5 Steps to Project Success

The Project Life Cycle for Lite Projects

ISC PMO – Deborah Sartin, Director
Overview of Project Management
What is a Project?

• A temporary endeavor undertaken to create a unique product, service, or result. The temporary nature of projects indicated by a definite beginning and end.

• Projects are often used as a means of achieving an organization’s strategic plan.

• Project managers have to continuously manage the project constraints of cost, schedule, scope, resources, and quality.
<table>
<thead>
<tr>
<th>Project Stage</th>
<th>Project Activity</th>
<th>Result</th>
</tr>
</thead>
</table>
| Discover      | • Determine Feasibility  
• Research Options | Project Request |
| Define        | • Define Project Scope, Milestones & Budget  
• Identify Project Risks, Assumptions & Constraints  
• Define Stakeholders & Project Team  
• Define Project Governance | Project Charter |
| Plan          | • Conduct Project Kickoff  
• Create Functional Requirements, Technical Design & Process Impacts  
• Define Project Acceptance  
• Create Project Schedule  
• Identify Training & Post Project Support | Project Plan |
| Manage        | • Provide Project Oversight & Communication  
• Lead & Support Project Team  
• Manage Project Risks, Issues & Decisions  
• Conduct Project Reporting  
• Process Project Changes | Status Reports |
| Close         | • Create Lessons Learned  
• Celebrate Project Completion | Lessons Learned |
What is most important for Project Management?

- Details?
- Tools?
- Communication?
- Timely decisions?
- Collaboration?
- Adapt to the unexpected?
The Triple Constraint + Quality

- **Time**
- **Budget**
- **Scope**
- **Value, Benefits, Metrics**
Organizational Excellence

Portfolio Management

Operations

Processes

Projects
The Art

Communication
Leadership
Motivation
Organization

The Science

Scheduling
Budgeting
Reporting
Risk

The Art and Science of Project Management
Project Management Life Cycle Stages

**PMI**

- Initiating
- Planning
- Executing
- Monitoring & Controlling
- Closing

**ISC**

- Discover
- Define
- Plan
- Manage
- Close

*Project Management Institute*
Project Management Life Cycle

Discover → Define → Plan → Manage → Close
Project Manager Responsibilities

• Understanding and managing project communications
• Balancing priorities
• Monitor and Control Project Constraints
• Manage Project Deliverables (Results of all the work)
• Team Leadership
Step 1 Discover - Propose the Project

• Identify the problem to be solved by the project and the desired end result.

Design a Problem Statement:

• What are you trying to achieve with the project?
• What is the business need?
• Who will use the project deliverables when they are complete?

Project Selection Criteria:

• How do you evaluate your possible projects?
• How do you prioritize your projects?
Submit a **Project Request**: 
Step 2 - Define the Project

Identify Stakeholders and Create the Project Charter:

- Identification of stakeholders
- Identification of the project manager and project sponsor
- Definition of the project based on business need and cost-benefit analysis
- What the project includes (the scope), what it doesn’t (establishes boundaries)
- Goals, constraints, success criteria, benefits, risks
- Estimated project budget
- Formal agreement for signature
Roles include:
- Customer(s)
- Sponsor(s)
- Business Unit
- Anyone/everyone else with a stake in the project

Analysis should take into consideration:
- Interest
- Influence
- Role
# Create the Project Charter

<table>
<thead>
<tr>
<th>Business Need</th>
<th>Why</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective(s), Scope</td>
<td>What</td>
</tr>
<tr>
<td>Deliverables, Risks, Budget</td>
<td>How</td>
</tr>
<tr>
<td>Estimated Timeframe</td>
<td>When</td>
</tr>
<tr>
<td>Roles &amp; Responsibilities</td>
<td>Who</td>
</tr>
</tbody>
</table>
Create a **Project Charter**:
Step 3 - Plan the Project

• Document the details about how the project will be managed

Address all the Project Processes:

• Establish the Project Baseline - Scope, Schedule, Budget
• Quality, Risk, Procurement
• Human Resources, Communication
• Integration
Why Develop a Project Plan?

• To provide a consistent approach to planning and tracking projects

• To coordinate divisional goals and prevent duplication of effort or rework

• To define how all the elements of the project will be managed

• To preserve the knowledge of how changes were made to processes or systems
Milestones, Activities, Tasks, and Deliverables

- **Milestone**: a major outcome of work done
- **Activities**: work to be accomplished within a defined period of time
- **Task**: subset work of an activity
- **Deliverable**: an output of work that can be viewed as a “product” of the work
Project Schedule & Budget

- Scheduling a project helps gain a clearer picture of:
  - Time needed to produce deliverables
  - Resources
  - Possible outside influences that might impact the project
  - Critical Path

  *Allow time in your schedule for unplanned changes.*

- The Project Budget defines all the costs associated with the Project
  - One-time
  - Ongoing
  - Total Cost of Ownership
Remaining Project Processes

- Quality for Project Deliverables
  - Establish quality measurements
  - Distinguish between project deliverables and business deliverables

- Communication
  - Determine the type and frequency of project communication including how to track issues

- Risk
  - Establish a risk log and a risk contingency/mitigation approach

- Procurement
  - Establish a plan for acquiring resources needed for the project
Create a **Project Plan**: 
Step 4 - Manage & Lead

- Once you have your project plan completed and proper authorization has been given to begin the project, you are ready to implement your plan.

- This stage of the project includes coordination of people and other resources to implement the project plan by performing the activities in the plan.

- An important distinction is to manage the plan and lead the team.
Project Kick-Off Meeting and Project Communications

• Officially launch the project with a Project Kick-Off meeting

• Project Communications
  • Team
  • Sponsor
  • Customer
  • Stakeholders

• Celebrate!

• Lessons Learned throughout the life of the project
Keeping the Project on Track

• Proactively Monitor – risk watch

• Control the Baseline – triple constraint

• Project Issues
Status Reports and Project Documentation

- Determine frequency of status reports and use the project baseline as a guide

- Determine the other types of documentation appropriate for the size of your project

- Establish a central repository for all project documentation
Project Change Requests

• The project manager monitors change without derailing the project

• Change requests must be reviewed and submitted for approval

• Revise the Project Plan according to approved changes
Create a Project Status Report:
Step 5 - Close

- Obtain Customer Acceptance
- Lessons Learned?
  - What was done well?
  - What should be improved?
- Archiving project documents
- Transition from project to operations
Create a Lessons Learned Report:
Operations & Support

• What ongoing support will be needed after the project has officially closed?

• What is needed to sustain the change created?
  • Communication
  • Performance Metrics
  • Process Improvement
  • Resources (people, equipment, licensing etc.)
Project Management Tools & Templates

• Lite Project Guidebook

• Lite Project Workbook (Excel)

• Teamwork

• Smartsheet

• https://www.isc.upenn.edu/lite-project-management-toolkit - Lite Toolkit Site (PennKey required)
Additional Resources...

For more information about project management best practices and project management support contact a member of the PMO Team at PMO-ISC@upenn.edu.

We are happy to help you be successful with your project!!
Questions
Thank You!