Does This Come With Instructions?

Creating A Manual for Your Organization's Project Culture

Russell Rivenbark M.P.M.
RCDD, PMP
New Hanover County Schools

"First, have a definite, clear practical ideal; a goal, an objective. Second, have the necessary means to achieve your ends; wisdom, money, materials, and methods. Third, adjust all your means to that end."

Aristotle

- Explore various project management methodologies and their specific applications in the project environment.

- Focus on project management as it relates to information and communications technology (ICT) systems and their implementation.

- Define organizational criteria deemed critical for project success in creating a manual for specific to your organization's project culture.

History of Project Management

1917: Gantt Chart Developed

1957: Critical Path Method (CPM) Invented

1958: Program Evaluation Review Technique (PERT) Invented

1962: Work Breakdown Structure (WBS) Approach Mandated

1965: International Project Management Association (IPMA) Founded

1969: Project Management Institute (PMI) Launched

History of Project Management

1975: PROMPTII Method Created

1986: SCRUM Named as a Project Management Style

1987: Project Management Body of Knowledge (PMBOK) Published by PMI

1996: PRINCE2 Published

1998: PMBOK Becomes a Standard

2012: ISO 21500:2012 Standard for Project Management Released

Ancient History of Project Management?

?

?

?

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

...ANCIENT
PROJECT MANAGER
THEORISTS
SAY YES.
2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Standard

"a collection of knowledge areas that are generally accepted as best practice in the industry"

Methodology

"a set or system of methods, principles, and rules for regulating a given discipline"

Manual

"a small book, especially one giving information or instructions"

Creating **Y**our **P**roject **M**anagement **M**anual
(**YPMM**)

- local universities, community colleges
- professional development organizations
- consultants
- materials such as books, manuals, other PM publications or websites
- organizational assets, training, experience
- and of course, our friend, **Google!**

"Data is like garbage.
You'd better know what you are going to do with it before you collect it."
Mark Twain

Project or Process?

A project shall be defined as “a temporary endeavor undertaken to create a unique product, service, or result” (Project Management Institute, 2013, p. 3)

“An ongoing work effort is generally a repetitive process that follows an organization’s existing procedures” (Project Management Institute, 2013, p. 3).

Is your organization a functional or projectized operation?

Do your project resources have clearly defined roles?

Do they know how their roles support the mission of the organization?

Functional and/or Projectized?

?	Functional	WEAK Matrix	BALANCED Matrix	STRONG Matrix	Projectized
PM's Authority	None	Limited	Low to Moderate	Moderate to High	High to Complete
Resource Availability	Very Low	Limited	Low to Moderate	Moderate to High	High to Almost Total
Project Budget Control	Functional Manager	Functional Manager	Mixed	Project Manager	Project Manager
PM's Role	Part-Time	Part-Time	Full-Time	Full-Time	Full-Time
PM Administrative Staff	None	Part-Time	Part-Time	Full-Time	Full-Time

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Time to Break the Rules!

"To break the rules, first you have to know the rules."

- PMBOK and TPMM, enough?
- Can we talk?
- ROI?

"I want you to find a bold and innovative way to do everything exactly the same way it's been done for 25 years."

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

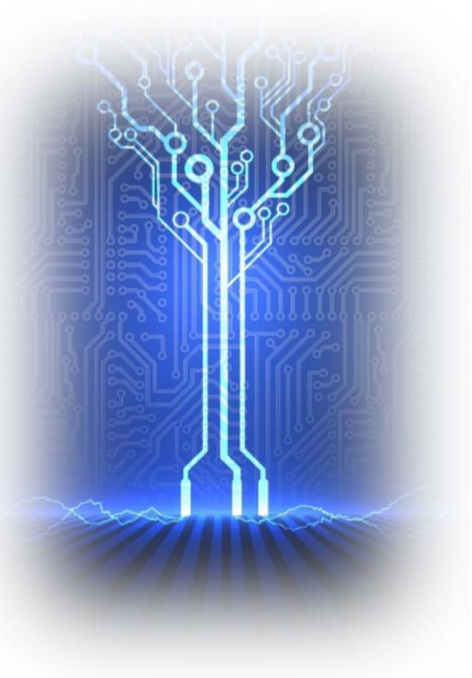
YPMM Goals?

