

# MAKING EVERY PROJECT A SUCCESS

BECoP@UCSD

# Best practices: Project Foundation

- What defines a “Project?”
- Define the problem
- Clearly outline solution
- Identify appropriate resource(s)
- Identify project teams
- Tie back to [UC San Diego Strategic Plan](#)
- Comparable projects

What is a project?



# A project charter can help

## Problem:

Student Business Services (SBS) currently has manual process. This process requires students to physically deliver a signed piece of paper, known as a Master Promissory Note (MPN) to SBS staff. This impacts main campus, Financial Aid Office, SBS loan department, and Health Sciences Financial Aid office.

The Master Promissory Note (MPN) is a legal document in which you promise to repay your loan(s) and any accrued interest in fees. It also explains the terms and conditions of your loan(s)

## Solution

Procedural changes regarding the MPN e.g. system integration from the Financial Aid Office would help streamline the current process.

A method for electronically signing the MPN would reduce an average of 40 hours a month in processing paper MPNs.

- Improve cycle time
- Feed information into ACS (third party vendor/system) and SAM
- Use DocuSign/Salesforce to deliver MPN to students

# Resources and Project Teams

Are you asking the correct people for the right resources?

Who do you need on your team?



# Strategic Plan

UCOP, UC San Diego or your  
Department

[UC San Diego Strategic Plan](#)

# Comparable Projects



# Best practices: Project Management



- Identify role of each committee member
- Establish the scope of the project
- Outline deliverables and set milestones
- Communication





# Identify the Role of each committee member

ROLE  Project Deliverable (or Activity)	Project Leadership					Project Team Members					Project Sub-Teams					External Resources			
	Executive Sponsor	Project Sponsor	Steering Committee	Advisory Committee	Role #5	Project Manager	Tech Lead	Functional Lead	SME	Project Team Member	Developer	Administrative Support	Business Analyst	Role #4	Role #5	Consultant	PMO	Role #3	Role #4
<b>Initiate Phase Activities</b>																			
Request Review by PMO	A/C	R/A				R/A	A/C		C										
Submit Project Request						R											A		
Research Solution	I					R/A	A/C	A/C	C				C		C				
Develop Business Case	I	A/C	I	I		R/A	C	C	C			C			C	C			
<b>Plan Phase Activities</b>																			
Create Project Charter	C	C				R/A	C	C	C			C			C				
Create Schedule	I	I	I	I		R/A	C	C	C	C	C	C			C	I			
Create Additional Plans as Required	I	I	I			R/A				I	I	I	I		C	I			
<b>Execute Phase Activities</b>																			
Build Deliverables	C/I	C/I	C/I	C/I			R/A	R/A	R/A	R/A	R/A					A/C			
Create Status Report	I	I	I	I		R/A	R/A	R/A	R/A						C	I			
<b>Control Phase Activities</b>																			
Perform Change Management		C	C	C		R	A	A	A						C	I			
<b>Close Phase Activities</b>																			
Create Lessons Learned	C	C	C	C		R/A	C	C	C	C	C	C			C	C			
Create Project Closure Report	I	I	I	I		R/A	I	I	I	I	I	I				I			

# Establish the scope of the project



# Outline deliverables and set milestones



# Communication







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✓ Unique everything  
We have millions of one-of-a-kind items, so you can find whatever you need (or really, really want).


✓ Independent sellers  
Buy directly from someone who put their heart and soul into making something special.


✓ Secure shopping  
We use best-in-class technology to protect your transactions.


### Popular right now


- 

Baby Journal And Memory B...  
Illustries  
★★★★★ (674)  
\$31.00
- 

To My Significant Otter - Vale...  
MyZoetrope  
★★★★★ (2,841)  
\$5.00
- 

ESTI the fox. made-to-order ...  
LESNE  
★★★★★ (589)  
\$45.83  
Only 1 left
- 

Flower Dog Collar for Weddi...  
CupidCollars  
★★★★★ (176)  
\$46.51
- 

Forest Print, Geometric Print,...  
OjuDesign  
★★★★★ (295)  
\$6.52
- 

Decorative Pillow cover, Geo...  
gridastudio  
★★★★★ (534)  
\$19.50



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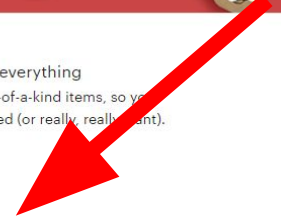
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- Custom Mickey Mouse Ears -...  
Campus LISA  
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\$31.00
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Custom Mickey Mouse Ears -...

