

Project Management Lite ©

Presented by Nicole May & Zach Herman

Learning Objectives

1. Understand the fundamental concepts and language of project management
2. Learn standard processes and tools for managing low- to medium-complexity projects

What you Will Receive from this Training

1. Personal Satisfaction and Confidence
2. Ongoing Support from the UCSDH IS PMO including additional training opportunities

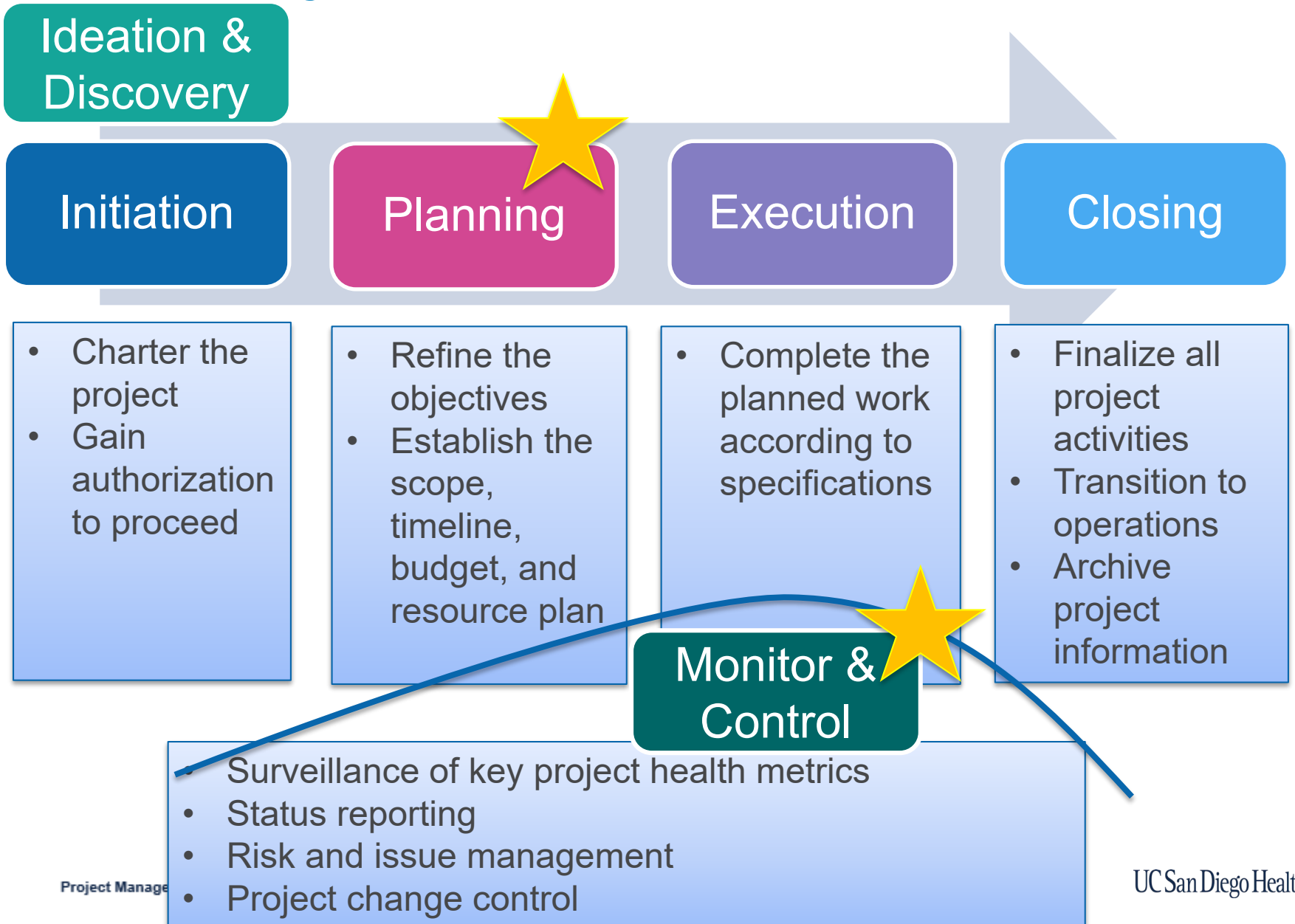
Project Management Fundamentals



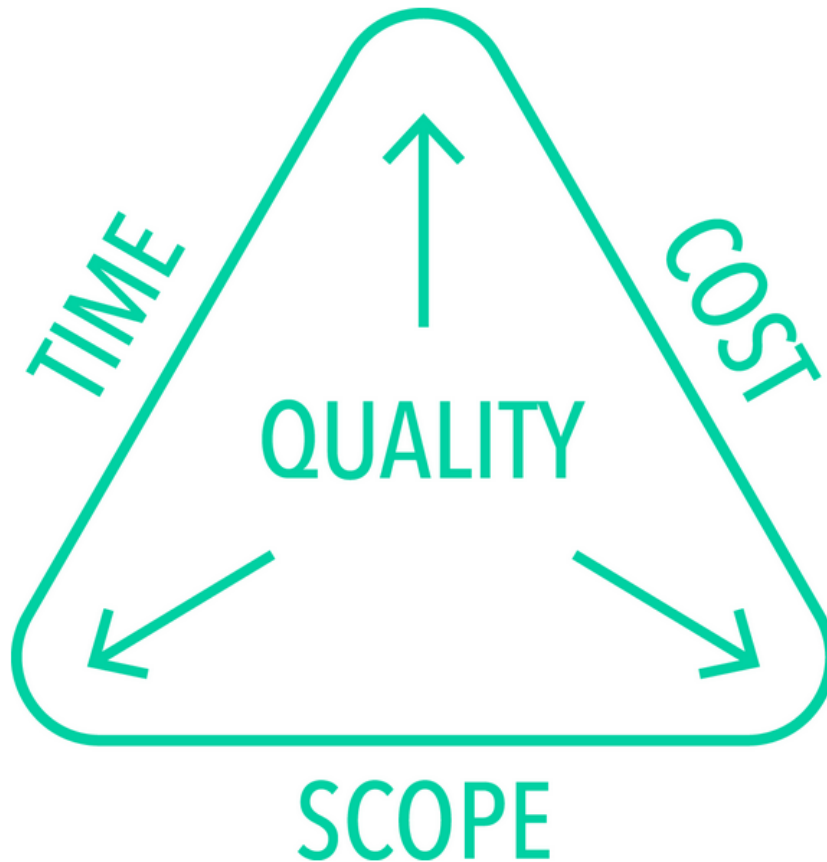
Project Work and Operational Work

Project Work	Operational Work
Temporary	On-going
Output: Unique	Output: Repetitive
Purpose: Reach an objective and then transition to support	Purpose: Sustain the business

Project Management Process Groups



The Project Management Iron Triangle



- At its core, the discipline of project management is concerned with the appropriate stewardship of limited resources.
- The objective is to maintain the right balance of the “Triple Constraints” to achieve high-quality project outcomes, which are agreed-to in advance of the project by the customer.

What is a Project Manager?

A Project Manager is the person responsible for leading a project from its inception to its close-out.

Project Managers...

- are responsible for planning, execution, and management of the people, time, resources, and scope of the project.
- have the discipline to create clear and attainable project objectives and to see them through to successful completion.
- are the first point of contact for any issues or discrepancies within a project and must **communicate** project status, risks, and issues effectively for appropriate organizational decision-making.
- strive to maintain progress, foster positive team dynamics, and task project participants in such a way that reduces the risk of failure, maximizes benefits and minimizes costs.

