



Project Governance Framework

Service Description

imc Learning Suite | Consulting Department | July 08, 2025

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1 Preface

The main target group of this service description are imc customers and their dedicated imc Project Managers / Business Consultants, but also other involved people for LMS implementation / rollout projects.

The purpose of this document is to provide a detailed description of **imc project governance framework of LMS implementation projects**. So, this document provides an overview of the project manager activities and deliverables during an implementation project.

The overall goal of the imc Consulting department is to offer professional services within projects, aligned with defined project management tasks. This service description is based on the **imc LMS Project Implementation Methodology** and offers more details regarding project management activities.

The project governance framework described in this document highly depends on the project size and customer expectations. To tailor to individual needs, imc defined global standards for project management activities that can be modified or extended depending on the complexity and customer expectation. The document also mentions optional project management activities (e.g., separate risk log, separate milestone plan, stakeholder meetings), activities of a higher frequency (e.g., project status calls, project status reports) or additional measures to mitigate project risks (e.g., project advisor, additional resources).

2 Project Roles & Raci Matrix

This section highlights the recommended project roles and responsibilities along with a RACI matrix, for LMS implementation projects.

2.1 imc Project Team

Here, we outline the different roles at imc involved in a Learning Management System (LMS) implementation project. This overview is based on the best practices established by imc, drawing from its extensive experience in deploying its LMS solution.

Role	Abbreviation	Role description
Project Manager	IMC-PM	<p>Each implementation project is assigned a Project Manager. The Project Manager is first responsible for the overall project planning, together with the customer's project manager. The Project Manager is thereafter responsible for day-to-day running of the project, and management of the scope, time, and budget. The Project Manager will also coordinate imc activities and involve relevant imc teams required as part of the project. The Project Manager is always the level 0 escalation point.</p> <p>Note: The role of the Project Manager and Business Consultant can be combined, based on the project size and complexity</p>
Business Consultant	IMC-BC	<p>The Business Consultant is the subject matter expert for LMS implementation tasks. The tasks include:</p> <ul style="list-style-type: none"> • Organising and managing requirements gathering workshops • Designing LMS workflows, based on requirements gathered during the workshop. • Specifying changes, where a change request has been ordered. • Configuration of the LMS • Training • UAT support <p>Note: Based on the project size and complexity, imc can assign multiple Business Consultants on a project.</p>
Consulting Team Lead / Head of Consulting	IMC-BC LEAD	<p>In general, imc is organised in regional Consulting Teams and each implementation project is assigned to the Team Lead (or Head of Consulting) of the team the Project Manager / Business Consultant is a member of. This person is not directly involved in the project work but takes on a monitoring role and works as a level 2 escalation point.</p>
Account Manager / Sales Representative	IMC-ACM	<p>The Sales Representative is only responsible for handing over the customer to the project team (sales handover / project initiation) and does not take any active role in the project, except in case of an escalation (e.g., to clarify the scope of a project). The Account</p>

		Manager will be responsible for all the commercial relationships and activities. These two roles might be covered by one person and might be involved in escalations
Project Advisor <i>(Optional)</i>	IMC-AD	For some projects, imc staffs a project with a Project Advisor: a very experienced Consultant (e.g., Senior, or Principal level) that supports the Project Manager / Business Consultant, and provides advice on project matters, supported with industry best practices. The Project Advisor acts as a level 1 escalation point. The Project Advisor is an optional project resource only available on larger implementation projects with higher business or technical complexity. Your project manager will indicate in the project organisation if imc has re-sourced a dedicated project advisor for you.
Technical Coordinator <i>(Optional)</i>	IMC-TC	For some projects, imc staffs a project with a Technical Coordinator. This individual is a technical specialist bringing technical expertise into the project. The Technical Coordinator is an optional resource only available on larger implementation projects with higher technical complexity. Your project manager will indicate in the project organisation if imc has resourced a dedicated technical coordinator for you.
Design Lead <i>(Optional)</i>	IMC-CD	For some projects, offering an extremely refined and customer-centric design, exceeding that of the standard adaptation. imc can provide this as an additional service in the form of a workshop where an experienced imc design lead is present to discuss requirements and practical solutions
imc Hosting	IMC-ECMT	imc hosting takes care of all hosting activities, including server and system installations, and system updates. imc generally does not define a single representative of this team during a project. Rather, your imc Business Consultant will coordinate any hosting activities with this internal team.
imc Support	IMC SUPPORT	imc support team is responsible for all support queries, after a customer's technical go-live.
Validation System Owner <i>(Only required in a validation project)</i>	IMC-VAL-OWNER	<p><i>This role only applies when a project requires validation</i></p> <p>The validation system owner is described as the person in the imc team who brings up changes to the imc validation lead. Typically, this is either an imc Business Consultant (for configuration changes in the LMS) or the imc Hosting team (whenever steps are required in the LMS installation process).</p>
Validation Lead <i>(Only required in a validation project)</i>	IMC-VAL-LEAD	<p><i>This role only applies when a project requires validation</i></p> <p>The validation lead is the imc responsible for:</p> <ul style="list-style-type: none"> • Evaluating if a change needs to be documents • Creating and maintaining IQ documents • Coordinating the people required for signatures where required.

