



Project Management For Warehouse Projects

2 Day – Training Delivery Content



A comprehensive practical training content equipping warehouse and operations professionals with **structured project management tools and frameworks**, built specifically for the warehouse environment.

For Project Management Professionals

ICARIANS

DESIGNED & DEVELOPED FOR

- Project Management Professionals
- Master PM Trainers
- **Organizational Development Coaches**
- HR, L&D, Warehouse Professionals
- PMI certified professionals and Trainers
- New and Aspiring PM Trainers

2 DAY PRE-DESIGNED PROGRAM

WITH TRAINER'S NOTES FOR EACH SLIDE

Let's Look inside the Collection





This Pre-Designed Content holds 16 Folders



**And Each Folder holds
specific Files**



Content Details -

1. Detailed Learning Guide

14 page learning guide.

2. Detailed Trainer's Guide

40+ page detailed Trainer's Guide

3. Training Agenda, Brochure & Proposal

4 detailed PDFs to present and plan your training.

4. Day 1 - Program PPT

40+ Slide PPT for Day 1

5. Day 2 - Program PPT

40+ Slides PPT Day 2

6. Trainer's Notes for Each Slide - Day 1

Day 1 Trainer's Notes for each Slide

7. Trainer's Notes for Each Slide - Day 2

Day 2 Trainer's Notes for each slide

8. Case Studies

5 Detailed Case Studies

9. Practice Worksheets

6 Practical Worksheets

10. Simulation Activities

5 Simulation Activities

11. Group Discussion Activities

6 Group Discussion Activities

12. Pre and Post Training Assessments

Pre and Post Training Assessments Sheets

13. Trainer's Handbook

Trainer's Handbook for a quick guidance

14. Participant Handbook

Participant Handbook to guide participants

15. Tools and Templates

20+ Tools and Templates in 5 Categories

16. Capstone Project

Detailed Capstone Project

Let's Look at some Screenshots



Of the Content



PROJECT MANAGEMENT FOR

Warehouse Projects

Foundations & Structured Planning

Intermediate Level · Physical Classroom Training

DAY 1 OF 2

TODAY'S 7 MODULES

M1 Warehouse Project Lifecycle

M2 Scope & Change Control

M3 Communication & Stakeholders

M4 Scheduling & Resources

M5 Budget & Cashflow

M6 Risk Identification

7

Modules

75 min

Planning Workshop

6

Case Studies

10+

Templates

DAY 1 OVERVIEW

Day 1 Schedule At a Glance

Foundations & Structured Planning · 9:00 AM – 5:00 PM			
09:00 – 09:30	M1	Warehouse Project Lifecycle	Lifecycle mapping activity · Identify where projects fail
09:30 – 10:30	M2	Scope Definition & Change Control	Scope statement · Case study · Change request process
10:30 --- Morning Break (15 min)			
10:45 – 11:30	M3	Communication & Stakeholder Management	RACI Matrix · Communication Plan · Escalation flowchart
11:30 – 13:00	M4	Scheduling & Resource Planning	WBS build · Gantt Chart · Resource allocation · Peer review
13:00 --- Lunch Break (60 min)			
14:00 – 15:00	M5	Budget & Cashflow Awareness	Budget structure · Payment milestones · Vendor case study
15:00 – 16:00			

MODULE 3
RACI

The RACI Matrix — Who Does What

The most powerful tool for eliminating accountability gaps on warehouse projects.

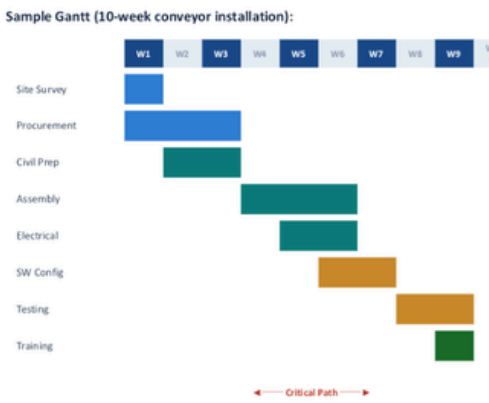
R	Responsible <i>Every task needs at least one R.</i>	The person who actually does the work or completes the task. There can be multiple R's per task.
A	Accountable <i>Only ONE per task — ever.</i>	The single person who owns the outcome and signs off. There should be EXACTLY ONE A per task.
C	Consulted <i>Consult where expertise matters.</i>	People whose input is sought before decisions are made. Two-way communication. Slows decisions — use sparingly.
I	Informed <i>Inform — don't consult unnecessarily.</i>	People kept updated on progress. One-way communication. Not decision-makers. Use for senior stakeholders.

