

# Project Management Overview

# Without Project Management



How the customer explained it



How the project leader understood it



How the engineer designed it



How the programmer wrote it

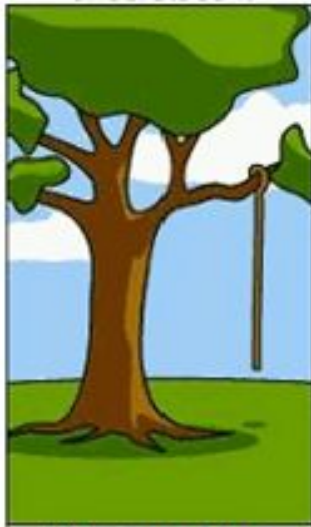


How the sales executive described it

# Without Project Management



How the project was documented



What operations installed



How the customer was billed



How the helpdesk supported it



What the customer really needed

# What is a Project?

- A temporary and one-time endeavor undertaken to create a unique product or service which brings about a beneficial change or added value.
- Differs from operations that are on-going work that repetitively produce the same product or service.

# What is Project Management?

- Provides tools and techniques that enable the project team to organize their work to deliver projects on time, on budget, and within scope.
- Promotes standards for how projects are selected, prioritized, planned, and executed.
- Tracks and communicates project progress, risks & changes.
- Enables project teams to focus on the solution.

# Why Projects Succeed

- Sound project management processes.
- Project tied to organization's business goals.
- Senior management commitment.
- Good change management.
- Realistic schedule.
- Good stakeholder relationships.
- Skilled team with defined roles and responsibilities.
- Availability of funding.

# Why Projects Fail

- Requirements not clearly defined.
- Lack of stakeholder buy-in.
- Lack of senior management commitment.
- Inadequate project planning.
- Absence of user involvement.
- New or unfamiliar technology.



# Role of Project Manager





# Project Manager

- Responsible for all project deliverables & communications.
- Develops Project Plan with project team.
- Manages project constraints, scope, quality, time, resources and budget.
- Requires management, leadership, communication, & interpersonal skills.

# Project Team Roles

- **Project Sponsor** - Project advocate, makes decisions on policy, budget, scope, priority, & changes.
- **Project Core Team** -
  - Ensures the project objectives remain in line with the Project Charter.
  - Ensures appropriate resources are committed and mitigates issues where necessary.
  - Reviews all change requests.

# Project Management Roles

- **Project Team Lead -**
  - Ensures staff resources required to complete the project are identified.
  - Works with the Project Manager to secure the resources and address resource gaps when necessary.
  - Go to person for task related questions.
  - Works with Project Manager to identify and document risks.

# Project Management Roles

- **Project Team** - Responsible for executing tasks & producing deliverables.
- **Steering Committee** - Includes management representatives from key organizations, key stakeholders that have special interest in project outcome.
- **Stakeholders** - Groups & individuals which are impacted by or can impact project outcomes.

# Project Classification

- One size does not fit all when it comes to managing projects.
- Classifying projects ensures they are reviewed, prioritized, and managed in a standardized and consistent manner.
- Classification happens as part of the project review process.

# How Do We Classify?

- Using a classification matrix, projects are classified based on *complexity* and *risk*.
- The factors used to determine an idea's Classification Level are:

- |                       |  |
|-----------------------|--|
| • Clarity of solution | • Number of systems involved                   |
| • Estimated duration  | • Number of users affected                     |
| • Estimated resources | • Impact on business processes & goals         |
| • Estimated cost      | • Affects strategic direction of campus or UMS |



# How Do We Classify?

- Other characteristics may elevate a project's Classification level. These projects involve systems that:

- Interface to enterprise systems for data related to Campus Solutions, Finance, Human Resources, Advance, etc.
- Require converting data from legacy system
- Require user authentication
- Access, transmit, process or store highly sensitive data such as Social Security Number

# Classification Levels

- Based on Classification Level, different combinations of reviewers/approvers and activities & outputs will be involved, starting with the project review process through project completion.
- There are three Classification Levels:
  - **Level 1:** Low Complexity and Risk
  - **Level 2:** Medium Complexity and Risk
  - **Level 3:** High complexity and risk

# Classification Levels

- **Level 1 - Low Complexity and Risk**
  - Simple schedule with few to no dependencies
  - Low total cost
  - Familiar to UMS technology or processes
  - Involves no or limited sensitive data elements
  - Impacts a single department or campus
  - Staffing involves a single campus
  - None to minimal vendor or consulting activity
  - Incremental effect on business processes & goals

# Classification Levels

- **Level 2 - Medium Complexity and Risk**
  - Schedule has dependencies
  - Intermediate total cost
  - Evolving UMS technology or processes
  - Large amount of sensitive data but no critical data
  - Impacts multiple campuses
  - Involves staff from more than one campus
  - Limited potential vendor or consulting activity
  - Clear effect on one or more business processes

