not Completed

Examples:

- No completed Release 1
- Not validated documentation
- No integrated features
- No stable build

Work Quality Indicators

Using memos & reports:

- HLDD delays
- API mismatches
- DB schema inconsistencies
- Defect spikes (Week 4)
- Staff turnover (Week 5)
- Integration failures (Week 6)

Contractual Compliance

You will assess WinSoft's compliance with:

- Reporting obligations
- Weekly status report completeness
- Staffing rules
- Milestone delivery
- Process quality

This section forms the **Acceptance Assessment** portion of your closing report.

Summarize Earned Value Performance (Weeks 1–6)

Using the EVM template:

You will compute:

- PV, EV, AC for Weeks 1–6
- SV, CV
- SPI, CPI
- Trend analysis (degrading performance)

Then interpret:

- Project is behind schedule (SPI < 1.0 from early weeks)
- Project is over cost (CPI < 1.0 from Week 3 onward)
- Trends worsened (Week 6: SPI 0.68, CPI 0.71)

This becomes the **Performance Evaluation** portion of your closing report.

Finalize Outstanding Issues & Risks

You will create a **partial Defect & Issue Summary**, which only includes defects discovered up to Week 6.

This includes:

- 27 defects (Week 4)
- Integration defects (Week 6)
- Architecture inconsistencies
- Unapproved scope suggestion (Week 5)
- Staffing instability (Week 5)
- Reporting non-compliance (Week 1, 3, 6)

You will classify:

- Critical issues
- Open defects
- Issues requiring future attention
- Risks that would affect future work

This becomes the **Outstanding Issues & Risks** section of the closing report.

Conduct Preliminary Vendor Performance Evaluation

Although the project did not reach completion, you will still complete a vendor evaluation based on six weeks of behavior.

Evaluate WinSoft on:

- Schedule performance: Late HLDD, missed reporting
- Cost performance: CPI < 1.0
- Quality performance: Defect spikes, unstable builds
- Staffing discipline: Mid-level dev resignation without notice
- Reporting discipline: Missing EV, missing Bulls-Eye charts
- Communication quality: Incomplete explanations, vague updates

This becomes the **Vendor Performance Review** section.

Prepare the Project Closeout Report (Core Deliverable)

Your **Project Closeout Report** will summarize the entire six-week period:

Include:

1. Project Overview (why it stopped at Week 6)
2. Status Summary (scope/schedule/cost/quality/team snapshots)
3. Deliverables Completed vs. Planned
4. Earned Value Summary
5. Open Defects & Issues
6. Vendor Performance Evaluation
7. Contractual Compliance Review
8. Recommendation for Next Steps
 1. Continue project with changes?
 2. Pause?
 3. Terminate the vendor?
 4. Revise scope or timeline?
9. Lessons Learned

Final Deliverable Name:

CBay_NovaMed_CloseoutReport_YourName.docx

Submit the Required Deliverables

For Chapter 6, you will submit:

Required:

- ✓ Project Closeout Report
- ✓ Acceptance Matrix (Partial)
- ✓ Documentation Checklist (Partial)
- ✓ Open Defect Summary
- ✓ Final EVM Summary
- ✓ Vendor Performance Evaluation Form
- ✓ Closeout Reflection

Because project ended at Week 6:

- No Release 1–4 acceptance
- No Final Product
- No system-level testing

Your closing report reflects the reality of stopping early.

Reflect on What Project Closing Taught You

You will complete a short reflection analyzing:

- What closing a partially completed project taught you
- What you learned about vendor accountability
- How early issues compound over time
- What project signals should have been recognized earlier
- How leadership behaves when projects fail or stall

8.3: What You Will Submit

Your Final Closeout Deliverables Using Weeks 1–6 of NovaMed

For this chapter, you will complete the project closing process **as if the NovaMed project were stopped at the end of Week 6**. Your deliverables represent the official C-Bay project closeout documentation.

These materials demonstrate your ability to:

- Validate partial deliverables
- Document incomplete work
- Conduct acceptance reviews
- Evaluate vendor performance
- Summarize Earned Value performance
- Communicate final decisions with clarity
- Capture lessons learned from an early-terminated project

Below is exactly what you will submit.

Partial Acceptance Matrix (Required)

A milestone-by-milestone evaluation based **only on Weeks 1–6**.

Your matrix must include:

- Milestones (Release 1, Release 2, Release 3, Release 4, Final Acceptance)
- SOW due dates (for reference)
- Whether any deliverable progress exists
- Degree of completion at Week 6
- Acceptance Criteria met? (Yes / Conditional / No)
- Open issues or defects
- Final status (Reject, Needs Improvement, Cannot Evaluate)
- Notes based on memos, SOW, SRS, HLDD

This matrix captures the reality of early project termination.

