

NEOPMI Chapter Meeting, 10/20/10

Group Topic Notes – *DAY-TO-DAY CHALLENGES/SOLUTIONS*

Topic 2 – Scope Management

Facilitator – George Jackson

1. Scope Management – how to define and control.

Response:

1. Planning
2. Scope Definition
3. Create WBS
4. Scope verification
5. Scope control

2. If scope of project is not being properly managed, what should happen?

Response:

1. Fire Project Mgr (since he never showed up for meetings)
2. Restart the project or redefine the scope
3. Identify corrective measures
4. Implement steps to ensure adequate review
5. Implement change control process

3. What are reasons for scope changes?

Response:

1. Customer needs changed
2. Running out of time or resources; changes in resources or allocations
3. Changing business conditions – regulation changes, competition
4. Change in strategy, priorities
5. Change in stakeholder(s)
6. Big projects which span many months/years have a tendency to see changes in scope more often
7. Funding changes

4. Who has power to change scope of project?

Response:

- a. Stakeholders
- b. Stakeholders should have Project Mgmt wisdom to understand impact to project if scope of project changes

5. How do you manage scope of a project that involves outside vendors?

Response:

- a. Make sure the right people are at the table. If the right people are not there, then changes are requested.
- b. Set up a steering committee to monitor
- c. Well defined change management procedures
- d. Well defined client management processes
- e. Well defined priorities
- f. Manage stakeholders expectations
- g. Respect the project charter or Statement of Work
- h. Have separate project managers for technical side and business/application side
- i. Have established processes in place to manage cross functional issues and managing the project across the organization

6. Suggestions for handling scope-creep.

Response:

1. Schedule a meeting with all project managers involved
2. Ensure you have business buy-in to scope change
 - a. Communicating to all project stakeholders how big the request is. Impact to schedule, cost of project, resources

7. Project Management toolbox for managing scope.

Response:

- b. Favorite list of questions
- c. Simple task lists stored in a place where all project participants can see
- d. Weekly status meetings where project participants report status
- e. Gain buy-in from project stakeholders before begin work
- f. Follow the 80/20 rule. Focus on project deliverables that will be utilized by majority of the project stakeholders.
- g. Have PM tools to help track project status
- h. Have an issues list where risks, gaps and issues are documented
- i. Breakdown project into manageable tasks
- j. Build in flexibility into project plan
- k. Conduct brainstorming session with project managers, sponsors and stakeholders and give them 1/2 sheet of paper and 5 mins to list goals/objectives of the project. Hang each sheet, read it and get everyone on the same page.

8. How should you handle a project that consists of lengthy documents?

Response:

- a. Schedule mtg to walk thru
- b. Schedule mtg to get sign-off

Topic 3 – Managing Resources--includes contractors

Facilitator – Bob Zoller

Managing 'uncontrolled' resources

- Create schedule
- Assign resources
- Get deliverable commitments from resources and their management, from the beginning; use this as leverage to keep the resources on track

Managing indirect/outside resources

- For each group – there should be a 'lead' or single contract point so that there aren't a large number of person to person contact points between multiple groups
- Feedback process for resource performance should be pre-defined in contract, if possible.
- Define deliverables, and get commitment from the resources for the deliverables, not just X number of hours of estimated effort
- Establish regular communication and milestone checks, and escalation process for issues
- Have HR management plan; includes resource growth/expectations

How to find and address over-allocation

- Show estimates for projects and non-project work for resources over future time buckets; resources will normally become overcommitted if projects are accepted based on gut-feel of capacity
 - Prioritize work, including business unit agreement so that the business unit must then agree if priorities are to be changed
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Topic 4 – Estimating Techniques

Facilitator – Mary Kosovich

1. Challenges include:
 - a. Estimators think they know more
 - b. Want to paint 'rosy' picture

Response:

6. Identify smaller tasks; plan at lower level
7. Search out expert opinions
8. Consider skill (past performance) of an associate on a similar task
9. Utilize outside resources with expertise in estimating
10. Add contingency
11. Make sure estimators have enough information to estimate the task
12. Better business requirements results in better estimates of effort
13. Associates performing estimates should be co-located.

2. Management and/or stakeholders do not like the estimate

Response:

2. Adjust scope (phase in the project versus utilizing big bang approach)
3. Rethink concept
4. Identify constraints upfront
5. Offer options for implementation upfront

3. How do you handle estimations when technology platform is unknown?

Response:

8. Get information for both applications team, project stakeholders as well as technology team
 9. Consider risk in your estimates – add contingency to handle
 10. Present an estimate range (high – medium – low)
 11. Validate estimate of effort with technical management team prior to presenting to project stakeholders.
12. How to estimate remaining work?

Response:

1. Use EVM (assume Earned Value Measurement)
 2. Rely on resources to report how much they have spent versus hours remaining
13. How do you communicate changes in estimates as project moves forward?

