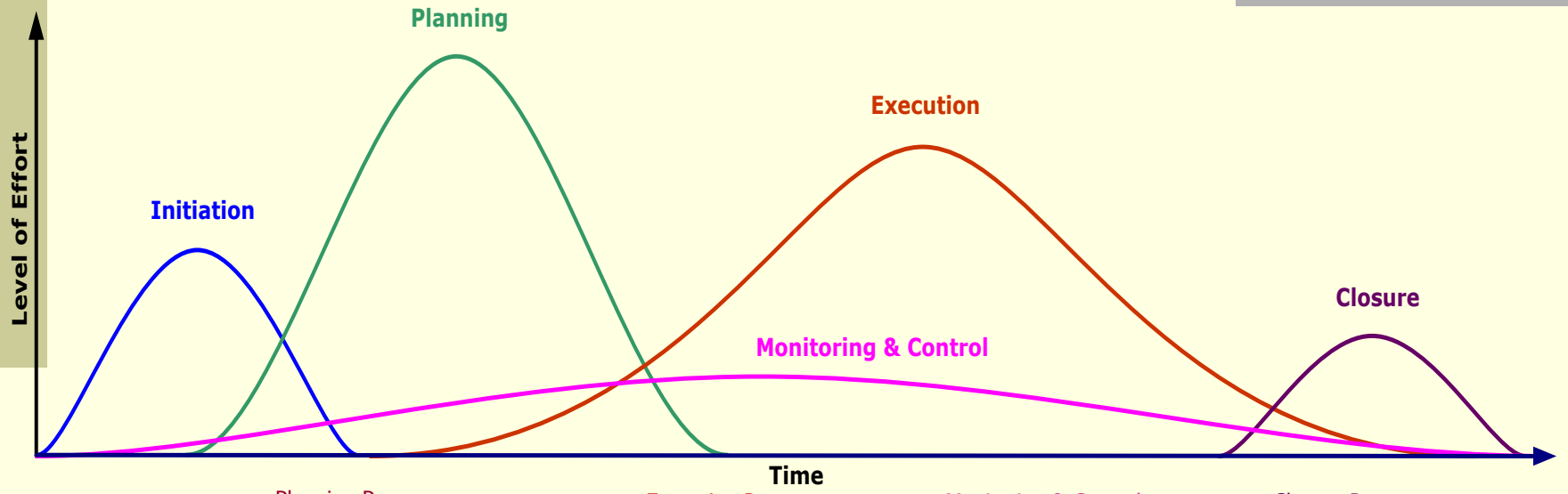
ITD PMO Project Lifecycle



Initiation Process:

1. Develop project charter
2. Identify sponsor and stakeholders
3. Conduct sponsor interview
4. Observational input
5. Project kickoff meeting
6. Determine resource roles
7. Scope documentation
8. Gather detailed level business and technical requirements
9. Talk with peers who have managed similar projects

Planning Process:

1. Solidify resource needs
2. Establish roles & responsibilities
3. Develop communications plan
4. Hold planning meetings
    1. Create WBS (Brainstorming)
    2. Define activities
    3. Sequence activities
    4. Estimate activity resources
    5. Estimate activity durations
5. Schedule/timeline development
6. Workflow change considerations
7. Determine legal considerations
8. Disaster recovery considerations
9. Develop/determine training plan

Execution Process:

1. Execution kickoff meeting
2. Current state assessment
3. Proposed design
4. Verify resource needs still appropriate
5. Prototype or proof of concept
6. Space planning considerations
7. Final design
8. Support plan
9. Readiness meetings
10. Go-Live execution plan

