

PROJECT MANAGEMENT FOR NON-PROJECT MANAGERS



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

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

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

FORMAL PROJECT MANAGEMENT



Figure 6-1. Project Time Management Overview

FORMAL PROJECT MANAGEMENT

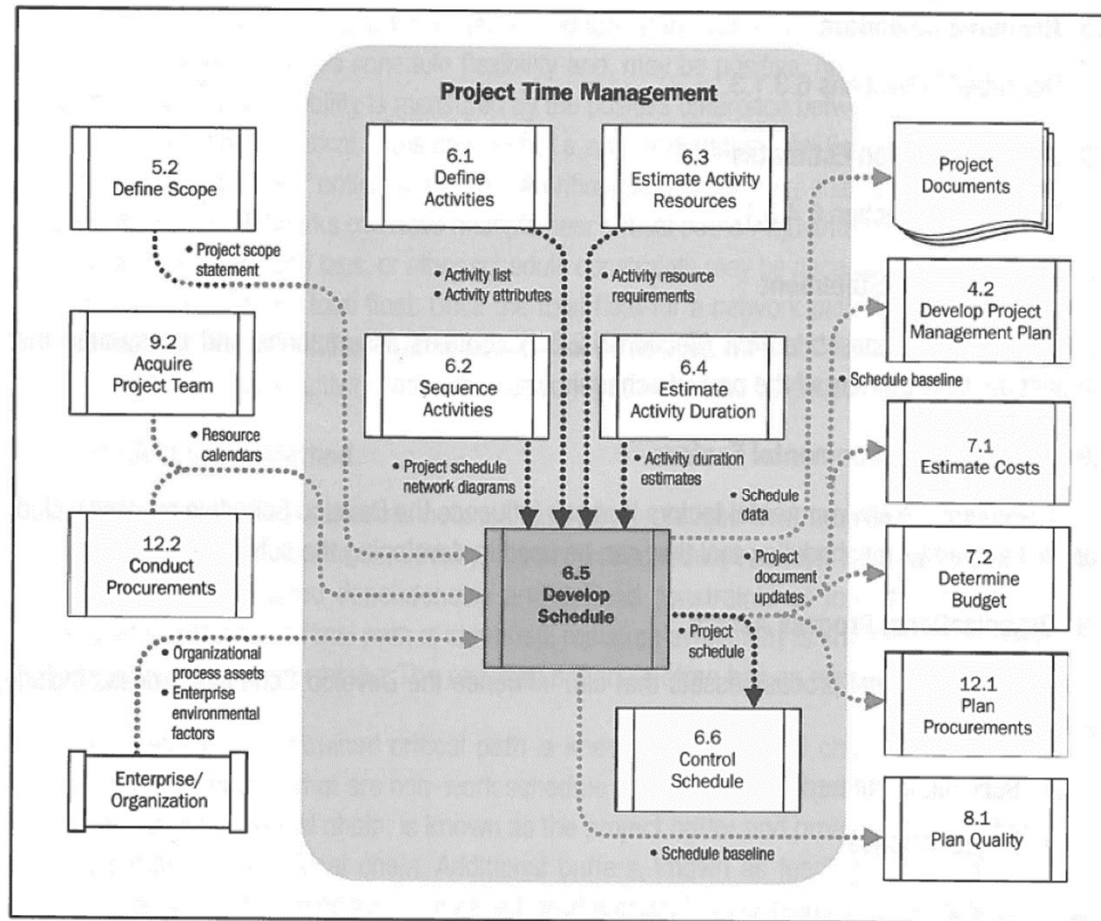
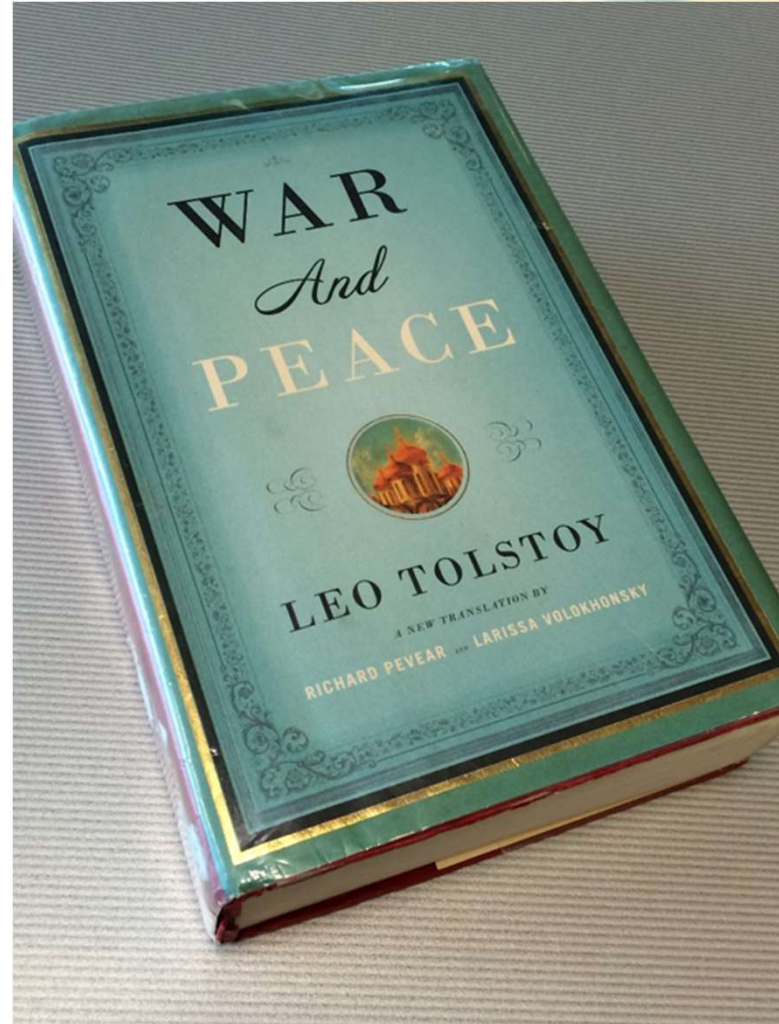
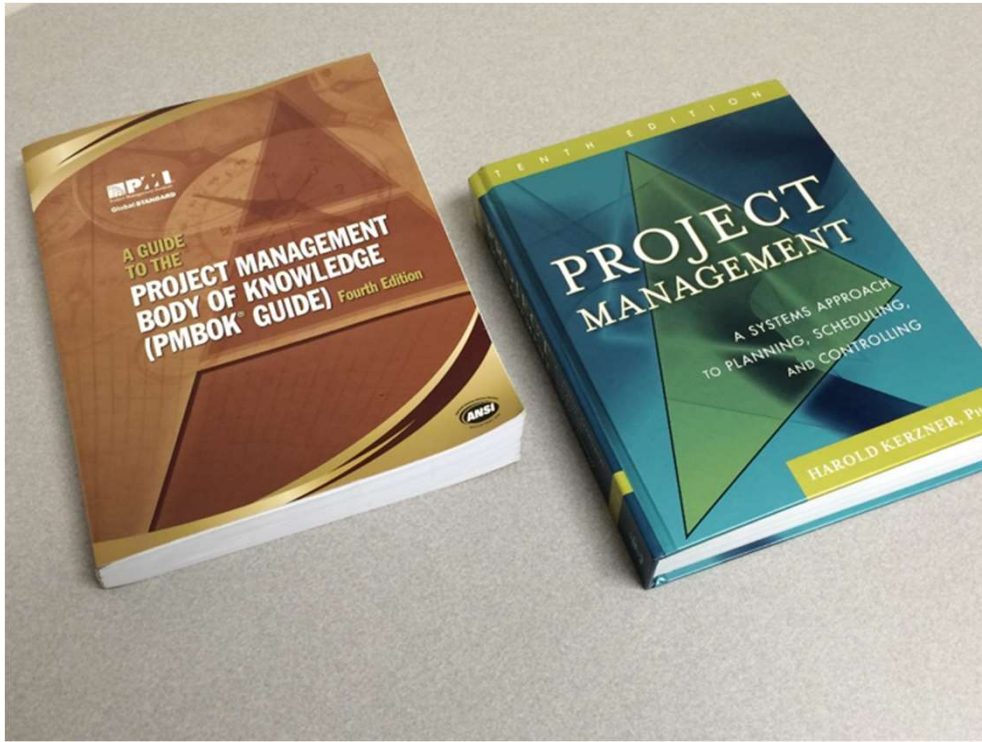


Figure 6-13. Develop Schedule Data Flow Diagram



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...



