



Frea Project

Joint Action plan - Activity 1.5

“Model of intervention - Toolbox”

Model step

Project management tools and
Handbook for workation operators

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1. Model step

A standard model based on financial advice documents, enterprise creation quick referral guide, synthesis on funding opportunities, communication tips&tricks, project management templates, handbook for actors will be developed. The set of tools will form a complete “toolbox”.

In this document you will find a short introduction to project management principles, related to all kind of companies and sectors, and a useful set of models/tools useful for the launch or refining of workation services.

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2. Project management principles

Project Management (PM) is the discipline of planning, organizing, and managing resources to achieve specific goals within defined constraints, typically scope, time, and cost. It involves a structured approach to handling projects, from inception to completion, ensuring that objectives are met efficiently and effectively.

Key elements of project management include:

1. **Scope:** Defining the project's boundaries, including the work required to deliver the intended results. This involves setting clear deliverables and objectives.

2. **Time Management:** Planning and scheduling tasks to ensure the project is completed within a set timeframe. This includes setting deadlines, creating timelines, and monitoring progress.

3. **Cost Management:** Budgeting and managing project costs to ensure the project is delivered within its financial constraints. This requires careful resource allocation and ongoing cost control.

4. **Quality Management:** Ensuring that the project deliverables meet the desired quality standards. This involves regular monitoring, testing, and evaluation of outputs to meet stakeholder expectations.

5. **Risk Management:** Identifying, assessing, and managing potential risks that could affect the project's success. Effective risk management helps mitigate the impact of unforeseen issues.

6. **Communication Management:** Facilitating clear and effective communication among all stakeholders. This ensures that everyone involved is informed about progress, challenges, and changes throughout the project lifecycle.

7. **Resource Management:** Managing human, physical, and financial resources efficiently to achieve project goals. This includes assigning tasks, balancing workloads, and making adjustments when necessary.

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8. Stakeholder Management: Identifying all individuals or groups who have an interest in the project and engaging them throughout the process to meet their needs and expectations.

Project management tries to cover all the phases of “Project Lifecycle”:

- Initiation: Defining the project’s objectives, scope, and feasibility.
- Planning: Developing a detailed project plan, including schedules, budgets, and resources.
- Execution: Carrying out the project work according to the plan.
- Monitoring and Controlling: Tracking progress, managing changes, and ensuring the project stays on course.
- Closure: Completing all project activities, delivering the final product, and closing out the project.

In essence, Project management is about guiding a project from start to finish in a structured and controlled manner, ensuring that goals are met within the constraints of time, budget, and scope while satisfying stakeholders’ expectations.

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3. Models and tools useful for workation services

In this paragraph will be presented some useful tools, generally applied to a wider number of companies and organizations, that can be adapted also for the development of Workation projects or services.

Tool 0 - Project charter (see Annexes)

The first model/tool is the Project charter. It's usually a short, straightforward document that serves as the foundation for a project. The project charter functions as both the project's internal marketing tool and reference guide.

Model 1 - Project plan

The Project Management plan collects all the rules for managing the project and the project baseline, the latter composed of the reference plans for the scope, times and costs. The Project Management plan is therefore a collection of homogeneous and highly integrated documents.

A Project Management Plan Template, such as the one shown in the following pages, therefore represents the summary of these documents in a configuration management such as to be able to keep track of the evolution of each of them. The table shows the list of documents present in the Project Management plan.

Auxiliary Plans	Baseline
(Scope Management Plan)	(Scope Baseline)
(Requirements Management Plan)	(Schedule Baseline)
(Schedule Management Plan)	(Cost Baseline)
(Cost Management Plan)	
(Quality Management Plan)	
(Communications Management Plan)	
(Human Resource Management Plan)	
(Risk Management Plan)	
(Procurement Management Plan)	

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In a small project it is possible to quickly build a plan that contains all the information regarding the scope of the work to be carried out, the time and resources necessary to carry it out. For large projects, planning is, however, an iterative process carried out in several phases, at different times and with increasing levels of detail.