The Art and Science of Project Management

“Lots of accountability, little authority...”

Science



Metrics
Processes
Templates



Art



Influence
Customer Service
Intuition



Project Management Lite Toolkit



Ideation & Discovery

Initiation

Planning

Execution

Monitor & Control

Closing

Idea & Proposal

A3/Charter

Project Schedule

Comms Plan

Status Report

Meeting Minutes

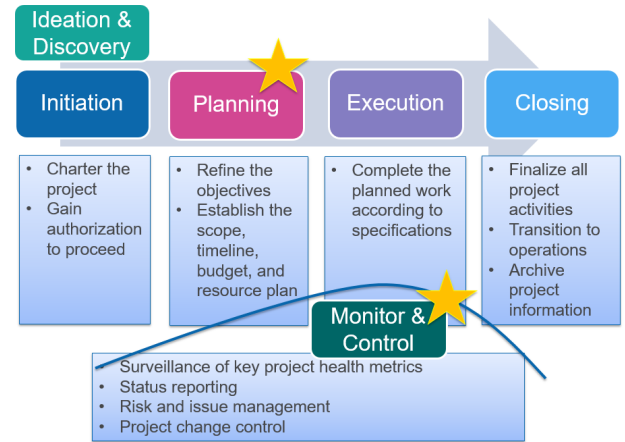
Risks, Issues, and Changes Log

Lessons Learned Log

Project Artifacts: To be maintained and retained

Phase 0

Ideation & Discovery



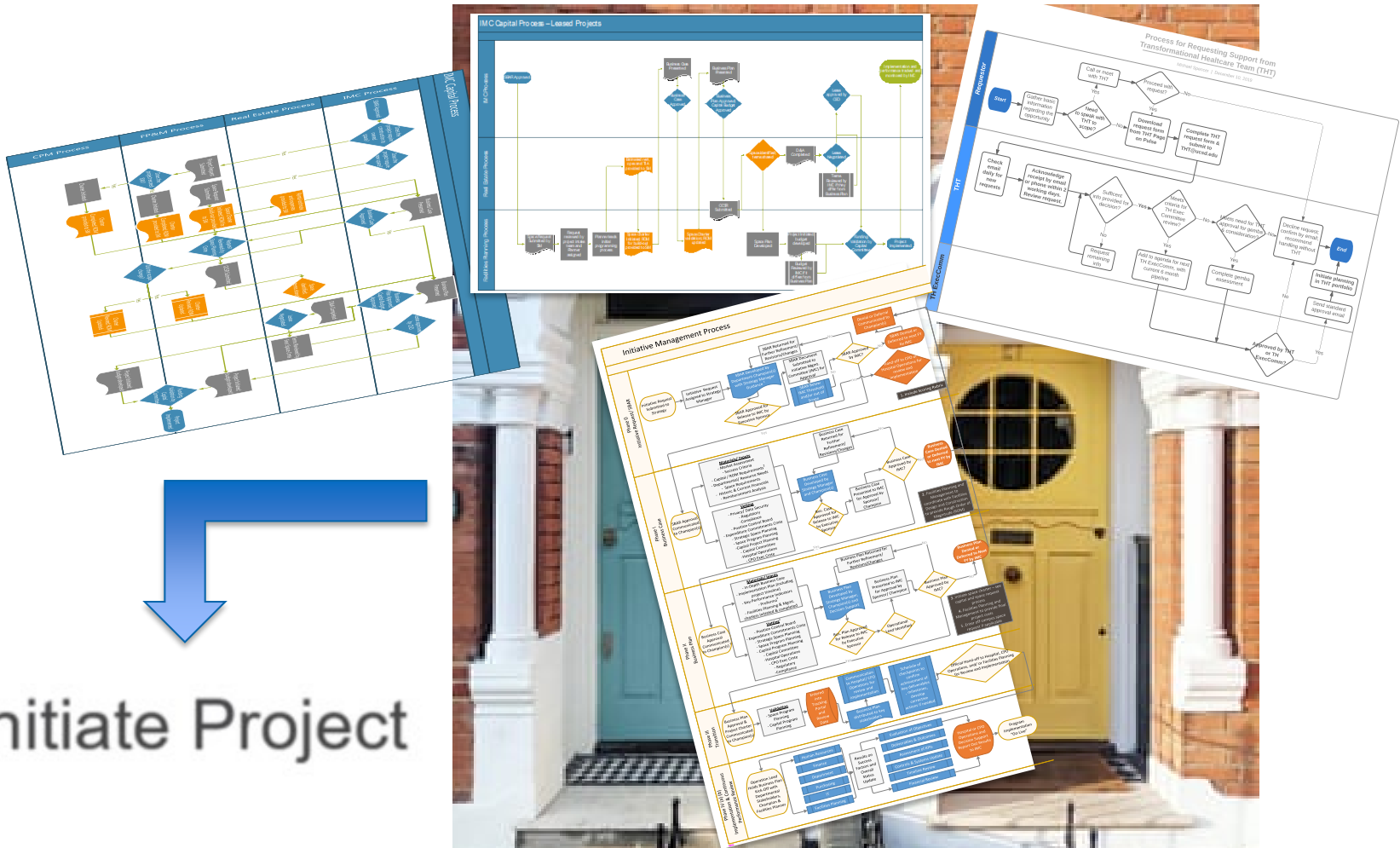
Ideation: How an Idea Becomes a Project



Ideation and Discovery at UCSD - Information Services



Ideation and Discovery Across the UCSD Enterprise



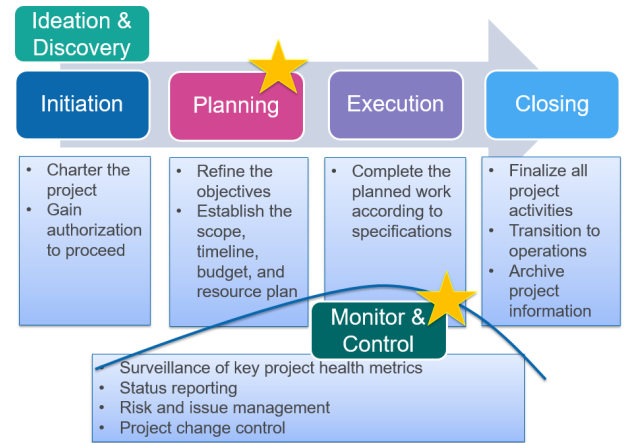
Initiate Project

Phase 0: Ideation and Discovery is Complete When...