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

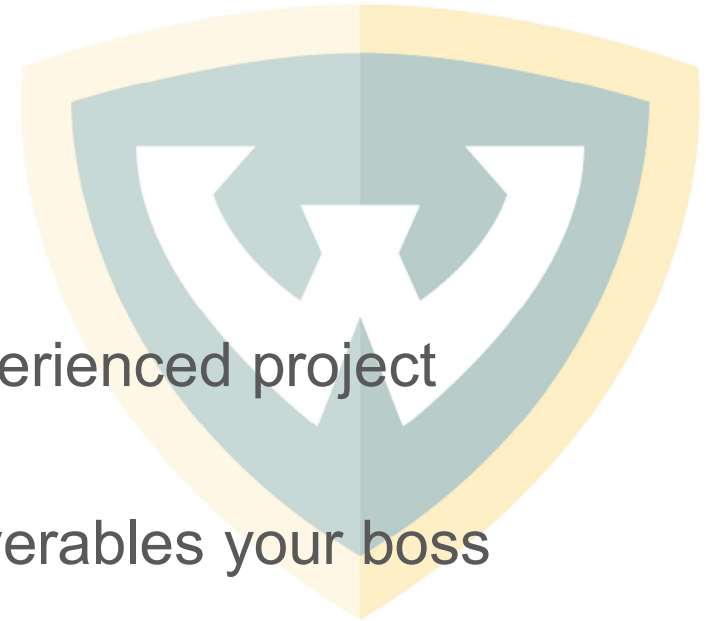


HOW MUCH PM IS REQUIRED?



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

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

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.

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

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

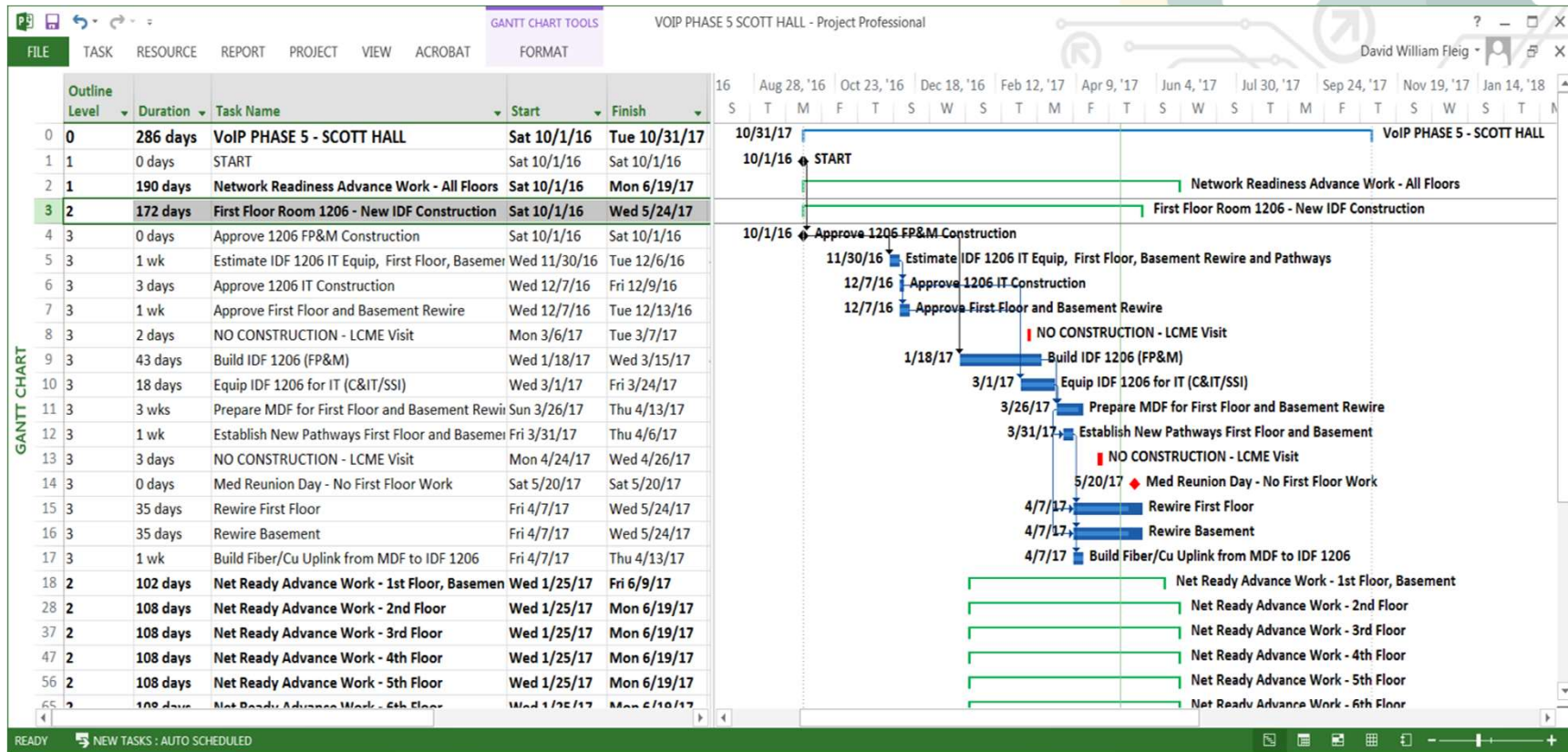
C&IT Network Services ◊ 5925 Woodward ◊ Detroit, MI 48202-3555 ◊