To ensure projects:

- are uniform in their implementation.
- are delivered with minimal disruption to customers and internal organizational resources.
- are completed within budget, schedule, and scope as planned (or not)!
- have a reference and planning guide that is reflective of your organization's PM culture to be utilized by the PM(s), Functional Managers, and Project Team Members.

Criteria for Use

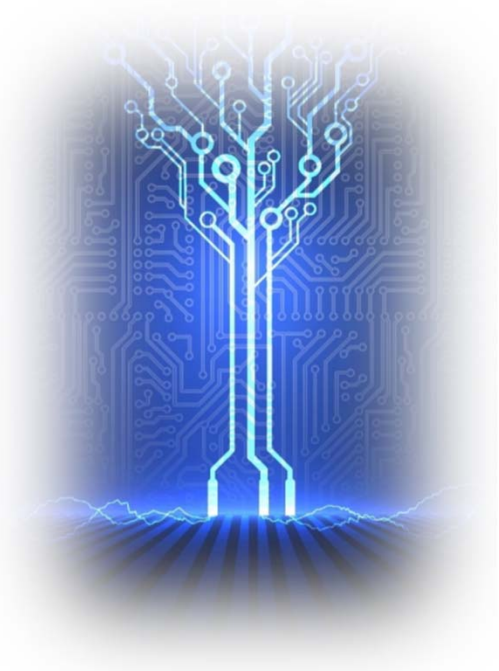
- Organizational leadership has specifically requested that the project fully adheres to the YPMM and the PM to manage the project?
- Project requires team members from multiple functional areas within the organization?
- Project has identified a risk that has the potential to significantly impact project deliverables and/or success?



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Criteria for Use continued...

- The project will require the procurement of outside professional services or resources?
- Not all projects may require **full adherence** to the information and guidance contained within YPMM?
- It is strongly recommended that the YPMM be used as a **reference** in implementing all projects no matter the size or scope



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Assumptions

Are there high-level organizational assumptions that can generally be applied to all projects?

- PM shall act as project manager for all projects requiring full adherence to the manual?
- Who assumes the responsibility of the role of Project Sponsor?
- How is funding and/or budgets for projects established or received?
- Does the organization perform or require long-range planning to establish expected future project costs?

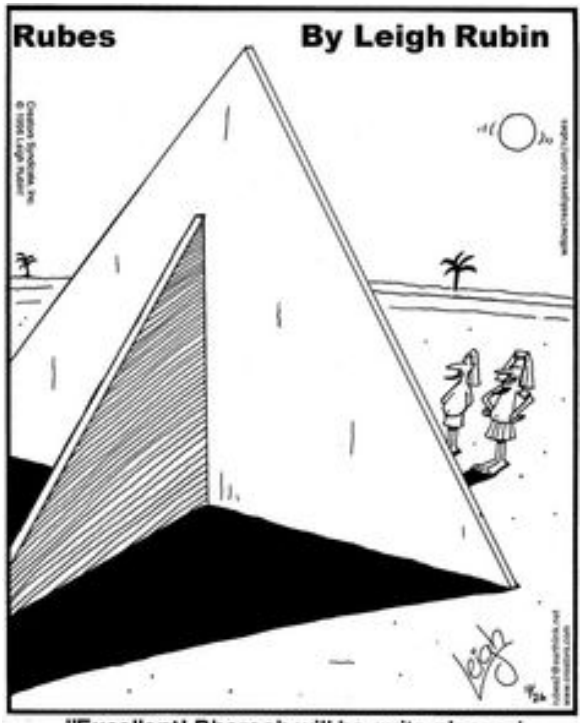
Assumptions continued…

Are there high-level organizational assumptions that can generally be applied to all projects?

- Does scheduling of projects include identifying and estimating tasks and their associated durations in the planning process?
- Are all organizational members subject to be utilized as project resources?
- What level of supervisory authority does the PM have in regards to Project Team Members, Functional Managers, etc.?
- Is the PM expected or considered to be a technical resource on projects?

Project Culture

- What is your overall organization like?
- Organizational leadership style and approach?
- Management of employees?
- What holds the organization together?
- What areas of emphasis drive the organization's strategy?
- Criteria of success?



