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**Name of the survey:** Resource management assessment of DWH 2020 project

**Type of the survey:** Project Resource Management

**Evaluation type:** Premium

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# 1. Management Summary

This Premium level Management Summary contains the high-level evaluation information. It starts with the statistical summary of the answers, including the distribution of the answers and the average of the grades. You will also find the list of Priority 1 actions, that reflects the view of upify IT Ltd., based on our expertise. We recommend reviewing the detailed list, and re-prioritize whenever necessary. In this section, we also give the list of proposed tools that you can download from the https://upifyit.com/ site on the evaluation page of the survey.

The second chapter leads you through the Detailed Evaluation. First, in sub-chapter 2.1 we present the summary table of all questions and answers. The sub-chapter 2.2 describes all questions, answers, the consequences of the answers and also the recommendation. Afterward, the sub-chapter 2.3 goes beyond the individual question and describes our findings and recommendations based on several rules that take into consideration the correspondences between the answers.

The third chapter summarizes the recommended Actions, including the reference and the priorities.

Finally, the fourth chapter includes the summary information of Tools that we propose to use.

**Answer statistics**

|  |  |  |
| --- | --- | --- |
| **Option** | **Choices** | **% of total** |
| 1. | 0 | 0% |
| 2. | 11 | 50% |
| 3. | 10 | 45% |
| 4. | 1 | 5% |
| 5. | 0 | 0% |
| NA | 0 | 0% |
| **Total** | **22** | **100%** |

***Legend***

*Option: The option that was selected during completing the survey*

*Choices: The number of cases when the given option was chosen*

*% of total: The percentage of cases when the given option was chosen*

**Average of the answer grades: 2.55**

**Priority 1 actions**

|  |  |
| --- | --- |
| **Action** | **Ref** |

***Legend***

*Action: Description of the recommended action*

*Ref: Reference to the chapter of this document that includes more details*

**Recommended tools**

• Change Log

• Business Case

• Cost Plan

• Resource Plan

• Time\_Sheet

# 2. Detailed Evaluation

This chapter contains the detailed evaluation of the survey. First, a summary table includes all questions, the selected options and the answer as displayed on the survey screen. In sub-chapter 2.2 we provide the detailed evaluation of individual answers together with the recommended actions. Finally, in sub-chapter 2.3 an additional analysis can be found, that considers the relationships between the answers.

## 2.1. Summary table of answers

The summary table below contains all questions and answers in order of displaying in the survey.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **No** | **Question** | **1** | **2** | **3** | **4** | **5** | **N** | **Answer** |
| 1 | Are Resource Management activities part of the Project Plan? |  |  |  |  |  |  | Some elements are part of the Project Plan |
| 2 | Are the assigned resources enough to complete the project? |  |  |  |  |  |  | It might be enough with high risk |
| 3 | Are there regular project reports on Resource Management? |  |  |  |  |  |  | There are reports time-to-time, structure and frequency are not defined |
| 4 | Is Resource Plan, Actual and Forecast regularly reviewed by the Sponsors / Management? |  |  |  |  |  |  | They review the resource status at least once in a quarter |
| 5 | Is the Resource Management process defined? |  |  |  |  |  |  | The process is defined that is usable for most of the activities |
| 6 | What is the estimated ratio of utilized resources that bypass the Resource Management process? |  |  |  |  |  |  | Between 10% and 25% |
| 7 | Is there a Resource Plan? |  |  |  |  |  |  | There is a Resource Plan including most resource requirements and assignments |
| 8 | Is the Resource Plan kept up to date? |  |  |  |  |  |  | It is updated with a pre-set frequency |
| 9 | Is there a plan to retain for future access and use the knowledge generated during the project? |  |  |  |  |  |  | There is a detailed plan to retain a smaller part of the knowledge |
| 10 | Are Timesheets collected, approved and reported? |  |  |  |  |  |  | Timesheets cover the smaller part of project activities and participants |
| 11 | What is the level of cooperation between the Project Manager and project members? |  |  |  |  |  |  | High |
| 12 | Is there sufficient PMO (Project/Program Management Office) support including tools and processes? |  |  |  |  |  |  | There is limited PMO support |
| 13 | Do the project members receive regular feedback on their performance? |  |  |  |  |  |  | A few of them receives feedback |
| 14 | Is the resource utilization efficient? |  |  |  |  |  |  | The resource utilization efficiency is medium |
| 15 | What is the level of team spirit in the project? |  |  |  |  |  |  | Low |
| 16 | Do the people, assigned to the project, meet the knowledge, experience, and soft skills requirements? |  |  |  |  |  |  | Majority of them meets the requirements |
| 17 | Is resource assignment planned in time to enable on-boarding? |  |  |  |  |  |  | It is planned in time for the majority of the resources |
| 18 | What is the commitment level of the Steering Committee members to support the project with resources? |  |  |  |  |  |  | Medium |
| 19 | What is the level of commitment of team members to reach the project goal? |  |  |  |  |  |  | Medium |
| 20 | Are the assignments to the project confirmed by the line managers in the form of written assignments letter? |  |  |  |  |  |  | There are a few assignment letters |
| 21 | If vendor contribution is needed, is the contract preparation, negotiation, approval and on-boarding time included in the Project Plan? |  |  |  |  |  |  | A smaller portion of activities is included |
| 22 | What is your overall evaluation of Resource Management activities in the project? |  |  |  |  |  |  | Medium |

***Legend***

*No: Sequence number of the question*

*Question: Text of question as displayed on the survey screen*

*1: Colored red if Option 1 was chosen*

*2: Colored orange if Option 2 was chosen*

*3: Colored yellow if Option 3 was chosen*

*4: Colored light-green if Option 4 was chosen*

*5: Colored dark-green if Option 5 was chosen*

*NA: Colored grey if NA was chosen*

*Answer: Text of the chosen answer as displayed on the survey screen*

## 2.2. Evaluation of individual answers

In this sub-chapter we give the detailed evaluation of all answered questions. Each question has its sub-section. The Description outlines the overview of the question in general, including options and best practices when applicable. The next information is Your answer that was given. The Consequence describes what the consequences of that specific answers are. The lower the answer grade is, the more severe the consequences are. Finally, we give our Recommendation what to do. Please adjust this action point to your specific needs, priorities, and environment whenever necessary.