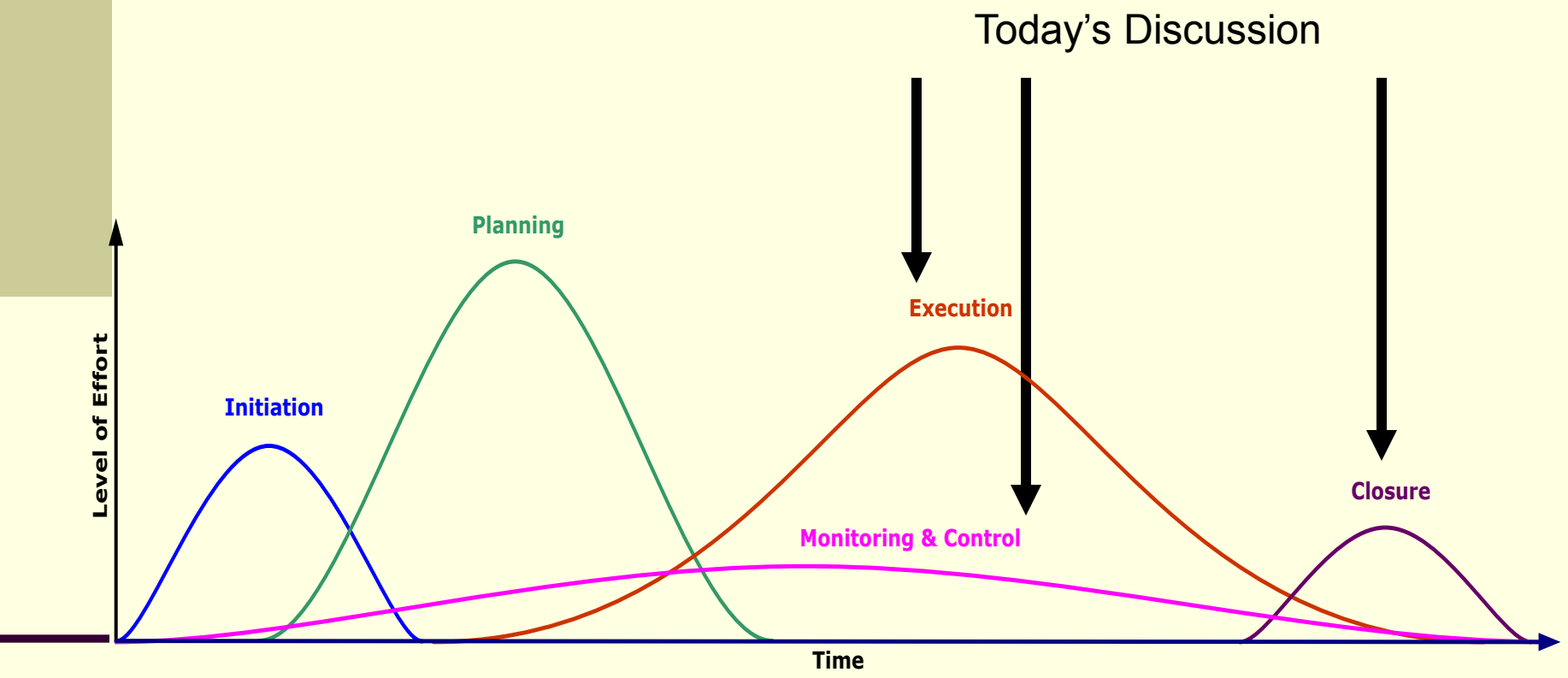
Monitoring & Control:

1. Risk management
2. Issues management
3. Change management
4. Procurement management
5. Review regulatory requirements
6. Project status reporting
7. Meeting management

Closure Process:

1. Closure meeting
2. Closure checklist
3. Verify scope completion
4. Vendor contract verification
5. Document lessons learned
6. Transition to support
7. Release resources
8. Reward & Recognition
9. Archive project artifacts
10. Vendor/Contractor access

ITD PMO Project Lifecycle



Goals

To understand the Execution, Monitoring and Control, and Closure Phases of the ITD PMO Methodology

- Execution Phase
  - Current State Assessment
  - Prototyping or Proof of Concept
  - Go-Live Plan
  - Support Plan
- Monitoring and Control
  - Risk Management
  - Issue Management
  - Change Management
  - Project Status Reporting
  - Meeting Management
- Closure
  - Document Lessons Learned
  - Transition to Support
  - Release Resources
  - Reward and Recognition
  - Archive Project Artifacts
  - Vendor/Contractor Access

Communication

What is it?