- Proposal intake is complete
- Project has been approved to proceed by the appropriate governance body
- Project has been assigned to a Project Lead
- Governance is alerted that the is project ready for activation
- Project is initiated

Phase 1

Initiation

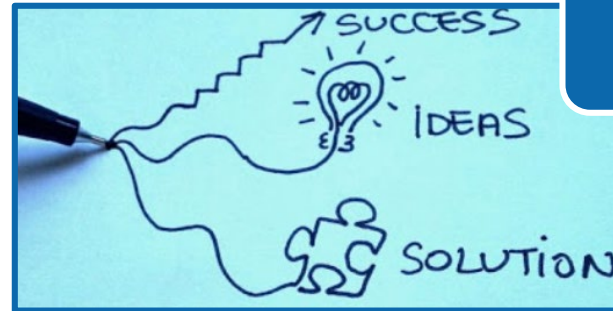


Idea → Project Charter Lite

- A Project Charter is a document issued by the project initiator (“customer”) that formally authorizes the project to proceed and provides the project manager with the authority to apply organizational resources to project activities
- For less complex projects, a Proposal A3 can be elaborated upon to become a Project Charter Lite and provide sufficient information for the project to proceed
- For complex projects, the Project Charter may be a separate, formal, and descriptive document
- The Project Charter Lite is a contract. Significant changes the general parameters outlined in the Project Charter Lite must be approved by the project initiator and appropriate leadership



Proposal A3



- A3 is Lean Six/Sigma Term
- A **Proposal A3** suggests a future-state idea to improve the current situation
- The Proposal A3 will turn into the formal Charter
- The A3 Proposal should be stored and kept to return to for updates and reference

Project Charter Lite

Current Situation		Known Project- Specific Issues, Risks and Dependencies				
Description of Proposed Solution and Key Impacts		People Resource Requirements				
		Role	Estimated Level of effort		Team Manager	
Evaluation of Alternatives		Implementation Schedule				
		Major Deliverable	Due Date		Responsible Person/Role	
In-Scope and Out-of-Scope Considerations		Measurement of Success				
		Success Metric	Data Source	Timeframe	Baseline Value	Expected Value
Signature & Funding						
20	Project Lead	Customer	IS Director	Requires Funding (Y/N)?	How Much?	Capital/Opex /Both?

Project Management Lite Case Study: Family Road Trip

Your family of 4 has decided to embark on The Great American Road Trip for its annual summer vacation.



After three riveting rounds of Rock, Paper, Scissors, you earned the honor of organizing the trip. However, everyone in your family is willing and able to help.

The trip is four months away, and there is a lot to accomplish: choose a route, create an itinerary for sightseeing and activities, make logistical travel arrangements, prepare for travel, go on vacation, and come home happy, safe, and sound. Luckily, you won the office Super Bowl pool this year and money is no object.

Project Managers, your family is counting on you to make this the trip of a lifetime!

Team Exercise

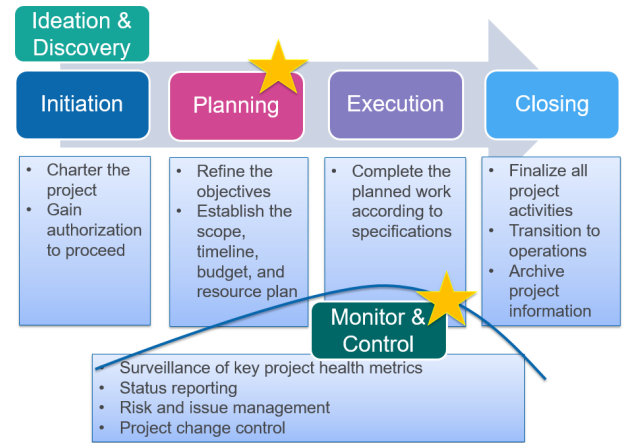
Current Situation	Known Project- Specific Issues, Risks and Dependencies				
<p>It has been way too long and the family really could use a vacation.</p>	<p>Known risks are weather as this will be during the summer and not all places have predictable weather. A key dependency would be securing the time off.</p>				
Description of Proposed Solution and Key Impacts	People Resource Requirements				
<p>The family will be driving across country during the months of June & July, seeing every baseball stadium in the country. Due to the amount of time required, we will be renting an RV and will be hiring a driver and a babysitter in case everyone needs a break from each other.</p> <p>The trip will begin and end in San Diego, CA.</p> <p>Key impacts will be the amount of work both parents will be missing could pile up so they will need to ensure they have proper coverage. The children will be out of school for the summer so the only impact to them is that they will not be doing any other camps or activities this summer.</p>	Role	Estimated Level of effort	Team Manager		
	Parent 1	High	Parent 2		
	Parent 2	High	Parent 1		
	Kid 1	Medium	Parent(s)		
	Kid 2	Medium	Parent(s)		
	Driver	High	Parent(s)		
	Babysitter	High	Parent(s)		
Evaluation of Alternatives	Implementation Schedule				
<p>We have explored not renting a RV but instead driving ourselves. Due to the amount of time spent on the road the family felt this was not in our best interest.</p> <p>We have explored flying to each destination but the costs were too high.</p>	Major Deliverable	Due Date	Responsible Person/Role		
	Route planned	May 1, 2021	Parent 1		
	Family kick off meeting	May 21, 2021	Parent 2		
	East Coast reached	June 30, 2021	Parent 1		
	All Stadiums attended	July 14, 2021	Parent 2		
	Trip Ends	July 31, 2021	Driver		
In-Scope and Out-of-Scope Considerations	Measurement of Success				
<p>In-Scope:</p> <ul style="list-style-type: none"> • 30 baseball stadiums. • RV as means for transportation. • Souvenirs from each stadium. <p>Out of Scope:</p> <ul style="list-style-type: none"> • Additional site seeing • Grandparents 	Success Metric	Data Source	Improvement Timeframe	Baseline Value	Expected Value
	Family fun survey (1-5)	Survey created on Survey Monkey	1 day post trip end	0	4
	Souvenirs	Stadium Fan Stores	2 months	0	30

Phase 1: Initiation is Complete When...

Initiation

- Project Charter Lite is approved
- Initial project management meeting with your sponsor has been held
 - Establish project management approach, i.e. meeting cadence
 - Chose scoping and scheduling advisors
 - Determine when key Phase 2 Planning activities will occur

Phase 2



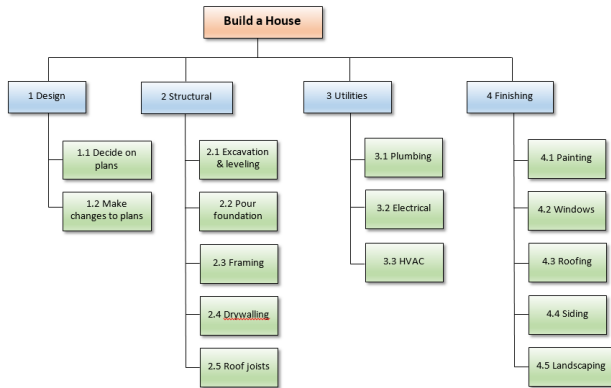
Planning

Project Schedule

- A Project Schedule is a listing of the project's milestones, activities, and deliverables, with intended start and finish dates along with resource (people) assignments
- The Project Schedule is your #1 Project Management Lite tool and should be thoughtfully constructed
- The Project Schedule can be **progressively elaborated** upon throughout the project, but once it is **baselined** changes to the start and end dates require approval
- The Project Schedule and associated resource plan will be developed

Evolution of a Project Schedule

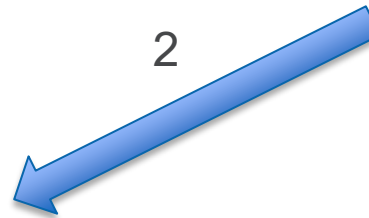
Work Breakdown Structure (WBS)



