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THE COMPLETE PROJECT CASEBOOK 50

A Complete Project in 25 Pages: From Idea to Handover



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One project from idea to handover

Follow a small, fully connected case rather than isolated templates.

The case

The Meeting Room Booking Pilot introduces a simple intranet booking process for two meeting rooms. All organisations, estimates, costs and results in this handbook are fictional learning examples.

The route

Define the need, authorise scope, plan work and cost, manage delivery, assess a change, resolve a defect, accept the result and hand it to operations. Each page creates or updates a practical record.

The boundaries

The PDF has twenty-two numbered learning pages, one cover and two linked advertisements: twenty-five pages in total. Reuse the record structures and replace the example assumptions with evidence from your project.

TAKE IT TO YOUR PROJECT

Keep a small case log as you follow the decisions and calculations.

01 / Build the business case

Start with a problem and a measurable intended benefit.

Need and alternatives

Manual room requests generate conflicting reservations. Consider keeping the current process, improving its instructions or piloting an intranet booking tool before a wider commitment.

Benefit hypothesis

The fictional baseline is six conflicts per hundred booking attempts. The intended outcome is at most two per hundred, assessed over a comparable thirty-day period after handover.

Decision and owner

The sponsor chooses a two-room pilot because it tests the approach with limited exposure. The operating owner will collect attempts and conflicts; benefit achievement is not assumed from installation alone.

TAKE IT TO YOUR PROJECT

Write the baseline, target, measurement window and benefit owner.

02 / Authorise a compact charter

Define the commitment and who can change it.

Charter extract

Purpose: test a usable, supportable booking process for two rooms. Original target: finish at elapsed working day 11 from a day-0 start. Total funding limit: 10,000 in illustrative monetary units.

Authority

The sponsor approves scope and target-date changes. The project manager coordinates delivery and may approve documented contingency uses up to 500 per event within the baseline, following the case's agreed rule.

Boundaries and approval

The operating lead owns acceptance and continuing service. The sponsor approves the charter before controlled commitments are made; delegated authority does not override technical or operating acceptance.

TAKE IT TO YOUR PROJECT

Identify the decision maker for scope, date, expenditure and acceptance.

03 / Confirm stakeholders and roles

Name the people who provide inputs, deliver work and accept the result.

Working roles

Sponsor: business authority. Project manager: coordination and controls. IT lead: design and configuration. Tester: independent scenario evidence. Trainer: operator preparation. Operating lead: readiness, service and benefits.

Engagement needs

Room users need realistic booking scenarios and clear instructions. The operating lead needs support, access and recovery arrangements. IT needs a confirmed hosting and licence basis.

Responsibility check

IT owns configuration delivery; the operating lead is accountable for operating acceptance. The project manager coordinates the acceptance process and records the decision. Confirm resource availability with the relevant owners.

TAKE IT TO YOUR PROJECT

Ask two adjacent owners to explain their handoff and required evidence.

04 / Define scope and acceptance

Make the pilot small enough to plan and specific enough to judge.

Included and excluded

Include two rooms, create/cancel/view booking journeys, configuration, instructions, administrator training and a monitored pilot. Exclude additional sites, mobile applications and analytics reporting.

Acceptance evidence

Agree twenty-five synthetic test scenarios, including concurrent requests for the same slot, cancellation and invalid input. Two administrators must complete an operating rehearsal before the monitored pilot begins.

Decision route

The operating lead accepts readiness and pilot evidence; the IT lead confirms technical conditions. A request outside these boundaries requires an assessed, authorised change.

TAKE IT TO YOUR PROJECT

Link each included output to its criteria and acceptance owner.

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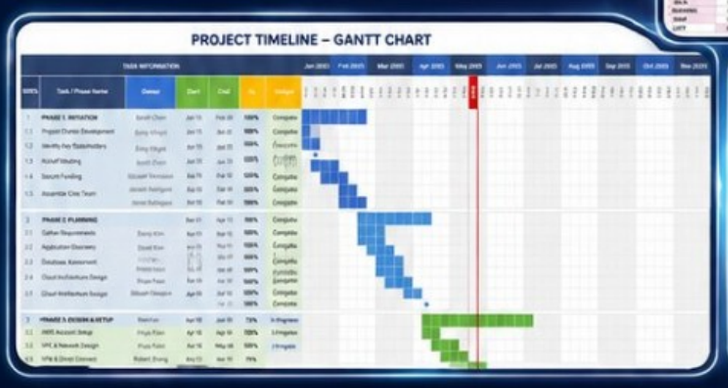
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05 / Build a deliverable structure

Use a work breakdown to check coverage before scheduling activities.

