



Overview of Workshop Offering: Project Planning Workshop

Outsourcing Support Services (OSS)

Project Planning Workshop | Overview

Purpose: To review, enhance, and validate the project plan

Agenda

- Introductions and background
- Review and refine project plan
- Ensure alignment of plan to approval and decision-making processes
- Identify open issues and action items

5-6 hours of joint problem-solving and planning

Additional details and timing on following page

Objectives

- Identify missing activities or risks
- Recommend areas for improvement or identify issues to be further considered
- Clarify critical milestones, timing, and responsibilities

Typical participants

- Core team leader
- Project manager
- Sourcing lead
- Legal
- HR
- Other members of core project team

Everest inputs

- Review the draft project plans
- Provide insights for client to consider and suggest approaches to resolve open issues
- Facilitate workshop

Client preparation

- Prepare the project plan
- Schedule the workshop and the attendees

Agenda item	Time allocation
<p>Introductions and background</p> <ul style="list-style-type: none"> ■ Objectives of initiative ■ Scope of initiative ■ Confirm understanding of draft project plan (provided in advance to Everest for review) 	1 hour
<p>Review and refine project plan</p> <ul style="list-style-type: none"> ■ Refine milestones, required tasks, and responsibilities ■ Identify key interdependencies ■ Problem-solve closing any gaps or sequencing issues ■ Pressure-test for risk areas and how to mitigate ■ Adjust project plan 	3 hours
<p>Ensure alignment of plan to approval and decision-making processes</p> <ul style="list-style-type: none"> ■ Business, legal, financial, and other approvals (e.g., audit, HR) ■ Standard procurement and project management processes ■ Supplier's internal review/approval timing 	1 hour
<p>Identify open issues and action items</p> <ul style="list-style-type: none"> ■ Assign action items ■ Determine target dates 	0.5 hour

Client

- Develop draft project plan, including milestones, timing, responsibilities, and dependencies
- Bring following items to the workshop
 - Objectives and scope of initiative
 - Draft project plan (if possible, provide to Everest 2 days in advance of workshop)
 - Standard procurement process (if applicable)
- Complete draft project responsibility matrix
- Invite appropriate meeting participants
- Secure logistics for meeting (room, audio-visual, etc.)

Everest

- Provide and discuss in advance of workshop
 - Standard project plan (if required)
 - Draft project responsibility matrix
- Review project plan in advance of workshop
- Confirm logistics of workshop
- Bring following items to the workshop
 - Outsourcing project planning best practices and pitfalls
 - Comments on draft work plan

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