

THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Project Management *for Everyone*



Contact Information

Project Management for Everyone

Adam Donaldson, PMP

Business Management & Analysis Group

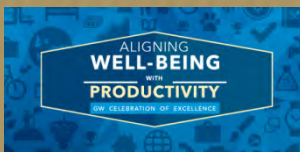
Phone: (202) 994-6867

Cell: (240) 472-2171

Email: adonald@gwu.edu

BUSINESS MANAGEMENT
& ANALYSIS GROUP (BMAG)

FINANCE DIVISION



THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Objectives

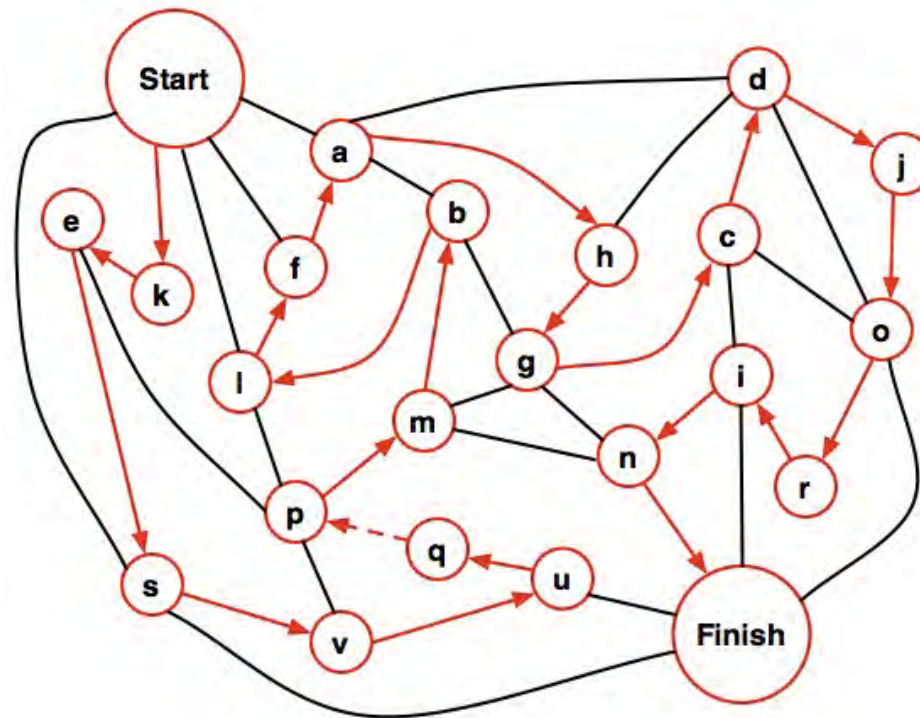
Project Management for Everyone

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



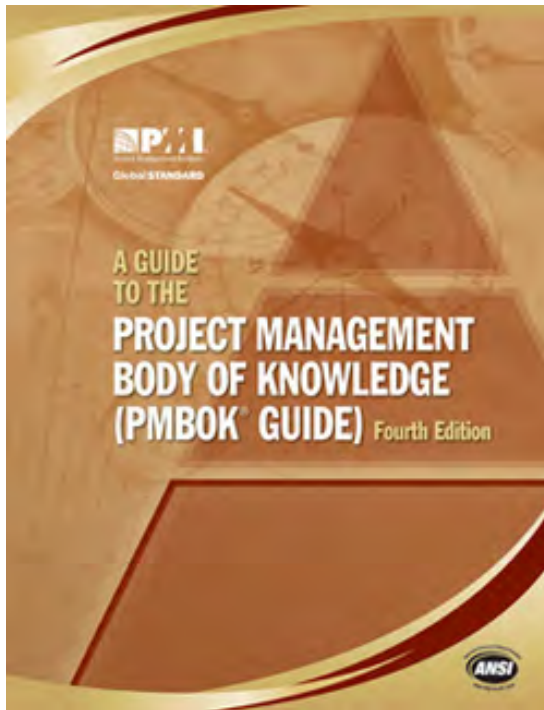
Project Management Principles

Project Management for Everyone



Project Management Institute

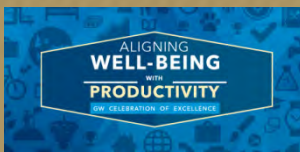
Project Management for Everyone



- ☐ 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



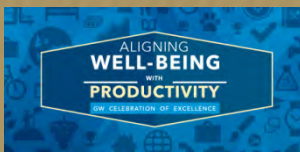
THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