### 2.2.1. Are Resource Management activities part of the Project Plan?

**Description**

Projects are temporary, cross-functional organizations using resources from different organizations, in many cases from different companies. This organizational challenge further increased with the volatile workload: in many cases, the resources are necessary only for some part of the project, furthermore in less than 100% utilization for that period. If a critical resource is not available for a few days, it may happen that large teams cannot function with full efficiency, just because they have to wait for an input from the critical resource. Resource Planning is one of the vital processes in the project. Resource Planning starts with estimating the necessary resources of the project tasks. Professional knowledge, seniority, experience within the organization, good track record with similar projects should be considered. The next step is to decide where to acquire the resources. If there are not sufficient internal capacity, externals need to be involved. In both cases, the mobilization time should be planned. Internals are probably busy with other activities as well, thus planning is necessary in advance. Many organizations run a bidding procedure to select the external partners, and the whole procurement process takes time. Afterward, vendors might also need time to mobilize their resources. When all internal and external resources are available, the project has to organize them in teams. Team leader to be nominated, work to be started and managed according to the Roles and Responsibilities document of the project. Resource consumption should also be measured, monitored, plan-actual deviation analyzed, forecasts created, in case of problems preventive and corrective actions initiated and performed. All these Resource Management activities have to be part of the Project Plan. There are on-time and repetitive actions; all need to be part of the Project Schedule.

**Your answer**

2 - Some elements are part of the Project Plan

**Consequence**

It is a good starting point that at least some Resource Management activities are part of the Project Plan. At the same time, it is far from sufficient since essential elements might be missing.

**Recommendation**

Review the project Resource Management (plan, mobilize, lead, measure, motivate) tasks immediately and insert the missing activities in the Project Plan.

### 2.2.2. Are the assigned resources enough to complete the project?

**Description**

The proper Project Plan includes the Resource Plan. For each task, the list of the allocated resource list is necessary. Resources can be Human (internal and external people), Equipment (computers) and others (real estate for project office, data center, package software). Sometimes it is easier to estimate the necessary resources. As an example, most of the user acceptance tasks are repetitive, measurable, standard activities; therefore their resource requirement can be quickly determined, assuming the availability of test systems and test data. In other cases, the estimation is far from evident like in case of requirement specification, since the project cannot see the volume of the work before the actual requirement list is collected and analyzed. Well defined scope and experience of participants will support the estimation in these cases too. The project should start with a hypothetical Resource Plan (what is needed). Afterward, the practical Resource Plan is necessary that already considers the availability of the resources. For Human resources in the best case, it means names (e.g., the name of the project member business analyst), or at least jobs and organizations (e.g., a business analyst in Channel management department) to identify if they will be available when necessary.

**Your answer**

2 - It might be enough with high risk

**Consequence**

Some of the resources are not available immediately ad hoc when needed. It takes time to request, negotiate with the resource owner, agree on the schedule and finalize the assignment. If the risk of not sufficient resources is high, a crisis will very likely occur, that resources would be needed but not available. It may cause delays and budget overrun.

**Recommendation**

Assess the risk of not sufficient project resources and possible consequences. Put higher emphasis and priority on resources that are not easy to assign, and the lack of availability would have more severe consequences. Discuss it with the Steering Committee. Assign additional resources according to the criticality of the project and the risk appetite of the organization.

### 2.2.3. Are there regular project reports on Resource Management?

**Description**

Effective and efficient allocation, utilization and motivation of the resources are key success criteria in the projects. To reach the project goal, strict resource management is necessary. The Resource Management process describes the activities required. Regular reports on resources are part of this process. Even if there is no formal process description (there should be), the measurement and regular reporting are vital. The resource management report should contain the plan, actuals, and the forecast. The report should be as specific as possible, e.g., in the case of human resources, the names of the colleagues or partner employees have to be listed whenever useful. The Project Manager also describes the gaps, which result in either risk or already issues. If support or decision is needed, it should also be part of the report. Different audiences need different project cost reports. The resource owner organizational units or external partner should be all the details regarding their team so that they can assure full support. The sub-project leaders need the details of their team. On the management level, the Steering Committee needs only a high-level summary and more information just in case of problems and when their decision is necessary.

**Your answer**

2 - There are reports time-to-time, structure and frequency are not defined

**Consequence**

When the structure of the resource report is not defined, it is hard to compare the different statuses and analyze differences to understand the trends. The recipients will not be able to compare the reports to see changes, like the evolution of the forecast. Without pre-set frequency, the recipients will not build in their work schedule the processing of report and taking actions in case of need. To be able to compare, the forecast methodology should also be unified. Usually, the controlling unit of the organization sets standards and expectations.

**Recommendation**

Define the structure of the project Resource Plan, actual and forecast report. Ask feedback from the recipients of the current ad hoc report and use it when defining the document. Set frequency depending on the audience and the nature of the project. As a default, a weekly operative and a monthly executive-level report may be a good starting point. If necessary, also align with the controlling unit of the organization.

### 2.2.4. Is Resource Plan, Actual and Forecast regularly reviewed by the Sponsors / Management?

**Description**

The Sponsors/Management should regularly review the resource status. The review includes an overview of the original Resource Plan, the current actuals and the forecast for the future, until the end of the project. In case of any deviations, they have to understand the root cause, the drivers of the deviance, the possible mitigations and make a decision whenever it is necessary. During the review, the Sponsors/Management can make decisions to improve their support. As an example, if a critical resource is not available and it would cause a significant delay, the manager of that division should reprioritize the actual tasks of the colleague and assign to the project work. Even if the project goes well, without any difficulties, significant risks and changes, the Sponsors/Management should regularly review the resource status. It is part of their control tasks. In addition to that, it is also motivational since PM and team will understand that their project is crucial for the organization.

**Your answer**

3 - They review the resource status at least once in a quarter

**Consequence**

The quarterly review is not sufficient in most of the cases. Even in a relatively stable project, there are several changes and more than planned resource utilization, that have a severe impact on the forecast. When they review it so rarely, they miss the opportunity to fix the problems at the right time.

