IS&T Project Management:
How to Engage the Customer

September 27, 2005

Session Objectives

- ☐ Validate what currently works

- ☐ Empower you to try some new practices

- ☐ Learn some new practices

- ☐ Share practices that work for you

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Background: What is project management?

- Who, what, when, and why for projects

- Roadmap for deliverables

- Roles and responsibilities

- 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 tools help the project manager and team to organize, document, track and report on project tasks and progress.

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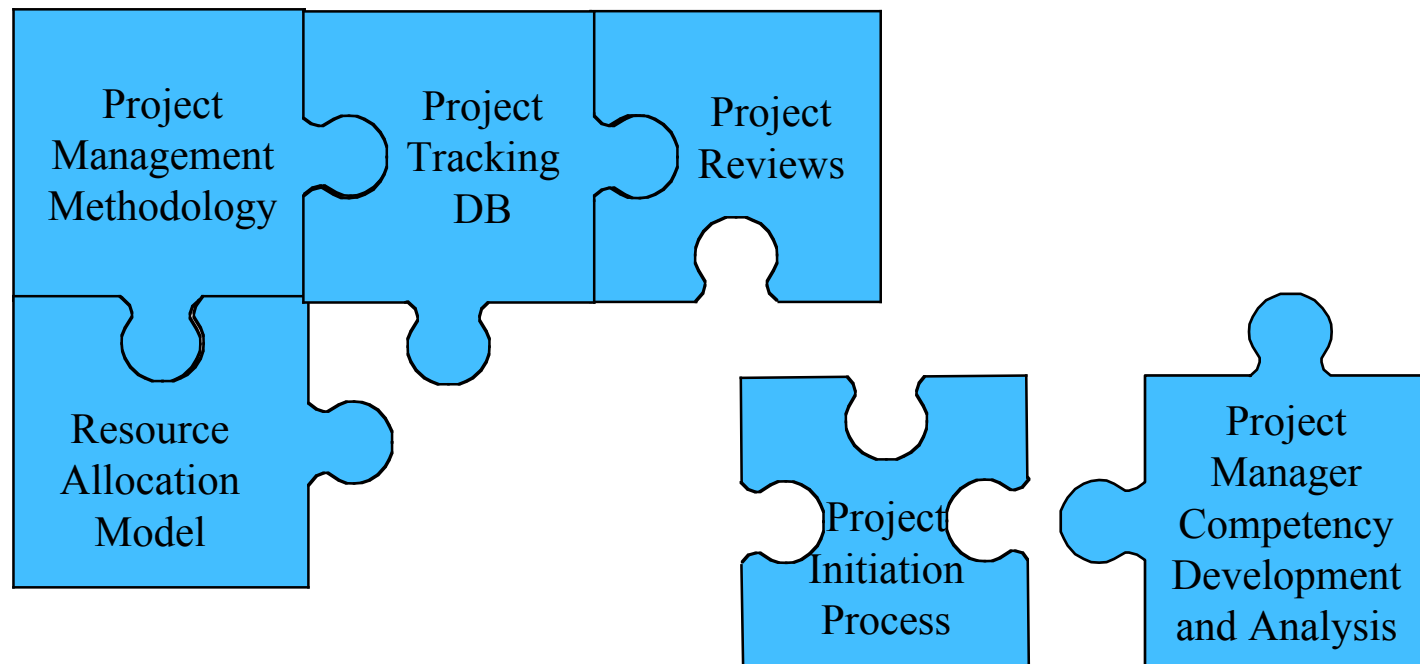# Background: Why project management for IS&T?

