PROJECT MANAGEMENT FOR NON-PROJECT MANAGERS

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AGENDA

- What is **Project Management**?

- Formal Project Management

- How much Project Management is required?

- **Formal** vs **Flexible** Project Management

- **Examples** of Project Management deliverables

- Summary and contact info

WHAT IS PROJECT MANAGEMENT?

- Definition

  - *"Project Management is the application of knowledge, skills, tools and techniques to project activities to meet the project requirements."* —PMBOK, Fourth Edition

- PM is considered a formal field of practice

  - PMI certification

  - Training, testing, CEUs and recertification

  - Valuable, but expensive and time-consuming

  - What's it like to get certified as PMP

  - Often rely on common sense and intuition combined with the formal process

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FORMAL PROJECT MANAGEMENT

- **Project lifecycle**
  - What work must be accomplished
  - What deliverables must be generated and reviewed
  - Who must be involved
  - How to control and approve each phase

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FORMAL PROJECT MANAGEMENT

- PMBOK knowledge areas

  – Project **Integration** Management

  – Project **Scope** Management

  – Project **Time** Management

  – Project **Cost** Management

  – Project **Quality** Management

  – Project **Human Resource** Management

  – Project **Communications** Management

  – Project **Risk** Management

  – Project **Procurement** Management

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FORMAL PROJECT MANAGEMENT

Figure 6-1. Project Time Management Overview

FORMAL PROJECT MANAGEMENT

Figure 6-13. Develop Schedule Data Flow Diagram

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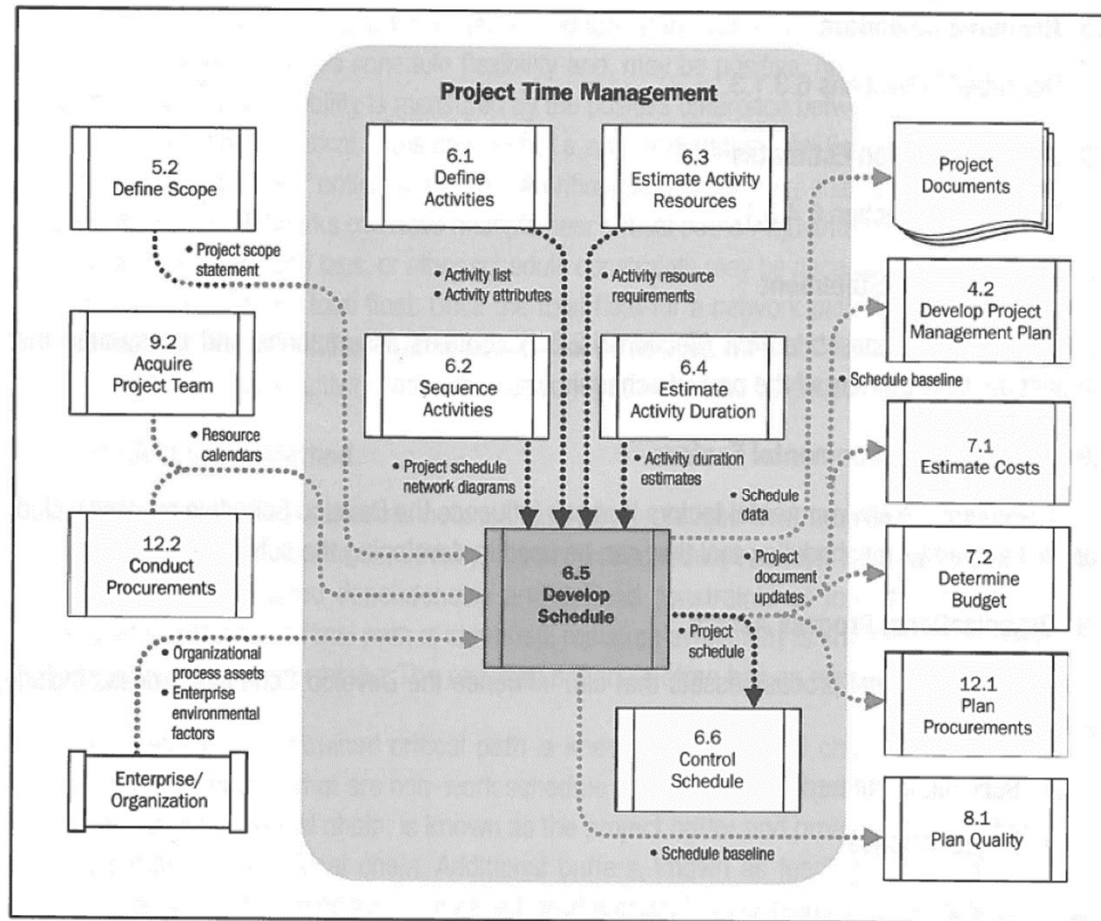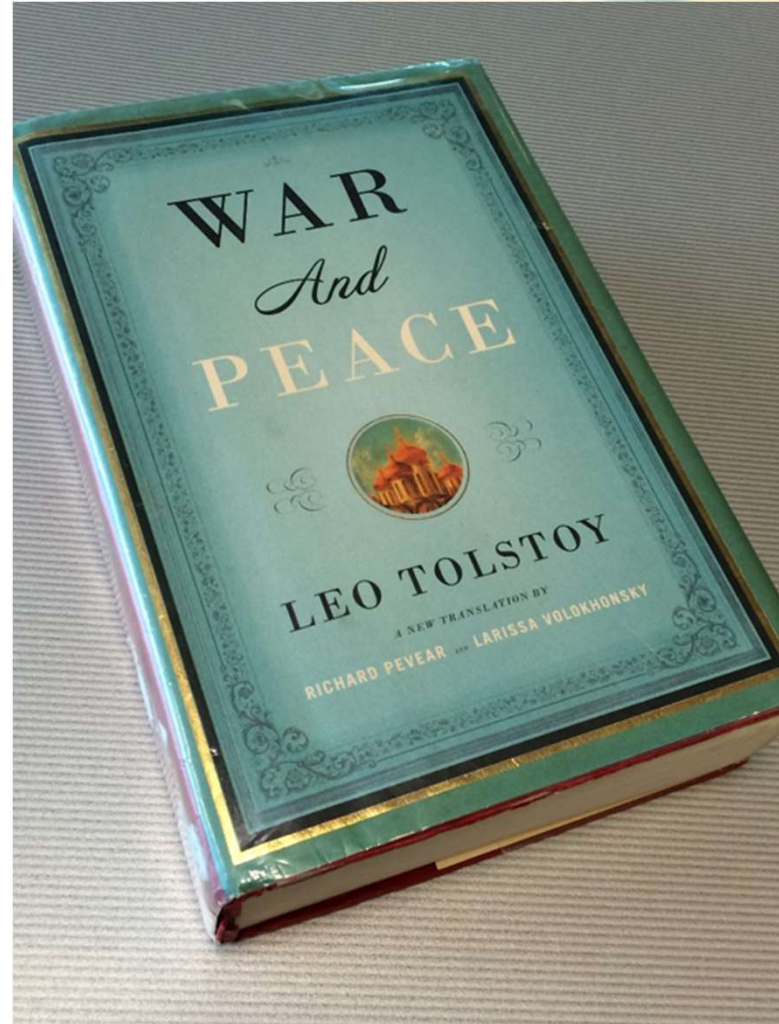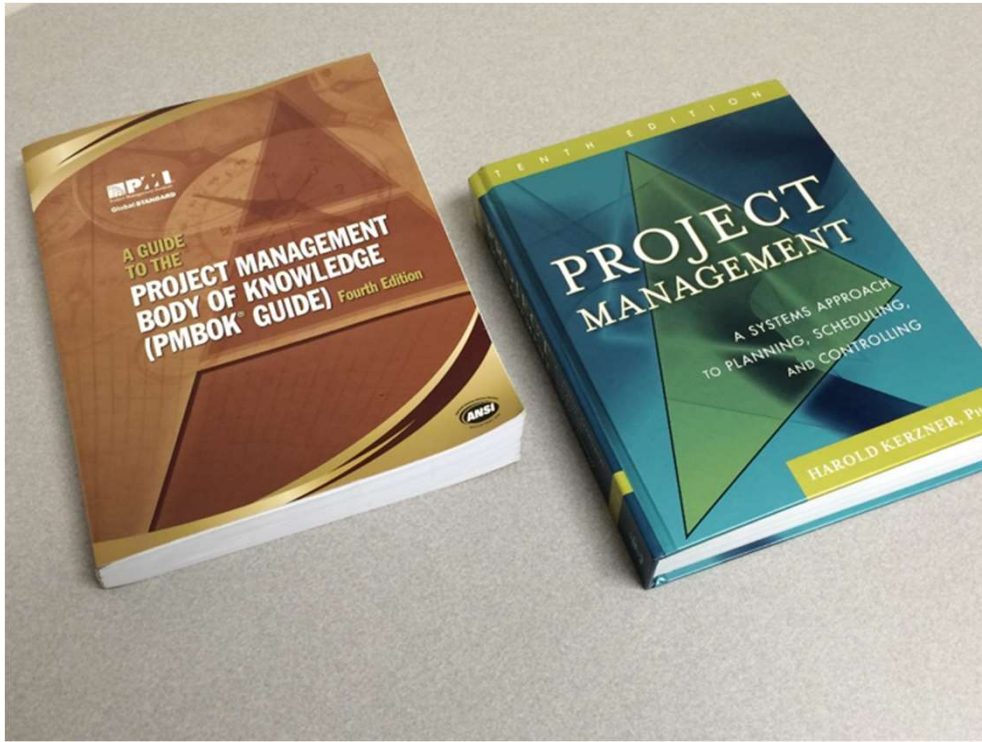
FORMAL PROJECT MANAGEMENT

