



IT Project Management

a practical approach



Time



Resource



Money

*“helping IT managers of the world
achieve moreTM success”*





Practical IT Manager GOLD Series

IT Project Management ***a practical approach***

2nd edition



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Introduction



Mike Sisco, ITBMC

Hello and welcome to the ***Practical IT Manager GOLD Series***. I'm Mike Sisco, President of MDE Enterprises, Inc. and a career IT manager and CIO of more than 20 years.

Since 2000, I have devoted my life to, "*helping IT managers of the world achieve more success*". My practical processes and tools are used by thousands of IT managers in every part of the world.

The challenge of managing technology resources has never been more demanding than it is now. Change occurs more rapidly and technology resources are in more demand than ever before.

People and companies respond to strong leadership. Effective leadership skills give a technology manager an edge in creating and maintaining a stable business environment. This leads to more success and an IT organization that's valued and appreciated by the business managers of your company.

The material contained in the entire ***Practical IT Manager GOLD Series*** of books has been developed from my experience in managing technical organizations of all sizes for more than 20 years. The examples are 'real life' experiences of things I know to work, or hard lessons learned from things that did not work. I developed every process and tool you will learn about to help me manage IT organizations during my career. They worked for me and will for you as well.

Two tools I use to enhance the material or to clarify a point are:

Sidebar: a comment or clarification to help make a point

Personal Note: a personal experience or "war story" to reinforce a point.

You will find a bit of humor to make the reading more enjoyable and to emphasize certain points. Because of my very "dry sense of humor", you may have to look for the humor, , , sorry about that. I also hope you like the images I pop in at times to make the reading more interesting.



The **Practical IT Manager GOLD Series** includes the following titles:

IT Management-101: fundamentals to *achieve more*[™]

IT Assessment: the key to IT success

IT Strategy: align your IT vision for business value

IT Organization: right-size your organization for success

IT Project Management: a *practical* approach

IT Staff Motivation and Development: build a world class team

IT Asset Management: tracking technology assets

IT Budgeting: operational and capital budgeting made easy

IT Due Diligence: merger & acquisition discovery process

IT Assimilation: consolidating redundant technologies

What to Look For in a CIO: get more value from your IT investment

, , , **plus more titles to come**

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Interested in our IT Manager Institute and IT Business Manager Certification (ITBMC) program? It is one of the most successful IT manager training programs in the industry and available in both classroom and self study formats. Go to www.itmanagerinstitute.com for details.



Managing IT organizations at a high level is serious business, but having fun along the way is also important. I hope you find the material helpful in your quest and welcome your feedback. You may contact me at mike@mde.net .

Best regards and success,

Mike Sisco, ITBMC

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IT Project Management

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I. Project Management, , , Key to IT Credibility

The key to IT credibility is being able to deliver projects successfully, , ,
on time, , ,
within budget, , ,
and meet client needs.

Sounds pretty simple doesn't it?

It should be but unfortunately the IT world has given itself a credibility "black eye". Are you aware there are studies that suggest IT project failure rate to be as high as 70%?

70%

Let's say these studies are seriously exaggerated, , , and the failure rate is only half of what they say. It would still be 35% failure, , , and that's simply terrible. If 3 out of 10 of our projects fail, IT credibility is shot.

You simply cannot be a credible and reliable IT organization if you cannot deliver projects successfully, and let's face it, , , projects are what we do in IT all the time.

Project failure is real. I've seen it for years in organizations I've joined and in companies we have acquired. Studies and surveys confirm it every year.

It is a **very big problem!**

IT project failure costs companies around the world billions in lost capital and productivity every year.



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Project failure is such a big issue that I include it as one of the three key reasons an IT organization fails. In my book **IT Management-101: fundamentals to achieve more** I highlight project failure as a key threat to success in the **Triple Threat to IT Success™**.



More focus is being placed on project management skills by companies of all sizes. The reason is that failed projects are huge impacts to a company's plans and can even affect Profit and Loss (P&L) projections. Nothing gets the attention of the CEO more than negative impact to profitability.

However, many companies do not instill a project management process in their company. This is more true of small and medium size companies. There seems to be essentially three reasons why this is the case with smaller companies:

1. They don't realize it is needed.
2. They do not know how to manage projects.
3. It requires too much work and discipline.

The result of having no project management discipline in your company is obviously going to be lots of project failure.

Large companies are not immune to project failure, , it is also high in big companies, but for a different reason, , we will get to what I believe to be the **underlying reason for project failure** in companies in just a few minutes.



You see, big companies invest millions in project management. They recognize the problem and understand the implications of failed projects, , , financially, in lost productivity, and in employee morale.

Project failure takes a big toll out of companies.

The problem is that you would think this issue would get better, but high failure rates are consistently reported year after year in companies of all sizes and in all industries.

The reason you would think the problem would decline is because of:

- Lots of press about it
- Dozens of solid project management methodologies available
- All kinds of tools and education available
- Project management certifications have increased tenfold



Yet IT project failure remains high year after year and it is killing our IT credibility.

Managing projects is not all that difficult if you know what to do. Sure, there are complex projects, , , but the processes and tools you need to deliver a complex project can be simple, , , practical and simple works very well.

Let me explain. I've been managing projects since the late 1970's when I joined IBM as a Systems Engineer (SE). My job was to install new computer systems and software for companies who were purchasing their very first computer system.

It was the mini-computer era and an exciting time. No one used the term "project management" then, , , there were no official methodologies or project management certifications. The Project Management Institute (PMI) did not exist, , , it was the dark ages to be sure.

But what we knew how to do was deliver and install computer systems and get business applications up and running predictably and efficiently.

In fact, in my rookie year at IBM I installed 13 systems, , , more new systems than any SE had ever installed from our office. I received a Regional Manager's Award for it and a nice bonus check.

Every system went in like clockwork and there were times when I had three installations going at the same time while supporting more than 30 existing clients in a large 9,000 square mile territory, , , in all kinds of industry, , , manufacturing, healthcare, distribution, construction, and retail.



There was no project management software, , , Microsoft didn't exist, , , and we didn't even have spreadsheets in these early days.

OK, OK, , , you now know I'm an old guy.

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What I'm trying to convey is that we managed large projects very well with pencil and paper, , , no automated tools, , , not even spreadsheets. You see, there were no laptops in those days.



Not only that, our clients had zero knowledge of technology because it was their very first computer system.

Pencil and paper, , , hmmm.

What I did have was a project schedule of sorts, , , although we didn't call it that in those days. IBM taught me the proper steps to install a new system, , , from start to finish. Then they gave me a pad of forms to use to create an installation schedule.

We called it an Installation Plan, , , project management didn't exist in the early days.

But here is what happened, , , computers and systems technology grew at a rapid pace as you know. With this growth came a need for technology support, , , the IT ranks grew in leaps and bounds in the 1980's and 1990's.

With this growth evolved IT organizations in virtually every company of any size. And what do all IT shops have in common? They implement projects to add new servers, new software, perform upgrades and convert one system platform to another platform.

The IT world is always filled with projects of all types.

With all of this project activity we started seeing project failure after failure. In fact the problems with IT project failure essentially created a multi-billion dollar industry in something we now call **project management**.

This is why organizations like PMI and dozens of others are so successful in developing methodologies, tools and training to deal with the problem.

The project management movement began to grow very fast in the 1990's. Prior to 1990 you rarely saw anyone with a project management certification like the PMP (Project Management Professional). Today if you want a project management job, you almost have to have a PMP to get in the door for an interview.

Not only that, prior to 1990 you rarely saw a job profile for Project Manager.

So, there has been tremendous focus on project management in companies throughout the world, , , yet project failure remains high.

Why?



Here it is, , , the **underlying reason for project failure** in IT organizations is because of “who we are”.

That’s right, our personality traits actually contribute to our downfall in being able to manage projects effectively.

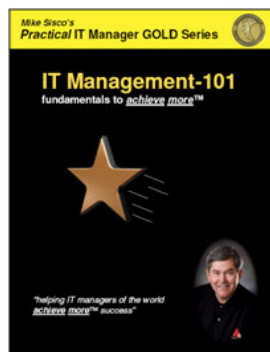
You see, the vast majority of us in IT have similar personality types, , , better described as work behavior profiles. I’ve observed and researched this issue for more than 15 years and what I have discovered is startling.

Put me in a room of 10, 50, or 100 IT people and I can tell you the work behavior profile make-up of the room, , , and get it correct every time. I’ve seen it consistently as a CIO when our company acquired over 40 companies and in conducting considerable more research on the topic.

Initially, I thought it was just a coincidence that different IT organizations had the same work behavior profile mix, , , over time I just realized, , ,

IT attracts a certain type of personality

I’m not going to spend time to discuss all the details here other than to mention the traits that cause us a problem when it comes to project management. If you want to learn more about IT employee work behavior traits and the Triple Threat to IT Success, take a look at my book, **IT Management-101: fundamentals to achieve more**.



Over 70% of us in IT are introverted. All this means is that we are shy and more reserved outside of our immediate network. 90% of us are technically oriented, , , a good thing. 90% of us are high detail, , , also a good thing.

What helps us succeed as technicians gets in our way as managers. Our affinity for technology and high detail traits are great for technical jobs, , , but not so great for managing projects.

Being introverted is not really a problem for a programmer, a systems administrator, or even someone on the Help Desk. But when you become a project manager or an IT manager, strong communication skills need to be a core competency.

Most of us in IT are introverted and shy as I mentioned, , , over 70%. This usually means our communication skills are weaker plus there is another very big challenge that comes with being introverted.

Our desire to communicate outside our inner circle is lower, , , it's not important for us to talk just to be talking, , , to socialize. We aren't sociable types unless it is with our buddies, , , our inner circle.

Personal Note: An example might help you with this one. I'm introverted just like 70% in IT are. My wife is extroverted. Maybe it's true opposites attract.

Dorine is always telling me about conversations she has with complete strangers in the grocery store. Lengthy conversations and she learns some of the most amazing things.