File Name: CBay_AcceptanceMatrix_YourName.xlsx

Final Earned Value Summary (Required)

Using the EV template, compute and summarize:

- PV, EV, AC for Weeks 1–6
- SV, CV
- SPI, CPI
- EAC and VAC (even though project ended early—evaluate what it would have cost)
- Trend Interpretation
- Commentary on reporting discipline

This becomes part of your leadership-facing closeout evaluation.

File Name: CBay_EVM_FinalSummary_YourName.xlsx

Open Defect & Issue Disposition Log (Required)

Summarize all issues identified in the first six weeks:

- 27 defects (Week 4)
- Integration failures (Week 6)
- HLDD delays
- Reporting gaps
- Staffing disruption
- Unauthorized scope suggestion

For each issue defect:

- Status (Open / Deferred / Cannot Evaluate / Misaligned to requirements)
- Severity
- Impact
- Whether it prevents acceptance
- Notes for future teams

File Name:

CBay_DefectDisposition_YourName.docx

Vendor Performance Evaluation (Required)

A structured assessment of WinSoft's performance based only on:

- Schedule performance
- Cost performance (CPI trends)
- Quality (defects, stability, testing gaps)
- Reporting discipline (missing EV, missing Bulls-Eye charts, late reports)
- Staffing stability
- Adherence to Contract
- Professional communication

Provide both:

- A rating scale (Excellent → Unacceptable)
- Narrative justification

File Name:

CBay_VendorEvaluation_YourName.docx

Final Acceptance Memo (Required)

A formal acceptance OR non-acceptance memo sent to WinSoft.

It must:

- Summarize observed progress (Weeks 1–6)
- Reference Acceptance Matrix results
- State whether NovaMed is accepted, partially accepted, or rejected
- List outstanding documents and defects
- Explain conditions for future reconsideration
- Close the contract professionally

This becomes the *official written record* of C-Bay's closeout decision.

File Name:

CBay_FinalAcceptanceMemo_YourName.docx

Closeout Summary Report (Required)

A leadership-facing final report including:

Mandatory Sections

1. Executive Summary
2. Summary of Work Completed (Weeks 1–6)
3. Comparison: Planned vs. Actual (scope / schedule / cost)
4. Earned Value Summary (SPI/CPI narrative)
5. Documentation Summary
6. Open Issues & Risks
7. Vendor Performance Evaluation Summary
8. Final Acceptance Recommendation
9. Lessons Learned
10. Recommendations for future phases

File Name:

CBay_CloseoutReport_YourName.docx

Final Reflection (Required)

A 1-page reflection on:

- What closing an incomplete project taught you
- What you learned about vendor oversight
- Which issues should have been caught earlier
- What you would do differently
- How your leadership evolved

File Name:

CBay_CloseoutReflection_YourName.docx

8.4: Reflection Questions and Lessons Learned

Closing a Project Early: What Did You Learn From the First Six Weeks?

When a project ends early—whether due to performance concerns, strategic reprioritization, or quality risks—the closing phase becomes even more important. Closing NovaMed using only the first six weeks of activity forces you to evaluate not only *what was done*, but also the *conditions*, *behaviors*, and *decisions* that shaped the project.

These reflection questions will help you consolidate your learning from this entire course and extract insights that prepare you for real project leadership.

Individual Reflection Questions

Use these to guide your personal reflection or your final written submission.

What did you learn about closing a project when it has not met its milestones?

Consider how your closing mindset shifted compared to executing the project.

What issue or pattern from the first six weeks had the largest impact on the project's ability to succeed?

Was it design delays, defects, integration failures, staffing, reporting failures, or something else?

What document (SOW, Contract, SRS, HLDD, Reporting Guidelines) did you rely on most when determining acceptance or rejection? Why?

Was there a moment you realized one document was more authoritative than others?

What did the Earned Value trends (SPI/CPI) reveal that was not obvious from the memos alone?

How did quantitative data deepen or change your interpretation?

If you were restarting the project from scratch, what would you change in Weeks 1–2 to prevent the later issues?

Focus on early warning signals, overlooked risks, or miscommunications.

How did you decide which defects or issues were critical versus deferrable?

What criteria did you apply, and what rationale guided your decisions?

What did this closing exercise teach you about evaluating vendor performance fairly?

Think about balancing:

- Hard data (SPI/CPI)
- Behavior (communication, transparency)
- Deliverables (quality, completeness)
- Accountability (contract compliance)

What was the hardest part of writing the Final Acceptance Memo—accepting or rejecting the project? Why?

What leadership tension did you feel?

How has your approach to project documentation changed after preparing the acceptance matrix, verification checklist, and closeout report?

Did you gain any new appreciation for documentation as a leadership tool?

What leadership qualities do you feel you strengthened during this chapter?