PROJECT PLAN

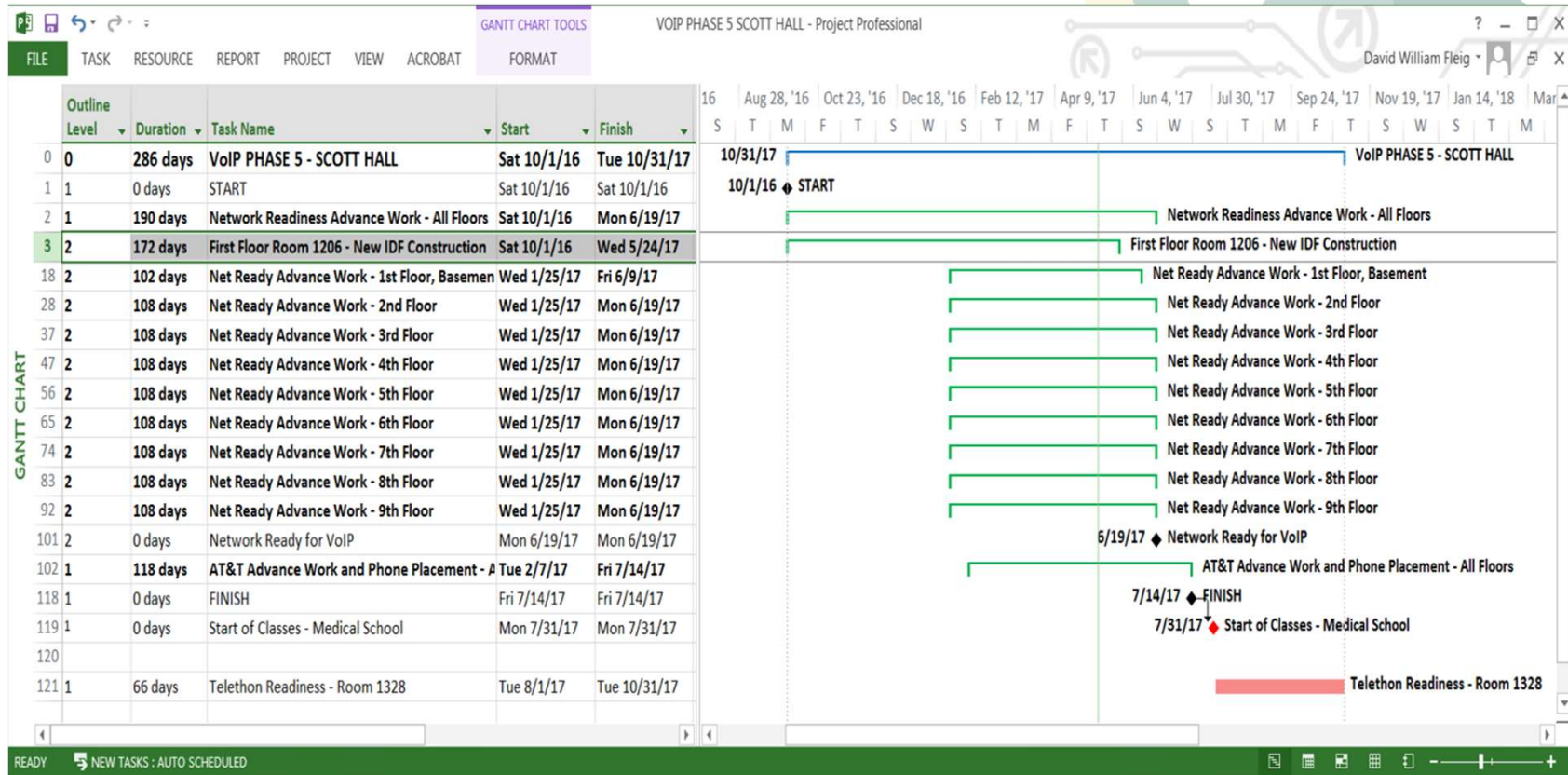
- List of tasks with duration and dependencies
- Shows deliverables and resources
- May or may not include milestones



