

Using SharePoint to Manage Project Changes and Impacts

One of my favorite questions when interviewing potential project management candidates is, “How do you manage change to your baseline plans.” First of all, many candidates fall into the trap of thinking baseline plans is the same thing as the schedule. Others think that change relates to customers adding features and functions to the product. The easiest way to describe change from a project perspective, is change represents anything that is a permanent (vs. timing) deviation from the original plans that define what is going to be delivered (scope), when it will be delivered (schedule), and how much it will cost (budget).

Using collaboration tools, such as SharePoint, to manage change does not replace the diligence required to identify and manage project impacts effectively, but it does streamline the processes associated with documenting, reviewing and approving the change requests. In addition, SharePoint enhances the ability to effectively communicate project changes throughout the project life cycle.

Creating the Change Request Log

I find it easiest to use a Custom list to create the Change Request Log in SharePoint. The following are the fields I add to this list to improve the identification and tracking of change requests based upon the best practices associated with Project Change Management:

- **Id** – System assigned unique identifier assigned for the change.
- **Title** – Headline associated with the change request (make sure it is descriptive enough to identify the item from the summary view of the change requests).
- **Status** – Drop down selection: Not Started, Documented, Reviewed, Approved, or Implemented.
- **Cost Impact** – Numeric field for the estimated impact the change request will have on the project budget.
- **Schedule Impact** – Numeric field for the estimated impact the change request will have on the project schedule.
- **Scope Impact** – Text field utilized to describe the impact the change request will have on the scope of the project.
- **Comments** – Text field utilized to describe the current status of the change request.
- **Attachments** – The change request should be supported with more details explaining the request and estimated impacts. A completed project impact document is attached to the change request item.

Below is an example of the Change Request form in SharePoint, and the Project Impact Report template.

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Change Request Tracking - New Item

Edit

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

Title * Additional Resource Required

Date 4/17/2011
Date the change request was submitted

Status Documented
Status of the Request

Prepared by Hart, Steve ;
Person that documented the change request

Sched Impact -5
Schedule Impact in Days

Cost Impact 2500
Cost impact in Dollars

Scope Impact No scope impact
Impact of change on scope

Comments In process
Status Comments

Save Cancel

Project Impact Report

Project Name: Project Manager:

Project Impact Title: Project Sponsor:

Date:

Scope Change Schedule Cost

Background

Impact Description

Impact Estimate

Approvals

Project Manager:
Project Sponsors:
Project Owner:
Other Stakeholders:

Impact Follow-up

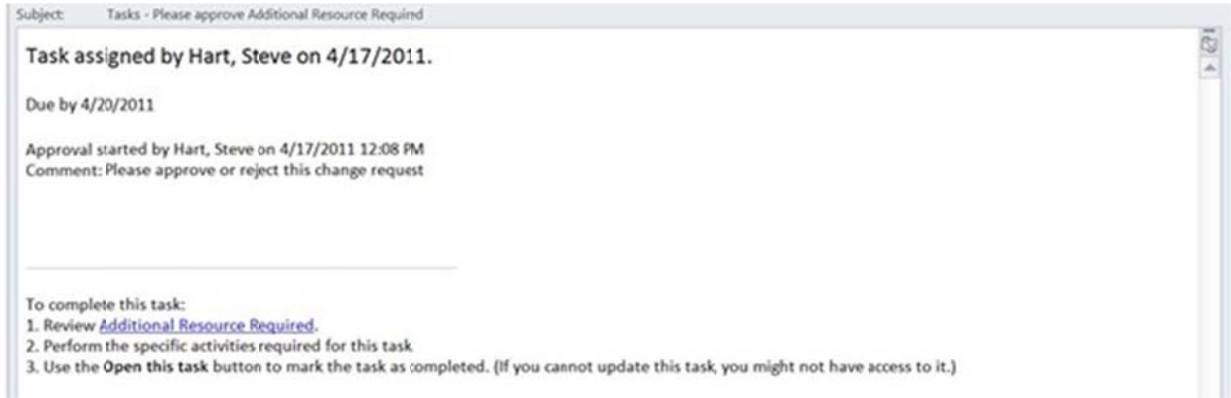
Based upon approval of this Project Impact Report, the following actions will be implemented:

- 1.

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Managing the Approval Process Using Workflow

Creating workflow for this SharePoint list helps automate the approval and tracking process. At the time the item is added to the SharePoint list, an email is sent to the approver (see below for an example of the email).



From this email, the approver can Approve, Request a Change, Reassign, or Reject the change request (see an example of the approval pop-up that is displayed within Outlook).

Status	Not Started
Requested By	
Consolidated Comments	Approval started by Hart, Steve on 4/17/2011 12:08 PM These are the comments of the requestor and all previous participants.
Due Date	4/20/2011
Comments	Cannot impact budget at this time This message will be included in your response.
<input type="button" value="Approve"/> <input type="button" value="Reject"/> <input type="button" value="Cancel"/> <input type="button" value="Request Change"/>	
<input type="button" value="Reassign Task"/>	

Once the approver performs the approval process, the status of the workflow is updated within the SharePoint list (see the Change Request Workflow column of the All Items view below).

Change Request Tracking > All Items -

ID	Title	Date	Sched Impact	Cost Impact	Prepared by	Scope Impact	Comments	Status	Change Request Workflow
1	Additional costs for Branding	3/16/2011	0	\$5,000.00	Hart, Steve	No impact on scope	Review in process	Implemented	Approved
5	Additional product features	3/23/2011	5	\$2,500.00	Hart, Steve	Adding features to the main site		Documented	Rejected
9	Additional Resource Required	4/17/2011	-5	\$2,500.00	Hart, Steve	No scope impact	In process	Documented	In Progress

Add new item

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I find it is best to keep the workflow straightforward, with no more than 2-3 approval levels. The benefits associated with approval automation can be lost in time spent on manual intervention if the workflow is too complicated.

Cumulative Impact of Change

It is important to understand the cumulative impact of changes on a project with regards to the scope, schedule, and cost/ budget. Throughout the life of a project, there will be changes. The project core team, project sponsor, and steering committee members should be aware of the cumulative impact of changes (comparing current project performance to the original expectations established in the baseline plan).

The project manager is ultimately responsible for project execution against the baseline. The project manager should be able to explain the evolution of that plan from the original baseline to the current baseline, including all approved changes that have been implemented. Project managers often will fall back on the excuse that the project is over budget or late because there were constant changes, but often cannot quickly explain the changes that account for the primary deviations from the original plan. Effective use of the Change Request Log provides a tool to track and reconcile changes to the baseline plan (and provide as a regular project performance metric).

I create another view within the Change Request list to communicate the cumulative impact of change on the project. This new view filters for only approved or implemented requests, provides a total count of approved/implemented requests, and sums the total schedule and cost impacts. Below is an example of the approved requests view of the change requests.

Title	Date	Sched Impact	Cost Impact	Scope Impact	Status
Additional costs for Branding	3/16/2011	0	\$5,000.00	No impact on scope	Implemented

Summary

SharePoint provides a great vehicle to capture and track change requests in a timely and accurate manner. In addition, adding workflow to the SharePoint list automates the change review and approval processes. The information captured within this list allows the project manager to communicate effectively around the team's ability to manage change and accurately describe the cumulative impact of this change on the project.