GW MS in Project Management

Project Management for Everyone



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



THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC

Project Management for Everyone

Temporary / Not Ongoing

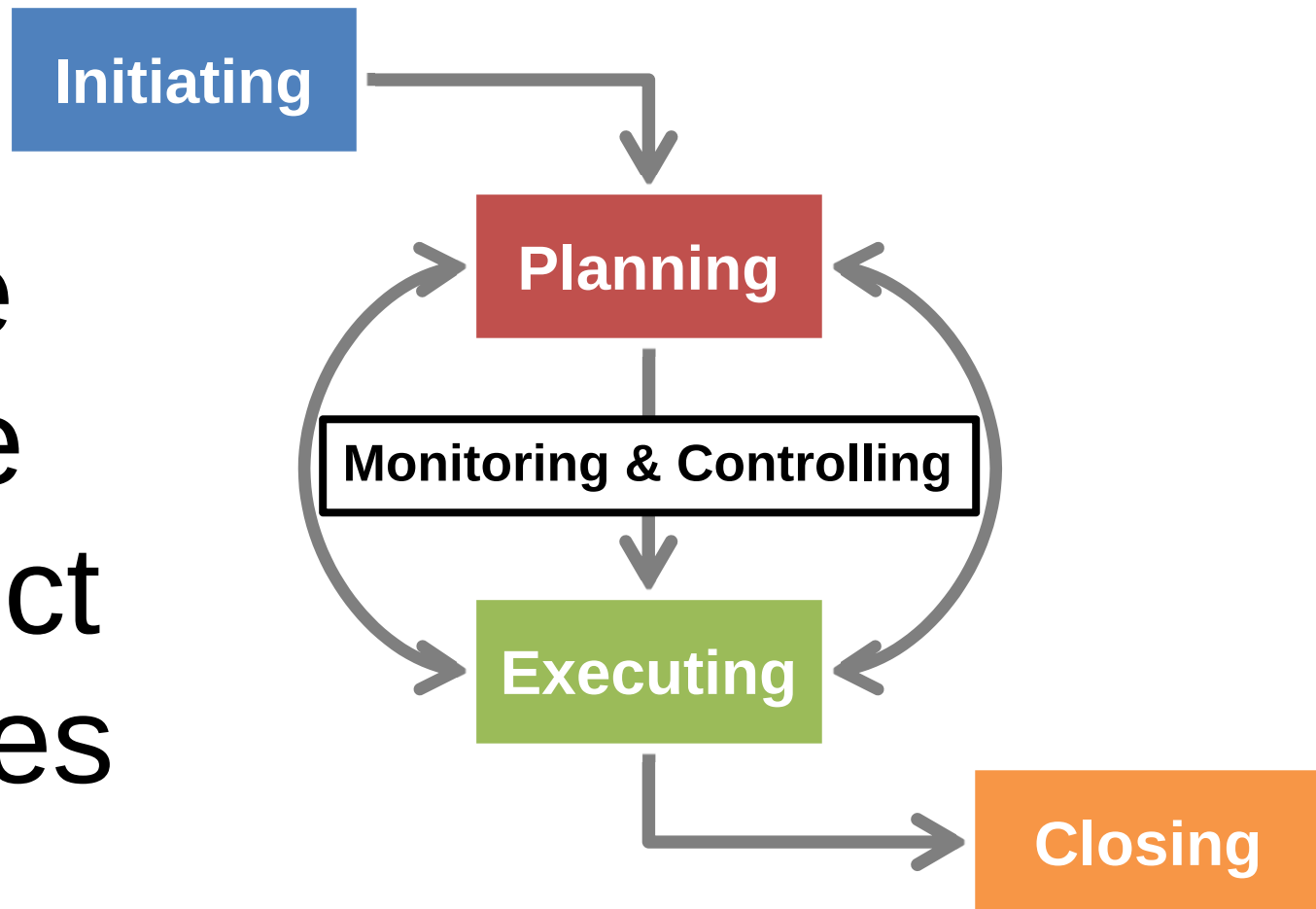
- Unique

- [illegible]