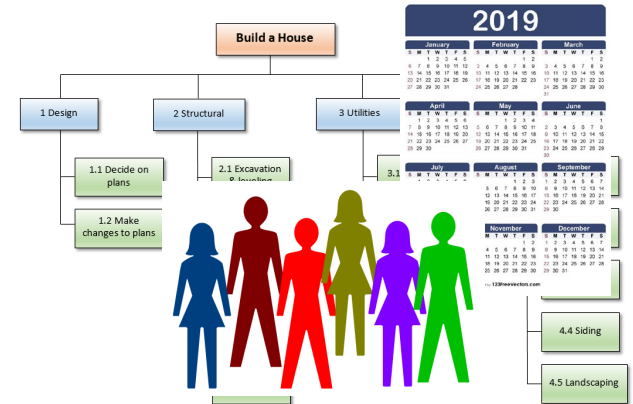
1



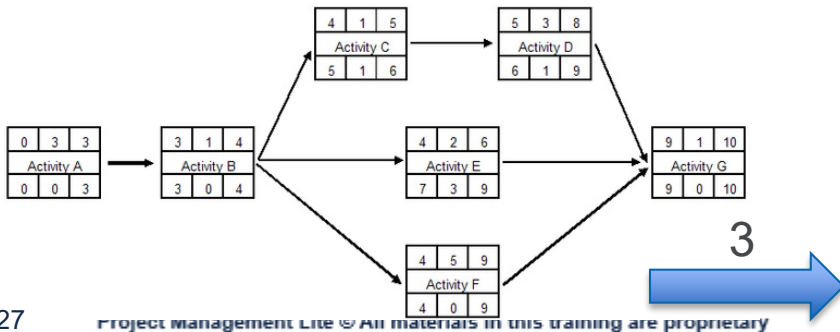
2



WBS with Time and People



Sequenced WBS (Network Diagram with Critical Path)



Resource-Loaded, Baseline Schedule

Project: UCSDH - IS CARE Test Project - Effort - Gantt

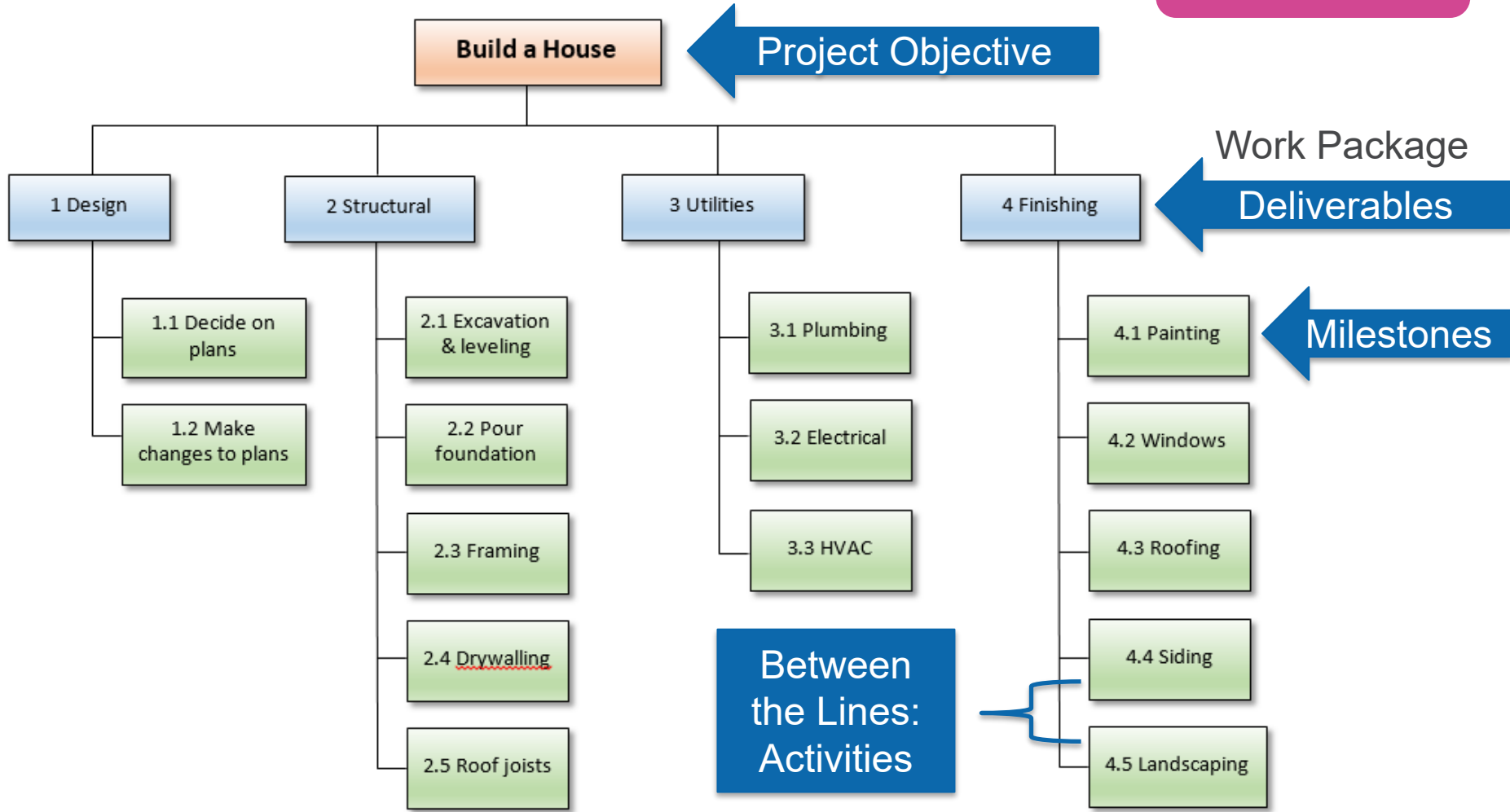
Filter: System Default

Task	Assigned Resources	Start	Finish	Durati...	Status	% Compl...	Acti
Test Program Manager Task	Herman, Zach	7/8/19	7/12/19	5	Started	0%	7/29/19
Test task 2		8/1/19	8/15/19	11	Not Start...	0%	
Test task 3		8/16/19	8/30/19	11	Not Start...	0%	

Work Breakdown Structure

Phase 2

Planning



Translating your WBS into a Schedule

- Estimate the time to complete the Milestones
 - The time to complete a Deliverable will be the sum of all of its Milestones
 - The time to complete the Project will be the sum of all of the Deliverables
 - Build in some contingency time (+/- 10%)
- Assign people to complete the Milestones
- Order the Deliverables and Milestones
 - Are there dependencies between the Deliverables or Milestones?
 - If yes, those Deliverables or Milestones must be done in sequence
 - If no, those Deliverables or Milestones can be done in parallel

Pro Tips

- Progressive Elaboration: *Without necessarily changing the total duration of the Milestone*, add time-bound, resource-loaded Activities to complete the Milestones
- Schedules should be architected to follow the 5 Project Phases and to include project management activities, such as:
 - Artifact development and sign-off
 - Phase Gate reviews (to be discussed)
 - Communication deliverables
 - Meetings
 - Status report and activity log due dates

Schedule

Phase 2

Planning

Task
<input type="checkbox"/> - Level 1 Project Schedule Template
<input type="checkbox"/> + Intake
<input type="checkbox"/> + Assessment
<input type="checkbox"/> + Initiating
<input type="checkbox"/> + Planning
<input type="checkbox"/> + Monitoring and Controlling
<input type="checkbox"/> + Executing
<input type="checkbox"/> + Closing

