THE INSTANT PROJECT MANAGER

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BCNET

Who are we?

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How many of you are full time project managers?

Goals

- Review project management toolkit:
  - Simple project process
  - Project Plan
  - Communications
    - Issues template
    - Status update template
    - Change log/change management
    - Terms of Reference template
  - Team building
  - Closeout Report
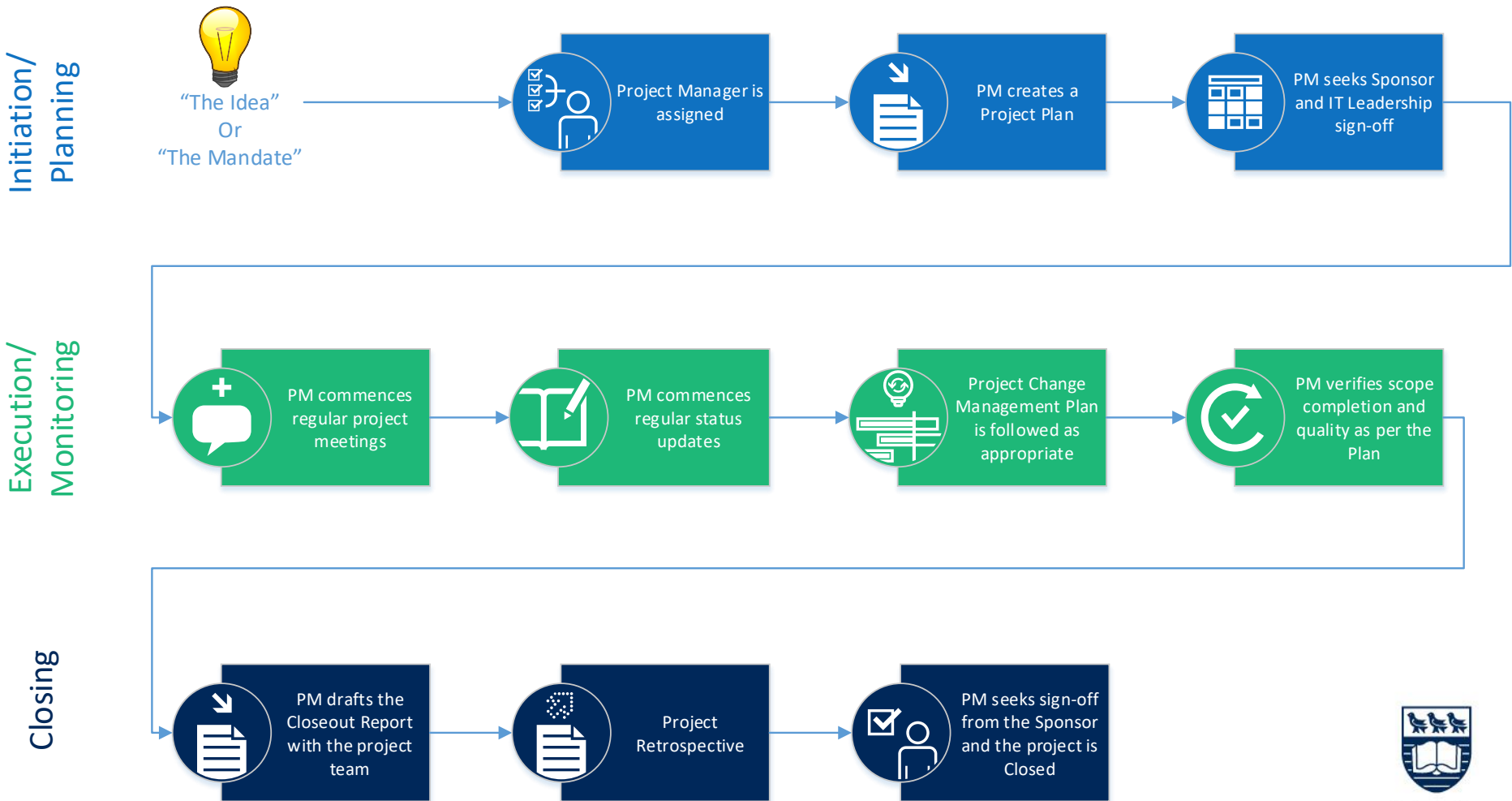- Provide our lessons learned
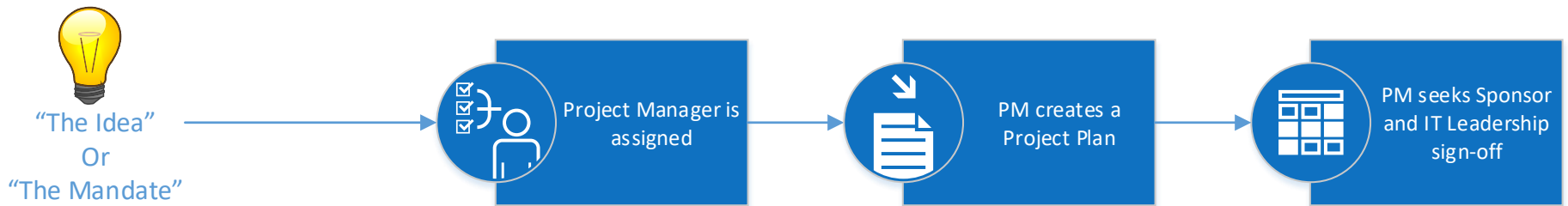
Project Roles

