CHAPTER 3: MANAGING IMPLEMENTATION PROJECTS

Objectives

The objectives are:

- Describe common problems that occur in implementation projects.
- Describe the project management components supported by Microsoft Dynamics® Sure Step.
- Describe how project management tasks are integrated into each phase in Microsoft Dynamics Sure Step.
- Describe the project management disciplines supported by Microsoft Dynamics Sure Step.
- Describe the project management processes supported by Microsoft Dynamics Sure Step and describe how those processes align with the implementation phases.
- Describe the cross phase processes supported by Microsoft Dynamics Sure Step.
- Identify the project management deliverables created during a Microsoft Dynamics implementation project.
- Use project management tools and templates that are provided by Microsoft Dynamics Sure Step.
- Describe the organizational change management disciplines supported by Microsoft Dynamics Sure Step.
- Use the Project Repository feature to organize and share project documents.
- Apply best practices for managing implementation projects using Microsoft Dynamics Sure Step.

Introduction

Project management is an important factor in successful Microsoft Dynamics implementation projects. In feedback gathered from Microsoft Dynamics partners and consultants, a common reason that implementation projects fail or do not meet customer expectations is the lack of consistent, disciplined project management.

To address this, Microsoft Dynamics Sure Step integrates several project management-specific features and components to help effectively manage implementation projects. It is important to be aware of the effect of project management activities and how these activities interact and overlap with the technical activities in the implementation phases.

Common Problems in Implementation Projects

Problems in Microsoft Dynamics implementation projects frequently result from ineffective or nonexistent project management. Although most implementation projects have strong technical consultants, the lack of a good project manager can lead to cost overruns, missed deadlines, unrealistic customer expectations, and solutions that do not effectively address business requirements. Common problems in implementation projects for business solutions include the following:

- Poor risk management.
- Not clearly defining and documenting the scope of the project which frequently results in "scope creep."
- Not communicating or effectively identifying issues, and not defining a protocol for escalating project issues.
- Poor project communications and relationship management.
- Ineffectively managing and forecasting time and resource requirements, which result in schedule and cost overruns. Schedule problems also result from not using buffers in the project schedule.
- Ineffectively managing costs, including incorrect budgeting and the lack of cost containment protocols.
- Ineffectively managing project team members and insufficiently skilled team members.
- Insufficient quality management that results in poor quality or unplanned rework.
- Poor procurement management, resulting in delayed or unplanned purchases that can impede project progress.
- Overselling during the Sales process, which sets unrealistic expectations for the implementation project.
- Lack of knowledge of the wider project environment, such as unawareness of stakeholder perspectives and needs.

A common cause of these project problems is the failure to effectively manage and control three key elements: scope, schedule, and cost. Failure to effectively manage these typically results in missed opportunities to set realistic expectations and ultimately the customer's dissatisfaction with the Microsoft Dynamics products, and possibly, with the organization as a partner.

Without strong, consistent project management leadership, implementation projects are at risk of failing or, at best, not satisfying the customer's expectation for the Microsoft Dynamics solution.

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Project Management Components in Microsoft Dynamics Sure Step

Microsoft Dynamics Sure Step provides many project management components and features to help project managers manage Microsoft Dynamics implementation projects. This project management support is broadly (across all phases) and deeply (within a single cross phase) integrated in Microsoft Dynamics Sure Step.

Microsoft Dynamics Sure Step provides the following project management components:

- Project management tasks
- Project management disciplines
- Project management processes
- Cross phase processes
- Project management deliverables
- Project management tools and templates

Microsoft Dynamics Sure Step also provides additional discipline guidance for organizational change management.

Project Management Tasks

Each phase of the methodology contains tasks specific to project management. Microsoft Dynamics Sure Step integrates these tasks with the other implementation tasks that comprise the activities in each phase. A project manager performs these tasks at several points within each phase in the methodology.

Project Management Disciplines

Project management disciplines span multiple phases of the methodology. Each discipline consists of tasks in a specific knowledge area of project management that a project manager performs throughout the life cycle of an implementation project. Microsoft Dynamics Sure Step provides specific guidance on when to perform a task in a specific discipline.

