

Project Management Approach (M1000A)

Introduction

This **Project Management Approach** document is designed for use in managing the University of Michigan Administrative Information Services (MAIS) projects. This document contains an overview of the deliverables and processes involved in project management. The emphasis is on the effective and efficient execution of projects, building upon the lessons learned during previous projects for continual improvement. Replicable processes and defined deliverables support this goal. The end result should be enhanced quality and efficiency of staff efforts in accomplishing project goals and objectives.

Project Management phases can be viewed as an envelope of processes used in managing the System Development Life Cycle (SDLC), where the project objectives and deliverables are created (see Appendix A for diagram of this concept). Information on the MAIS SDLC methodology can be found on their website.

Project Management Phases

The scope, size, and complexity of a project will affect the number of deliverables which should be produced in order to adequately manage the proposal and execution of the project. The larger and more complex the scope of the project and project team, the more imperative it is that project activities and changes be closely tracked, analyzed and reported. The smallest projects will not require the same level of detailed tracking, analyzing and reporting, however, project managers may determine that the defined deliverables are useful aids in accomplishing the tasks of project management for any scale project. The scalability of Project Management Deliverables required for various project sizes, as determined by MAIS management is defined in M110: Project Deliverables Log.

Project Definition & Startup

The purpose of this phase is to refine the definition of the project objectives and establish the proper project management and quality control environment for the project at its onset. The foundation of every successful project is a detailed definition of the project that is understood and agreed to by all stakeholders. Remember, the project proposal and initial budget should have been approved prior to entering the Project Definition phase.

This phase creates the initial working documents that will be used to manage the execution of the project, including:

- Set up Project Document Repository on a network drive and make it accessible via the MAIS intranet projects web page.

- Project Plan Schedule Summary
 - Deliverables-based.
 - Use the MAIS Project template in PlanView as basis for PMM and SDLC phase structure.
 - * Project plans in PlanView are most effectively used when time-tracking tasks are kept at a higher level for groups of project tasks.
 - * MS Excel or MS Project may be used for tracking a more detailed level of project tasks or action items.
 - Identify effort and resources required to create each deliverable.
 - Specify time duration and target delivery dates for creation of each deliverable.
 - Identify predecessor and successor relationships of tasks.
 - A task should be for a unit of work no more than 80 hours.
 - Identify major milestones throughout the project – completion of key deliverables.
- Project Issues Log (Including Risks and Change-Scope Control)
 - Identify any initial issues.
 - * Develop plan for addressing them.
 - Identify any initial risks.
 - * Predict the likelihood of each occurring.
 - * Quantify the impact of each should they occur.
 - * Develop a plan for addressing each.
 - Identify any initial changes to the project.
 - * Define the impact of any change on the scope of the project – schedule, budget and deliverables.
- Project Deliverables Log
 - Identify each deliverable to be created and its acceptance criteria.
 - * Project Management Deliverables.
 - * System Development Life Cycle (SDLC) Deliverables.
- Project Roles, Responsibilities, & Training Requirements
 - Identify each role and associated responsibility.
 - Identify who will fill each role.
 - Identify training requirements for each role.
- Project Communication Plan
 - Define meeting schedules, objectives, and attendees.
 - Define periodic project status reports to be created, contents, and metrics, and the role(s) responsible for their creation.
 - Identify where the project document repository will be and the access path to it.

Project Execution

The purpose of this phase is to manage every aspect of project delivery to assure the project is successful. At this point, the Project Definition has been signed off and approved and the project management working deliverables have been established. In this phase, the execution of the project is being managed and its progress tracked to the plans established during Project Definition. To ensure the project stays on-schedule and within budget, performance is monitored against the project plan and adjustments are made as necessary.

This phase consists of the following project management activities:

- Project Administration - Weekly Team Meetings and Periodic Stakeholder Project Review meetings – to review project health and progress, major accomplishments, and any changes in issues, risks, or scope.
- Project Reporting – Weekly individual status reports, Weekly Project Score Card, Monthly Project Status Reports, Time Reporting, Budget to Actual Reports, Project Variance Reports, and logging of Lessons Learned.
- Project Control – Weekly update of Project Schedule / Plan and Management of Issues, Risks and Changes and Scope.
- Project Health Checks and adjustments as needed.