EXAMPLE PROJECT PLAN



PROJECT PLAN - HIGH LEVEL



PROJECT PLAN - MILESTONES

VOIP High Level Milestones Rev A				2015				2016				2017			
ID	Duration	Task Name	Start	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, Macabees, FAB)	Mon 11/30/15	◆ VoIP Deployment - Phase 1.5 (AAB, Macabees, 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 (mostly SOM)											

PROJECT PLAN - OUTLOOK

The screenshot displays the Outlook calendar interface for the 'VoIP Project - Med School Building Access Dates' calendar. The main view is a monthly calendar for September 2016, with a task pane on the right showing details for a selected event.

Calendar Data:

Month	Day	Event / Task	Start/End
August	28	8:00am Mazurek and Shiffman - Install and Cutover Dell Switches - Chuck and Carlo	8:00am - 12:00am
September	29	VoIP Electrical - Lande	12:00am - 12:00am
September	30	Tolan Park 4 and 5	12:00am - 12:00am
September	31	Tolan Park 2 and 3	12:00am - 12:00am
September	1 (Sep 1)	VoIP Electrical - Lande	12:00am - 12:00am
September	2	VoIP Electrical - Athletic Complex	12:00am - 12:00am
September	3	Tolan Park MDF	12:00am - 12:00am
September	4	Chuck out	12:00am - 12:00am
September	5	VoIP Electrical - Athletic Complex	12:00am - 12:00am
September	6	Labor Day	12:00am - 12:00am
September	7	VoIP Electrical - Beecher	12:00am - 12:00am
September	8	6:00am Mott MDF Cutover	6:00am - 12:00am
September	9	Chuck out	12:00am - 12:00am
September	10	Mott 2 post relay rack replacements SSL Chuck	12:00am - 12:00am
September	11	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
September	12	VoIP Electrical - Mott	12:00am - 12:00am
September	13	Chuck out	12:00am - 12:00am
September	14	Mott IDF Cutovers 6-8 Daily after SSI Updates	12:00am - 12:00am
September	15	Elliman Basement Cable Move L...	12:00am - 12:00am
September	16	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
September	17	VoIP Electrical - Mazurek/Shiffman	12:00am - 12:00am
September	18	VoIP Rewire 1st Floor Mott	12:00am - 12:00am
September	19	VoIP Electrical - Lande	12:00am - 12:00am
September	20	VoIP Electrical - Mazurek/Shiffman	12:00am - 12:00am
September	21	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
September	22	MED SCHOOL - NETWORK REA...	12:00am - 12:00am
September	23	Lande Basement CAT3 Remediation	12:00am - 12:00am
September	24	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
September	25	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
September	26	AT&T Phone Placements - Temp Halt - When Resume???	12:00am - 12:00am
September	27	Lande Basement CAT3 Remediation	12:00am - 12:00am
September	28	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
September	29	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
September	30	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am
October	1 (Oct 1)	ATT Phone Registrations at C&IT - Temp Halt - When Resume???	12:00am - 12:00am

Task Pane Details (Selected Event):

- Event Name:** VoIP Electrical - Lande
- Start:** 8/29/2016 12:00 AM
- End:** 9/3/2016 12:00 AM
- Reminder:** None

