Integrated Project Plan & Value Delivery Assurance

Comprehensive plan using a Hybrid complex-project delivery from Requirements through benefits realization



PATCA
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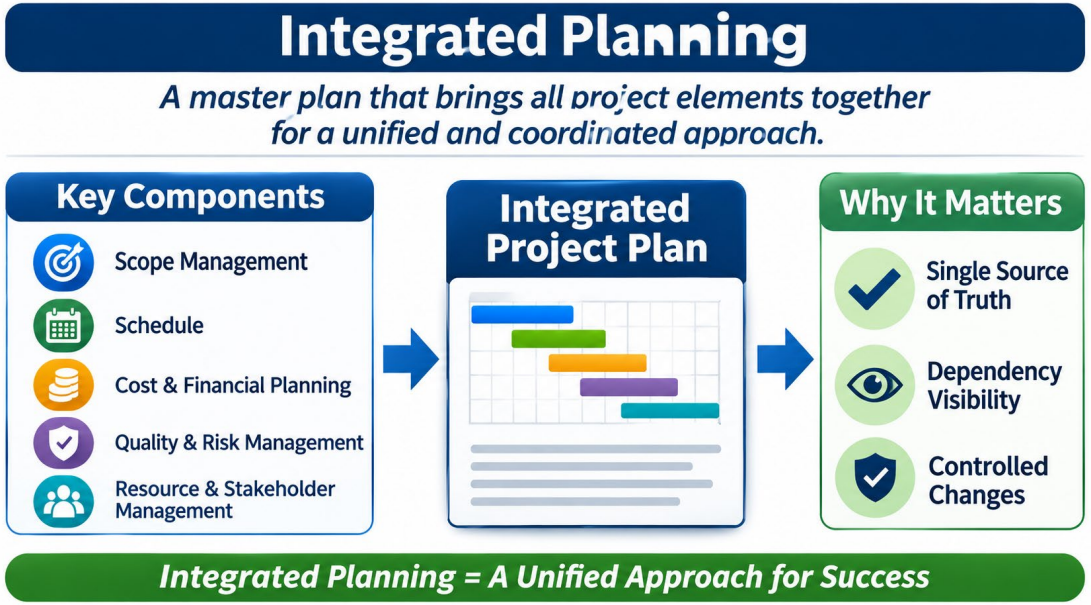


What Is an Integrated Project Plan?

Connects customer and end-user needs to a governed scope baseline, integrated schedule, cost baseline, resourcing, risks, communications, quality, stakeholder engagement, controlled execution, formal acceptance, and sustained benefits.

Incorporate an AI-assisted schedule recovery playbook.

> **The central test of success is not "the team finished the work" — it is "the customers received, accepted, used, and benefited from the capabilities they actually needed."**



Comparing & Synthesizing Two Approaches

Recovery-Oriented Framework

- Start with execution slippage, root-cause diagnostics, and response
- Focus on schedule, flow, blockers, governance, and 30-day stabilization
- Closure check deliverables, handover, and benefits ownership
- Use AI diagnoses, forecasts, and draft decisions



IPP Perspective

- Start with elicitation, integrated planning, and baselines
- Coordinate scope, schedule, cost, resources, quality, risk, etc.
- Send customers what they requested using acceptance traceability
- Project leader to direct people, plans, deliverables, and track them all



Synthesis & Improvements

- Plan for delivering value using planned recovery if variance occurs
- Use one integrated control system with explicit trade-offs
- Validate fitness for use at every acceptance gate
- AI is an advisory capability; humans validate evidence/authorize change



Complex-Project Scenario

A multi-site customer-service platform modernization:

- Cloud-based infrastructure
- Data cleansing and migration
- Comprehensive security controls
- Customer portal features and dashboards
- Value-stream and employee workflow redesign
- Quantifiable operational transition
- Tiered support reports
- Additional customized solutions...