Project Life Cycle

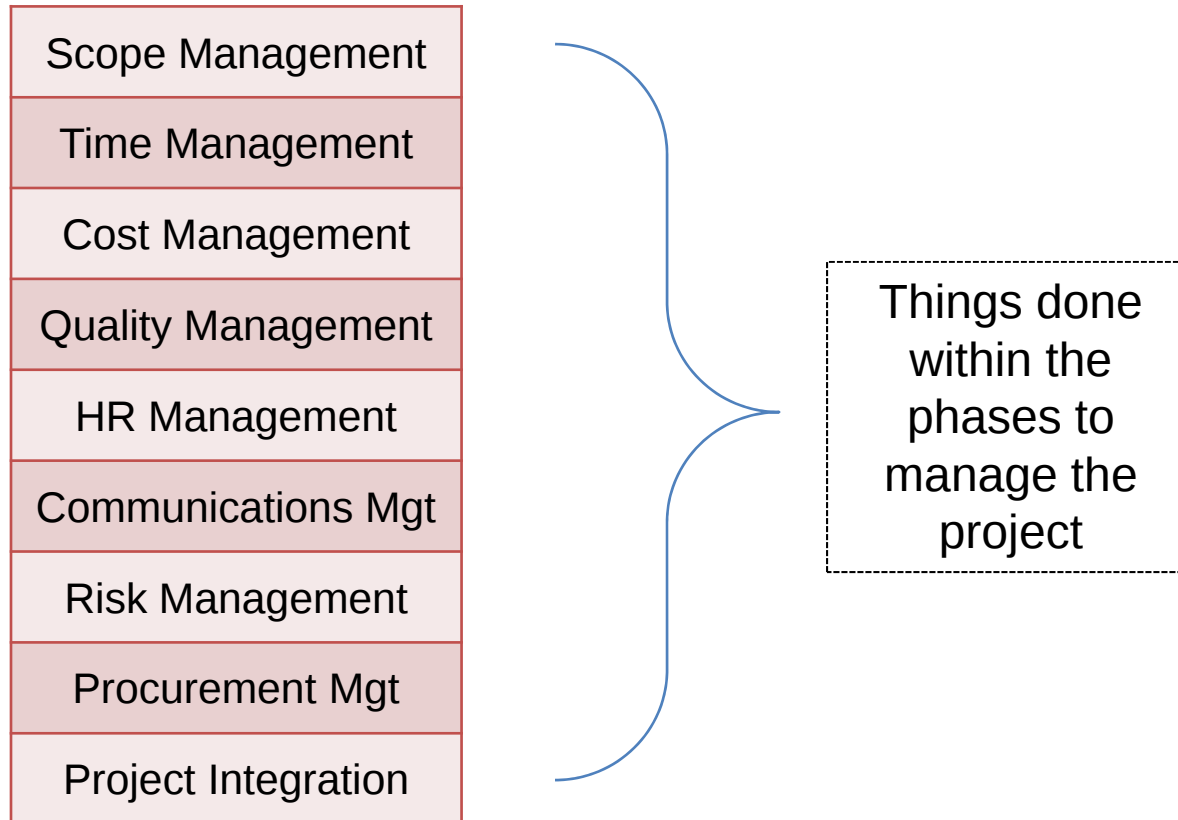
Project Management for Everyone

The Five Project Phases



Project Management Functions

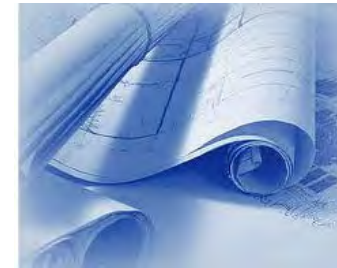
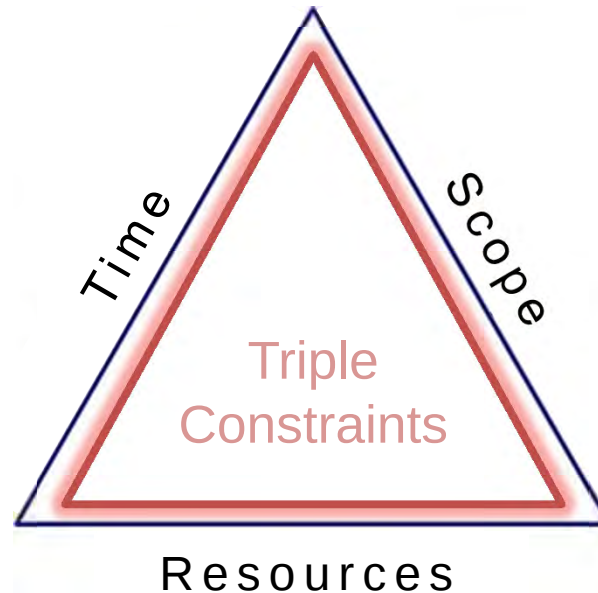
Project Management for Everyone



~ PMI refers to these as *Knowledge Areas* ~

Triple Constraints

Project Management for Everyone



~ Managing these is the primary responsibility of the PM ~

PM in Practical Terms

Project Management for Everyone

Initiating

Define

Clarify the request
and objectives

Planning

Plan

Develop the
specific approach

Executing

**Monitoring &
Controlling**

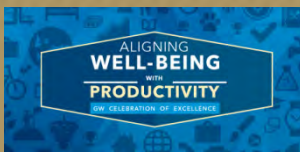
Manage

Task, action,
communication & resource management

Closing

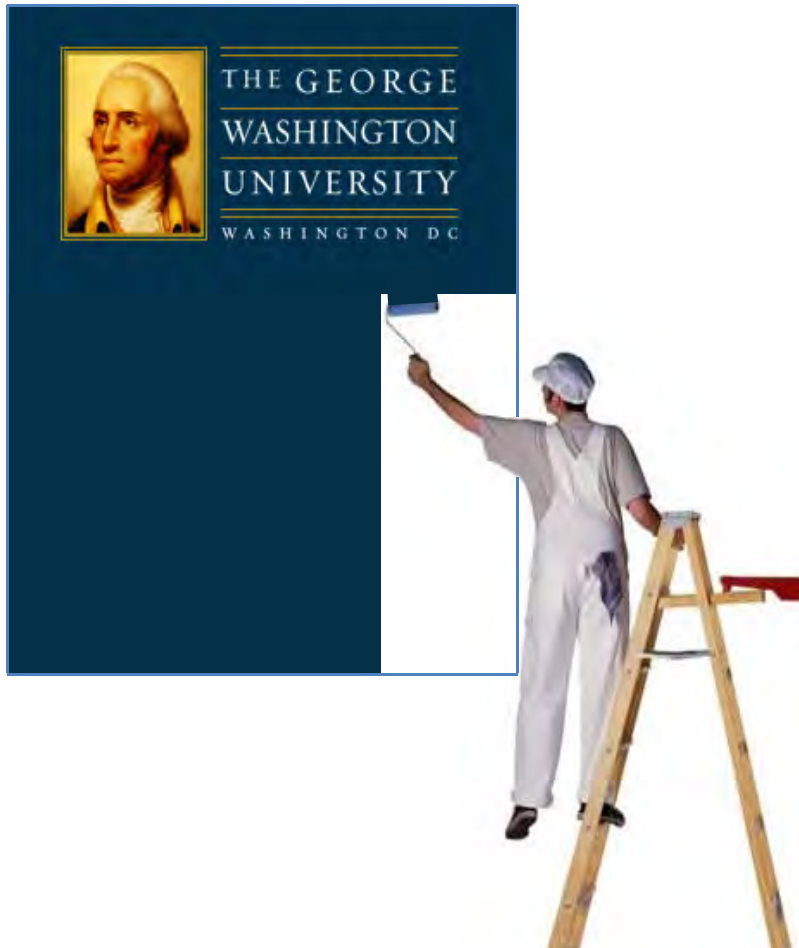
Review

Were expectations
met?