"Excellent! Pharaoh will be quite pleased to learn that you've completed construction under budget and ahead of schedule."

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Project Culture

Scope

Budget

Schedule

Project Team

Stakeholders

Communication

- Project management can best be described as a practice!
- YPMM is to be considered a living document that is reviewed and updated as necessary—set a date!
- Project management concepts should be addressed to highlight the unique adaptations and assumptions that govern your project management process, **or culture!**

Scope

- Scope definition process should include all relevant stakeholders to ensure agreement of project expectations and deliverables.
- PM should create a Stakeholder Register to manage influence and information.
- It is understood that the final scope definition is not necessarily *written in stone* as there will inevitably be change during the project lifecycle.

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Example

Stakeholder Register	Project Title:	New Hanover County Schools Engaging Students, Achieving Excellence
Project Sponsor:		
Project Manager:		

ID #	Stakeholder	Title	Role	Power (L, M, H)	Influence (L, M, H)	Expectations	Requirements

Budget

- Budget is directly related to the accuracy or inaccuracy of the scope.
- Change will occur! Contingency funding/amounts approved by ???
- The budget should be inclusive of all costs associated with the project. Typical items to include in the budget are all hardware, software, licensing, and after-warranty maintenance care.
- Document all costs associated with using internal resources. This will ensure the budget reflects the total cost of ownership of the deliverable(s).

Schedule

- The schedule and the budget are inextricably connected as any inaccuracy or change in the scope affects them both.

- Using a WBS? Identify tasks in the sequence in which they need to occur. Once sequenced, task durations should be determined.

- With the WBS, tasks sequenced, and durations estimates completed—develop the project schedule. PMIS?

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Project Team

- How are team members acquired—Functional/Projectized?
- Project resources often include outside vendors, temporary labor, consultants, SMEs, and integrators.
- To help assist the PM with task assignments of all project team resources, a Responsibility Assignment Matrix (RAM) should be created.

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Example

RACI Matrix	Project Title:	New Hanover County Schools Engaging Students, Achieving Excellence
Project Sponsor:		
Project Manager:		

Responsible-**A**ccountable-**C**onsulted-**I**nformed					
	Role/Title	Role/Title	Role/Title	Role/Title	Role/Title
Activity/Task					
Activity/Task					
Activity/Task					
Activity/Task					
Activity/Task					

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Stakeholders

- The PM should identify the stakeholders in the *Planning* process of the project lifecycle.
- Identify the stakeholders as to their level of interest and influence, or power, which they may have over the project.
- A Stakeholder Registry should be created to reflect stakeholder engagement levels and communication preferences.

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Communication

- Create a communication plan, or strategy, to include the specific type(s) of information required of each stakeholder.
- An effective project manager MUST communicate. Bad news is better than no news!
- Stakeholders can be a valuable resource for determining solutions for the many issues that can affect the project lifecycle.