Examples: clarity, tone, judgment, accountability, escalation timing.

Team Debrief Questions

If you are working with a team, use these prompts for your retrospective.

Teams often see different patterns than individuals.

Did your teammates agree on which deliverables could be accepted and which could not? Why or why not?

How did your team handle ambiguity when data was missing or inconsistent?

Real closeouts often rely on imperfect documentation.

Did your team apply consistent criteria across milestones when judging acceptance?

Or did the criteria shift as the issues escalated?

How did your team interpret “partial acceptance” in an early-terminated project?

Did you debate which conditions were reasonable?

What did your team learn about vendor management during closeout?

Especially related to:

- Communication
- Transparency
- Reporting discipline
- Responsiveness

How did your team divide the work of building the closeout report?

Did everyone understand the expectations clearly?

If C-Bay had chosen to continue the project instead of closing it, what corrective actions would your team have recommended?

This assesses what you learned from execution.

Patterns to Watch (Closeout Phase)

Patterns to Watch

Pattern	Signal	What It Means	PM Lesson
“We don’t know what’s missing.”	Incomplete documentation	WinSoft did not maintain document discipline	Strengthen doc control early
“Everything looks partially done.”	No deliverable meets full criteria	Underestimation of scope/effort	Tighten milestone definition
“CPI/SPI stayed <1.0 for weeks.”	Negative trends in <u>EVM</u>	Systemic issues, not random events	Address root cause early
“We can’t determine acceptance.”	Ambiguous deliverables	<u>SOW</u> lacked clarity or vendor deviated	Improve acceptance criteria

Optional Final Reflection Prompt

“Closing NovaMed at Week 6 taught me that project success depends as much on clarity and compliance as it does on technical skill. The moment that defined the closing phase for me was _____. This revealed to me that in project leadership, _____. Next time, I will take the following steps earlier: _____.”

Why This Reflection Matters

This chapter completes the full project management lifecycle.

Your ability to:

- Analyze incomplete work
- Interpret performance
- Document acceptance decisions
- Evaluate vendor behavior
- Capture lessons for the next project

...demonstrates that you are thinking like a **project leader**, not just a student.

Closing the project solidifies your understanding of how to manage work from start to finish—even when the finish line arrives sooner than expected.

8.5: Submission Checklist and Final Assembly

Before You Submit Your Closeout Package, Review This Checklist Carefully

Your Chapter 6 deliverables complete the NovaMed Project Closeout based only on the first six weeks of execution. The quality of your closeout package depends not only on what you include, but on how well you assemble, justify, and organize your materials.

Use this checklist to ensure that your final submission is complete, coherent, and professional.

Required Deliverables (Must Submit All)

Partial Acceptance Matrix

Your matrix must include:

- Milestones (Release 1–4 + Final Acceptance)
- SOW due dates (for context)
- Delivery status at Week 6
- Acceptance status (Accept / Conditional / Reject / Cannot Evaluate)
- Notes referencing SOW, SRS, HLDD, or memos

File Name:

CBay_AcceptanceMatrix_YourName.xlsx

Documentation Verification Checklist

Includes:

- Required documentation (User Manual, Install Manual, Developer Manual, testing results, release notes, etc.)
- Status: Delivered / Partial / Missing
- Notes on completeness & accuracy

File Name:

CBay_DocumentationChecklist_YourName.docx

Final Earned Value Summary

Using Weeks 1–6 only:

- PV, EV, AC
- SV, CV
- SPI, CPI
- EAC, VAC
- Final interpretation of project performance

File Name:

CBay_EVM_FinalSummary_YourName.xlsx

Open Defect & Issue Disposition Log

Lists all known issues from Weeks 1–6:

- Defects from Week 4 memo
- Integration failures (Week 6)
- HLDD delay (Week 2)
- Reporting failures
- Unauthorized scope change
- Staffing departure

Includes disposition: Fix Now / Defer / Reject / Needs Clarification.

File Name:

CBay_DefectDisposition_YourName.docx

Vendor Performance Evaluation

Evaluate WinSoft based on:

- Schedule discipline
- Cost performance
- Reporting quality
- Communication & transparency
- Deliverable quality
- Responsiveness
- Adherence to Contract & SOW

File Name:

CBay_VendorEvaluation_YourName.docx

Final Acceptance Memo

A decision memo from C-Bay to WinSoft:

- Accept / Cannot Accept
- Basis of your decision
- Defects preventing acceptance
- Outstanding documentation
- Any required future actions
- Contractual closing language

File Name:

CBay_FinalAcceptanceMemo_YourName.docx

Closeout Summary Report

Your leadership-facing summary, including:

- Executive Summary
- What was planned vs. what was achieved (Weeks 1–6)
- EVM analysis
- Key issues & defects
- Acceptance conclusions
- Vendor performance overview
- Lessons learned
- Recommendations for future action

