Gaining Approval

by Sophia

1. Timing of Approval

Before a project can move forward and work can begin, a fully-developed project must gain **project plan approval**.

The project manager should organize a planning approval meeting and invite all people who need to approve the plan. A representative from each stakeholder group should attend. Though it's beneficial to have a single meeting that includes all groups, the project manager can have individual meetings as well.

TERM TO KNOW

Project Plan Approval
A process of gaining stakeholder approval from individuals with sign-off authority to begin executing on a project.

2. Planning Approval Meeting

Meetings can be live or through video conferencing. The project manager should prepare the agenda for the meeting and review all the materials so that they can be ready for any questions that might arise.

The meeting agenda should include:

- Review of the project scope: anything that has changed since the initial sign-off on the scope should be noted
- High-level review of the project schedule: discussion of individual tasks would be too much information for this meeting, so discussion of the schedule at the activity level is appropriate.
- Review of all person or non-person resources that will be necessary to complete the project deliverables. Any skill or resource gaps should be called out by the project manager.
- Review of the project budget: if a reserve or contingency has been added to the budget this should be noted.
- Risks and mitigations for those risks should be covered.
- Communication plan should be discussed. The project manager should point out the feedback path for stakeholders to encourage the use of that channel.

The project manager should present or coordinate the presentation of all material, then provide an opportunity for the stakeholders to discuss the plan and ask questions. The project manager should be prepared for more in-depth discussion. If an answer is not available, the project manager should let the questioner know when the answer will be provided and by what method the information will be delivered.
So what might this response look like if a project manager doesn't have an immediate answer?

⤳ EXAMPLE "I don't know that answer right now, but I'll provide that material to all the stakeholders by email, by the end of work today." Note the time and method of communication.
When all the questions have been addressed, then the project manager should seek sign off from the stakeholders with sign off authority.

🚩 HINT

Commonly, the project sponsor is the only stakeholder with sign off authority.
Sometimes, plan changes will need to occur before some or all stakeholders sign off. In that case, the project manager should determine whether an additional approval meeting will need to be held. Once all stakeholders who need to approve the plan have signed off, the project manager can begin executing the plan.

⭐ BIG IDEA

Project plan approval meetings ensure alignment with organizational goals, resource allocation, and feasibility (e.g., project scope, objectives, stakeholders, budget). They provide a high-level review, and detailed task descriptions are addressed in subsequent planning stages.

3. Baseline

At this time, the plan is baselined for the project. This means that the time, scope, and cost are documented and used as the basis for management of the project.

⤳ EXAMPLE If cost increases, the documentation and the discussion about the new cost should refer to it as a percentage or dollar increase over the baseline cost. Such as, the project will add $12,000 over the

original baseline budget of $100,000.

📋 SUMMARY

This lesson discussed the process of gaining approval from stakeholders. The **timing of an approval** meeting occurs only after a project is fully developed. **When planning an approval meeting**, you need to know six elements of an approval meeting should include scope, schedule, resources, budget, risks & mitigation, and communication processes. Remember, the project sponsor is the most common stakeholder with sign off authority and a **baseline** of time, scope and cost are documented to measure variance as the project is executed.

Source: this work is adapted from sophia author jeff carroll.

📄 TERMS TO KNOW

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