Appoint project manager and team; define project plan

At this stage a decision has been made to continue with the project. A first step is to appoint a project manager who will be responsible for handling the day-to-day needs of the project and making any adjustments and consultations necessary.

An internal project plan should be defined for implementation of the data exchange as a data provider. The main inputs to this plan are the analysis outputs from the previous phase. Any previous project evaluations/lessons learned should be consulted to help use the best road-tested techniques, and avoid poor solutions; however, different techniques and tools may be appropriate to different projects.

All internal stakeholders should approve the plan before implementation starts.

A roadmap is a key part of the project plan including deliverable milestones that are used to judge if the project is on track, and to prepare for the next work packages. A work breakdown that is linked to the roadmap can identify who will do what, which can be used to choose who will participate in the project. The roadmap activities must be planned so that the intermediate milestones (such as a pilot) and the final production milestone are respected, but also allow reasonable contingency.

A risk analysis management section should be included to handle possible events that can threaten the successful implementation schedule must be identified and eventually provided alternative solutions also (if needed) involving data collector.

A section should list the different consultation groups and their roles; and events such as working parties, management meetings that need to be informed and/or approve of the project status.

The plan should be used to drive the project and reflect the current status of the project at all times, and not be an afterthought.

An “Issue log” should also be created in the planning. It is a documentation element of project management and it can be used to track the issues through the project, design and build, and in testing. A template is available here. For larger projects it is recommended to use an issue tracking system such as Jira.

Outputs of this phase:

- the project manager appointment;
- the project plan;
- the project team member appointments