



Andrea Polini

Software Project Management  
MSc in Computer Science  
University of Camerino

# Step 1: Identify project scope and objectives

- 1 Identify objectives (what the project must achieve) and practical measures of the effectiveness in meeting those objectives
- 2 Establish a **project authority** – **Project Management Board (PMB)**, has the responsibility for setting, monitoring and modifying decisions?
- 3 **Stakeholder analysis** - identify all stakeholders in the project and their interests
  - Internal to the project team
  - Internal to the organization
  - External to the organization (i.e. customers)
- 4 Modify objectives in the light of stakeholder analysis
- 5 Establish methods of communication with all parties

## Step 2: Identify project infrastructure

- 1 Identify relationship between the project and strategic planning
- 2 Identify installation standards and procedures
  - change control and configuration management
  - quality standards and procedures
  - measurement programme
  - ...
- 3 Identify project team organization

# Organizational Context

- Projects and project management take place in an environment that is **broader than that of the project itself**
- Understanding this broader context helps ensure that work is carried out **in alignment with the organization's goals and managed in accordance with the organization's established practices**

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Project managers need to **identify and describe** organizational characteristics, factors, and assets within an enterprise, that are **likely to influence the project**.

# Organizations

## Organizations and Projects

Organizations are systematic arrangements of entities (persons and/or departments) aimed at accomplishing a purpose, which may involve undertaking projects. An **organization's culture and style** affect how it conducts projects. Cultures and styles are **group phenomena known as cultural norms**, which develop over time. The norms include established approaches to initiating and planning projects, the means considered acceptable for getting the work done, and **recognized authorities who make or influence decisions**.

# Common experiences

Organizational culture is shaped by common experiences:

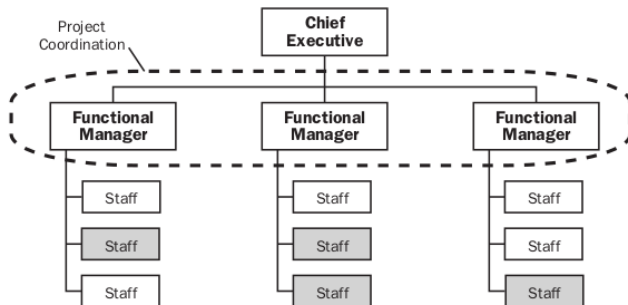
- Shared visions, mission, values, beliefs, and expectations
- Regulations, policies, methods, and procedures
- Motivation and reward systems
- Risk tolerance
- View of leadership, hierarchy, and authority relationships
- Code of conduct, work ethic, and work hours
- Operating environments

# Organizational structures

Organizational structure is an **enterprise environmental factor**, which can **affect the availability of resources** and influence how projects are conducted. Major types of organizational structures go from **Functional** to **Projectized** structure and a **mix of the twos**

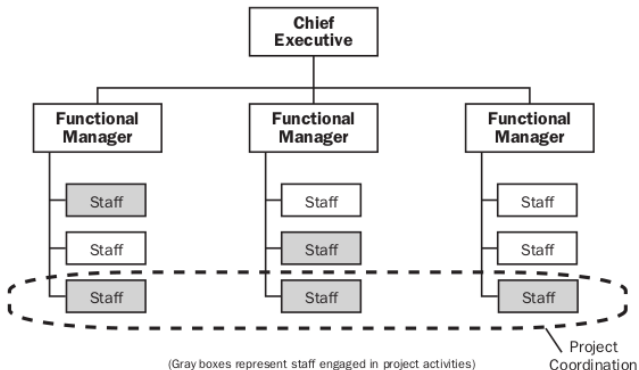


# Functional Organization



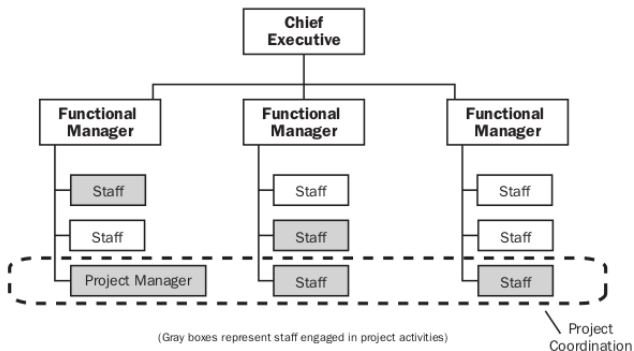
# Matrix Organization 1/3 – Weak matrix

Matrix organizations reflect a blend of functional and projectized characteristics:

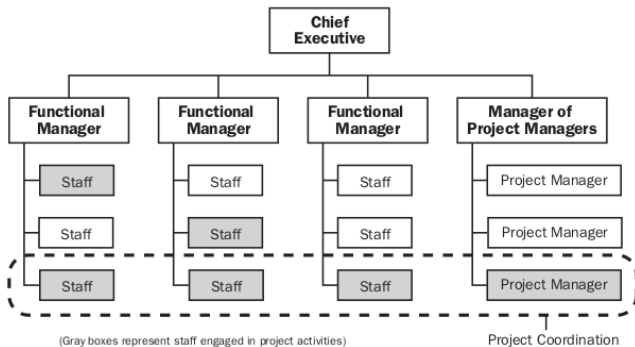


- **Project expeditor** works as staff assistant and communications coordinator. The expeditor cannot personally make or enforce decisions
- **Project coordinators** have power to make some decisions, have some authority, and report to a higher-level manager

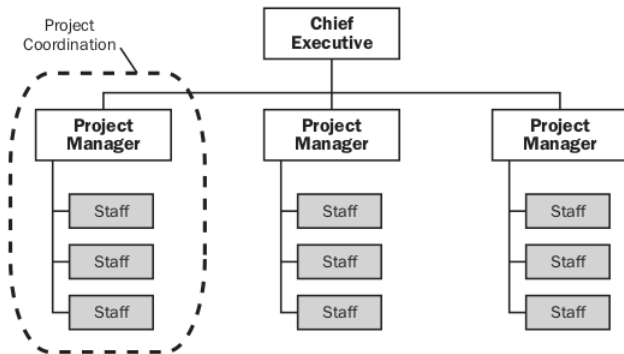
## Matrix Organization 2/3 – Balanced matrix



# Matrix Organization 3/3 – Strong matrix



# Projectized



(Gray boxes represent staff engaged in project activities)

# Organization and project characteristics

<b>Organization Structure</b> <b>Project Characteristics</b>	<b>Functional</b>	<b>Matrix</b>			<b>Projectized</b>
		<b>Weak Matrix</b>	<b>Balanced Matrix</b>	<b>Strong Matrix</b>	
Project Manager's Authority	Little or None	Low	Low to Moderate	Moderate to High	High to Almost Total
Resource Availability	Little or None	Low	Low to Moderate	Moderate to High	High to Almost Total
Who manages the project budget	Functional Manager	Functional Manager	Mixed	Project Manager	Project Manager
Project Manager's Role	Part-time	Part-time	Full-time	Full-time	Full-time
Project Management Administrative Staff	Part-time	Part-time	Part-time	Full-time	Full-time

# PM and communications

Many organizational structures include strategic, middle management, and operational levels. The project manager may interact with all three levels depending on factors such as:

- Strategic importance of the project
- Capacity of stakeholders to exert influence on the project
- Degree of project management maturity
- Project management systems
- Organizational communications

This interaction determines project characteristics such as:

- Project manager's level of authority
- Resource availability and management
- Entity controlling the project budget
- Project manager's role
- Project team composition

# Stakeholders

## Definition

A stakeholder is an **individual, group, or organization** who may affect, be affected by, or perceive itself to be affected by a **decision, activity, or outcome of a project**. Stakeholders may be actively involved in the project or have interests that may be positively or negatively affected by the performance or completion of the project. Different stakeholders may have **competing expectations** that might create conflicts within the project. Stakeholders may also **exert influence over the project, its deliverables, and the project team** in order to achieve a set of outcomes that satisfy strategic business objectives or other needs.



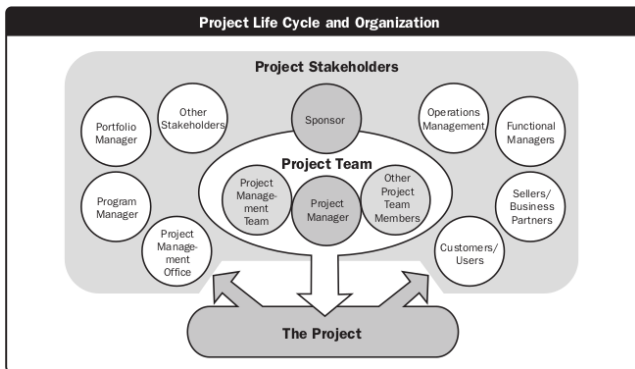
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Stakeholders include **all members of the project team** as well as all **interested entities that are internal or external to the organization**. The project team identifies internal and external, positive and negative, and performing and advising stakeholders in order to determine the project requirements and the expectations of all parties involved. The **project manager should manage the influences of these various stakeholders** in relation to the project requirements to ensure a successful outcome.