Day to Day Use of PM

Project Management for Everyone



What are some struggles often experienced in projects?

Define

Initiating

Project Management for Everyone

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

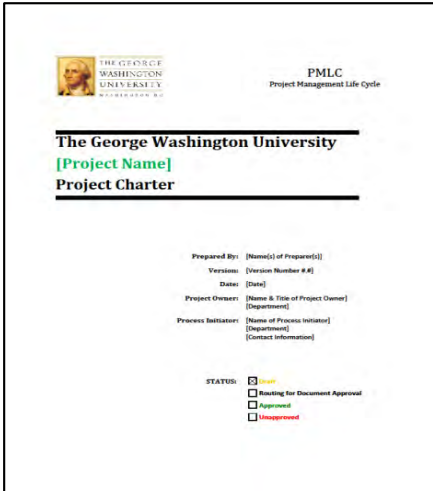


Define - Clarification

Project Management for Everyone

PM Tool

Project Charter

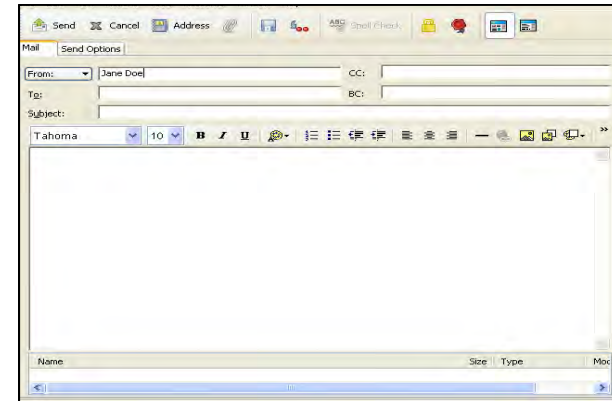


The form is titled "The George Washington University [Project Name] Project Charter". It includes fields for "Prepared By:", "Version:", "Status:", "Project Owner:", and "Process Initiator:". At the bottom, there is a "STATUS:" section with checkboxes for "Draft", "Pending for Document Approval", "Approved", and "Unapproved".

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

Everyday Tool

Email / Memo



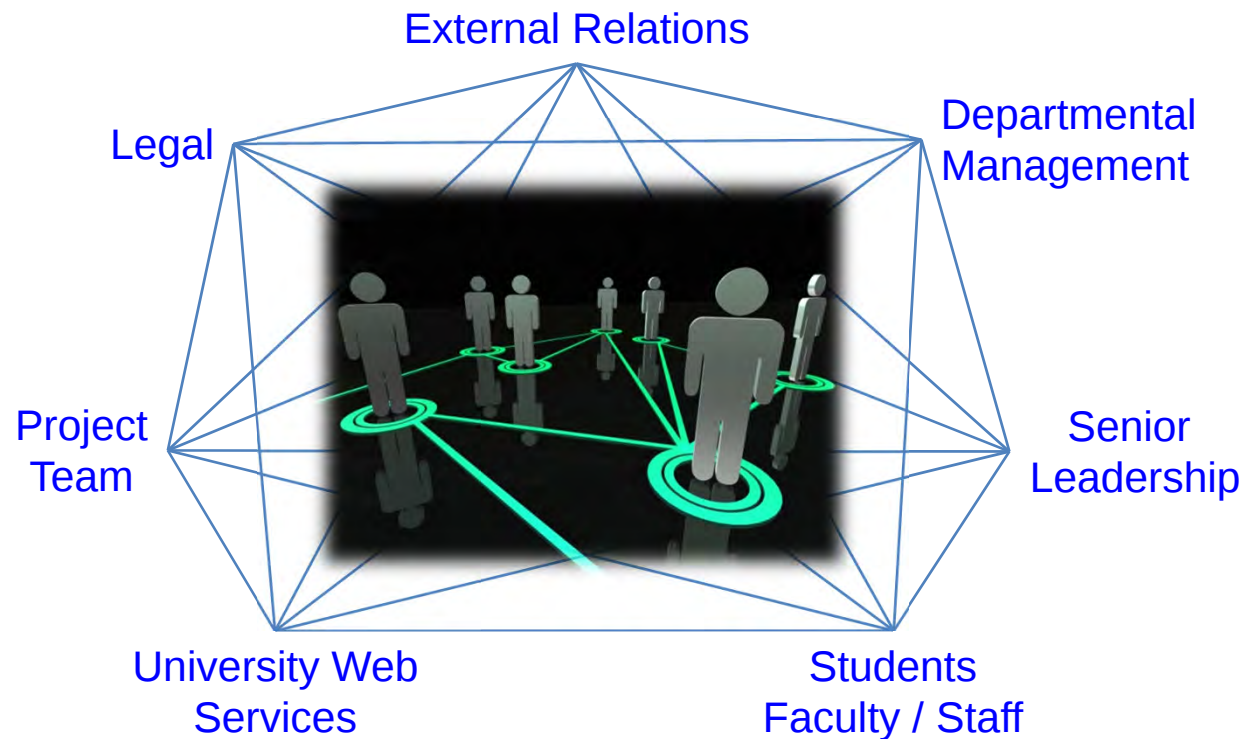
The screenshot shows an email client window with fields for "From:", "To:", "Subject:", "CC:", and "BC:". The "From:" field is filled with "Jane Doe". The "Subject:" field is filled with "Tahoma". The email body is empty.