2.2 Customer Project Team

Below is a list of recommended team members from the customer's side for an implementation project. It is crucial to identify the individuals responsible for relevant tasks within the project team and to ensure they have adequate time to fulfil their responsibilities. The composition of the team will vary based on specific project requirements and the size of the customer's team; however, the following roles have consistently demonstrated success across most projects.

Note: The 2 mandatory project roles recommended by imc for the success of a roll-out project. Individuals may also assume multiple project roles if necessary.

Role	Abbrevia- tion	Role description
Project Sponsor <i>(mandatory)</i>	C-SPONSOR	Responsible for ordering the project. The Project sponsor is also seen as an escalation point, for imc, during the project.
Project Manager <i>(mandatory)</i>	C-PM	Important for coordinating the presence of your own project team and managing communication with the imc Business Consultant and imc Project Manager
Technical/IT Specialist	C-TC	Responsible for collaborating on topics such as custom URLs, mailing, provisioning user data, SSO, data migration, etc.
Content Administrator	C-CONT-AD	Usually, a person or team responsible for managing (and creating) content in the LMS.
System Administrator	C-SYS-AD	Responsible for other administrative tasks in the entire system (user management, course bookings, etc.)
Test Lead	C-TEST-L	Responsible for coordinating UAT on customer's side.
Data Protection Officer	C-DPO	Responsible for drafting a privacy policy/terms of use, on customer's side.
Customer validation lead <i>(Only required in a validation project)</i>	CUST-VAL-LEAD	<i>This role only applies when a project requires validation</i> Responsible for validation activities on the customer side. This person is responsible to sign imc's IQ documents, if required in the customer's validation process.

2.3 RACI Matrix

The matrix is tabulated to illustrate who is **(R)**esponsible, **(A)**ccountable, **(C)**onsulted, or **(I)**nformed for each task. Tasks are arranged by the project phases recommended by imc in an LMS rollout project.

Phase	Tasks	(R)	(A)	(C)	(I)
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Understand & Plan	Create and maintain the project plan	IMC-PM	IMC-PM	C-PM IMC-BC IMC-AD	C-PM IMC-ACM
Understand & Plan	Create and maintain the risk log and change log	IMC-PM	IMC-PM	C-PM IMC-BC IMC-TC	C-PM
Understand & Plan	Define and agree project milestones	IMC-PM	IMC-PM	C-PM IMC-BC IMC-ACM IMC-AD	C-PM
Understand & Plan	Agree the overall communication strategy (project status call, emails, ticket system, file sharing) with customer's project manager	IMC-PM	IMC-PM	C-PM	CUST-PM IMC-BC IMC-TC
Understand & Plan	Run project Kick-off workshop	IMC-PM	IMC-PM	C-PM IMC-BC	C-PM IMC-ACM
Understand & Plan	Initiates & coordinates Technical Setup tasks	IMC-BC	IMC-PM	IMC-TC	
Design	Run Enabling Training Workshop	IMC-BC	IMC-PM	C-PM	C-PM C-CONT-AD C-SYS-AD C-TC
Design	Prepare and run Configuration Requirement Workshop	IMC-BC	IMC-PM	C-PM C-CONT-AD C-SYS-AD	C-PM C-CONT-AD C-SYS-AD
Design	Prepare and run Technical Workshop	IMC-TC	IMC-PM	C-PM C-TC IMC-BC	C-PM C-TC
Design	Prepare and run User Experience Design Workshop	IMC-CD	IMC-PM	C-PM C-C-AD C-SYS-AD	C-PM C-CONT-AD C-SYS-AD
Design	Write configuration workshop notes/Blueprints	IMC-BC	IMC-PM	IMC-TC	C-PM
Design	Write functional specifications for customisations and standard development	IMC-BC	IMC-PM	IMC-TC	C-PM
Design	Write User Experience Design workshop notes/Blueprints	IMC CD	IMC-PM	IMC-BC	C-PM
Design	Approve configuration and technical workshop notes/Blueprints	C-PM	C-PM	C-TC C-CONT-AD C-SYS-AD	IMC-PM