Campus LISA

★★★★★ (674)

**\$31.00**



# Best Practices: Sustaining the Momentum

- Capture the energy
- Continue with best practices for project management
- Exercises for sustaining momentum

# All the ways we lose momentum

- Lack of communication
- Lack of active sponsorship
- We've planned, ideated, proposed solutions, and created excitement...  
... and then nothing...
- Time to give the project and the team a shot of adrenaline!

# Adapting the FMEA

- Traditional application of the Failure Mode Effects and Analysis tool
  - Product design
  - Features and Offerings
  - Specification Requirements
- Use it this way too
  - Task/Action items
  - Take on roadblocks and false starts
  - Harness the collective knowledge of the team to
    - Eliminate barriers the task owner can't eliminate on their own
    - End the excuse-making
    - Overcome fear and paralysis

# Tactics, Daily Management, and Discipline

- Tactics
  - Immediate accountability
  - Dual owners
  - The “wants” document
- Daily Management
  - Communication plan
  - Check lists
  - Organize your work with visual signals
    - “Kanban”
    - Visual representations of your work and to-do’s makes it feel more manageable
- Discipline
  - Momentum starts with you
  - Use the tools that work for you, not the ones someone else wants

# The importance of teams and networks

- Learn from others
- Share knowledge and build knowledge
- Don't worry about not being an expert
  - Use what works for you, at the level you're comfortable with

“A jack of all trades and master of none...”

# The importance of teams and networks

- Learn from others
- Share knowledge and build knowledge
- Don't worry about not being an expert
  - Use what works for you, at the level you're comfortable with

“A jack of all trades and master of none... oftentimes better than a master of one”

# Need help?

Ask BECoP!