It never happens to me, , , **never**. The reason is because I don't make myself approachable, , , I'm not really open to a lot of casual conversation with people I don't know, , , why bother, , , I'm there to get a few things and get out!

And there is also the thought of I don't really have much to say that anyone would be interested in.

Obviously, this is not the case. Also, it's not that I don't speak to people and enjoy others, , , but I tend to focus on my mission and get in and get out. Dorine might spend twice the time at the grocery to do the same thing as I would, , , she is extroverted and likes communicating with people.

Introverted people do not get charged up by this, , , it simply isn't as important for us.

Well, if you are a project manager, , , you have to communicate effectively outside of your inner circle. This lower desire to communicate hampers our focus on project management and doing what we need to do to deliver a project successfully.

Poor communication is the primary culprit that causes project failure.

I'll bring these work behavior challenges up as we walk through this book to point out why we struggle with certain aspects of project management, , , and why these struggles cause lots of project failure in the IT world.



The fact there is so much project failure presents you with a **tremendous opportunity** as an IT manager. When your team begins delivering projects successfully it will separate you from other IT managers who do not.

Remember, , ,

Project success is the key to credibility

Understanding the dynamics of project management can separate you from your counterparts and help you establish a success rate to be envied. These successes make you more valuable to your company and enhance your career opportunities.

Suddenly, you become a manager who can do what he says he can. This is powerful and makes you the manager people will trust, , , again, it is a credibility factor.

It will also give you insight to develop project management skills in your organization. A strong technical resource with solid project management capability is hard to find, but it is the type of resource you want to have throughout your organization.

Incorporating these skills in your organization allows your team to accomplish more in a predictable fashion and to create credibility.

credibility factor

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I mentioned the Project Management Institute (PMI) and their PMP certification earlier. The PMI web site is www.pmi.org.

If you are interested in obtaining a PMP certification you will find dozens of companies who provide PMP preparatory classes.

One company in particular that I've observed to do an excellent job in the project management space is TenStep, Inc. This company provides worldwide resources for project management including training, tools and templates, and consulting services.



See www.tenstep.com.

Tom Mochal, President of TenStep, and I developed a series of e-Learning training containing over 160 sessions in the **20 Minute IT Manager** series.

See www.20minuteitmanager.com. Topics fall into five main categories:

- Project management
- IT management
- People management
- Leadership
- Professional development



I do not have a PMP certification, but I have successfully managed hundreds of large projects in my career. If I were planning to seek employment as a project manager, I would definitely obtain a PMP certification.

You don't need a PMP in an IT manager role but it won't hurt. If you run large projects, you may want to invest in your people and have them obtain a certification.



Sidebar: Just because you have a PMP or some other type of project management certification does not mean you can manage a project successfully. What it says is you have gained the knowledge and passed an exam stating you know how to.

Knowing how and actually doing it are two separate issues.

When I recruit a project manager the fact he has a PMP is noteworthy but not what I'll base the hiring on. I'm much more interested in what the person has accomplished, how he handles certain situations, and whether he can show me he knows how to deal with people, clients and project issues.

I'll learn this in an interview and documentation he can provide, , not by looking at a PMP certificate.

There are three key things senior managers want out of any project you manage:

1. Complete the project on time
2. Complete the project within budget
3. Deliver what the client expects

They want a predictable result with no surprises.

Think about this for a minute. Isn't this exactly what you want from your vendor who is delivering new technology for you?

You know it is.

NO SURPRISES !!

Establish a consistent track record of managing projects successfully and you will gain a considerable following from senior managers, department managers and their employees, , , even IT employees of your company.

In this book, we are going to keep it simple. I'm going to give you a project management process I've used for hundreds of projects, , , no theory, just practical steps and tools that will help you deliver projects successfully.

Remember, I come from the days of pencil and paper, , , so it had to be simple.

You can get complex and bogged down in detail to the "nth degree", but the reality is you don't have to in order to be successful. My approach is as simple and straightforward as you will find, , , but it works and that is the key.

There are 6 key parts to manage a project effectively using my approach:

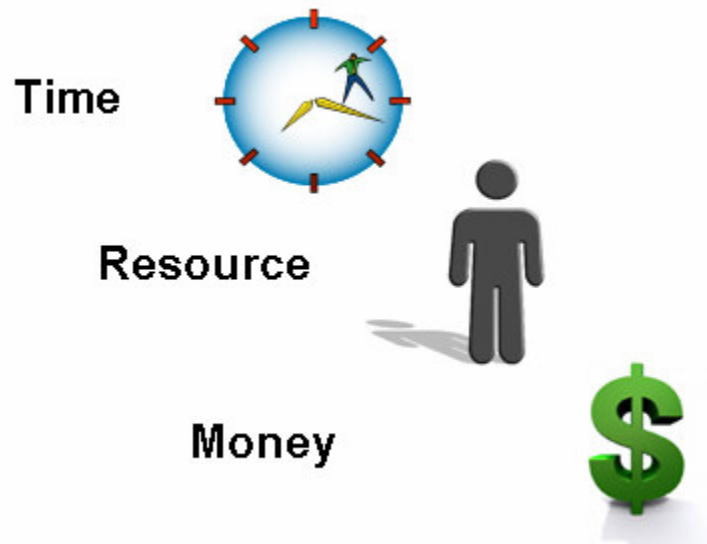
1. Define the project objectives
2. Quantify project deliverables
3. Identify resource requirements
4. Develop a budget
5. Develop the project schedule
6. Execute and monitor the plan

We will discuss each of these parts in detail in the following chapters.

II. Projects Have a Triple Constraint

All projects have a triple constraint. Do something that affects one of them and you tend to have repercussions that affect one or both of the other two.

The triple constraint is:



There are a couple of dynamics you have to think about when putting a project plan together. First of all, resource availability and money can dictate when you can work on a project, , , they can literally force the timing of a project.

Timing is impacted by a lot of things, , , things like spend more money to go faster, , , or go slower to reduce risk, , , or wait to start the project when a key resource is available.

Here is another example. Let's say you are in the middle of a project and a key resource gets sick and can't work on the project. This disruption can certainly affect the delivery timing of the project and maybe even the cost of the project.

The point is that there are three key constraints in a project. Do something that impacts one of the constraints and it usually has an impact on one or both of the other two constraints.

Be aware of the triple constraint to project management as you develop a project plan and go about executing it.

Another cautionary thought to consider is this:

Projects cost more and take longer than you expect

That's right, , , consider this the **golden rule of project management**.

I'm sure you have started a small technology project in an area you are not so familiar with. You think the project is going to take one to two hours to do, , , and before you know it, you have spent half the day and still have no end in sight.

A challenge your IT employees have is that they want to be accurate and precise, so they build in time and money for things assuming everything is going to go exactly as planned.

Unfortunately, things rarely happen exactly as planned.

If you do not have buffer built into your plan, your odds of delivering a project successfully are pretty low.

We will discuss this issue much more in the pages that follow.



III. Define the Project Objectives

Your CEO approaches you and says he wants you to automate a part of the business.

Fantastic, you have a project and we are “off to the races” to do something that has the highest visibility in the company.

Whoa, , , you need to stop right there.

Never start a project until you fully understand the goal and objectives of the project. For example, automating a component of the business has a lot of implications. It might be needed for most anything, such as:

- Reduce costs to improve profitability
- Maintain a competitive edge
- Catch up with competition
- Position the company for a new product offering
- Improve staff productivity so we can grow without hiring

Remember what I said in the first chapter about, “our personality traits tend to cause project failure”? This is the first part of it and let me explain what’s going on.

First, a summary of the majority of IT employee work behavior traits:

- Over 85% have a high sense of urgency.
- Over 70% are introverted and shy.
- Over 90% are independent self-starters who like to get things done.
- Over 90% are high detail who want to do things done “our way”.

What this means is the vast majority of us in IT have a personality that says, , ,

Let's do it
Do it now
Do it my way
I don't want to discuss it

This type of personality wants to get the project assignment and get after it so they can complete it and get on with the next project, , , high sense of urgency and poor communicators with anyone outside their immediate network or inner circle.

The vast amount of project failure is caused because IT people do not do the up front work to clearly define the project and set appropriate client expectations.

We are so geared to doing the work, , , we fail to define and organize the work so we can actually be successful.

Remember this, , , if you do not know the project objectives and reach agreement on the specific deliverables of the project, **you have 0% chance of success.**

Defining the objectives and quantifying the deliverables are the two up front pieces that must be completed before you work on any of the project tasks.

Let's go back to our example for just a minute, , , "automate a part of the company".

The CEO who wants this may not know what the full implications are of automating this part of the business, , , or even be able to articulate why he wants it.



Part of defining the project goal and objectives is to validate that the project is appropriate and to determine what the true objectives are. Working through this with the CEO may indicate other approaches are actually more beneficial in achieving his goal.

Collaboration and discussion between the business managers who want certain things with IT managers who manage technology support is a key first step.

So, before you simply start working on tasks, it's important to establish exactly why the CEO wants this particular project accomplished, , , and what it is.

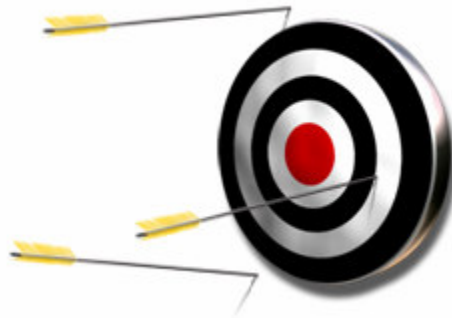
As you get into the conversation, you might discover that this project is really only one part of a series of projects that accomplish the ultimate goal he has in mind. You might also determine that the project, while important, is not the item that can do the most to achieve the CEO's goal.

You may also discover the goal impacts other current projects or planned projects.

Defining a clear cut goal and objectives is critical before you begin developing a plan.

Without a full understanding, it's possible, even likely that you will complete the project and miss the goal. What a travesty that would be! It happens all the time.

Everyone is usually in such a hurry to get started, especially if the CEO asks for help, that people charge after what they think is the target.