MODULE 4
Gantt Chart

The Gantt Chart — Building a Project Timeline

Translate your WBS into a visual schedule with dependencies and a critical path.

Key Gantt Chart Components	
Task List	Every work package from the WBS becomes a row. Tasks must be named and owned.
Duration	Estimate in working days. Validate with the person who will do the work — not just the PM.
Dependencies	Finish-to-Start (FS) — most common. Start-to-Start (SS), Finish-to-Finish (FF). Sequence matters.
Critical Path	The longest chain of dependent tasks. Any delay here delays the entire project end date.
Milestones	Zero-duration markers for key gates: site ready, installation complete, testing passed, go-live.
Resources	Name the person (not just the role) responsible for each task. Check for over-allocation.



Advanced Level PPTs

MODULE 2
Change Control

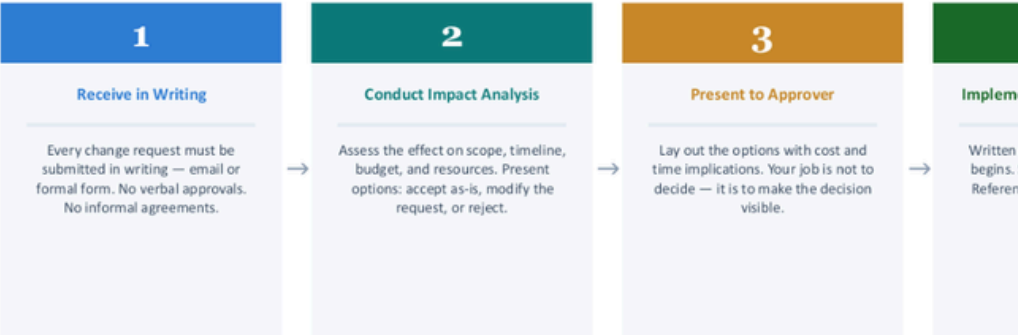
The Change Control Process

'No change is small. Every undocumented change is a future dispute.'

Why Change Control Exists

Change requests are not failures of planning — they are a normal feature of complex projects. The problem is not the change. The problem is the change. A formally managed change that takes 2 extra days is better than an informally agreed change that derails the budget.

The 4-Step Process:



MODULE 4
11:30 – 13:00

Scheduling & Resource Planning — WBS

'If it's not on the WBS, it won't be in the schedule — and it won't get done.'

What Is a Work Breakdown Structure (WBS)?

A hierarchical decomposition of the total project scope into smaller, manageable tasks and deliverables. It is the backbone of the project schedule.

3-Level WBS — Racking Installation Example



WBS BEST PRACTICES

- Start at Level 2 (phases) — never jump straight to tasks
- Each work package should be completable in 1–2 weeks
- Assign an owner to every work package before it goes to the Gantt

WATCH OUT

Groups often create a task list that jumps straight from the project title to individual steps — missing the phase level entirely. Point this out during the peer review. A good WBS has exactly 3 levels: project, phases, work packages.

LUNCH BREAK

13:00 – 14:00 · 60 minutes

After lunch — the afternoon agenda:

14:00	M5	Budget & Cashflow Awareness
15:00	M6	Risk Identification & Mitigation
15:30		Tea Break (15 min)
15:45	M7	Planning Workshop — Integration (75 min)
17:00		Day 1 Close

Day 1 Tools & Templates Summary

Every participant completes these templates during Day 1 workshops — ready to use on their next project.

