PROJECT MANAGEMENT TECHNIQUES FOR NON-PROJECT MANAGERS
Agenda

- Introduction
- Project Management Overview
- Project Management Concepts
- Project Management Techniques
- BC Technology
- Summary
- Q&A
Introduction

- Speakers

- Session 1 Recap (4/6)
  - Value and Application of Project Management @ Boston College
Overview – Project

- **What is project management?**
  - Application of knowledge, skills, tools and techniques to project activities to meet project requirements

- **What is a project?**
  - A “temporary endeavor undertaken to create a unique product, service or results”
    - Definite beginning & end
    - Team is formed & reassigned at completion
  - Vs. operations – ongoing, repetitive
Overview – Project Manager

- What is a project manager?
  - The person assigned to achieve the project objectives

.. In most cases – YOU

- A role not necessarily a job
Project Management Profession

Project Management Institute (PMI®)

- World’s leading not-for-profit association for the project management profession (40+ yrs)
- Membership / local chapters
  - Mass Bay & Central Mass (MA)
  - Ocean State (RI), Southern New England (CT)
  - New Hampshire & Greater Monadnock (NH)
  - Maine Chapter (ME), Champlain Valley (VT)
- Credentials / Certifications
  - Program Management Professional (PgMP®)
  - Project Management Professional (PMP®)
  - Certified Associate in Project Management (CAPM®)
- www.pmi.org
Overview – Project Challenges

- Why are projects challenging?
  - Unique, something new, no blueprint
  - Sometimes difficult to define – what is it, when does it end
  - Working with people
  - Too much to do, too little time
  - As soon as you start, something changes

“If you don’t know where you’re going, then any road will get you there” – Alice in Wonderland
Overview – PM Importance

- Why is project management important?
- Why do we need project managers or people who can manage projects?

- to address the previous challenges
- to get the required work done as quickly and efficiently as possible

The value from a project is achieved at the END
Concepts – Management

Project Management vs. General Management
Concepts – Project Lifecycle

Project Management Processes

1. Initiating
2. Planning
3. Executing
4. Controlling (and monitoring)
5. Closing
Where is time typically spent?

1. Initiating 10%
2. Planning 85%
3. Executing 5%
4. Controlling (and monitoring) 10%
5. Closing 5%
Concepts – Project Processes

How time should be spent!

1. Initiating 10% 20%
2. Planning 85% 70%
3. Executing 5% 10%
4. Controlling (and monitoring) 10% 20%
5. Closing
Change in one side MUST affect another side (or both)
Techniques – Overview

Definition: “a body of technical methods”, “a method of accomplishing a desired aim”

- One size does NOT fit all – tailor to project size / complexity
- Just enough PM – not a burden or impediment to achieving your end goal (project’s objective)
Concepts – Project Lifecycle

Project Management Processes

1. Initiating
2. Planning
3. Executing
4. Controlling (and monitoring)
5. Closing
Techniques – Project Charter

Start the project – document ‘hallway’ conversation

- Project Charter / Project Definition / Business Case
  - What are you doing?
  - What are you NOT doing?
  - Why are you doing this?
  - How will you know when you’re done!

- Project Kickoff
Initiation – Project Charter

- Overview
- Goal
- Objectives
- Benefits
- Success Criteria
- Approach
- Assumptions
- Constraints
- Scope (in / out)
- Stakeholders
- Risks
- Milestones
- Communications
- Approval
Project Charter – Examples

Table of Contents

1. EXECUTIVE SUMMARY
2. DOCUMENT PURPOSE
3. HIGH LEVEL BUSINESS CASE
4. PROJECT SCOPE
5. PROJECT ASSUMPTIONS
6. PROJECT PLANNING
   6.1 WORK BREAKDOWN STRUCTURE
7. PROJECT DELIVERY TIMELINES
8. ORGANIZATION STRUCTURE
   8.1 PROJECT TEAM ROLES & RESPONSIBILITIES
   8.2 Brown College Core Resources
   8.3 Brown College additional Resources
9. PROJECT MANAGEMENT PROCEDURES
   9.1 Team Meetings
   9.2 TRACKING
9.3 CHANGE REQUESTS
10. INITIAL PROJECT PLAN
10. PROJECT CHARTER APPROVAL
Concepts – Project Lifecycle