Planning Assumptions - Baseline at a Glance

12

Month Duration

Pilot release, transition, delivery
at 6, 10, 12-month

$2M

Authorized Budget

Full delivery total funding

M8

Formal Closure

Simulated delay at month 8
Diagnosis to verify RCA

Scope includes the customer portal, workflow automation, integration, migration, security, training, and support.
Business outcomes: faster service resolution, higher satisfaction, less manual effort, and greater adoption.
All numerical targets require sponsor and customer validation.

Governance, Accountability & Decision Rights

Executive Sponsor

Business case, funding, strategic trade-offs, escalations, and formal closure

Project Leader

Integrated plan, baseline integrity, RAID, reporting, and recovery execution

Product Owner

Priorities, requirement clarification, incremental acceptance, and value ordering

Change Control Board

Approves controlled changes within assigned authority; baseline version control

Decision escalation flow: project team → project leader → change control body → sponsor → customer acceptance authority.

AI cannot authorize any of these decisions.

Supporting Governance Roles



Technical / Quality / Security Leads

Architecture, verification, security, technical readiness, etc.



Finance / Procurement

Cost baseline, actuals, forecasts, vendors, and financial closure



Operations / Service Owner

Operational readiness, support, acceptance, performance, transition, adoption, improvements



Benefits Owner

Post-launch KPIs, benefits-realization, ongoing decisions

Requirements Elicitation & Customer-Value Definition

1. Identify & Register Stakeholders
2. Elicit Using All Techniques
3. Prioritize & Define Acceptance Criteria
4. Baseline & Maintain Traceability



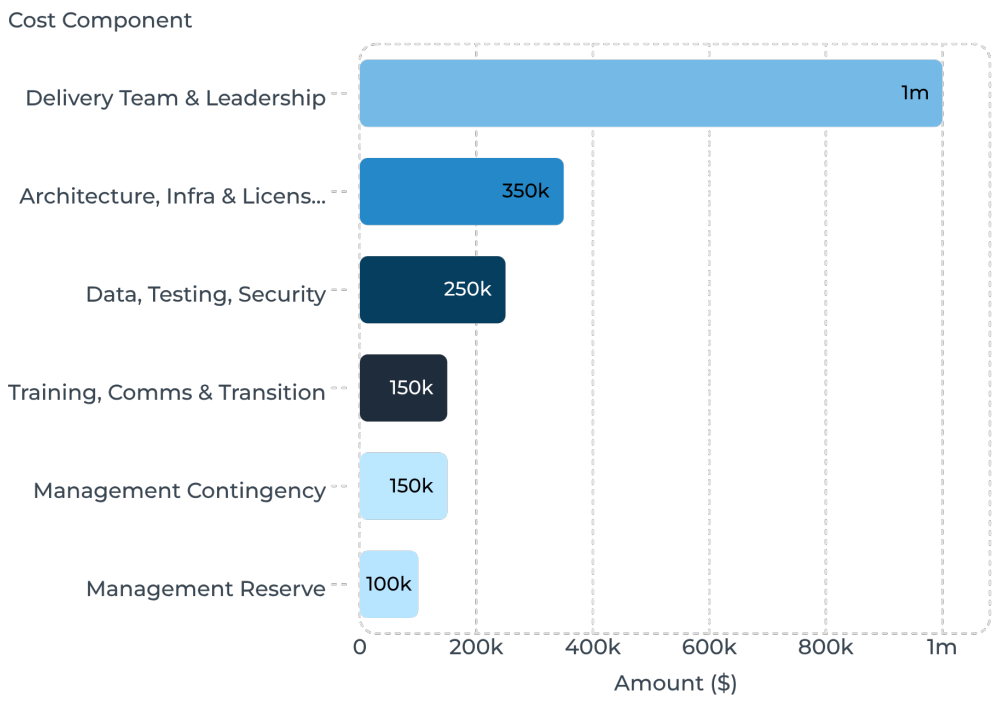
Requirements-to-Value Traceability

Requirement	Deliverable / Test	Customer Acceptance Evidence	Value Measure
R-01 Submit & track requests	Capability; end-to-end UAT	Customer journeys/approved UAT	Digital self-service adoption
R-02 Staff resolve efficiently	Workflow; process simulation	Operational scenario tests sign-off	Median resolution time
R-03 Data remains protected	Access controls and migration	Security assessment/reconciled data	Zero unresolved critical issue
R-04 Teams to drive solution	Training and support handover	Readiness; service-owner acceptance	Training & incident response