- Promotes the most effective and efficient means of communicating with the various constituents/key stakeholders
  - Effective means that you are providing information in the right format, at the right time and with the right impact.
  - Efficient means that you are providing the information that is needed.
- Working the Plan, not planning the work. 90% of a project manager's time during Execution is spent in Communications Management

Why is it important?

- Project communications can quickly become very complex
- Channels of Communication = [N(N-1)/2]

How to accomplish…

- Organize via a Communications Plan

Communications Plan

TYPE	AUDIENCE	FREQUENCY	CHANNEL	OWNER
Type of communication medium ie: Project Status Reports, all project related meetings, Project & Technical documentation, Issue & Risk Logs, Change Control Documents	Individuals or groups that are to receive the various forms of communication, ie: Project Team, Project Manager, Project Sponsor, Stakeholders, IT Resource Managers	The frequency of distribution in terms of daily, weekly, bi-weekly, monthly, quarterly, as needed	Methods used to distribute each of the various forms of communication.	Identifies the person or group responsible for the distribution of the information.

Example:

TYPE	AUDIENCE	FREQUENCY	CHANNEL	OWNER
Project Status Report	Project Team, Project Manager, Project Sponsor, Stakeholders, IT Resource Managers	Weekly	Email link to Sharepoint document	Project Manager
Technical Documentation (test plans, test results, etc.)	Project Team	As completed	Email link to Sharepoint document	All Project Team Members
All Project Artifacts	Project Team, Project Manager, Project Sponsor Stakeholders, IT Resource Managers and Interested Parties	Draft (pre-approval) and Final Copy	Email link to Sharepoint document	Project Sponsor

Execution Process

Current State Assessment

What is it?

- Identifying the "as is" or "as built" process, design, architecture or workflow of what the project will impact.

Why is it important?

- Need to document the current state of the "environment"

How to accomplish…

- Use Expert judgment in constructing documentation

Execution Process

Prototype or Proof of Concept

What is it?

- Determining the feasibility of the project deliverables within the Clinic environment

Why is it important?

- A form of performing Quality Assurance
- Iterative: Gets proposed functionality into the hands of the Sponsor/Customer for evaluation earlier in the project lifecycle.

Execution Process

Prototype or Proof of Concept

How to accomplish…

- Design, build, test prototype of what will actually go into production
- Prototype may be reused within project or disposed

Execution Process

Go-Live Execution Plan

What is it?

- Documented plan which ensures the Go-live requirements are addressed and planned

Why is it important?

- It facilitates the communication of all expectations for the roles and responsibilities of each person / team required to move successfully through the go-live of any project.

Execution Process

Go-Live Execution Plan

How to accomplish…

- The team collaborates on the necessary actions for a successful go-live.
- Once identified, they are documented as to what they are, how they will be accomplished, who takes ownership, and when they will occur.
- Important to be proactive and identify a back-out plan if failure should occur during go-live as a whole, or to only part of the go-live and what the necessary action plan will be to mitigate it.
- Communication with all stakeholders
- Typical items in a Go-Live Execution Plan
  - Detailed schedule of all Go-Live activities with resources
  - Approximate durations
  - Check-points or Go/No Go decision points
  - Contact List
  - Back-out plan
  - Support Plan

Execution Process

Support Plan

What is it?

- Consists of an integrated plan of all the elements supporting the deliverable(s).
- Dependent upon environment and what is being supported

Why is it important?