- There are approximately 65 major projects in IS&T

  - 3 are large, complex, multi-million dollar initiatives (e.g., HR/Payroll, EH&S, & SAPBud)

  - Methodology targets the remaining projects: SAP Hardware Renewal, Administrative Computing Strategy, Athena Release 9.4, IS&T Communications Strategic Plan, etc…

- 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

Project Management is a way of doing business, not a separate activity:

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

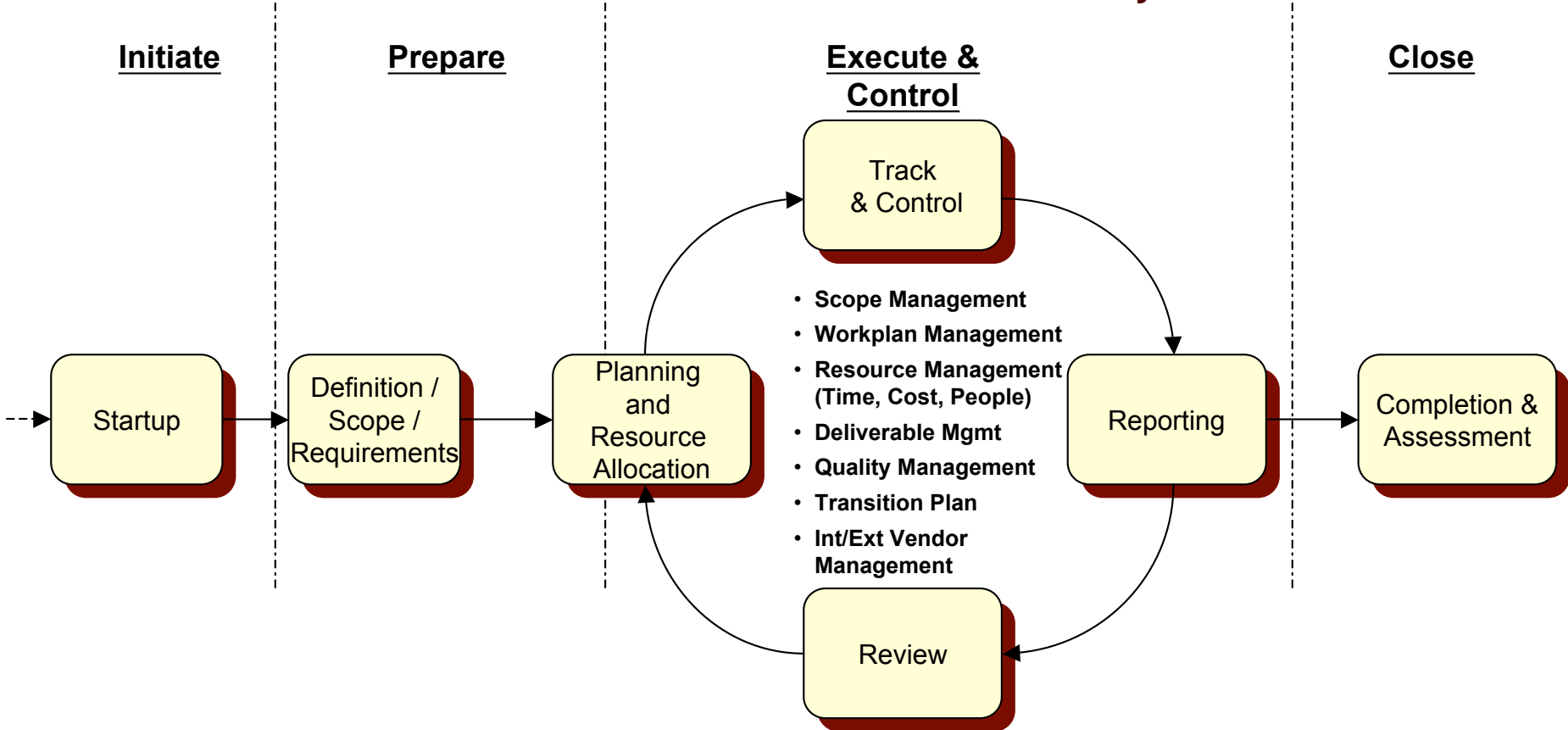✓ Utilization of the tools will increase the probability of project success

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Background: Pieces of the Puzzle

□ Components of IS&T project management

Project Management Methodology	Project Tracking DB	Project Reviews
Resource Allocation Model		

Project Initiation Process

Project Manager Competency Development and Analysis

There will be additional components in the future

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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How to Engage the Customer: Assumptions

☐ The Project Manager has relevant project history – e.g., project initiation, emails, agreements, etc.

