

Project Management: Getting Started Guide

If you are new to project management or need a refresher, this quick start guide will walk you through the four stages of project management. The Project Management Office offers helpful tools for each phase of project management. After reviewing this quick start guide, consider using the templates from the Lean or Traditional Project Management Methodology to complete your projects. Look through the stages below for questions to consider during each stage.

Initiate- Stage 1

During the initiating stage of project management, you will identify basic project information, consider the initial risks and complexity, then seek approval for the project. This stage is typically documented in a project charter.

For smaller projects, simply be sure that you and the customer have the same answers to these questions before you start planning and working. For larger projects, there are usually so many people involved that writing everything down actually saves time up front and later in the project. Remember, lack of communication is the #1 killer of projects, and documentation is the easiest way to communicate with many busy people located in different work groups.

Identify the problem this project is intended to solve

- What problem are you trying to solve?
- How are you currently addressing this problem?
- What other options have you explored?
- Can you express the solution to the problem in a Vision statement that is specific, measurable, attainable, relevant, and time-bound?

Describe how the problem will be solved

- What is your approach to solving the problem?
- Describe the project's delivered product or service by describing a few key features.

Determine the project scope

- Which problems will be solved in this project?
- Which problems are **not** to be solved in this project?

Describe the level of effort, schedule, and budget required

- How long will it take? Are there critical go/**no go** decision points?
- How many people are necessary, for how long, and at what percentage of their time?
- How much do you think it will cost? Is that amount budgeted?

Initiate- Stage 1 Continued

Identify key stakeholders, roles, and responsibilities

- Who originated or requested this project? Are they the final authority for acceptance?
- Who benefits, and who may be hurt by this project?
- Who will help you, how can they help you, and how will they benefit from the project?

Identify the types of resources needed

- What types of staff skillsets/resources do you need for this project? Will they need training?
- What IT resources do you have or will you need to acquire (e.g., infrastructure, facilities, equipment, support, or tools)?

Determine funding and authorization for the project

- Is there funding available?
- Will external oversight bodies and regulations/policies affect this project? How?

Identify the organizational impact and security needs of the project

- Is this proposed solution mission critical?
- Will the project have institution-wide visibility?
- Do you need resources from other groups?
- Is this project strategic in nature?
- Does the proposed solution involve sensitive or confidential data?

Identify high level risks that may affect the project

- What could go wrong? How will you prevent these events from occurring or deal with them if they do occur?
- What could go right? How will you exploit or enhance these events?
- What event(s) would require you to consider (with the Sponsor) termination of the project?

Identify assumptions that are being made about the current conditions surrounding the project

- What assumptions underlie your project estimates?
- What assumptions must be true for the project to succeed?

State the current environmental conditions and constraints

- Are there any roadblocks in your way?
- Are certain factors out of your control?

Plan - Stage 2

During the planning stage of project management you will refine the details from the project charter and develop the details needed for project completion. This stage is documented using a project plan (and supporting documents where necessary). There are two benefits from taking this approach.

1. People give the maximum consideration to ideas when they write them down.
2. Larger, more complex projects, the project plan provides a source for consistent source of information for team members and stakeholders.

Here are some questions to help guide you through this stage.

Determine the project basics

- When do you need this solution?
- What methods, tools, and techniques will be used during project planning?
- Do you need to order any components or tools, or contract with outside vendors?
- Will you use a project management/communication tool?
- What are your current effort, schedule, and budget estimates?

Develop/refine the project scope

- What is included in this project?
- What is *not* included in this project?
- What assumptions are you making that must be true for your project to succeed?
- What limitations or restrictions will affect your project?
- What criteria need to be met for the results of your project to be considered complete?
- What activities need to be performed to complete the project?
- Are the activities broken down so they can be assigned to individuals?
- How long will the activities take, who will do them, and by when?

Determine the project schedule

- Have project activities been sequenced to account for interdependencies?
- What is the minimum time needed to complete the activities given the interdependencies you've identified?
- Are there any blackout dates when project work cannot be done such as auditor/external demands, semesters, holidays, and vacations?
- What important dates have been identified for completing project work?
- Have you touched base with your purchasing, legal, infrastructure, and other supporting professionals regarding their schedule?