File Name:

CBay_CloseoutReport_YourName.docx

Final Reflection

Your 1-page personal reflection on:

- What you learned
- How execution issues shape closing decisions
- How you evaluated acceptance criteria
- What you would do differently as a project leader

File Name:

CBay_CloseoutReflection_YourName.docx

Quality Assurance Checklist (Final Review Before Submission)

Completeness

- All 8 required deliverables included
- All files open correctly
- Naming convention followed

Documentation Alignment

- Acceptance decisions reference SOW & SRS
- Vendor evaluation references Contract & memos
- EVM summary matches Weeks 1–6 numbers
- Defects categorized correctly
- Documentation checklist reflects Week 6 reality

Professional Tone

- Final Acceptance Memo reads like a leadership communication
- No informal tone, emotional language, or unsupported claims
- Recommendations are actionable and justified

Accuracy & Insight

- Earned Value interpretation is consistent
- Closeout report synthesizes data coherently

- Reflection demonstrates real learning

What “Excellent” Work Looks Like

A top-scoring submission will:

- Identify patterns across the six weeks
- Reference the proper contract/SOW sections
- Use defect & EVM data to justify decisions
- Provide a realistic and constructive vendor evaluation
- Communicate clearly and professionally
- Show leadership-level insight in the reflection

8.6: Instructor Notes / Evaluation Criteria

How to Evaluate Student Closeout Deliverables (Weeks 1–6 Only)

Closing the NovaMed project at Week 6 provides a realistic simulation of early project termination—one of the most complex scenarios a project manager may face. Students must demonstrate the ability to:

- Analyze partial, inconsistent, incomplete deliverables
- Interpret Earned Value trends
- Apply contractual requirements
- Make defensible acceptance decisions
- Evaluate vendor performance objectively
- Communicate decisions with clarity and authority
- Document the project clearly and professionally

The following criteria will help instructors evaluate the Chapter 6 submissions consistently and fairly.

Overview for Instructors

- Students submit the following key artifacts:
- Acceptance Matrix (Partial)
- Documentation Verification Checklist
- Earned Value Final Summary
- Defect/Issue Disposition Log
- Vendor Performance Evaluation
- Final Acceptance Memo
- Closeout Summary Report
- Final Reflection
 - These must be evaluated not just for content accuracy, but also for:
 - Correct interpretation of project documents
 - Professional communication standards
 - Logical reasoning and defensible decisions
 - Alignment with PM best practices

Evaluation Categories (Weighted Rubric) - Suggested

This rubric is recommended for standardizing evaluation across instructors.

Acceptance Matrix Quality (20%)

Evaluate whether the student:

- Correctly interpreted SOW milestones
- Identified which deliverables were incomplete (all)
- Documented partial work accurately
- Classified acceptance status correctly:
 - Accept
 - Conditional Accept
 - Reject
 - Cannot Evaluate
- Provided evidence for decisions based on Weeks 1–

High Score Characteristics:

- Student references specific criteria from SOW/SRS/HLDD
- Clear, justified acceptance decisions
- Matrix is organized, readable, and internally consistent

Documentation Verification Checklist (10%)

Evaluate whether the student:

- Correctly classified documentation as Partial / Missing / Not Delivered
- Identified specific gaps (e.g., no integration test results, no manuals)
- Noted inconsistencies between documentation and progress
- Included brief but accurate reasoning

High Score Characteristics:

- Well-structured checklist
- Shows awareness of missing artifacts
- Connects documentation gaps to quality or acceptance risks

Earned Value Analysis (15%)

Students should:

- Calculate accurate SPI/CPI for Weeks 1–6
- Note declining performance trends
- Identify that the project was behind schedule and over cost
- Provide a final interpretation:
 - $CPI < 1.0$
 - $SPI < 1.0$
 - Negative trajectory

High Score Characteristics:

- EVM table is correct
- Trend commentary is insightful
- Student uses EAC/VAC appropriately (even though project halted early)
- Comments show understanding of early performance indicators

Defect/Issue Disposition Log (10%)

Evaluate whether the student:

- Captured all issues from memos (Week 4 defects, Week 6 integration failures, staffing problems, reporting issues, HLDD delays)
- Classified severity accurately
- Provided reasonable dispositions (Fix Now / Defer / Cannot Evaluate)
- Understood downstream impact of critical issues

High Score Characteristics:

- Clear categorization
- Accurate defect severity level
- Reasonable, defensible disposition choices

Vendor Performance Evaluation (15%)

Students must assess WinSoft fairly using:

- Schedule performance
- Cost performance (CPI)
- Reporting compliance
- Staffing stability
- Quality of deliverables
- Responsiveness and transparency
- Adherence to Contract & SOW

High Score Characteristics:

- Evaluation is data-driven (not emotional)
- References contract obligations
- Balanced strengths and weaknesses
- Final vendor rating is justified

Final Acceptance Memo (15%)

Students must write a clear, professional acceptance decision:

- Acceptance or non-acceptance (typically non-acceptance)
- Reasons tied to evidence
- Contractual references
- Clear conditions or next steps
- Appropriate professional tone

High Score Characteristics:

- Executive-level tone
- Clear logic
- Contractually grounded
- No informal or emotional language

Closeout Summary Report (10%)

This is the “capstone” deliverable. Evaluate:

- Structure and clarity
- Completeness of required sections
- Accuracy in summarizing 6-week progress
- Insight into root causes
- Quality of recommendations
- Internal consistency across all documents

High Score Characteristics:

- Reads like a real PMO closeout report
- Contains data-driven conclusions
- Demonstrates mature project leadership judgment

Instructor Notes for Evaluating Judgment

Execution-phase and closeout work rely heavily on judgment. Here are common red flags and strong indicators of mastery.

Common Student Errors (Red Flags)

- Over-accepting items that clearly fail SOW criteria

- Failing to reference SOW/Contract clauses
- Acceptance decisions based on hope rather than evidence
- Ignoring Earned Value trends
- Underestimating the impact of the HLDD delay
- Ignoring staffing violations (contract breach)
- Overlooking serious defects
- Writing acceptance memos with vague or emotional tone
- Confusing “deliverable exists” with “deliverable meets criteria”

Indicators of Strong Mastery

- Student identifies patterns across memos (e.g., consistent underperformance)
- Student cross-links SOW + Contract + Reporting Guidelines
- Final Acceptance Memo is written at a leadership-ready level
- Closeout Report shows systems thinking
- Earned Value narrative shows deep understanding
- Defect disposition aligns with severity and impact
- Vendor evaluation uses qualitative + quantitative evidence
- Reflection shows genuine ownership of learning

Recommended Scoring Grid (100 Points Total)

Recommended Scoring Card

Category	Points
Acceptance Matrix	20
Documentation Checklist	10
Earned Value Summary	15
Defect/Issue Log	10
Vendor Evaluation	15
Final Acceptance Memo	15
Closeout Report	10
Final Reflection	5

Instructor Teaching Notes

- Encourage students to treat Week 6 as a hard stop.
- Emphasize that closing a failing or incomplete project is a real skill.
- Prompt them to defend decisions with SOW/Contract citations.
- Highlight that Earned Value provides objective evidence even when memos are subjective or incomplete.
- Reinforce that quality documentation is part of the acceptance criteria.
- Remind them that tone and professionalism matter just as much as analysis.

Final Note for Instructors

Closing a partly completed project reveals a student’s capacity to:

- Lead with structure
- Think critically under ambiguity
- Communicate with authority
- Protect organizational interests
- Transform scattered data into aligned decisions

This chapter is not just the end of NovaMed — it is the measure of their professional readiness.

This page titled [8.6: Instructor Notes / Evaluation Criteria](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

8.7: Instructor Notes / Evaluation Criteria

Instructor Notes / Evaluation Criteria

How to Evaluate Student Closeout Deliverables (Weeks 1–6 Only)

Closing the NovaMed project at Week 6 provides a realistic simulation of early project termination—one of the most complex scenarios a project manager may face. Students must demonstrate the ability to:

- Analyze partial, inconsistent, incomplete deliverables
- Interpret Earned Value trends
- Apply contractual requirements
- Make defensible acceptance decisions
- Evaluate vendor performance objectively
- Communicate decisions with clarity and authority
- Document the project clearly and professionally

The following criteria will help instructors evaluate the Chapter 6 submissions consistently and fairly.

1. Overview for Instructors

Students submit the following key artifacts:

✓ Acceptance Matrix (Partial)

✓ Documentation Verification Checklist

✓ Earned Value Final Summary

✓ Defect/Issue Disposition Log

✓ Vendor Performance Evaluation

✓ Final Acceptance Memo

✓ Closeout Summary Report

✓ Final Reflection

These must be evaluated not just for content accuracy, but also for:

- Correct interpretation of project documents
- Professional communication standards
- Logical reasoning and defensible decisions
- Alignment with PM best practices

2. Evaluation Categories (Weighted Rubric)

This rubric is recommended for standardizing evaluation across instructors.

