

THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Project Management *for Everyone*



Contact Information

Project Management for Everyone

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BUSINESS MANAGEMENT
& ANALYSIS GROUP (BMAG)

FINANCE DIVISION



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Objectives

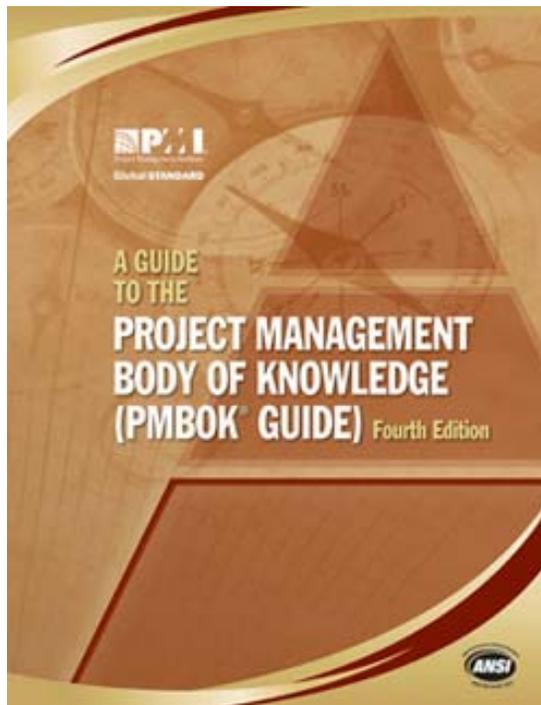
Project Management for Everyone

- ❑ Basic understanding of project management principles
- ❑ Share tools and techniques of formal project management that can be used in daily tasks and projects



Project Management Institute

Project Management for Everyone



- ❑ PMI is an aggregation of best practices from thousands of professional project managers
- ❑ Principles in this session are based on PMI methodologies, there are other methodologies
- ❑ Organizations typically use these as a basis for developing custom project management processes



www.pmi.org

GW MS in Project Management

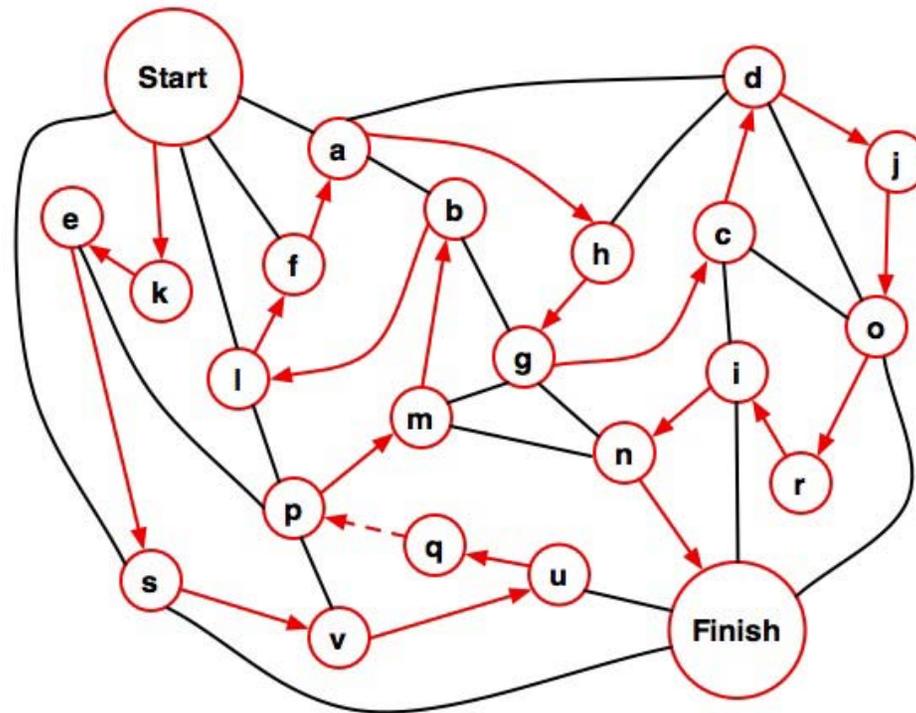
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business.gwu.edu/programs/specialized-masters/mspm/

Project Management Principles

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Definition of a Project

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Project - A *temporary* endeavor undertaken to create a *unique* product, service, or result.

Temporary / Not Ongoing

- Definite beginning and end
- Does not mean a short duration

Unique

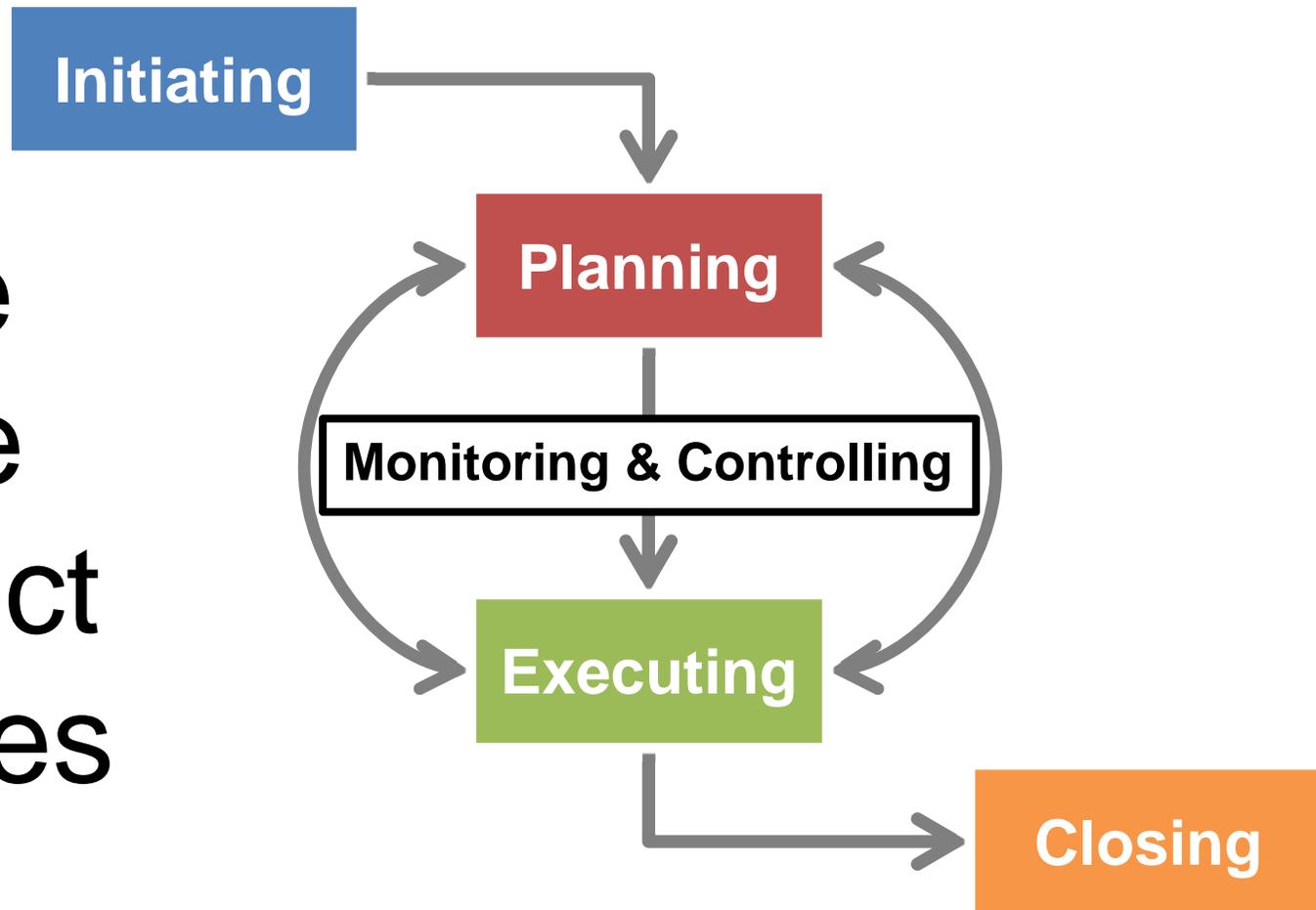
- Outcome is a unique deliverable
- Could come in the form of either products, services or results



