Project Management Playbook

Description

In partnership with senior project management leadership at a health plan software-as-a-service (SaaS) company, I developed a project management playbook, a client-facing companion playbook, and supporting training materials for software implementations.

Goal

The goal was to equip the Project Management Office (PMO) with consistent processes, practical tools, clear documentation, and effective training. Together, these resources were designed to align project teams, strengthen client engagement, and reduce project delays and client frustration.

Approach

I interviewed project management professionals at multiple levels to understand their existing processes and pain points, and I reviewed client feedback to identify recurring themes. The analysis revealed inconsistent project implementation and tracking practices. In response, I recommended a standardized project management approach supported by job aids that would help project managers engage clients consistently throughout each project phase.

Working with a Certified Project Manager, I created a full-cycle project management playbook that documented each project step, the required materials for every phase, and the expected client interactions. I also developed a client-facing companion playbook aligned with the project manager's guide. It clarified the client's responsibilities, explained what clients could expect from their project manager before, during, and after each phase, and provided a resource for new-client onboarding.

To support adoption, I trained the project team managers on the new processes and documentation, preparing them to deliver the training to their own teams.

Results

By the project's conclusion, I delivered a 79-page project management playbook and a client-facing companion aligned with the client's workflow. I also added and linked all required documentation in the client's Jira repository and conducted train-the-trainer sessions with project team leads, giving the client the resources and guidance needed to implement the new playbooks.



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1 INTRODUCTION

1.1 TARGET AUDIENCE

This Playbook was created to assist project managers by providing a sequence of implementation events and checklist of tasks that project managers need in order to effectively and consistently implement projects. This Playbook assumes the reader has a general understanding of project management.

1.2 OBJECTIVE

To provide standardized project management processes for implementation projects.

1.3 GOVERNANCE

Revisions of this Playbook will be governed by the Project Management Office (PMO). To request revisions to the Playbook, please contact the PMO Director.

2 HOW TO USE THE PLAYBOOK

2.1 PLAYBOOK ORGANIZATION AND CONTENTS

Each project management phase within this Playbook contains three sections.

- **Description** – Provides an overview of the project management phases and its associated activities

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5 INITIATION

5.1 INITIATION PHASE

This is the start of the project, and the goal of this phase is to define the project at a broad level. This phase usually begins with a signed contract (MSA).

5.2 MONITOR AND CONTROL DOCUMENTATION

The documents required for the Initiation Phase are listed below. (Appendix A – Master Artifact List, contains a brief description of each document.)

Place a check next to the artifact once you have customized the artifact for the client and moved it to the destination folder indicated in the table below.

✓	Title	Type	Required	Destination Project Folder
	I01.0 SOW	W	Y	Phase 1 - Initiation
	I01.1 SOW Financials	X	Y	Phase 1 - Initiation
	I02.0 Project Charter	W	Y	Phase 1 - Initiation
	I03.0 Sales to Services Transition Checklist	W	Y	Phase 1 - Initiation
	I03.1 Sales to Service Transition Presentation	P	Y	Phase 1 - Initiation
	P12.0 Issue Management Plan	W	Y	Phase 2 - Planning

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