M1 Lifecycle Flowchart Used in icebreaker mapping activity	M2 Scope Statement Template Completed individually — objectives, deliverables, inclusions, exclusions, acceptance	M2 Change Request Form Introduced in Module 2, applied in Module 3
M3 RACI Matrix Completed in case study — one A per task. No accountability gaps.	M3 Communication Plan Template Meeting cadence, responsibilities, escalation path	M3 Escalation Flowchart 4-level path: Team → PM → Senior Mgmt → Executive
M4 WBS Template (A3) 3-level hierarchy built in scheduling activity	M4 Gantt Chart (Excel) Built in scheduling activity — with dependencies and critical path	M4 Resource Allocation Sheet Named individuals, tasks, over-allocation of resources
M5 Budget Awareness Checklist 10 financial risk flags — referenced in case study debrief	M6 Risk Register Completed live in Module 6 with 3 real risks from participants' projects	M7 Integrated Project Plan Combines all above into a single cohesive project plan — produced in Planning Workshop

Day 1 - 3

Pre-Programme Preparation Checklist

Complete this before every delivery. No shortcuts.

4 Weeks Before	1 Week Before
☐ Confirm participant list, job roles, and industries	☐ Dry run of Modules 4 and 7 (highest complexity and timing risk)
☐ Tailor case studies and examples to match participant backgrounds if possible	☐ These are the most activity-heavy modules — timing discipline is critical
3 Weeks Before	Day Before
☐ Review all module content and tools; practise any you are less familiar with	☐ Visit venue; set up room; check all equipment; lay out materials
☐ Pay special attention to Excel tools — Gantt Chart and Dashboard	☐ Room setup takes longer than expected — allow 90 minutes minimum
2 Weeks Before	Morning of Day 1
☐ Prepare and print all participant materials; test all technology	☐ Arrive 60 minutes before start; re-check setup; brief any co-facilitator
☐ Print extras — always bring 10% more materials than participants expected	☐ Participants often arrive early — being in the room early creates a welcoming environment

Designed with Creativity and Elegance

Planning Workshop — Integration

This is the capstone of Day 1. Everything else has been preparation for this.

WHAT PARTICIPANTS BUILD:

☐ Scope Statement	Objectives + Deliverables + Exclusions
☐ Work Breakdown Structure	Phases + Work Packages (3 levels)
☐ Gantt Chart	Key milestones + critical path marked
☐ Resource Allocation	Who does what, when?
☐ Risk Register	Top 5 risks with mitigation and owners
☐ RACI Matrix	For key project roles

TIMING:

0–5 min	Read scenario aloud
5–45 min	Groups build deliverables
45–70 min	Gallery walk

Day 1 - 3

Monitoring & Control

"If someone asks you right now — is your project on track? — what do you say?"

The goal of this module: make that question answerable with a number and a date.

The Three Monitoring Dimensions

Schedule Performance Monday 17 KPI: Schedule Variance (SV) Target: 0 days variance Trigger: 2+ days behind on critical path Example: Planned: 5 tasks. Actual: 3 complete. SV = -2 tasks.	Cost Performance \$ KPI: Cost Variance (CV) Target: Within 5% of budget Trigger: Spend >10% ahead of progress Example: Budget W6: \$150K. Actual spend: \$162K. CV = -\$12K.	Quality Performance Quality KPI: Open Defects Target: Zero P1 defects Trigger: Any P1 defect or >3 open P2 Example: 2 open defects from testing. 1 is P1 (installation fault).
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Day 2 - 10 of 50

Handover Checklist — What Gets Transferred

Every item on this checklist must be transferred to the client/operator before the project is officially closed.