Project Management Processes

Microsoft Dynamics Sure Step supports three groups of related project management tasks that correspond to different points in the life cycle of an implementation project. These processes provide a view that organizes project management tasks into the following groups:

- Project initiation and planning

- Project execution and monitoring
- Project closing

The goal of these specific views of project management activities is to provide project managers with task-based guidance when starting, executing, and closing a project.

Cross Phase Processes

Microsoft Dynamics Sure Step identifies a group of key implementation processes that span multiple phases. Each of these processes consists of a group of related activities and tasks performed in different phases in the methodology. The purpose of the cross phase process is to divide a key implementation process into its tasks, describe the tasks, and then show the sequence in which those tasks are performed in the implementation life cycle. This view provides an effective way for project managers to plan, verify, and execute the tasks for a specific implementation process.

Project Management Deliverables

Microsoft Dynamics Sure Step incorporates several project management deliverables into the implementation phases. These deliverables frequently capture or summarize the results of the project management tasks performed in each phase. Both the project management tasks integrated into each phase and the tasks in each project management discipline provide pointers to these deliverables.

Project Management Tools and Templates

Microsoft Dynamics Sure Step provides tools and templates to perform project management tasks and to create project management deliverables. Under the Project Management Library node, on the Disciplines page, all the project management templates can be organized by project management discipline.

Organizational Change Management Disciplines

Organizational Change Management (OCM) works with the process, requirements, sponsors, extended teams and end-user communities to ensure a successful adoption of the solution. The approach of OCM is organized into four areas:

- Executive and Stakeholder Engagement
- Organizational Alignment and Mobilization
- Communications
- Training

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Integration of Project Management Tasks

In each phase of Microsoft Dynamics Sure Step, project management tasks can be embedded into the activities that comprise each phase. This is an example of "deep" integration of project management components within the methodology. A project manager performs these tasks at several points within each phase in the methodology.

The following process describes how these project management tasks integrate into an implementation phase:

- **Project planning**: Each implementation phase in the methodology begins with an activity to plan that phase of the project. The purpose of this activity is to refine the overall plan, and develop the details to guide the team in executing the phase activities. This planning also helps set expectations for the team and the customer. These planning tasks can include the following based on project type and needs:
- Reviewing deliverables from the previous phase.
- Assigning resources for the work that is performed in the phase.
- Determining approval responsibilities.
- Creating a detailed plan for the activities and tasks that are performed in the phase.
- Conducting a kick off meeting with the project team (consultants and customers) for the phase. This activity cannot be performed for small projects such as Rapid implementations.

Execute the remaining phase activities: After the planning activity, the phase continues with the technical and functional work that comprises the core purpose of the phase. Project communications such as reports and meetings are also part of the project execution. Be aware that some project management tasks can also be embedded in these primary activities.

- **Update project-planning documents**: Because of any changes that can result after conducting the phase activities, the project manager updates project planning documents, such as the risk register, the project scope document, and the project plan. These updated documents provide accurate guidance in the next phase of the methodology.
- **Proposal management**: All phases in the methodology have a proposal management activity that results in:
  - Preparing and presenting a proposal or customer sign-off document.
  - Negotiating and obtaining the customer's approval of the proposal.
  - Having the customer sign-off on the satisfactory completion of the phase.

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Project Management Disciplines

The Disciplines section in Microsoft Dynamics Sure Step organizes project management tasks into specific knowledge areas. This view provides detailed how-to information about performing project management tasks.

The Project Management Discipline section contains the following:

- **Risk management**: Use to manage risks to influence the probability of occurrence and their impact on the project objectives like cost, schedule, and quality.
- **Scope management**: Use to plan and manage the project scope across the project life cycle.
- **Issue management**: Use to plan and manage issues that occur throughout the project.
- **Time and cost management**: Use to initiate, control, and manage time and cost to help ensure that the project finishes on time and within budget.
- **Resource management**: Use to plan and manage all involved in human resources, equipment resources, and material resources.
- **Communication management**: Use to plan and manage communications throughout the project.
- **Quality management**: Use to maintain a certain level of quality for the project deliverables and performance that meet the customer's expectations.
- **Procurement management**: Use to manage purchases and acquisitions of services and deliverables to fulfill the project requirements.
- **Sales management**: Use to plan, align, and coordinate the sales activities with the Diagnostic activities to create a proposal that addresses the customer's requirements.