A. Acceptance Matrix Quality (20%)

Evaluate whether the student:

- Correctly interpreted SOW milestones
- Identified which deliverables were incomplete (all)
- Documented partial work accurately
- Classified acceptance status correctly:
 - Accept
 - Conditional Accept
 - Reject
 - Cannot Evaluate
- Provided evidence for decisions based on Weeks 1–6

High Score Characteristics:

- Student references specific criteria from SOW/SRS/HLDD
- Clear, justified acceptance decisions
- Matrix is organized, readable, and internally consistent

B. Documentation Verification Checklist (10%)

Evaluate whether the student:

- Correctly classified documentation as Partial / Missing / Not Delivered
- Identified specific gaps (e.g., no integration test results, no manuals)
- Noted inconsistencies between documentation and progress
- Included brief but accurate reasoning

High Score Characteristics:

- Well-structured checklist
- Shows awareness of missing artifacts
- Connects documentation gaps to quality or acceptance risks

C. Earned Value Analysis (15%)

Students should:

- Calculate accurate SPI/CPI for Weeks 1–6
- Note declining performance trends
- Identify that the project was behind schedule and over cost
- Provide a final interpretation:
 - $CPI < 1.0$
 - $SPI < 1.0$
 - Negative trajectory

High Score Characteristics:

- EVM table is correct
- Trend commentary is insightful

- Student uses EAC/VAC appropriately (even though project halted early)
- Comments show understanding of early performance indicators

D. Defect/Issue Disposition Log (10%)

Evaluate whether the student:

- Captured all issues from memos (Week 4 defects, Week 6 integration failures, staffing problems, reporting issues, HLDD delays)
- Classified severity accurately
- Provided reasonable dispositions (Fix Now / Defer / Cannot Evaluate)
- Understood downstream impact of critical issues

High Score Characteristics:

- Clear categorization
- Accurate defect severity level
- Reasonable, defensible disposition choices

E. Vendor Performance Evaluation (15%)

Students must assess WinSoft fairly using:

- Schedule performance
- Cost performance (CPI)
- Reporting compliance
- Staffing stability
- Quality of deliverables
- Responsiveness and transparency
- Adherence to Contract & SOW

High Score Characteristics:

- Evaluation is data-driven (not emotional)
- References contract obligations
- Balanced strengths and weaknesses
- Final vendor rating is justified

F. Final Acceptance Memo (15%)

Students must write a clear, professional acceptance decision:

- Acceptance or non-acceptance (typically non-acceptance)
- Reasons tied to evidence
- Contractual references
- Clear conditions or next steps
- Appropriate professional tone

High Score Characteristics:

- Executive-level tone
- Clear logic
- Contractually grounded
- No informal or emotional language

G. Closeout Summary Report (10%)

This is the “capstone” deliverable. Evaluate:

- Structure and clarity
- Completeness of required sections
- Accuracy in summarizing 6-week progress
- Insight into root causes
- Quality of recommendations
- Internal consistency across all documents

High Score Characteristics:

- Reads like a real PMO closeout report
- Contains data-driven conclusions
- Demonstrates mature project leadership judgment

3. Instructor Notes for Evaluating Judgment

Execution-phase and closeout work rely heavily on judgment. Here are common red flags and strong indicators of mastery.

Common Student Errors (Red Flags)

- Over-accepting items that clearly fail SOW criteria
- Failing to reference SOW/Contract clauses
- Acceptance decisions based on hope rather than evidence
- Ignoring Earned Value trends
- Underestimating the impact of the HLDD delay
- Ignoring staffing violations (contract breach)
- Overlooking serious defects
- Writing acceptance memos with vague or emotional tone
- Confusing “deliverable exists” with “deliverable meets criteria”

Indicators of Strong Mastery

- Student identifies patterns across memos (e.g., consistent underperformance)
- Student cross-links SOW + Contract + Reporting Guidelines
- Final Acceptance Memo is written at a leadership-ready level
- Closeout Report shows systems thinking
- Earned Value narrative shows deep understanding
- Defect disposition aligns with severity and impact
- Vendor evaluation uses qualitative + quantitative evidence
- Reflection shows genuine ownership of learning

4. Recommended Scoring Grid (100 Points Total)

Recommended Scoring Grid

Category	Points
Acceptance Matrix	20
Documentation Checklist	10
Earned Value Summary	15

Category	Points
Defect/Issue Log	10
Vendor Evaluation	15
Final Acceptance Memo	15
Closeout Report	10
Final Reflection	5

5. Instructor Teaching Notes

- Encourage students to treat Week 6 as a hard stop.
- Emphasize that closing a failing or incomplete project is a real skill.
- Prompt them to defend decisions with SOW/Contract citations.
- Highlight that Earned Value provides objective evidence even when memos are subjective or incomplete.
- Reinforce that quality documentation is part of the acceptance criteria.
- Remind them that tone and professionalism matter just as much as analysis.

6. Final Note for Instructors

Closing a partly completed project reveals a student's capacity to:

- Lead with structure
- Think critically under ambiguity
- Communicate with authority
- Protect organizational interests
- Transform scattered data into aligned decisions

This chapter is not just the end of NovaMed — it is the measure of their professional readiness.