Six categories of handover documentation — all required:

Technical Documentation ☐ As-built drawings (updated to reflect actual installation) ☐ Equipment specifications and datasheets ☐ CAD files or BIM models (if applicable) ☐ Load test certificates and structural approvals	Operations & Manuals ☐ All equipment operation manuals (physical and digital) ☐ Maintenance schedules and service intervals ☐ Spare parts lists with part numbers ☐ Vendor contact list for service calls	Safety & Compliance ☐ Safety inspection certificates (racking, fire, electrical) ☐ Hazardous materials data sheets (if applicable) ☐ Regulatory approval documents ☐ Risk assessments for installed equipment
IT & Systems ☐ WMS system credentials and access permissions ☐ Software licences and version documentation ☐ Backup and recovery procedures ☐ IT support contact details and SLA	Training Records ☐ Staff training attendance records ☐ Training completion certificates ☐ Signed SOP acknowledgement forms ☐ Operator competency assessments	Commercial & Legal ☐ Final signed contracts and variation orders ☐ Warranty certificates (equipment, installation) ☐ Insurance certificates from contractors ☐ Final project accounts and payment records

Project Dashboard — RAG Status & KPI Tracking

Walk through the Excel dashboard on screen. Build it live — don't just show a finished example.

Dashboard Components — What Goes In:

RAG Status Red / Amber / Green for each dimension. One look tells the full story. Updated weekly.	Schedule Variance Planned tasks vs. actual completed. Days ahead / behind on critical path. Trend arrow.	Cost Variance Budget vs. actual spend. Forecast to complete. Contingency remaining percentage.	Quality / Open Defects Open defect count by priority. Time-to-resolve trend. Testing pass rate.
Top Risks Top 3 active risks from Risk Register. Status change since last update. Any new P1 risks.	Open Issues Count of open issues. Oldest unresolved issue. Issues closed this week.	Upcoming Milestones Monday 17 Next 3 milestones. On track / at risk flag. Days until each milestone.	Actions Due Actions from last status call. Owner. Due date. Done / Not done.

DASHBOARD BEST PRACTICES

Update every Monday before 9am — not when the sponsor asks.
One page only — if it doesn't fit on one page, it's not a dashboard, it's a report.
RAG status is a judgement call — not just the maths. Context matters.
Shared with the whole team — not just management. Transparency prevents surprises.

Page 9 - 11 of 50

Client Acceptance Form & Formal Sign-Off

"Without a signed acceptance form, the project is never officially over — and neither is your liability."

What the Client Acceptance Form Contains:

Project Title & Reference	Full project name, PO number, and contract reference
Scope Summary	Brief statement of what was delivered against what was contracted
Punch List Status	Confirmation that all P1 items are resolved; P2/P3 items listed with agreed dates
Documentation Received	Checklist confirming all 6 handover categories received and verified
Outstanding Items	Any deferred items formally agreed and documented with owners and dates
Client Sign-Off	Authorised client signatory name, title, signature, and date
Contractor Sign-Off	Project Manager name, title, signature, and date of handover

CRITICAL RULE

Sign the Client Acceptance Form only AFTER:
① All P1 punch list items resolved ② All documentation received and verified ③ Client walkthrough completed ④ Authorised signatory (not just any manager) present

HANDOVER SEQUENCE

1. Punch list reviewed — all P1 items closed
2. Final walkthrough with client on site
3. Handover Checklist reviewed item-by-item
4. Documentation package handed over
5. Acceptance Form signed by both parties
6. Project officially closed in system
7. Lessons Learned session scheduled

Capstone Project

Apply every tool from both days to one complex scenario.

This is NOT a test. It is an INTEGRATOR.

WHAT GROUPS PRODUCE:

- ☐ Scope Statement (with explicit exclusions)
- ☐ Work Breakdown Structure (3 levels)
- ☐ Gantt Chart (milestones + critical path)
- ☐ Risk Register (6+ risks including complications)
- ☐ Stakeholder Map + RACI Matrix
- ☐ Communication Plan + Escalation Flowchart
- ☐ Change Request with Impact Analysis
- ☐ Project Dashboard (Week 4 status)
- ☐ Handover Chart (for handover to client)

THE CAPSTONE PROJECT

Meridian Logistics

New Automated Fulfilment Centre

Facility	12,000 sqm
Timeline	14 weeks
Scope	7 major elements
Complications	3 (revealed live)

Day 2 - 26 of 50

15:45 – 17:00 · 75 minutes (60 min build + 15 min presentations)

DAY 2 TOOLKIT

Day 2 Tools & Templates Summary

III tools introduced and practised on Day 2 — ready to apply from next week.