***NOTE**: The task pages in each Discipline section provide the most detailed and prescriptive descriptions about how to perform a specific project management task. In addition, the Tools and Templates section on task pages provides links to the corresponding templates that are used when performing the task.*

Project Management Processes

Project management processes provide prescriptive guidance for starting, executing, and closing an implementation project. These processes organize tasks from each project management discipline into the following groups:

- Project initiation and planning

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- Project execution and monitoring
- Project closing

Project management processes also align with the phases in the implementation methodology:

- Project initiation and planning tasks occur primarily during the Diagnostic phase and the beginning of Analysis.
- Ongoing project execution and monitoring tasks occur during Analysis, Design, Development, and the early Deployment activities.
- Project closing tasks start during Deployment and continue through the Operations phase and the end of the project.

The primary advantage of this alignment is prescribing what project management tasks to perform at various stages in the implementation project. Because each implementation project is different, the project manager, in collaboration with the project team, must determine which tasks from the project management process to perform and the degree of detail to complete each task.

The figure shows how Microsoft Dynamics Sure Step organizes tasks from the project management disciplines within the three groups of project management processes.

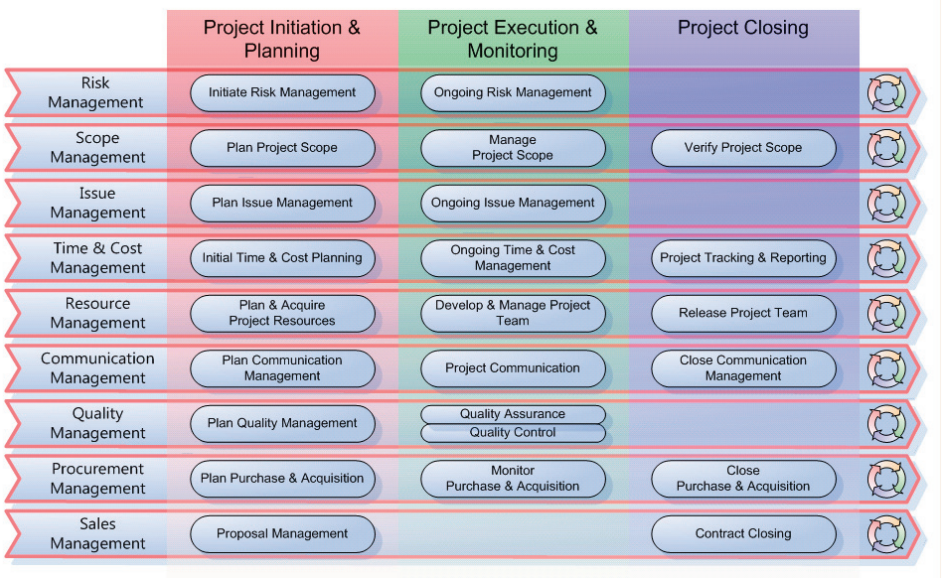

FIGURE 3.1 – PROJECT MANAGEMENT PROCESSES

***TIP**: Under the Processes section in Microsoft Dynamics Sure Step, clicking a task in the process diagram displays the page for that task under the corresponding project management discipline.*

Cross Phase Processes

The Cross Phase Processes section is a group of related activities in the Microsoft Dynamics Sure Step Methodology that span multiple implementation phases in a project. This view shows the tasks included in the process, and the phase each activity or task is performed. Project managers can use the cross phase processes view for an overview of related activities when they create a project plan and scheduling resources.

The Cross Phase Processes section includes the following:

- Program management
- Training
- Business process analysis
- Requirements and configuration
- Custom coding
- Quality and testing
- Infrastructure
- Integration and interfaces
- Data migration

Each cross phase process page in Microsoft Dynamics Sure Step describes the process, briefly describes the cross phase activity, and indicates the phase in which the activity occurs. Each cross phase process node contains pages for each implementation type, which include a Microsoft® Office Visio® 2007 diagram that illustrates the process and that includes links to each corresponding activity or task page.