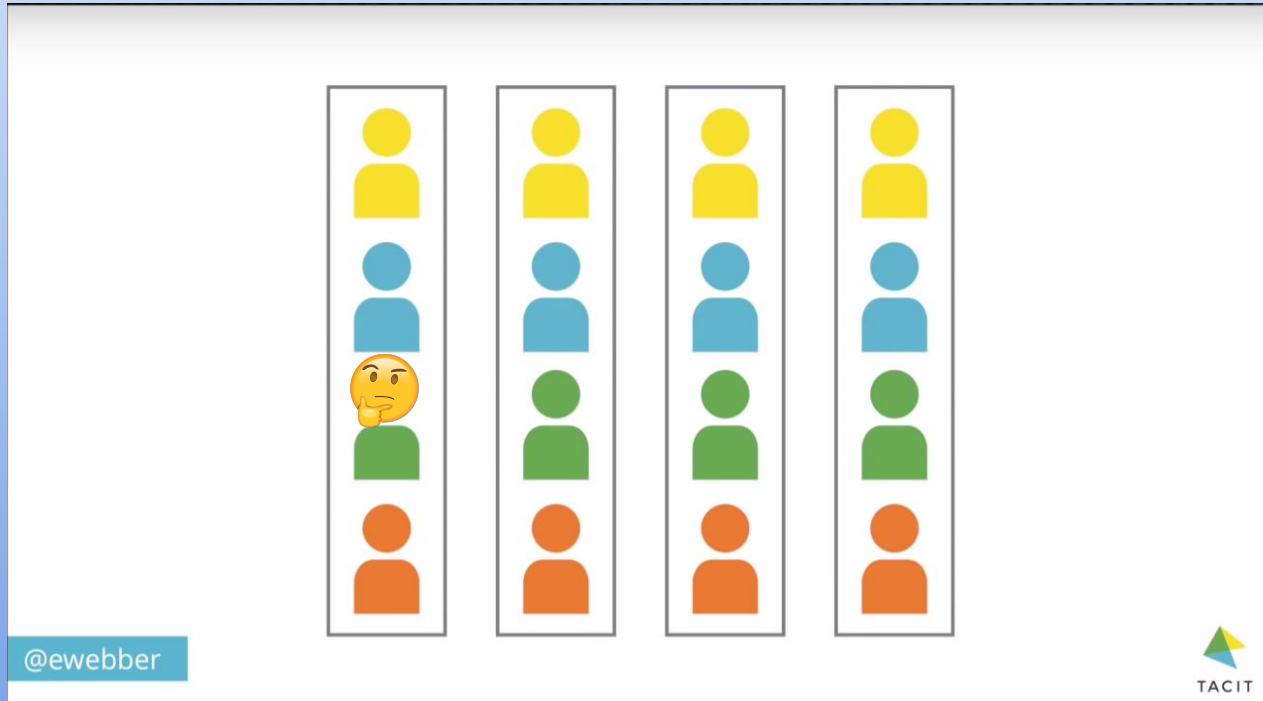
# Groups of Practitioners

The diagram consists of four vertical columns, each enclosed in a thin black rectangular border. Each column contains five stylized human figures. The first column contains five yellow figures. The second column contains five blue figures. The third column contains five green figures, but the top-most figure is replaced by a yellow smiley face emoji (😊). The fourth column contains five orange figures. In the bottom-left corner of the white area, there is a teal rectangular box containing the text '@ewebber'. In the bottom-right corner, there is a logo for 'TACIT' which includes a stylized triangle made of three smaller triangles in green, yellow, and blue.