8.8: Closing letter

You Have Learned to Lead in Complexity

Dear Practitioner,

You've reached the end of Chapter 6 — and with it, the completion of the NovaMed Project Practicum. Whether you expected it or not, this chapter asked you to do something most textbooks never dare to ask: **to close a project that didn't go as planned.**

That's what makes your work here meaningful.

You didn't just practice project management under perfect conditions.

You practiced leadership in uncertainty.

You evaluated incomplete deliverables.

You made decisions without all the answers.

You communicated with professionalism under pressure.

You analyzed data even when it raised hard truths.

You documented findings knowing that someone else — a leader, a stakeholder, an organization — would rely on your judgment.

And that is project management in the real world.

Projects don't always finish cleanly.

Teams don't always deliver what they promise.

Vendors don't always perform as expected.

Plans don't always survive reality.

But leaders — real leaders — show up anyway.

They bring structure.

They bring clarity.

They bring accountability.

They bring closure.

And that is exactly what you've practiced in this chapter.

You closed the NovaMed project not with frustration, but with discipline. You evaluated WinSoft fairly, even when the results were uncomfortable. You made informed acceptance decisions. You organized evidence. You wrote with confidence. You delivered a complete closeout package that mirrors what a real PMO would expect in industry.

Most importantly, you strengthened the skills that matter most:

- clear communication
- critical thinking
- professional tone
- analytical decision-making
- ethical judgment
- leadership maturity

You've gained something rare — not just knowledge, but the **experience of being responsible** for a project.

Carry that forward.

As you move beyond this chapter, remember:

Every project you will ever lead — in school, in work, or in life — will demand the same habits you built here:

Be organized.

Be calm.
Be curious.
Be honest about the facts.
Protect your scope, your team, your quality, your budget, your schedule — and your integrity.
And above all, be willing to close chapters with clarity, even when they're incomplete.

You've reached the end of NovaMed.
But your journey as a project leader is just beginning.

I'm proud of the work you've done.
I'm proud of the judgment you've built.
And I'm excited for the leader you're becoming.

With respect and belief in your future,

Sukhjīt (Bob) Singh

Project Management – A Practicum

8.9: Resource Guide for Student Success

This page titled [8.9: Resource Guide for Student Success](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjot "Bob" Singh.

INDEX

No index terms found.

GLOSSARY

S

Sample Word 1 | Sample Definition 1

This page titled [Glossary](#) is shared under a [CC BY 4.0](#) license and was authored, remixed, and/or curated by Sukhjrit "Bob" Singh.

DETAILED LICENSING

Overview

Title: Project Management - A Practicum

Webpages: 94

All licenses found:

- [CC BY 4.0](#): 94.7% (89 pages)
- [Public Domain](#): 5.3% (5 pages)