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

Define - Identify Stakeholders

Project Management for Everyone

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

Project Management for Everyone

PM Tool

Everyday Tool

Stakeholder Matrix

Name	Title	Department	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
Dave Green	Executive Director	Business Management & Analysis Group	Project Owner	202-994-4151 dbgreen@gwu.edu	M	M
John Doe	Director	Division of IT	Web Development	202-555-1212 john_doe@gwu.edu	H	M
Jane Doe	Manager	External Relations	Content Validation	703-555-1212 jane_doe@gwu.edu	L	H

- Identify and track key stakeholders
- Determine Impact & Influence to gauge how to manage
- Ensure thoroughness of communications planning

Define - Requirements

Project Management for Everyone

PM Tool

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 Proposer(s)]
Version: [Version Number X.Y]
Date: [Date]
Project Owner: [Name & Title of Project Owner]
[Department]
Project Manager: [Name of Project Manager]
[Department]
[Contact Information]

STATUS: ☒ Draft
☐ Pending for Document Approval
☐ Approved
☐ Rejected

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

Everyday Tool

Requirements List

#	Requirement Name / Description	Category
1	Department web page modifications shall conform to design standards set forth by External Relations	Design
2	News and home page content updates will include information and occurrences which have happened within the previous 6 months	Content
3	Department managers will approve all content and design modifications	Governance
4	Organization chart and contact information shall be validated and made current as of the date of publishing to the web site.	Content
5	Time and date of the last update shall be displayed to the users	Content

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

Define

Initiating

Project Management for Everyone

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



Plan

Planning

Project Management for Everyone

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



Plan – Project Management Plan

Project Management for Everyone

PM Tool

Project Management Plan

The George Washington University
[Project Name]
Project Definition Document

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

STATUS: ☒ Approved
☐ Pending for Document Approval
☐ Rejected
☐ Incomplete

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

Everyday Tool

Project Workbook

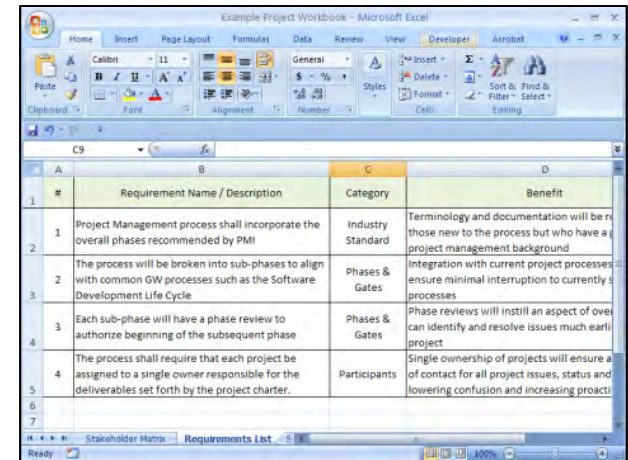
#	Requirement Name / Description	Category	Benefit
1	Project Management process shall incorporate the overall phases recommended by PMI	Industry Standard	Terminology and documentation will be re those new to the process but who have a g project management background
2	The process will be broken into sub-phases 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

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



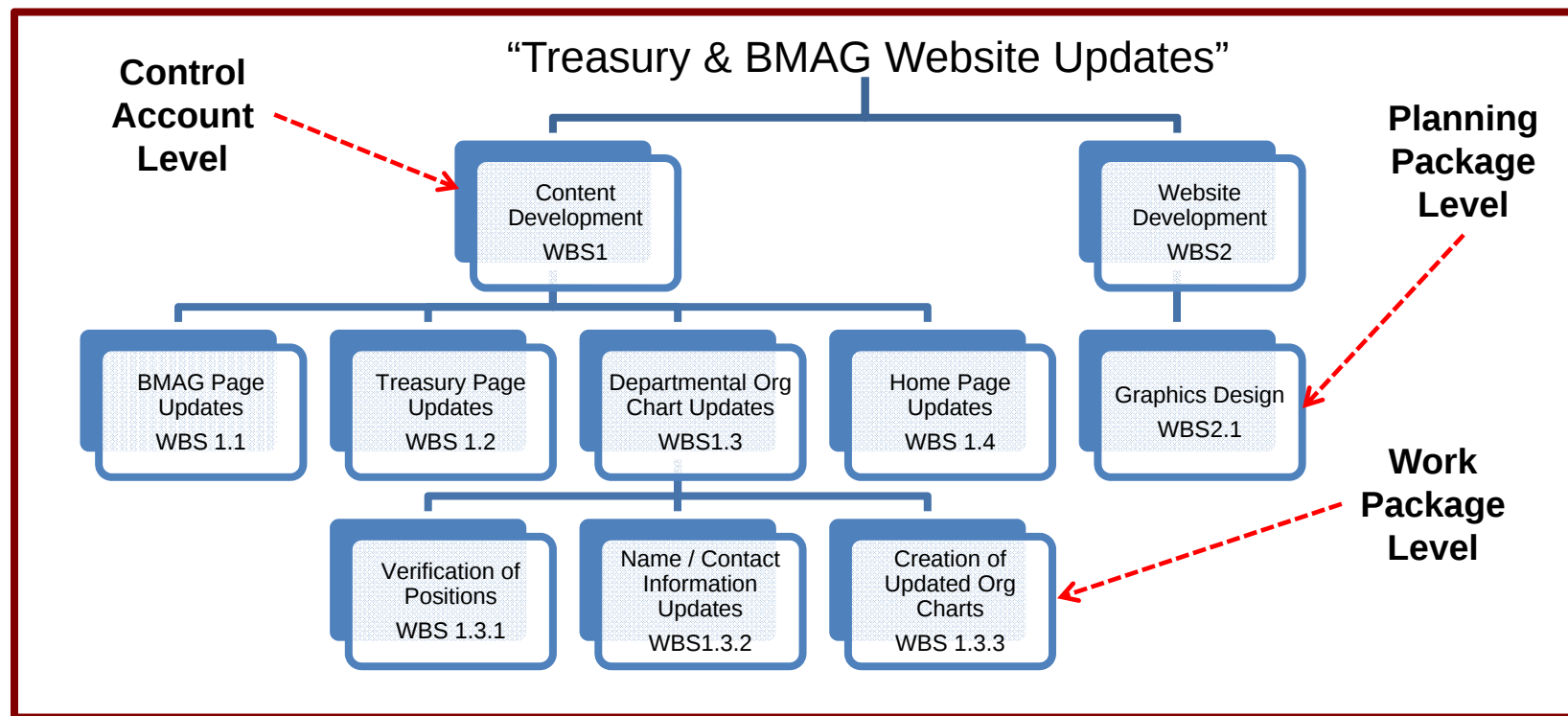
#	Requirement Name / Description	Category	Benefit
1	Project Management process shall incorporate the overall phases recommended by PMI	Industry Standard	Terminology and documentation will be new to the process but who have a project management background
2	The process will be broken into sub-phases to align with common GW processes such as the Software Development Life Cycle	Phases & Gates	Integration with current project processes ensure minimal interruption to currently 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 oversight can identify and resolve issues much earlier 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