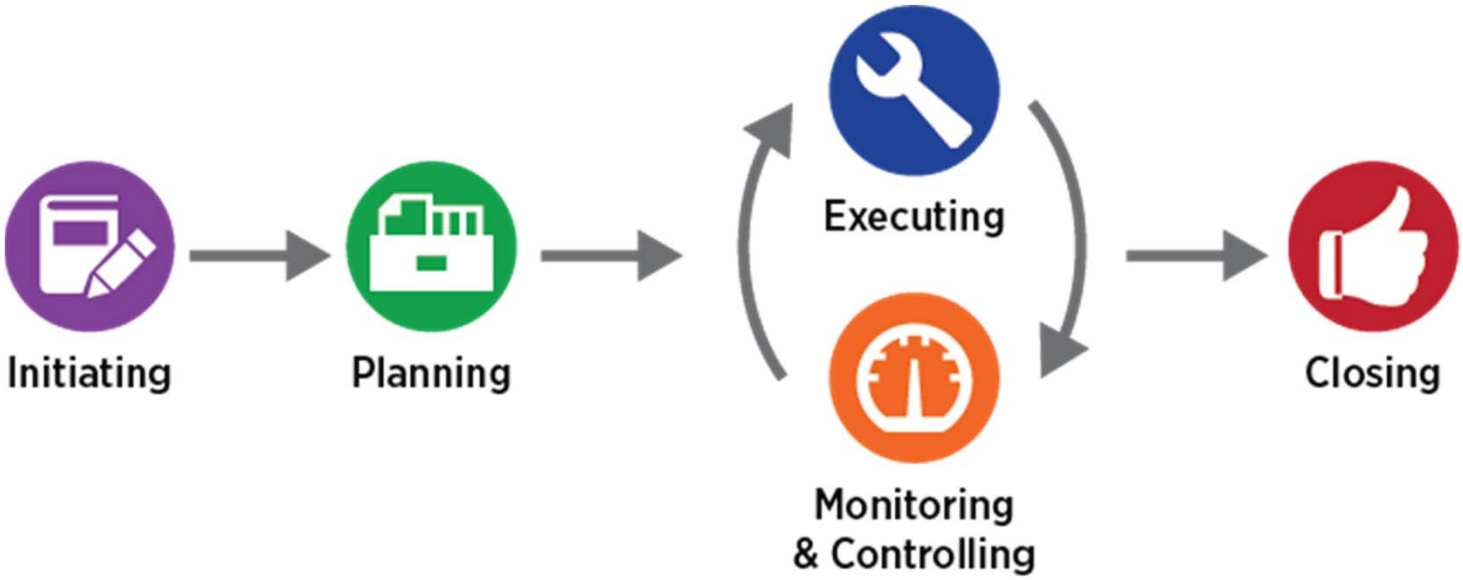
2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Example

Communications Plan	**Project Title:**	New Hanover County Schools *Engaging Students, Achieving Excellence*
Project Sponsor:		
Project Manager:		

Stakeholder(s)	**Information Type(s)**	**Media Type(s)**	**Frequency**	**Timing**