Response:

1. Tell project stakeholders upfront that estimates will change
2. Utilize past history (or task actuals) to come up with original estimate, whenever possible.
3. Include contingency hours in project plan

Response:

- a. Strict change control process.
 - b. Separate project to define business requirements
 - c. Coaching of business partners on how to complete project charter; especially cost/benefit section
 - d. Having the right resources involved in defining business requirements.
 - e. Don't rush the planning phase
 - f. Suggest lunch and learn sessions on how to complete project charter led by Sr. Project Managers.
4. Scope document – do you change when change request approved?

Response: Yes

5. Who approves change requests?

Response:

- a. Stakeholders
6. What if boss is the stakeholder and he keeps on approving things?

Response: Keep track of changes and tell him what is not getting done because scope keeps on changing.

6. Challenges of multiple PMO's and using different PM software tools and different chargeback rules.

Response: No one at table has experienced this. Suggested chapter member contact Karen Opalka to get contact name at Goodyear or to put question out on LinkedIn site.

7. Challenges with working with vendors?

Response:

- a. Make them follow your standards/processes.
 - b. Making sure there is no 'them versus us' going on
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Topic 5 – Agile Methods

Facilitator – Christy Laird

Issues and solutions:

1. Multiple teams (large project teams make for large pairing teams and sub-team management gets difficult) -
 - a. Solution - Split the teams into separate projects, add more PMs.
2. Teams aren't always consistent (resources move in and out over longer duration period projects, the velocity is calculated on the team as is after a few sprints/iterations)
 - a. Solution - make sure the duration isn't long, or secure the contract for resources (good documentation and up front training of new team members helps with transition).
3. Sponsors/business buy-in is tough - they are used to waterfall projects and agile doesn't completely make sense to them, harder to see the smaller deliverables
 - a. Solution - this one is hard, for startup/first-time agile projects, we suggested start small with a pilot to 'show' upper mgmt the positive results (a high level overall design and general time table that is derived from Product Based Planning helps as well).
4. Scope creep (changes added on throughout the project) - in manufacturing, the industry is so fluid that to keep up with the competitors you have to deliver fast, changes tend to creep in when the durations are long
 - a. Solution - use change management as best you can.
5. Managing external development and resources is complicated when they are fractional and not working with the core agile team
 - a. Solution - another plan or PM maybe? we didn't have a good solution for this (for internal resources in other support organizations try to get a written commitment from their management to support your project's time and schedule (improving the project priority helps as well). For resources from external companies, get the commitment via a contract or agreement.
6. Pointing [story card (hours or points) for each dev item] is tough at first, but easier as sprints/iterations roll out (mostly senior developers pointing the cards until junior developers learn the ropes)
 - a. Solution - try to keep the same team for consistency and/or do training (pointing guidelines also helps).

7. Because all the cards have their own individual mini-designs, sometimes the larger design will change over time as development is completed and integrated
 - a. Solution - see how much you can integrate early on (assign someone on the team to watch for shifts in overall design).
 8. Time/schedule mgmt - primavera doesn't work very well with Agile development/planning, it's hard to have accurate earned value when you can't report out in the tool on points and velocity.
 - a. Solution - use a better time tracking tool (not Primavera, maybe VersionOne).
 9. Pairing/teaming is challenging with different personalities
 - a. Solution - try to pair everyone up with personalities and styles that go well together, do teambuilding (give credit to the pair/team not to individuals).
 10. Thorough testing is a challenge with smaller components being delivered, some teams do a final integration test/period at the end after dev complete and cards are completed
 - a. Solution - try to deliver in sprints (with the correct duration) so that you can elevate as you finish a sprint or iteration.
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Topic 6 - Motivation techniques

Facilitator – John Schumaker

What motivates your team members

- 1) Find out what motivates each team member
 - a) Motivators are different for each team member
 - b) Individual's personal history can have an impact
 - c) Rapport building, what will work for them as an individual and with the team
 - d) Understand what do they want from the project - development opportunity (What is in it for me!)
 - e) Identify the type of rewards that will work for them and understand how they like to be recognized (not all people like formal or public recognition)
 - f) Personal Goals
 - g) Identify where they fit into project
- 2) Personalize it
- 3) What makes them tick
- 4) Development opportunities
- 5) Environment
 - a) Easily overlooked
 - b) Are you located as one team?
 - c) Are you location in the same building/state/country?
 - d) Schedule variances/time zone impacts
- 6) Interest level
 - a) Make certain everyone understands "Why the project"
 - b) Define project goals
 - c) Bring people onto the project from the start whenever possible
- 7) Project Manager - PM attitude sets tone, stay positive!!
 - a) Roll up sleeves
 - b) Do not be distant
 - c) Ask 'dumb questions'
 - d) Communicate, Communicate, Communicate
- 8) Remove participant - sometimes you find it necessary to remove a team member who is a demotivator and has a negative impact on the team

Rewards

- 1) Financial and Nonfinancial
- 2) Small inexpensive rewards can provide big benefits
- 3) Recognize milestones/accomplishments - make certain they are timely
- 4) For large projects celebrate milestones as well as project completion
- 5) Communicate milestones/accomplishments upward
- 6) Small rewards can be individual or within the team
- 7) Define and reward stretch goals/targets – not just do it faster
- 8) Types of Recognition
 - a) 'Atta-boys'
 - b) Emails, with cc: superior
 - c) Visual recognition (team or department meeting, etc)
 - d) Exciting assignment
 - e) Lunch/meeting CIO or business stakeholder

How to get people engaged who are busy?