Work packages

1.1 Requirements and prototype; 1.2 configured booking service; 1.3 verified scenarios; 1.4 trained administrators and instructions; 1.5 monitored pilot and handover; 1.6 accepted licence entitlement.

Dictionary example

Package 1.2 covers configuration for the two rooms, using agreed journeys and a confirmed licence. IT lead owns it; technical review confirms the configuration version before integrated operating tests.

Coverage check

The work structure includes both the tool and the means to operate it. Keep later corrective activities connected to their work package rather than treating rework as unrelated scope.

TAKE IT TO YOUR PROJECT

Check that every promised output appears exactly once in the work structure.

06 / Record the estimate basis

Make time and cost assumptions reviewable.

Working assumptions

Use one five-day working calendar with elapsed-day boundaries. The tester and trainer are separately available, so testing and training may overlap. Licence entitlement is ready before configuration starts.

Estimate approach

Owners estimate the required activities and costs from the defined pilot scope. Include reviews, test evidence, instructions and handover. Review the remaining estimate whenever evidence changes.

Uncertainty treatment

Assess named risks and include 700 contingency inside the 8,700 cost baseline. Hold 1,300 management reserve outside it, giving 10,000 funding. These allowances are case assumptions, not universal percentages.

TAKE IT TO YOUR PROJECT

Record the assumption most likely to affect both the schedule and estimate.

07 / Sequence the six activities

Calculate dates from the agreed dependencies.

Activity network

A requirements: 2 days. B prototype: 2 after A. C configuration: 3 after B. D testing: 2 after C. E training and instructions: 1 after C. F monitored pilot: 2 after both D and E.

Forward pass

A finishes at 2; B at 4; C at 7; D at 9; E at 8; F starts at max(9, 8) and finishes at 11. The controlling sequence is A-B-C-D-F.

Feasibility check

The parallel D and E activities use separately confirmed resources. E has one working day of float under this network. Final operating acceptance and handover occur after F.

Activity	Days	After
A / requirements	2	None
B / prototype	2	A
C / configuration	3	B
D / testing	2	C
E / training	1	C
F / pilot	2	D and E

TAKE IT TO YOUR PROJECT

Recalculate the finish if testing requires one additional working day.

08 / Approve the cost baseline

Reconcile work costs, contingency and total funding.

Activity estimates

A 800; B 1,200; C 2,400; D 1,600; E 600; F 800. These six activities total 7,400. Licence entitlement adds 600, giving planned work and purchase cost 8,000.

Budget and funding

Add assessed contingency 700 to obtain BAC 8,700. Add management reserve 1,300 outside BAC to obtain total funding 10,000. Keep each comparison visible in reporting.

Control rule

Record the sponsor's approval and the delegated contingency rule. An unapproved feature does not become authorised simply because unused funding exists.

TAKE IT TO YOUR PROJECT

Reconcile the activity subtotal, baseline and funding limit independently.

09 / Turn risks into responses

Focus the register on decisions and practical actions.

Risk example

R01: configuration may fail under simultaneous booking requests, causing rework and delay. Illustrative probability 0.30 and cost impact 400 give EMV 120. IT lead owns the response.

Response and trigger

Include concurrency among the agreed scenarios and review results before pilot readiness. If the behaviour fails, open an issue, assess the actual correction and update the plan.

Reserve reasoning

The 700 contingency addresses the assessed set of cost uncertainties, not only R01's EMV. EMV is an expected value and does not establish the correct allowance for a particular project by itself.

TAKE IT TO YOUR PROJECT

Give the risk an evidence-based trigger and a named response owner.

10 / Set communication and control

Keep the working records small, current and connected.

