IS&T Project Management: Project Management 101

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Session Objectives

- Review the basics of project management

- Discuss obstacles to effective project management

- Share practices that work for you

- Empower you to try some new practices

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Background: What is project management?

- ☐ Who, what, when, and why for projects

  - ▪ A defined and sponsored project scope

  - ▪ A roadmap for deliverables

  - ▪ Documented roles and responsibilities

  - ▪ A common language for communication relative to project phases, tracking and reporting

  - ▪ Processes to enable communication, accomplish the work, facilitate issue resolution and risk mitigation

Project management processes and tools help the project manager and team to organize, document, track and report on project tasks and progress.
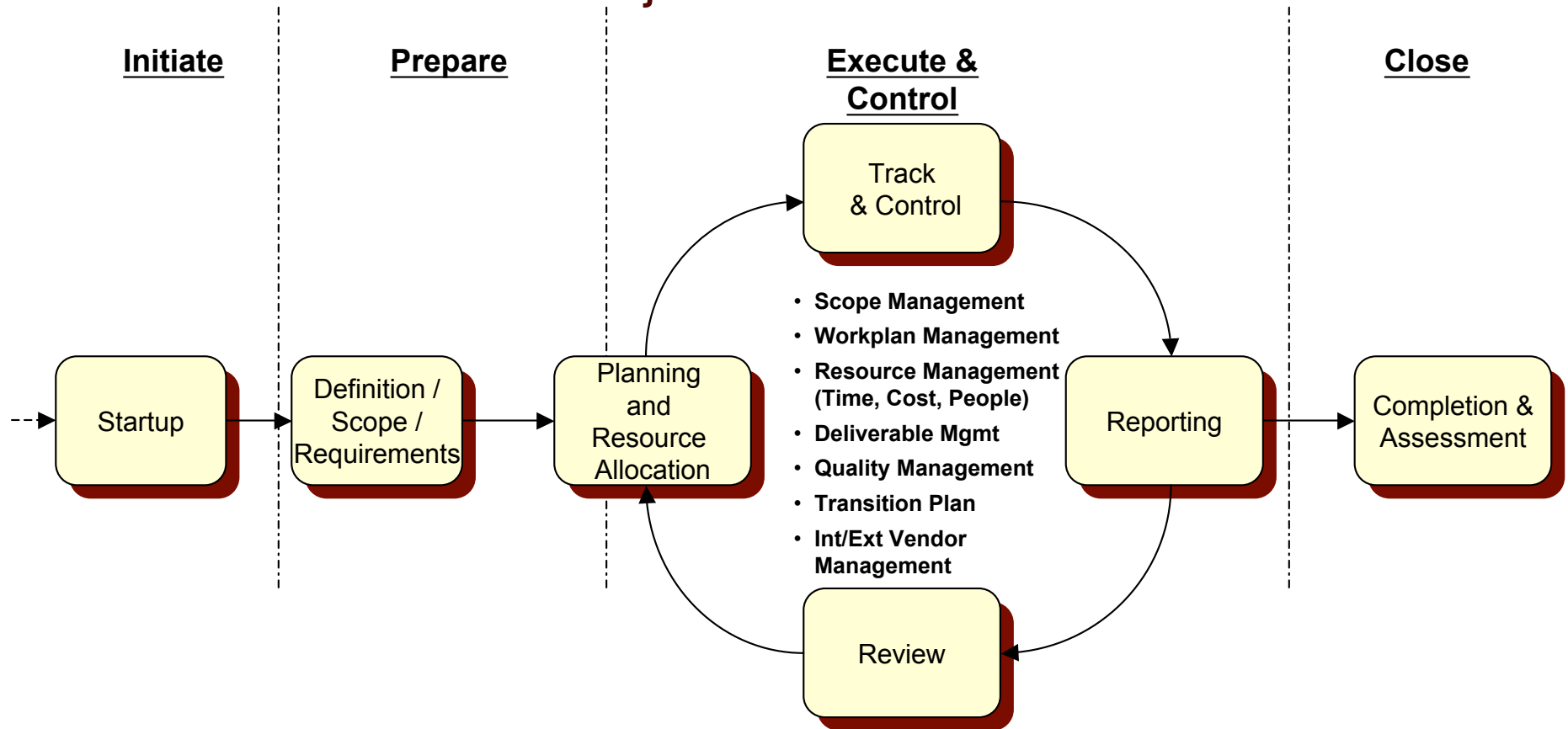
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Background: Why project management for IS&T?

□ More projects are spanning the Institute

□ More projects are requiring client involvement

□ Resources are constrained

□ Combination of these factors makes the control and management of the various project initiatives more difficult than in the past

□ A consistent approach to manage scope, resources, time and cost enables project management effectiveness

Project Management is a way of doing business for all project team members

✓ Provide project managers easy-to-use checklists and templates that target the fundamental concepts of project management

✓ Utilization of the tools will increase the probability of project success

✓ Provide all project team members and stakeholders with a road map of the project, defined roles and expectations

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Project Framework

Initiate **Prepare** **Execute & Control** **Close**

Startup → Definition / Scope / Requirements → Planning and Resource Allocation

Track & Control

- **Scope Management**
- **Workplan Management**
- **Resource Management (Time, Cost, People)**
- **Deliverable Mgmt**
- **Quality Management**
- **Transition Plan**
- **Int/Ext Vendor Management**

Reporting

Review

→ Completion & Assessment

Risk & Issue Management
Sponsor Management
Communication Management

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Basic Project Management: Five Steps

The following steps comprise the project management roadmap. The steps may overlap and be iterative:

1. Startup
2. Define and Confirm Scope/Requirements
3. Develop Plan and Secure Resources
4. Track, Control, Report and Review
5. Completion and Assessment

Communication, Risk and Issue Management, and Sponsor Management are essential throughout the project -- both planned and spontaneous.