- Sponsor
  - Project champion, also shields project
  - Provides project with funding and resources
- Stakeholder
  - Affects or is affected by the project
- Project Team
  - Anyone who is resourced to complete the project
- Project Manager
  - Person accountable for making sure project activities are completed to support project success

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Simplified Project Process

Initiation/ Planning

"The Idea" Or "The Mandate"

- Project Manager is assigned
- PM creates a Project Plan
- PM seeks Sponsor and IT Leadership sign-off

Execution/ Monitoring

- PM commences regular project meetings
- PM commences regular status updates
- Project Change Management Plan is followed as appropriate
- PM verifies scope completion and quality as per the Plan

Closing

- PM drafts the Closeout Report with the project team
- Project Retrospective
- PM seeks sign-off from the Sponsor and the project is Closed

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Where are we in the story?

"The Idea"
Or
"The Mandate"

Project Manager is assigned

PM creates a Project Plan

PM seeks Sponsor and IT Leadership sign-off

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Project Plan

- What is a Project Plan?
  - Tool to communicate expectations
  - Developed with the project team
  - Agreement between stakeholders and the project team
- What makes a good Project Plan?
- Realistic
  - Clear and concise
  - Detailed for the scale of the project
- What is the audience of the Project Plan?
  - Project team and stakeholders

PROJECT PLAN TEMPLATE

Project Title	[[The name of the project]]
Project Sponsor	[[The Sponsor's name and title]]
Project Manager	[[The Project Manager's name]]
Total Effort	[[The total estimated project effort typically reported in person days or hours of effort]]
Total Budget	One Time: [[One time project costs]] Recurring: [[Recurring costs]]

1.0 PROJECT SUMMARY AND PURPOSE

[[Provide a summary of the project and justification for the project. What constitutes success for this project? How will success be measured?]]

2.0 SPONSOR, KEY STAKEHOLDERS, CLIENTS

SPONSOR: [[The person championing the project.]]

KEY STAKEHOLDERS: [[List those who impact or are impacted by this project. Consider resource managers, vendors, those who may provide sources of funding.]]

CLIENTS: [[Note the end users or clients of this project.]]

3.0 PROJECT SCOPE

[[Note what is in scope and what is out of scope of the project. You may wish to use a table like the one below. This should not be a list of every task required to complete the project, rather key deliverables that the Sponsor and key stakeholders should expect.]]