☐ There is a designated Project Sponsor

☐ The Project Sponsor:
- champions the project, provides overall direction and funding, and approves all major milestones.
- sets the vision, common goals and critical success factors
- establishes or secures policy
- attends regular program reviews
- establishes the authorities of the project team and stakeholders
- approves the charter and scope of the project including deliverables
- sets priority of the project relative to other projects in her/his area
- ensures that resources are available to carry the project to its completion
- removes obstacles or other constraints
- authorizes changes in scope

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How to Engage the Customer: Five Steps

☐   Step 1: Prepare for initial sponsor meeting

☐   Step 2: Conduct initial sponsor meeting

☐   Step 3: Prepare for project kickoff meeting

☐   Step 4: Conduct project kickoff meeting

☐   Step 5: Communicate throughout project

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Step 1: Prepare for initial sponsor meeting

- ☐ Prepare/gather project related documentation
  - ■ Scope
  - ■ Assumptions
  - ■ Draft high level plan
  - ■ Resource requirements

- ☐ Determine project management approach
  - ■ Use IS&T PMM as appropriate
  - ■ Roles and responsibilities
  - ■ Ongoing communication approach

- ☐ Consider using these PMM Checklists/Templates
  - ■ Project Startup, Project Planning, and Sponsor Checklists
  - ■ Project Scope, Project Scope Change, Gantt Chart and Resource Planning Templates
  - ■ Project role descriptions

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Step 2: Conduct initial sponsor meeting

- ☐ Collaborate and establish agreement on project:
  - ▪ Scope
  - ▪ Roles, responsibilities, and specific people
  - ▪ High level plan with estimated dates
  - ▪ Ongoing communication approach/schedule
  - ▪ Kick-off meeting agenda and roles

- ☐ Send follow-up email to confirm agreements and confirm kick-off meeting agenda, etc.

> The facilitation of the project kick-off meeting should be a collaborative effort between the project manager and sponsor.

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Step 3: Prepare for project kickoff meeting

☐ **Prepare for meeting**

- ▪ Schedule meeting, etc.
- ▪ Refine meeting materials per sponsor meeting
- ▪ Distribute agenda/materials to team before meeting
- ▪ Allow time for questions when establishing meeting length

Step 4: Conduct project kickoff meeting

☐ **Conduct meeting**

- Confirm scope, roles and responsibilities

- Review high level plan, issue resolution process and status reporting approach

- Define project success criteria and communication strategy

- Leverage Issue Log, Status Report, and Communication Matrix templates as appropriate

☐ **Send follow-up meeting email with next steps**

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Step 5: Communicate throughout project

□ **With sponsor**
- ■ Schedule and hold regular updates as agreed to
- ■ Consider these preparation tips
  - ➢ anticipate questions and identify recommended solutions to issues
  - ➢ put yourself in "sponsor's shoes"
  - ➢ minimize surprises
- ■ Review progress, issues and recommended solutions, risk mitigations
- ■ Ask for advice

□ **With team**
- ■ Hold regular team meetings to share progress, status and to identify/resolve issues
- ■ Engage team to identify issue solutions and risk mitigations

□ **With your manager**
- ■ Keep IS&T management informed
  - ➢ minimize surprises

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How to Engage the Customer: Summary

- ☐ Preparation is key
- ☐ Planning meeting with sponsor
- ☐ Kickoff meeting with project team including business and technical team members
- ☐ Ongoing communication with sponsor, team, and manager

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