Scope Baseline & Integrated Deliverables

WBS	Work Package	Major Deliverables
1.0	Discovery & Requirements	Stakeholder map, requirements specs, value-stream maps, acceptance matrix
2.0	Architecture & Foundation	Architecture decision record, integration bonds, security design
3.0	Build & Configure	Portal increments, workflow capabilities, UI/UX, interfaces, technical records
4.0	Data & Verification	Migration plan, reconciliations, automated tests, performance, security evidence
5.0	Deployment & Adoption	Pilot, production rollout, communications, training, support readiness, fall-back
6.0	Closure & Benefits	Approvals, financial closure, lessons learned, ownership, support roadmap

Resource & Cost Baselines



Cost Performance Baseline

$1,900,000 — performance baseline, plus known contingency.

$100,000 — management reserve (sponsor authorization).

Validate reserve treatment, logistics, indirect costs, taxes, vendor commitments, and cash-flow phasing under the organization's financial policy. Confirm capacity against the integrated schedule before baseline approval.

Integrated Subsidiary Management Plans

- Quality
- Risk
- Change
- Communications
- Stakeholders
- Procurement
- Data / Security / Compliance
- Knowledge & Transition

Execution Model: Predictive Governance + Iterative Delivery

Translate & Sequence

Accepted work packages → increments & sprint/releases ←→ deliverables/value

Run Integrated Cadences

Daily impediment tracking, iterative planning/reviews/dependencies
Weekly milestone forecasts, monthly sponsor governance, satisfaction metrics

Validate Early & Control Changes

Use demos/feedbacks to validate value early; record changes (not scope authorization.

Monitor in One Dashboard

Cost, schedule, quality, risks, resource utilization, supplier commitments, stakeholder sentiment — all in one integrated view with objective evidence.



Schedule Delay Intervention: 30-Day Recovery Plan

1

Days 1–5: Diagnosis

Freeze data and reconcile baseline and forecast.
Analyze critical path, WIP, blockers, defects, and dependencies.

2

Days 6–10: Model Options

Re-sequence, phase value-critical scope, or target acceleration.
Evaluate cost, schedule, quality, and sponsor/change authorization.

3

Days 11–20: Execute

Fulfill accepted actions, WIP, clear interfaces, protect skills, increase integration verification, measure flow, defects, forecast, and costs.

4

Days 21–30: Assure

Challenge the reforecast, assess residual risk, update the IPP, commitments, recovery assurance, and authorize the next stage.



Customer Acceptance: The Moment of Truth

- Acceptance must not be inferred from silence, product demonstrations, sprint completion, or absence of reported defects. Document any conditional acceptance, open items, warranties, remediation owners, and due dates.

Outcomes & Stakeholder Value Scorecard



End Customers

25% reduction in median resolution time; customer service analytics at 90 days post-launch