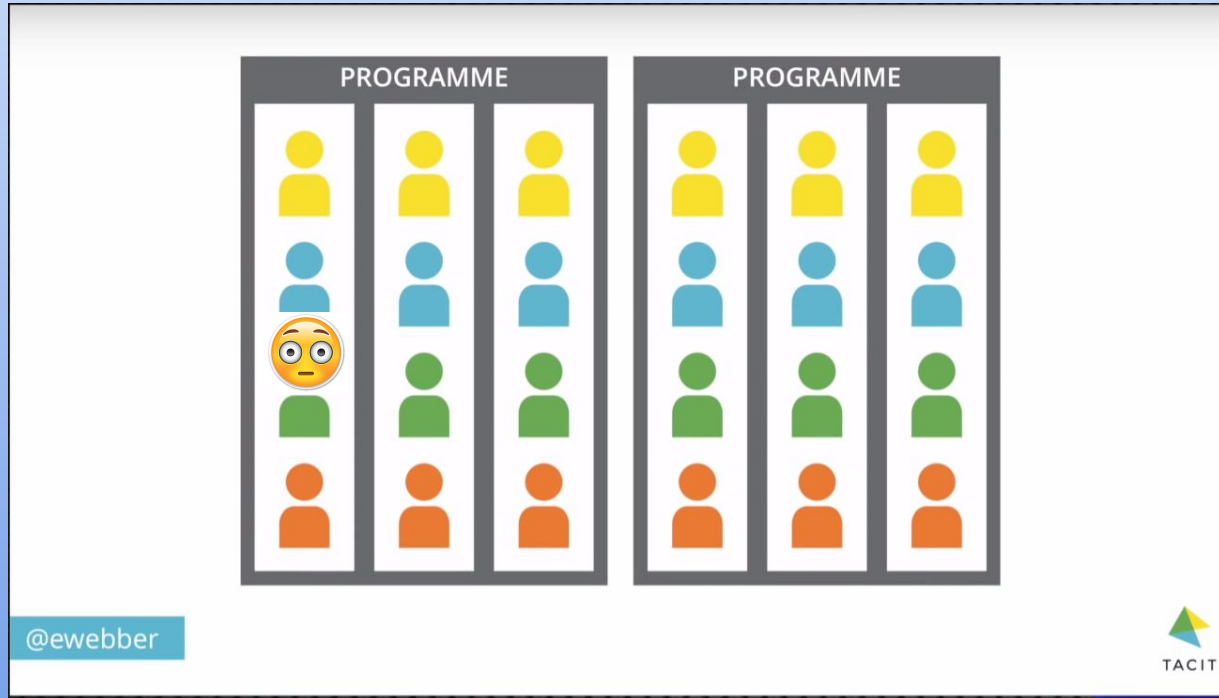
@ewebber

TACIT

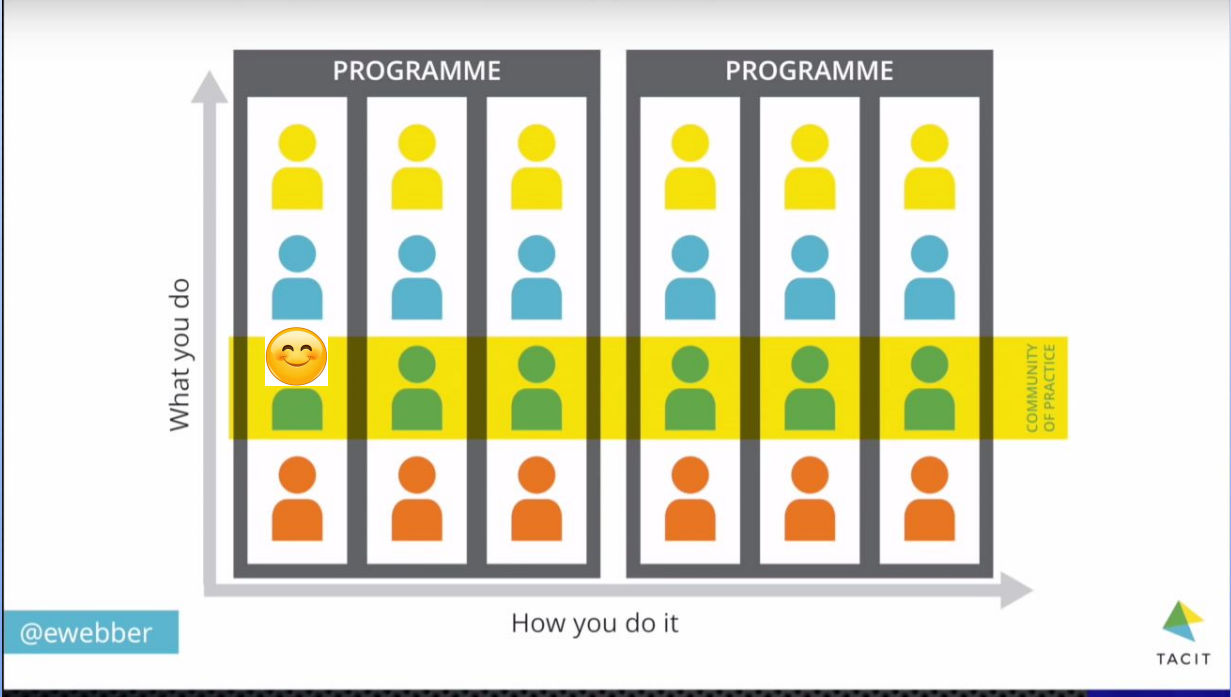
# Practitioners on Teams



# Teams in Programs



# Communities of Practice Across Teams

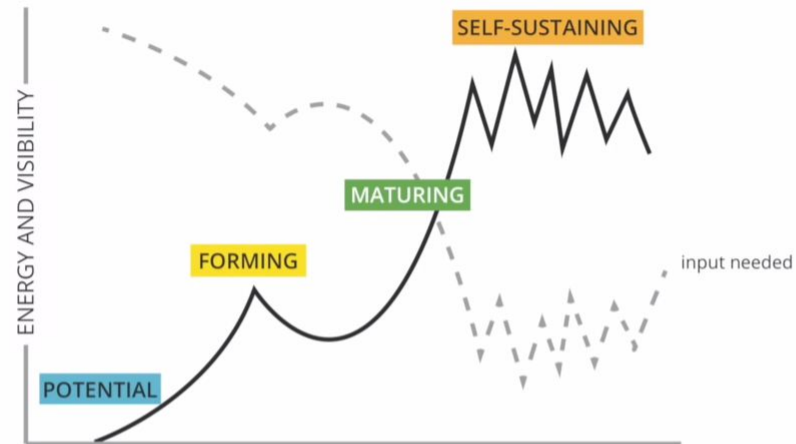


# Benefits to Practitioners



# Sustainability

## Community maturity stages



Adapted from Cultivating Communities of Practice - Wenger, McDermott and Snyder

@ewebber



# BECoP

- UCSD Goal 5: Creating an agile, sustainable and supportive infrastructure by ensuring a dedication to service, people, and financial stewardship
- Begun in October 2017
- Executive Board & Committees
  - Over 140 members