Cadence

Use a brief delivery check each working day, a sponsor checkpoint after configuration and a readiness decision before the monitored pilot. Raise blockers when their decision deadline cannot wait.

Core records

Maintain current scope, schedule, cost forecast, risk and issue registers, change requests, decisions and acceptance evidence. Give each an owner, version and authoritative location.

Status rules

Use a common cutoff. Distinguish approved target, current forecast and actual results. A proposed change stays visibly pending until the right authority decides it.

TAKE IT TO YOUR PROJECT

Agree the shortest reliable route for an urgent date or scope decision.

11 / Kick off and secure the input

Convert the approved plan into acknowledged commitments.

Kickoff outcomes

Confirm purpose, two-room scope, twenty-five scenarios, authority, resource availability, key dates and the first actions. Read back decisions and obtain owner acknowledgement.

Licence input

Procure the specified entitlement for 600 through the agreed route. Record its acceptance and operating conditions before configuration relies on it. Avoid assuming a purchase alone proves technical readiness.

Proceed with evidence

IT confirms the environment and licence input; the trainer and tester confirm availability. Unconfirmed items remain actions or risks with owners rather than silent assumptions in the schedule.

TAKE IT TO YOUR PROJECT

Verify the input that must exist before configuration can start.

12 / Deliver through working day seven

Track accepted work packages and their actual cost.

Delivery evidence

A finishes at day 2, B at 4 and C at 7. The configuration passes its defined technical review; integrated operating acceptance still depends on D and the pilot. Licence entitlement is accepted.

Actual cost

A costs 800, B 1,200, C 2,600 and the licence 600. Actual cost at day 7 is 5,200. Configuration is 200 above its 2,400 estimate.

Document the difference

The project manager records the approved 200 contingency use under the charter rule. Remaining planned D, E and F cost is 3,000; remaining risk allowance is now 500.

TAKE IT TO YOUR PROJECT

Check that a work-package acceptance is not being described as final operating acceptance.

13 / Report the day-seven position

Use the same scope and cutoff for budget, value and forecast.

Earned-value basis

The approved method earns budgeted work-package value on the defined completion evidence. At day 7, A, B, C and licence give EV 5,000 and PV 5,000; AC is 5,200.

Calculate and interpret

CV = 5,000 - 5,200 = -200. CPI = 5,000 / 5,200, about 0.96. Remaining ETC is 3,000 planned work plus 500 risk allowance = 3,500; EAC = 5,200 + 3,500 = 8,700.

Status message

The forecast still fits BAC 8,700 and finish day 11, subject to testing and pilot evidence. Explain that the 200 actual excess has reduced the remaining allowance; do not add the original 700 again.

TAKE IT TO YOUR PROJECT

Reconcile the completion forecast with the remaining risk allowance.

14 / Assess an additional feature

Protect the agreed pilot boundary through a visible decision.

Change request CR01

A stakeholder requests analytics reporting. Initial assessment estimates 300 additional cost and one working day, subject to detailed confirmation. Analytics was explicitly excluded from the approved pilot.

Options and decision

The sponsor considers adding it now or reviewing it after the operating results. The decision is to defer it for separate assessment after the pilot, preserving the current scope.

Update the record

Log the request, assessment, decision, authority and future owner. Do not add the 300 or extra day to the current approved plan when the feature has not been authorised.

TAKE IT TO YOUR PROJECT

Explain to the requester what was decided and when the idea will be reconsidered.



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15 / Resolve a real test defect

A risk that occurs needs an issue response and a new forecast.

Issue 101

During D, testing detects that two simultaneous requests can reserve the same slot. The operating lead will not accept this behaviour. IT estimates one extra working day and 400 correction cost.

Updated outlook

Testing now occupies three days from day 7 to day 10, including correction and regression. E finishes at day 8. F can start only at day 10 and now finishes at day 12.

Cost treatment

The 400 correction uses the remaining assessed allowance, reducing it from 500 to 100. EAC remains 8,700 if the correction and other remaining estimates hold. Record the cause and evidence.

TAKE IT TO YOUR PROJECT

Report the actual issue, proposed response and one-day forecast delay.

16 / Authorise the response and revised date

Choose the practical outcome with the correct authority.