- PM can be highly complex
  - It is possible to simplify the process
  - See the PMO office
    - Might not have this luxury…
    - If not...

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HOW MUCH PM IS REQUIRED?

- Determined by scope of project

- Formal full blown approach not always required

- **Why bother at all?**

  – It's possible to implement PM without going over the top

  – Basic tools and understanding of the PM process may be all that's necessary

PROJECT FLOW

- Professional and Social Responsibility

- Initiating

- Planning

- Executing

- Monitoring and Controlling

- Closing

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HOW MUCH PM IS REQUIRED?

Area of PM	Traditional waterfall project	Straightforward and short term project	Agile/innovation/my latest crazy idea
Scope	Well known	Well known	High level agreement
Resources	Available	Available	Limited
Duration	Long term	Short term	Short term
Risk	Low risk	Low risk	High risk
Project Manger	PM or other Manager	Team Lead	Varies, but often Team Lead
PM Method	Formal PM	Flexible PM	Flexible PM

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FLEXIBLE PROJECT MANAGEMENT
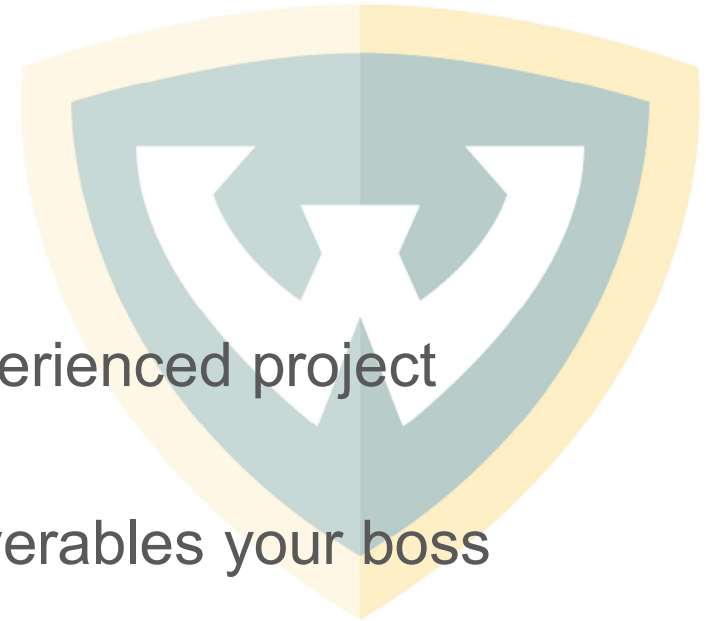
- Easier and faster for those who are not experienced project managers