15:45	Resume and set expectations	'You have 45 minutes to complete all deliverables. The standard is not perfection — it is structured under pressure. Show me your thinking, not a polished document.'	All tools introduced and practised on Day 2 — ready to apply from next week.					
15:50	Circulate and facilitate	Visit every group. Ask facilitative questions only: 'What did you decide about the critical path delay?' 'What did you decide about the critical path?' 'What are the options for Complication 2?'	M0	Site Readiness Checklist 5-category gate review. Complete 3 days before every vendor arrival.	M0	Vendor Coordination Log Track vendor commitments, deliveries, status, and required actions.	M0	Testing Checklist 4 test types: functional, load, integration, UAT. All must pass.
16:00	REVEAL Complication 2	Cold storage scope change request. Read aloud to all groups simultaneously. Groups should now have Change Request Form ready to use.	M0	Go-Live Readiness Checklist 8-item gate review. All ticked before commissioning begins.	M1	Project Dashboard (Excel) RAG status, schedule/cost variance, open issues, upcoming milestones.	M1	Issue Log Every issue: owner, severity, resolution action, due date.
16:15	REVEAL Complication 3	WMS engineer resignation. Read aloud to all groups. Watch for groups that have risk mitigation all in place from their Risk Register.	M1	5 Whys Template Iterative root cause drilling. Ask Why? five times.	M1	Fishbone Diagram 6 categories: People, Process, Equipment, Materials, Environment, Management.	M1	Corrective Action Tracker Root cause → fix → owner → due date → verification. Close the loop.
16:30	10-minute warning	'You have 10 minutes to finish. Focus on completing what you have — don't start anything new. Prepare 10-minute presentation: what decisions did you make, and why?'	M1	Change Request Form Receive in writing. Impact analysis. Present options. Written approval before any work.	M1	Impact Analysis Template Scope / time / cost / resource / risk impact. 3 options. Recommendation.	M1	Punch List Outstanding items: description, priority, owner, due date, sign-off.
16:45	Presentations — 4 min per group	One spokesperson per group. All group members contribute. Focus on: What key decisions did you make? What did you decide NOT to do? Which tool was most useful under pressure?	M1	Handover Checklist 6 documentation categories. All items received and verified before sign-off.	M1	Client Acceptance Form Formal ownership transfer. Both parties sign. Project officially closed.	M1	Personal Commitment Sheet 3 lessons + 3 improvements + 3 action by next Monday. Written commitment.

Complete Programme Architecture – Both Days

module connects to the overall PM lifecycle.



Nov 2 - 41 of 5

Lessons Learned & Action Commitments

This module *MUST NOT* be cut. It is where training converts into workplace change.

WHY THIS MATTERS:

Research in adult learning shows that transfer to the workplace is highest when participants make specific, time-bound commitments immediately after training — not abstract intentions to 'apply what I have learned'.

THREE OUTPUTS EACH PARTICIPANT PRODUCES:

3	Lessons Learned	Insights from the capstone and the two days
3	Workplace Improvements	Specific, actionable changes to advocate for
1	Action Next Week	A concrete first step with a self-set deadline

20 Minutes Never Negotiable

SESSION FLOW:

KPI Framework for Warehouse Projects

Suggested KPIs across the three monitoring dimensions — adapt to your project context.

Recommended KPIs by Dimension:

SCHEDULE	COST	QUALITY
Schedule Variance (SV) Target: 0 days ⚠️ ≥2 days behind on critical path	Cost Variance (CV) Target: Within ±5% ⚠️ Spend >10% ahead of progress	Open P1 Defects Target: 0 ⚠️ Any open P1 defect blocks go-live
Milestone Achievement Rate Target: 100% ⚠️ Any milestone missed without approved extension	Contingency Remaining Target: >50% at midpoint ⚠️ <25% contingency remaining at any point	Defect Resolution Time Target: P1 <48h, P2 <1wk ⚠️ Any P1 unresolved >48 hours
Tasks Completed on Time Target: ≥90% ⚠️ <80% completion rate in any week	Approved Variations Target: <10% of base contract ⚠️ undefined	Testing Pass Rate Target: ≥95% first pass ⚠️ <85% first pass rate requires investigation
Lookahead Accuracy Target: ≥85% ⚠️ <70% of forecast tasks started on planned date	Invoice Accuracy Target: 100% PO-matched ⚠️ Any invoice without matching PO/acceptance	Punch List Items at Handover Target: 0 P1, <5 P2 ⚠️ Any unsigned P1 item blocks acceptance