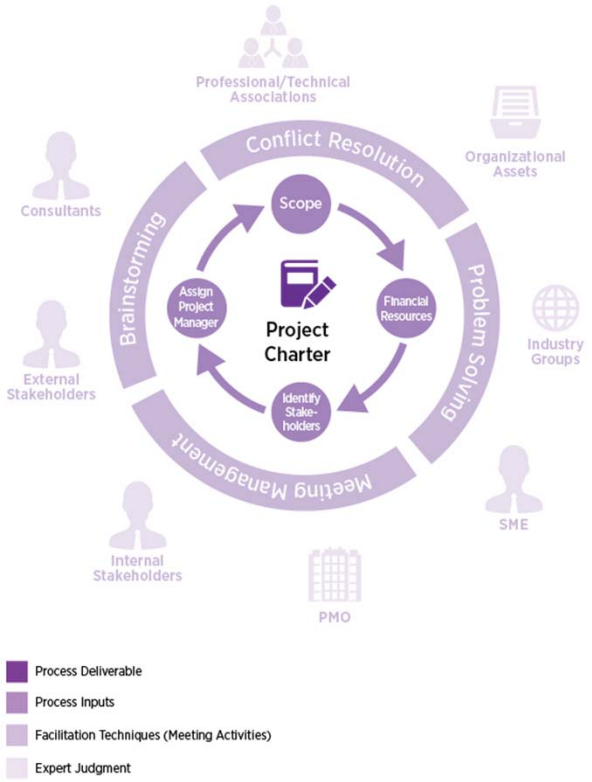
PROJECT LIFECYCLE



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Initiating

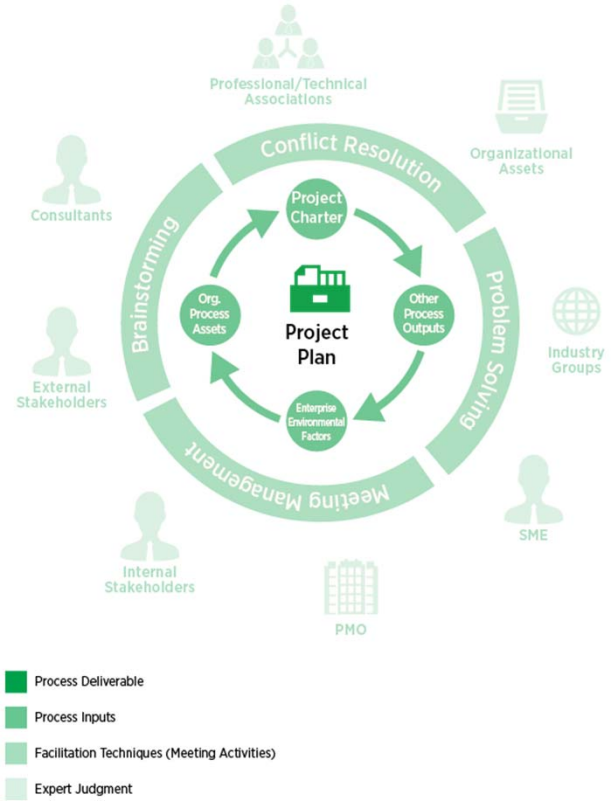
- The *Project Charter* and the *Stakeholder Register* are foundational documents requiring significant effort by all project participants.
- The *Project Charter* will define the project in regards to its purpose, objectives, and success criteria.
- A high-level schedule and budget should be created with a more detailed version of these two components of the charter to come later during the *Planning* process.
- The PM should take care in documenting each stakeholder, their expectations, and level of influence that they can have on the project.



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Planning

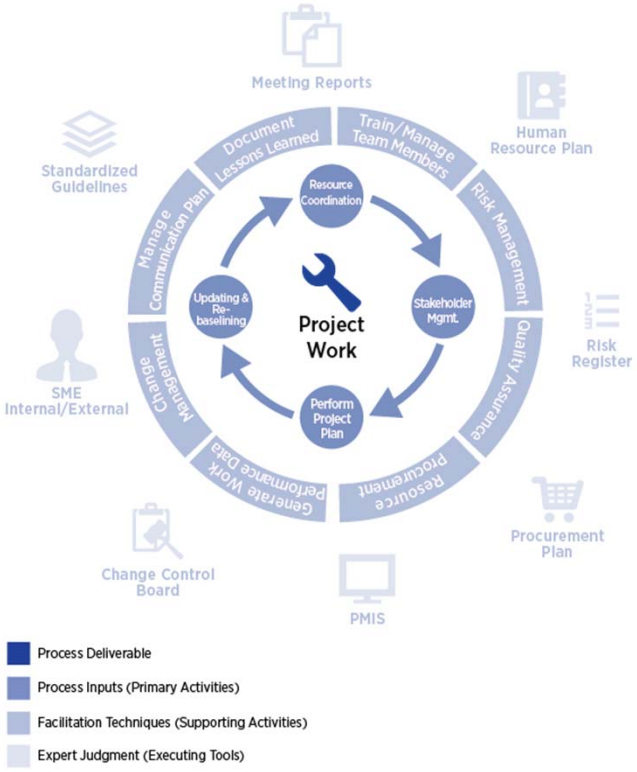
- The PM will address all processes from each of the ten knowledge areas to create the *Project Management Plan*.
- This will be the baseline for which all project activities are measured and success criteria ultimately defined.
- The PM should consider the inclusion of all relevant stakeholders in planning the project.
- The *Project Management Plan* includes the management of change, quality, procurement, and risk.
- *Human Resources, Stakeholder, and Communications Management Plans* should also be developed by the PM.



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Executing

- The *Executing* process chart gives the PM a brief overview of activities and tools in achieving the primary deliverable which is essentially the beginning of performing the project work.
- It is important to note that this is the start of a process that will undergo multiple iterations as the project progresses.
- The PM should understand that *Executing* cannot be exclusive of *Monitoring and Controlling*.
- Communications is a primary task of the PM during *Executing* in order to manage stakeholders, conduct procurements, and direct and manage the project work.