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For example, the figure shows the diagram for the Program Management, Standard cross phase process.

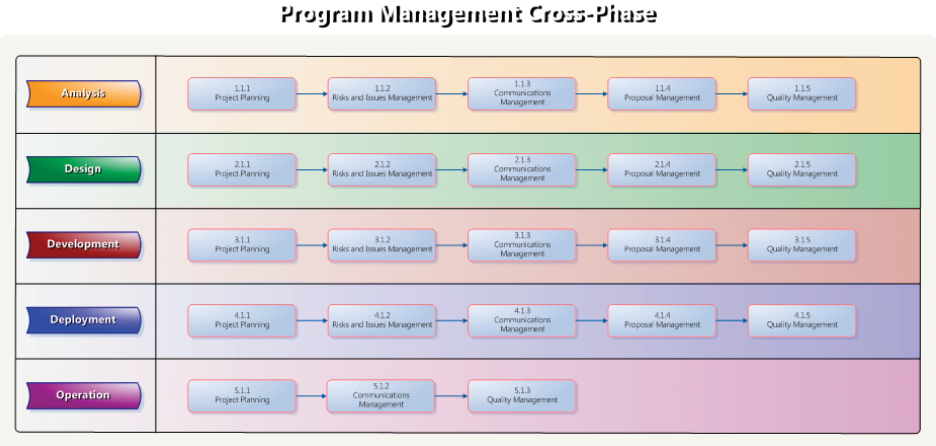

FIGURE 3.2 PROGRAM MANAGEMENT CROSS PHASE PROCESS

***NOTE**: Not all activities are shown in the cross phase Visio 2007 diagrams; only those activities that relate to the specific cross phase process are included.*

Project Management Deliverables

In addition to the technical and functional deliverables created during the project, Microsoft Dynamics Sure Step also specifies several project management deliverables that will help manage implementation projects. Using these deliverables will help to document decisions, outcomes, and schedules. They will also help to set expectations and communicate with project team members and the customer.

Like the functional and technical deliverables, the project management deliverables are associated with milestones that correspond to phases within the methodology.

The following table identifies the key project management deliverables that are created during specific phases in Microsoft Dynamics Sure Step.

Phase	Project management deliverable
Diagnostic	• High-Level Project Charter • High-Level Project Plan • Statement of Work • Budgetary Estimate Proposal • Decision Accelerator Deliverables, including Customer Reports (Optional)

Phase	Project management deliverable
Analysis	• Project Charter • Project Plan • Organizational Change Management Strategy • Risk and Issues Register • Change Control Plan • Communications Strategy and Plan • User Strategy and Plan • Future State Business Process Workflows • Functional Requirements Document (FRD) • Fit Gap Analysis Spreadsheet • Development Standards • Quality and Testing Standards • Infrastructure Scope Document • Infrastructure Design Document • Integration and Interface Requirements • Data Migration Requirements
Design	• Core Team Training • Functional Design Documents (FDD) for Fits (Configurations) • Functional Design Documents for Gaps (Customizations) • FDDs for Requirements indentified as Gaps in Standard Solution • FDDs for Integration and Interface Requirements • FDDs for Data Migration Requirements • Technical Design Documents (TDD) • Process Test Scenarios • Non-Production Environment Specification

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Phase	Project management deliverable
Development	• Training Guides/Documentation • Final Process Models • Final System Configuration • Final Custom Code Development • Data Acceptance, Process and Integration Testing complete • Performance Test and User Acceptance Test Scripts • Production Environment Specification • Final Integration and Interface Code Development • Final Data Migration Code Development
Deployment	• Deployment Plan • Train-the-Trainer (TTT) Training • End User Training • User Acceptance Test Results • Final Data Migration • Production Environment Readiness • Production Operations Guide • Cutover to Production
Operations	• Project Closure Report • Project Deliverables

Project Management Tools and Templates

Similar to the tools and templates that support the technical and functional activities, Microsoft Dynamics Sure Step provides project management-specific tools and templates. This includes templates for the primary project management deliverables and tools to manage implementation projects.