Customer Operations

99.9% agreed availability; tracked via incident and SLA reporting



End Users / Employees

30% reduction in manual processing time; verified by time-and-motion sample



Sponsor / Investors

Benefits vs. approved business case; certified ROI/NPV at defined intervals

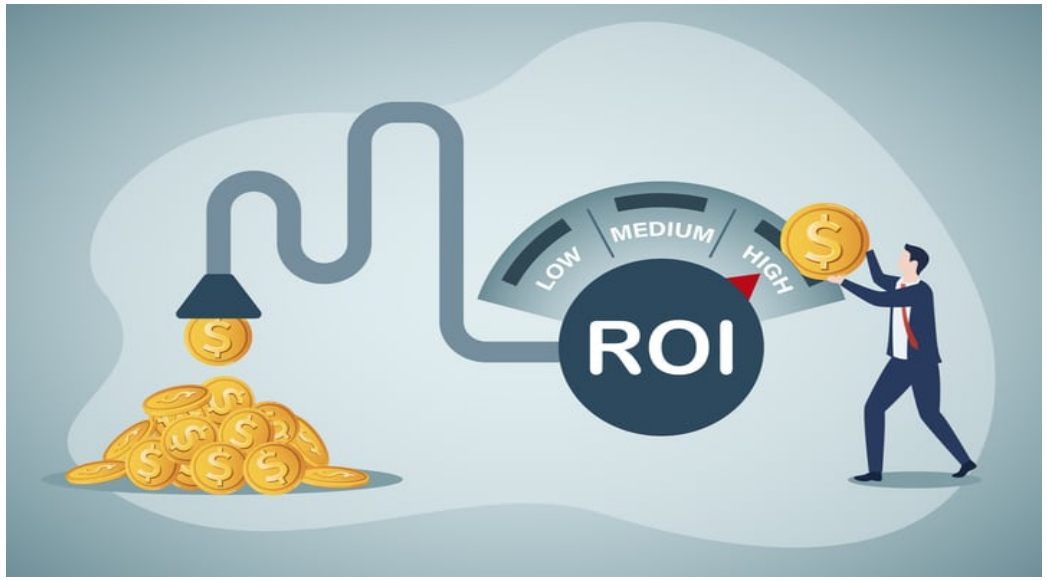


Measuring Real Value

ROI Formula

$$ROI = \frac{(\text{Realized Benefits} - \text{Total Investment})}{\text{Total Investment}} \times 100\%$$

Use a consistent period and cost treatment. For longer perspectives, assess NPV and benefit sensitivity.



Outputs vs. Outcomes vs. Impacts: outputs are deliverables; **outcomes** are changes in behavior and performance; and **impacts** are financial and strategic value.

Closure & Benefits-Realization Handoff

01

Formal Acceptance

Obtain customer acceptance for all contractually required deliverables or approved exceptions.

02

Reconcile Financials

Reconcile scope, baselines, change orders, actual costs, commitments, invoices, and contractual closeout.

03

Transfer Knowledge

Transfer operating procedures, architecture, licenses, training records, incident processes, support ownership, and warranties.

04

Disposition Open Items

Disposition every open defect, risk, issue, and action; assign residual ownership and acceptance of exposure.

05

Assign Benefits Owners

Assign KPI definitions, baseline values, data sources, targets, and 30/90/180-day review dates.

06

Authorize Closure

Secure sponsor authorization for administrative project closure; continue benefits monitoring under operational governance.

AI-Enabled Leadership Support & Safeguards

Requirements Extraction

AI: Extract requirements and draft traceability

Human: PO verifies intent, priority, and acceptance criteria

Schedule & Baseline Checks

AI: Check baseline consistency and schedule logic

Human: PM validates charts, dependencies, and progress

Risk & Recovery Analysis

AI: Analyze risks, blockers, flow, and recovery scenarios

Human: PM validates causes, assumptions, and impacts

Executive Communications

AI: Draft executive status, briefs, and stakeholder messages

Human: Liable owner checks accuracy, discretion, and suitability

AI Is Advisory — Humans Authorize



Core Safeguard Principle

AI assists with analysis, drafting, and pattern recognition, not decisions, approvals, deliverables, or contractual obligations.

Humans must audit evidence and benefits with the customer, sponsor, finance, and service owners.