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Step 1: Startup

As you engage potential team members and stakeholders, project initiation activities establish the scope, goals and preliminary plan.

- ☐ Key Activities
  - ■ Document and/or confirm scope and assumptions
  - ■ Confirm sponsorship and funding
  - ■ Draft high level plan
  - ■ Identify who needs to provide input into plan and resources

- ☐ Checklists to consider
  - ■ Project Startup and Sponsor

- ☐ Templates to consider
  - ■ Project Scope, Gantt Chart and Resource Planning
  - ■ Project role descriptions

Identify and engage the IS&T groups that you will need to provide services for your project.

Step 2: Confirm Scope and Define Requirements

Engage your sponsor and business stakeholders to confirm the project scope and clarify business requirements. It is also the time to identify the technical requirements with the appropriate IS&T providers (as necessary).

- ☐ Key Activities
    - ■ Confirm baseline project scope with Sponsor
    - ■ Define, document and confirm business and technical requirements
    - ■ Identify impact on business processes
    - ■ Identify what's not in scope

- ☐ Checklists to consider
    - ■ Sponsor

> The baseline scope is needed to kickoff the project – refinements can be made later as necessary.

- ☐ Templates to consider
    - ■ Project Scope

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Step 3: Develop Plan and Secure Resources

The initial detailed project plan will provide a project roadmap and baseline for all team members and stakeholders. As the project evolves, the plan may need to refined.

- ☐ Key Activities
  - Identify who needs to provide input into plan
  - Develop preliminary detailed plan based on scope, requirements, etc.
  - Identify skills sets needed to accomplish tasks
  - Develop communication plan
  - Identify and secure resources
  - Conduct pre-kickoff meeting with Sponsor
  - Conduct kick-off meeting
  - Conduct risk assessment with team members
  - Identify the criteria for stopping the project
  - Update detailed plan and get buy-in from team and Sponsor

> The kick-off meeting should be a collaborative effort with your sponsor.

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Step 3: Develop Plan and Secure Resources (cont'd)

- ☐ **Checklists to consider**
  - ■ Project Planning
  - ■ Deliverable and Quality Assurance
  - ■ Transition

- ☐ **Templates to consider**
  - ☐ Activity list
  - ☐ Detailed project plan
  - ☐ Project Resource Plan
  - ☐ Communication matrix
  - ☐ Project Risk Assessment

Step 4: Track, Control, Reporting and Review

Once you kick off the project, the track, control, reporting and review activities will be iterative and comprise the bulk of the project management tasks.

- ☐ Key Activities
  - ■ Implement communication plan
    - ☐ Hold regular team meetings to:
      - ■ share progress/status
      - ■ identify/resolve issues
    - ☐ Hold formal sponsor updates
    - ☐ Keep your manager informed
    - ☐ Keep stakeholders informed
  - ■ Monitor progress and report status
  - ■ Monitor risks and take action as necessary
  - ■ Identify and manage issues
  - ■ Manage scope and track changes
  - ■ Update plan as needed

> Tracking the project will give you the information necessary to assess the health of the project, as well as give you the information for reporting status to the sponsors and stakeholders.

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Step 4: Track and Control, Report and Review (cont'd)

- ☐ Checklists to Consider
  - ■ Sponsor
  - ■ Transition

> A quick review of the sponsor checklist may help you prepare for your sponsor and stakeholder update meetings.

- ☐ Templates to Consider
  - ■ Project scope change
  - ■ Communication matrix
  - ■ Project status snapshot
  - ■ Detailed Project Plan
  - ■ Risk Assessment
  - ■ Issue Log

Step 5: Completion and Assessment

The following activities will help to ensure a smooth transition and leverage lessons learned for future projects.

- ☐ Key Activities
    - ■ Develop a cutover plan or checklist, if applicable
    - ■ Complete documentation, training, and knowledge transfer
    - ■ Conduct final project review
    - ■ Conduct sponsor sign-off
    - ■ Transition to support/service organization or next project team
    - ■ Close-out final tasks and issues
    - ■ Conduct lessons learned
    - ■ Celebrate success

Accomplishing what the project set out to do is a success.

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Step 5: Completion and Assessment (cont'd)

- ☐ Checklists to consider
  - ■ Transition
  - ■ Project Closeout

- ☐ Templates to consider
  - ■ Issue log
  - ■ Detailed project plan
  - ■ Communications Matrix

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Basics of Project Management: Common Obstacles

Common obstacles you may face include:

- ☐ Unclear scope and business need
- ☐ Uncommitted sponsor
- ☐ Uncommitted resources
- ☐ Other?

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Basics of Project Management: What works for you?

- ☐ What have you found helpful?

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Basics of Project Management: Going Forward

☐ Establish goals that will enable you to build your project management skills

☐ Start to incorporate steps into daily work

☐ Continue to grow skills (e.g., courses, computer-based training

☐ Reference websites http://web.mit.edu/ist/pmm/

☐ Seek guidance from experienced project managers through coaching, mentoring, user groups

☐ Provide feedback on the IS&T project management methodology (PMM) http://istwiki.mit.edu/istwiki/ProjectManagementMethodologyFeedback

☐ Share ideas to help grow project management expertise within IS&T

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