Whatever the size of the project, the Project Management plan will constitute the “route” that the project will have to follow and will constitute the reference point against which, during construction, the deviations will be highlighted and the corrective interventions identified to bring it back into line with the expectations of stakeholders.

In the absence of such a plan, continuous monitoring and replanning in light of the actual performance of the activities is therefore not possible.

Project Management Plan			Document Code		
Project Management methodological references					
Reference Standard					
Reference Text					
Internal processes references					
Phases and processes of Project Management					
Phase	Process	Input	Methods	Informativ tools	Output
Phase 1					
Phase 2					
Project Management Plan components					

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Plan	Document	Version Nr. & date	Author	Role in the project	Document advancement
Auxiliary plan X					
Auxiliary plan Y					
Scope Baseline					
Scheduling Baseline					
Cost Baseline					

Notes for filling in:

Item	Explanation
Reference Standard	Reference standard which inspires the methodological approach set for project management (e.g. PMI)
Reference Text	Title and version of the standard text that inspired the methodology adopted (e.g. PMBOK® Guide)
Internal processes references	Documentary references for the retrieval and use of the project management procedures adopted by the company
Phases and processes of PM	
Phase	Identification of the phases into which the project is broken down
Process	Name of the processes that must be executed during the phase
Input	Documents necessary or useful for carrying out the process
Method	Methods of processing input data necessary or useful in the process
Informatic tools	IT tools necessary or useful for carrying out the process
Output	Documents to be issued during the process
Project Management components	
Plan	Auxiliary plan or project baseline
Document	Name of documents relating to auxiliary plans or baselines
Version Nr. & date	Document version number and version issue date
Author	Surname and name of the document editor
Role in the project	Role assumed in the project by the document editor
Document advancement	State in which the version of the document is located. Possible values: in preparation, in approval, approved

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4. Handbook for workation operators

The minimum contents of a manual (Handbook) to support tourism operators are described below. The manual allows you to synthetically manage, through specific tools, the main variables and processes to pay attention to for a correct and more functional provision of services related to workation and also to highlight the obstacles to overcome.

Handbook for workation operators

Annexes

- Tool 0 - Project Charter
- Tool 1 - Business model (Canvas)
- Tool 2 - Stakeholders map
- Tool 3 - Risks
- Tool 4 - Budget
- Tool 5 - Communication plan
- Tool 6 - Planning Check list
- Tool - Project Management Dashboard
- Tool - PM_Manual

See single Tool files attached.

5. Additional resources

Workation weblinks

The “workation” trend, which merges work and vacation, is gaining momentum as it allows people to work from diverse and often exotic locations. Originally popularized by digital nomads, workations have become more accessible thanks to global connectivity and the rise of remote work options. During a workation, people can work from places like beaches, national parks, or historic cities, enjoying a relaxing and inspiring environment without sacrificing productivity

Many travel destinations and resorts have adapted to this trend by offering specialized packages for remote workers. For example, in Japan, some hotels located in national parks provide dedicated workspaces with breathtaking views. In the Maldives, luxury workation packages include private beaches where guests can set up their workstations, combining productivity with leisure. Additionally, countries like India and Thailand have introduced long-term packages for those wanting to work while immersing themselves in new cultures

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Some companies are also promoting workations as a way to reduce employee stress and boost creativity, as new environments and freedom of movement can inspire fresh ideas. However, balancing work and relaxation is key to avoiding a situation where workations turn into nonstop work without proper downtime

For more on global workation opportunities, you can explore articles from:

[Global Payroll Platform](#)

[Let's Roam](#)

[Vantage Circle](#)

[VICE](#)



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Additional resources about tourism trends and single countries' performance can also be found through:

<https://tourism-dashboard.ec.europa.eu/background-methodology?lng=en>