Project Life Cycle

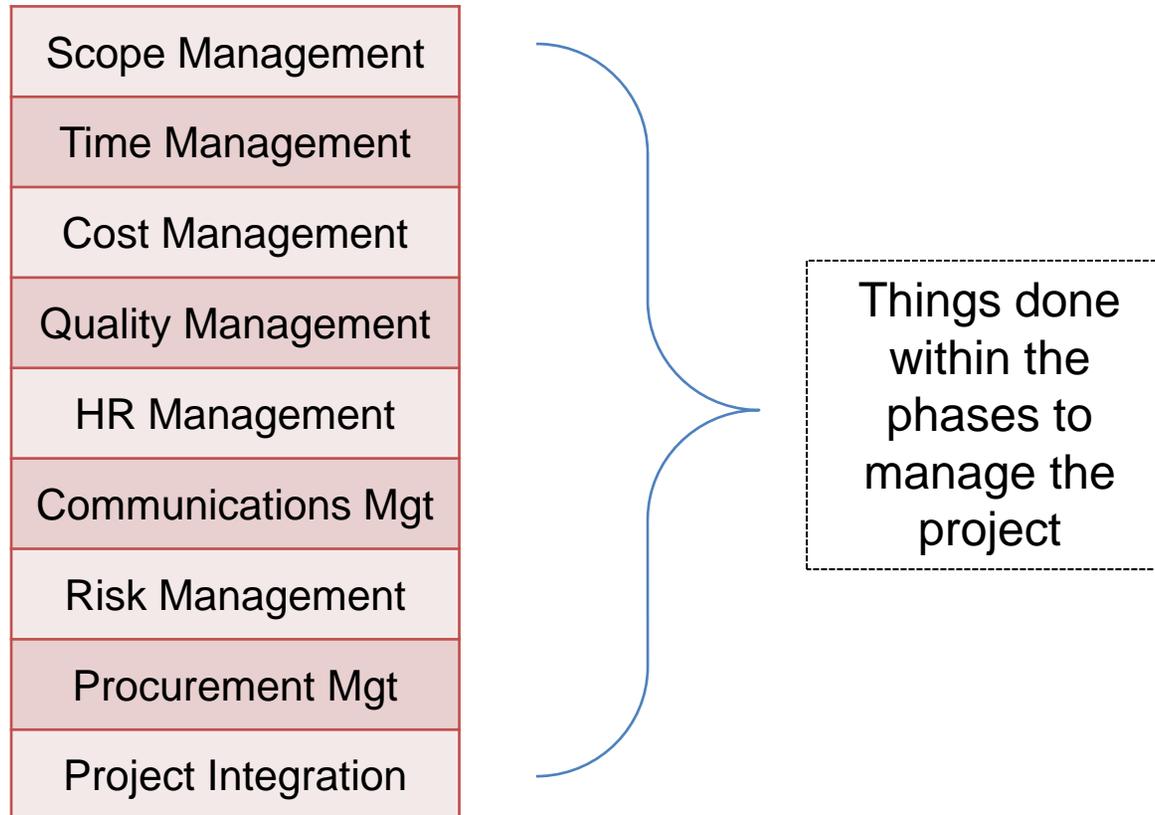
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The
Five
Project
Phases



Project Management Functions

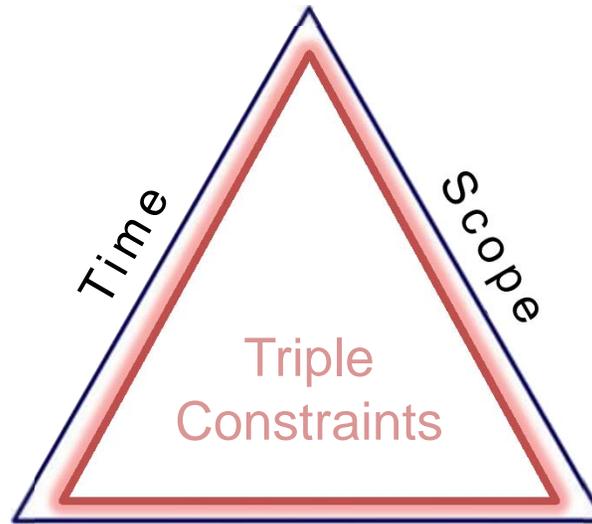
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~ PMI refers to these as *Knowledge Areas* ~