Plan – Work Breakdown Structure

Project Management for Everyone

PM Tool

Everyday Tool



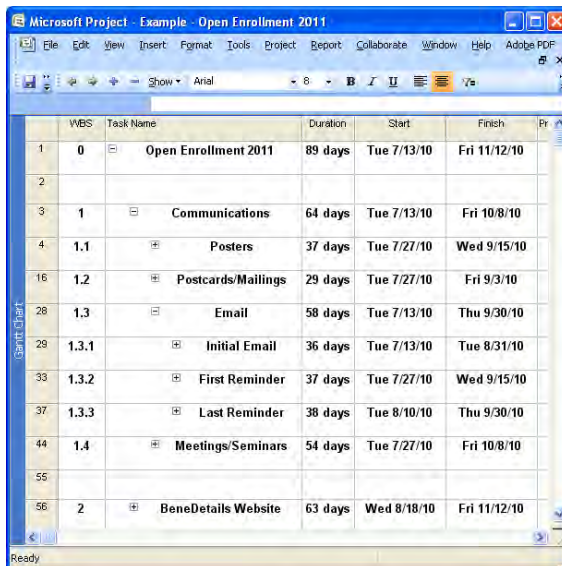
- Breaks deliverables into manageable work packages
- Ensures we don't forget or omit important tasks

Plan – Schedule

Project Management for Everyone

PM Tool

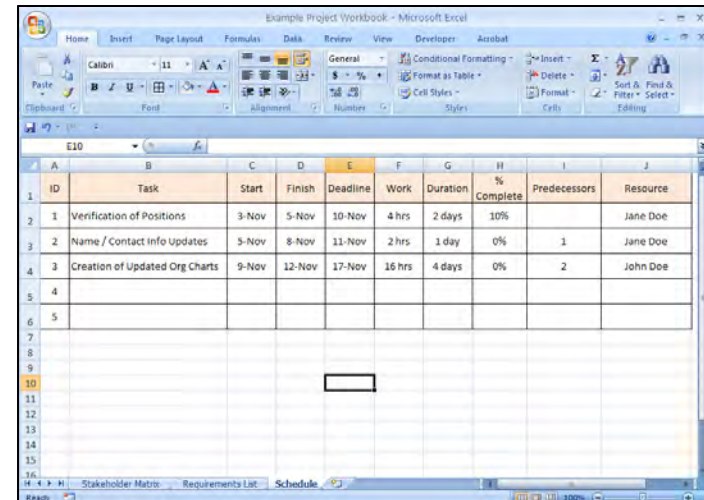
Formal Project Schedule



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	5-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
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									

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
1	Verification of Positions	3-Nov	5-Nov	-	4 hrs	2 days	10%		Jane Doe
2	Name / Contact Info Updates	5-Nov	8-Nov	-	2 hrs	1 day	0%	1	Jane Doe
3	Creation of Updated Org Charts	9-Nov	12-Nov	-	16 hrs	4 days	0%	2	John Doe
4	Receive approval from dept Director on Org Chart updates	15-Nov	16-Nov	-	2 hrs	2 days	0%	3	Adam Donaldson
5	Upload of Org Charts onto Web	17-Nov	17-Nov	18-Nov	2 hrs	0.25 days	0%	4	Jane Doe

- 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

Project Management for Everyone

PM Tool

Communications Plan

The George Washington University
[Project Name]
Project Communication Plan

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

Documents the detailed plan
for communicating with all
stakeholders

Everyday Tool

Communications Matrix

#	Communication	Medium	Delivery Date	Frequency	Audience	Reviewer	Owner	Status
1	Notification of department heads of 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	Notification of department heads of 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

- 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
- ☑ Work Breakdown Structure (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	Est Complete Date	Status	Close Date
32	Med	Check with Dave on the direction we want to go for language on the home page	Adam	10/20/11	10/26/11	Open	
33	Med	Verify that we can do rotating pictures and bios on the "about us" page	Bill	10/15/11	10/29/11	Open	
34	High	Setup meeting with SAVP to receive approval on overall design.	Dave	10/15/11	11/5/11	Open	
35	Low	Gather bios and pictures from each team member for "about us" page	Adam	10/20/11	11/15/11	Open	
36	Med	Verify that organization charts can be completed by the required deadline.	Adam	10/20/11	11/2/11	Open	
37	Med	Setup meeting with External Relations to review the overall design	Dave	10/20/11	11/19/11	Open	