Develop and train	Configure LMS	IMC-BC	IMC-PM	IMC-AD	
Develop and train	Develop technical changes (e.g. SSO, customisations)	IMC-TC	IMC-PM	IMC-AD	
Develop and train	Implementing system design	IMC CD	IMC-PM	IMC-TC	
Develop and train	QA of configured LMS (including configuration changes, and customisations)	IMC-BC	IMC-PM	IMC-AD	
Develop and train	Tailor training slides for Based admin training	IMC-BC	IMC-PM		
Develop and train	Delivering training	IMC-BC	IMC-PM	C-CONT-AD C-SYS-AD C-PM	
Test	Prepare UAT scripts	C-TEST-L	C-PM	C-CONT-AD C-SYS-AD IMC-BC	C-PM IMC-PM
Test	Run Test Support Workshops	IMC-BC	IMC-PM	C-TEST-L C-CONT-AD C- SYS-AD IMC-BC	C-PM C-TEST-L IMC- PM
Test	Coordinate fixes (configuration and patch updates)	IMC-BC	IMC-PM	IMC-TC IMC-AD	C-PM C-TEST-L IMC- PM
Deploy	Agree technical go-live call	IMC-PM	IMC-PM	C-PM IMC-BC	C-PM
Deploy	Formal handover to imc Support Team meeting	IMC SUPPORT	IMC-PM	IMC-PM IMC-BC	C-PM IMC-ACM
Close	Coordinates, requests, and internally stores the official project closure sign-off document	IMC-PM	IMC-PM	C-PM IMC-BC	IMC-ACM
Close	Coordinates Sunset Meeting	IMC-PM	IMC-PM	C-PM IMC-ACM IMC-BC	
Close	Closes the main project implementation	IMC-PM	IMC-PM	C-PM IMC-BC IMC-TC	C-PM IMC-ACM IMC-AD
Regular activities	Monitor project scope, time, and budget	IMC-PM	IMC-PM	IMC-BC	C-PM
Regular activities	Update project ticket list and internal project reporting/documentation	IMC-BC	IMC-PM	IMC-BC IMC-TC	

Regular activities	Coordinates necessary delivery processes (patches, releases, customisations)	IMC-BC	IMC-PM	IMC-TC	C-PM
Regular activities	Inform when milestones are completed	IMC-BC	IMC-PM	IMC-AD	C-PM IMC-ACM
Regular activities	Weekly or bi-Weekly Project Status Call and written report	IMC-PM	IMC-PM	C-PM IMC-BC	IMC-ACM
Customer escalation	Level 0: Project Manager	IMC-PM	IMC-PM	IMC-BC IMC-TC	C-PM IMC-ACM
Customer escalation	Level 1: Project Advisor (optional)	IMC-AD	IMC-BC LEAD	IMC-PM IMC-BC IMC-TC	C-PM IMC-ACM
Customer escalation	Level 2: Consulting Team Lead / Head of Consulting	IMC-BC LEAD	IMC-BOARD	IMC-AD IMC-PM IMC-BC IMC-TC	C-PM IMC-ACM
Customer escalation	Level 3: imc Board member	IMC-BOARD	IMC-BOARD	IMC-BC LEAD IMC-AD IMC-PM IMC-BC IMC-TC	C-PM IMC-ACM
imc escalation	Level 0: Project Manager	C-PM	C-SPONSOR	C-TEST-L C-CONT-AD C-SYS-AD	IMC-PM C-SPONSOR
imc escalation	Level 1: Project Sponsor	C-SPONSOR	C-SPONSOR	C-PM C-TEST-L C-CONT-AD C-SYS-AD	C-SPONSOR IMC-PM
Validation	Create and maintain IQ documents	IMC-VAL-LEAD	IMC-VAL-OWNER	C-VAL-LEAD IMC-VAL-OWNER IMC-EMCT	C-PM C-VAL-LEAD
Validation	Run through IQ document (installation, patch updates)	IMC-EMCT	IMC-VAL-LEAD	C-VAL-LEAD	C-VAL-LEAD IMC-VAL-OWNER
Validation	Run through IQ document (configuration change)	IMC-BC	IMC-VAL-LEAD	C-VAL-LEAD	C-VAL-LEAD IMC-VAL-OWNER