Project Administration and Reporting

Status is reported to the Stakeholders and other MAIS management via status and review meetings, Project Status Reports, Project Score Cards, and other management reports which may be produced from time to time. The goal of these meetings and reports is to help evaluate the “health and progress” of the project against the Project Definition. These status meetings and reports provide Stakeholders and Management a consistent view of the project accomplishments, commitments, and challenges.

Lessons Learned should be captured throughout the life of the project, using the Lotus Notes database for timely capture of lessons realized, which can provide the project team with immediate feedback in status meetings, enabling the incorporation of improvements in work approach and processes the current as well as future projects.

Project Control Management

Project Control Management involves the management of issues, risks, and changes. For a project to be successful, issues must be quickly and effectively resolved before the Project Schedule / Plan is negatively impacted. During Project Execution issues are identified, logged, and tracked through to resolution. Escalation procedures are used to ensure that issues are given the proper level of attention, based on priority and potential impact to the project.

Resolution of some issues may require changes to the project’s scope. The goal is to assure all changes are documented, tracked, and reviewed with the Stakeholder.

In the Project Initiation Phase, an initial Risk Assessment Profile was generated. But as projects progress, the probability and impact of risks change and new risks may surface. In this phase, risks must be continually assessed and actively managed. The goal is to implement mitigating actions to minimize risk and to engage everyone involved to actively manage the risks.

Project Health Checks

The intent of the Project Health Check is to ensure project success and repeatable positive outcomes throughout the organization. Project Strengths should be capitalized on and used as a model for other projects within MAIS. Areas for improvement need to be quickly identified and remediated.

Post Project

The purpose of this phase is to properly manage the closure of a project. The manner in which we complete the project will provide a lasting impression, and it is important that it be a positive one. This phase should begin before the completion of the Project Execution Phase. The major goals for this phase are to:

- Facilitate the completion of the project execution tasks and obtain final project acceptance from the Stakeholder.
- Arrange for the transition of the Project Team members off of the project to new assignments.
- Final Project Health Check – to confirm that all project deliverables and control documents have been created, acknowledged, and filed.
- Ensure the project’s documentation and history is properly preserved for future reference.
- Identify, analyze, and communicate “lessons learned” so future projects can benefit from the knowledge gained on previous projects. The project management and/or SDLC methodology should be updated to incorporate any lessons that impact them.

Status and Reporting Metrics

Periodic status reporting for projects will typically be created by individual team members, which are then rolled up into reports by working teams, phases, and finally for the project as a whole.

The intent of project status reports is to communicate the progress of the project towards accomplishing its objectives, within the parameters of the plan. Metrics or measuring parameters are used to describe this progress, showing how the actual performance of the project measures up against the planned schedule, budget, and deliverable quality parameters. Typically, if variances of actual from planned parameters are $\geq 10\%$, they are deemed to be of significant impact to the project. This threshold may vary by project size.

Status reports should include information on:

- Progress towards completing project deliverables.
- Status of Issues – open, new, resolved.
- Changes to Project Scope – impact on schedule, budget.
- Any changes to risks – additions, realized, mitigations.
- Variance Report on project resource hours – actual to budget.
- Budget to Actual Comparison on project expenditures.
- Phase Specific Parameter – such as Testing Incidents (open, new, resolved) for System Test Phase.

Assumptions and Risks

Project assumptions and risks are initially defined the Project Proposal Phase and later refined in the Project Charge/Scope document. They are referred to throughout the project. If any original assumptions do not hold true, additional issues, changes or risks to the project are the likely result. Should any of the potential risks be realized during the project, planned mitigation issues will need to be executed potentially resulting in additional issues or changes to the project.

Assumptions

The project schedule and budget are created within the context of the initially identified assumptions and risks. Assumptions should be identified regarding:

- Project Scope and Boundaries.
- Stakeholder Support.
- Staffing.
- Timeline.
- Hardware and Software.
- End-User Training.

Risks

Risks to a project are often related to defined assumptions. Should any of the initial assumptions of the project fail to hold true, potential risks could then impact the project. Initial risks to a project should be identified and defined by:

- Category.
- Probability of occurring.
- Impact to the project.
- Planned Mitigation Actions.