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Example

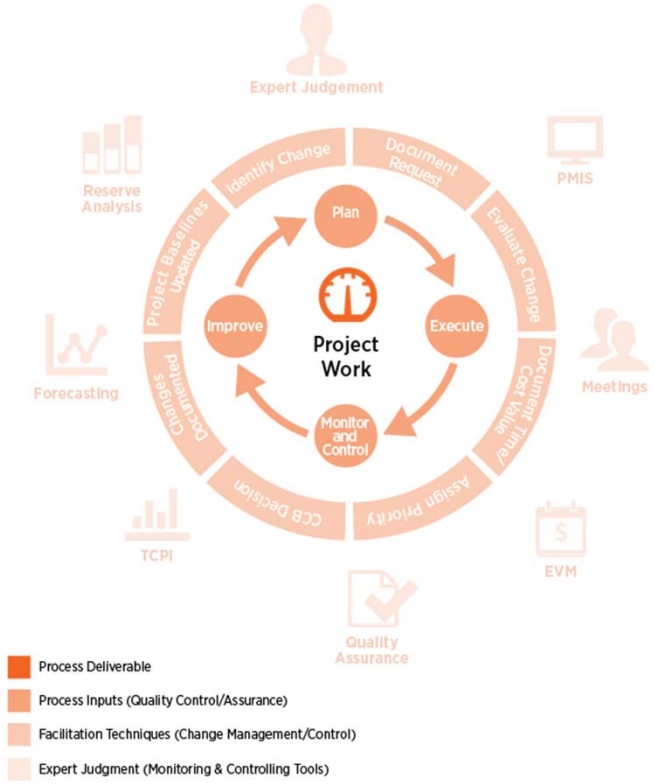
Change Request	Project Title:	New Hanover County Schools Engaging Students, Achieving Excellence
Project Sponsor:		
Project Manager:		

ID #	Requestor	Change Description	Reason/Benefit of Change	Effect on Schedule	Effect on Budget	Status (Approved/Denied)

2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Monitoring and Controlling

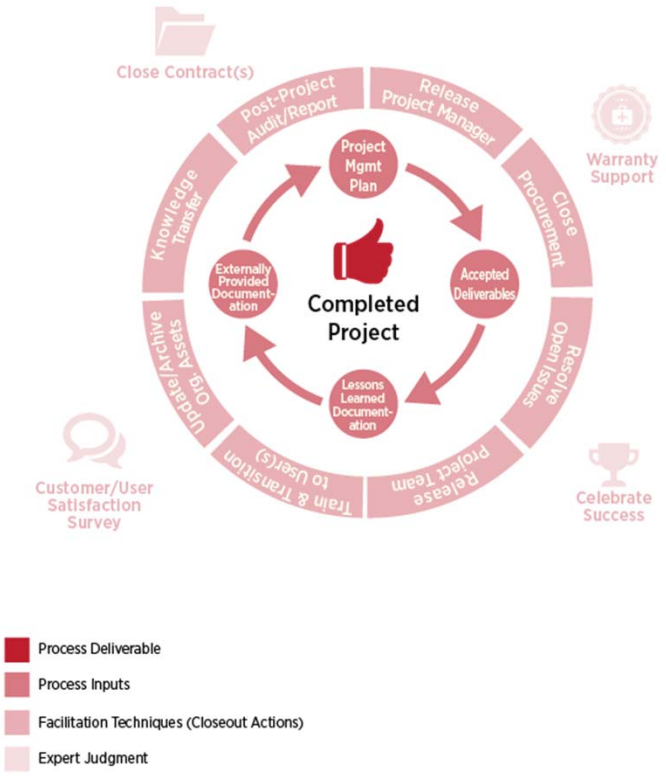
- Comparing planned versus actual progress related to quality of deliverables and manage all changes required to keep the project on schedule and within budget. Process?
- All approved changes should be incorporated into the *Project Management Plan* as the project progresses.
- The goal of all this activity is to control the project scope and thereby it's schedule and cost.
- Manage stakeholders as planned.
- Communicate!



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Closing

- PM should CLOSE, CLOSE, CLOSE!
- GOAL: Update all organizational assets.
- GOAL: Close out all procurement activities.
- And of course, **deliverables have to be accepted as defined** in the *Project Management Plan* for the above two process goals to be fully exercised.
- Celebrate!



2018 BICSI WINTER
CONFERENCE & EXHIBITION
Orlando, FL | February 4-8

Conclusion

How do you “do” projects?

- Explore and determine the best methodology for your organization.
- Focus on project management as it specifically relates to what you do and how you do it.
- Identify your organization's project culture and write the manual that reflects its criteria for project success.

Your way!

Does This Come With Instructions?

Creating A Manual for Your Organization's Project Culture

Thank You!

Russell Rivenbark M.P.M.
RCDD, PMP