Triple Constraints

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Resources



- ✓ Dates
- ✓ Deliverables
- ✓ Dollars

~ Managing these is the primary responsibility of the PM ~

PM in Practical Terms

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Define

Clarify the request
and objectives

Initiating

Plan

Develop the
specific approach

Planning

Manage

Task, action,
communication &
resource management

Monitoring &
Controlling

Executing

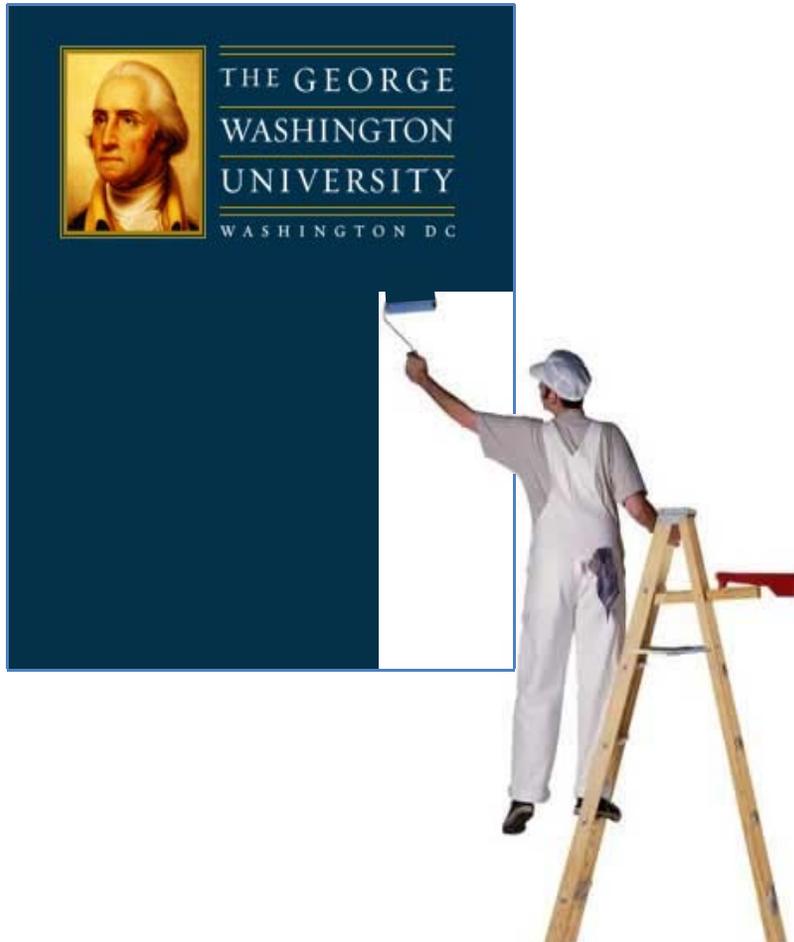
Review

Were expectations
met?

Closing

Day to Day Use of PM

Project Management for Everyone



What are some struggles often experienced in projects?

Define

Initiating

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- Clarify the request / initiative
- Identify stakeholders
- Define the requirements



Define - Clarification

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PM Tool

Project Charter

The George Washington University
PMLC
Project Management Life Cycle

The George Washington University
[Project Name]
Project Charter

Prepared By: [Name(s) of Preparer(s)]
Version: [Version Number #]
Date: [Date]
Project Owner: [Name & Title of Project Owner]
[Department]
Process Initiator: [Name of Process Initiator]
[Department]
[Contact Information]

STATUS: Draft
 Pending for Document Approval
 Approved
 Unapproved

Defines high-level scope, exclusions, objectives, milestones & timeline

Everyday Tool

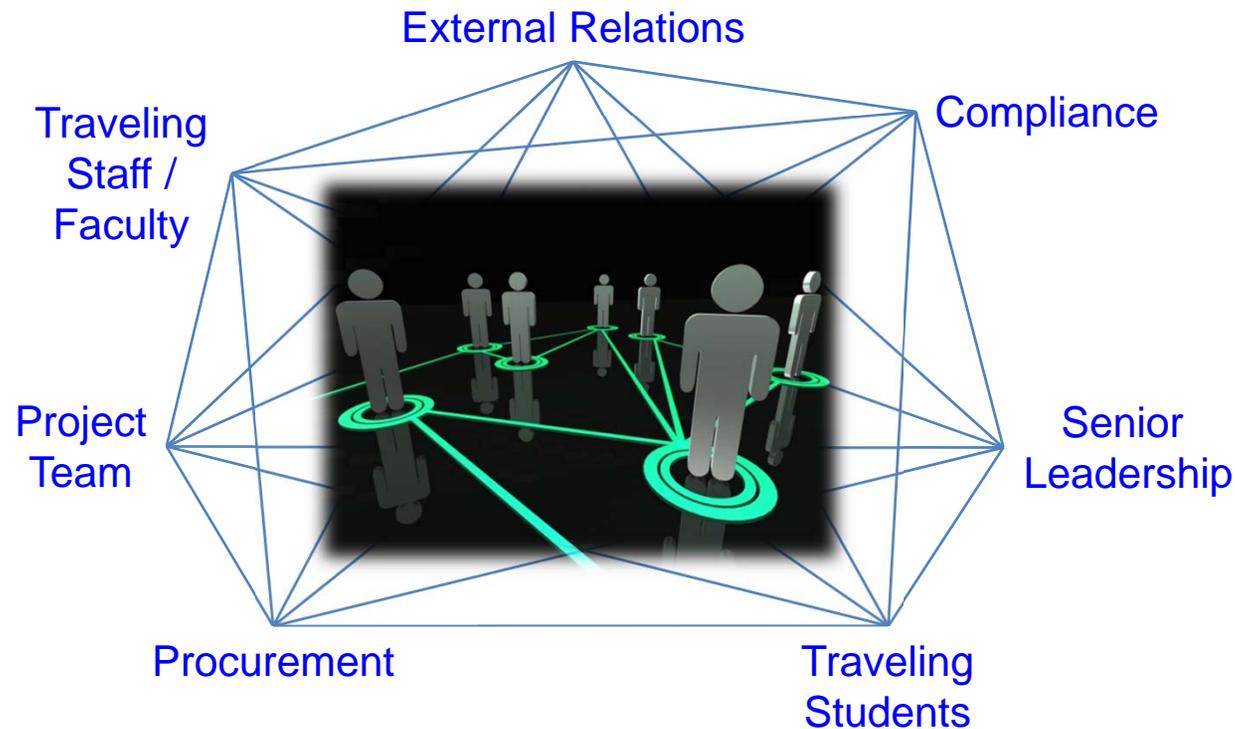
Email / Memo

- Document objectives
- Send to requester to validate
- Writing down helps clarify
- Get agreement!!

