

Project Management

Tips and Lessons Learned by Laura Burger, PMP

September 17, 2019

Tidewater ARMA Chapter Meeting

Success looks like...

- ▶ Share tips and lessons learned
- ▶ Challenge you to think outside your normal project method
- ▶ Inspire you to celebrate your victories both professionally and personally

Tip #1: Start with the End (Big Picture)

- ▶ What is the purpose of the project? What will success look like? What might impact the project? How will risks be mitigated? How will the project be evaluated when complete?
- ▶ Five phases of a project
 1. Initiating
 2. Planning
 3. Executing
 4. Monitoring and Control
 5. Closing
- ▶ Do all of the above while constantly keeping in mind the project scope, budget, and schedule
- ▶ Historical Information
 - ▶ Who has done this type of project before?
 - ▶ What are the lessons learned?

Tip #2: Identify Where You Fit in the Project

- ▶ Leader or Contributor?
- ▶ Stakeholders
 - ▶ RACI chart: Responsible, Accountable, Consulted, Informed
 - ▶ Useful for large projects
 - ▶ Responsible - Doing the Work
 - ▶ Accountable - Responsible for Work Completion
 - ▶ Consulted - Assists with useful information and/or guidance
 - ▶ Informed - Kept aware of project progress

RACI Chart Example

RACI Matrix Template

Responsible - Accountable - Consulted - Informed

Project Deliverable (or Activity)	Project Leadership					Project Team Members					Project Sub-Teams					External Resources				
	Executive Sponsor	Project Sponsor	Steering Committee	Advisory Committee	Role #5	Project Manager	Tech Lead	Functional Lead	SME	Project Team Member	Developer	Administrative Support	Business Analyst	Role #4	Role #5	Consultant	PMO	Customer	Role #4	Role #5
Role																				
Initiate Phase Activities	A/C	C				R/A	A/C	A/C	C											
- Submit Project Request						R											A			
- Request Review by PMO	I	C				R/A	A/C	A/C	C				C			C	A/C			
- Research Solution	I	A/C	I	I		R/A	C	C	C				C			C	C			
- Develop Business Case																				
Plan Phase Activities	C	C				R/A	C	C	C				C			C		I		
- Create Project Charter	I	I	I	I		R/A	C	C	C	C	C	C	C			C	I			
- Create Schedule	I	I	I	I		R/A				I	I	I	I			C	I	I		
- Create Additional Plans as required																				
Execute Phase Activities	C/I	C/I	C/I	C/I			R/A	R/A	R/A	R/A	R/A					A/C		I		
- Build Deliverables	I	I	I	I		R/A	R/A	R/A	R/A							C	I			
- Create Status Report																				
Control Phase Activities		C	C	C		R	A	A	A	A						C	I	I		
- Perform Change Management																				
Close Phase Activities	C	C	C	C		R/A	C	C	C	C	C	C	C			C	C			
- Create Lessons Learned	I	I	I	I		R/A	I	I	I	I	I	I	I				I	I		

Credit: <http://templatelab.com/raci-chart>

Tip #3: Use Colors

RACI Matrix Template

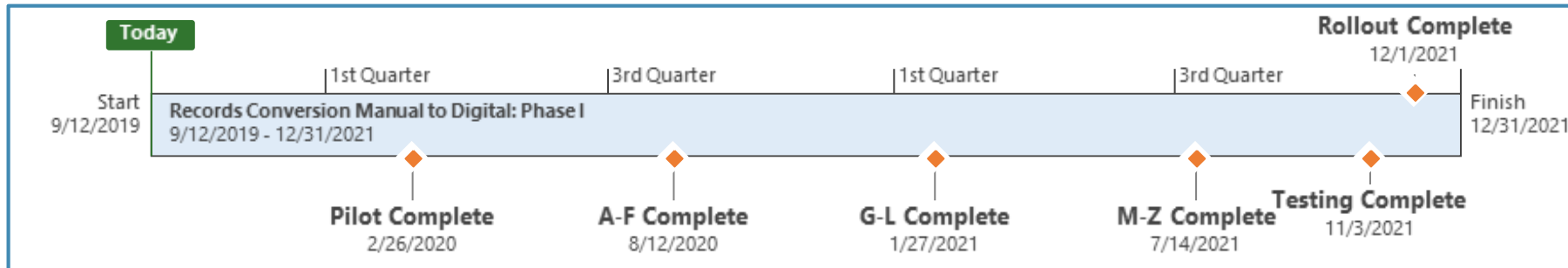
Responsible - Accountable - Consulted - Informed