ACTIVITY/RESOURCE TRACKING TOOLS

PHASE 3 NETWORK READINESS STATUS CHECKLIST - Excel

David William Fleig

Building	Room	Primary Engineer	Backup Engineer	Network Switches Quoted	Network Switches Ordered	Network Switches Received	Network Switches Configured	Network Switches Installed	Network Switches Ready except for cross-connects	Core Network Configured for VoIP Complete	Walkthrough Audit Complete	VoIP Cross-connects Complete	Phone Test Complete (each stack/each closet)	IT Closet VoIP-Ready
				Dave	Dave	Dave	NES	NES	NES	NES	Kathy	NES	NES	11/16/2016
Schaver Hall #038	001	Tim	Joe	X	X	X	X	X	X	X	X	X	X	X
CAT 6	312			X	X	X	X	X	X	X	X	X	X	X
Community Arts Center #039	039.1	Laurie	Joe	X	X	X	X	X	X	X	X	X	X	X
CAT 3/6														
Art Building #040	159	Laurie	Joe	X	X	X	X	X	X	X	X	X	X	X
CAT 6														
Alumni House #042	030 Cage	Laurie	Joe	X	X	X	X	X	X	X	X	X	X	X
CAT 3/5/6			Joe											
McGregor Conference Center #043	036	Laurie	Joe	X	X	X	X	X	X	X	X	X	X	X
CAT 6														
Walter Reuther Library #036	016	DeVaughn	Tim	X	X	X	X	X	X	X	X	X	X	X
CAT 3/5/6	126			X	X	X	X	X	X	X	X	X	X	X
Actual Splits Unknown	150/112/152			X	X	X	X	X	X	X	X	X	X	X
	228			X	X	X	X	X	X	X	X	X	X	X
	258			X	X	X	X	X	X	X	X	X	X	X
	328			X	X	X	X	X	X	X	X	X	X	X
	350/358			X	X	X	X	X	X	X	X	X	X	X
	428			X	X	X	X	X	X	X	X	X	X	X
	458			X	X	X	X	X	X	X	X	X	X	X
Rands House #028	001 (229?)	Chuck	Laurie	X	X	X	X	X	X	X	X	X	X	X
CAT 6														
Jacobs House #033	013	DeVaughn	Laurie	X	X	X	X	X	X	X	X	X	X	X
CAT 6														

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

WSU Project_Mgmt_Issue_List_with client - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ACROBAT

A2 Issue#

Issue #	Issue / Action	Status	Owner	LEAD PM	SME	Date Opened	Due Date	Date Complete	Status HISTORY
48	Migration to M9k - What changes are needed in the Mitel databases.	4/26 - Dennis to get engineering to assist as to why these 2 phones did not register. 4/25 - Matt power cycled 2 phones and they did not register at the new M9k. Asking Mitel engineering to assist with what is the issue and next steps. 4/19 - WSU has identified the MAC and IP of phone. Will turn off and these phones to then register to the M9k. 4/12 - Kathy is investigating these phones. Once MACD is identified power to be cut to the port. 3/29 - New report provided. @47 phones still on M4k. Kathy will investigate that report. 3/22 - Requesting a new report for what remains on M4k. 1/17 - Dennis pulled another report. Tier 3 has ran a new report for the WSU M4K HA Pair. The total final remaining users on the M4K HA Pair is 51 users. 1/16 - Mitel pushed out phone configs that did not move to the M9k. A new report/list to identify what is outstanding to be shared. 1/11 - Dennis to reach out to Doug Schlarman for additional help and will run another report. 12/14 - This is a 6867i phone. 150 phones outstanding on the m4k report. Dennis to confirm with Doug/Tier 3 what are the next steps. Trying to avoid to reboot each phone. 12/13 - WSU rebooted phone number 313-577-1417 today at 12:45 am (EST). Now the phone has a strange sounding dial tone and ring tone. (different than	Dennis King			10/05/16	10/12/2016 10/26/16 11/23/16 11/18/17 2/4/17 2/15/17 2/22/17 3/29/17 4/5/17 4/19/17 4/26/17		12/7 - Kathy needs another report on what remains on the M4k at the user level 11/23 - Dennis will share this report. 11/16 - Is there a report that identifies what remains on the M4k? Dennis will reach out to tier 3 for this report. David Grooters shared that the outbound proxy at the template level will still need to be removed. This cleanup to be done after the porting associated with phase 11/9 - Outbound proxy on some phones and not others. Changes made at the group level will not have the outbound proxy and this is ok. 11/7 - Mitel changed all the users over from the M4k to the M9k on Friday - at the group level. I have not heard any reports of problems. It is possible that some phones have not yet picked up the change. We will monitor the M4k and once the users are off the M4k, we will be modifying the phone templates to remove the SBC settings we added for the migration. 11/2 - Mitel Tier 2 Operations is aware of the WSU migration from the M4k HA Pair to the M9k HA Pair this week that is currently in progress from 10/31 thru 11/4. They are also aware of the porting event for this coming Friday (11/4) at 7:00am for Phase 3. Continue to see progress made for the migration via Option #1. Tan completion 11/4/16. 10/26 - Dennis will update the dates associated with Option #1 for the migration. Version #4 to be provided. The last date to migrate is 11/4/16. Revised plan provided.
50	IP vs. NAME for DNS - HOLD	1/11 - This needs to be revisited once the M4k has been decommissioned. 10/12 - This was discussed to be used as a potential solution for any future SBC changes. 10/5 - The DNS servers in HVS could be altered to allow name vs. IP.	Skip Standriff Matt Lessins Gaurav Madaan/Logical Change Team			10/05/16	10/26/2016 11/14/16 HOLD		
53	MP118 - Another IP needed for international dialing - HOLD	10/26 - Suggestion was to make use of the M4k once it has been decommissioned. 10/24 - Need to update the MP118 file. Mitel to provide the template. For future reference, the 2nd MP118 FXO that was disconnected will need to be installed with a new LAN IP address. At some point in the future before we decommission the M4k HA pair, both MP118 FXO devices will need to have new routing to the M9k HA Pair. WSU currently has the one MP118 FXO up and working at CSC that supports all international calls and is pointed to the existing M4k HA Pair.	Dennis King			10/24/16	10/26/2016 11/23/16 HOLD		
59	HVS Broadband Communicator Client	3/1 - WSU currently not ready to implement Communicator. May not be for another 6 months. What will be needed is the finalized quantity of licenses	Bruce Varana Joe McCarthy			02/01/17	2/15/2017 2/22/17		2/8 - Mitel to identify what parameters for the application, the import template instructions from beginning to end since not all 600 end users will be implemented