- Simplify as required… Provide the PM deliverables your boss wants in a mechanism that works for you...
  - **Email, Word document, SharePoint, Ticketing system**
  - Some form of **written documentation** that you can refer to later

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FLEXIBLE PROJECT MANAGEMENT

- The minimum PM deliverables required by WSU IOPS are:
  - Project request/approval
  - Project Plan
  - Issue Log
  - Status Updates
  - Budget Tracking

FORMAL VS FLEXIBLE PM DELIVERABLES

PM Deliverable	Formal PM	Flexible PM
Project request and approval	Project Charter identifying scope, budget, resources, etc. Approved by sponsor.	Simple written statement. Approved by your boss
Project plan	Formal project plan	Simple – Excel, bullet list, etc.
Issue Log	Formal issue log	Simple – Excel, bullet list, ticketing system, etc.
Status Reports	Formal tracking mechanism	Simple - Email, SharePoint, etc.
Budget tracking	Formal tracking mechanism	Simple– Excel, email, etc.

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FORMAL VS FLEXIBLE UPDATE SCHEDULE

- **Formal PM**

  – **Weekly** written formal updates, often reviewed in person at Oversight meetings or sponsor meetings

- **Flexible PM**

  – At WSU IOPS, provide some form of written updates **1-2 times a month** or whenever a significant event occurs

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PROJECT REQUEST AND APPROVAL

- Project charter or written statement
  - Very important — **initiating document**
  - Description of the **business need** the project will meet
  - Description of the **product** resulting from the project
  - Makes project legitimate
  - Makes PM's role legitimate
  - Sets the target for the project
  - Typically only done once at the start of the project

PROJECT CHARTER

Project Charter

Project Name: **VoIP Transformation**

Project Sponsor:
Project Leader:
Project Start:
Project End:

Project One-time Budget:
Project Recurring Budget:

Prepared by:
Date Prepared:

_____

Problem Statement

Project Scope/Status

Major Project Objectives

Approach

Deliverables

Key Stakeholders

Resources required

Personnel

Assumptions

Constraints

Risks

C&IT Network Services ◊ 5925 Woodward ◊ Detroit, MI 48202-3555 ◊

PROJECT PLAN

- List of tasks with duration and dependencies
- Shows deliverables and resources
- May or may not include milestones