- Identifies the what, how and who for the support needed after the project is handed over into production

Execution Process

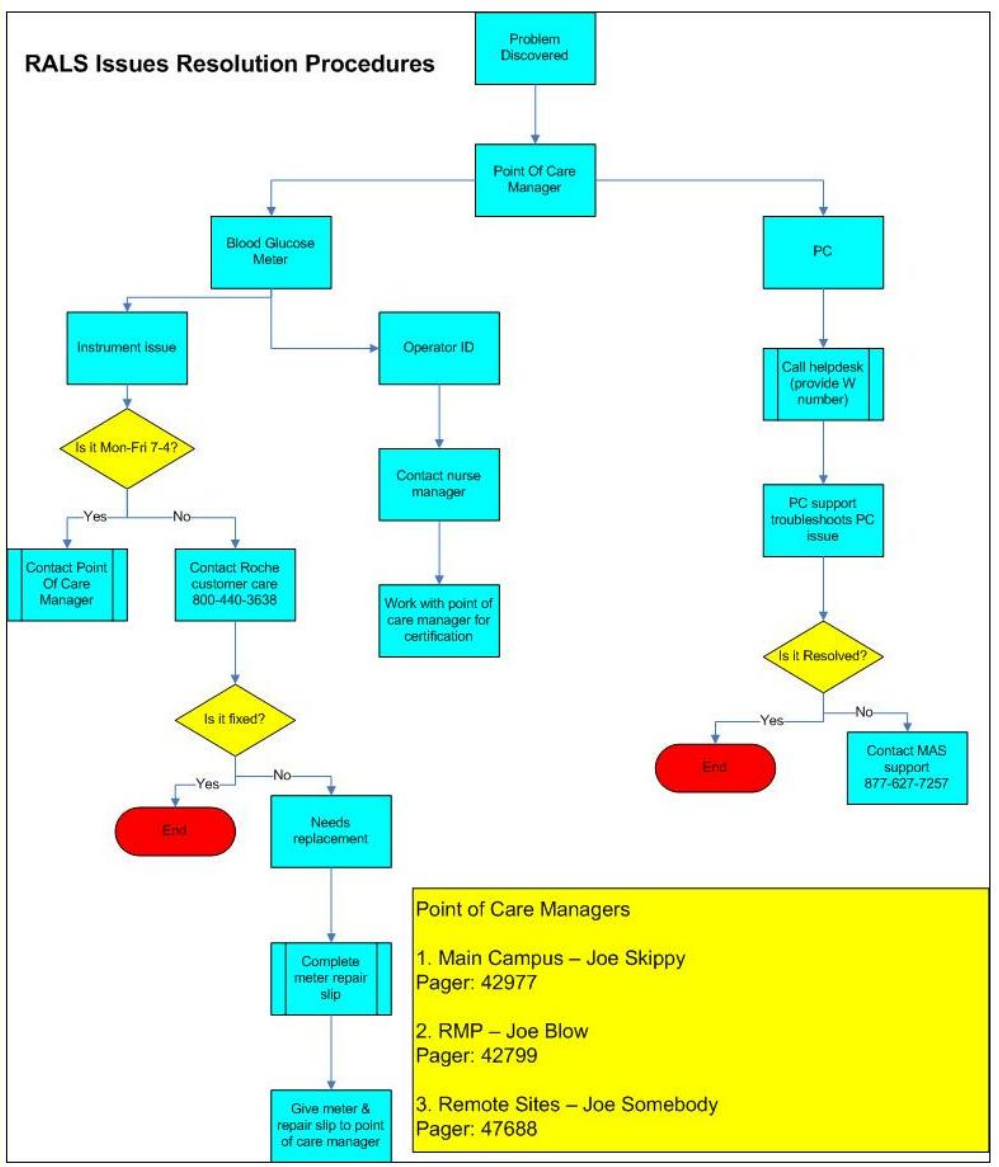
Support Plan

How to Accomplish…

- Identify production support owning team and communicate/get them involved to gain their agreement
- Use Expert judgment in constructing documentation
- Document transition plan to support
  - Flow Chart Diagram
  - Outline
  - FAQ formatted Document