2.4 imc Project Management Tools

Tool	Description
Project Plan	Based on the imc Project Implementation Methodology, the imc Project Manager is responsible for providing and managing the project plan. The project plan covers the project phases, work packages, and offers an up-to-date overview of the target project closure date. The project plan is updated by the imc Project Manager and is part of the regular Project Status Reports. The Project Plan is also one topic of the Project Status Calls. Depending on project size, duration, and complexity, imc uses the best appropriate software (e.g., Microsoft Excel, Microsoft Powerpoint, ProjectLibre or Microsoft Projects).
Project Minutes	For all workshops including Kick-Off, the imc Project Manager creates meeting notes that summarize results, open tasks, next dates, and other informative elements.
Project Status Calls	During the project phase, imc recommends having one regular (weekly) project status call. The status call is directed at the core project team on the customer and imc side. Topics of this call are the current project status report, the project plan, and project tasks.
Project Status Reports	The imc Project manager writes project status reports on a bi-weekly basis, including the current project status, project plan, completed tasks, upcoming tasks, identified risks, and general remarks. The project status is offered as a traffic light (green, yellow, red) indicating the project's time, budget, and scope.
Project Management Ticket Tool	During projects, imc uses Atlassian Jira as a project management ticket tool, to which the customer has access (see separate Customer Guide Jira Usage in Projects). Tickets can cover questions, potential issues, risks, coordination, and other project-related items. The project plan and project status reports can also be distributed via this tool. Please note that imc can only offer two named Jira accounts for each project.
Project File Share Tool	For document sharing (e.g., slides, status reports, project plans), imc uses the ticket tool (Jira). In addition, shared folders (One Drive, MS Teams) can be used on demand.
Project Risk Log	In general, imc keeps track of project risks in Project Status Reports. The usage of a separate project risk log depends on the business or technical complexity of the implementation project.
Project Change Log	In general, imc keeps track of project changes in Project Status Reports and Jira. The usage of a separate project change log depends on the business or technical complexity of the implementation project.

Project Milestone Plan	Milestones are covered in Project Status Reports / the Project Plan, and imc indicates whenever milestones are reached. The usage of a separate project milestone plan depends on the business or technical complexity of the implementation project.

3 Project Activities

Here we summarize the phased and ongoing project activities of the imc project roles.

3.1 Project Start

Item	Activity	Who
1	The Project Manager prepares the initial project plan based on the imc implementation methodology and project scope/order. The initial project plan will be aligned with the customer in the Project Welcome Call or Project Kick-off.	Project Manager
2	The Project Manager provides access to the imc Project Management Ticket Tool (Jira) for the customer project team (up to two accounts are offered by imc). In addition, the overall communication strategy (project status call, emails, ticket system, file sharing) will be defined.	Project Manager
3	The Project Manager opens the risk log and change log (as part of the Project Status report or as separate tools) to capture project risks identified at the start of the project and to add change requests during the project phase.	Project Manager
4	The Project Manager defines and agrees with customer project manager regarding project milestones . Milestones are part of the project plan and only in specific situation, a separate Project Milestone Plan is created.	Project Manager
5	The Business Consultant initiates & coordinates Technical Setup tasks with imc internal departments and customer.	Business Consultant

3.2 Regular Activities

Item	Activity	Who
1	The Project Manager will manage and monitor project scope, time, and budget .	Project Manager

2	The Project Manager / Business Consultant document project activities in Jira and update project ticket list . This also includes the monitoring of imc internal tasks related to other departments (Design, Hosting, Deployment, Technical Services).	Project Manager / Business Consultant
3	The Project Manager updates the risk log & change log as soon as new risk are identified and change requests are initiated.	Project Manager
4	The Business Consultant coordinates necessary delivery processes (patches, releases, customizations) with internal resources and informs customers regarding scheduled maintenance windows.	Business Consultant
5	The Project Manager inform the customer's project manager when milestones are completed via email with Account Manager in copy. In general, milestones are tracked in the project plan / project status report or in a separate milestone plan.	Project Manager
6	The Project Manager / Business Consultant ensures that all project related documents are stored in the imc internal project folder .	The Project Manager / Business Consultant

3.3 Weekly / Bi-weekly / Monthly Activities

Item	Activity	Who
1	The Project Manager organizes the weekly Project Status Call with core project team on imc and customer side.	Project Manager
2	The imc Project Manager discusses and updates the project risk log & change log together with customer's project manager once a week (e.g., within weekly status call).	Project Manager
3	The imc Project Manager updates the imc internal project reporting to Consulting Team Lead and Head of Consulting once a week (end of day on Fridays) within the main project implementation ticket (BC).	Project Manager
4	The imc Project Manager controls project budget with all involved imc resources (including Design, Hosting, Technical Services) once a week (end of day on Fridays).	Project Manager