**Recommendation**

Explain to the Sponsors / Management why quarterly project resource review meetings are not sufficient. They have to devote time ideally at least every month. Resource review is usually part of the overall project review. The focus is on the availability of critical resources.

### 2.2.5. Is the Resource Management process defined?

**Description**

Project utilizes resources to reach project goals. Without the timely availability of skilled and motivated resources, the project will be delayed or failed. At the same time project should use resources efficiently to keep the project cost on the necessary level. Appropriate Resource Planning, measurement, tracking processes have to be in place. Resource Management process should be harmonized with, incorporated into the organization's overall Resource Management if any. Resource Management starts with the estimation of the resource requirements of all tasks. The project should plan the skill, seniority level and in many cases also personality traits for each task. Afterward, the Project Plans how to acquire resources, either internally or externally, in most of the projects a mixture of internals and externals work together. The next step is assuring the timely availability; the resource owners have to commit to the assignment of their team members. After planning, there are many tasks during the implementation as well. The project organizes teams, builds team processes and motivation, continuously monitors utilization. PM also manages unexpected events like an immediate need for additional resources, substitution of resources that are suddenly not available due to Holiday or other reasons. Due to the criticality of resource availability, it is a good practice to plan not only skills and capacities but also to include the names of team members in the plan. It makes commitments very specific and also supports to identify critical resources, e.g., specialized knowledge, understanding the environment.

**Your answer**

3 - The process is defined that is usable for most of the activities

**Consequence**

It is already a favorable situation that the project has defined the Resource Management process that covers most of the activities. However, it is not comprehensive, and as a consequence, and doesn't include some activities. In the worst case, the necessary key resources would be not available when needed, thus causing delay or other problems. The Sponsors/Management have a good overview of the Resource Plans and actuals, but due to lack of some information, they may miss the opportunity to fix issues in time. As an example, if the process doesn't cover the resolution of future resource shortages, the assignment by the resource owners may be too late.

**Recommendation**

Improve the project Resource Management process so that it covers all involved activities. The goal is to assure the complete understanding and control of the project resources, especially the timely availability of all resources. One input of this improvement can be a workshop with stakeholder to identify what is missing today.

### 2.2.6. What is the estimated ratio of utilized resources that bypass the Resource Management process?

**Description**

The project should plan, mobilize, manage, motivate, measure and report utilization data of all resources, that are necessary and involved to implement the scope elements, according to the Resource Management process. Regular reviews might discover resources that bypass some or all steps in this process. The reason may be an insufficient process, lack of responsibilities, lack of skills, lack of quality checkpoints, lack of discipline, low morale. When some of the Resource Management activities bypass the written process, there may be severe consequences, depending on the criticality of the impacted resources, on potential corrective measures, the level of cooperation in the organization and other factors.

**Your answer**

3 - Between 10% and 25%

**Consequence**

The project management has no control over a relatively high proportion of the resources or manages outside of the formal process. As a consequence, the project may deviate from the plan, and there is a considerable risk of project delays due to the unavailability of critical resources. Lack of process conformity may also cause issues in related processes like Schedule Management and cost management.

**Recommendation**

Assess, why 10% to 25% of resources bypass the project Resource Management process. The reason may be an inadequate and overcomplicated process, lack of discipline in project work, insufficient education, missing project controls. Since the participants follow the process in most of the cases, a restructuring, training and improved control will probably improve the situation a lot.

### 2.2.7. Is there a Resource Plan?

**Description**

The projects must prepare a maintain the Resource Plan that includes all resources needs with their timing, and also the commitments from resource owners. The document should include at least the following information - the type of resource (e.g., System analyst, Disk storage, Office space) - in the case of human resources the subject matter expertise, qualifications, and soft skills - required capacity - timing - status of assignment from the resource owners - in the case of human resources, the names of the internal of external colleagues If the Resource Plan includes cost information (e.g., the daily fee of an external developer), it supports the cost calculation for the Cost Plan document. At any point in time, the PM should have an up to date Resource Plan.

**Your answer**

3 - There is a Resource Plan including most resource requirements and assignments

**Consequence**

The Resource Plan is in good shape since only a smaller portion of the resources may be missing. However, if a critical resource is missing, it may cause even project delay. Besides, the expenses of that resource would be missing from the Cost Plan as well.

**Recommendation**

Add the missign elements to the project Resource Plan, based on the detailed task list. When ready, cross-check with the current Resource and Cost Plans and adjust wherever needed. In the case of budget gaps, submit to the Steering Committee for approval.

### 2.2.8. Is the Resource Plan kept up to date?

**Description**

During the project, there are several cases when the required resources change. Tasks may need less or in most cases more resources than planned. A Change Request, or a risk mitigation task requires resources. New tasks may pop up that were not expected. In any case, the Resource Plan should be updated. The Resource Plan should include resource items in details, so it has to be modified even in case of smaller changes. The update process is even more critical in those cases when the resources are named. If a person needs more time to finish a task, or additional expert are assigned to implement a new Change Request, the Resource Plan update is necessary to include their occupation to task and periods. In addition to the event-based update, it is also good practice to review the Resource Plan with some frequency. This review aims to check completeness, timeliness, and quality of the entered data. Projects should also have other controls to ensure that Resource Plan is updated whenever necessary; examples are mandatory check-lists, project Quality Assurance.

**Your answer**

3 - It is updated with a pre-set frequency

**Consequence**

The several updates probably keep the Resource Plan mostly up to date - depending on the update frequency. It also indicates that there is a functioning process. At the same time, the Resource Plan is still not up to date all the time, and some resource requirement changes may not be reflected in the document. As an example, the need for a critical resource (e.g., enterprise architect) may be missing, thus causing issues.

**Recommendation**

Modify the Resource Management process to ensure that the Resource Plan is always up to date. Inform and educate the project team members, so that they continuously update the Resource Plan in case of relevant decisions like approved Change Requests or risk mitigation actions. The project should keep the Resource Plan always up to date according to related decisions.