Day 2

Project Management for Warehouse Projects

A comprehensive 2-day practical programme specifically designed to equip warehouse and operations professionals with structured project management tools, frameworks, and execution skills.

Intermediate Level
1-5 Years Experience Recommended

Proposal, Manual, handbook

TABLE OF CONTENTS

1. Introduction	18. Day 2 Facilitation
2. Program Overview	19. Session Instructions
3. Training Objectives	20. Group Discussions
4. Target Audience	21. Simulation Activities
5. Learning Outcomes	22. Hands-On Workshops

PROJECT MANAGEMENT FOR WAREHOUSE PROJECTS

Intermediate Level Training Program Portfolio

Duration: 2 Days (09:00 - 17:20) | Format: Classroom / Interactive | Target: Warehouse & Operations Management

Course Overview

Modern warehouse projects are increasingly complex, involving high-tech automation, tight integration with WMS, and demanding timelines. This intermediate-level program bridges the gap between general project management and the specific logistical constraints of warehouse environments. Participants will master the tools required for expansion, relocation, and system implementation projects.

WELCOME TO THE PROGRAM

Warehouse projects today are becoming increasingly complex due to automation, technology integration, and operational continuity expectations. This handbook is your primary reference for mastering structured, professional execution of everything from racking installation to WMS implementation.

PROGRAM OBJECTIVES

- Define project scope effectively and manage changes professionally.
- Develop Work Breakdown Structures (WBS) and Gantt Charts.
- Identify and mitigate high-impact warehouse project risks.
- Coordinate multiple vendors and stakeholders seamlessly.
- Execute successful project handovers and operational readiness checks.

AGENDA OVERVIEW

Module	Core Topic
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PARTICIPANT PROFILE

Who Should Attend?

This programme is designed for a broad cross-functional audience involved in warehouse-related projects. The richest learning happens when mixed groups attend together.



Warehouse & Operations

- Warehouse Supervisors
- Warehouse Managers
- Logistics Executives
- DC Supervisors
- Inventory Managers



Project & Technical

- Project Executives
- Project Coordinators
- Engineers
- Site Supervisors
- Facilities Executives



Management

- Operations Managers
- Supply Chain
- Department Heads
- Involved Stakeholders

Recommended Experience: 1 to 5 years in warehouse, logistics, operations, engineering, or project-PM qualification required.

WHAT YOU WILL ACHIEVE

Learning Outcomes

Outcomes are measured across three domains — what participants know, what they can do, and how they behave on the job.

Day 1 — Slide-by-Slide Delivery Guide

Project Management for Warehouse Projects · Intermediate Level
Foundations & Structured Planning · 40 Slides · 7 Modules

Field	Detail
Programme	Project Management for Warehouse Projects – Day 1
Document	Slide-by-Slide Trainer's Script & Delivery Notes
Audience	Certified programme trainers and co-facilitators
Coverage	All 40 slides — exact scripts, actions, questions, timing
Classification	CONFIDENTIAL – FOR TRAINER USE ONLY
Version	Day 1 Edition

HOW TO USE THIS DOCUMENT

This document provides word-for-word scripts, step-by-step actions, timing guidance, discussion questions, and debrief frameworks for every one of the 40 Day 1 slides. Each slide section is clearly headed with the slide number, title, module, and time allocation. Read each section before delivery and practise the scripts until they feel natural — not rehearsed.

 **TRAINER SAYS** — Suggested verbatim or near-verbatim language to use.  **TRAINER DOES** — Physical actions: what to write, point to, or distribute.