Project Management Processes

1. Initiating
2. **Planning**
3. Executing
4. Controlling (and monitoring)
5. Closing
Techniques – Project Planning

Expand Project Charter to greater detail

- How are you going to complete your project?
  - What steps or actions are required
  - What resources are required
  - What is the timeline
  - What is the cost
  - What might derail you (risks)
Planning – WBS

What steps or actions are required?

- Work Breakdown Structure (WBS)
  - Addresses total scope of project
  - Divides work into manageable components
  - Scope decomposition – start at the end
  - Hierarchical depiction

Defines High-level Tasks
WBS – Example
Planning – Resource Plan

What resources are required?

- Resource Plan (project team)
  - Roles and skill set
  - Timeframe – start / end date
  - Demand – full-time vs. part-time (fte)
  - Location – local / co-located vs. remote / virtual

Defines what skills are needed when - and ultimately who
## Resource Plan – Example

<table>
<thead>
<tr>
<th>Name</th>
<th>Project Role</th>
<th>Project Responsibilities</th>
<th>% of Project time</th>
<th>Project Backup</th>
<th>Start Date on Project</th>
<th>End Date on Project</th>
<th>Other Roles</th>
<th>% of Other time</th>
<th>Total</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

### Sub-team1

- Project
- Operations / Support

### Sub-team2

- Project
- Operations / Support
- Projects
- Operations / Support
- Training / mentoring
Planning – Project Schedule

What is the timeline?

- Project Schedule – MS Excel (.xls) or Project (.mpp)
  - Task
  - Resource
  - Dependencies
  - Start Date & End Date (duration)

Resolves constraints based on WBS, activity sequence / duration, and resource plan; defines critical path
### Project Schedule – xls Example

<table>
<thead>
<tr>
<th>Task</th>
<th>Planned start date</th>
<th>Planned finish date</th>
<th>Resource requirements</th>
<th>Resource managers consulted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research/Analysis/Database and System Design and Development</td>
<td>7/1/2006</td>
<td>8/31/2006</td>
<td>2 Enterprise systems developers for 2 months each; 1 DBA for .5 month</td>
<td>Manager 1, Manager 2</td>
</tr>
<tr>
<td>Installation of new hardware and software environments</td>
<td>9/1/2006</td>
<td>9/22/2006</td>
<td>1 System admin. for .5 month; 1 DBA for .75 month</td>
<td>Manager 3, Manager 1</td>
</tr>
<tr>
<td>Common components--prototype development and unit testing</td>
<td>9/23/2006</td>
<td>11/7/2006</td>
<td>3 Developers for 1.5 months each</td>
<td>Manager 1</td>
</tr>
<tr>
<td>OSP components--prototype development and unit testing</td>
<td>11/8/2006</td>
<td>2/22/2007</td>
<td>3 Developers for 3 months each</td>
<td>Manager 1</td>
</tr>
<tr>
<td>ORC components--prototype development and unit testing</td>
<td>2/23/2007</td>
<td>7/7/2007</td>
<td>3 Developers for 4.5 months each</td>
<td>Manager 1</td>
</tr>
<tr>
<td>Implementation of OSP validations and enhancements not directly covered in migration</td>
<td>7/8/2007</td>
<td>8/22/2007</td>
<td>3 Developers for 1.5 months each at 50% of their time</td>
<td>Manager 1</td>
</tr>
<tr>
<td>Implementation of ORC validations and enhancements not directly covered in migration</td>
<td>8/23/2007</td>
<td>10/7/2007</td>
<td>3 Developers for 1.5 months each at 80% of their time</td>
<td>Manager 1</td>
</tr>
<tr>
<td>Integration of new system with existing systems</td>
<td>10/8/2007</td>
<td>TBD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Other budgetary considerations