- 1) Understand if they are assigned or volunteered
- 2) Have Project Sponsor provide an overview
- 3) Understand why something is done
- 4) Define the big picture
- 5) Demonstrate the appropriate sense of urgency
- 6) Brownies!

What can you do when a Project goes on for years?

- 1) Define milestones
- 2) Reiterate stakeholder commitment
- 3) Show successes to date Move people around to different roles so they have excitement in their jobs

How do you motivate Infrastructure projects – exciting projects

- 1) Show the customer value the project brings
- 2) Make sure team understands the big picture
- 3) Stress the importance, building foundation for future.

Topic 7 – Project Portfolio Management

Facilitator – Erin Sluga

Challenge: Understanding Corporate goals

Strategies for Resolution:

- Meetings should incorporate the right people at the right time. Communication is a key aspect.
- Documentation, particularly in the planning phase, will help clarify goals (Example: project charter).

Challenge: Communication

Strategies for Resolution:

- Obtain buy-in from leadership/management.
- Identify stakeholders and define roles.

- Filter communication to all resources and create bi-directional communication and feedback between management and day-to-day resources.

Challenge: Prioritizing

Strategies for Resolution:

- Establish prioritization criteria.
- Create a review board, governance team, and process.

Challenge: Limited Resources

Strategies for Resolution:

- Create a Resource Management Plan. Actively manage resources.
- Understand time constraints. Understand resource inventory.
- Prioritize.

Challenge: Clearly defined strategies

Strategies for Resolution:

- Documentation.
- Create a sign-off process to gain commitment. Meetings should include the right resources and stakeholders.
- Spend time in up-front planning.
- Define metrics.

Challenge: Management wanting to take on more projects than they can staff

Strategies for Resolution:

- Build an understanding that this hurts all projects' overall effectiveness.
- Prioritize the triple constraints.
- Educate and train on project management skills, methodologies, and processes.
- Perform gap analysis. Deliver the message to management in the right way. Present facts and options.
- Manage expectations.

Challenge: No clear way to prioritize (different customers, limited time, limited money, one project splitting to multiple projects)

Strategies for Resolution:

- Theory of constraints. Obtain buy-in to the philosophy.
- Determine what criteria to use to prioritize.

Challenge: Resource management

Strategies for Resolution:

- Critical resources are in high demand. Try predicting the spikes in demand (be proactive). Involve HR for staffing needs.
- Define the critical path and adjust the schedule.

Challenge: Effective use of project dashboards

Strategies for Resolution:

- Define metrics.
- Determine how to use them and how to make them effective and standardized.
- Demo successful measurements to other teams.

Challenge: Customer satisfaction

Strategies for Resolution:

- Make the customer a part of the team.

Topic 8 – Project Charters and Statements of Work [SOWs]

Facilitator – Karen Opalka

1. Is project charter a living document?
 - a. Response: No. Use change management process to track changes to scope.

2. How handle weak business requirements and come up with high level estimates?

3. Response:
 - a. Strict change control process.
 - b. Separate project to define business requirements
 - c. Coaching of business partners on how to complete project charter; especially cost/benefit section
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Topic 10 – Other Topics

Facilitator – Liya Novik

PMO Standards and Process

Issues/Challenges

- Can prohibit the PM from responding quickly to urgent needs
- Can be difficult to tailor
- Can lead to habitual bending of rules
- Certain people seem to get exceptions
- Not following can impact future results

Actions

- PMs should use these as a starting point and for consistency across the company
- Use them to help meet customer needs

Securing Resources

Issues/Challenges

- Competing with other projects for the same resources
- Resource information is stored in separate places
- Original estimates are unrealistic which lead to having to request extra resources later on
- Companies moving towards using generalists that adds a lot of on-boarding time to projects

Actions

- PMs need to make resource requests specific
- PMs need to have an escalation point for resource issues
- PMs may have to wait for the right resource
- PMs should ask for a blended Resource Model (SMEs and Generalists)

Communication During Projects

Issues/Challenges

- Project repositories are different and in transition - Lotus Notes / Outlook / SharePoint - Moving towards SharePoint, which is not user friendly and hard to adapt to.
- Getting team to communicate consistently

Actions

- Need to set up a Project Communication plan
- Need to have the right balance of meeting with the right agenda, people, and timing