 **TRAINER TIP** — Facilitation advice from experienced deliverers.  **WATCH OUT** — Common failure points or timing risks to manage.

 **DISCUSSION PROMPT** — Exact questions to spark group discussion.  **KEY MESSAGE** — The one idea that must land before you move on.

CASE STUDY 4

 The Racking Installation Project That Created Major Safety Risks

Case Study Type: Safety Failure + Vendor Mismanagement + Poor Quality Control

Background

A third-party logistics (3PL) company winning a major contract urgently needed to increase storage anagement pushed for rapid completion to meet a finalized client inventory arrival date.

PURPOSE

This assessment measures learning improvement and practical application capability following the 2-day programme. Focus is placed on problem-solving readiness for your next workplace project.

Participant Instructions:

- Apply concepts and tools learned during the workshop.
- Time available: 45–60 minutes.
- Complete all sections honestly to benchmark your growth.

SECTION A

Knowledge Confidence Review

CASE STUDY 1

 The Delayed Warehouse Racking Installation Project

Case Study Type: Project Delay + Vendor Coordination + Site Readiness Failure

1. Background

A leading FMCG company planned to expand its regional distribution warehouse to support

Case Studies, Guides & Activities

TRAINER'S GUIDE

FACILITATION & COACHING INSTRUCTIONS

FACILITATION TIPS

- **Encourage Real Examples:** Ask participants to share actual workplace situations.
- **Keep it Practical:** Avoid purely theoretical discussions.
- **Engage All:** Ask quiet participants: "What would you have done differently?"
- **Manage Time:** Ensure 5 minutes per group for final presentations.

Visual Flipchart Exercise

Create a live tally on a flipchart during the discussion to track frequency:

DELAY CAUSE	FREQUENCY MENTIONED
Vendor / Material Delay	
Scope Change / Mezzanine Requests	
Compliance / Safety requirements	
Resource allocation	

WORKSHOP TEMPLATE 2

GANTT CHART PLANNING WORKSHEET

OVERVIEW

Purpose of This Worksheet

This worksheet helps participants plan project timelines, sequence activities, identify dependencies, allocate responsibilities, and track progress effectively.

- Prevent scheduling conflicts and delays.
- Ideal for relocation, WMS implementation, racking, and automation projects.

Monitoring & Control

'If someone asks you right now — is your project on track? — what do you say?'

is module: make that question answerable with a number and a date.

Monitoring Dimensions

 July 17 Schedule Performance	 Cost Performance	 Quality Performance
Schedule Variance (SV) 0 days variance 2+ days behind on critical path Planned: 5 tasks. Actual: 3 complete. SV = -2 tasks.	KPI: Cost Variance (CV) Target: Within 5% of budget Trigger: Spend >10% ahead of progress Example: Budget W6: \$150K. Actual spend: \$162K. CV = -\$12K.	KPI: Open Defects Target: Zero P1 defects Trigger: Any P1 defect or > Example: 2 open defects from (installation fault).

SCOPE STATEMENT TEMPLATE

STRUCTURED TRAINING DELIVERY SYSTEM (STDS) FRAMEWORK ASSET

PROJECT INFORMATION

ITEM	DETAILS
Project Name	
Project ID	
Client / Organization	
Project Sponsor	
Project Manager	
Department / Business Unit	
Date Prepared	
Version Number	
Approval Status	

1. PROJECT OVERVIEW

Purpose of the Project

Describe why the project is being initiated and the business need it addresses.

Example: Implement a centralized project tracking system to improve reporting accuracy, team collaboration, and project visibility across departments.