- **Hardware**: $50,000 for server to house new systems
- **Software**: No software costs; all software to be developed in-house
## Project Schedule – Gantt example

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Dur</th>
<th>%</th>
<th>Start</th>
<th>Finish</th>
<th>Predecessors</th>
<th>Resource Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Clement's Relocation Project</td>
<td>811</td>
<td>95</td>
<td>1/1/06</td>
<td>2/2/07</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITS DataCenter Requirements / Recommendations</td>
<td>543</td>
<td>100</td>
<td>3/1/06</td>
<td>4/1/06</td>
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<td></td>
</tr>
<tr>
<td>Capital Projects / Design &amp; Engineering (EVP)</td>
<td>380</td>
<td>100</td>
<td>4/19/06</td>
<td>9/30/06</td>
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<tr>
<td>Capital Projects / Construction (LKCO)</td>
<td>241</td>
<td>100</td>
<td>10/1/06</td>
<td>9/12/06</td>
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<tr>
<td>Project Planning</td>
<td>984</td>
<td>100</td>
<td>3/1/06</td>
<td>10/22/06</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Technology Serv (ITS) - Infrastructure &amp; DataCenter</td>
<td>633</td>
<td>92</td>
<td>8/30/06</td>
<td>2/2/07</td>
<td></td>
<td></td>
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<tr>
<td>Datacenter Relocation Planning</td>
<td>563</td>
<td>100</td>
<td>8/30/06</td>
<td>10/21/06</td>
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<td></td>
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<tr>
<td>Systems Prep - O'Neill 5th</td>
<td>298</td>
<td>100</td>
<td>8/2/06</td>
<td>8/24/06</td>
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<tr>
<td>Networking Prep - O'Neill 5th</td>
<td>414</td>
<td>100</td>
<td>1/1/06</td>
<td>8/3/06</td>
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<td></td>
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<tr>
<td>Datacenter Relocation Prep - St. Clement's</td>
<td>452</td>
<td>77</td>
<td>3/5/06</td>
<td>11/24/06</td>
<td></td>
<td></td>
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<tr>
<td>Datacenter Relocation Moves</td>
<td>62</td>
<td>100</td>
<td>8/18/06</td>
<td>10/25/06</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1a) Perform Unit Testing</td>
<td>10</td>
<td>100</td>
<td>8/18/06</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Verify cabling for unit test move</td>
<td>3</td>
<td>100</td>
<td>8/3/06</td>
<td></td>
<td></td>
<td>Carl S, Tom B</td>
</tr>
<tr>
<td>Continue network performance testing</td>
<td>7</td>
<td>100</td>
<td>8/22/06</td>
<td></td>
<td></td>
<td>Tom B</td>
</tr>
<tr>
<td>Continue SRDF performance testing</td>
<td>5</td>
<td>100</td>
<td>8/29/06</td>
<td></td>
<td></td>
<td>Jay B</td>
</tr>
<tr>
<td>Move Linux &amp; test (dolphin)</td>
<td>7</td>
<td>100</td>
<td>8/10/06</td>
<td></td>
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<td>Dave R</td>
</tr>
<tr>
<td>Move AD/VMware &amp; test (McDingo) - need VM Mux</td>
<td>3.5</td>
<td>100</td>
<td>8/13/06</td>
<td></td>
<td></td>
<td>Dave R, Leo M</td>
</tr>
<tr>
<td>Move Windows &amp; test (Abbott)</td>
<td>5.5</td>
<td>100</td>
<td>8/15/06</td>
<td></td>
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<td>Allison C</td>
</tr>
<tr>
<td>1b) Move 1/2 cluster: ADDNS/SDHC/LDAP</td>
<td>10</td>
<td>100</td>
<td>8/15/06</td>
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<tr>
<td>1c) Pilot Test - 5 racks/40 sys</td>
<td>8</td>
<td>100</td>
<td>8/15/06</td>
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<tr>
<td>2) Columbus Day Weekend Move - 20 racks/40 sys ++</td>
<td>12</td>
<td>100</td>
<td>9/26/06</td>
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</tr>
<tr>
<td>3a) Oct 20-22 Move (remaining servers) - 5 racks/25 sy:</td>
<td>10</td>
<td>100</td>
<td>10/14/06</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Datacenter Relocation Post-Oct Move Events</td>
<td>243</td>
<td>35</td>
<td>3/17/06</td>
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</tr>
<tr>
<td>Information Technology Serv (ITS) - Staff (N Wing, fls 1-4)</td>
<td>764</td>
<td>100</td>
<td>11/14/06</td>
<td></td>
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<tr>
<td>ITS Space Planning / Program</td>
<td>523</td>
<td>100</td>
<td>11/14/06</td>
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<tr>
<td>Staff Relocation</td>
<td>174</td>
<td>100</td>
<td>3/23/06</td>
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<tr>
<td>Campus Co-location - subset of ITS remaining on Main campus</td>
<td>349</td>
<td>89</td>
<td>7/4/06</td>
<td>10/27/06</td>
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</tbody>
</table>
Planning – Project Budget