It's impossible to hit a target if you haven't clearly defined what it is and gained validation from those who are asking for your help.

Defining the project objectives and the project deliverables are the most important parts of effective project management, and possibly the easiest, , , yet this is the part so many in IT fail to do. It comes back to our personality traits, , ,

**Let's do it, , , do it now, , , do it my way, , ,
and we will not be discussing it!**

Another example might help you visualize the importance of defining the project objectives. Assume you are in a company that has acquired two other companies and senior management wants the technologies consolidated.

Again, there are many implications to the statement, "assimilate the technologies of our three companies onto one platform". If you do your job in defining the goals and objectives for these two projects, you will learn several things before you begin work.

- A. Is there a preference of assimilating either company first and why?
- B. Are there cost reduction goals? If so, which company offers the best opportunity?
- C. Are there inherent risks associated with either technology?
- D. Which of the three technologies provides the greatest long term benefit to the company? It's not necessarily the acquiring company's technology.

There are probably many other factors that will be discovered. The key point is that you should analyze the options surrounding a goal to determine the best path to take to achieve the goal. For example, as you look at the second point, "Are there cost reduction goals?", two items should come out of this discussion:

- A. How much cost reduction should we anticipate?
- B. How fast should we expect the savings to occur?

The easier assimilation project may be the one that offers the least cost reduction opportunity. If significant cost reduction is the goal, you probably want to lead with the other technology assimilation that offers the most cost savings.

Understanding the goal and objectives of a project is paramount to achieving success in any project.



Your ability to question and discuss a project with the sponsor, usually a business manager, determines how successful your team will be. The initial request may not tell you everything, , , in fact, it often does not.

A project manager or manager who sizes up a project request has to get underneath the issues to determine exactly what the true objectives are and if there are any preconceived ideas about what the project will do for the project sponsor.

Defining project objectives is not difficult but it means you have to sit down and talk with your client, , , someone who is probably outside your inner circle.

If you allow the project to take off without clearly defining the objectives and quantifying the deliverables, , , then you have set yourself up for failure.

As we discuss how to develop a project plan and manage it successfully in this book, we will work through a sample project. **Our project is to develop a small Intranet.**

Let's assume senior management gives you the following project request: Develop a secure (employee access only) company intranet application that will be available to all employees.

This is a general request, , , your company wants to develop a basic Intranet for the company and will start with just a few functions. It helps to be a bit more specific so you meet with the project sponsors to better understand the objectives of the project.

After the meeting, you revise the Project Objective to:

Project Plan **Intranet Project - Objectives**

“Create a company Intranet platform to provide an employee communication vehicle that reduces the cost of producing and distributing company newsletters, employee manuals, and operations policy and procedure manuals”.

Once you have agreement on the goals and objectives, it is time to get even more specific and quantify exactly what you need to deliver in this new project. The next chapter is titled, Quantify Project Deliverables.

IV. Quantify Project Deliverables

Now that you have determined the goal and objectives of a project, it's time to quantify exactly what is you need to deliver.

Your sample project objectives are:

“Create a company Intranet platform to provide an employee communication vehicle that reduces the cost of producing and distributing company newsletters, employee manuals, and operations policy and procedure manuals”.

To begin with, these objectives are now fairly specific, but you need more definition before you start working on the project. You should gain an agreement on what the specific project deliverables will be.

These first two steps are probably the most important parts in delivering a successful project. You have to spend the necessary time and effort to define exactly what is expected of the project and gain agreement with the project sponsor.

Otherwise, your team is going to work hard and probably miss the expectation, , , and this means your project won't be successful.

As I mentioned before, our “IT personality type” tends to challenge us in this area, , , we would much rather get the assignment and just go do the work.



Conduct whatever assessment is required to define what you need to deliver in as much detail as possible. You must be very specific with this part. The tighter your definition of deliverables, the better for you and the client.

This section initiates a process of managing your client's expectations. Do a great job with this and you have a much better chance of success.

An important note at this juncture, , , we haven't talked about a timeframe to complete the project. It is premature to discuss timelines until you nail down the deliverables.

Have you ever been in a discussion that goes like this?

Sr. Manager, “We need you to complete ‘x’ project.”

IT Manager, “No problem, we will get right after it.”

Sr. Manager, “Do you think you can be finished in 6 months?”

IT Manager, “Sure, , , no problem.”



It often happens just this way. In this scenario, the IT Manager hasn't defined the goal and objectives nor determined the specific deliverables. There is no way he knows if he can complete the project within 6 months.

Let's take a stab at defining the deliverables for our Intranet project example. Once again, you will get to this by asking questions and assessing the need with the business managers who are the ultimate clients of the project.

When you look at our sample project goal, there are two major elements:

- A. Communication of company news
- B. Reduce cost of production and distribution of:
 - 1. Employee Manuals
 - 2. Operations Policy & Procedure Manuals

There is also another subtle item defined in the objectives description.

“Employee communication vehicle” is a broad term and opens up the possibility of providing more value to the company as you complete the project. For example, a company with many distributed offices often has a challenge in maintaining its employee directory for contact information.

A simple feature that has benefit and visibility might be to add an employee maintained Employee Directory. Such a feature can be developed quickly, requires almost no maintenance, and has immediate benefit to employees and managers.

Personal Note: This Intranet project is a real project I encountered in a company. The Employee Directory idea came about as we discussed the needs for Human Resources and the Operations group requirements as we defined the project deliverables.



After you discuss the project needs at length with the project sponsor and key clients who will be involved in determining if the project is successful, you should document the specific project deliverables you plan to provide.

Let's assume you define your Intranet project deliverables to be:

Project Plan

Intranet Project - Deliverables

1. Develop a secure (employee access only) company Intranet application that will be available to all employees with access to the company network.
2. Functional features will include:
 - A. **Company News** section to be maintained and updated by the CEO administrative assistant on a weekly basis
 - B. **Human Resources** section that includes:
 - 1) Employee Manual
 - 2) HR announcements maintained by the HR staff
 - C. **Operations** section that includes:
 - 1) Operating Policy and Procedures Manual
 - 2) Operations announcements
 - D. **Employee Directory** built to be employee maintained

The project now has specific deliverables that can be confirmed by the project sponsor who initiated the request.

Before you meet to confirm the deliverables will meet the need, it will be wise to estimate how big the project will be and the cost. You will probably be asked.

A reasonable approach would be to develop a rough estimate for each function based upon your knowledge of the work required. You don't need to detail everything out at this point, , , just enough insight to estimate the project and answer obvious questions.

An estimate will include:

- Resource requirements
- Estimated time to complete each deliverable
- Expected project cost

When you meet with the client, be sure your client knows you are there to confirm the deliverables. Any discussion concerning time, cost, and resource is estimated and will be quantified after the deliverables are "nailed down" to begin the project.

V. Identify Resource Requirements

Once the project objectives and project deliverables are determined, it's time to start developing the details of the project itself. The first step of planning will be to quantify the resources you will need to complete the project.

Resources you will need to quantify include:

- Staff
- Equipment and cost related items
- Other resources

Let's discuss each.

A. Staff

The first step in identifying a project resource needs is to determine the staffing requirements. Staff resources are generally the harder resources to line up simply because they are always going to be in high demand.

As you look at any project, you have the opportunity of staffing it internally, contracting outside resources, or going with a combination of the two. The type of project and the work involved will dictate to a certain extent which method works best.



In addition, staff availability will influence how you approach a project or the timing of when you work on a project. The ultimate driver of a project will be the business need.

For the Intranet project, you need a variety of resources to work on it. Sorry, but a single web site programmer isn't going to be enough to do the job.

To determine what you need, break the project down into components of the kind of work required. The work components I see are:

1. Define the application requirements and features
2. Design the application sections
3. Set up a domain address on the company network
4. Create firewall security to prevent unauthorized access
5. Program the application
6. Test and QA the application
7. Develop user documentation
8. Train employees
9. Manage the project

Nine types of work are needed that will require the following type of resources:

- Project Manager
- Application designer
- Web site programmer
- Network Administrator
- QA resource
- Documentation/Trainer

If you are lucky, several types of work can be accomplished by the same individual. In our example, we are going to assume they can.

In addition to identifying the necessary resource, you need to estimate the amount of time you will need from each resource. Part of this is difficult since the project has not been completely defined, but you should have enough to approximate the amount of time our Intranet project will take.



It's not all that difficult, , , just think about the Intranet project for a moment.

How much time does it take a Systems resource to create a domain for your Intranet?
A few minutes, , , maybe up to an hour worst case.

How much time to setup security and validate the security is working?
"Depends!", , , you say. Yes, that's true, but for something as simple as we are doing, , , 2 days is plenty of time don't you think?

How much time does it take a programmer to develop a small web site application for posting the company newsletter and providing a Company News section?
Not long, , , one week at most depending upon the design.

Is this a full time job for a project manager? If not, what would you estimate it to be?
My estimate would be maybe 25% of a project manager's time, , , also very conservative for a simple project of this nature.

You don't just pull the estimates out of the air, , , use your experience and judgment based upon what you understand about the project and what you know about work efforts to do certain things.



If the project is more complex, you would break the work functions down and bring in some of your more experienced staff to help you determine an appropriate estimate.

In our Intranet project example, we will go ahead and estimate the staff resource requirements for the entire project. The resources we need for this project include:

- Project Manager for the entire timeframe of the project who will handle:
 - Project management
 - Application design
- Web programmer for the application development
- QA/Training resource to handle:
 - Application testing
 - User documentation
 - User training
- Network Administrator to set up the domain address and network security

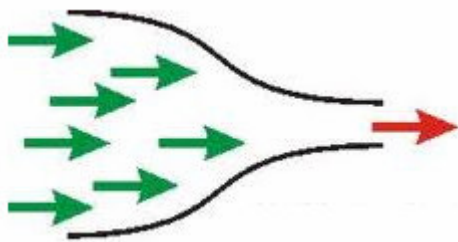
Based on our assumptions of what people can do (i.e., the project manager can also do the application design work), the project needs four people.