Plan- Stage 2 Continued

Determine the project budget

- Will you need to allocate the budget purchases due to budget cycle requirements?
- Will you spend the funds monthly? Quarterly?
- Are there any special financial processes executed at the end of the year? Fiscal rollover? Capital budget?

Determine how project quality will be defined and managed.

- What regulations, standards, and policies do you need to follow?
- Did you considering purchasing rules if you are doing procurement?
- What activities will you perform to verify project deliverables are of acceptable quality and are complete and correct?
- What activities will you perform to verify that the processes used to manage and create project deliverables are followed and are effective?
- How will you test the performance of the new system or service?
- What tools will you use?
- Who will be involved?
- How will you report quality findings?
- How often and when are you going to perform continuous process improvement to improve your project processes?

Determine project resources

- Who is going to help you with this project?
- Do the project team members have other duties?
- What percentages of team members' time will be dedicated to the project?
- Do team members need training?

Identify project communication plans

- Who needs to know about this project?
- Does the project affect other users, systems, or external groups?
- What is their stake in the project?
- How many different communication channels do you have?
- How do they want/need to receive information about the project?
- How frequently do they want/need to receive information about the project?
- How will project team members report project activities and status?
- How will you report project performance and corrective actions?

Plan- Stage 2 Continued

Determine how project risks will be identified and managed

- How will you identify the project risks?
- What area is affected by each individual risk?
- What is the impact on the organization if the risk occurs (i.e. an issue)?
- Is the risk one you can accept, transfer away, mitigate, or avoid?
- Is there an alternative approach to deal with issues?
- Is the risk always present or does it have a lifespan?
- How will you monitor and track risks?
- At what point would the risks indicate a re-evaluation of the project plan?

Determine how project integration activities will be handled

- How will you deal with changes to the project?
- How will you handle configuration and release during development?
- How will you address information security requirements?
- Do you have the necessary advertising, infrastructure, financial, security, and legal activities in place for production?
- What communication between groups/teams is required to facilitate the first release?
- How will this project be transitioned into operations?
- What are your plans for disaster recovery and business continuity?

Execute/Monitor & Control - Stage 3

During the execution stage, you will execute the project with continuous monitoring and control. Documentation of this stage can include a variety of logs and project plan updates depending on the size and complexity of the project. Below is a list of questions to help guide you through this stage.

Document changes

- What requested and approved changes have occurred? What was their impact?
- Have any process improvements been put into place? What was their impact?

Record budget activities

- Where changes were made to the project budget?
- How do actual expenses compare to estimated expenses?

Execute/Monitor & Control- Stage 3 Continued

Record quality activities

- What activities were performed to verify the quality of processes and deliverables?
- What activities were performed to validate that project results are fit for the intended use?
- What continuous process improvement activities were performed?

Record communication activities and any issues encountered

- What kind of regular status updates did you provide and how?
- How did you handle exceptional events?
- How did you show overall progress?
- How did you track assignments and execution of tasks?

Record risks activities

- What risk events occurred?
- What actions were taken in response? At what impact?
- Which risks have expired?

Record reporting activities

- What accomplishments were made in the last reporting period?
- What accomplishments are planned for the next reporting period?
- How do actual schedule and budget figures compare to planned figures?

Close - Stage 4

During the closing stage of project management you will review the recently completed project with the stakeholders, project sponsor, and project team. To document this stage complete a project closing report. Remember, the PMO offers templates in the Lean or Traditional Project Management Methodology to help you complete your projects.

Final project acceptance

- Did the project meet the original and final goals and objectives?
- Was the project completed on time and within budget?
- Did the project result meet specifications? Is it fit for use?

Close- Stage 4 Continued

Project lessons learned

- Are there any lessons learned that could be vital for the next project execution?
- Are there any recommended changes to project processes?

Project artifacts

- Have project documents and other artifacts been properly completed, archived, or disposed as appropriate?
- Have procurement documents been properly completed, archived, or disposed as appropriate?

Project benefits and impact

- What benefits were realized for the organization?
- Were there benefits that were not anticipated in the project charter?

Closing checklist

- Has the project been turned over to maintenance and operations staff?
- Has all required training been completed?
- Have all long-term support considerations been addressed?
- Are disaster recovery and business continuity plans in place?

Open issues

- Is all the project work complete?
- What issues still need to be addressed?
- What is the time frame for addressing them?
- Who will be responsible for addressing them?