Categorizing tools and templates by the specific project management discipline they are being used in is an effective way to identify these resources. In addition, considering them in the context of project management processes will help to determine when to use a specific tool or template.

The following table lists project management tools and templates organized by the discipline they can be used in and when to use them in the project management process.

	Project initiation and planning	**Project execution and monitoring**	**Project closing**
Risk management	• Risk Identification Checklist • Risk Register	• Risk Identification Checklist • Risk Register	• None
Scope management	• Project Scope Statement (PSS) • Sign-off Form • Change Request Form • Change Request Log • Work Breakdown Structure (WBS)	• PSS • Sign-off Form • Change Request Form • Change Request Log • WBS	• PSS • Sign-off Form
Issue management	• Issue List • Issue Entry Form • Issue Work Form	• Issue List • Issue Entry Form • Issue Work Form	• None
Time and cost management	• Project Plan	• Project Plan	• Project Plan
Resource management	• Resource Organization • Project Resource Structure • Roles and Responsibilities • Role Descriptions	• Resource Organization • Project Resource Structure • Roles and Responsibilities • Role Descriptions	• Resource Organization • Project Resource Structure

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	Project initiation and planning	Project execution and monitoring	Project closing
Communication management	• Project Communication Plan • Project Charter • Project Kick-off Presentation • Project Status Report • Consultant Status Report	• Project Communication Plan • Project Charter • Project Status Report • Consultant Status Report	• Project Communication Plan • Project Charter • Project Status Report
Quality management	• Training Plan • Test Plan	• Training Plan • Test Plan • Go-live Checklist	• None
Procurement management	• None	• Sign-off Form (for acceptance of subcontracted work)	• None
Sales management	• Proposal • Statement of Work (SOW)	• Sign-off Form	• SOW • Sign-off Form

Locating Project Management Tools and Templates

The primary locations for links to project management related tools and templates in Microsoft Dynamics Sure Step are:

- In the **Project Initiation and Planning, Project Execution and Monitoring, and Project Closing** sections under the **Processes** node, in the **Project Management Library**.
- In the **Scope Management** discipline under the **Project Management Library, Disciplines** nodes.
- In the **Tools and Templates** box on activity and task pages for the project management discipline in which a specific tool or template is used.

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Organizational Change Management Disciplines

The purpose of Organizational Change Management discipline is to provide a blueprint of the change management approach for the project. The activities support the transformation required to achieve the benefits, vision, and strategy in the customer's business case.

Organizational Change Management is comprised of five activities:

- **Define Organizational Change Management Strategy**: Involves several key components that communicate the objectives and activities to ensure a successful adoption of the solutions.
- **Align and Mobilize Leadership**: Defines an action plan for the business executives and sponsors to ensure the action plan is enacted upon in accordance with the overall change management plan.
- **Engage Stakeholders**: Ensures that the project stakeholders are identified and are proactively engaged throughout the lifecycle of the project.
- **Align Organization**: Ensures that the project stakeholders are identified and are proactively engaged throughout the lifecycle of the project.
- **Enable Organization**: Ensures that the new solution is deployed, users are trained, and the support processes are operational.

Each activity involves several key change components that express the strategy, vision, objectives and activities to assist in a successful adoption of the solution.

Using the Project Repository

The Project Repository is a folder structure that is used to organize and store all documents related to an implementation project. A location can be specified for the Project Repository on the Preferences tab in Microsoft Dynamics Sure Step.

To make project documentation available to the project team, locate the Project Repository on a shared folder, a personal Web page, or a Windows SharePoint Services site. To control versions and store history for critical project documents, also, use SharePoint or other version control applications.

To simplify the distribution of documents for the project, compress and save the project by using the **Zip and Save** option on the **Projects** tab.