PROGRAM ISSUES ACTIONS LOG | Completed | Freeze Dates | Sheet1

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



STATUS REPORTS

VoIP Executive Oversight Meeting Agenda

Date/Time of Session:

March 15, 2016

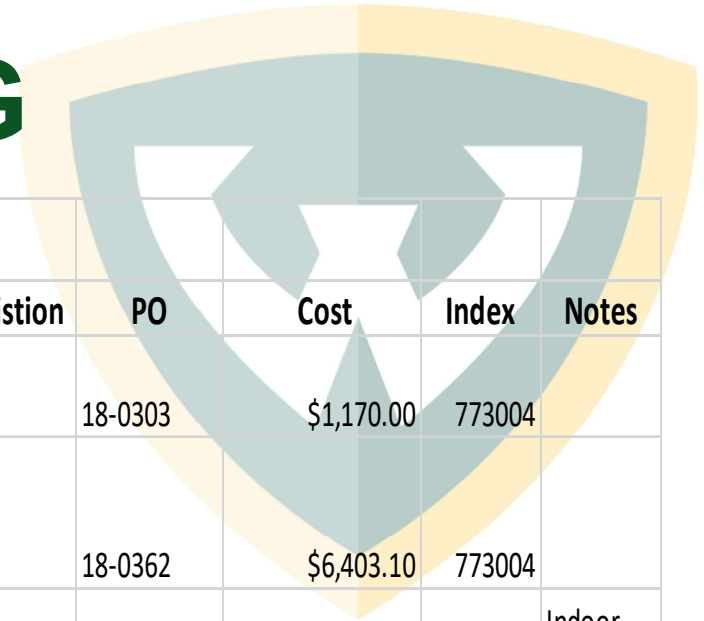
- 1) Project Updates
 - a) Phase 2 Outstanding items
 - i) 12 incidents & 10 Service requests
 - ii) Dave Foote assistance to create a single VOIP support group
 - iii) Centrex lines are still active (not disconnected by AT&T)
 - iv) WDET Newsroom
 - v) Missing Phantom lines issue, workaround in place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