EXAMPLE PROJECT PLAN
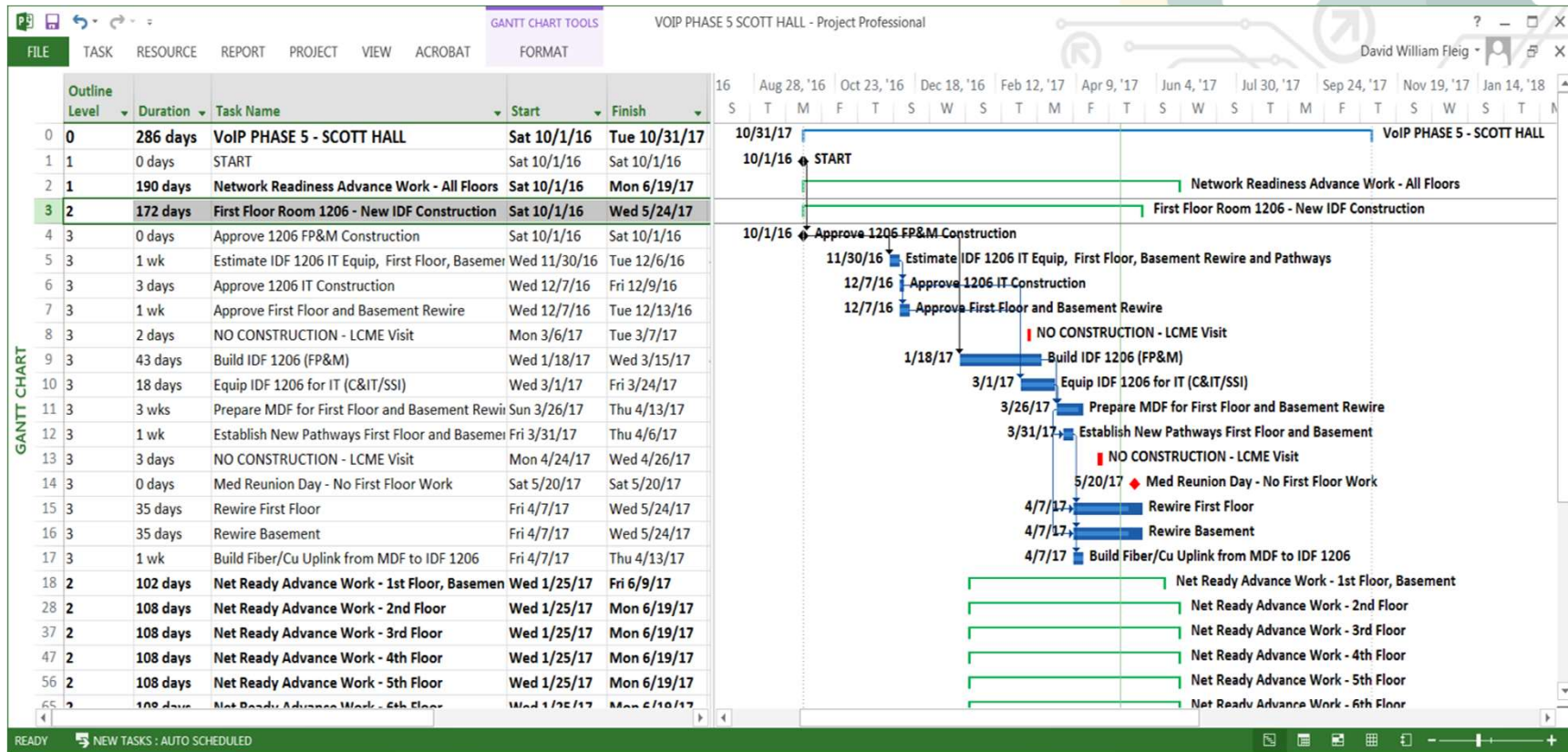
PROJECT PLAN - HIGH LEVEL
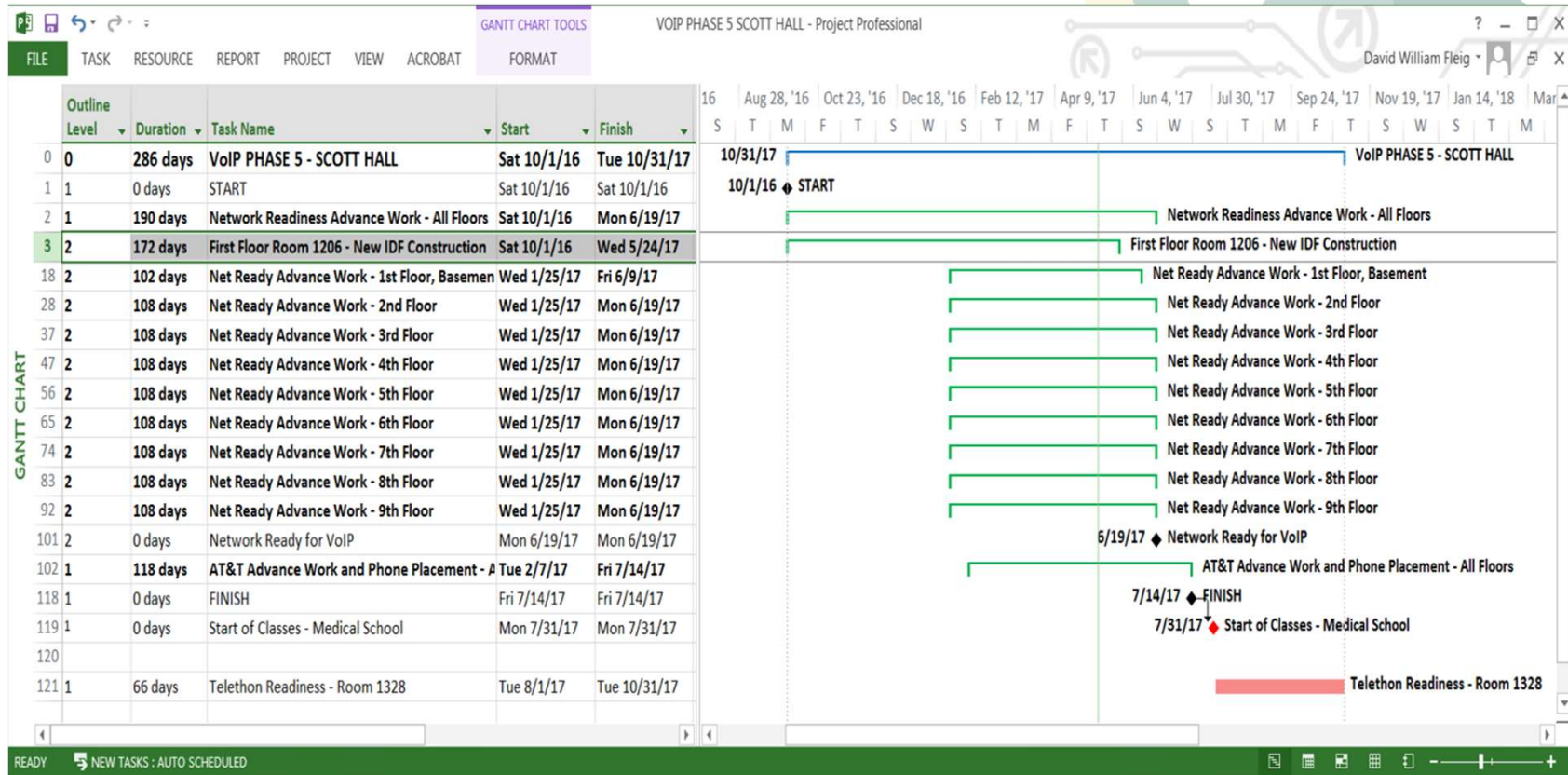
PROJECT PLAN - MILESTONES