Define - Identify Stakeholders

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Project Stakeholder { *People or groups positively or negatively affected by the project outcome.*



Stakeholders may or may not exert direct influence over the project

Define - Identify Stakeholders

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PM Tool

Everyday Tool

Stakeholder Matrix

Name	Title	Department / Group	Category	Contact	Impact (H/M/L)	Influence (H/M/L)
Adam Donaldson	Manager	Business Management & Analysis Group	Project Team	202-994-6867 adonald@gwu.edu	H	M
Sally Doe	Executive Director	Procurement	Project Owner	703-555-1212 sally_doe@gwu.edu	M	M
John Doe	Travel Manager	Procurement	Subject Matter Expert	202-555-1212 john_doe@gwu.edu	H	M
Jane Doe	Compliance Manager	Compliance	Subject Matter Expert	202-555-1213 jane_doe@gwu.edu	H	L
Bill Doe	Director	School Budget Officers	Stakeholder	202-555-1214 bill_doe@gwu.edu	M	L

- Identify and track key stakeholders
- Determine importance in order to gauge how to manage
- Ensure thoroughness of communications planning

Define - Requirements

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Requirements Document

THE GEORGE WASHINGTON UNIVERSITY
PMLC
Project Management Life Cycle

The George Washington University
[Project Name]
Business Requirements Document

Prepared By: [Name(s) of Preparer(s)]
Version: [Version Number #X]
Date: [Date]
Project Owner: [Name & Title of Project Owner] [Department]
Project Manager: [Name of Project Manager] [Department] [Contact Information]

STATUS: In Progress
 Pending for Document Approval
 Approved
 Disapproved

Documents the “what” of the initiative / task and breaks into individually deliverable items

Everyday Tool

Requirements List

#	Requirement Name / Description	Category
1	Travel policy updates shall specify preferred rental car vendors	Travel Policy
2	Travel policy update shall clarify rental car insurance policies	Travel Policy
3	Travel policy shall revise and clarify business class travel rules for international flights	Travel Policy
4	Entertainment policy shall include a per diem and clarify amounts	Entertainment Policy
5	Entertainment policy shall specify exclusions to per diem	Entertainment Policy

- List the “what” items required in the final solution
- Iterative process often requiring multiple interviews
- Critical to defining the solution

Define

Initiating

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- ☑ Clarification Memo
- ☑ Stakeholder Matrix
- ☑ Requirements List



Plan

Planning

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- ❑ Organize and plan
- ❑ Determine tasks to be done
- ❑ Create a schedule
- ❑ Plan communications

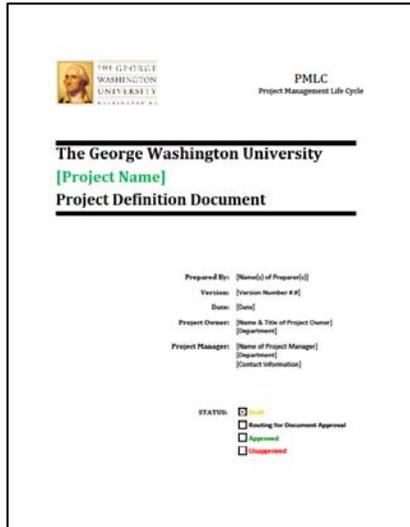


Plan – Project Management Plan

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PM Tool

Project Management Plan



Establishes plan for planning, execution, monitoring & closing, including all subsidiary plans

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Project Workbook

The image is a screenshot of a Microsoft Excel spreadsheet titled 'Example Project Workbook'. The spreadsheet has four columns: '#', 'Requirement Name / Description', 'Category', and 'Benefit'. It contains four rows of data, numbered 1 through 4. The first row is a header row. The second row describes a requirement for incorporating PMI phases. The third row describes breaking the process into sub-phases. The fourth row describes phase reviews. The fifth row describes single ownership of projects.

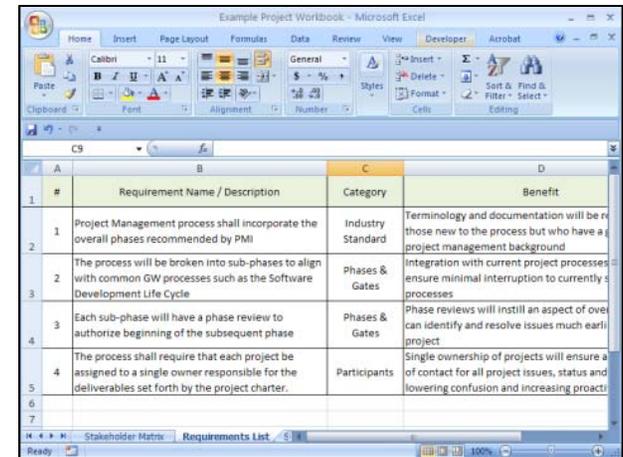
#	Requirement Name / Description	Category	Benefit
1	Project Management process shall incorporate the overall phases recommended by PMI	Industry Standard	Terminology and documentation will be re those new to the process but who have a g project management background
2	The process will be broken into sub-phases to align with common GW processes such as the Software Development Life Cycle	Phases & Gates	Integration with current project processes ensure minimal interruption to currently s processes
3	Each sub-phase will have a phase review to authorize beginning of the subsequent phase	Phases & Gates	Phase reviews will instill an aspect of over can identify and resolve issues much earli project
4	The process shall require that each project be assigned to a single owner responsible for the deliverables set forth by the project charter.	Participants	Single ownership of projects will ensure a of contact for all project issues, status and lowering confusion and increasing proacti



“Project” Workbook

Project Management for Everyone

- Include all “project” information
 - Scope / Objectives
 - Stakeholders / Contacts
 - Requirements
 - Schedule, Milestones & Deliverables
 - Action Items and Issues
- Central location for all project info
 - Excel workbook or other similar tool
 - Local / Shared Folder
- Living document
- Serves as a template / historical artifact for similar future endeavors



