Project Management

“An Overview for IT”

Author: Kevin Martin & Denise Reeser
Agenda

- Best Practices
  (5 min)
- Preliminary Assessment
  (10 min)
- The Need for Project Management
  (15 min)
- Involvement of EPMO
  (10 min)
- Key Tools
  (30 min)
  - Governance structure for major projects
  - Communication methods
  - Project Planning (who does what by when) & Critical Path planning
  - Risk Mgt and Issue Resolution
- Group Activity: How do you measure success?
  (20 min)
Confusion in the IT World!

Control Objectives of Information Technology

Information Technology Infrastructure Library

Systems Development Life Cycle

Project Management Institute

International Standards Organization
Confusion compared.....

<table>
<thead>
<tr>
<th>IT focused</th>
<th>PMBOK</th>
<th>COBIT</th>
<th>SDLC</th>
<th>ISO</th>
<th>ITIL</th>
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<tbody>
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<td></td>
<td>Some cases</td>
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<td>Yes</td>
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<td>Best Practice</td>
<td>Project Mgmt.</td>
<td>Umbrella</td>
<td>System life cycle</td>
<td>Security (e.g.)</td>
<td>Service Mgmt.</td>
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<td>Framework</td>
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<td>Focus</td>
<td>Projects or Programs</td>
<td>Mgmt. &amp; Governance</td>
<td>Systems Develop.</td>
<td>Standards</td>
<td>Operations</td>
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<td>Timeframe</td>
<td>Aligned with project or program</td>
<td>Continual</td>
<td>Aligned with system</td>
<td>NA</td>
<td>Continual</td>
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<tr>
<td>Ensures quality</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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</table>
THE NEED FOR PROGRAM MANAGEMENT
What Industry Leaders Say…..

“Healthcare has a long history of being under siege. We can never go 12 to 18 months without some big disruption”
Dean Swindle, EVP & CFO, Catholic Health Initiatives

“From the biggest to the smallest [hospitals], they think net revenue will go dramatically down over the next five years, not up. Radical change is coming”
Rush Rudish, Vice Chairman and US Healthcare Providers Sector Leaders, Deloitte & Touche

“It’s tremendous pressure. But what can really buffer and ease the stress is a highly competent team and a team that works well together”
Kathryn McDonagh, Vice President of Executive Relations with Hospira and former health system CEO
The Nine Knowledge Areas of Project Mgt

Communications Management

Scope Management

Time Management

Cost Management

Quality Management

Procurement Management

Integration Management

Source: Project Management Institute, PMI
Benefits of Project Management Methodology

- Completing projects more quickly and cost effectively - The value of reuse: Once the processes, procedures and templates are created, they can be re-used on future projects. This results in reduced project start-up time, a shorter learning curve for project team members and time savings by not having to reinvent processes from scratch on each project.

- Saving effort and cost with proactive scope management - Many projects have difficulty managing scope, which results in additional effort and cost to the project. Having better project management processes will result in being able to manage scope more effectively.

- Better solution “fit” the first time through better planning - Many projects experience problems because there is a gap between what the client expects and what the project delivers. Using a methodology results in better project planning, which gives the team and the sponsor an opportunity to make sure they are in agreement on the major deliverables produced by the project.

Source: HIMSS Project Management Task Force, 2008
Benefits of Project Management Methodology

- **Resolving problems more quickly** - Some teams spend too much time dealing with problems because they do not know how to resolve the problems to begin with. Having a proactive issues management process helps ensure that problems are resolved as quickly as possible.

- **Resolving future risk before the problems occur** - A project methodology includes processes to identify and manage risks. Sound risk management processes will result in potential problems being identified and managed before the problems actually occur.

- **Communicating and managing expectations with clients, team members and stakeholders more effectively** - Many problems on a project can be avoided with proactive communication. In addition, much of the conflict that does arise on a project is not the result of a specific problem, but because of surprises.

Source: HIMSS Project Management Task Force, 2008
Benefits of Project Management Methodology

- **Building a higher quality product the first time** - A formal project management methodology contains quality management processes that will help the team understand the needs of the customer in terms of quality. Once those needs are defined, the team can implement quality control and quality assurance techniques to meet customer expectations.

- **Improved financial management** - This is the result of better project definition, better estimating, more formal budgeting and better tracking of the project actual costs against the budget. All this rigor results in better financial predictability and control.