When you look at the Intranet project at a high level, the graphic below illustrates what will take place and a rough estimate of when things happen.



Before we proceed, we need to talk about **bottlenecks** and **critical path**. We can use our Intranet example to bring them to light.

The critical path of the Intranet project is that you must define and design the applications before you can program them, , , and you must program the applications before you can train.



A bottleneck is something that prevents you from proceeding further or from going faster. There are several bottlenecks in the timeline graphic above, , , do you see them?

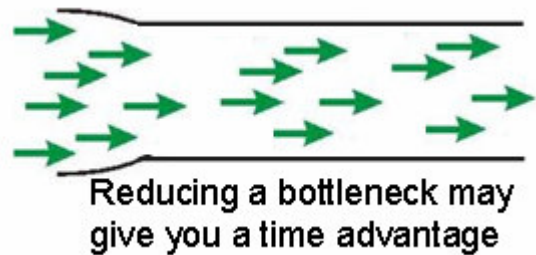
First, you can't go very far until you define and design the applications.

Secondly, the programming effort must be completed before you can finish the project.

Third, the application won't work until you have the domain setup completed.

Learning how to identify bottlenecks and coming up with options to eliminate them or minimize their impact becomes a very important trait in managing projects. With our simple project here, there are three bottlenecks:

1. Application design
2. Programming
3. Domain setup



When you eliminate a bottleneck it often gives you a time advantage and allows the project to be completed faster. A few examples of what could be done in our project are:

1. Start programming as soon as the first application design is completed
2. Add more programmer resources to complete the programming task faster. In our Intranet project, several programmers can work on separate applications to complete the job in half the time one programmer would take.

The reason I bring this out is not to make you think you should always try to deliver every project as quickly as possible. What you really need to know is that most projects, even a simple one like this one, will have key points in the schedule that can cause a delay or potentially be used to speed up your project.

Let me repeat, , , eliminating a project bottleneck can often give you a time advantage.

Once you lose an opportunity to gain time, you lose it forever!

Let's put a "stake in the ground" on the staff resources we need for the Intranet project. A reasonable assumption based on years of experience would suggest the following:

- Network Administrator – 2 days
- Programmer – 9 weeks (1 week for Company News, 1 week for Employee Locator, 3 weeks each for the two department applications and 1 week for training on new software development tools)
- Project Manager/Designer – 25% of a person for the entire project (12 weeks)
- QA/Trainer – 4 weeks

We identified what type of resource is needed, how much of their time and how long they are needed, , , everything you need to budget their cost and map out a timeline.

I just slipped in an assumption in the list of resource efforts above. I put in 1 week for training on new software development tools for the programmer. In our project example, I'm going to assume you do not have a programmer who has developed a web application and you do not have software to develop web applications.

I am doing this only to make a couple of points you will see when we get to the parts of developing the project schedule and budgeting.

B. Equipment and cost related items

This section includes all items that have a cost associated with the project other than the staff we just worked through. Examples of cost items are:

- Computer equipment
- Other equipment
- Software purchase or license
- Facility costs
- Office supplies
- Outside contract work
- Travel



You need this information so you can develop a project budget.

Your company's approach to approving projects will define the extent of detail you need to include in your budget. Some companies are loose with this while others want a more precise estimate. Just remember, , , you are developing a cost *estimate*.

In the Intranet example, the following equipment and cost related items will be required:

- Web site development software
- 1-week training class on web development

We are going to assume a network server is available to host the Intranet web site application your team will develop. We will also assume that all documentation and training materials will utilize current tools available to the staff.

No travel or extra materials are needed to develop or implement the application.

As you can see, minimal expense is really needed to complete this project.

C. Other

In this section, include other department resources you need to design, test, or implement the project. You might also want to include the use of certain equipment or facility resources needed for the project. The main issue here is that you are going to identify resources that do not have a true cost associated with the project.

In our example, we will need the following resource help:

- Human Resource department resource to define the H/R section and to provide the H/R Employee Handbook and other H/R materials
- Operations department resource to define the Operations section and to provide the Operations Policies and Procedure materials
- CEO's administrative assistant to help define the Company News section

Time to summarize the resources we need for the Intranet project:

Project Plan

Intranet project - Resource requirements

A. Staff

- Network Administrator – 2 days
- Programmer – 9 weeks (1 week for Company News, 1 week for Employee Locator, 3 weeks each for the two department applications and 1 week for training on new software development tools)
- Project Manager/Designer – 25% of a person for the entire project (12 weeks)
- QA/Trainer – 4 weeks

B. Equipment and cost related items

- Web site development software
- 1-week training class on web development

C. Other

- Human Resource department resource to define the H/R section and to provide the H/R Employee Handbook and other H/R materials
- Operations department resource to define the Operations section and to provide the Operations Policies and Procedure materials
- CEO's administrative assistant to help define the Company News section

OK, you now have everything you need to develop a project budget.

Let me make a point about what we did in defining resource needs. We estimated the effort for the work based upon our experience in doing these things. In a bigger project, it won't be as simple.

In a larger project, you would develop a schedule by listing all the tasks that are required. The definition of what has to take place and how much time each task takes then defines your resource requirements. We took a more direct line approach in our simple Intranet project, , , I hope you see the difference.

If not, pay close attention when we get to the project schedule section to develop the actual project timeline.



VI. Develop a Budget

The previous chapter defined the resource needs of the project. It's now time to put a financial business case together so we understand the costs and return on investment.

The minimum you need to do is to develop a budget. I recommend you take it a step further and develop a return on investment (ROI).

Most companies look at three things when they evaluate the merits of a project:

1. Total expense
2. Timing of the cash outlay
3. ROI or benefits of the project

Let's go the whole 9 yards and develop an ROI for the Intranet project.

As we determined earlier, there are three types of costs expected in your small Intranet project – staff resources, software training, and a software purchase.

The first step is to create a budget. Let's summarize the expenses we identified:

- There are 4 staff resources needed as follows:
 - A. Project Manager/Application Designer (25% over 12 weeks)
 - B. Network Administrator (2 days)
 - C. QA resource and trainer (4 weeks)
 - D. Programmer (9 weeks)
- We have to purchase Web development software
- We plan to send the programmer to a 1-week web development class

The cost is budgeted as follows:

Item	Monthly Rate	Month 1	Month 2	Month 3	Total
Project Manager (25%)	7666	1916	1916	1916	5748
Network Admin. (2 days)	5750	575			575
QA / Trainer (4 weeks)	3833	0	0	3833	3833
Programmer (9 weeks)	6700	5025	6700	3350	15075
Web development software		300			300
Web development class		550			550
Total		8366	8616	9099	26081

You notice the cost for the project manager is 25% of his monthly salary rate. Two days of the network administrator comes to \$575, etc.

The total project cost is \$26,081 and it will take three months.

With the exercise you have developed two of the three things senior managers usually want, “How much do we spend and when do we spend the money?”. Now it is time to develop an idea of the cost savings.

There are two types of savings a company can benefit from by implementing a project:

1. Cost elimination or reduction
2. Cost avoidance



Another financial consideration is to include additional sales expected as a result of implementing a project. In our Intranet sample there are no additional sales benefits.

Other benefits are worth considering when you list the benefits of a project. They might not have financial ROI implications but they are a benefit to the company nonetheless. Things like, , ,

- Competitive advantages
- Company uniqueness (especially items that differentiate the company)
- Client satisfaction features
- Addressing regulatory issues

For the Intranet project we will assume the following cost savings will be achieved based upon what we were told about the history of expenditures in each area.

- Eliminate production & distribution of Employee handbook - \$ 850 per month.
- Eliminate production & distribution of Operations Policy & Procedures manuals - \$1500 per month
- Reduce the cost of company news production and distribution - \$ 700 per month

We will assume no savings are achieved until the entire project is completed, or beginning in Month-4.

Plot the savings in your budget spreadsheet.

Savings Item	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10
Employee Handbook	850	850	850	850	850	850	850
Operations Policy & Procedures	1500	1500	1500	1500	1500	1500	1500
Company News	700	700	700	700	700	700	700
Total Savings	3050	3050	3050	3050	3050	3050	3050

Put the entire spreadsheet together. You will use it later with the project plan document you develop. A complete ROI spreadsheet of our Intranet project is included below:

Project Plan		Intranet Project - Budget & ROI										
ITEM	M-1	M-2	M-3	M-4	M-5	M-6	M-7	M-8	M-9	M-10	M-11	M-12
Project Mgr (25%)	1916	1916	1916									
Network Adm	575											
QA / Trainer	0	0	3833									
Programmer	5025	6700	3350									
Web develop. SW	300											
Web develop. class	550											
Total Expense	8366	8616	9099	0	0	0	0	0	0	0	0	0
Empl. Handbook				850	850	850	850	850	850	850	850	850
Operations P&P				1500	1500	1500	1500	1500	1500	1500	1500	1500
Company News				700	700	700	700	700	700	700	700	700
Total Savings	0	0	0	3050	3050	3050	3050	3050	3050	3050	3050	3050
Investment Balance	8366	16982	26081	23031	19981	16931	13881	10831	7781	4731	1681	0

The payback period or ROI for the Intranet project is 12 months, , , it takes 12 total months to develop the project and recover the costs with cost savings after the project is completed.

Some would like to look at this as a 9-month ROI, , , or the time it actually takes to recover the cost once the project is finished. I prefer to call it a 12-month ROI and include the entire time from the beginning of the project work until the time you recoup the costs.

Another thing about budgeting staff expenses. Your internal staff resources are already included in your IT Operating Budget. I recommend you include the equivalent salary amount for existing resources on a project to show the full cost of the project. If they are not working on this project they could be doing something else or you would have to pay for outside resources. It's important to look at a project's full cost.

You now have the third component senior managers want to see, , , the length of time it takes to pay for the project.

VII. Develop the Project Schedule

Developing a project schedule can be simple as in the case of our working Intranet application example. It can also be quite intricate with several projects all tied in together within a master project plan.

When developing a project schedule you want to be as detailed as needed to ensure all tasks are identified with enough time to complete them timely and in a quality manner.