What is the cost?

- Project Budget
  - Hard dollars ($)  
    - Hardware, software, vendor / consulting services, travel  
    - Funding: capital vs. departmental  
    - Don’t forget operating costs  
  - Soft dollars  
    - BC resources

Based on project schedule
What might derail you (risks)?

- **Project Risk**
  - What could happen?
  - What is the likelihood of it happening?
  - What is the impact if it did happen?
  - For high priority items, define risk strategy / approach
    - Accept, mitigation, contingency

Identify risk, action strategy & trigger (if applicable)
## Project Risk – Example

<table>
<thead>
<tr>
<th>Risk Plan - Project Name</th>
<th>Date</th>
<th>Risk #</th>
<th>Risk Class</th>
<th>Date Raised</th>
<th>Risk Description</th>
<th>Risk Probability</th>
<th>Risk Impact</th>
<th>Risk Rating</th>
<th>Risk Response Strategy</th>
<th>Risk Response Plan</th>
<th>Risk Owner</th>
<th>Review Date</th>
<th>Current Status</th>
<th>Previous Review</th>
<th>Previous Status</th>
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<tr>
<td><strong>Open / Current Risks</strong></td>
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<tr>
<td><strong>Closed / Passed Risks</strong></td>
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</table>
Concepts – Project Lifecycle

Project Management Processes

1. Initiating
2. Planning
3. Executing
4. Controlling
5. Closing
Techniques – Execution / Control

Implement the Project Schedule & control the project

- Manage reality
  - Scope changes, scope creep, scope misunderstandings
  - Resource changes, resource unavailability, resource skills
  - Estimates are incorrect, tasks are missing
  - Risk events occur

“No battle plan survives contact with the enemy”
– Colin Powell
Project Execution / Control

- Tracking
  - Progress against Project Schedule
  - Risks

- Change Control
  - Manage change process

- Communication
  - Update team and stakeholders
Project Execution – Tracking

Implement the Project Schedule

- Project Tracking
  - Schedule – % complete
  - Risks – monitor triggers, address new risks
  - Issues / Actions Log – new or missed items, items preventing task completion

Make it happen
# Project Issues/Action – Example

## Issues List

<table>
<thead>
<tr>
<th>Issue #</th>
<th>Issue Description</th>
<th>Assigned To</th>
<th>Date Identified</th>
<th>Planned Date</th>
<th>Revised Date</th>
<th>Resolution/Comments</th>
<th>Current Status</th>
<th>Actual Resolve</th>
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</table>

## Actions List

<table>
<thead>
<tr>
<th>Action #</th>
<th>Action Description</th>
<th>Assigned To</th>
<th>Date Identified</th>
<th>Planned Date</th>
<th>Revised Date</th>
<th>Resolution/Comments</th>
<th>Current Status</th>
<th>Actual Close</th>
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Project Execution – Change