- **Stopping “bad” projects more quickly** - "Bad" projects are those where the cost-benefit justification no longer makes sense. A project may have started with sound cost-benefit justification. However, if the project is late and over-budget, it may hit a threshold where the business case is no longer valid. Effective project management allows you to see these situations earlier so that you can make better decisions to re-scope or cancel the project.

Source: HIMSS Project Management Task Force, 2008
Benefits of Project Management Methodology

- **More focus on metrics and fact-based decision making** - A solid project management methodology provides guidance to make it easier to collect metrics (measurements). Metrics give you information that helps you determine how effectively and efficiently your team is performing and the level of the quality of your deliverables. Metrics also give you the information necessary to validate whether or not you were successful.

- **Improved work environment** - Successful projects deliver additional intangible benefits:
  - Project teams take more ownership of the project;
  - Morale will be better;
  - The project team will behave with a greater sense of professionalism and self-confidence;
  - People that work on projects with problems tend to be unhappy;
  - People on successful projects tend to feel better about their jobs and themselves.

Source: HIMSS Project Management Task Force, 2008
HIT Project Management Evolution

1980’s: Departmental Automation
- Independent, discrete projects
- Project value departmentally focused and transactionally focused (e.g. improve throughput)
- Minimal project management methodologies/approaches
- Few criteria to determine success/failure; on-time and on-budget indicators

1990’s: Enterprise Automation
- Project inter-dependencies
- Project value now spread across multiple departments; still transactionally focused
- Recognition of Project Management as a discipline
- Continued emphasis on success or failure criteria of on-time and on-budget

Pre-HITECH
- Increased project-interdependencies
- Project value linked to enterprise strategy; more clinical focus (e.g. patient safety)
- Project Managers recognized by title; larger organizations creating PM Departments and PMOs
- Project specific criteria developed to determine project success or failure

HITECH = Health Information Technology for Economic and Clinical Health
HIT Project Management Evolution

HITECH = Health Information Technology for Economic and Clinical Health

**HITECH Vision**
Enable significant & measureable improvements in population health through a transformed healthcare delivery system

**Goals**
- Improve quality, safety & efficiency
- Engage patients & Their families
- Improve care coordination
- Improve population & public health; reduce disparities
- Ensure privacy & security protections

**Health System Strategic Initiatives**
- Structured Information Management
  - Care Coordination
  - Quality Measurement
  - ICD-10, SNOMED, Other Standards
  - HIPAA Privacy & Security
  - Health Information Exchange
  - Public Health

- Meaningful Adoption
- Clinical Decision Support
- Patient Self Service & Health Info Mgt
- Business Intelligence & Analytics
- Cost Accounting
- Revenue Cycle & Risk Management
- Compliance & Reporting

**Program Management**

- Inter-dependent projects of significant size and complexity....programs
- Program value linked to enterprise strategy; “enterprise” defined as beyond four walls
- Increasing number of organizations with structured PMOs and designated Program Managers (as well as Project Managers)
- Program specific success/failure criteria no longer differentiating between IT and non-IT; IT inherent within overall program
What is Project Management?

- **Project** - a temporary group activity designed to produce a unique product, service or result.
  - A project is *temporary* in that it has a defined beginning and end in time, and therefore defined scope and resources.
  - And a project is *unique* in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal (often includes people who don’t usually work together)

- **Project management**, then, is the application of knowledge, skills and techniques to execute projects effectively and efficiently. It’s a strategic competency for organizations, enabling them to tie project results to business goals.

*Source: Project Management Institute (www.PMI.org)*
What is a Project?

- All projects have a beginning, a middle and an end

Projects are NOT ongoing operations or something that just drags on
1. **Initiate** - Determine whether the concept is a viable project.

2. **Plan** - Define the project objectives and the plan to meet those objectives.

3. **Execute** - Perform the activities according to the project plan.

4. **Monitor / Control** - Monitor the progress of the project and make necessary adjustments.

5. **Close** - Resolve major issues and file documentation in the appropriate location.
The Project Management Process

Initiate  Plan  Execute  Monitor / Control  Close

Level of Activity

Start  Time  Finish
PROJECT MANAGEMENT SKILLS & TOOLS
Which ones are most important for projects?