### 2.2.9. Is there a plan to retain for future access and use the knowledge generated during the project?

**Description**

During the projects, new information and knowledge are generated. Organizations should take measures to preserve it in an accessible and understandable form. Many different technical and project documentation contain knowledge. Examples of project documentation are Scope, Project Plan, submissions and decisions, Change Log, Risk Log, Resource Plans, and actuals. Examples of technical documentation are requirement specification, system design, architecture plans, process description, infrastructure configuration. The projects should have a guideline, processes, and systems to ensure that the team stores the relevant documents so, that is easy to search and find. Organizations should also ensure that they will be able to utilize this information. The teams should be able to understand the big picture, what are the main components, what are the sensitive parts, where are the main risks of operation and maintenance, where are the obstacles when new developments and updates would be necessary. Without competent employees and partners, the documentation is useless. When the organization loses continuity in understanding the systems and processes, it is much harder and costlier to build that expertise again from scratch, based on the documentation. Projects, therefore, should have a plan for knowledge transfer. It is especially essential when external capacities are involved, and the vendors possess relevant information. The contracts should guarantee the documentation of the knowledge, and the hand-over to the client organization. The organization should identify and document for each domain, which organizational unit, team and even which colleague will take over the knowledge and deal with the solution in the future.

**Your answer**

2 - There is a detailed plan to retain a smaller part of the knowledge

**Consequence**

The risk is high that the organization will lose some of the critical knowledge. In a theoretical case, it is possible, that the project participants will maintain, support and operate the solution after the project phase. In practice, it doesn't happen. People move to new projects, and vendor contracts terminate, there are moves within the operational units. It may mitigate the risk if the current, deficient plan contains at least the most critical elements like system architecture, system design, and database structure description. The additional benefit of the knowledge transfer activities, that the participants, especially those who take over the documentation will validate if the documentation correct and complete is. Due to the lack of the knowledge transfer plan, this control will not work for the majority of project deliverables.

**Recommendation**

Complete the existing project knowledge transfer plan with the missing elements. Make sure that it includes in details the knowledge domain, the list of supporting documents, the future knowledge owner and the timing of knowledge transfer. Finalize the plan after the design phase and start the transfer gradually.

### 2.2.10. Are Timesheets collected, approved and reported?

**Description**

In many projects, the human labor constitutes the most significant portion of total project costs. Efficient utilization is essential to keep the spending within the budget. It is valid for all internal employees, and also for externals, especially when they work under Time Material conditions. The Project Manager should have a clear understanding of the utilization of the resources. The Timesheet should include a brief description of the activity and the time spent on them. Timesheets have many advantages: - it is the underlying document of the actual cost calculation of the corresponding project task. - the Project Manager can assess the resource utilization efficiency based on the Timesheet and can take improvement actions saving resource, money and time. - in external contractual relationships - especially in the case of Time and Material agreements but in some other constructions as well - Timesheet is the basis of the invoicing and payment and accounting. - supports to detect issues and serves as the basis of intervention: e.g., if PM realizes that reporting requires significant efforts, and the capacity for actual software development is not sufficient, there is an option to simplify the reporting and decrease the frequency. - Timesheet has a motivational power since project participants understand that their contribution and efficiency will be evaluated based on Timesheet as well; they will seek proactively for valuable activities and perform well The Project Manager should approve the Timesheets. In medium to large projects, the sub-project leader may and should also confirm them preliminarily. It ensures control over the budget and also the authority of the PM. As the Timesheets are the basis to understand the project resource utilization, the information should be specific, traceable but not necessarily very detailed. It can include references, as an example to project tasks, documents, workshops. It should be sufficient to judge if the completed work required that duration (efficient - do the things right) and if the work worth the resource consumption for the project (effective - do the right things). In some cases, Timesheet can be generated from supporting tools like test management, operations ticketing system, training scheduler. In other cases, it is not possible, and participants have to fill the Timesheet.

**Your answer**

2 - Timesheets cover the smaller part of project activities and participants

**Consequence**

Since the Timesheets cover only the minority of the project efforts, the Project Manager and the Steering Committee will have insufficient information on how much efforts were necessary. They cannot calculate most of the cost of activities for the actual cost report. If the time report is missing, it is not possible to control the vendors who work under Time Material conditions. The PM can hardly identify activities that require high effort, and the benefit is low. Besides, there is no proper underlying document for controlling and accounting.

**Recommendation**

Expand the Timesheet data registration, collection, analysis and reporting to the missing activities immediately in the project. Make sure, that it includes at least the name of the person, task identifier and hours spent. Improve the content and methods if needed.

### 2.2.11. What is the level of cooperation between the Project Manager and project members?

**Description**

It is the Project Manager's task to organize cooperation and communication within the project. It includes formal and informal components. Usual formal parts are workshops on different topics, reports to Project Manager, regular status meetings, daily stand-ups, news-letters to all project team members, all-project-staff briefings (e.g., bi-weekly overview, max 30 minutes), escalation meetings. The PM should carefully choose the level of their involvement, avoiding both losing control and micromanagement. When the cooperation and trust level is good, project members can give proposals to eliminate or reduce the frequency and duration of some events, limit the number of participants. Informal events and communication, briefings are also critical. People share much information in the canteen, coffee break or during an evening gathering or team building exercise. They also build trust that is a precondition of the cooperation. Just a few minutes informal discussion, a small chat in elevators give a great opportunity to PM to demonstrate that he means what he does formally (walk the talk), and also to get information on essential topics like hidden risk nobody want to raise formally or destructive conflict. The PM has to use formal and informal elements wisely. If the cooperation with the project team is weak, it can make the project fail, even if all other preconditions are met, like clear scope, management support, sufficient resources, and funding.

**Your answer**

4 - High

**Consequence**

The cooperation is sufficient in the project. It is likely that the goal and scope are clear, top management support is strong, the sponsors and the concerned departments cooperate well, there are minimal cultural differences, the participants possess exhaustive experiences, and the personalities also match well. While the current status is excellent now, it makes sense to seek further improvement. The project team might find additional ways to reach an even higher level.

**Recommendation**

Discuss within the project if there any further possibilities to improve the cooperation between the Project Manager and the project team. Don't overdo, but a one hour open and collaborative workshop may reveal additional options.