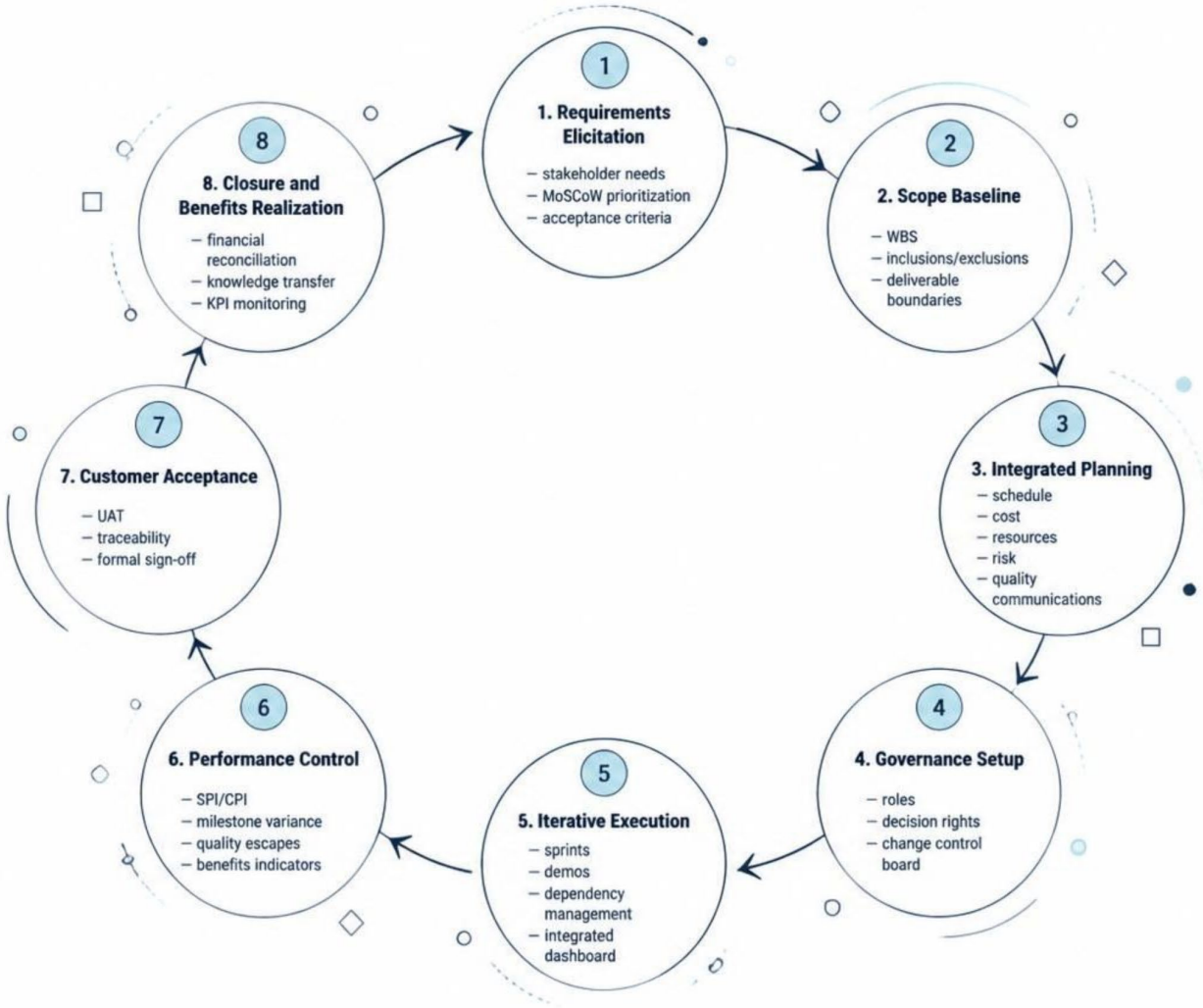
Key Principle:
One Integrated Control System

Scope, schedule, cost, resources, quality, risk, and communications are all governed together, with explicit trade-offs and human-authorized decisions at every gate.



The IPP Lifecycle from 5,000 feet!





Key Takeaways: What Makes an IPP Succeed

Value Is the True North

Success means customers received, accepted, used, and benefited from the capabilities they needed — not what the team delivered.

Integration Is Non-Negotiable

Scope, schedule, cost, risk, quality, and communications must be managed as one system with explicit trade-offs — not in silos.

Humans Authorize, AI Advises

AI accelerates analysis and drafting, but every decision (i.e. baseline, changes, acceptance) requires human validation and authority.

Evidence-Based Acceptance

Acceptance must be based on traceable test evidence and authorized sign-off — never inferred from silence, demos, or sprint completion.

Delivering Value That Lasts

Plan with Rigor

Baseline scope, schedule, cost, and quality before execution begins

Execute with Evidence

Monitor, control, and recover using objective data and authorized decisions

Close with Accountability

Formal acceptance, financial reconciliation, and benefits ownership transfer

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