- **Technical skills**
  - Budgeting, Scheduling, Documenting, Problem Solving

- **People Skills**
  - Leading, Motivating, Listening, Negotiating, Communicating

**Great Project Managers are Very Competent in Both Areas**
Characteristics of Good Project Managers

- Excellent communication skills
- Excellent planning skills
- Excellent budgeting skills
- Excellent conflict resolution skills
- Excellent leadership skills
- Excellent motivators
- Excellent management skills
- Excellent interpersonal skills
The Nine Knowledge Areas of Project Management

- Scope Management
- Time Management
- Cost Management
- Quality Management
- Risk Management
- Communications Management
- Human Resources Management
- Procurement Management
- Integration Management

Source: Project Management Institute, PMI
1. Creating a Charter
2. Governance - project structure and workteams
3. Project Plan – creating a plan, using a plan and defining the critical path
5. Risk Management
6. Communication and Documentation – Sharepoint, meeting minutes, email, EPMO, etc
7. Effective PM meetings and status reports
## Alignment: Tools – PM Knowledge Areas

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*Use of all the above in an integrated manner*
Creating a Charter

- Purpose and Justification
- Scope
- Vision
- Governance
- Schedule

- Resource Requirements
- Metrics
- Known Risks & Issues
- Financial Assessment
- Executive Approval
How the customer explained it

How the Project Leader understood it

How the Analyst designed it

How the Programmer wrote it

How the Business Consultant described it

How the project was documented

What operations installed

How the customer was billed

How it was supported

What the customer really needed
Project governance is the management framework within which project decisions are made.

1. Structure – committee structure
2. People – effectiveness of the committee
3. Information – what informs decision-makers

More complex projects require a different structure to enable efficient and effective Project Management.
“Who is responsible for what by when?”

- Creating a plan
  - What needs to be done, then who, then when
  - Group Activity
  - Continually updated – not stagnant
- Using a plan
- Milestones
- Defining the critical path
  - Longest sequence of activities in a project plan which must be completed on time for the project to complete on time.
Project Plan – Defining a Critical Path

<table>
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<tr>
<th>Task</th>
<th>Duration</th>
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<tr>
<td>A</td>
<td>6 days</td>
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<tr>
<td>B</td>
<td>4 days</td>
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<td>C</td>
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<td>D</td>
<td>4 days</td>
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<td>E</td>
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<td>F</td>
<td>3 days</td>
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<tr>
<td>G</td>
<td>4 days</td>
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Good planning can never be underestimated.
### Cost Management (Budgeting)

#### Cost Estimating (justify)

#### Allocation (authorize)

#### Cost & Schedule Control

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<tr>
<th>Month</th>
<th>Capital Budget</th>
<th>Capital Actual</th>
<th>Expendable Project Costs Budget</th>
<th>Expendable Project Costs Actual</th>
<th>TOTAL Budget</th>
<th>TOTAL Actual</th>
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<td>$ -</td>
<td>$ -</td>
<td>$ 45,000</td>
<td>$ 65,000</td>
<td>$ 45,000</td>
<td>$ 65,000</td>
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<td>$ -</td>
<td>$ 60,000</td>
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<td>$ -</td>
<td>$ 50,000</td>
<td>$ -</td>
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<td>$ -</td>
<td>$ 50,000</td>
<td>$ -</td>
<td>$ 50,000</td>
<td>$ -</td>
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<td>$ 442,455</td>
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<td>$ 387,484</td>
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**TOTAL Expendable Project Costs**

**Capital** 2012

**TOTAL** 2012
YOU CAN HAVE IT:

☐ Good
☐ Fast
☐ Cheap

Pick Two
Resource Management

1. Identify the Project Manager
   - How complex is the project?
   - What additional skills does he/she need?

2. Identify skill types and quantities needed to complete project

3. Identify and procure resources

4. Track progress and monitor

<table>
<thead>
<tr>
<th>RESOURCE</th>
<th>Project 1</th>
<th>Project 2</th>
<th>Project 3</th>
<th>Project 4</th>
<th>Project 5</th>
<th>Project 6</th>
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<td>IT Infra Resource 1</td>
<td>20%</td>
<td>30%</td>
<td>30%</td>
<td>50%</td>
<td>20%</td>
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<td>IT Infra Resource 2</td>
<td>50%</td>
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<td>IT Infra Resource 3</td>
<td>30%</td>
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<td>IT Infra Resource 4</td>
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<td>IT Infra Resource 5</td>
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<td>IT Infra Resource 6</td>
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Expected Project Start:
- Project 1: 1/1/2010
- Project 2: 5/1/2010
- Project 3: 5/1/2010
- Project 4: 9/1/2010
- Project 5: 1/1/2011
- Project 6: 2/1/2011
- Project 7: 1/1/2011
- Project 8: 6/1/2011
- Project 9: 6/1/2011
- Project 10: 12/1/2011