By Page

- Project Management - A Practicum - [CC BY 4.0](#)
 - Front Matter - [CC BY 4.0](#)
 - Project Management - A Practicum - [CC BY 4.0](#)
 - Info Page - [Public Domain](#)
 - Table of Contents - [Public Domain](#)
 - Program Page - [Public Domain](#)
 - Accessibility Statement - [Public Domain](#)
 - AI Use - [CC BY 4.0](#)
 - About the Book - [CC BY 4.0](#)
 - Welcome Letter - [CC BY 4.0](#)
 - How to use this book? - [CC BY 4.0](#)
 - How was this book created? - [CC BY 4.0](#)
 - Motivational Message for the first day of class. - [CC BY 4.0](#)
 - Meet the Author - [CC BY 4.0](#)
 - Licensing - [CC BY 4.0](#)
 - 1: Foundations of Project Management - [CC BY 4.0](#)
 - 1.1: Preface - [CC BY 4.0](#)
 - 1.2: How to Use This Book - [CC BY 4.0](#)
 - 1.3: Overview - [CC BY 4.0](#)
 - 1.4: Problem Based Learning - [CC BY 4.0](#)
 - 1.5: Your Role - [CC BY 4.0](#)
 - 1.6: Tools And Resources - [CC BY 4.0](#)
 - 1.7: Grading and Assessment Overview - [CC BY 4.0](#)
 - 1.8: Collaboration and Integrity - [CC BY 4.0](#)
 - 1.9: Problem Based Student Guide - [CC BY 4.0](#)
 - 1.10: Overview of C-Bay - [CC BY 4.0](#)
 - 1.11: Forming Teams for the Practicum - [CC BY 4.0](#)
 - 2: Chapter 0 - Role of PM - [CC BY 4.0](#)
 - 2.1: Welcome to the Role of PM (The Setup) - [CC BY 4.0](#)
 - 2.2: Plan of Attack - [CC BY 4.0](#)
 - 2.3: Learning Resources - [CC BY 4.0](#)
 - 2.4: What You Will Submit - [CC BY 4.0](#)
 - 2.5: Reflection and Debrief - [CC BY 4.0](#)
 - 2.6: Submission Checklist - [CC BY 4.0](#)
 - 2.7: Instructor Notes / Evaluation Criteria - [CC BY 4.0](#)
 - 3: Chapter 1 - Project Initiation - [CC BY 4.0](#)
 - 3.1: Scenario Brief - [CC BY 4.0](#)
 - 3.2: Plan of Attack - [CC BY 4.0](#)
 - 3.3: What You Will Submit - [CC BY 4.0](#)
 - 3.4: Reflection Questions and Lessons Learned - [CC BY 4.0](#)
 - 3.5: Submission Checklist and Final Assembly - [CC BY 4.0](#)
 - 3.6: Instructor Notes / Evaluation Criteria - [CC BY 4.0](#)
 - 3.7: Transition - [CC BY 4.0](#)
 - 3.8: Resource Guide for Student Success - [CC BY 4.0](#)
 - 4: Chapter 2 - Defining Scope and Success - [CC BY 4.0](#)
 - 4.1: Scenario Brief - [CC BY 4.0](#)
 - 4.2: Plan of Attack - [CC BY 4.0](#)
 - 4.3: What You Will Submit - [CC BY 4.0](#)
 - 4.4: Reflection Questions and Lessons Learned - [CC BY 4.0](#)
 - 4.5: Submission Checklist and Final Assembly - [CC BY 4.0](#)
 - 4.6: Instructor Notes / Evaluation Criteria - [CC BY 4.0](#)
 - 4.7: Transition - [CC BY 4.0](#)
 - 4.8: Resource Guide for Student Success - [CC BY 4.0](#)
 - 5: Chapter 3- Estimating Schedule, Costs and Building the Budget - [CC BY 4.0](#)
 - 5.1: Scenario Brief - [CC BY 4.0](#)
 - 5.2: Plan of Attack - [CC BY 4.0](#)
 - 5.3: What You Will Submit - [CC BY 4.0](#)
 - 5.4: Reflection Questions and Lessons Learned - [CC BY 4.0](#)
 - 5.5: Submission Checklist and Final Assembly - [CC BY 4.0](#)
 - 5.6: Submission Checklist and Final Assembly - [CC BY 4.0](#)
 - 5.7: Transition - [CC BY 4.0](#)
 - 5.8: Resource Guide for Student Success - [CC BY 4.0](#)

- BY 4.0*
- 6: Chapter 4 – Identifying Risks and Planning for Change - *CC BY 4.0*
 - 6.1: Scenario Brief - *CC BY 4.0*
 - 6.2: Plan of Attack - *CC BY 4.0*
 - 6.3: What You Will Submit - *CC BY 4.0*
 - 6.4: Reflection Questions and Lessons Learned - *CC BY 4.0*
 - 6.5: Submission Checklist and Final Assembly - *CC BY 4.0*
 - 6.6: Instructor Notes / Evaluation Criteria - *CC BY 4.0*
 - 6.7: Transition - *CC BY 4.0*
 - 6.8: Resource Guide for Student Success - *CC BY 4.0*
- 7: Chapter 5 – Project Execution - *CC BY 4.0*
 - 7.1: Scenario Brief - *CC BY 4.0*
 - 7.2: Plan of Attack - *CC BY 4.0*
 - 7.3: What You Will Submit and Memo Sequence - *CC BY 4.0*
 - 7.4: Reflection Questions and Lessons Learned - *CC BY 4.0*
 - 7.5: Submission Checklist and Final Assembly - *CC BY 4.0*
 - 7.6: Instructor Notes / Evaluation Criteria - *CC BY 4.0*
- BY 4.0*
- 7.7: Transition - *CC BY 4.0*
- 7.8: Resource Guide for Student Success - *CC BY 4.0*
- 8: Chapter 6 – Closing the Project and Capturing Lessons - *CC BY 4.0*
 - 8.1: Scenario Brief - *CC BY 4.0*
 - 8.2: Plan of Attack - *CC BY 4.0*
 - 8.3: What You Will Submit - *CC BY 4.0*
 - 8.4: Reflection Questions and Lessons Learned - *CC BY 4.0*
 - 8.5: Submission Checklist and Final Assembly - *CC BY 4.0*
 - 8.6: Instructor Notes / Evaluation Criteria - *CC BY 4.0*
 - 8.7: Instructor Notes / Evaluation Criteria - *CC BY 4.0*
 - 8.8: Closing letter - *CC BY 4.0*
 - 8.9: Resource Guide for Student Success - *CC BY 4.0*
- Back Matter - *CC BY 4.0*
 - Index - *Public Domain*
 - Glossary - *CC BY 4.0*
 - Detailed Licensing - *CC BY 4.0*