# Classification Levels

- **Level 3 - High Complexity and Risk**

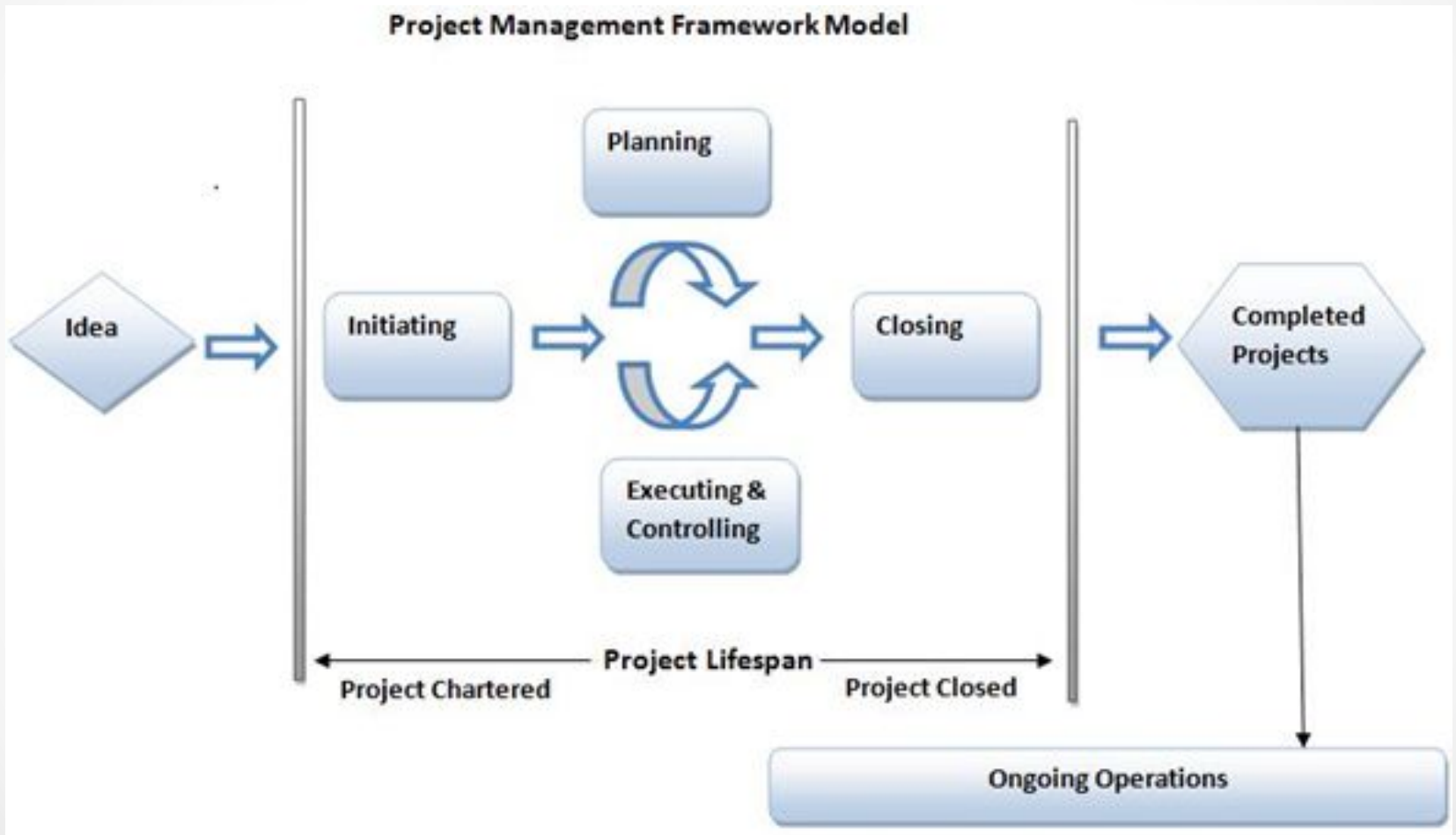
- Complex schedule with many dependencies
- High total cost
- New to UMS technology, techniques, or processes
- Extensive impact across campuses
- Involves critical data information (SSN and HIPAA)
- Involves staff from all campuses
- Extensive vendor or consulting activity
- Affects strategic direction of the UMS
- System-wide and/or external impact

# PM Framework

- The PMO facilitates the intake and review of all ideas and project requests.
- The Framework provides standardized process to submit, review, classify, document and manage IT projects.
- Designed to scale project management to the project's degree of complexity and risk.
- Ensures projects are approved and managed at the appropriate levels.



# PM Framework Model



# Idea

- Starts with an idea to create or revise a service, process, or solution.
- Must identify a project “sponsor” who has means to champion and support the project.
- Project proposer submits Idea Form and/or Project Initiation Form (PIF).
- Project requests are reviewed, approved and prioritized.

# Initiating

- Project team is formed.
- Project Manager and team develop Project Charter that:
  - Identifies stakeholders
  - Defines project timeframe
  - Describes project rationale
  - Establishes measures for success
- Phase concludes when sponsor signs-off on Charter.

# Planning

- Builds on information captured during initiating phase to develop Project Plan.
- Helps ensure the project is completed on time and on cost with limited surprises and deviations from the originating charter.
- Will consist of the schedule and resources for the project, budget requirements, performance measures, and clear actions for managing change, risk, & communications.
- With an approved plan, a project can move into Executing & Controlling phase.

# Executing & Controlling

- Phase where work gets done.
- Team completes work outlined in Project Plan.
- Delivers status reports.
- Monitors and reports on issues and risks.
- Monitors change & creates change requests.
- Updates to project documents where necessary.
- Phase concludes when project deliverable is accepted.

# Closing

- Project team conducts reviews to ensure deliverables are completed to specifications.
- Transfers project deliverable to operations & support staff.
- Project team documents lessons learned.
- Archives project documents for future reference.
- Team celebration!