5	Consulting Team Lead / Head of Consulting internally monitors project status with Project Manager based on the imc internal project reporting . In addition, resource planning and project budget is checked / controlled. These activities are on a weekly basis .	Consulting Team Lead / Head of Consulting & Project Manager
6	The Project Manager prepares the bi-weekly project status report and submits this report to the customer's project manager.	Project Manager
7	The Project Manager coordinates monthly an imc internal strategic project meeting with the Account Manager and (optional) Project Advisor.	Project Manager, Project Advisor, Account Manager
8	The Project Manager, Project Advisor, and Account Manager offer participation in customer stakeholder meetings once a month as optional services (needs extra order).	Project Manager, Project Advisor, Account Manager
9	Consulting Team Lead / Head of Consulting internally controls final project budgets and time reporting at the end of each month .	Consulting Team Lead / Head of Consulting
10	The imc Management (Head of Consulting, Team Leads, and imc Board member responsible for Consulting & Projects) monitors internal project status reports monthly .	Head of Consulting, Team Leads, Board member

3.4 Project End

Item	Activity	Who
1	The Project Manager coordinates, requests, and internally stores the official project closure sign-off document from customers' project manager (as part of the project closure procedure right after Technical Go-live). The document may contain non-blocking reported software defects or open activities that are handed over to support team or will be delivered after project closure (see Service Description Project Closure).	Project Manager
2	Project Manager coordinates formal handover to imc Support Team including Welcome to Support call.	Project Manager

3	Project Manager coordinates Sunset Meeting as formal handover to Account Management with customer.	Project Manager, Account Manager
4	Project Manager / Business Consultant ensures that all project documents are stored in the imc internal project document folder (OneDrive).	Project Manager / Business Consultant
5	Project Manager updates internal budget positions and time reporting at the end of the project and ensures alignment with Project Closure document.	Project Manager
6	Project Manager / Business Consultant conduct internal Lessons Learned process .	Project Manager / Business Consultant
7	Project Manager / Business Consultant update internal customer ticket (CUST) in Jira and inform imc support agent.	Project Manager / Business Consultant
8	Project Manager / Business Consultant closes the main project implementation ticket (BC) after all other activities are completed.	Project Manager / Business Consultant

Additional Notes: the previous tables describe the standard project management services offered by imc and considered in the LMS implementation project offer. In case other activities are requested, imc Account Management can rate the additional effort and offer additional services in case imc is able to. Typical examples are: (i) more frequent status calls (e.g., twice a week), (ii) participation in customer internal meetings (e.g., stakeholder meetings, internal project meetings, worker council), (iii) more frequent project status reports (e.g., once a week), (iv) usage of other project tools (e.g., ticket system of customer, customer file share), or (b) specific project plan or status report file formats.

4 Additional Topics

This last section covers additional topics such as escalation levels, managing change requests in projects, and managing unexpected resource bottlenecks.

Escalation Levels

Based on the project roles and the imc organisational structure, imc defined the following escalation levels for any LMS implementation project. Escalations must be announced and initiated with clear escalation scope.

- Level 0: Project Manager
- Level 1: Project Advisor (optional)
- Level 2: Consulting Team Lead / Head of Consulting
- Level 3: imc Board member

Managing Change Requests

The project scope is defined by the official order. Any deviation from the ordered project scope can be requested as Change Request. There are two types of Change Requests: (a) project work related change requests (e.g., extended test phase or project duration, additional trainings) or (b) change requests related to software (customizations / standard enhancements).

Any change request is identified and initiated by imc Project Manager & customer's Project Manager. Change requests are recorded in Jira. If the customer decides to investigate effort, imc project manager involves the Account Manager.

In some cases, budget shifts (with existing project positions) are possible or non-allocated project budget / on-demand budget can be used to realise Change Requests.

For software related change requests, imc Project Manager / Business Consultant will create imc internal tickets for effort estimation (REQ) such that imc Account Manager is able to offer the Change Request to the customer's Sponsor. The imc Account Manager can request support from Business Consultant / Project Advisor / Technical Coordinator if needed and provides quote to customer's Sponsor.

It is important to note that any Change Request might have direct impact to project timeline / project plan if the change request cannot be delivered after official project closure. Any impact on project timeline must be considered and additional Project Management might be needed.

Managing Unexpected Resource Bottlenecks

Any LMS implementation project plan must be realistic and consider the availability of resources. Nevertheless, unexpected bottlenecks in the availability of resources can occur at any time. It is imc's endeavour to communicate existing delays promptly and to adjust the planning.