It is the Project Manager's responsibility to identify all the key issues and to develop a schedule that can be understood by all the project team members. The documented project schedule is the key ingredient in completing a project on time.

A well developed project schedule will include:

- Tasks
- Responsibilities
- Completion timeframes

Later, I will give you a project schedule I used to manage several technology conversion projects resulting from a large company acquisition. After we step through the project planning basics of a simple project like our Intranet application project, you will be able to look at a larger project to reinforce the concepts we discuss in this publication.



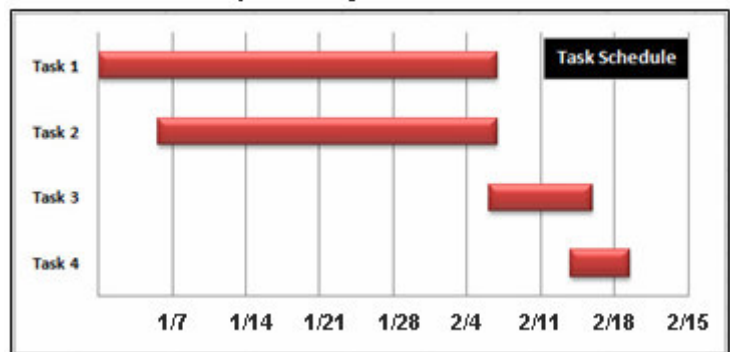
As you begin thinking about listing the tasks required to execute a project it helps to organize them into logical groups and to create a visual plan that can be followed easily.

To help you in this process we will break the project schedule discussion into 6 parts:

- A. Major Project Sections
- B. Tasks
- C. Responsibilities
- D. Prerequisites
- E. Critical Bottlenecks
- F. Timeframes

Each part is an important aspect in the project manager's role of communicating the plan and reinforcing key points that help keep the project on track.

Sample Project Scheule



A. Major Project Sections

What you are ultimately going to do is to list every task that has to be completed to successfully deliver your project. It is going to be a big benefit if you organize the tasks into work group categories.

To begin, step back and identify the major functional areas, or categories of tasks that are required for the Intranet project.

You have actually already done this. Remember back to the section where we identified the staff required for the project? In that section, we essentially defined the work required to determine the type of staff resources we needed.

If this were a large complex project, you would have worked on defining the tasks first in order to define the work required, , , and you might have needed to spend a good bit of time or gotten some help to develop the tasks. In our Intranet project, it was simpler.

Let's summarize the major work groups a bit more. The major groups of tasks for our Intranet project include:

- Application design
- Infrastructure
- Programming
- Testing and training

You should keep the task groups fairly broad. These categories are more than ample to list all the tasks necessary to complete the Intranet project.

Before we focus on defining the specific tasks to complete the Intranet project, I want to introduce you to a very old but effective tool I've used to manage projects.

It's a Project Schedule template.

In my IBM days, they gave us a forms pad with forms that looked similar to what you see here. When the spreadsheet came about, I created a template I could use for scheduling my projects.

While I'm fluent with many project management tools like Microsoft Project, I always use this tool if I have an option to choose, , , it is simply quicker and easier to use.

A blank template is in the Appendix.

MDE Enterprises, Inc.							Page 1				
8/23/11											
Project:							Month-1	Month-2	Month-3	Month-4	Month-5
Proj. Mgr.:											
ACTIVITY						Resp.					
REMARKS:											

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Project Schedule Template

MDE Enterprises, Inc. Page 1

8/23/11

Project: _____ (A)

Proj. Mgr.: _____

		Month-1	Month-2 (D)	Month-3	Month-4 (E)	Month-5
	ACTIVITY	Resp.				
1	(B)					
2						
3						
4						
5						
6						
7						
8				(F)		
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						

REMARKS:

(G) _____

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There are seven parts to the template:

- A. Project name and project manager
- B. Tasks to be completed
- C. Task responsibility (I usually use first name and last name initials)
- D. Month
- E. Week dates (I prefer to use Friday dates, , , five columns in case of 5 weeks)
- F. Cells to indicate task activity or completion week
- G. Remarks (I usually include team member initials and full name for reference)

We will discuss each section of the template in more detail as we develop the project schedule for your Intranet project.

While we are still in the **Major project section**, I'll show you what I do to get started in developing a project schedule.

First, you want to create a master work template for your Intranet project so make a copy of the blank template spreadsheet and name it **Company Intranet Project**.

Add the **Project Name** and the **Project Manager Name** to the newly created Intranet Project schedule template in **Area-A**.

Next, put the **Months** in the month sections – **Area-D** and the **Friday date** for each week under the appropriate month – **Area-E**. You will have either four or five Friday dates depending upon the number of weeks in each month.

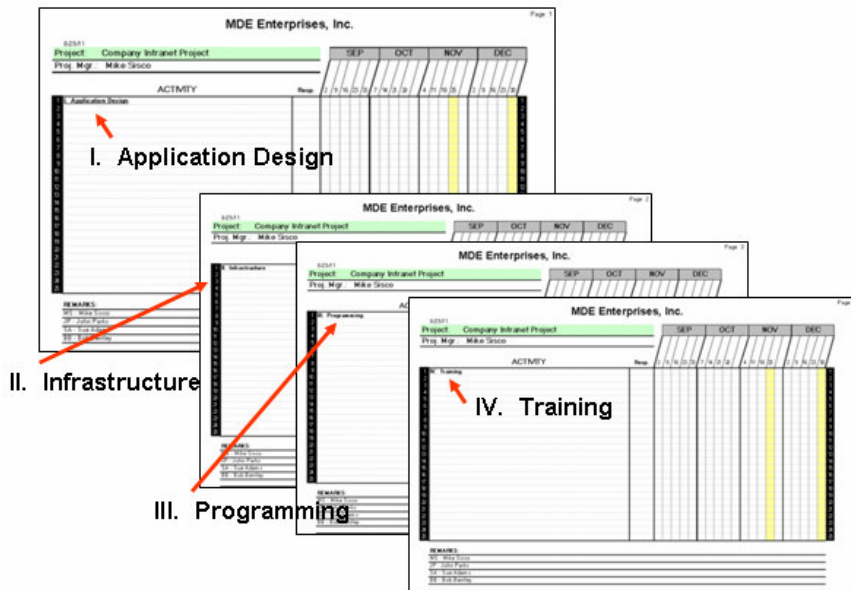
Next, put in the **Remarks** section (**Area-G**) a list of the team members who will be working on the project. Use “MS – Mike Sisco”, for example.

Then, copy the spreadsheet cells and add new “duplicate pages” to the end of the updated template, , , you have four major project sections in the work you will do for the Intranet project so I would probably add three or four pages to the template.

Now you are ready to start adding the substance of the project schedule.

In the top Activity Row of Area-B for each page, type in the major work section you have identified for the Intranet project.

- On page-1 you will type in **I. Application Design**
- On page-2 you will type in **II. Infrastructure**
- On page-3 you will type in **III. Programming**
- On page-4 you will type in **IV. Training**



When you get the templates set up similar to what we have to the left you are ready to start filling in the tasks.

I want to point out a couple of things on the next page with a larger version of Page 1.

A few things you should notice:

Project Plan

		MDE Enterprises, Inc.																				Page 1
8/29/11																						
Project: Company Intranet Project		SEP					OCT					NOV					DEC					
Proj. Mgr.: Mike Sisco																						
ACTIVITY		Resp.	2	9	16	23	30	7	14	21	28	4	11	18	25	2	9	16	23	30		
1	I. Application Design																				1	
2																					2	
3																					3	
4																					4	
5																					5	
6																					6	
7																					7	
8																					8	
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24																					24	
25																					25	

REMARKS:
 MS - Mike Sisco
 JP - John Parks
 SA - Sue Adams
 BB - Bob Bentley



First, notice there are two months that have five weeks, , , September and December. There are five Fridays in each of these months.

Second, there are two weekly columns of cells highlighted in yellow. I did this to let the team members know these are short work weeks due to US holidays, , , Thanksgiving and Christmas.

And finally, the legend in the remarks just lets anyone who looks at the project schedule know who the project team members are in case they are interested in the status of a task.

We will add the tasks and responsibilities next.



B. Tasks

Identify tasks for each of the major work groups and add them to the Activity section.

I. Application Design

- A. Define Requirements – Company News
- B. Define Requirements – Human Resources
- C. Define Requirements – Operations
- D. Define Requirements – Employee Locator
- E. Design Application – Company News
- F. Design Application – Human Resources
- G. Design Application – Operations
- H. Design Application – Employee Locator
- I. Gain Approval – Company News
- J. Gain Approval – Human Resources
- K. Gain Approval – Operations
- L. Gain Approval – Employee Locator

II. Infrastructure

- A. Set up Intranet domain area and IP address on network server
- B. Verify security level to prevent unauthorized access

III. Programming

- A Purchase web development software
- B Install web development software
- C Attend web development training class
- D-1 Program Company News
- D-2 IT test of Company News
- D-3 User test of Company News
- E-1 Program HR application
- E-2 IT test of HR application
- E-3 User test of HR application
- F-1 Program Operations application
- F-2 IT test of Operations application
- F-3 User test of Operations application
- G-1 Program Employee Locator application
- G-2 IT test of Employee Locator application
- G-3 User test of Employee Locator application
- H Install Intranet application code into “live” environment

IV. Training

- A. Document Intranet policy and procedures
- B. Document Company News announcement and User Guide
- C. Document HR application announcement and User Guide
- D. Document Operations announcement and User Guide
- E. Document Employee Locator announcement and User Guide



OK, we have listed all the tasks that are needed for the project. As you see, it is fairly detailed and should be. The important thing is to list every detailed task that is important to complete the project.

The tasks pretty much determine who the responsible team member should be simply because of the nature of work. **Always focus on the tasks**, , , that's what you need to be sure you do a thorough job on, , , the tasks are key.

Hopefully you see the benefit of putting similar work tasks like the Programming tasks together. It helps organize the project schedule and when you conduct status meetings it will make it easier for you to focus on work group activities with your team.