### 2.2.12. Is there sufficient PMO (Project/Program Management Office) support including tools and processes?

**Description**

Most organizations run tens or hundreds of projects each year. They develop guidelines, processes, and tools to ensure consistency, control, and efficiency. The projects should work according to the guidelines, processes and project control system. The PMO or other units have to ensure compliance. They play an internal quality assurance or audit role as well. The PMO members read documents, check if everything was correctly prepared and documented and all the supporting evidence stored and available. Besides, in many organizations, they also support the project, contribute and perform productive work. It is a good practice to have PMO members in projects to execute the project office tasks. They may educate the project members, organize training sessions and provide on-site support on how to use tools and follow processes appropriately. In mature organizations, the governance/controller and the supporter/contributor roles are mixed, also ensuring that regulations and tools match the real needs, and are efficient and pragmatic.

**Your answer**

2 - There is limited PMO support

**Consequence**

With limited PMO support, the project works mostly isolated from PMO, relying on written guidelines, policies, and procedures. It may be partially sufficient, especially if the documentation is appropriate and the participants already have experiences in this environment. However, if the PMO doesn't perform checks and validations, there may be project deficiencies, e.g., some of the mandatory documents may be not available in the required format. Even if the limited support includes some methodology support and quality checks, further improvement is necessary. Since there is some support, there is already a direct communication between the PMO and the project members.

**Recommendation**

PMO should improve project support immediately. Most important areas are the methodology support and the quality checks of the project work and deliverables. Agree on cooperation methods and schedule, and proceed accordingly.

### 2.2.13. Do the project members receive regular feedback on their performance?

**Description**

Performance or team members should be measured, evaluated and they need to receive feedback. It supports their improvement, clarifies potential misunderstanding and increases motivation. The approach and method vary widely across organizations. It may be done regularly in case of longer projects. It has the benefits of predictability and also ensures that nobody is forgotten. Feedback is also beneficial in case of significant positive or negative events like completing a task of suffering delays due to low quality work. The benefit of the prompt feedback after the event is that the positive assurance or the request to improvement can be effective without delay. Informal methods are also valuable. As an example, the Project Manager may have face to face coffee breaks or lunch with colleagues to give and also ask for feedback. Alternatively, the PM may stop by the desk of the project members, or ask for a few minutes of face-to-face talk after a meeting to give and ask for feedback.

**Your answer**

2 - A few of them receives feedback

**Consequence**

Since most the team members don't receive feedback, the majority of the project participants doesn't know if they work according to the expectations or not. The Project Manager misses the opportunity to explain what they are good at and what they should improve. There may be some fundamental misunderstandings, and they will be not clarified. Besides, the lack of feedback also decrease motivation and increases uncertainty and sometimes fear. Another negative consequence that the majority of the team members will feel unfair that they don't receive feedback while others do. It undermines trust and cooperation.

**Recommendation**

Establish the evaluation and feedback process that covers the entire project team. Inform all team members about the next steps. Afterward, follow the process and hold the feedback sessions with everyone, not only with a few selected colleagues. The Project Manager should also ask for feedback.

### 2.2.14. Is the resource utilization efficient?

**Description**

The Project Managers have to measure the resource utilization efficiency and take mitigation actions when needed. Efficiency is higher when more result is produced during the same period. As a first step, the projects measure the output. Each project members should report the activities regularly. I some cases the volume of work is measured via the supporting workflow management or ticketing tools. Test management systems record how the testers performed the test cases. Code repositories include information which code was delivered during certain periods. In other cases, the activity is less measurable, but the participants should report the performed work in these cases as well. A business analyst should report how much time was spent on workshops and document preparation. An architect should report for which activities she or he spent the time. The Project Managers and team leaders should analyze the collected data to determine if the resource utilization was efficient or not. To judge, they can use benchmark data, historical information from similar projects in the organization, result of the detailed assessment of standardized activities like testing, and expert opinion. Sometimes they have to involve subject matter experts like an experienced programmer. When there is an efficiency gap, project management should take improvement actions. Even a few percents of improvements may bring significant financial benefits.

**Your answer**

3 - The resource utilization efficiency is medium

**Consequence**

There is a remarkable efficiency enhancement potential in the project, at least in some areas. Several reasons may be behind the low efficiency, like poor work organization, insufficient training, lack of experience, organizational culture, low morale, lack of motivation. The efficiency improvement in selected areas would be beneficial not only for the organization via cost and time saving but for the team members as well. The would feel more attention and the good performers may stand out and can be recognized. It will then further improve their performance.

**Recommendation**

Assess the areas in the project where the resource utilization efficiency is medium, and identify the root causes. Some of the possible reasons are poor work organization, insufficient training, lack of experience, organizational culture, low morale, lack of motivation. Launch an improvement plan for these selected areas, also based on the learnings from the high-efficiency activities. Recognize and reward good performers.

### 2.2.15. What is the level of team spirit in the project?

**Description**

The project members have to work together well in the team. Ideally, they support each other, maximize their contribution, discuss problems, risks, and issues in an open, constructive manner, act positively and demonstrate mutual respect. Team spirit cannot be measured objectively, but the experience Project Managers with good social skill have a clear view of it. Internal project surveys are also very useful. Several warning signs indicate low level or complete lack of team spirit. Politics, negativism, rumors, complaining about others behind their back, lack of constructive proposals are some of them. Lack of communication is many times also a symptom that people don't trust, don't want to support each other. At the same time, lack of communication may also be one or the root causes of negative team spirit. Besides the Project Manager, the line managers and sponsors also have to watch if the team spirit is good, and if not, find a way to improve.

**Your answer**

2 - Low

**Consequence**

The low team spirit indicates that the cooperation is far from sufficient in the project. The relationships are probably hostile, the people are not engaged, they don't support each other, and there are no constructive discussions. Without improvement, the likelihood of project failure is high. Very probably, significant and fast changes are necessary.

**Recommendation**

Assess the root causes of the low level of team spirit in the project team. Interview key project members to get insights. Consider involving an experienced expert to perform this task, might also be good to have a neutral observer. The project sponsor should supervise the assessment. Take corrective action as soon as possible.