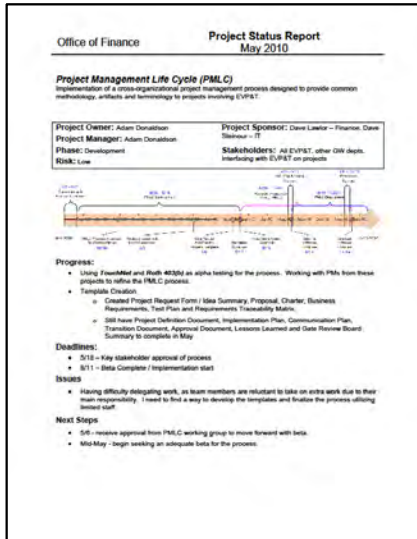
- Log and track all actions and issues – ensures accountability
- Tasks are scheduled – Action Items “pop up”

Communicate – Status Report

Project Management for Everyone

PM Tool

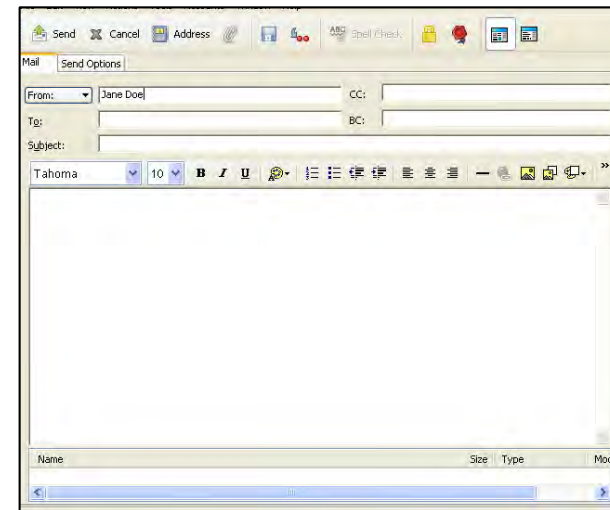
Project Status Report



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 Manager: Adam Donaldson

Phase: Development

Risk: Low

Project Sponsor: Dave Lawlor – Finance, Dave Steinour – IT

Stakeholders: All EVP&T, other GW depts. Interfacing with EVP&T on projects

The timeline illustrates the PMLC process from December 2009 to December 2010. Key milestones include the approval of the PMLC process by the working group in December 2009, the completion of the PMLC process in January 2010, and the approval of the PMLC process by the cross-team and executive in February 2010. The process continues through the rest of the year, with various milestones and approvals.

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

- 5/6 - 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

Project Management for Everyone

PM Tool

Lessons Learned Document

The screenshot shows a document template for 'The George Washington University PMLC Project Management Life Cycle'. The title is 'The George Washington University [Project Name] Lessons Learned - Final Report'. Below the title, there are fields for 'Prepared By: [Name(s) of Preparer(s)]', 'Version: [Version Number #]', 'Date: [Date]', 'Project Owner: [Name & Title of Project Owner] (Department)', and 'Project Manager: [Name of Project Manager] (Department) (Contact Information)'.

Formally documents lessons learned throughout the project by phase

Everyday Tool

Email / Memo

The screenshot shows an email client interface with a 'Send' button, 'From' field (Jane Doe), 'To' field, 'Subject' field, and a large text area for the email body. The font is set to Tahoma, size 10.

- 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 #X]
Date: [Date]
Project Owner: [Name & Title of Project Owner]
[Department]
Project Manager: [Name of Project Manager]
[Department]
[Contact Information]