‘Manage’ the Project Schedule

- Project Change
  - Recognize change
  - Accept / manage change
  - Assess impact
  - Approve & implement change (or not)

Integrate change, update project plan, communicate revised plan
## Project Change – Example

<table>
<thead>
<tr>
<th>#</th>
<th>Requested</th>
<th>Date</th>
<th>By</th>
<th>Change Description</th>
<th>Change Assessment / Impact</th>
<th>Assessed Date</th>
<th>Assessed By</th>
<th>Change Decision Date</th>
<th>Decided By</th>
<th>if approved, Change Next Steps</th>
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</table>

**Baseline document / contract / sow & date.**
Project Execution – Communications

Keep the team & stakeholders informed

- Project Communications
  - Stakeholders – manage expectations, tailor message
  - Meetings – effective (agenda, monitored, summary)
  - Email – targeted and tagged
  - Files – standard naming convention
  - Reporting – status reports

The right information at the right time to the right people
## Project Status – Example

### Project Name

Monthly Status Report

<table>
<thead>
<tr>
<th>Project Manager:</th>
<th>Date Created:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reporting Period:</th>
<th>From:</th>
<th>To:</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

### Project Health:
Place an "X" in the appropriate box for the overall health of the project.

<table>
<thead>
<tr>
<th>X</th>
<th>Green</th>
<th>(project is on track)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yellow</td>
<td></td>
<td>(issues or problems may impact completion date, cost, or scope)</td>
</tr>
<tr>
<td>Red</td>
<td></td>
<td>(project won’t be completed by scheduled date, will exceed projected cost, or won’t meet established scope)</td>
</tr>
</tbody>
</table>

### Health Explanation:
Provide a few sentences regarding the overall health of the project.

### Accomplishments:
List the activities that have been completed since the last status report.

- 
- 

### Planned Activities:
List the activities that will be completed by the next status report.

- 
- 

### Issues/Risks:
List any outstanding items of concern as well as any uncertain occurrences that may interfere with achieving the project.

### General Comments:
Enter any important remarks/observations relevant to the project and its status.

### Key Project Milestones

- 
- 

### Project Meetings:

- 
- 

### Project Repository:
Concepts – Project Lifecycle

Project Management Processes

1. Initiating
2. Planning
3. Executing
4. Controlling (and monitoring)
5. Closing
Techniques – Project Close

Achieved your project’s objective

- Project Transition
  - To support / operations
- Project Closeout
  - Lessons learned / continuous improvement
  - Celebration / thank you

“Insanity: doing the same thing over and over again and expecting different results” (attributed to Albert Einstein)
Close – Project Closeout

- Project Summary
  - Description, size, complexity, resources

- Metrics: baseline vs. actuals (variance)
  - Schedule, cost, scope and variance explanation

- Lessons Learned
  - PM Project Lifecycle
  - Process and product related

- Project Repository

- Outstanding Tasks
# Project Closeout – Examples

## ITS Project Inventory - Mini Project Closeout Sheet

**Project Name:** insert Project Name here

### 1. Project Closeout - Summary

Provide a high level description of the project - what was the result or delivered value (new functionality/service, modified functionality/service, removed functionality/service, etc.).

insert summary text here

### 2. Project Closeout - Metrics

Compare the baseline values against the actual results to determine the variance against plan; explain the variance or if no variance, the method used to meet cost, schedule or scope.

#### 2.1 Baseline vs Actual (cost, schedule, scope)

<table>
<thead>
<tr>
<th>Baseline</th>
<th>Actual</th>
<th>Variance</th>
<th>% Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Date</td>
<td>&lt;mm/dd/yyyy&gt;</td>
<td>&lt;mm/dd/yyyy&gt;</td>
<td>#VALUE!</td>
</tr>
<tr>
<td>End Date</td>
<td>&lt;mm/dd/yyyy&gt;</td>
<td>&lt;mm/dd/yyyy&gt;</td>
<td>#VALUE!</td>
</tr>
<tr>
<td>Budget ($)</td>
<td>&lt;$000,000.00&gt;</td>
<td>&lt;$000,000.00&gt;</td>
<td>#VALUE!</td>
</tr>
<tr>
<td>Resources [h/r]</td>
<td>&lt;000.00 h/r&gt;</td>
<td>&lt;000.00 h/r&gt;</td>
<td>#VALUE!</td>
</tr>
<tr>
<td>Scope</td>
<td>text</td>
<td>text</td>
<td>text</td>
</tr>
</tbody>
</table>

Note: Variance & % Variance columns contain formulas.