Decision pack

Present the failed scenario, 400 correction, day-12 forecast, acceptance needs and acceleration alternatives. Explain that the original day-11 target cannot be met under the current feasible sequence.

Authorised outcome

The project manager approves the documented 400 contingency use under the delegated rule. The sponsor accepts the one-day delay and authorises the revised schedule baseline at day 12, preserving the original day-11 record.

Integrated update

Add the correction activity to the affected package, update testing logic, risk and issue records, and inform operators. Cost baseline remains 8,700; final acceptance conditions are retained.

TAKE IT TO YOUR PROJECT

Identify which authority approved the cost response and which approved the date change.

17 / Verify the corrected result

Acceptance requires evidence for the version that will be used.

Regression evidence

By day 10, the corrected version passes all twenty-five agreed synthetic scenarios, including concurrency, cancellation and invalid input. Record scenario results, version, reviewer and any remaining conditions.

Readiness check

The two administrators completed their rehearsal during E by day 8. The technical and operating owners review the test evidence, instructions, support arrangements and pilot entry conditions.

Decision boundary

This confirms readiness to start the monitored pilot, not proof that every future failure is impossible or that the thirty-day business benefit has been achieved.

TAKE IT TO YOUR PROJECT

Create a version-specific acceptance record for the tested result.

18 / Run the monitored pilot

Use the final activity to test operation with support in place.

Pilot plan

F runs from elapsed day 10 to day 12. Operators use the agreed process for the two rooms while IT support and the operating lead monitor exceptions through the defined route.

Collect evidence

Record observed booking outcomes, support questions and any conditions requiring action. Confirm that critical acceptance issues are resolved before final operating acceptance.

Pilot outcome

At day 12, the operating lead accepts the pilot outputs and continuing service responsibility based on the agreed evidence. The result remains limited to two rooms; wider rollout is a separate decision.

TAKE IT TO YOUR PROJECT

Check that the pilot outcome is supported by a dated acceptance decision.

19 / Hand over the operating service

The receiving owner needs practical control, not only documents.

Handover contents

Transfer current configuration and licence records, administrator access arrangements, instructions, recovery steps, known limitations, support contacts and the accepted test and pilot evidence.

Confirm responsibility

The operating lead owns the service, support review and future benefit measurement. IT support owns the agreed technical escalation. Confirm that each owner can actually perform the continuing responsibility.

Rehearse and record

Walk through a booking problem, support escalation and recovery instruction. Record the handover date, receiving owner, evidence and any continuing obligations with due dates.

TAKE IT TO YOUR PROJECT

Ask the receiving owner to demonstrate the most important operating handoff.

20 / Close cost and capture the lesson

Reconcile the final outcome against both original and revised commitments.

Final result

Actual costs are A 800, B 1,200, C 2,600, D 1,600, E 600, F 800, licence 600 and correction 400: total 8,600. Final cost is 100 below BAC 8,700; the remaining allowance is no longer forecast spend.

Schedule and closure

Finish is day 12: one day later than the original target and on the authorised revised baseline. Reconcile invoices and commitments, link acceptance and handover, then obtain the sponsor's closure decision.

Actionable lesson

Use an executable concurrency example earlier in configuration review. IT lead adds it to the next pilot checklist and checks adoption. Operating lead reviews conflict rate thirty days after handover.

TAKE IT TO YOUR PROJECT

State the delivered outcome, cost, dates, continuing owner and next benefit review.

21 / Rebuild the complete case

Use the connected record trail to practise your own project decisions.

Follow the evidence

Business case to charter; scope to work packages; activities to schedule; estimates to BAC; risks to responses; actuals to forecast; change and issue decisions to revised records; acceptance to handover and closure.

Reconcile the numbers

Original finish 11, revised finish 12. Work estimate 8,000 plus contingency 700 gives BAC 8,700. Actual 8,600 leaves 100 favourable completion variance; total funding remains 10,000.

Keep the benefit test open

Delivery and handover are complete in the case. The operating owner still measures the intended conflict-rate improvement at the agreed thirty-day review; installation does not establish benefit achievement.

TAKE IT TO YOUR PROJECT

Choose one decision and trace its authority, evidence and effect through the records.