Execution Process

Flow Chart Support Plan Example



Group Exercise

Scenario #1: Execution

Mr. Wil E. Coyote is poised on the edge of a sharp cliff face with his new Road Runner Smasher 2700 Anvil device. This contraption has been designed properly, tested and now it is being implemented. Wil E. Coyote has ACME's telephone numbers, and he even had regular meetings with them according to his plan. Suddenly while trying to deploy the anvil, the cliff face cracks. Rather than trying to stop the machine, Mr. Coyote ignores the issue because he is not sure what else to do. Eventually, the whole machine slams to the ground with Mr. Coyote in tow.

Q. What part of his go-live execution plan would have been helpful in this situation?

Monitoring & Control Process

Risk Management

What is it?

- Active management of ***potential/unrealized*** events that could impact a project by accepting, avoiding, mitigating, or transferring the effect.

Why is it important?

- Risk Management and Issue Management are inversely related.
  - A risk is an issue that has yet to be realized.
  - Proper Risk management increases the probability of encountering fewer issues.
  - Reduces "firefighting" mode
  - Identify Opportunity Risks

Monitoring & Control Process

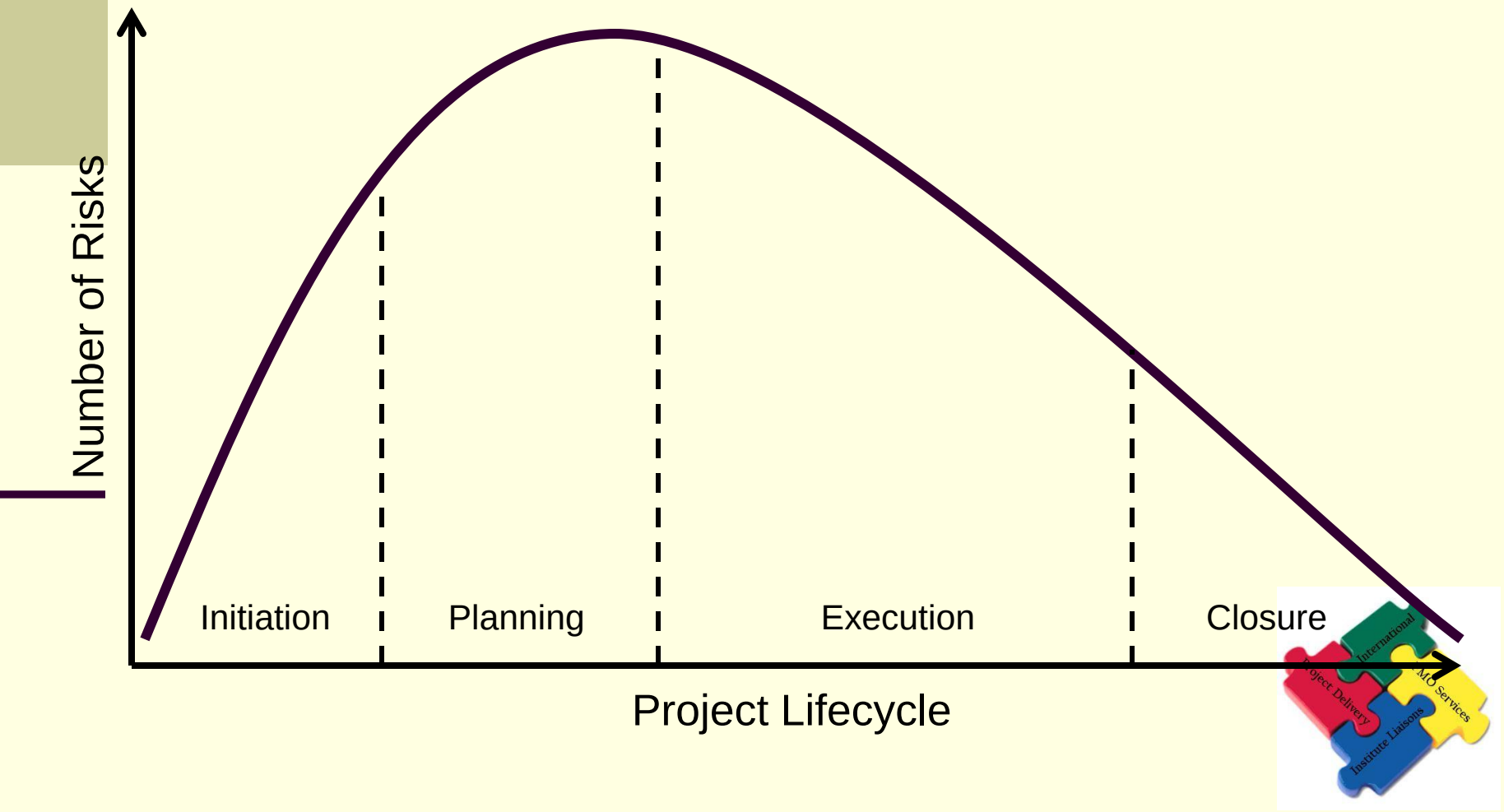
Risk Management

How to accomplish…

- PM/Project Lead facilitates a Risk Assessment meeting
- All project stakeholders participate
- Document and categorize
- Assign Impact & Probability to each
- Quantitative Risk Analysis (ITD PMO: Risk Course)
- Determine Risk Response
  - Avoid, Transfer, Mitigate, Accept
- Review/Update list on periodic basis as project information changes