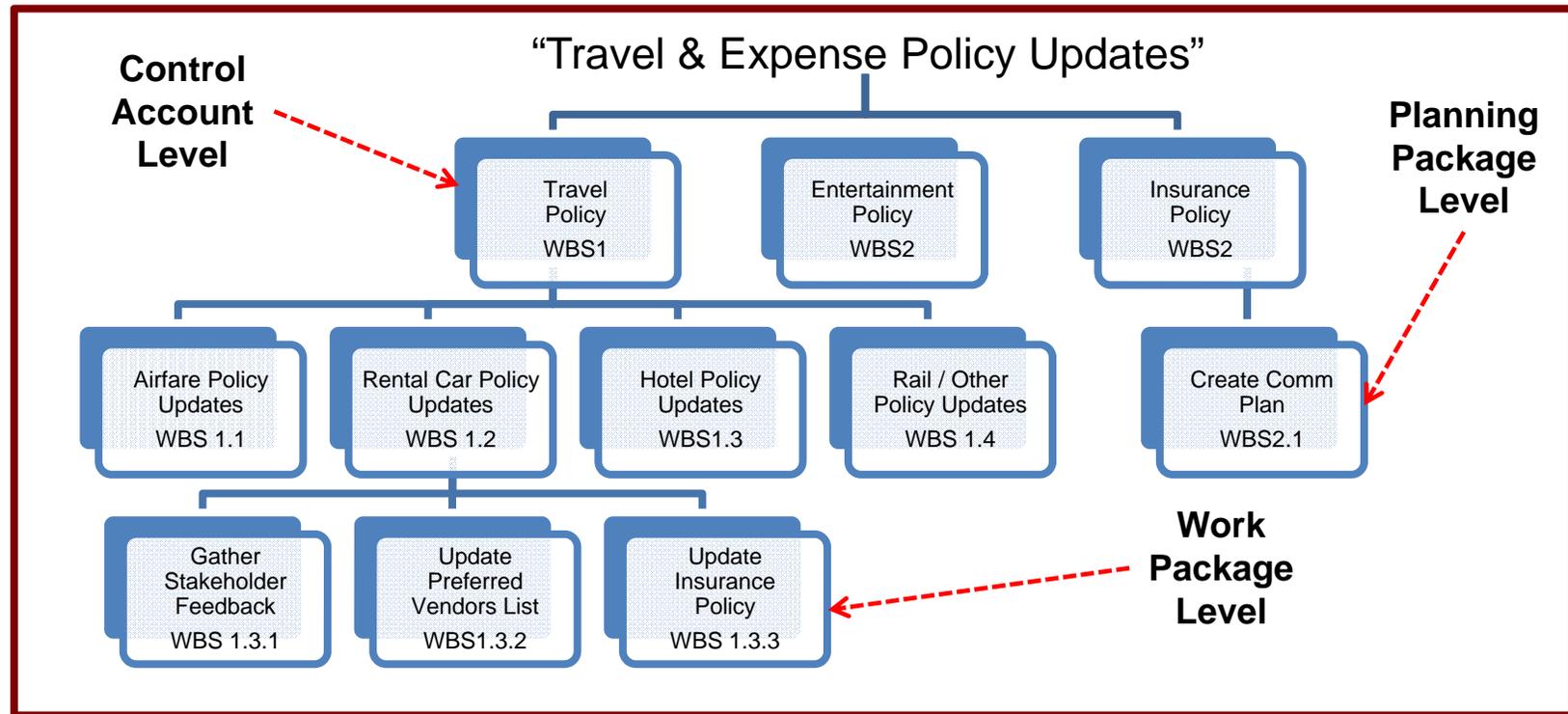
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Plan – Task Identification

Project Management for Everyone

PM Tool

Everyday Tool



- Breaks deliverables into manageable work packages

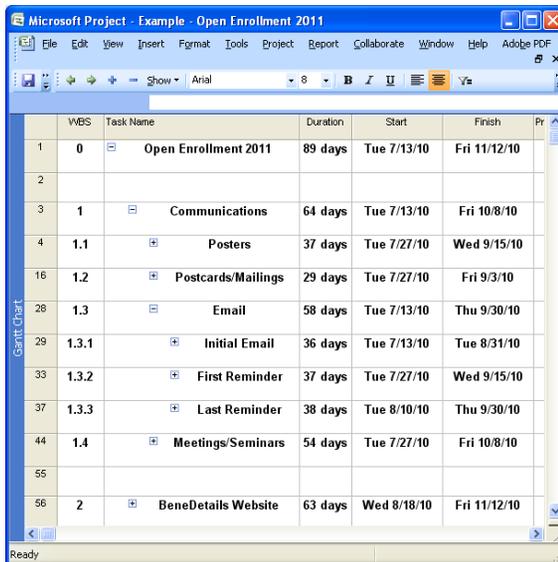
- Ensures we don't forget or omit important tasks

Plan – Schedule

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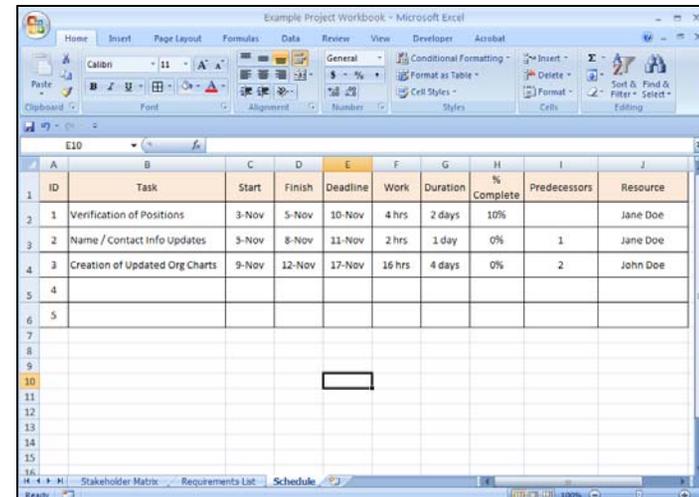
Formal Project Schedule



WBS	Task Name	Duration	Start	Finish
0	Open Enrollment 2011	89 days	Tue 7/13/10	Fri 11/12/10
1	Communications	64 days	Tue 7/13/10	Fri 10/8/10
1.1	Posters	37 days	Tue 7/27/10	Wed 9/15/10
1.2	Postcards/Mailings	29 days	Tue 7/27/10	Fri 9/3/10
1.3	Email	58 days	Tue 7/13/10	Thu 9/30/10
1.3.1	Initial Email	36 days	Tue 7/13/10	Tue 8/31/10
1.3.2	First Reminder	37 days	Tue 7/27/10	Wed 9/15/10
1.3.3	Last Reminder	38 days	Tue 8/10/10	Thu 9/30/10
1.4	Meetings/Seminars	54 days	Tue 7/27/10	Fri 10/8/10
2	BeneDetails Website	63 days	Wed 8/18/10	Fri 11/12/10

Everyday Tool

Task List / Schedule



ID	Task	Start	Finish	Deadline	Work	Duration	% Complete	Predecessors	Resource
1	Verification of Positions	3-Nov	5-Nov	10-Nov	4 hrs	2 days	10%		Jane Doe
2	Name / Contact Info Updates	3-Nov	8-Nov	11-Nov	2 hrs	1 day	0%	1	Jane Doe
3	Creation of Updated Org Charts	9-Nov	12-Nov	17-Nov	16 hrs	4 days	0%	2	John Doe