Best Practices for Managing Implementation Projects

Consider the following best practices for using Microsoft Dynamics Sure Step to manage implementation processes:

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- **Use the following approach as an overall strategy for using Microsoft Dynamics Sure Step to manage implementation projects:**
  - Use the project management tasks embedded in each activity to determine *when* to perform a specific project management task in each phase.
  - Use the project management disciplines to determine *how* to perform a project management task.
  - Use the project management processes to determine which project management tasks to perform at the *start*, *middle*, and *end* of an implementation project.

- **Determine the "must-have" deliverables for a specific project, and then identify "nice-to-have" deliverables.**
  Microsoft Dynamics Sure Step provides many technical and project deliverables. For a specific implementation project, identify the deliverables that must be created to meet the customer's requirements.
- **Use the project management processes as a high-level checklist of the project management activities performed throughout the duration of an implementation project.**
- **Design the internal project accounting system with accounts for time and costs that align with the phases and project management disciplines in Microsoft Dynamics Sure Step.**
  Also, when preparing a detailed statement of work, the estimates can be aligned with the phases in the methodology. Both of these strategies result in the following benefits:
  - A consistent means of reporting project results to the client from project start to closing is created. For example, the statement of work/budgetary estimate proposal estimates map directly to the accounting of actual costs reported to the customer on invoices generated from the project accounting system.
  - Periodic project budget reviews can be organized by these cost accounts so that they also map back to the statement of work/budgetary estimate proposal.
  - The data gathered in the internal project accounting system can help to analyze past projects and plan for future projects based on how much time and cost is associated with performing tasks previously from Microsoft Dynamics Sure Step.
  - Project data will also be valuable to help determine how much time is spent on performing implementation tasks, and by whom. This can help in making recruiting and hiring decisions.

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- **Facilitate collaboration between consulting and customer team members by copying the Project Repository structure to a Windows SharePoint Services site.**
  All team members can use SharePoint or another version control application to control versions and store version history for critical project documents. This helps ensure that everyone is always working with the most current information available.

Summary

Microsoft Dynamics Sure Step includes an extensive set of project management features to help manage implementation projects and avoid common project problems. These include the following:

- Project management tasks are embedded into each phase of the methodology to know when to perform a task.
- Project management disciplines provide detailed guidance on how to perform project management tasks.
- Guidance helps to perform management tasks during project initiation and planning, project execution and monitoring, and project closing.
- Cross phase processes provide cross phase views to help better manage important implementation tasks.
- Project management deliverables and a diagram that aligns these deliverables with implementation phases.
- Tools and templates to help build project management deliverables.

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Test Your Knowledge

Test your knowledge with the following questions.

1. Each phase in Microsoft Dynamics Sure Step begins with what activity?

   ( ) Analysis

   ( ) Planning

   ( ) Testing

   ( ) Training

2. Match each project management feature from Microsoft Dynamics Sure Step with its definition.

_____ 1. Project Management Processes	a. Each consists of tasks in a specific project management knowledge area.
_____ 2. Project Management Disciplines	b. Capture or summarize the results of project management tasks performed in each phase.
_____ 3. Cross Phase Processes	c. Three groups of related tasks that correspond to different points in the implementation life cycle.
_____ 4. Project Management Deliverables	d. Typically performed at several points within each phase in the methodology.
_____ 5. Project Management Tasks	e. A folder structure used to organize and store documents related to an implementation project.
_____ 6. Project Repository	f. Consists of related activities and tasks performed in different phases in the methodology.

3. Which of the following are common problems in Microsoft Dynamics implementation projects? Select all that apply.

   ( ) Clearly defining scope

   ( ) Overselling during the Sales process, which sets unrealistic expectations for the implementation project

   ( ) Inadequate risk management

   ( ) Failing to define a protocol for escalating project issues and managing project change

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Lab 3.1 - Managing Implementation Projects with the Project Repository

In this lab, you will complete the following tasks:

- Create a shared folder as a network location to share the project repository content.
- Specify the location of the Project Repository.

Scenario

Previously, you were introduced to the implementation project at Fabrikam, Inc. As the project manager for Contoso, you were asked to determine the state of the project and develop a plan of action that will succeed in meeting Fabrikam's goals. You determined the following:

- The best project type for Fabrikam is a Rapid implementation.
- The activities in the Diagnostic Phase are mostly completed.
- A fixed fee contract is most appropriate for this project.