On a project like the Intranet project, I would put the project task list together myself and have the team review the project schedule for accuracy and appropriate scheduling in the Project Kickoff Meeting, , , to be discussed later.

For a more complex project or for a project in an area where you have limited expertise, you should assemble a small team to develop the tasks. You will want to keep a work session of this nature as small as you can in order to complete the work productively.

Again, you will have the entire project team review the tasks and proposed schedule to approve or modify as needed in a Project Kickoff Meeting.

Put your Intranet project tasks on the project schedule spreadsheet in the major work group categories identified earlier.

Next, you will need to assign responsibility and task completion dates.



C. Responsibilities

Every task needs an owner.

Identify the most appropriate member of the project team to assign responsibility for each task.

One tip here is that **you want a small project team, , as small as possible**. Limit participation to key people, , , the reason, it is much easier to manage a small team than a large one.

Assign responsibility for each task to someone on the project team. This doesn't mean the individual assigned the responsibility has to actually do the work. It simply means the assigned person is accountable to the project team to ensure the task is completed and to report the status in the project status meetings.

Another tip is you want **only one person responsible for each task**. If two or more people have shared responsibility it is too difficult to manage and to hold people accountable, , , it makes it too easy for people to look to the other person as the reason a task does not get completed on time.

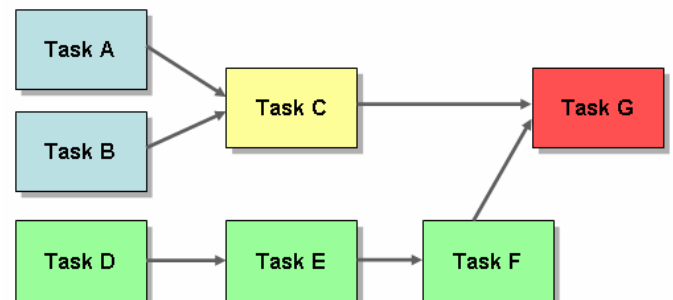
Put the team member's initials in the Resp. column of the spreadsheet for each task.

D. Prerequisites

As you develop your list of tasks, certain tasks have to be completed before others can start. In our example, the web development software training has to take place prior to the programming. Similarly, the programmer can't really program anything until an application is designed.

One of the reasons we listed the definition and design of each application component separately is that design work for some of the applications can take place as the programmer is programming an application already designed. Good project managers take advantage of overlapping opportunities as much as possible.

Developing a sense for the prerequisites for each task will help you determine the best completion timeframe for each task and where you will be able to overlap certain tasks. The goal is to complete the project predictably and in a quality manner.



In the sample to the right, tasks A and B have to be completed before you can work on Task C. Tasks C and F have to be completed before you can start Task G. This type of visualization will help you define the task timeframes.

E. Critical Bottlenecks

Bottlenecks either prevent you from moving forward or limit the pace in which you can move forward in a project or process. Generally, project bottlenecks are created by lack of resource availability.

The key issue is to identify the major “blocks” or bottlenecks that exist. Once they are identified, you can strategize with your team on options to eliminate them.

Discussing bottleneck issues with the project team can be very helpful to you. Employees have a great deal of insight, , maybe more than you realize. Take advantage of your resources and use them to help you evaluate alternatives.

When you identify prerequisites and bottlenecks, you can develop timelines around those particular tasks. Knowing where the bottlenecks are and the options available to minimize them gives you information to build a realistic project schedule.

In our Intranet application there are several bottlenecks:

- Purchase the web application development software
- Install the web application software
- Train a programmer on web application development
- Design each of the application modules
- Setup of the domain on the network
- Program the applications



You could identify a few more minor bottlenecks in the project, but these are the key bottlenecks in your Intranet project. Some of these tasks are absolutely required before you can move forward. For example, the programmer can be trained and ready to go, but he can't do any work until you purchase and install the web application software.

In addition, your programmer's availability to attend class and to start working on this project is a potential bottleneck. People availability will impact project scheduling.

Your biggest constraint is the programming function. You have four applications to develop and programming effort is the largest task in your Intranet project. You can reduce this “programming bottleneck” by adding more programmers. The applications are different enough that up to four programmers could tackle the four Intranet applications. This would reduce the project time considerably.

A capable project manager always reviews the project and anticipates the future.

Looking downstream to determine the work required several weeks into the future and identifying what is needed to position resources for the work is extremely important. Planning and anticipating are key skills needed to keep projects on track. Otherwise, you will constantly miss project completion dates.

When you identify a bottleneck, it helps to highlight it in your project schedule.

Highlighting the bottleneck communicates to everyone how important this task is in being able to complete the project on time. Miss the completion date for this task and it has a ripple effect downstream for other tasks in your project schedule.

For example, if your programmer is not available for training when the web application class is scheduled, it may be another month before your programmer can go to the class. If this class is an absolute requirement, , , it postpones the start of the programming work and can affect the project completion date, the cost, , , or both.



I like to highlight the background of task timeframe cells that are bottlenecks so they are easy to recognize. I'll show you this in a minute.

Bottlenecks are often key milestones that need to be met in order for the project to be completed as planned.

Let me give you another example. Assume your company is going to open a new office, , , let's say in Chicago. The key IT support task to open a new office is to create connectivity for the new office staff to access our systems, for e-mail, etc. Getting network connectivity in place is a critical bottleneck to open the new Chicago office.

Until we have connectivity, the new office cannot operate, , , no business applications and other technology services will be available for people to do their jobs.

Knowing we have to have connectivity in place to move forward, I'll give the person responsible for this task direction and encouragement to get the task completed well before the due date. If we can eliminate this key bottleneck, it may give the Chicago office manager options to do some things faster like hiring a few people, etc.

When you conduct a project status meeting, you want to ask about the status of this task every week, , , long before it has to be completed. Create a sense of urgency to complete this task early because it is the one task that can jeopardize meeting your project completion date.



F. Timeframes

Let's see, you have defined the tasks, you know the availability of your employee resources, you know the prerequisites to each task, and you have determined the major bottlenecks that exist in the project schedule.

You now have all the information needed to assign a completion date for each task.

I recommend you develop a project schedule draft on your own first, , , or with a very small team. Then, sit down with the project team in a Project Kickoff Meeting to verify completeness and feasibility of the task timeframes you have indicated.



Normally, there will be some slight “tweaking” to do, but the more you manage projects, the less change you will find.

An approach to developing task completion timeframes that works well is to assign week ending dates, typically the Friday of each week. In this way, you can review easily what is on track by week and what is due weeks in advance.

Assigning exact dates is not as important as assuring that the completion date occurs in a certain work week. Every work week will have key milestones necessary for the project to complete on time.

One comment about timeframes. **I believe it is usually preferable to implement the project in a quality manner than to shortcut critical issues to meet a delivery date.**

Generally, missing a date has less implication to the success of a project than the quality of executing the tasks. Part of a Project Manager’s role is to make decisions that protect the integrity of the project so it meets the needs of the client.

Earlier, you listed every task required to complete the Intranet project. Now it is time to define the completion date for each task.

What I do is put a “/” (a slash) in the cell I believe the task should be completed by. Let me show you:

			Sep.				
			2	9	16	23	30
		ACTIVITY	Resp.				
1	I. Application Design						
2	A-1 Define requirements - Company News	MS	/				
3	A-2 Design Company News application	MS		/			
4	A-3 Gain design approval for Company News	MS		/			

The first task is due to be completed the week of September 2nd , , , the next two tasks by September 9th.

Using the spreadsheet template gives you a visual picture of the project. It is very easy to see what and when things need to be completed by and what has been completed. This makes it very easy to work through the tasks of a large project in a project status meeting and do it productively, , even if the project has 500 tasks.

Take a look at a section of the first page of the Intranet project.

9/1/11		SEP					OCT				
Project: Company Intranet Project											
Proj. Mgr.: Mike Sisco											
ACTIVITY		Resp.	2	9	16	23	30	7	14	21	28
1	I. Application Design										
2	A-1 Define requirements - Company News	MS	/								
3	A-2 Design Company News application	MS	/								
4	A-3 Gain design approval for Company News	MS	/								
5	B-1. Define requirements - Human Resources application	MS	/								
6	B-2 Design Human Resources application	MS	/								
7	B-3 Gain design approval for Human Resources application	MS	/								
8	C-1 Define requirements - Operations application	MS	/								
9	C-2 Design Operations application	MS	/								
10	C-3 Gain design approval for Operations application	MS	/								
11	D-1 Define requirements - Employee Locator application	MS	/								
12	D-2 Design Employee Locator	MS	/								
13	D-3 Gain design approval for Employee Locator application	MS	/								
14											
15											
16											
17											
18	II. Infrastructure										
19	A. Create domain on company network	BB		/				/			
20	B. Setup and validate Intranet systems access security	BB						/			
21											
22											
23											
24											
25											

Two of the four major categories and all the tasks for each group are included on this first page. Every task has a completion date represented by the “/” in the week ending columns.

Also note that I leave several blank rows at the end of every major category section. I do this in case we identify additional tasks that need to be added to the project during the project kickoff meeting. Makes it easier.

You see task II-A completion date cell is highlighted because it is a bottleneck.

When a task is completed you will change the slash (“/”) to an “X”. It provides an easy way to visualize the status of the project at a glance and to work through a project status meeting quickly.

VIII. Document the Plan

You have bits and pieces of the project scattered all over your desk and in your mind. It's now time to put the plan on paper. Documenting the plan does several things:

- Forces you to think through all aspects of the project
- Puts a "stake in the ground" on what you are planning to do and how
- Gives you a communication vehicle to set and manage expectations
- Provides a project schedule to monitor and manage the project.

An effective project plan document includes six significant items:

- A. Goals and Objectives
- B. Deliverables
- C. Resources
- D. Budget
- E. Assumptions
- F. Project Schedule

Many managers believe creating a project plan to this extent is a waste of time. In some cases, they are probably right. Small, informal projects don't need a formal plan.

Larger projects that are more extensive and require close management of timelines and expectations need a formal project plan. Gauge whether you need a documented project plan based upon size, complexity, personality of your client, etc.