### 2.2.16. Do the people, assigned to the project, meet the knowledge, experience, and soft skills requirements?

**Description**

The project team members should possess the required professional, technical and soft skills. Experience in similar projects and certifications may also be necessary, especially in senior roles. Some of these skills can be validated upfront based on education, track records, and via consultation with the line managers. If the personnel is stable, the internal assessments are highly reliable. During the project, the Project Manager and team leaders will see how the team member performs and gain additional insight. They can judge based on the quality of deliverables, reliability in keeping the deadline, teamwork, especially under pressure in an uncertain environment. In some cases, all team members are qualified, but they cannot work together well due to personality mismatch or because they have unresolved conflicts from the past. If PM experiences a mismatch between the task to be performed and the participant, corrective actions are necessary. It might make sense to find a solution within the project, but I should not jeopardize the final project success. Sometimes a replacement is needed, even if an external resource should be involved at a higher cost level.

**Your answer**

2 - Majority of them meets the requirements

**Consequence**

Since the majority of the project member possesses the required professional, technical, experience, and soft skills requirements, the probability of complete project failure or at least serious deficiencies is medium to low. Nevertheless, it is likely, that there is a possibility to improve the situation, at least gradually. Some resource owners may allocate a more experienced colleague to the project. Perhaps a key colleague finished another assignment and could join the project now. Maybe, an external resource with specialized knowledge can support the project for a shorter duration.

**Recommendation**

Prepare the inventory of the missing skills in the project. Set the priorities according to the criticality of the resources and the skills in the project. Create an action plan and request approval from the Steering Committee. Until all gaps are filled, reallocate the more experienced team members to the critical project tasks whenever possible.

### 2.2.17. Is resource assignment planned in time to enable on-boarding?

**Description**

Resource mobilization takes time. Internals are performing other activities and agreement has to be made with their manager when they should and can start. Externals are working on another assignment; a commercial negotiation should be concluded and agreed when they can join the project. Project Manager has to understand what the mobilization time requirement is. During planning, PM has many internal and external negotiations and creates the plan that is feasible also considering the availability of the resources and the required mobilization time. If the PM is not able to get the internal resources (e.g., a critical business analyst is working on another assignment at least for an additional four-month), it should be reflected in the project report. Moreover, PM has to prepare options like delaying the whole project or adding a few weeks task to find and mobilize another business analyst. Sometimes the project is well prepared, all resources are identified and pre-aligned, but the project approval is in delay. When the delay is shorter, the resource might be assigned to other ad hoc activities to avoid waste. However, when the delay is longer, the resource owners might step back from original agreements.

**Your answer**

3 - It is planned in time for the majority of the resources

**Consequence**

In case there is not enough time to mobilize some of the resources, it may cause harm both to the project and the line organization. Since only a few resources are missing, the project will be probably able to solve it without severe problems. An additional expert can perform the task temporarily, the management may allocate the team member to the project at the expense of other activities, or the Project Manager reallocates existing team members to the more critical tasks.

**Recommendation**

In case the project is in the preparation phase, plan sufficient time to onboard those team members as well, whose allocation is not committed yet. If it is too late, find a temporary solution until the final onboarding. Examples are an additional expert, allocation of the team member at the expense of other activities, or reallocating existing team members to the more critical tasks.

### 2.2.18. What is the commitment level of the Steering Committee members to support the project with resources?

**Description**

The Steering Committee members should support the project with resources in several ways. They have to assign the resources and assure the appropriate priorities in case of resource conflict among projects, and between projects and line activities. They must allocate the resources in time. If the SC members decide too late on the project launch or significant Change Requests, the resources may start to work on something else and would not be easy to mobilize them as planned. They have to send a clear message within their organizational domain that the project is essential and they expect full support. They also have to free up sufficient time in their calendar to deal with the project resource issues, planned and ad hoc. If an urgent escalation arrives, they should react fast.

**Your answer**

3 - Medium

**Consequence**

When the support from the Steering Committee members is at a medium level to ensure the resources, they don't exercise thoroughly one of their fundamental responsibilities. There may be different reasons behind their approach. They may be convinced that the resources are already sufficient in all areas or may be concerned, that additional resources will turn the Business Case into negative. It is possible that there other projects or line activities with a higher priority. In any case, the situation generates a risk of delay or other deficiencies.

**Recommendation**

Discuss openly with the Steering Committee members what kind of risk is generated by their medium level of support regarding project resources. Explain the areas where more support would decrease project risk, or even the implementation time or the budget.

### 2.2.19. What is the level of commitment of team members to reach the project goal?

**Description**

The commitment of team members is essential to reach the project goal. There are many different external motivation tools and methods, like formal performance evaluation, bonus, a contribution of the experience to the personal career. Besides, internal commitment and motivation are also essential. When the team member truly wants to make the project a success, it fosters problem-solving, teamwork and fast issue resolution. They will put all possible effort and take the extra mile. Project Managers should know what the motivation and commitment level is. Most information can be gained during the work if the PM has sufficient social skills. In some cases - like when motivation-related problems arise - it makes sense to run a quick anonymous survey. Just a few minutes and few answers can provide the PM with eye-opening insight where the problem is and what the solution can be.

**Your answer**

3 - Medium

**Consequence**

Since the commitment level of the team members is medium, there is a risk of delay, budget overrun, and quality issues. Some of the potential reasons are lack of clear and motivating project goal, mediocre social skills of the Project Manager and the team leaders, forced participation, seemingly unreasonable targets, not enough management attention, medium morale in the whole organization, no cooperation among the departments.

**Recommendation**

Assess why the commitment level of the project team members is medium. Consider involving HR or other internal or external expert. Create an action plan and implement with medium priority.