As project manager, ensure that your consulting team members have access to all the implementation documentation that will be generated during the Fabrikam implementation project. You will use the Microsoft Dynamics Sure Step Project Repository to create a folder structure to store and communicate this information for the Fabrikam project team.

Challenge Yourself!

Complete the following exercises to test your understanding of the information in this chapter:

1. Locate the Project Repository designated within Microsoft Dynamics Sure Step.
2. Compress and save a project.

Need a Little Help?

1. Locate the Project Repository location on the Preferences tab.
2. The functionality to compress a project is on the Projects tab.

Step by Step

Use the following step procedure to locate the Project Repository folder and compress a project file:

1. In Microsoft Dynamics Sure Step, click the **Preferences** tab.
2. On the **Preferences** tab, in the **Project Repository** box, note the location.

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3. In Microsoft Dynamics Sure Step, click the **Projects** tab.
4. On the **Preferences** tab, select a project.
5. Once the project is selected, click **Zip and Save**.
6. Select the location where the file is to be saved and name the file.
7. Click **Save**.
8. Click **OK** on the Success message.

Lab 3.2 - Managing Risk and Scope in Implementation Projects

In this lab, you will complete the following tasks:

- Identify the tools and templates that will help you manage project risk and project scope.
- Determine the risks to the Fabrikam project.
- Identify the key components of a project scope document and describe how they apply specifically to the Fabrikam project.

Scenario

During later conversations with Fabrikam, the following is determined:

- The CEO of Fabrikam, Wilson Pais, is in conversations with a venture capital firm that is interested in buying the operation. Mr. Pais indicated that he needed to make "significant progress" in addressing the systems issues in the next 90 days if the deal is to be successful. He repeated that this project is a "basic, bare bones" implementation of the accounting software components.
- Phyllis Harris, the Controller, recently attended a conference and viewed various demonstrations of portal software that will push Enterprise Resource Planning (ERP) data out to the executive team. She is looking forward to the implementation of Microsoft Dynamics so that she can reduce her workload. She assumes that these ERP tools will be included in the initial implementation.
- Flemming Pedersen, the Accounting Manager, has been vocal about the prior partner's failure and has restated his assertion that upgrading FastBooks, instead of replacing it, is the most cost-effective approach.

In this lab, you will use some project management components of Microsoft Dynamics Sure Step to gain control of the project and move toward a successful implementation. You will focus on two key project management disciplines: risk management and scope management.

Exercise 1: Challenge Yourself!

Complete the following exercises to manage risk and scope in the Fabrikam implementation project.

Step 1: Identify Tools and Templates to Manage Risk.

1. In Microsoft Dynamics Sure Step, locate the **Risk Management** discipline under the **Project Management** node.
2. Review the content on risk management.

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3. Are all the risks associated with this project considered "negative risks?" Is there any way to introduce a "positive risk" to help ensure the success of the project?

_____

_____

_____

_____

4. What template is available in Microsoft Dynamics Sure Step to help manage risk?

_____

_____

_____

Exercise 2: Challenge Yourself!

Step 2: Determine the Risks to the Project.

1. Complete a risk register for this project. Save the risk register file to the desktop or to the Lab Files folder.

   Complete the following sections:
   - Risk category
   - Risk description and consequence
   - Phase when risk typically occurs
   - Risk response plan
   - Risk contingency plan

2. What are the key risks to this project?

Exercise 3: Challenge Yourself!

Step 3: Identify the Tools and Templates to Manage Project Scope.

1. Review Microsoft Dynamics Sure Step content on scope management.
2. What templates are available in Microsoft Dynamics Sure Step to help manage project scope? For this project, how can you specifically use each of these templates?

Exercise 4: Challenge Yourself!

Step 4: Identify the Key Components of a Project Scope Statement.

1. Open or save a copy of the project scope statement.
2. Briefly review the components of the project scope statement.

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3. What are the key components of the project scope statement that specially apply to the Fabrikam implementation project? Why are these important for this project?