Expected Project End:
- Project 1: 3/1/2012
- Project 2: 10/1/2011
- Project 3: 12/1/2011
- Project 4: 1/1/2012
- Project 5: 1/1/2012
- Project 6: 6/1/2012
- Project 7: 6/1/2012
- Project 8: 6/1/2012
- Project 9: 6/1/2012
- Project 10: 9/1/2012

Dept | Sub Dept | RESOURCE
|------|----------|--------
| IT   | Infra    | Resource 1 |
| IT   | Infra    | Resource 2 |
| IT   | Infra    | Resource 3 |
| IT   | Infra    | Resource 4 |
| IT   | Infra    | Resource 5 |
| IT   | Infra    | Resource 6 |
| IT   | Apps     | Resource 7 |
| IT   | Apps     | Resource 8 |
| IT   | Apps     | Resource 9 |
| IT   | Apps     | Resource 10 |
| IT   | Apps     | Resource 11 |
| IT   | Apps     | Resource 12 |
| IT   | Apps     | Resource 13 |
The process for identifying, reviewing and managing risks

- Identify the risk
- Assess the probability and impact of the risk
- Assign the risk
- Mitigate the risk
- Monitor and update
- Close

<table>
<thead>
<tr>
<th>Risk ID</th>
<th>Risk Description</th>
<th>Date Logged</th>
<th>Assigned To</th>
<th>Prob. Of Realization (H, M, L)</th>
<th>Impact If Realized (H, M, L)</th>
<th>Risk Response (A, M, T)</th>
<th>Impecked Area(s)</th>
<th>Mitigating Actions</th>
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<tbody>
<tr>
<td>1</td>
<td>Inadequate number of skilled and knowledgeable resources to assist with implementation</td>
<td>12/22/11</td>
<td>CPOE Mgmt. Team</td>
<td>L (decreased)</td>
<td>H</td>
<td>M</td>
<td>All</td>
<td>Finalize resourcing plan by 1/17/12; funding to execute plan by 1/17/12. Update: review resources post 2/13/12. 4/26/12 UPDATE: All res</td>
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<tr>
<td>2</td>
<td>Inability to secure aforementioned resources in a timely manner</td>
<td>12/22/11</td>
<td>CPOE Mgmt. Team</td>
<td>H (increased)</td>
<td>H</td>
<td>M</td>
<td>All</td>
<td>Finalize resourcing plan; Allocate execute plan; Identify potential res interview and execute by 2/1/12.</td>
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<tr>
<td>3</td>
<td>Timing of CPOE code upgrade and impact to CPOE build schedule</td>
<td>12/22/11</td>
<td>IT</td>
<td>L</td>
<td>H</td>
<td>M</td>
<td>All</td>
<td>20-120 day work effort (June, July, Sept.); 4/26/12 UPDATE: There is opportunity to start in June with 12</td>
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<tr>
<td>4</td>
<td>Domain strategy executed</td>
<td>12/22/11</td>
<td>IT</td>
<td>L</td>
<td>M</td>
<td>M</td>
<td>All</td>
<td>Define domains – get to paper; new training domain to be refreshed. Define work teams for each respective by 1/31/12. Document operational propose work flows; develop conv plans as necessary. Aforementioned mgmt, agen topics for 3/21 and meeting; go-forward strategy must be decided by 3/31/12. 4/26/12 UPDATE.</td>
</tr>
<tr>
<td>5</td>
<td>Areas with disparate documentation systems: Anesthesia, Cardiology, and Procedural Cardiology</td>
<td>12/22/11 and expanded 2/9/12</td>
<td>Respectively Workflows and CPOE Mgmt. Team</td>
<td>L (decreased)</td>
<td>H</td>
<td>M</td>
<td>Specific areas as referenced</td>
<td>Need sufficient number of trainers implementation – reviewing resou week of 2/13/12; finalize go-live needs; plan to educate to be dealt with Tier 1 resources. Education course to be vetted; Develop comprehensive training architecture and plan. Str</td>
</tr>
<tr>
<td>6</td>
<td>Inadequate number of skilled and knowledgeable resources to assist with training and education</td>
<td>1/5/12</td>
<td>CPOE Mgmt. Team</td>
<td>M (decreased)</td>
<td>H</td>
<td>M</td>
<td>All</td>
<td>Need sufficient number of trainers implementation – reviewing resou week of 2/13/12; finalize go-live needs; plan to educate to be dealt with Tier 1 resources. Education course to be vetted; Develop comprehensive training architecture and plan. Str</td>
</tr>
</tbody>
</table>
Typical avenues...