STATUS: ☒ Draft
☐ Pending for Document Approval
☐ Approved
☐ Unapproved

Documents formal signature
approval of the project

Everyday Tool

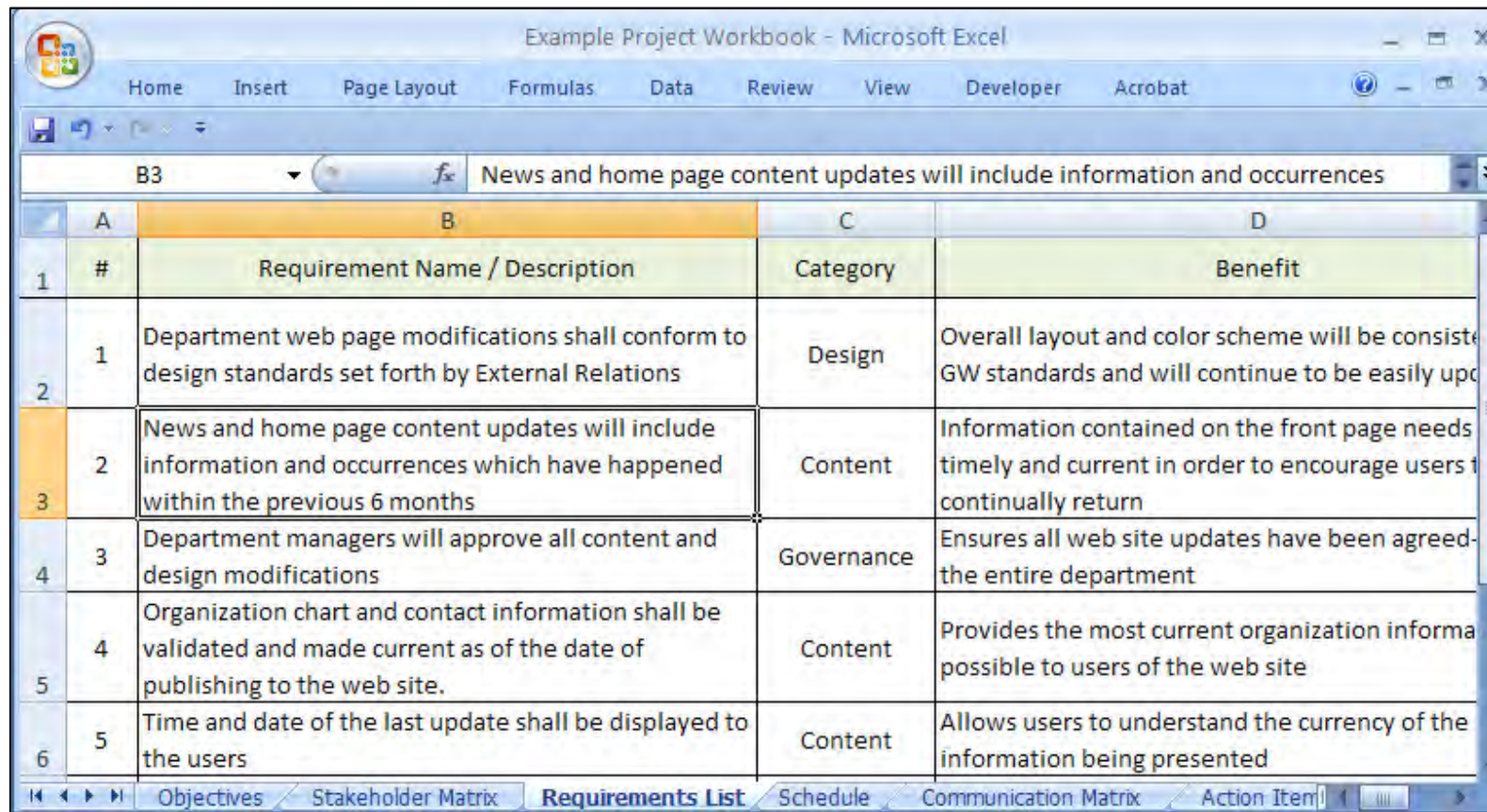
Review of Project Workbook

	A	B	C	D
1	#	Requirement Name / Description	Category	Benefit
2	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
3	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
4	3	Department managers will approve all content and design modifications	Governance	Ensures all web site updates have been agreed-upon by the entire department
5	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
6	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 window titled "Example Project Workbook - Microsoft Excel". The ribbon includes tabs for Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, and Acrobat. The active cell is B3, containing the text "News and home page content updates will include information and occurrences". Below the ribbon is a table with the following structure:

	A	B	C	D
1	#	Requirement Name / Description	Category	Benefit
2	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
3	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
4	3	Department managers will approve all content and design modifications	Governance	Ensures all web site updates have been agreed upon by the entire department
5	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
6	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

At the bottom of the window, the sheet tabs are: Objectives, Stakeholder Matrix, Requirements List (selected), Schedule, Communication Matrix, and Action Items.

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

Review

Closing

Project Management for Everyone

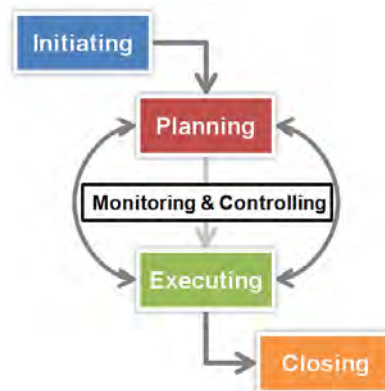
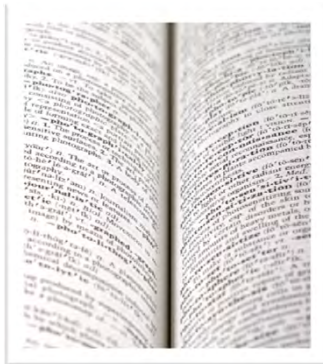
- ☑ Lessons Learned
- ☑ Project Workbook



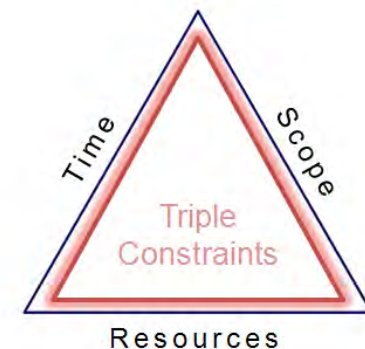
Summary

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
- Work Breakdown Structure
- Schedule
- Communications Matrix

- Manage

Executing
Monitoring & Controlling

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

- Review

Closing

- Lessons Learned
- Project Workbook

Questions

Project Management for Everyone



Thank You!!!

Project Management for Everyone

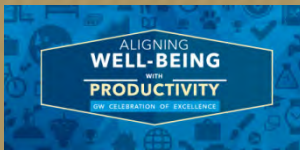
Adam Donaldson, PMP

Business Management & Analysis Group

Phone: (202) 994-6867

Cell: (240) 472-2171

Email: adonald@gwu.edu



THE GEORGE
WASHINGTON
UNIVERSITY
WASHINGTON, DC