VOIP High Level Milestones Rev A

ID	Duration	Task Name	Start	2015	2016	2017
				Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4	Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4	Qtr 1 | Qtr 2 | Qtr 3 | Qtr 4
0	401 days	Voice Transformation 2014	Fri 5/15/15			
1						
2						
3	0 days	VoIP Deployment – Phase 0 (C&IT)	Fri 5/15/15	◆ VoIP Deployment – Phase 0 (C&IT)		
4	0 days	VoIP Deployment – Phase 1	Fri 7/31/15	◆ VoIP Deployment – Phase 1		
5	0 days	VoIP Deployment – Phase 1.5 (AAB, Macat	Mon 11/30/15	◆ VoIP Deployment – Phase 1.5 (AAB, Macabbees, FAB)		
6	0 days	VoIP Deployment – Phase 2	Fri 3/11/16		◆ VoIP Deployment – Phase 2	
7	0 days	VoIP Deployment – Phase 3	Fri 7/29/16		◆ VoIP Deployment – Phase 3	
8	0 days	VoIP Deployment – Phase 4 (mostly SOM)	Wed 11/30/16		◆ VoIP Deployment – Phase 4 (mo	

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PROJECT PLAN - OUTLOOK

ACTIVITY/RESOURCE TRACKING TOOLS

ISSUE LOG

- Especially important in project with little precedent or many unknowns

- Risk Register: Can be combined with Issue Log

- Require input/decision from management

- Items that are technically complex and/or can't be easily addressed

ISSUE LOG

STATUS REPORTS

- *This is one of the most important PM activities!*
- Updates need to be at 1-2 times a month or whenever significant events occur
- Keep it **straight forward** and **brief**
- **BLUF**: Bottom line up front

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STATUS REPORTS

VoIP Executive Oversight Meeting Agenda

Date/Time of Session: March 15, 2016

1) Project Updates

   a) Phase 2 Outstanding items
      i) 12 incidents & 10 Service requests
      ii) Dave Foote assistance to create a single VOIP support group
      iii) Centrex lines are still active (not disconnected by AT&T)
      iv) WDET Newsroom
      v) Missing Phantom lines issue, workaround in place

   b) Phase 3
      i) Change in go live date – August or September?
      ii) Campus phones/Red safety phones
      iii) Move Scott Hall and DMC buildings to Phase 4
         (1) Coordination issues with SOM & DMC
         (2) Time required to update Scott Hall
         (3) Scott Hall (400) and DMC (6 buildings 550 new stations). New total for VOIP project is ~7100 stations