# Stakeholders



Stakeholder identification is a **continuous process throughout the entire project life cycle**. **Identifying** stakeholders, **understanding** their relative degree of influence on a project, and **balancing** their demands, needs, and expectations are critical to the success of the project. Failure to do so can lead to delays, cost increases, unexpected issues, and other negative consequences including project cancellation.

# Stakeholder management process

- **Identify Stakeholders** – The process of identifying the people, groups, or organizations that could impact or be impacted by a decision, activity, or outcome of the project; and analyzing and documenting relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success.
- **Plan Stakeholder Management** – The process of developing appropriate management strategies to effectively engage stakeholders throughout the project life cycle, based on the analysis of their needs, interests, and potential impact on project success.
- **Manage Stakeholder Engagement** – The process of communicating and working with stakeholders to meet their needs/expectations, address issues as they occur, and foster appropriate stakeholder engagement in project activities throughout the project life cycle.
- **Control Stakeholder Engagement** – The process of monitoring overall project stakeholder relationships and adjusting strategies and plans for engaging stakeholders.

# Identify Stakeholders

How to get a stakeholder list:

- Interviews
- Brainstorming
- Expert judgement

# Classification models for stakeholders

List of stakeholders have to analysed to better manage them. There are multiple classification models used for stakeholders analysis, such as:

- **Power/interest grid**, grouping the stakeholders based on their level of authority (“power”) and their level or concern (“interest”) regarding the project outcomes
- **Power/influence grid**, grouping the stakeholders based on their level of authority (“power”) and their active involvement (“influence”) in the project
- **Influence/impact grid**, grouping the stakeholders based on their active involvement (“influence”) in the project and their ability to effect changes to the project’s planning or execution (“impact”)
- **Salience model**, describing classes of stakeholders based on their power (ability to impose their will), urgency (need for immediate attention), and legitimacy (their involvement is appropriate).

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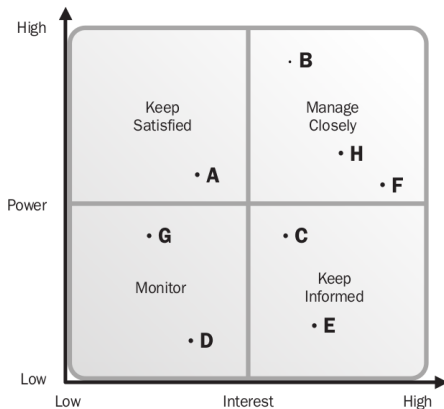
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# Stakeholder analysis quadrant



# Stakeholder engagement analysis

The current engagement level of all stakeholders needs to be compared to the planned engagement levels required for successful project completion. **Stakeholder engagement throughout the life cycle of the project is critical to project success.** The engagement level of the stakeholders can be classified as follows:

- **Unaware** – Unaware of project and potential impacts.
- **Resistant** – Aware of project and potential impacts and resistant to change
- **Neutral** – Aware of project yet neither supportive nor resistant.
- **Supportive** – Aware of project and potential impacts and supportive to change.
- **Leading** – Aware of project and potential impacts and actively engaged in ensuring the project is a success

# Project stakeholder management – results

In addition to the data gathered in the stakeholder register, the stakeholder management plan often provides:

- **Desired and current engagement levels of key stakeholders**
- Scope and impact of change to stakeholders
- Identified interrelationships and potential overlap between stakeholders
- Stakeholder communication requirements for the current project phase
- Information to be distributed to stakeholders, including language, format, content, and level of detail
- Reason for the distribution of that information and the expected impact to stakeholder engagement
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- **Project success and deliverable acceptance criteria**
- Process to identify, escalate, and resolve issues that arise during the project
- Relationship among the project team, organizational groups, and external stakeholders
- Project organization chart that identifies project roles
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