In Scope	Out of Scope

4.0 WORK BREAKDOWN STRUCTURE AND SCHEDULE

[[List all tasks required to complete project work and who will be performing (or assigning) the work. Once you have established the work that must be completed, develop a realistic schedule for that work. You may wish to use

What about the water?

What did we build?

- Understanding the problem, not jumping to solutions

  – User stories and requirements gathering

- Creation of a transition to operations plan
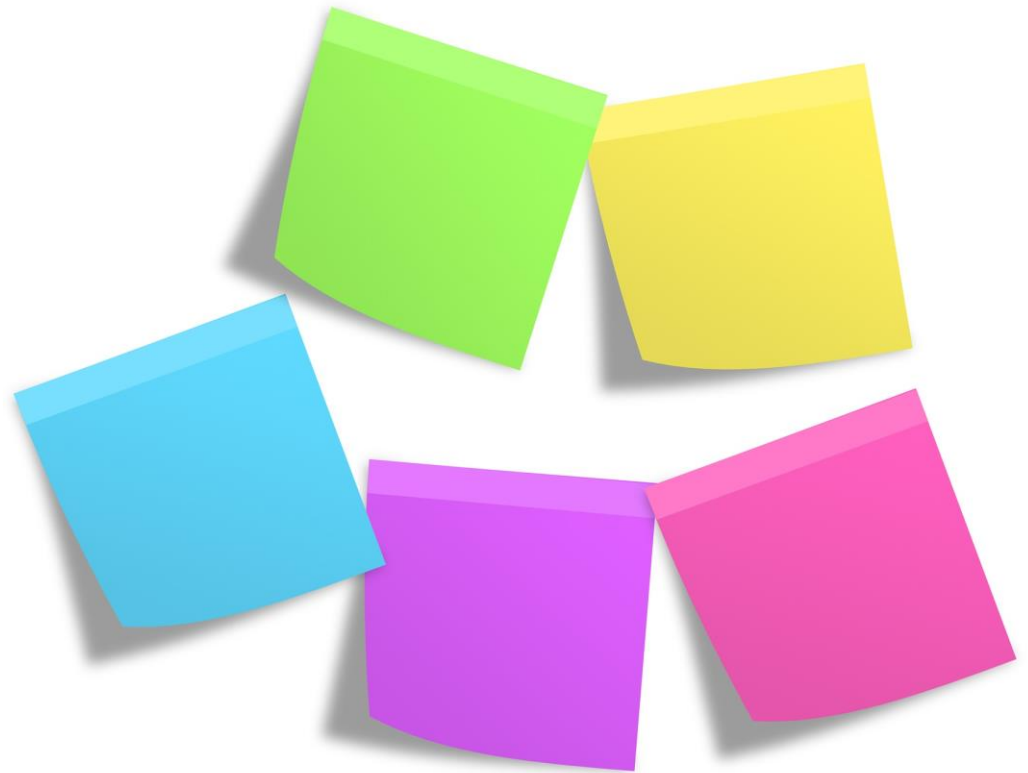
  – Clear support expectations

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User Stories

As a …

I want …

So that I can …

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User Stories

As a … Project Manager at UVic

I want … to present my experiences managing projects at UVic

So that I can … help others through similar project experiences

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User Stories

The old way:

Can someone pass me a Kleenex?

The new way:

User Stories!

User Stories

As a … a person who just spilled tea on myself

I want … an absorbent towel

So that I can … clean myself up easily

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User Stories

As a ... student

I want ... an easy and safe survey tool

So that I can ... gather information for my course assignments

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Where are we in the story?