COMPREHENSIVE ANALYSIS:
UNDERPAYMENT OF OVERTIME

Employment Act 1955 – 2022 Amendment | Case Study: Velocity Warehousing Sdn Bhd

The case of **Velocity Warehousing Sdn Bhd** represents a systemic failure in payroll governance. In Malaysia, the 2022 amendments to the Employment Act 1955 expanded protection to include any person under a contract of service, provided their

Workbook,
Worksheets and
Assessments

WORK BREAKDOWN STRUCTURE (WBS)
TEMPLATE

PROJECT EXECUTION & SCOPE MANAGEMENT FRAMEWORK

PROJECT INFORMATION

ITEM	DETAILS
Project Name	
Project Manager	
Department	
Project Sponsor	
Start Date	
Planned Completion Date	
Version Number	
Date Prepared	

PURPOSE OF THE WBS

The Work Breakdown Structure (WBS) helps project teams:

- Break large projects into smaller manageable tasks
- Improve planning and scheduling
- Assign responsibilities clearly
- Monitor project progress effectively
- Identify dependencies and risks
- Improve coordination between departments and vendors

The WBS is one of the most important project planning tools.

TRAINER HANDBOOK

Strategic Payroll Administration & Employment Act 2022 (Malaysia)

	A	B
1	Gantt Chart — Excel Based Template	
2		
3	WBS Code	Task Name
4	1.0	Project Kickoff
5	1.1	Scope Finalization
6	1.2	Site Survey
7	1.3	Layout Approval
8	2.0	Vendor Selection
9	2.1	Procurement Approval

PROGRAM PHILOSOPHY

This program is designed to transform participants from:

Payroll Processors → Payroll Controllers → Payroll Risk Managers

Focus Areas: Accuracy | Compliance | Risk Prevention | Audit Readiness

Tools and Templates

Project Name	
Client Name	
Project Manager	
Department	
Date Prepared	
Version No.	

MATRIX SCORING GUIDE

Probability Scale

SCORE	PROBABILITY LEVEL	DESCRIPTION
1	Very Low	Rare occurrence
2	Low	Unlikely
3	Medium	Possible
4	High	Likely
5	Very High	Almost certain

PROBABILITY × IMPACT MATRIX TEMPLATE

Risk Management Asset • Page 1

Impact Scale

SCORE	IMPACT LEVEL	DESCRIPTION
1	Negligible	Minimal disruption
2	Minor	Small operational impact
3	Moderate	Noticeable delay or issue

RISK REGISTER TEMPLATE

PROJECT RISK MANAGEMENT, ASSESSMENT & CONTROL TOOL

OSE

k Register is a structured tool used to identify, assess, monitor, and control project risks throughout t ifecycle.

plate helps project teams:

- entify potential project threats
- valuate probability and impact
- velop mitigation strategies
- assess success

SECTION 8 — VARIANCE ANALYSIS

BUDGET AREA	PLANNED AMOUNT	ACTUAL AMOUNT	VARIANCE	CORRECTIVE ACTION
Equipment	USD __ (RM __)	USD __ (RM __)		
Labor	USD __ (RM __)	USD __ (RM __)		
Vendor Services	USD __ (RM __)	USD __ (RM __)		
Logistics	USD __ (RM __)	USD __ (RM __)		

SECTION 9 — APPROVALS

ROLE	NAME	SIGNATURE	DATE
Prepared By			
Finance Representative			
Project Manager			
Department Head			

TRAINER INSTRUCTIONS

Workshop Objective

Participants will: Track project cash movement, Identify spending variances, Monitor vendor payment schedules, Forecast project cash requirements, and Improve financial visibility.

Suggested Activity

Provide participants with: A warehouse setup project scenario, Budget allocation details, Vendor payment schedules, and Procurement activities.

Participants must:

1. Populate the cashflow tracker
2. Identify cash shortages
3. Forecast future expenses
4. Recommend corrective actions

RACI MATRIX TEMPLATE

RESPONSIBILITY ASSIGNMENT & GOVERNANCE MATRIX

IRPOSE

he RACI Matrix is a responsibility assignment tool used to clearly define:

- Who is **Responsible** for completing a task
- Who is **Accountable** for final approval
- Who should be **Consulted** before decisions
- Who should be **Informed** about progress

is tool helps prevent: Confusion in roles, Communication gaps, Delays in approvals, Dupli ided responsibilities.

s extremely effective in warehouse projects involving: Multiple departments, Vendors a ms, Operations teams, Engineering teams, and External consultants.

RACI DEFINITIONS

CODE	MEANING	DESCRIPTION
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