Task	Assigned Resources	Start	Finish
<input type="checkbox"/> - Infrastructure and Technology Level 1 Project Sche		7/1/19	7/3/19
<input type="checkbox"/> + Intake		7/1/19	7/1/19
<input checked="" type="checkbox"/> + Assessment		7/1/19	7/1/19
<input type="checkbox"/> + Initiating		7/1/19	7/1/19
<input type="checkbox"/> + Planning		7/1/19	7/1/19
<input type="checkbox"/> - Executing		7/1/19	7/3/19
<input type="checkbox"/> - Design		7/1/19	7/1/19
<input type="checkbox"/> - Technical Design		7/1/19	7/1/19
<input type="checkbox"/> Draft Design		7/1/19	7/1/19
<input type="checkbox"/> Review Design		7/1/19	7/1/19
<input type="checkbox"/> Sign Off of Technical Design		7/1/19	7/1/19
<input type="checkbox"/> Circulate for Review and Feedback		7/1/19	7/1/19
<input type="checkbox"/> Design Approved		7/1/19	7/1/19
<input type="checkbox"/> - Development		7/1/19	7/1/19
<input type="checkbox"/> Procure Hardware / Software		7/1/19	7/1/19
<input type="checkbox"/> Install / Develop Solution - Developer		7/1/19	7/1/19
<input type="checkbox"/> - Testing Phase		7/1/19	7/1/19
<input type="checkbox"/> Validate User Requirements		7/1/19	7/1/19
<input type="checkbox"/> Execute User Acceptance Testing		7/1/19	7/1/19
<input type="checkbox"/> UAT Completed / Approve		7/1/19	7/1/19
<input type="checkbox"/> Execute Change Control		7/1/19	7/1/19
<input type="checkbox"/> Go Live Communication		7/1/19	7/1/19
<input type="checkbox"/> Production Go-Live		7/1/19	7/1/19
<input type="checkbox"/> User Training		7/1/19	7/1/19
<input type="checkbox"/> Post Production		7/1/19	7/3/19
<input type="checkbox"/> + Closing		7/1/19	7/1/19

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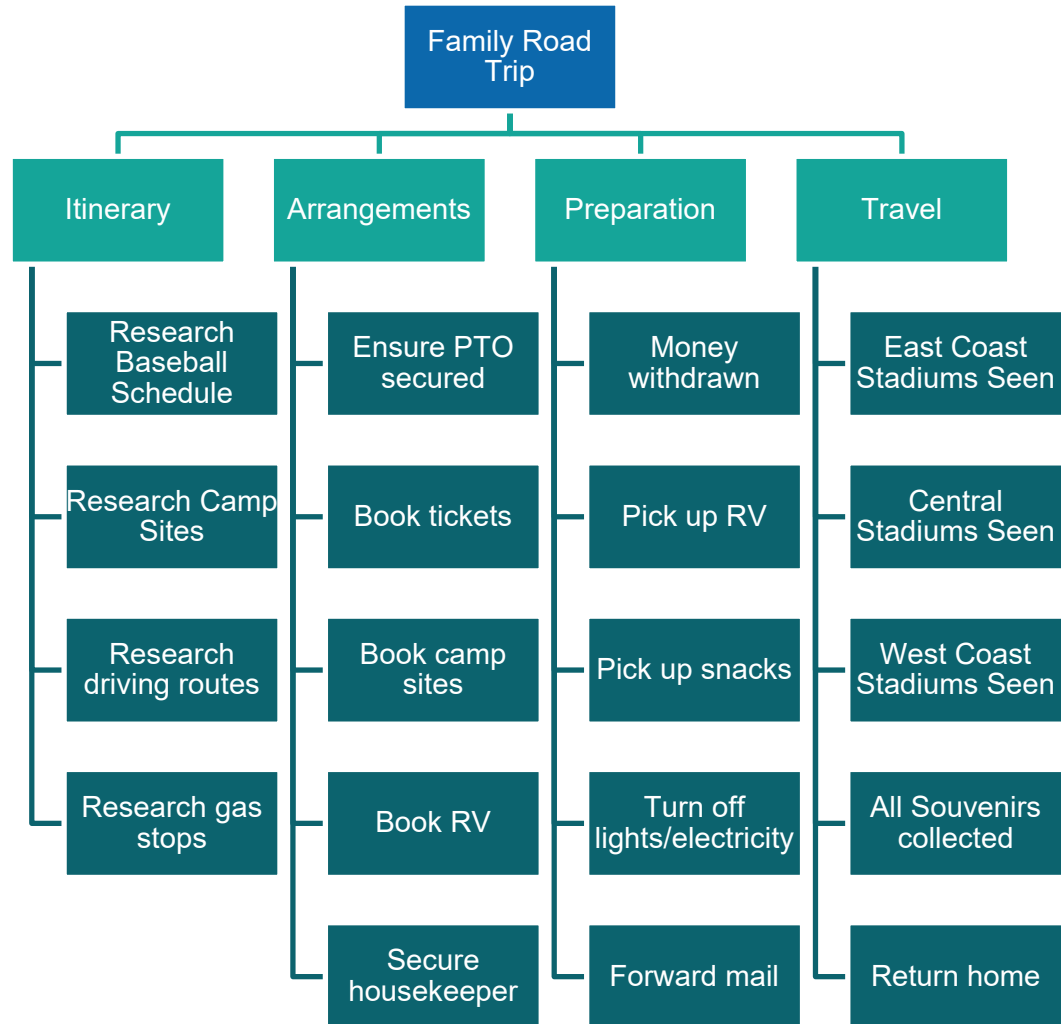