Sidebar: If you plan to charge an external client for your work, you should always document a project plan so everyone is clear about what you will deliver, timeframes and cost. It will save you time and hassle in the long run.

The bottom line, , , it is harder to get burned when you have a documented project plan and your client has agreed to it. When in doubt, document the plan and include all six components.

In our Intranet application example, we have done most of the work already; we just haven't pulled it all together into a nice, neat package.

The following pages provide an example of a documented project plan for your Intranet project.



An internal Intranet application is a fundamental need of our company to provide a communication vehicle for our employees. With the expected growth of the company, we will use the Intranet to share company news and provide company department information repositories for our employees.

A. Goals and Objectives

Create a company Intranet solution that provides an employee communication vehicle for company news and access to key resources from the Human Resources and Operations departments.

Benefits are to eliminate the cost of producing and distributing the company newsletter, employee manuals, and operations policy and procedure manuals by making them available online.

B. Deliverables

1. Develop a secure (employee access only) company intranet application that will be made available to all employees having access to the company network.
2. Functional features will include:
 - A. *Company News*** section to be maintained and updated by the CEO administrative assistant on a weekly basis.
 - B. *Human Resources*** section to include:
 - 1) Employee Manual
 - 2) HR announcements maintained by the HR staff
 - C. *Operations*** section to include:
 - 1) Operating Policy and Procedures Manual
 - 2) Operations announcements
 - D. *Employee Locator Directory*** built to be employee maintained.

C. Resources

Resource requirements are:

Staff:

- Network Administrator – 2 days
- Programmer – 9 weeks
- Project Manager/Designer – 25% of a PM for the entire project (12 weeks)
- QA/Trainer – 4 weeks

Other Resources:

- Web site development software
- 1-week training class on web development

D. Budget and ROI

The Intranet Application Project as defined requires an investment of \$26,081 and has a ROI payback of 12 months.

ITEM	M-1	M-2	M-3	M-4	M-5	M-6	M-7	M-8	M-9	M-10	M-11	M-12
Project Mgr (25%)	1916	1916	1916									
Network Adm	575											
QA / Trainer	0	0	3833									
Programmer	5025	6700	3350									
Web develop. SW	300											
Web develop. class	550											
Total Expense	8366	8616	9099	0	0	0	0	0	0	0	0	0
Empl. Handbook				850	850	850	850	850	850	850	850	850
Operations P&P				1500	1500	1500	1500	1500	1500	1500	1500	1500
Company News				700	700	700	700	700	700	700	700	700
Total Savings	0	0	0	3050	3050	3050	3050	3050	3050	3050	3050	3050
Investment Balance	8366	16982	26081	23031	19981	16931	13881	10831	7781	4731	1681	0

E. Assumptions

1. Sufficient network capacity and capability exists.
2. Department managers available to define requirements of each module.
3. Staff resources available as needed effective 9/5/11.

F. Project Schedule

The project schedule that follows identifies all tasks, responsibility and due dates to complete the project in three months.

Company Intranet Project Schedule

MDE Enterprises, Inc.

9/1/11

Project: Company Intranet Project
Proj. Mgr.: Mike Sisco

ACTIVITY	Resp.	SEP					OCT				NOV				DEC				
		2	9	16	23	30	7	14	21	28	4	11	18	25	2	9	16	23	30
I. Application Design																			
2 A-1 Define requirements - Company News	MS	/																	
3 A-2 Design Company News application	MS	/																	
4 A-3 Gain design approval for Company News	MS	/																	
5 B-1 Define requirements - Human Resources application	MS	/																	
6 B-2 Design Human Resources application	MS	/																	
7 B-3 Gain design approval for Human Resources application	MS	/																	
8 C-1 Define requirements - Operations application	MS	/																	
9 C-2 Design Operations application	MS	/																	
10 C-3 Gain design approval for Operations application	MS	/																	
11 D-1 Define requirements - Employee Locator application	MS	/																	
12 D-2 Design Employee Locator	MS	/																	
13 D-3 Gain design approval for Employee Locator application	MS	/																	
14																			
15																			
16																			
17																			
18 II. Infrastructure																			
19 A. Create domain on company network	BB		/																
20 B. Setup and validate Intranet systems access security	BB					/													
21																			
22																			
23																			
24																			
25																			

REMARKS:

MS - Mike Sisco
 JP - John Parks
 SA - Sue Adams
 BB - Bob Bentley



MDE Enterprises, Inc.

9/1/11

Project: Company Intranet Project
Proj. Mgr.: Mike Sisco

ACTIVITY	Resp.	SEP					OCT				NOV				DEC				
		2	9	16	23	30	7	14	21	28	4	11	18	25	2	9	16	23	30
III. Programming																			
2 A. Purchase web application development software	MS	/																	
3 B. Install web application software	BB		/																
4 C. Attend web development training class	JP		/																
5 D-1 Program Company News application	JP		/																
6 D-2 IT test - Company News	SA			/															
7 D-3 User test - Company news	CEO Admin			/															
8 E-1 Program Human Resources application	JP			/		/													
9 E-2 IT test - Human Resources	SA			/		/													
10 E-3 User test - Human resources	HR Mgr			/		/													
11 F-1 Program Operations application	JP			/		/													
12 F-2 IT test - Operations	SA			/		/													
13 F-3 User test - Operations	Ops Mgr.			/		/													
14 G-1 Program Employee Locator application	JP			/		/													
15 G-2 IT test - Employee Locator	SA			/		/													
16 G-3 User test - Employee Locator	SA			/		/													
17 H. Install Intranet application code into "live" environment	JP			/		/													
18																			
19																			
20																			
21																			
22																			
23																			
24																			
25																			

MDE Enterprises, Inc.

9/1/11

Project: Company Intranet Project
Proj. Mgr.: Mike Sisco

		SEP				OCT				NOV				DEC					
ACTIVITY		2	9	16	23	30	7	14	21	28	4	11	18	25	2	9	16	23	30
1	IV. Training																		
2	A. Document Company Intranet Policy & Procedures				/														
3	B. Develop Company Intranet announcement			/															
4	C. Document Employee News User Guide					/													
5	D. Document Human Resources application User Guide						/												
6	E. Document Operations application User Guide									/									
7	F. Document Employee Locator User Guide									/									
8	G. Distribute Company Intranet announcement, P&P and User Guide												/						
9																			
10																			
11																			
12																			
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25																			



OK, you have a project plan document describing what will be delivered, how much it will cost, and when it will be delivered. Excellent!

Before we leave this section, notice a couple of things in the Intranet project schedule.

- Each of the key bottleneck task completion date cells are highlighted.
- I shaded the first week of December in green to highlight the “go live” date.
- A couple of programming tasks take three weeks to complete, , , I show the weeks the work will be done by connecting cells. See circled dates below.
- The CEO Administrative Assistant will do the User test, , , D-3. She is not part of the project team but we will need her help and two others to test the apps.

ACTMITY		Resp.	2	9	16	23	30	7	14	21	28	4	11	18	25	2
1	III. Programming															
2	A. Purchase web application development software	MS	/													
3	B. Install web application software	BB		/												
4	C. Attend web development training class	JP		/												
5	D-1 Program Company News application	JP			/											
6	D-2 IT test - Company News	SA				/										
7	D-3 User test - Company news	CEO Admin					/									
8	E-1 Program Human Resources application	JP					/	/	/							
9	E-2 IT test - Human Resources	SA						/								
10	E-3 User test - Human resources	HR Mgr							/							
11	F-1 Program Operations application	JP							/	/	/					
12	F-2 IT test - Operations	SA										/				
13	F-3 User test - Operations	Ops Mgr.											/			

IX. Project Meetings

Meetings, meetings, meetings, , , everyone hates meetings. Yes, it is true to a certain extent. However, meeting time is going to be required to manage a project effectively.

There are few substitutes to being able to interact with your client and project team members directly.

This doesn't mean it has to be face to face, , , many project team members are quite often in different cities so it isn't feasible to have everyone in the same room.

With today's virtual meeting and conferencing technology, it is easy to conduct virtual meetings, , , and it is also economical. Much better than in the "old days"

The key is you need to hold a structured meeting to get everyone on the project team involved so they get on the same page and you keep them focused in delivering your project on time and in a quality manner.

Personal Note: I have led many large projects that included project team members from several different cities. Each team member was an integral part of the project team, but there was no way to have a face to face meeting.

In many situations there might be only one or two people on the team who have actually met all the other project team members.

Every project meeting was held via conference call or in an Internet meeting space. Virtual meetings work very well as long as you have supporting material and approach it in an organized manner.

There are essentially three types of meetings a project manager will need to conduct:

- A. Project Kickoff
- B. Project Status meetings
- C. Sidebar focus meetings

Each of these meetings has a different purpose we will discuss. A project manager needs to know when and how to conduct meetings to reinforce key aspects of the project and to keep it on track.



A. Project Kickoff

The Kickoff Meeting is a very important part of the project. It sets the stage and tone for the project, , , and gives the project manager the opportunity to get everyone on the same page.

A Project Kickoff Meeting also allows you to set expectations of how you plan to run the project and what you expect of the team when they come to a Project Status Meeting.

Sidebar: It is very possible some of the project team members have never worked on a real project before. If this is the case, you need to use the Project Kickoff Meeting to explain several things to the team:

- Importance of coming to a Project Status Meeting on time and prepared with their tasks completed on time
- Don't wait until the last minute to start working on your project tasks, , , be proactive in starting the work to complete your tasks early if possible
- Asking questions or asking for help is a sign of strength, not weakness. Ask early enough and we have options to help you without negatively impacting the project, , , ask too late and it can jeopardize the project

To prepare for a Kickoff Meeting, there are a few things you will need to do:

A. Schedule a time when all project members can participate. Everyone needs to hear the same message as you launch the project.