Continuous  
Improvement

Project  
Management

Change  
Management

**Business Excellence**



## Continuous Improvement

Lean Six Sigma



## Project Management



## Change Management

### Business Excellence CoP

Business Improvement practitioners bound together by shared interests as change agents, business improvement practitioners to foster operational excellence.

# Business Excellence CoP

- Web site:
  - <http://becop.ucsd.edu>
- Monthly Events
  - <http://becop.ucsd.edu/calendar>
  - <http://becop.ucsd.edu/training-resources>
- Mailing List
  - <http://becop.ucsd.edu/join-the-community>
  - [becop-l@ucsd.edu](mailto:becop-l@ucsd.edu)
- Slack
  - [becop.slack.com](http://becop.slack.com)

# BECoP Events: Past Opportunities



## 2017

- **November:** Process Palooza
- **December:** The 3 Most Underutilized Tools in Lean

## 2018

- **January:** Radical Candor
- **February:** Current State: Find Out What Really Happens
- **March:** Making Project Planning a Success
- **April:** Ice Breakers & Ice Cream
- **May:** Project Momentum
- **June:** Campus LISA!

# BECoP Events: What's Planned!



- **July 25:** *Checklist Manifesto* with Will Ford, Director, Project Management Office, UCSD Health Systems
- **August 20:** *Employee Engagement During Times of Change* with Christi Gilhoi, Employee Engagement Manager, Qualcomm

## ***Also coming this Fall***

- **Carrie Steele**, Head of Industry, Google
- **Lisa Shaffer**, Former Deputy Mayor, Encinitas City Council & NASA Div. Dir.

# BECoP Events: Lead, Share, Inspire



*As a community of practice, our strength comes from learning from and supporting one another.*

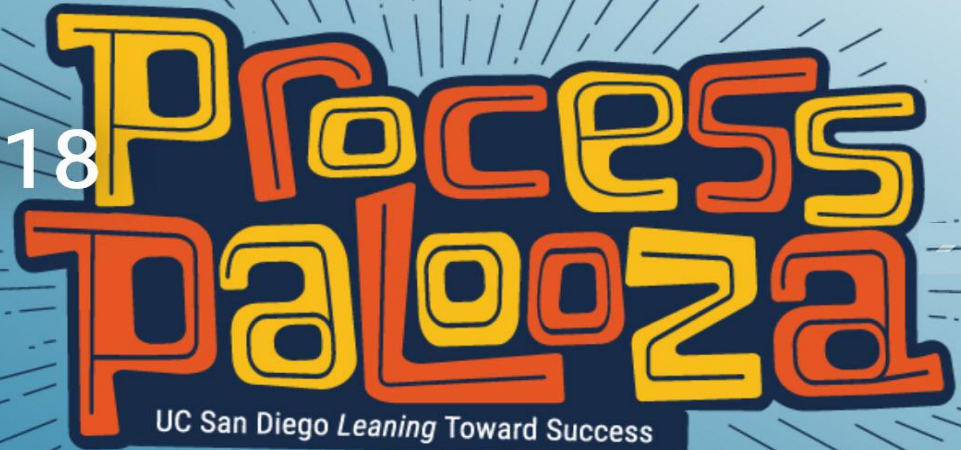
Please contact me if you are interested in giving a workshop, training, or have ideas for events.

***Special Events & Programs Committee Chair***

Lynn Underwood, [lunderwood@ucsd.edu](mailto:lunderwood@ucsd.edu)

# Annual Event: Process Palooza

SAVE THE DATE  
NOVEMBER 14, 2018



Thank you!