2) Budget
   a) PCR 360 ($75k one time, $40/yr recurring)

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BUDGET TRACKING

- Needs to include:
  - Approved budget
  - Actual amount spent to date
  - Project expenses
  - Amount over/under budget
  - Format for finance
  - Reconcile frequently (monthly)
  - Accounting info

BUDGET TRACKING
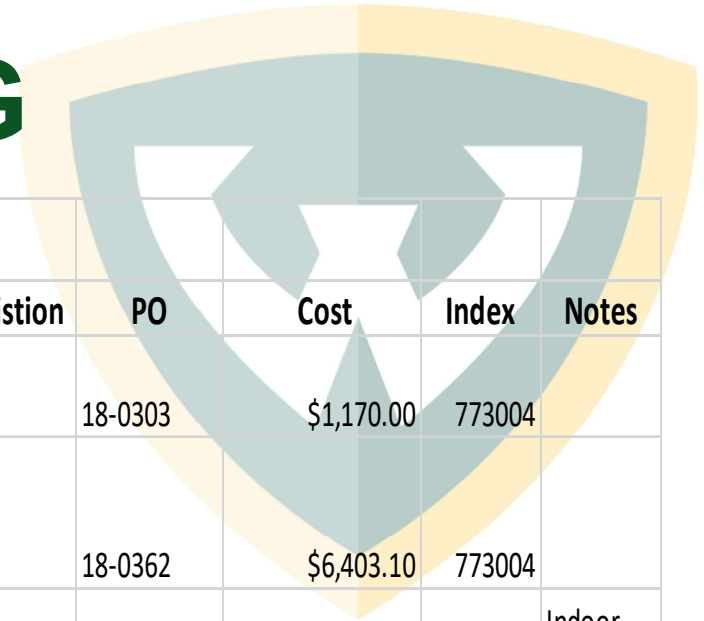
Expenses to date - Detail									
Date	**Category**	**Contractor**	**Description**	**TSR**	**Requistion**	**PO**	**Cost**	**Index**	**Notes**
3/13/2018	Wireless APs and Cabling - Campus	SSI	Replace existing access points in Computer Center	E34734		18-0303	$1,170.00	773004	
3/13/2018	Wireless APs and Cabling - Campus	SSI	Install 10 additional data drops and APs in Computer Center	E34760		18-0362	$6,403.10	773004	
3/26/2018	Wireless APs and Cabling - Campus	AI	APs, licenses and accessories		100661829		$58,029.70	773004	Indoor and Outdoor
3/30/2018	Wireless APs and Cabling - Campus	AI	AP's licenses, accessories		101327914		$23,199.95	773004	Matthaie Athletic Complex
						TOTAL	**$88,802.75**		

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USE THESE

- Simplify as required…
  - Project Request and Approval
  - Project Plan
  - Issue Log
  - Status Reports
  - Budget Tracking
  - Close Out and Review
  - Lessons