- Email
- Face-to-face (meetings)

There are other means...

- SharePoint
- Meeting agendas
- Meeting minutes (Decisions vs Complete Documentation)
- Updates using the standard tools/templates (risk matrix, project plan, budget)
- Others??
The power of an agenda (what, who, when)

Key decisions to be made

Documentation and distribution of those decisions

Follow up on activities or outstanding items from previous meetings

Close with a plan of action / next steps
### “Straw-man Approach”: How much is enough? (Integration Management example)

<table>
<thead>
<tr>
<th>Area</th>
<th>Priority</th>
<th>Priority</th>
<th>Priority</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Minor investment, informal schedule goals, low organizational priority and visibility.</td>
<td>Moderate investment, definite schedule target, some organizational priority and visibility.</td>
<td>Significant investment, important schedule goals, medium organizational priority and visibility.</td>
<td>Major investment, critical schedule goals, substantial organizational priority and visibility, significant technical and cost risks.</td>
<td></td>
</tr>
<tr>
<td><strong>Project Charter</strong></td>
<td>Prepare a one page memo of understanding between the sponsor and the PM outlining project objectives, resources, commitments, and constraints.</td>
<td>Identify quantifiable objectives, cost and schedule targets; outline staffing commitments, funding, and assets.</td>
<td>Define specific performance goals and cost and schedule thresholds; describe PM authority and organizational commitment.</td>
<td>Define PM responsibilities and authority; describe specific objectives and make express commitments of staffing, funds, and assets.</td>
</tr>
<tr>
<td><strong>Life Cycle Phases and Milestones</strong></td>
<td>Define basic phases, milestones, decision points, accomplishments, and deliverables.</td>
<td>Prepare project plan inputs with discussion of phases, deliverables, objectives and success criteria; establish immediate milestones within project phases.</td>
<td>Include in project plan linkages between milestone approval reviews and documents, updated estimates, test results, etc.</td>
<td>Define event-based milestones; establish milestone exit criteria; link to deliverables, baseline document updates, test results, and management reviews.</td>
</tr>
<tr>
<td><strong>Project Stakeholders</strong></td>
<td>Identify project stakeholders (customers, sponsors, users, etc.) and bulletize their interests and objectives on one page; review the project plan to ensure stakeholder satisfaction will be achieved.</td>
<td>Map stakeholder interests to specific initiatives to ensure satisfaction; develop, maintain, and post team success metrics; plan proactive stakeholder communications.</td>
<td>Prepare stakeholder management plan, and allocate staff and budget to periodic reassessments and corrective actions; focus specific initiatives to achieve stakeholder satisfaction.</td>
<td>Prepare and update a structured stakeholder analysis supporting a stakeholder management plan; map to the quality plan, risk management plan, and to project reporting initiatives.</td>
</tr>
<tr>
<td><strong>The Project Plan</strong></td>
<td>Summarize project objectives, approach, time constraints, cost estimates, and staffing plan; ensure these fit together and are realistic and achievable; define milestones; and link tasks to owners and deliverables.</td>
<td>Employ planning process to build team ownership and facilitate peer review; apply systematic methods to assess cost and schedule realism; plan more heavily in risk areas; apply all PM principles in plan.</td>
<td>Prepare a plan that links the requirements, task plans, timelines, cost estimates, staffing, deliverables, and test plan; make sure cost, scope, and time are bounded; define success criteria for milestones.</td>
<td>Produce an integrated family of documents defining all project activities and disciplines; plan for mapping and traceability throughout major documents; systematically address all PMBOK areas.</td>
</tr>
<tr>
<td><strong>Project Management Methodology</strong></td>
<td>Apply sound project management principles such as: clearly documented requirements, a realistic plan, project baseline controls, and periodic reviews; maintain a PM notebook.</td>
<td>Include outline of proposed project management methodology in project plan document; identify vital PM systems and procedures.</td>
<td>Document PM approach, including baseline management, reviews, data collection, project metrics, and control responsibilities; monitor and report status of PM implementation.</td>
<td>Prepare project management plan describing methodology, reviews, baseline controls, and organizational roles and responsibilities; establish metrics to track integrity of PM disciplines.</td>
</tr>
</tbody>
</table>

How will you measure success?

- Break into 4 groups
- Based on what was reviewed today:
  1. What 3 areas of PMBOK (e.g. risk, cost, etc.) will be the most difficult to manage and why?
  2. What are the top 3 tools you feel will ensure a successful project?
  3. What are 3 key take-aways from today?