Monitoring & Control Process

Risk Management



Monitoring & Control Process

Risk Management Form

Documentation							Analysis			Mediation		
Risk Number	Risk Event	Category	Triggers	Assumptions	Primary Owner	Secondary Owner	Impact	Probability	Exposure	Response	Mitigation Plan	Contingency Plan
									0			
									0			
									0			
									0			
									0			
									0			
									0			
									0			

Monitoring & Control Process

Issues Management

What is it?

- Active management of ***realized*** events that could impede a project's progress over time

Why is it important?

- Process allows a venue for effective resolution of issues

Monitoring & Control Process

Issues Management

How to accomplish…

- Document/update in a common repository
- Communicate to appropriate team members
- For issues that are beyond the control of the PM/Project lead, the sponsor serves as the final decision maker
- Raise concerns early and often
- Review list regularly for content, extent, timing and ownership
- Be accountable

Monitoring & Control Process

Issues Management Form

Document				Analysis				Tracking			
Issue ID	Issue Title	Issue Description	Submitted By	Date Submitted	Assigned To	Date Assigned	Due Date	Status	Priority	Completion Date	Comments

Monitoring & Control Process

Change Management

What is it?

- Monitoring the status of Scope, Schedule and Cost during the project's lifecycle while comparing to the baseline (i.e., what you started with)

Why is it important?

- As PMs we expect change and implement processes to keep changes managed and controlled
- Manage expectations
- Manage impact to project