### 2.2.20. Are the assignments to the project confirmed by the line managers in the form of written assignments letter?

**Description**

The role or the assignment letter is to document the agreement on the project-related activities of the colleague. Besides the project goal and short description, it should include for the person at least the schedule, required time, role and reporting line in the project. It is good practice to add success and personal performance evaluation criteria and expected behavior and attitude. The project members report to the Project Manager during the project phase. At the same time, in most cases, they have a line manager as well. It is also a common practice that the employees are assigned to the project only part-time. Sometimes they participate in more than one project. It means that their activity is lead by one or more project in addition to the line manager during the same period. The line managers are responsible for hiring, appraisals, salary negotiations, evaluations, promotions, and layoffs in most cases. It is crucial that the colleague has clear guidance from the line manager that some of the capacity should be devoted to the project. As a form, the signature of an assignment letter on paper or via mail demonstrates that the assignment was agreed with and committed by the line manager. Without a written confirmation, all sides might be in an uncomfortable situation. The manager feels bypassed an overruled. The project participant feels uncomfortable when working on project task instead of line activity. Finally, the Project Manager feels insecure, because the participation of the resource is not committed in written form. It is good practice to give a written assignment letter (paper or email) to the participants, signed by their manager or higher level in line organization. The assignment letter should include the project goal, why it is essential, the role of the person, the duration and workload (e.g., April-October in 40% of the time) and the reporting line within the project. In the case of significant changes, a new assignment letter is necessary. The Project Manager should validate if all the assignments are available that are necessary according to the Resource Plan.

**Your answer**

2 - There are a few assignment letters

**Consequence**

The lack of the majority of the assignment letters may cause problems to the Project Manager, the line manager, and the impacted project member. The Project Manager doesn't have a committed allocation for the majority of the project members, that he or she could take into consideration Resource Planning. The impacted line manager has no formal information on the assignment to the project tasks. As a consequence, it is not clear what capacities are available for line tasks. Last but not least, without an assignment letter, the team member doesn't have written information about the role, timing, and expectations. Since a project assignment may play an important role in personal carrier development, this uncertainty may cause stress and lack of motivation. Under some labor law, it is even not compliant to the regulations it an employee has to work in a project structure without a written assignment.

**Recommendation**

Prepare, negotiate with the line managers and hand over the missing project assignment letters. The format should fit the intended culture of the organization. In some cases, the language may be detailed, serious, and formal. Other organizations may prefer a less official, shorter document. If necessary for the consistency, update the existing assignment letters.

### 2.2.21. If vendor contribution is needed, is the contract preparation, negotiation, approval and on-boarding time included in the Project Plan?

**Description**

When the projects involve externals, appropriate contracts/work orders have to be in place. Even if all the contract drafts, work order templates are available, and there are agreed unit prices, time is needed to finalize the commercial and legal documentation, and to approve and sign on both sides. Sometimes a small change requires days of negotiation and escalation to higher levels which is not always available immediately. When parties signed the contract or work-order, they can start the on-boarding. The whole process takes time. If it is not part of the Project Plan, there may be different outcomes, none of them are ideal. One extreme is that the parties make a verbal agreement and start on-boarding and working without formal documentation. It not only involves risks on both sides and limits the room to maneuver during the negotiation, but is in most cases a violation of internal policies. On the other extreme, it may happen, that when the parties follow all formal steps, there is a delay. A potential solution is to agree on a way in-between, e.g., working based on Letter of Intent or other temporary agreements. It would probably eliminate or decrease the delay but may also limit the power and freedom in the negotiations and violate the internal regulations.

**Your answer**

2 - A smaller portion of activities is included

**Consequence**

The contract negotiation, approval, signing and vendor resource onboarding will require time, even is in some cases not very long. Since the majority of these tasks is not planned, either the dependent tasks will be delayed, or the utilization of resources will start without proper contract or work order. In some cases, it may not cause significant problems, because the supplier relationship is stable and proven. However, when the vendor relationship is new, or there were already problems with negotiations or delivery, the risk is high.

**Recommendation**

Reschedule the Project Plan to include the missing vendor contract negotiation, approval, signing and vendor resource onboarding. In case a delay is not acceptable due to external regulatory or other mandatory requirements, sign temporary Letter of Intent only following a careful risk assessment.

### 2.2.22. What is your overall evaluation of Resource Management activities in the project?

**Description**

The overall evaluation presents the general perception of the evaluator about the Resource Management activities. While it is less fact and evidence-based that most of the other questions, it gives a vital hint of what the general state of Resource Management is. In case there is a significant difference between the overall evaluation and the average of the other answers, it may trigger further actions.

**Your answer**

3 - Medium

**Consequence**

The difference between your overall evaluation (3) and the average of your answers (2.52) is not more than 0.5. This is a good match.

**Recommendation**

No action is proposed here.

## 2.3. Survey level evaluation

Beyond the individual questions and answers, the relationship between the different answers can also indicate issues and problems that require a solution. This sub-chapter contains analysis and recommendation based on inter-answer relationships.

**Finding 1**

It seems that there is a significant risk that the currently allocated resources will not be sufficient to complete the project ("Are the assigned resources enough to complete the project?" - "2. It might be enough with high risk"), but the managers don't have a regular resource review ("Is Resource Plan, Actual and Forecast regularly reviewed by the Sponsors / Management?" - "3. They review the resource status at least once in a quarter").

**Consequence**

The Sponsors / Management can provide the project with effective support when needed; when the budget risk is relevant, this support is essential. They can assign additional employees to save external costs, mobilize their network to find quickly knowledgeable external partners, to mention a few. Without regular and frequent resource reviews, they will not take measures in time.

**Recommendation**

The Sponsors / Management should review the Resource Plan, Actual and Forecast regularly, preferably more frequently than monthly, while the risk of not sufficient resources is significant.

# 3. Actions

The list of action includes the description of the action, the reference to the sub-chapter and the priority. The following factors drive the prioritization:

• The grades of the answers

• Relations between questions and grades, consistency and statistical parameters

|  |  |  |  |
| --- | --- | --- | --- |
| **No** | **Action** | **Ref** | **Prio** |
| 1 | Review the project Resource Management (plan, mobilize, lead, measure, motivate) tasks immediately and insert the missing activities in the Project Plan. | 2.2.1 | 2 |
| 2 | Expand the Timesheet data registration, collection, analysis and reporting to the missing activities immediately in the project. Make sure, that it includes at least the name of the person, task identifier and hours spent. Improve the content and methods if needed. | 2.2.10 | 2 |
| 3 | PMO should improve project support immediately. Most important areas are the methodology support and the quality checks of the project work and deliverables. Agree on cooperation methods and schedule, and proceed accordingly. | 2.2.12 | 2 |
| 4 | Establish the evaluation and feedback process that covers the entire project team. Inform all team members about the next steps. Afterward, follow the process and hold the feedback sessions with everyone, not only with a few selected colleagues. The Project Manager should also ask for feedback. | 2.2.13 | 2 |
| 5 | Assess the root causes of the low level of team spirit in the project team. Interview key project members to get insights. Consider involving an experienced expert to perform this task, might also be good to have a neutral observer. The project sponsor should supervise the assessment. Take corrective action as soon as possible. | 2.2.15 | 2 |
| 6 | Prepare the inventory of the missing skills in the project. Set the priorities according to the criticality of the resources and the skills in the project. Create an action plan and request approval from the Steering Committee. Until all gaps are filled, reallocate the more experienced team members to the critical project tasks whenever possible. | 2.2.16 | 2 |
| 7 | Assess the risk of not sufficient project resources and possible consequences. Put higher emphasis and priority on resources that are not easy to assign, and the lack of availability would have more severe consequences. Discuss it with the Steering Committee. Assign additional resources according to the criticality of the project and the risk appetite of the organization. | 2.2.2 | 2 |
| 8 | Prepare, negotiate with the line managers and hand over the missing project assignment letters. The format should fit the intended culture of the organization. In some cases, the language may be detailed, serious, and formal. Other organizations may prefer a less official, shorter document. If necessary for the consistency, update the existing assignment letters. | 2.2.20 | 2 |
| 9 | Reschedule the Project Plan to include the missing vendor contract negotiation, approval, signing and vendor resource onboarding. In case a delay is not acceptable due to external regulatory or other mandatory requirements, sign temporary Letter of Intent only following a careful risk assessment. | 2.2.21 | 2 |
| 10 | Define the structure of the project Resource Plan, actual and forecast report. Ask feedback from the recipients of the current ad hoc report and use it when defining the document. Set frequency depending on the audience and the nature of the project. As a default, a weekly operative and a monthly executive-level report may be a good starting point. If necessary, also align with the controlling unit of the organization. | 2.2.3 | 2 |
| 11 | Complete the existing project knowledge transfer plan with the missing elements. Make sure that it includes in details the knowledge domain, the list of supporting documents, the future knowledge owner and the timing of knowledge transfer. Finalize the plan after the design phase and start the transfer gradually. | 2.2.9 | 2 |
| 12 | The Sponsors / Management should review the Resource Plan, Actual and Forecast regularly, preferably more frequently than monthly, while the risk of not sufficient resources is significant. | 2.3 | 2 |
| 13 | Assess the areas in the project where the resource utilization efficiency is medium, and identify the root causes. Some of the possible reasons are poor work organization, insufficient training, lack of experience, organizational culture, low morale, lack of motivation. Launch an improvement plan for these selected areas, also based on the learnings from the high-efficiency activities. Recognize and reward good performers. | 2.2.14 | 3 |
| 14 | In case the project is in the preparation phase, plan sufficient time to onboard those team members as well, whose allocation is not committed yet. If it is too late, find a temporary solution until the final onboarding. Examples are an additional expert, allocation of the team member at the expense of other activities, or reallocating existing team members to the more critical tasks. | 2.2.17 | 3 |
| 15 | Discuss openly with the Steering Committee members what kind of risk is generated by their medium level of support regarding project resources. Explain the areas where more support would decrease project risk, or even the implementation time or the budget. | 2.2.18 | 3 |
| 16 | Assess why the commitment level of the project team members is medium. Consider involving HR or other internal or external expert. Create an action plan and implement with medium priority. | 2.2.19 | 3 |
| 17 | Explain to the Sponsors / Management why quarterly project resource review meetings are not sufficient. They have to devote time ideally at least every month. Resource review is usually part of the overall project review. The focus is on the availability of critical resources. | 2.2.4 | 3 |
| 18 | Improve the project Resource Management process so that it covers all involved activities. The goal is to assure the complete understanding and control of the project resources, especially the timely availability of all resources. One input of this improvement can be a workshop with stakeholder to identify what is missing today. | 2.2.5 | 3 |
| 19 | Assess, why 10% to 25% of resources bypass the project Resource Management process. The reason may be an inadequate and overcomplicated process, lack of discipline in project work, insufficient education, missing project controls. Since the participants follow the process in most of the cases, a restructuring, training and improved control will probably improve the situation a lot. | 2.2.6 | 3 |
| 20 | Add the missign elements to the project Resource Plan, based on the detailed task list. When ready, cross-check with the current Resource and Cost Plans and adjust wherever needed. In the case of budget gaps, submit to the Steering Committee for approval. | 2.2.7 | 3 |
| 21 | Modify the Resource Management process to ensure that the Resource Plan is always up to date. Inform and educate the project team members, so that they continuously update the Resource Plan in case of relevant decisions like approved Change Requests or risk mitigation actions. The project should keep the Resource Plan always up to date according to related decisions. | 2.2.8 | 3 |
| 22 | Discuss within the project if there any further possibilities to improve the cooperation between the Project Manager and the project team. Don't overdo, but a one hour open and collaborative workshop may reveal additional options. | 2.2.11 | 4 |

***Legend***

*No: Sequence number*

*Action: Description of the recommended action*

*Ref: Reference to the chapter of this document that includes more details*

*Prio: Recommended priority of the action, 1 is the highest and 5 is the lowest*

# 4. Recommended Tools

upify IT prepared several tools that can support the implementation of the recommendations in this survey. You can download the files from the https://upifyit.com/ site on the evaluation page of the survey.

|  |  |  |
| --- | --- | --- |
| **Name** | **Description** | **File** |
| Change Log | The project Change Log includes all changes; it is the underlying document of the Change Management process. | Change\_Log.xlsx |
| Business Case | Project Business Case, including Costs, Benefits, and a simple DCF (Discounted Cash Flow) calculation. | Business\_Case.xlsx |
| Cost Plan | Template for the project cost plan. It includes calculations for five years and more than 50 different cost items as an example. | Cost\_Plan.xlsx |
| Resource Plan | The template includes a detailed Human Resource requirements sheet with a monthly breakdown, and also the Other Resources sheet. | Resource\_Plan.xlsx |
| Time\_Sheet | A template to register the consumed times of a project participant in an hourly granularity. | Time\_Sheet.xlsx |