Project Management Overview
Without Project Management

How the customer explained it
How the project leader understood it
How the engineer designed it
How the programmer wrote it
How the sales executive described it
Without Project Management
What is a Project?

• A temporary and one-time endeavor undertaken to create a unique product or service which brings about a beneficial change or added value.

• Differs from operations that are on-going functional work that repetitively produces the same product or service.
What is Project Management?

• Develops and supports standards for how projects are selected, queued, planned, and executed.
• Provides project management services and oversight for IT projects.
• Provides tools and templates to facilitate project tracking, communications and assessments.
• Guides project teams towards adopting project management methodology.
What is Project Management?

• Improves likelihood project results are delivered on time & on budget.
• Controls “scope creep” and manages change.
• Secures project buy-in from stakeholders.
• Enables project teams to focus on the solution.
• Tracks and communicates project progress, risks & changes.
PM Triple Constraint

- **Time** - Amount of time available to complete project. All projects have deadlines or end dates.
- **Cost** - Amount budgeted for the project. Translates to resources – people, equipment, & materials.
- **Scope** – What must be done to produce the project’s requirements.
- Are interdependent and keys to project quality and success.
- Project management is about providing the tools and techniques that enable the project team to organize their work to meet these constraints.
Why Projects Succeed

• Sound project management processes.
• Project tied to organization’s business goals.
• Senior management commitment.
• Good change management.
• Realistic schedule.
• Good stakeholder relationships.
• Skilled team with defined roles and responsibilities.
• Availability of funding.
Why Projects Fail

- Weak Business Case.
- Lack of senior management commitment.
- Inadequate project planning.
- Absence of user involvement.
- New or unfamiliar technology.
- Lack of defined, clear, or concise requirements.
One size does not fit all when it comes to managing projects. Classifying projects ensures they are reviewed, prioritized, and managed in a standardized and consistent manner. Classification happens as part of the project review process.
How Do We Classify?

- Using a classification matrix, projects are classified based on complexity and risk.
- The factors used to determine an idea’s Classification Level are:

<table>
<thead>
<tr>
<th>Clarity of solution</th>
<th>Number of systems involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated duration</td>
<td>Number of users affected</td>
</tr>
<tr>
<td>Estimated resources</td>
<td>Impact on business processes &amp; goals</td>
</tr>
<tr>
<td>Estimated cost</td>
<td>Affects strategic direction of campus or UMS</td>
</tr>
</tbody>
</table>
How Do We Classify?

• Other characteristics may elevate a project’s Classification level. These projects involve systems that:

  • Interface to enterprise systems for data related to Campus Solutions, Finance, Human Resources, Advance, etc.
  • Require converting data from legacy system
  • Require user authentication
  • Access, transmit, process or store highly sensitive data such as Social Security Number
Classification Levels

- Based on Classification Level, different combinations of reviewers/approvers and activities & outputs will be involved, starting with the project review process through project completion.
- There are three Classification Levels:
  - **Level 1**: Low Complexity and Risk
  - **Level 2**: Medium Complexity and Risk
  - **Level 3**: High complexity and risk
Classification Levels

- **Level 1 - Low Complexity and Risk**
  - Simple schedule with few to no dependencies
  - Low total cost
  - Familiar to UMS technology techniques or processes
  - Involves no or limited sensitive data elements
  - Impacts a single department or campus
  - Staffing involves a single campus
  - None to minimal vendor or consulting activity
  - Incremental effect on business processes & goals
Classification Levels

• **Level 2 - Medium Complexity and Risk**
  - Schedule has some dependencies
  - Intermediate total cost
  - Evolving UMS technology techniques or processes
  - Involves a large amount of sensitive data but no critical data
  - Impacts multiple campuses
  - Involves staff from more than one campus
  - Limited potential vendor or consulting activity
  - Clear effect on one or more business processes and goals
Classification Levels

- **Level 3 - High Complexity and Risk**
  - Complex schedule with many dependencies
  - High total cost
  - New to UMS technology, techniques, or processes
  - Extensive impact across campuses
  - Involves critical data such as SSN and HIPAA information
  - Involves staff from all campuses
  - Extensive vendor or consulting activity
  - Affects strategic direction of the UMS
  - System-wide and/or external impact
Role of Project Manager
Project Manager

- Responsible for all project deliverables & communications.
- Develops Project Plan with project team.
- Manages project constraints, scope, quality, time, resources and budget.
- Requires management, leadership, communication, & interpersonal skills.
Project Management Roles

• **Executive Sponsor** - Project advocate, makes decisions on policy, scope, priority, & changes.

• **Steering Committee** - Includes management representatives from key organizations, key stakeholders that have special interest in project outcome.

• **Stakeholders** - Groups & individuals which are impacted by or can impact project outcomes.

• **Project Team** - Responsible for executing tasks & producing deliverables.
Project Phases
Idea

• Starts with an idea to create or revise a service, process, or solution.
• Must identify a project “sponsor” who has means to champion and support the project.
• Project proposer submits Idea Form and/or Project Initiation Form (PIF).
• Project requests are reviewed, approved and prioritized.
Initiate

- Project team is formed.
- Project Manager and team develop Project Charter that:
  - Identifies stakeholders
  - Defines project timeframe
  - Describes project rationale
  - Establishes measures for success
- Phase concludes when sponsor signs-off on Charter.
Plan

- Builds on information captured during initiation phase to develop Project Plan.
- Helps ensure the project is completed on time and on cost with limited surprises and deviations from the originating charter.
- Will consist of the schedule and resources for the project, budget requirements, performance measures, and clear actions for managing change, risk, & communications.
Execute & Control

• Phase where work gets done.
• Team completes work outlined in Project Plan.
• Delivers status reports.
• Monitors and reports on issues and risks.
• Monitors change & creates change requests.
• Updates to project documents where necessary.
• Phase concludes when project deliverable is accepted.
Closeout

- Project team conducts reviews to ensure deliverables are completed to specifications.
- Transfers project deliverable to operations & support staff.
- Project team documents lessons learned.
- Archives project documents for future reference.
- Team celebration!