Sequences & defines project tasks and monitors status of project against milestones / baselines



Plan – Schedule

Project Management for Everyone

Task List / Schedule

ID	Task	Start	Finish	Deadline	Work	Duration	% Cmpl	Predecessors	Resource
	Rental Car Policy Updates	3-Jun	5-Jun	-	30 hrs	14 days	7%		
1	Gather Stakeholder Feedback	3-Jun	7-Jun	-	8 hrs	5 days	20%		John Doe
2	Update Preferred Vendor Information	10-Jun	14-Jun	-	16 hrs	5 days	0%	1	John Doe
3	Update Rental Car Insurance Instructions / Policy	17-Jun	18-Jun	-	2 hrs	2 days	0%	2	Sally Doe
4	Dept Approval of Rental Car Section	19-Jun	20-Jun	-	4 hrs	2 days	0%	3	Sally Doe
5	Rental Car Section Updated Ready for Approval Process	21-Jun	21-Jun	21-Jun	-	-	0%	4	

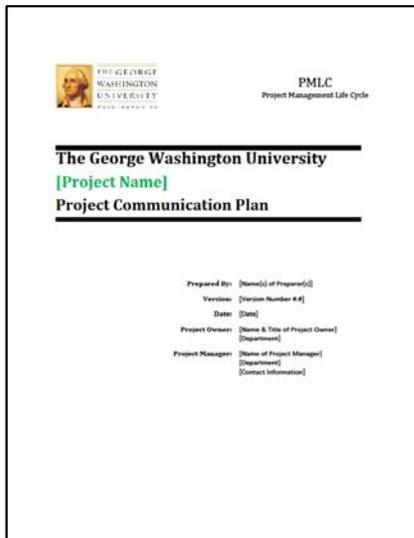
- Excel or other common tool
- Turn WBS work packages into tasks
- Clearly identify major milestones
- Identify dependencies – one task which relies on another

Plan – Communications Matrix

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PM Tool

Communications Plan



Documents the detailed plan for communicating with all stakeholders

Everyday Tool

Communications Matrix

The image is a screenshot of a Microsoft Excel spreadsheet titled 'Example Project Workbook - Microsoft Excel'. The spreadsheet displays a Communications Matrix with the following data:

#	Communication	Medium	Delivery Date	Frequency	Audience	Reviewer	Owner	Status
1	Notification of department heads efforts to update web	Email	5-Nov	One-Time	Directors in Finance	Jane Doe	John Doe	Open
2	Solicitation to entire department for content	Email	8-Nov	One-Time	Finance	Jane Doe	John Doe	Open
3	Communicate changes to UWS / External Relations	Meeting	12-Nov	Bi-Weekly	IT, External Relations	N/A	Adam Donaldson	Open
4	Department web content update review	Meeting	8-Nov	Weekly	Finance	N/A	Adam Donaldson	Open
5	Status Report	Memo	9-Nov	Weekly	Finance SAVP	John Smith	Jane Doe	Open



Plan – Communications Matrix

Project Management for Everyone

Communications Matrix

#	Communication	Medium	Delivery Date	Frequency	Audience	Reviewer	Owner	Status
1	Project Kickoff w/ Stakeholders	Meeting	1-Jun	Weekly	Finance Directors Department Heads	N/A	Adam Donaldson	Open
2	Notification of Policy Update Efforts	Email	15-Jun	One Time	Faculty & Staff via Infomail	Jane Doe	John Doe	Open
3	Focus Groups for Update Gathering	Meeting	22-Jun	One Time	Finance Directors / Departments	N/A	John Doe	Open
4	Notification of New Policy When Effetive	Email	1-Jul	One Time	Finance	N/A	John Doe	Open
5	Status Report	Memo	1-Jun through 1 Jul	Weekly	Executive VP & Treasurer	Jane Doe	Adam Donaldson	Open

- Target communications towards stakeholders identified
- Consider both “internal” and “external” communications
- One of the most vital efforts in any project

Plan

Planning

Project Management for Everyone

- ☑ Project Workbook
- ☑ Task Identification / WBS
- ☑ Task List / Schedule
- ☑ Communications Matrix



Manage

Project Management for Everyone

Executing

Monitoring

- ❑ Executing schedule tasks
- ❑ Managing action items & issues
- ❑ Report status



Manage – Actions & Issues

Project Management for Everyone

PM Tool

Everyday Tool

Action & Issues Register

Action #	Priority	Description	Owner	Open Date	Next Update Date	Status	Close Date
4	Low	Finish Kickoff Presentation and schedule the kickoff meeting	Adam	5/25/15	5/30/15	Closed	
5	Med	Contact Rental Car vendor re: Insurance. Get Rental Car vendor contact info from John	Bill	6/1/15	6/5/15	Open	
6	Med	Gather language for "preferred choice" airline provider for international flight section of policy	Dave	6/1/15	6/9/15	Open	
7	High	Coordinate schedules for the policy approval meetings	Adam	6/1/15	6/12/15	Open	
8	Med	Notify Compliance that we will be requesting approvals after 6/21. Need to get process started.	Adam	6/7/15	6/14/15	Open	
9	Med	Onboard the new Procurement Manager on the project.	Sally	6/9/15	6/16/15	Open	

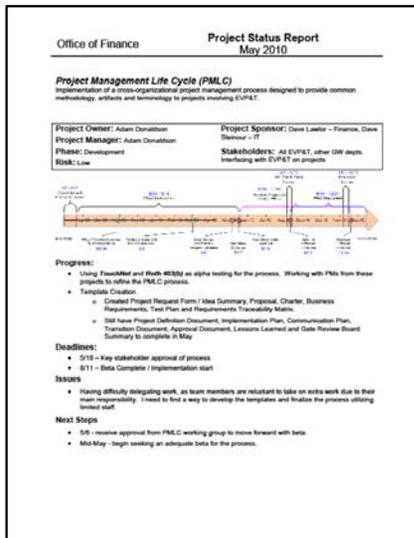
- Log and track all actions and issues – ensures accountability
- Tasks are scheduled – Action Items “pop up”