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



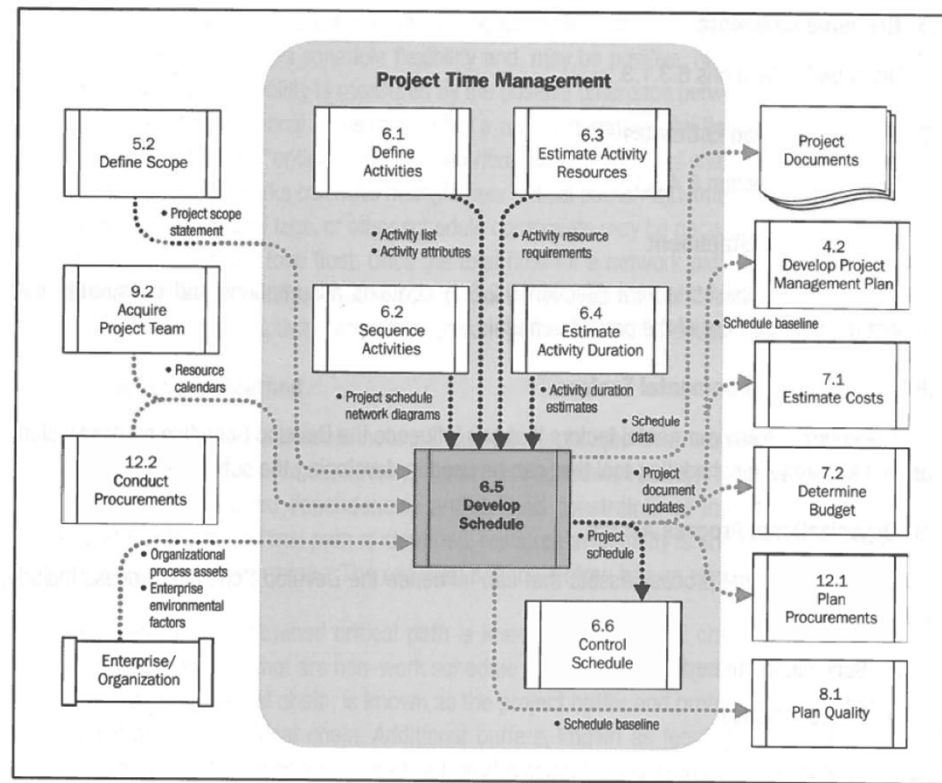
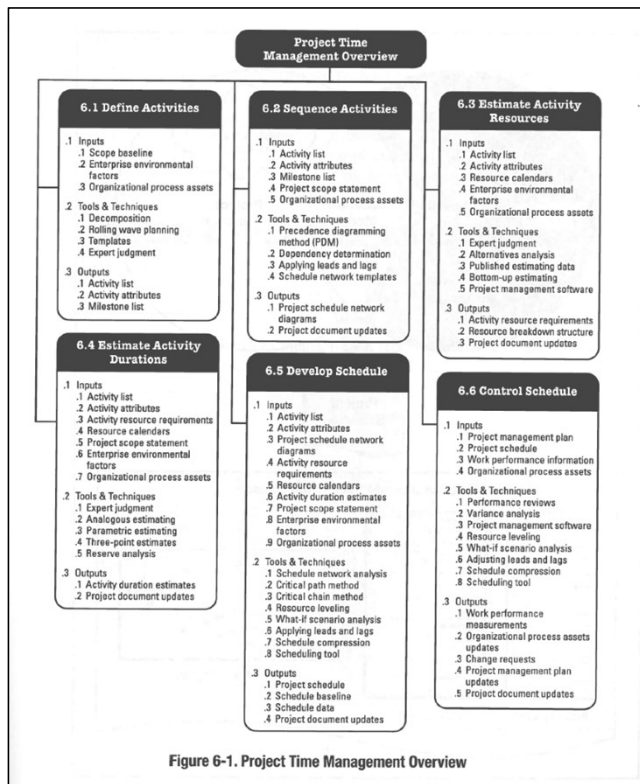
Expenses to date - Detail									
Date	Category	Contractor	Description	TSR	Requisition	PO	Cost	Index	Notes
3/13/2018	Wireless APs and Cabling - Campus	SSI	Replace existing access points in Computer Center	E34734		18-0303	\$1,170.00	773004	
3/13/2018	Wireless APs and Cabling - Campus	SSI	Install 10 additional 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	<u>\$88,802.75</u>		

USE THESE

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



NOT THESE



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

COMRADERY

- **Team building**

- Going out for pizza and beer is fun...
- Working together toward a common goal
- Acknowledging/sharing successes
- Works better



DISSEMINATE THE INFO

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

- **Why?**
 - Involvement
 - Understanding



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:

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