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NOT THESE

Figure 6-1. Project Time Management Overview

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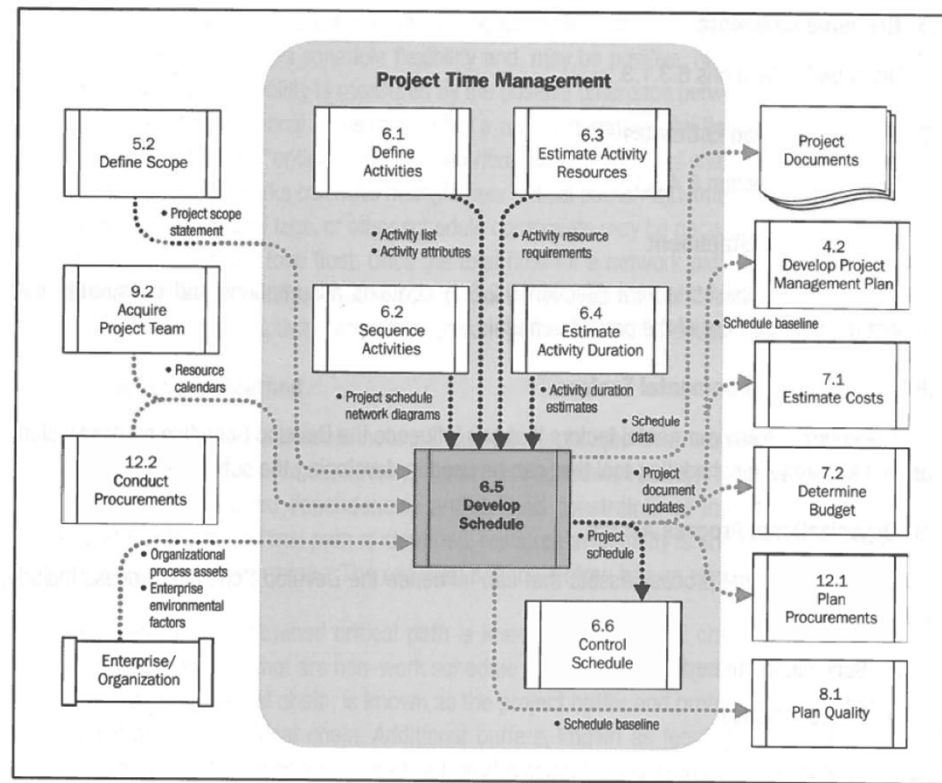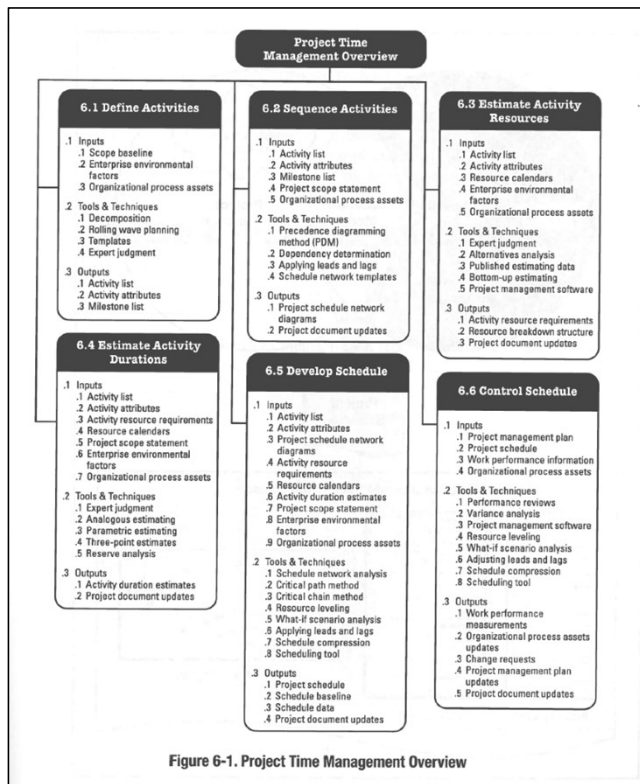
TALK TO YOUR MANAGEMENT

- What PM deliverables?

- How often are updates needed?

- What formats are ok?

TEAM BUILDING

- Success Breeds Confidence

- Running Smooth? *Let it continue*

- Management: Take chance and delegate

- Scary: When **$$$** and **time** are involved

- Requires oversight, but not too much

- Let success build upon itself

  – Careful: Don't micro-manage

  – Confidence follows

TEAM AND STAFF SUPPORT

- Simple things, like ensuring basic inventory and tools are provided

- Help one another

- Value individual contributions

- Involve the staff and team members

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COMRADERY

- **Team building**

    - Going out for pizza and beer is fun…

    - Working together toward a common goal

    - Acknowledging/sharing successes

    - Works better

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DISSEMINATE THE INFO

- **Share everything**
  - Budget
  - Schedule
  - Purchasing
  - Planning
  - Accountability…

- **Why?**
  - Involvement
  - Understanding

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CULTURAL CHANGE

- Consider as a project deliverable

- Somewhat intangible

  –Part of **Lessons Learned**

  –Still evolving

- Determine need in advance

  –Cultural change necessary, desirable?

- Give it a **try**…

THANK YOU!

Contact us:

- David Fleig, PMP
Project Manager, C&IT
david.fleig@wayne.edu