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- Research Solution	I	A/C	I	I		R/A	C	C	C			C			C	C				
- Develop Business Case																				
Plan Phase Activities	C	C				R/A	C	C	C			C			C		I			
- Create Project Charter	I	I	I	I		R/A	C	C	C	C	C	C			C	I				
- Create Schedule	I	I	I	I		R/A				I	I	I	I		C	I	I			
- Create Additional Plans as required																				
Execute Phase Activities	C/I	C/I	C/I	C/I			R/A	R/A	R/A	R/A	R/A				A/C		I			
- Build Deliverables	I	I	I	I		R/A	R/A	R/A	R/A						C	I				
- Create Status Report																				
Control Phase Activities		C	C	C		R	A	A	A	A					C		I			
- Perform Change Management																				
Close Phase Activities	C	C	C	C		R/A	C	C	C	C	C	C			C	C				
- Create Lessons Learned	I	I	I	I		R/A														

Credit: <http://templatelab.com/raci-chart>

Tip #4: Identify Milestones

- ▶ Records Conversion from Manual to Digital: Phase 1
 - ▶ Start with the end: **Must be done by 12/31/2021**
 - ▶ Pilot departments complete by 6/30/2020
 - ▶ A - F departments complete by 12/31/2020
 - ▶ G - L departments complete by 6/30/ 2021
 - ▶ M - Z departments complete by 9/31/2021
 - ▶ Troubleshooting complete by 12/31/2021



Tip #5: It's Okay to Ask for Help

- ▶ Communicate warning flags early
- ▶ Be mindful of the overall schedule & milestone dates



Tip #6: Document Along the Way

- ▶ Event Planning Example
 - ▶ A well developed schedule clearly communicated to stakeholders
 - ▶ Checklists, especially if the event is off-site
 - ▶ Contact list of all key team members with phone numbers including on-site points of contact
 - ▶ Event run sheets down to the minute
 - ▶ Notebook and pen handy at all times (like a good server in a restaurant!)
 - ▶ Lessons learned will be easy to pull together when the project is complete
- ▶ Meet as a team after the project is complete to share lessons learned

Tip #7: Celebrate Your Success!

- ▶ Celebration is the book end to the project
- ▶ Value in seeing accomplishments
- ▶ Honest praise goes a long way

“I’m not sure what is worse, but I will say I’ve been at some awkward “celebratory” lunches where there wasn’t much celebrating going on and it felt more like an obligation than an opportunity for fun.

Nevertheless, celebrating milestones along the path toward our goals is a crucial component of engagement. It helps honor the hard work folks are putting in, incentivizes reaching goals, and generally just creates a more positive environment. This can apply to both students and staff. We all need a little encouragement and could use breaks in our work days to have some fun.”

Dustin Ramsdell | April 3, 2018

“Why You Need to Start Celebrating Milestones”

Tip #8: Personal Project Management

- ▶ Everything from home improvements (especially when hiring a contractor) to wedding logistics
- ▶ Vacations
- ▶ Fitness goals
- ▶ Learning a new hobby

“Happiness Is The Joy You Feel Moving Towards **Your Potential.**”

-Shawn Achor

Questions/Comments?

Responsible Identify Where You Fit
Red Flag Identify Milestones
Success Looks Like

Project Management **Use Colors**

Personal Project Management Document Along the Way

RACI Chart

ACCOUNTABLE

It's Okay to Ask for Help **Start with the End**

INFORM

Consult Celebrate Your Success!

References:

- ▶ [Program Management Improvement Accountability Act](#) (PMIAA) signed into law December 14, 2016
- ▶ [Reed Integration](#) is an Engineering Services Company with free Project Management Template Downloads
- ▶ [Template Lab](#) - 21 free RACI Chart Templates
- ▶ [Old Dominion University Project Management Courses](#)
- ▶ ODU-*Online* [Project Management Online](#)
- ▶ [“On the Edge” by Alison Levine](#) - Team Captain of the first American Women’s Everest Expedition shares lessons learned
- ▶ [Why You Need to Start Celebrating Milestones](#) by Dustin Ramsdell
- ▶ [The Presence Blog](#) - Creating amazing student experiences, one post at a time
- ▶ [Big Potential](#) - by Shawn Achor