Communicate – Status Report

Project Management for Everyone

PM Tool

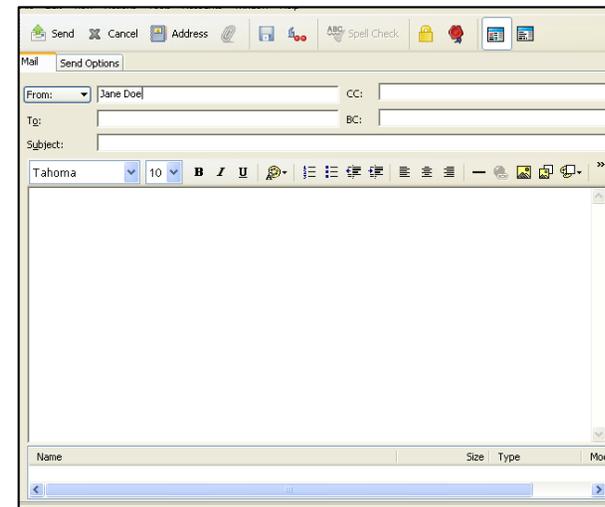
Project Status Report



Provides succinct information conveying timelines, progress, issues & next steps

Everyday Tool

Email / Memo



Communicate – Status Report

Project Management for Everyone

Office of Finance

Project Status Report May 2010

Project Management Life Cycle (PMLC)
Implementation of a cross-organizational project management process designed to provide common methodology, artifacts and terminology to projects involving EVP&T.

Project Owner: Adam Donaldson	Project Sponsor: Dave Lawlor – Finance, Dave Steinour – IT
Project Manager: Adam Donaldson	Stakeholders: All EVP&T, other GW depts. Interfacing with EVP&T on projects
Phase: Development	
Risk: Low	

Progress:

- Using *TouchNet* and *Roth 403(b)* as alpha testing for the process. Working with PMs from these projects to refine the PMLC process.
- Template Creation
 - Created Project Request Form / Idea Summary, Proposal, Charter, Business Requirements, Test Plan and Requirements Traceability Matrix.
 - Still have Project Definition Document, Implementation Plan, Communication Plan, Transition Document, Approval Document, Lessons Learned and Gate Review Board Summary to complete in May

Deadlines:

- 5/18 – Key stakeholder approval of process
- 8/11 – Beta Complete / Implementation start

Issues

- Having difficulty delegating work, as team members are reluctant to take on extra work due to their main responsibility. I need to find a way to develop the templates and finalize the process utilizing limited staff.

Next Steps

- 5/8 - receive approval from PMLC working group to move forward with beta.
- Mid-May - begin seeking an adequate beta for the process.

- Description
- Timeline
- Progress
- Deadlines
- Issues
- Next Steps

Manage

Project Management for Everyone

Executing

Monitoring

- ☑ Schedule & Project Workbook
- ☑ Action & Issues Register
- ☑ Status Report



Review

Closing

Project Management for Everyone

- Discuss what went right & wrong
- Hold final review

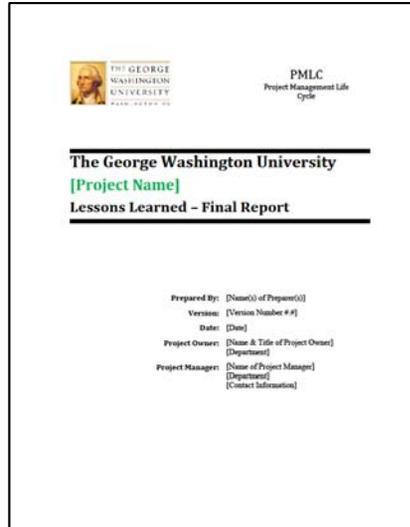


Review – Lessons Learned

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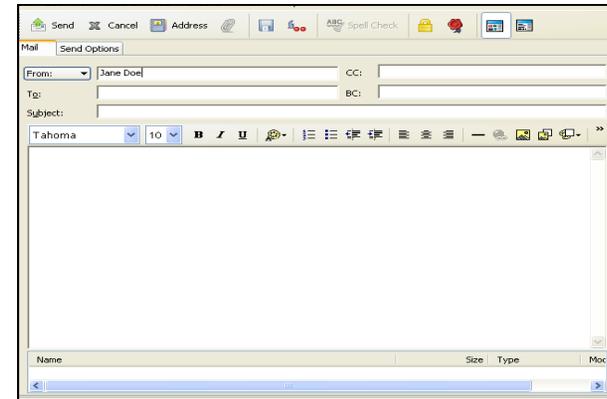
Lessons Learned Document



Formally documents lessons learned throughout the project by phase

Everyday Tool

Email / Memo



- Gather key participants to discuss lessons learned
- Capture important lessons which could help others engaged in similar activity

Review – Final Review

Project Management for Everyone

PM Tool

Project Approval Document

The George Washington University
[Project Name]
Project Transition Document

Prepared By: [Name(s) of Preparer(s)]
Version: [Version Number #]
Date: [Date]
Project Owner: [Name & Title of Project Owner]
[Department]
Project Manager: [Name of Project Manager]
[Department]
[Contact Information]