Monitoring & Control Process

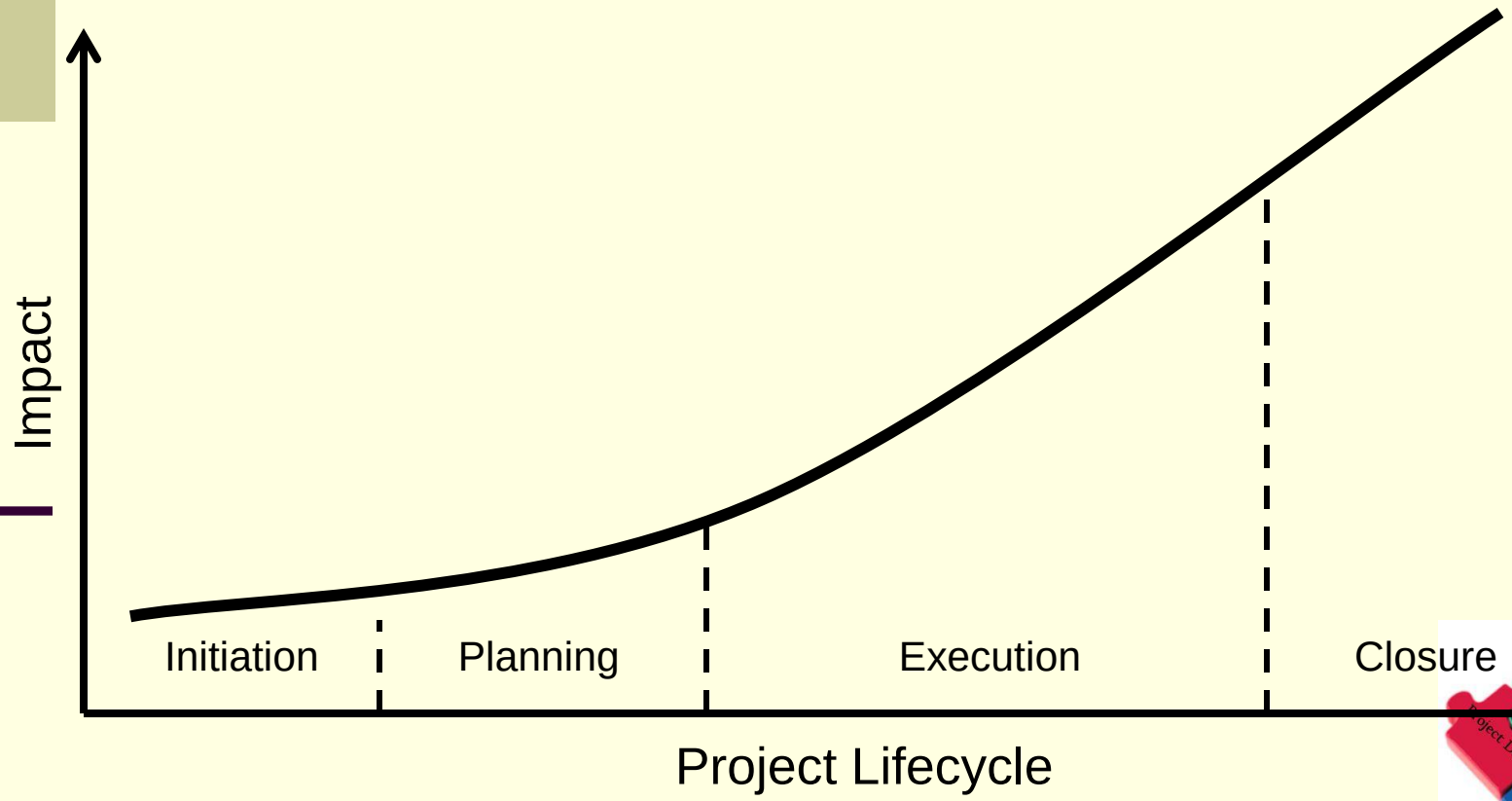
Change Management

How to accomplish…

- Document/update in a common repository
- Proactive management of requested changes to the originally agreed upon scope, time, quality, or cost deliverables
- Project Team analyzes the impact of change to project
- Project Manager presents options (if available) to sponsor
- Sponsor authorizes (Reviews, Approves, Denies) the changes
- The PM should discourage actions that attempt to circumvent the formal Change Control process.

Monitoring & Control Process

Project Change Management



Monitoring & Control Process

Change Management Form

Documentation				Analysis		Tracking			
Project Phase	Change Description	Reason for Change Request	Submitted By	Date Submitted	Impact of Change	Business Need	Status	Date Approval Needed	Approved By	Approved Date

Monitoring & Control Process

Project Status Reporting

What is it?