Deliverables

Project Definition & Start-up

- *Project Start-up & Kickoff Checklist (M1170)*
- *Project Charge Document (M101)*
- *Project Plan Schedule Summary (M102)*
- *Project Issues Log (M104)*
- *Project Roles, Responsibilities, & Training Requirements (M107)*
- *Project Communication Plan (M108)*
- *Project Deliverables Log (M110)*
- *Project Kickoff Meeting Agenda (M111)*

Project Execution

- *Project Meeting Agenda (M131)*
- *Project Meeting Minutes (M312)*
- *Project Variance Report (M134)*
- *Project Status Report (M135)*
- *Project Score Card (M136)*
- *Lessons Learned (Lotus Notes) (M137)*

Project Health Checks

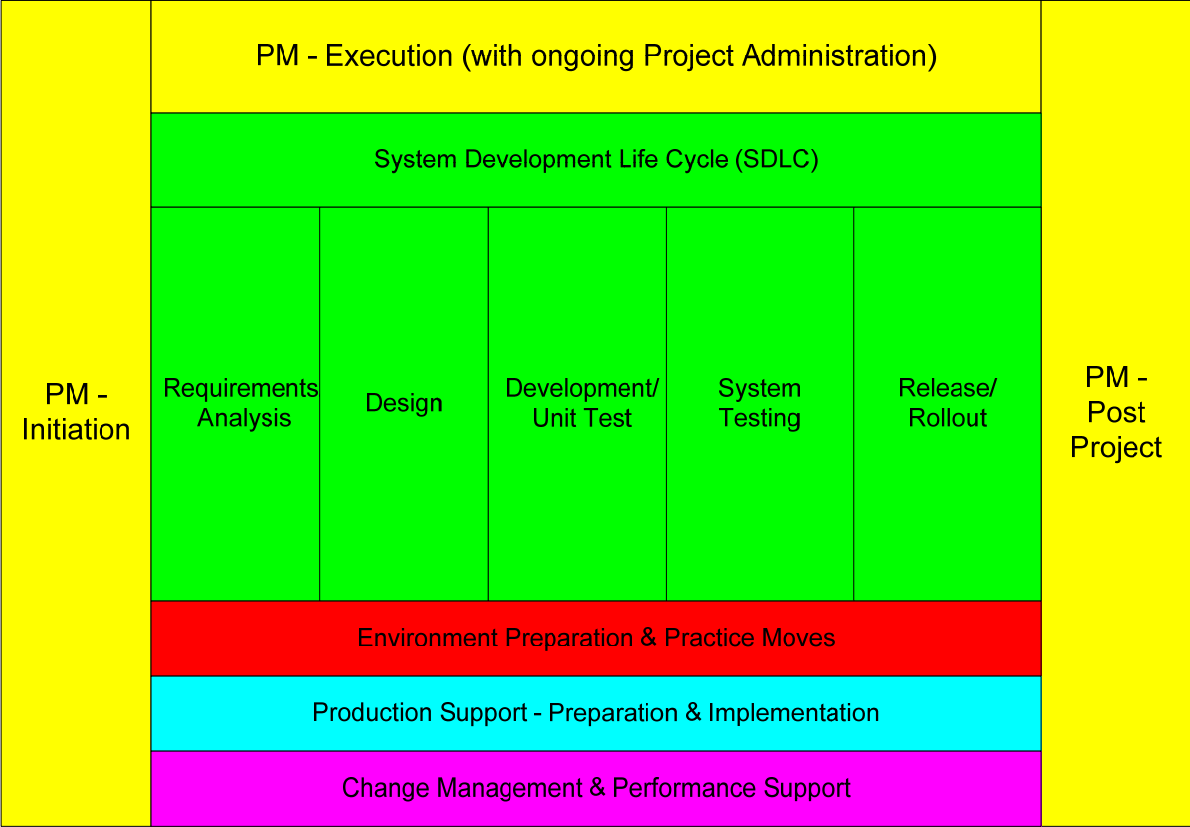
- *Project Health Check Approach (M1400A)*
- *Project Health Check Plan (M141)*
- *Project Health Check Questionnaire & Report (M142)*

Post Project

- *Project Conclusion Acknowledgement (M190)*
- *Project Lessons Learned Feedback (M191F)*
- *Project Lessons Learned Summary (M191S)*
- *Post Project Checklist (M192)*
- *Project Closure Executive Summary (M193)*

Appendix A

**Project Management Methodology (PMM) Envelope
Around the
System Development Life Cycle (SDLC)**



**Document Change Control
Project Management Approach (M1000A)**

Version Number	Date	Revision Author	Description
1.0	6/6/08	SS-KS	Converted to .docx format with new logo.
2.0	6/23/08	SS-PS	Edited minor template text.
2.0	6/23/08	SS-KS	Approved for production.

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