PM commences regular project meetings → PM commences regular status updates → Project Change Management Plan is followed as appropriate → PM verifies scope completion and quality as per the Plan

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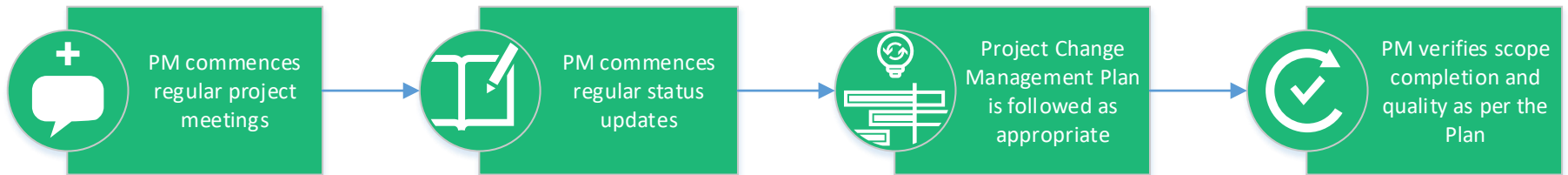
Communications

- Your job.
  - Seek communications support
- Communications Plan
  - How will you interact with your stakeholders and clients?
- Status update template
  - Follow up often
- Change log and decision log

Batteries not included

- Software as a Service
- Vendor Management
  - How will you interact with the vendor?
  - Exit strategy?
  - Decision log?
  - Change management? What is their release cycle?
  - Escalation Path?
- Use your network
- Vendor Project Management

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Team Building

- Kick-off meeting
- Regular stand-up meetings and check-ins
- Skype or Lync
- RACI Matrix

5.0 RESOURCE RESPONSIBILITIES

[[A RACI matrix is a helpful tool to summarize project responsibilities. Each task must have one and only one person/group who is ultimately accountable for the task.

Consider creating separate RACI matrices for project tasks and operational tasks after the project is complete. Revisit the responsibilities matrix often, especially when implementing new services and the service ownership model has not been fully defined.

R – Responsible for executing the task

A – Accountable for assigning the task and ensuring task completion

C – Consulted on the task (two-way communication)

I – Informed of the task (one-way communication)]]

Tasks/Responsibilities	Person/Group 1	Person/Group 2	Person/Group 3
Project Management	R,A	I	I
Software Development	I	R,A	C
Code Review	C	R,A,C	
User Acceptance Testing	A	C	R
End User Training	A	C	R

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LESSON LEARNED #3
Who's the Boss?

- Having the right Sponsor
- Steering Committee
  - Terms of Reference
  - How will decisions be made?
- Service ownership
  - Who are we building this for? Who are the stakeholders?
  - Service Level Commitment/Service Level Agreement

TERMS OF REFERENCE TEMPLATE
LAST UPDATED [[DATE]]

1.0 PURPOSE
[[State the purpose and scope of the committee or sub-committee.]]

2.0 COMMITTEE FUNCTIONS & RESPONSIBILITIES
[[List the functions of the committee and examples of projects and initiatives that will be reviewed.]]

3.0 MEMBERSHIP & MEMBER RESPONSIBILITIES
[[List all members of the committee and whether or not they are voting members. Consider and document whether members have a responsibility to consult with or represent groups outside of the committee. State any member responsibilities for reviewing documents, researching initiatives, and attending meetings.

Feel free to add and remove columns and rows to the table below as appropriate.]]

Name	Position Title	Role
		Chair (non-voting)
		Voting member
		Voting member
		Provide input (non-voting)
		Observer (non-voting)

4.0 MEETINGS
[[State the meeting frequency and how meetings will be managed. If the committee meets electronically, state the medium that will be used and any other communication methods that members should expect.]]

5.0 REPORTING
[[State which parent committees this committee reports to and any sub-committees that report to this committee. Also define how committee work will be documented and communicated to other committees.]]

Where are we in the story?

Closeout Report

- What did the team do well?
- What would you do differently next time?
- Involve the team
- Sign-off

Instant Project Manager Package

https://tinyurl.com/instantprojectmanager