STATUS: In Progress
 Pending for Document Approval
 Approved
 Unapproved

Documents formal signature approval of the project

Everyday Tool

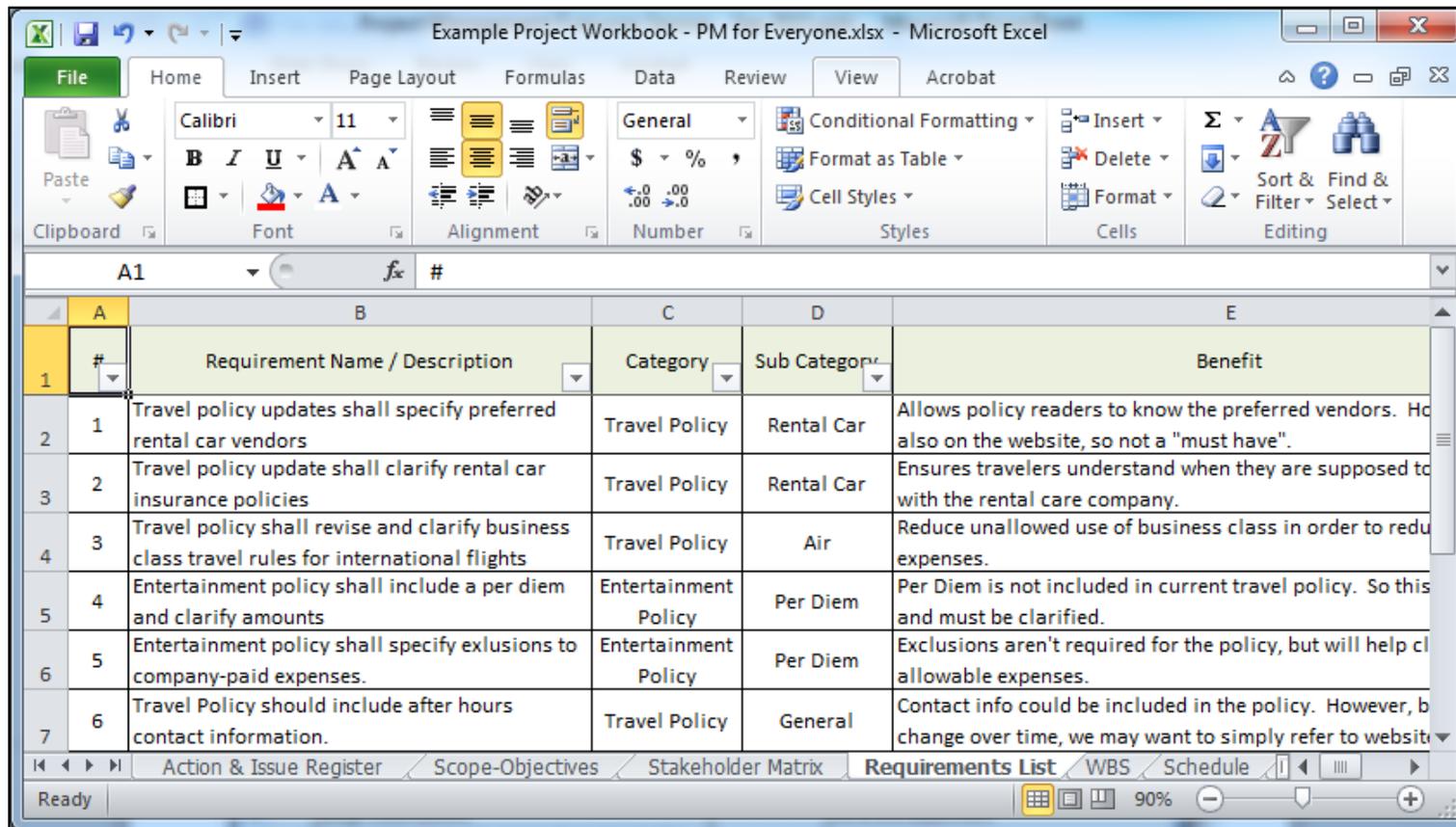
Review of Project Workbook

#	Requirement Name / Description	Category	Benefit
1	Department web page modifications shall conform to design standards set forth by External Relations	Design	Overall layout and color scheme will be consistent with GW standards and will continue to be easily updated
2	News and home page content updates will include information and occurrences which have happened within the previous 6 months	Content	Information contained on the front page needs to be timely and current in order to encourage users to continually return
3	Department managers will approve all content and design modifications	Governance	Ensures all web site updates have been agreed upon by the entire department
4	Organization chart and contact information shall be validated and made current as of the date of publishing to the web site.	Content	Provides the most current organization information possible to users of the web site
5	Time and date of the last update shall be displayed to the users	Content	Allows users to understand the currency of the information being presented



Review – Final Review

Project Management for Everyone



The screenshot shows a Microsoft Excel spreadsheet titled "Example Project Workbook - PM for Everyone.xlsx". The spreadsheet contains a table with the following columns: #, Requirement Name / Description, Category, Sub Category, and Benefit. The table lists seven requirements related to travel and entertainment policies.

#	Requirement Name / Description	Category	Sub Category	Benefit
1	Travel policy updates shall specify preferred rental car vendors	Travel Policy	Rental Car	Allows policy readers to know the preferred vendors. He also on the website, so not a "must have".
2	Travel policy update shall clarify rental car insurance policies	Travel Policy	Rental Car	Ensures travelers understand when they are supposed to with the rental care company.
3	Travel policy shall revise and clarify business class travel rules for international flights	Travel Policy	Air	Reduce unallowed use of business class in order to redu expenses.
4	Entertainment policy shall include a per diem and clarify amounts	Entertainment Policy	Per Diem	Per Diem is not included in current travel policy. So this and must be clarified.
5	Entertainment policy shall specify exlusions to company-paid expenses.	Entertainment Policy	Per Diem	Exclusions aren't required for the policy, but will help cl allowable expenses.
6	Travel Policy should include after hours contact information.	Travel Policy	General	Contact info could be included in the policy. However, b change over time, we may want to simply refer to websit

- Review objectives & requirements
- Review lessons learned
- Discuss plan to close open actions

Review

Closing

Project Management for Everyone

- ☑ Lessons Learned
- ☑ Project Workbook

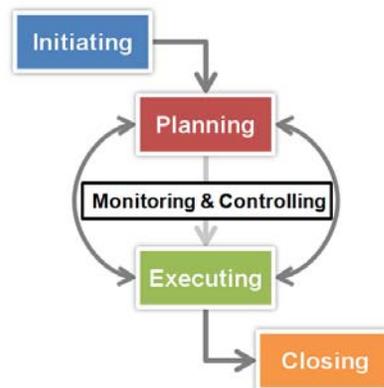
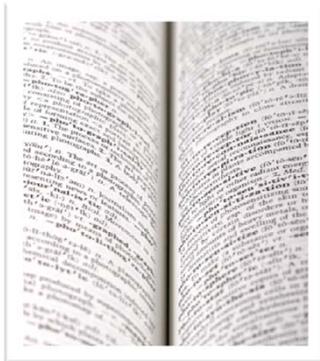


Summary

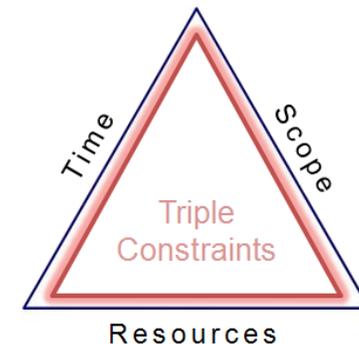
Project Management for Everyone

✓ Project Management Concepts

- Definition of a project
- Project Lifecycle
- Project Management Functions
- Triple Constraints



Scope Management
Time Management
Cost Management
Quality Management
HR Management
Communications Mgt
Risk Management
Procurement Mgt
Project Integration



Summary

Project Management for Everyone

Project tools for everyday tasks & projects

- Define

Initiating

- Clarification Memo
- Stakeholder Matrix
- Requirements List

- Plan

Planning

- Project Workbook
- Task Identification / WBS
- Schedule
- Communications Matrix

- Manage

Executing

Monitoring & Controlling

- Schedule / Proj Workbook
- Actions & Issues Register
- Status Report

- Review

Closing

- Lessons Learned Document
- Project Workbook

Questions

Project Management for Everyone



Thank You!!!

Project Management for Everyone

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Business Management & Analysis Group

Systems, Analytics & Insights Group

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