#### 2.2 Description

Explain the variance or if no variance, the method used to meet cost, schedule or scope, e.g. 1) was the end date met by a) decreasing project scope and/or creating a phase 2 or b) by adding resources/cost, 2) was the scope met by a) extending the end date or b) increasing resources/cost, 3) was the cost met by a) decreasing project scope and/or creating a phase 2 or b) accelerating the timeline.

#### 2.2.1 Cost

insert cost variance text here

#### 2.2.2 Schedule

insert schedule variance text here

#### 2.2.3 Scope

insert scope variance text here

### 3. Project Closeout - Key Takeaway

Document the project’s key takeaway - what was the most important lessons learned (significant new understanding for next project), information on project performance (requirements, scope, cost, resources, schedule, etc.), risk, quality, vendor, etc.

insert takeaway text here

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   4.3 VENDOR MANAGEMENT
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6. PROJECT CLOSEOUT – REVIEW / APPROVAL
Project Repository – MyFiles@bc

- Web-based file-storage system
- Access at bc.edu/myfiles
- Faculty, staff, and students have accounts
- Share files with other members of the team
- Keep track of different versions of the same file
- Receive reports when files are viewed or changed
- Use a consistent convention when naming project-related folders and files
Project Communications – BCPost

- Email Listserv
- Easily communicate with all members of project team at once via email
- Subscribers can request a digest, containing all the messages from a given time period
- All messages are archived so you have a history of discussions
- Learn more and access BCPost at bc.edu/bcpost
Project Communications – Campus Groups

- A group available for emailing, filesharing (MyFiles@bc), web-based collaboration, and voicemail distribution.
- Good option if you need to use the group for functions other than just email.
- Campus Groups do not have all the functionality of BCPost, for example postings cannot be restricted and/or moderated.
- Access through Agora Portal
Project Communications – Email

- Create folders to store all project-related messages
- Use labels/categories to prioritize
- Learn how to sort messages quickly by sender, recipient, subject, date to find key information quickly
- Use a consistent convention for subject lines
- Use “To” field for calls to action and “CC” for conveying information
Project Templates – Microsoft Office

- Built-in Professional Templates (agendas, calendars, schedules, reports)
- “Track Changes” to collaborate with others
- Compare different versions of same document
- Improved sorting and filtering of Excel data
Learn about These and More…

- ITS Training Classes
  bc.edu/training

- Online Microsoft Classes
  bc.edu/mselearning

- The Technology Help Site
  bc.edu/help
Summary

- Projects, project management & you – the “project manager”
- Project Techniques
  - Initiating, Planning, Executing/Controlling and Closing
  - 80/20 rule
  - Apply just the right amount

The more you plan, the luckier you get
References

- PMI®: [www.pmi.org](http://www.pmi.org)
- EDUCAUSE: [www.educause.edu](http://www.educause.edu)
- Northeast Reg Computing Pgm: [www.nercomp.org](http://www.nercomp.org)
- CSOM course: Managing Projects (MD255/MD831)
- BC ITS PMO: [www.bc.edu/pmo](http://www.bc.edu/pmo)

- Thank you
- Session Evaluation
Food for Thought

- If it’s not written down, it does not exist
- Murphy is alive and well
  If it can go wrong it will
- And so is O’Malley (alive & well)
  If it can’t possibly go wrong, it will
- ‘No news’ is not necessarily good news
- Warning: dates in the schedule are closer than you think
- A project becomes one year late, one day at a time

If you fail to plan, you are planning to fail