_____

_____

_____

_____

_____

_____

Exercise 1: Step by Step

Complete the following exercises to manage risk and scope in the Fabrikam implementation project.

Step 1: Identify the Tools and Templates to Manage Risk.

1. In Microsoft Dynamics Sure Step, locate the **Risk Management** discipline under the **Project Management Library, Disciplines** nodes.
2. Review the content on risk management.
3. Are all the risks associated with this project considered "negative risks?" Is there any way to introduce a "positive risk" to help ensure the success of the project?

All the risks associated with this project are negative risks.
A positive risk can be introduced by making a partial refund or credit for Fabrikam if there is a budget surplus at the end of the project.

4. What template is available in Microsoft Dynamics Sure Step to help manage risk?

The Risk Register template is available in Microsoft Dynamics Sure Step to help manage risk.

Exercise 2: Step by Step

Step 2: Determine the Risks to the Project.

1. Complete a risk register for this project. Save the risk register file to the desktop or to the Lab Files folder.

   Complete the following sections:
   - Risk category
   - Risk description and consequence
   - Phase when risk typically occurs
   - Risk response plan
   - Risk contingency plan

2. What are the key risks to this project?

The key risks to this project are:
The lack of a detailed project scope statement
Unclear customer expectations
Short timeframe
Unaligned stakeholder expectations
Key personnel can resist change or are overcommitted to devote time to the project

Exercise 3: Step by Step

Step 3: Identify the Tools and Templates to Manage Project Scope.

1. Review the Microsoft Dynamics Sure Step content on scope management.
   a. In Microsoft Dynamics Sure Step, locate the **Scope Management** discipline under the **Project Management Library, Disciplines** nodes. Review the content on scope management.
   b. Review the components of the Project Scope Statement template.
   c. Answer the questions that follow.

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2. What templates are available in Microsoft Dynamics Sure Step to help manage project scope? For this project, how can you specifically use each of these templates?

The key templates for this project are:
Project Scope Statement
Work Breakdown Structure
Scope Change Request Log
Sign-off Form

Exercise 4: Step by Step

Step 4: Identify the Key Components of a Project Scope Statement.

1. Open a copy of the project scope statement.
2. Briefly review the components of the project scope statement.
3. What are the key components of the project scope statement that specially apply to the Fabrikam implementation project? Why are these important for this project?

The key components for this project are:
Project Definition and Objectives
Project Approach
Project Scope
Key Deliverables
Constraints
Success Criteria

Lab Discussion

Scenario

During this classroom discussion, discuss and compare your answers to the lab questions.

- What are the key risks to this project?
- Are all the risks associated with this project "negative risks?" Is there any way to introduce a "positive risk?"
- How can you use the project scope templates for the Fabrikam project?
- What are the key components of the project scope statement that specially apply to the Fabrikam implementation project? Why are these important for this project?

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Quick Interaction: Lessons Learned

Take a moment and write down three key points you have learned from this chapter

1.

2.

3.

Solutions

Test Your Knowledge

1. Each phase in Microsoft Dynamics Sure Step begins with what activity?

   ( ) Analysis

   (•) Planning

   ( ) Testing

   ( ) Training

2. Match each project management feature from Microsoft Dynamics Sure Step with its definition.

__c__ 1. Project Management Processes	a. Each consists of tasks in a specific project management knowledge area.
__a__ 2. Project Management Disciplines	b. Capture or summarize the results of project management tasks performed in each phase.
__f__ 3. Cross Phase Processes	c. Three groups of related tasks that correspond to different points in the implementation life cycle.
__b__ 4. Project Management Deliverables	d. Typically performed at several points within each phase in the methodology.
__d__ 5. Project Management Tasks	e. A folder structure used to organize and store documents related to an implementation project.
__e__ 6. Project Repository	f. Consists of related activities and tasks performed in different phases in the methodology.

3. Which of the following are common problems in Microsoft Dynamics implementation projects? Select all that apply.

   ( ) Clearly defining scope

   (√) Overselling during the Sales process, which sets unrealistic expectations for the implementation project

   (√) Inadequate risk management

   (√) Failing to define a protocol for escalating project issues and managing project change

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