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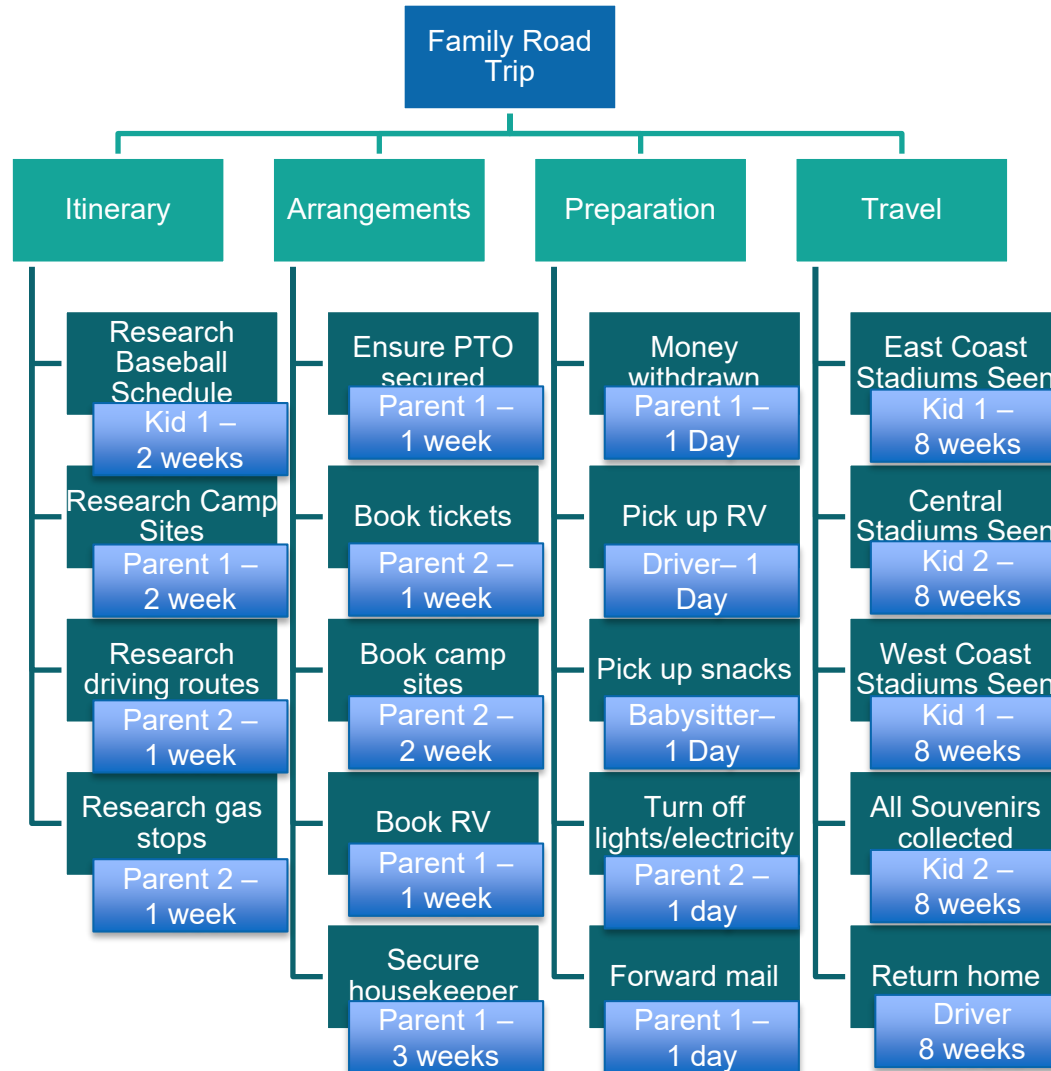
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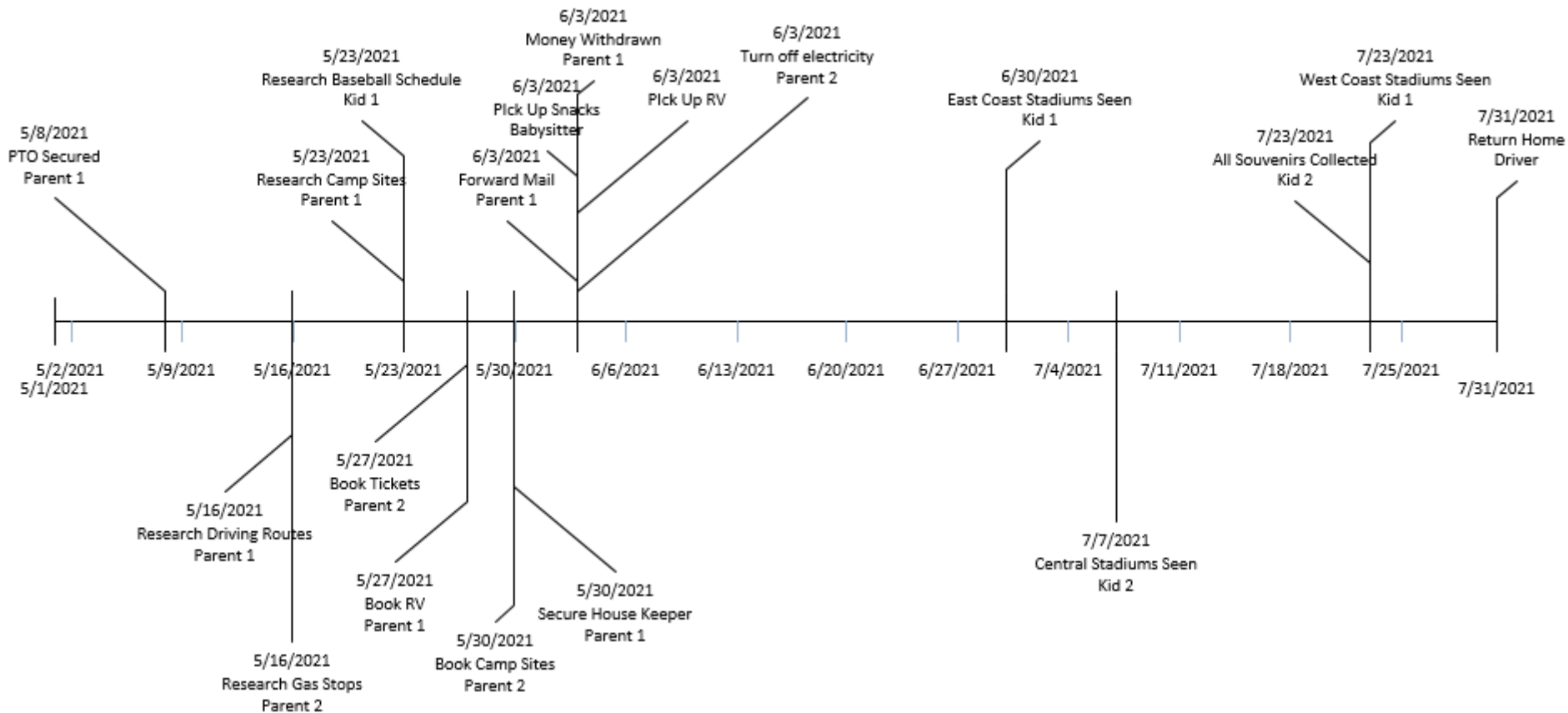
Project Management Lite Case Study: Family Road Trip



Project Management Lite Case Study: Family Road Trip



Project Management Lite Case Study: Family Road Trip



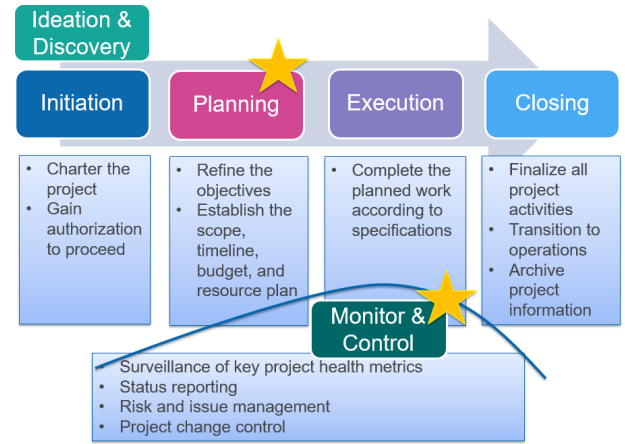
Phase 2: Planning is Complete When...

Planning

- Your Schedule is built
- Resources have been requested and released to your project (to be discussed)
- Your project artifacts are updated and stored
 - You may need to revise and get re-approval of your Project Charter
 - You may need to add members to your roster *and onboard them*
- You have a Kick-Off meeting with whole team and they agree to the plan
- Your Leader and the Customer agree with Schedule and Communication Plans
- Requires a **Phase Gate Review** which is a formal process in which leadership and the customer give you the authority to proceed to Phase 3 of the project and document their agreement