- Performance reporting is the process of collecting and distributing project performance information including status reports, progress reporting and forecasts

Why is it important?

- Communication mechanism that informs stakeholders and project members of the progress made during the lifecycle of a project

Monitoring & Control Process

Project Status Reporting

How to accomplish…

- Involves periodic evaluation of actual vs. baseline project data
- Performance reports need to provide information at an appropriate level for each audience
- Information that is relevant to stakeholders for the project as outlined in the Communication Plan
  - Timelines
  - Scorecards
  - Dashboards

Monitoring & Control Process

Meeting Management

What is it?

- Technique to efficiently and effectively manage project related meetings via the use of agendas and minutes.

Why is it important?

- Keeps meetings focused and productive

How to accomplish…

- Define the meeting's Purpose, Agenda and Timeframe
- Send agendas prior to meeting
- Start on time
- Summarize with meeting minutes

Group Exercise

Scenario #2: Monitoring and Controlling

Mr. Wil E. Coyote and ACME would like to create a better trap to catch the road runner. It is now time for them to execute the deployment of their rocket catcher 5000, and the ACME builders are on hand continuing to follow the deployment plan. Suddenly a spark in one of the two rocket's boosters sends the ACME team running around in circles as Mr. Coyote thumbs through his manual to try and find out what can be done to fix this issue. Even though he has a list of the ACME team and they have stayed in constant communication, at this point he is not sure how to put out this fire. The Spark ignites a booster and the explosion clears the build site as the road runner happily zips by.

Q. What part of monitoring and controlling was ignored and could have helped to resolve this issue?

Closure Process

Administrative Closure

What is it?

- It includes:
  - Document Lessons Learned
  - Transition to Support
  - Release Resources
  - Reward and Recognition
  - Archive Project Artifacts
  - Vendor/Contractor Access

Closure Process

Administrative Closure: Document Lessons Learned

Why is it important?

- Opportunity to learn
- Help others in similar situation

How to accomplish…

- All stakeholders should participate
- Ask questions pertaining to:
  - Successes/learning opportunities of each phase
  - Issues/Risks that could benefit future projects
  - Discussion regarding resource roles & responsibilities

Closure Process

Administrative Closure: Transition to Support

Why is it important?

- Ensures proper ownership and support post-project

How to accomplish…

- Review & deliver support plan
- Verify length of transition period when ownership transfers
- Transition to support team

Closure Process

Administrative Closure: Release Resources

Why is it important?

- Sense of accomplishment and 'closure'
- Freeing resources to work on other initiatives

How to Accomplish…

- Communicated during Wrap-Up meeting
- Send an email or call resource and supervisor

Closure Process

Administrative Closure: Reward and Recognition

Why is it important?

- Acknowledgment and appreciation of hard work and dedication to project effort
- Encourage resources for future work

How to Accomplish…

- Communicated during Wrap-Up meeting
- Send an email or call resource and supervisor

Closure Process

Administrative Closure: Archive Project Artifacts

Why is it important?

- Reference/easy access in the future
- Reuse: Not to recreate work, leverage past efforts
- Examples: Charter, Scope, Schedule, etc.

How to Accomplish…

- Ensure all project documentation is stored in a central/common location

Closure Process

Administrative Closure: Vendor/Contractor Access

Why is it important?

- Elimination of potential security risk
- Keep systems "clean"

How to Accomplish…

- Work with access groups to remove vendor/contractor accounts to:
  - Physical building access
  - Application & systems access

Group Exercise

Scenario #3: Closure

Mr. Wil E. Coyote deploys exploding boomerangs to catch the road runner. The boomerangs continue to come back to Mr. Wil E. Coyote instead of being secured and maintained by ACME, even after Mr. Coyote, as the project manager, has moved on to new contraptions.

Q. What part of closure should have occurred to take the responsibility of these devices out of Mr. Coyote's paws?

Questions

- Execution Process
- Monitoring & Control Process
- Closure Process