Phase 3

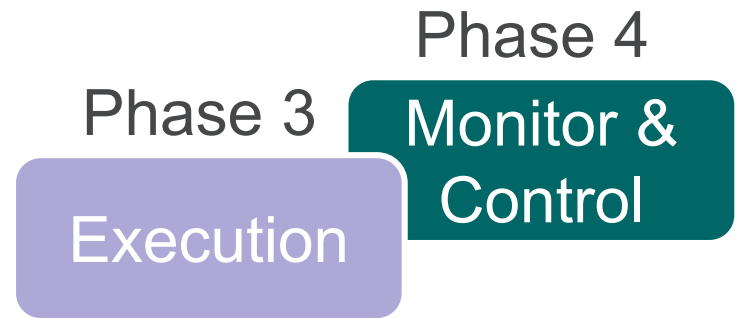


Phase 4

Execution

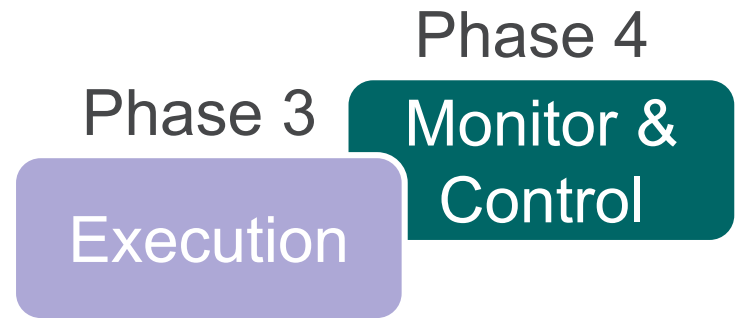
Monitor & Control

Project Status Report



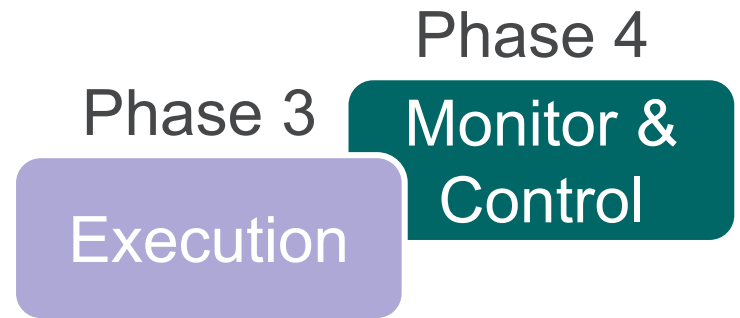
- Project status report should tell you everything you need to know about your project at a glance: activities in progress, scope change, date slippage and status of pertinent deliverables, etc.
- Project status reports should be released regularly (typically weekly in IS) either in a team meeting or in a team-wide email
- It is **IMPORTANT** that you are honest and transparent about status

Meeting Agenda and Minutes



- Meetings are used to discuss and address pertinent topics of the project when directing and managing project work
- Meetings should be prepared with a well-defined agenda and objective
- Attendees at the meetings may include the project manager, the project team and appropriate stakeholders involved or affected by the topics addressed
- Agendas and Minutes should be retained and archived
- Agendas and Minutes should inform:
 - Risk, Issue, and Escalation Documentation and Processed
 - Schedule Modifications
 - Status Reports

Meeting Tips and Etiquette



- Make sure you've updated your activity progress in your schedules so the status reports are accurate
 - Project Leads can't be babysitters
 - The light will shine
- Be solution-oriented, but be sure to speak up if there are risks
- Participate, even if it's just listening fully
- Engage in efficiency – 15 minute meetings might be sufficient and don't meet just to meet

Be Happy. Be Helpful. Be Humble. Be Honest.

Meeting Agenda and Minutes

Phase 4

Monitor & Control

Phase 3

Execution

<MEETING TOPIC>

<PROJECT>:<PROJECT SUBTEAM>

When: <dd mmm yyyy> <start> - <end>

Where: <physical location>
<Zoom information>

Invitees: <from Outlook invite>

Objective: The purpose of this meeting is ...

Pework:

Discussion

Documents:

AGENDA

Start	Topic	Facilitators

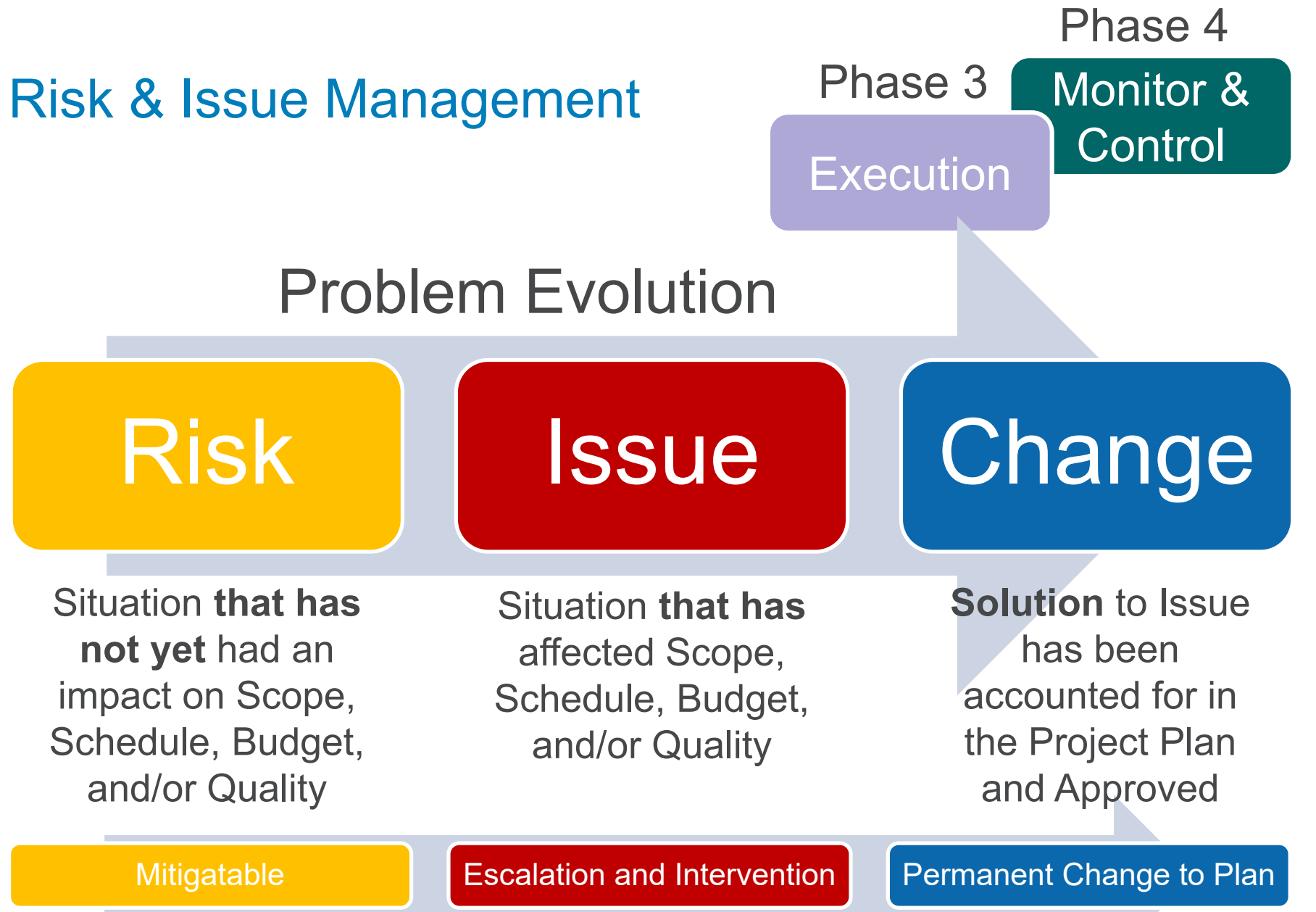
MINUTES

Topic	Minutes
<Topic>	1. <text> 1.1. <subtext> [D] Decision [A] Action Item [R] Risk [I] Issue 1.2. <subtext>

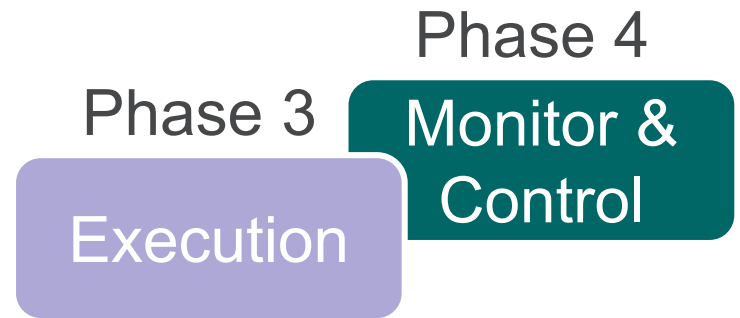
DECISIONS, ACTIONS, ISSUES, RISKS [DAIR]

ID	Item	Type	ECD	Notes/Conclusion
Alyyyymmdd.##	<description>	AI	yyymmdd	

Risk & Issue Management

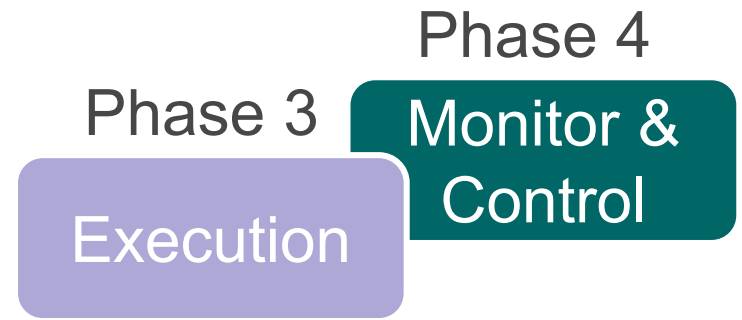


Risk & Issue Management



- It is the fiduciary duty of the Project Leader and Team Members to accurately and transparently report Risks and Issues
- Proper Risk and Issue Management protects the team and the organization
- Ideally, Risks are reported and mitigated before becoming Issues that require intervention and Change to the Project Plan
- The goal of Risk and Issue Management is to solve project problems effectively and in a manner that is acceptable to the organization

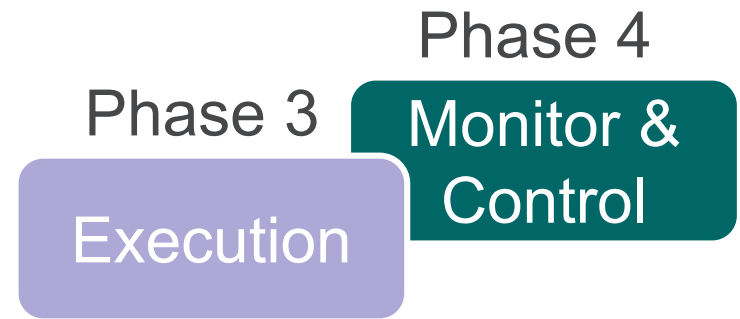
Escalation Pathway



Escalation proceeds to higher levels of decision-making authority to make change and potentially secure resources



Phase 3: Execution & Phase 4: Monitor and Control are Complete When...

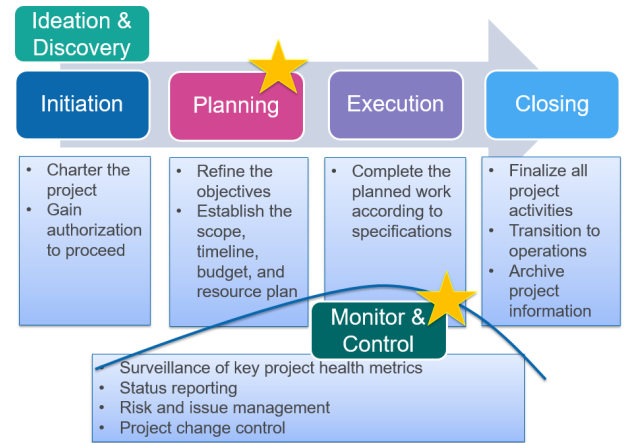


- All of the Deliverables and Objectives of the Project are complete
 - Refer to the Measures of Success in the Project Management Charter Lite
- The project has “Gone Live” and Go-Live support is complete
- Operations is ready to take the reins
- Your Leader and the Customer **accept** that all of the Deliverables and Objectives of the Project have been met
- Requires a **Phase Gate Review** which is a formal process in which leadership and the customer give you the authority to proceed to Phase 5 of the project and document their agreement



Phase 5

Closing



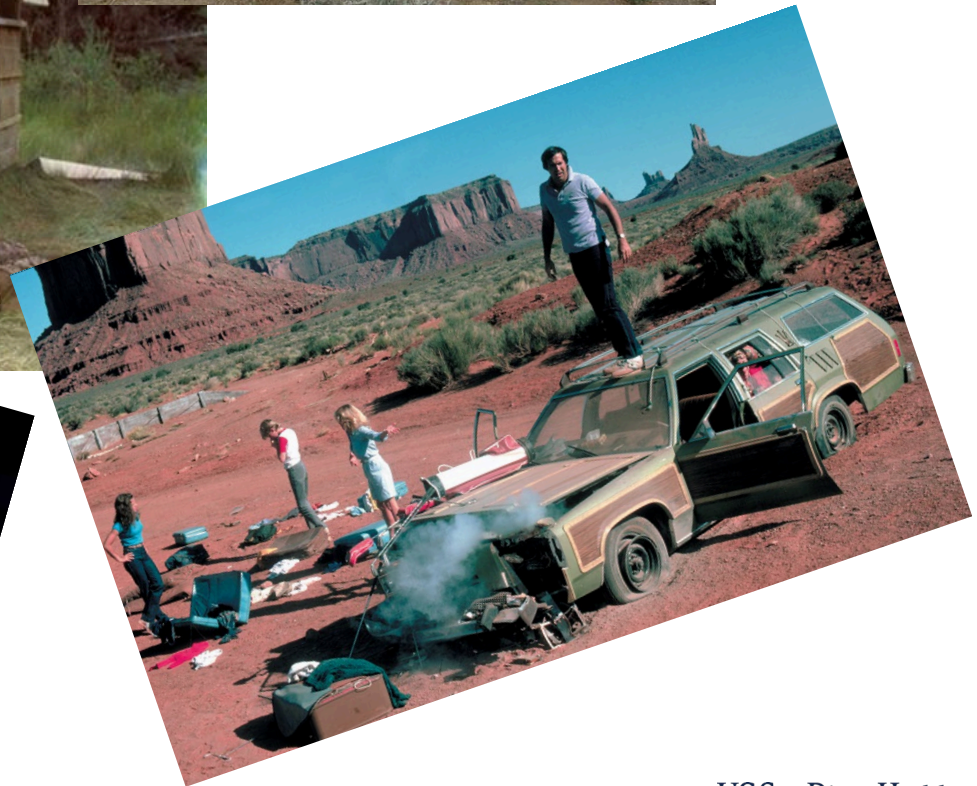
Lessons Learned Tips

- Lessons Learned information can be collected *throughout* the project
 - May be obtained from the Risk and Issues Log, Meeting Minutes and Project Status Reports
- The Project Lead should facilitate a Lessons Learned Meeting with the team and stakeholders within 4 weeks of the Phases 3&4 Phase Gate
- Lessons Learned may produce multiple outcomes, such as:
 - Recognition and rewards
 - Modifying project processes and/or templates
 - Improvement events or “Just do its”
 - Service recovery
- Lessons Learned information should be archived at closing in Planning as part of your risk log
- If you are leading a project, give yourself a boost and review Lessons Learned from previous, similar projects

Phase 5: Closing is Complete When...

- You have celebrated and acknowledged your team
- All project artifacts are archived
- Lessons Learned have been gathered, acted-upon and archived
- Project is officially closed

Road Trip Memories



What you Should Know...