B. Develop an agenda:

- 1) Project description
- 2) Purpose
- 3) Goals and objectives
- 4) Project deliverables
- 5) Project team introductions and roles
- 6) Project assumptions
- 7) Project schedule
- 8) Key success factors
- 9) Status meetings
- 10) Other communication plans
- 11) Question and answer session




C. Send team members a copy of the Project Plan minus the budget. Include:

- Instructions to review the plan and especially the project schedule to validate the tasks, their responsibilities, and dates to complete to be accurate and reasonable.
- Project team contact information
- Conference call number or online meeting link and meeting time.

Use the Kickoff Meeting to confirm the plan tasks and dates with the team. Until you do this, your plan is a draft, , , once they agree to the tasks and completion dates, you will make a formal commitment to the project sponsor to deliver the project as documented.

There are a few items listed in the Kickoff Agenda we have not discussed:

- 
- The Project Manager should introduce each member of the team and explain his/her responsibilities. Don't let team members do this unless you have a small team. IT people are high detail and they will spend time discussing things that aren't needed, , , you have to control the time.
 - Walk through the Project Plan and explain how you will maintain the project schedule spreadsheet for easy status review.
 - List key success factors and explain the importance each team member has to the overall success of the project. Help team members know up front how the project will be measured as a successful project.
 - Discuss what you expect in Status Meetings. Emphasize they all need to be there so put the dates on their calendar.
 - Explain how you plan to use the project schedule document in Status Meetings. Specify the frequency of the meetings, , , I like to meet every Tuesday in the early afternoon because it gives you a few days to follow-up on issues that come up in Status Meetings.
 - Describe your plans for communicating with the project team and others interested in the project.

In the Kickoff Meeting, most of the discussion will be the Project Manager describing the project, assumptions, and schedule. Keep the meeting on topic and create an environment of cooperation and teamwork. When you get everyone looking out for one another throughout the life of the project, you have a good thing going.

When you discuss the Project Schedule part, walk through it line item by line item. You want to verify several things about the project schedule.

- All tasks are included on the schedule that need to be there
- Team members are comfortable with their assigned responsibilities
- Each task can be completed by the scheduled due date

You need to hear an affirmative from the person assigned to each task, , , or a suggestion about how the task needs to be changed.

Now is the time to make schedule changes if needed, so emphasize that when we all agree to the tasks, assigned responsibilities, and delivery dates, , , we walk out of the room signed up to deliver this project as documented.

At the end of the meeting you should summarize the key points and any follow-up items pertinent to launching the project. Provide time for questions and discussion and answer any outstanding questions you identified.

A blank Project Kickoff Meeting template is provided in the Appendix.



B. Project Status Meetings

Schedule project status meetings at regular intervals, , , weekly meetings are recommended. Keeping everyone on the same page is a “proactive” requirement and it requires frequent communication and status checks.

As I said, I like to hold Project Status Meetings on a Monday or Tuesday of each week. When you review the status of tasks due to be completed this week, it gives you a few more days to complete them if you hold the meeting early in the week.

Meeting early in the week helps create a proactive review of sorts, , , if you wait until Friday, the week is essentially over and there is no time to finish tasks due this week.

In our Intranet example, there are only a few team members. To keep a small group such as this notified of the project’s status really doesn’t require a great deal. With today’s technology, it doesn’t take hardly any more effort to communicate with a project team made up of 20 employees or more.

Project status meetings should be held as often as needed to keep everyone on track and to resolve issues that need team participation.

A project is like a herd of sheep, and the project manager is the sheep dog.

OK, let me explain.

Projects don’t get completed on their own!

They get completed because a project manager is constantly pushing the project forward, , , just like a sheep dog pushes sheep down the path.

Project managers must inspect, coach, monitor and review, , , and help to focus people on their tasks to complete the project on time.

In the meeting, check the status of each task due to be completed this week. When you work down the project schedule you also want to ask about key tasks due a few weeks into the future.

Ask about the status of critical bottleneck tasks in every meeting. This gives the person responsible an incentive to get it completed and off the list of to-do’s.

Each Project Status Meeting should follow an agenda. A sample agenda is provided with instructions on the following page.

After each Status Meeting, update the project schedule and send a revised copy to the team along with a summary of any meeting follow-up to-do’s.



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Project Status Meeting

Date: _____

New Information: At the beginning of each status meeting, highlight news or management decisions that impact the project.

Project Status: Go through the project schedule at the task line item level for the tasks to be completed this week. Determine the current status, needs that exist to complete the task, and prognosis for completing the task on time.

You will want to look at critical bottleneck tasks weeks ahead to determine if the tasks will be completed on time. A strong project manager always looks ahead and anticipates the needs of the team.

As you complete a review of each major category of tasks, ask the team if they have identified any additional tasks or issues that need to be addressed for that particular category. For example, there may be additional network issues that are identified as the network administrator verifies the security task.

Create an open discussion environment in the status meetings to allow team members to bring things up that might affect the project.

Team Member Needs: Summarize with each individual any specific items they need in order to accomplish tasks that are coming up. This is an excellent opportunity to help your team members obtain assistance they might need.

Reinforce Bottlenecks and Major Milestones: Take the opportunity often to help the team realize where the critical path and bottleneck items are. Knowing a task is the bottleneck of the project is a major incentive for the person responsible, , , no one wants to be the one to hold up the project.

Question and Answer: After walking through the project schedule status, ask for questions, issues, etc. Keep the meeting net and on topic. Don't waste a lot of resource time talking about issues unrelated to the project.

Summarize: Summarize any sidebar discussions needed, follow-up action items discussed that are critical for the project, and key items expected for the next meeting.

A blank Project status Meeting template is provided in the Appendix.

C. Sidebar Focus Meetings

IT people are problem solvers and they are high detail. It is very common for two or three of your team members to try to solve an issue in the meeting.

I'm sure you have seen it, , , two people take over the meeting by going into a deep technical discussion as they try to solve an issue that comes up in the Status Meeting.



If you have someone on a conference call, they can take control of the phone and ramble on for ten minutes, , , you can't even break in to stop them because they control the phone.

The problem, , , the other people on the team have no idea what they are talking about, , , and it ends up being a waste of their time.

Not a good thing when this happens.

The project manager has to control the meeting. When these things occur, , , and they will, it is time to set up a "sidebar meeting" for the two people to discuss the issue after you conclude today's Status Meeting.

Sidebar meetings can be held immediately after a project status meeting or scheduled later in the week. The important thing is to determine when the entire group benefits from the discussion versus when only a few need to talk about an issue to resolve it.

Project Status meetings aren't intended to be problem solving meetings.

If there are business implications or something that has material impact on the project, the project manager should insure the appropriate people are involved and part of the sidebar meeting.



X. Execute the Plan

You have your project completely defined, budget approved, everything agreed upon, a superstar team, and the Kickoff Meeting could not have gone better.

Smooth sailing ahead, right?

The answer will always be the same, “Only with constant monitoring and management”.

It doesn't matter how small or simple the project is. For it to be successful and to be delivered as expected requires supervision.

**Projects do not happen
on their own!!**

A project is dynamic in that it changes shape and form over time. As you expedite efforts to eliminate one bottleneck, new bottlenecks can be created as a result. Over the course of a large project that takes four months or more, the emphasis areas will change many times.

Sidebar: Here is an example. Let's say you manage an automobile manufacturing plant. In the assembly line there are many steps in the production line to make a car.



Your team identifies a major bottleneck and you determine it limits the number of cars you can produce in a week, , , so you set out to eliminate this bottleneck with an expectation that it will boost your weekly production output from 100 cars to 110 cars.

Your team attacks the bottleneck task aggressively and it costs time and money to eliminate it, , , but they get it done. Everyone is ready to celebrate until they discover the result of this change, , , production dropped to 96 cars. It did not increase output.

Your team goes back to work to determine what has happened and they discover eliminating one bottleneck actually created two more constraints downstream and the result actually decreased production output.

It is also important to know tasks identified in a project are not static, or fixed. As you get into the meat of a project, you may find that a task takes longer than expected.

Other tasks may be simpler and can be completed faster. In some situations, you may be two months into a project before you learn that a critical programming requirement is needed. Issues like this can affect a project significantly.

When you run into obstacles that disrupt calm waters, the important thing is to stay focused and keep pushing forward. For example, a critical item discovered late may require a new project completion date. It is generally more important to address all critical business issues in a quality manner than to simply meet a delivery date.



Experienced project managers build buffer into their project timeframes and budget. They know surprises happen and a surprise is generally not a good thing when it comes to project timelines or project cost.

It is better to anticipate the probability there will be a surprise or two and have room in the plan to accommodate them without adversely affecting the delivery date or cost.

Expect the unexpected!

Anticipate issues coming up and take proactive action to prepare for critical path items. To do this, you have to review the project often and analyze "what if scenarios".



Every week the Project Manager should review the project to identify four very important items as he prepares for the Project Status Meeting:

1. The next several bottlenecks (critical path items) to overcome
2. Tasks at risk for completion on time and whether they affect the project if they aren't completed as scheduled
3. Potential time gain opportunities (eliminating bottlenecks often gains time)
4. Resource assistance options to help complete key tasks on time

Knowing where the immediate bottlenecks are at all times and which tasks are at risk gives a project manager an opportunity at every Status Meeting to discuss options to support members of the team as well as ability to reinforce focus on key areas.

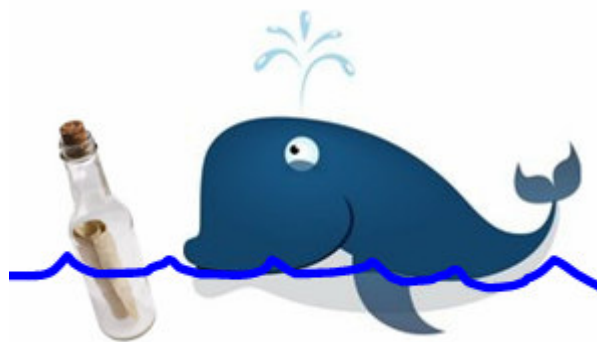


For the most part, developing a solid plan and conducting weekly status meetings will tend to keep a project on track. Anticipating what could go wrong and focusing on the critical path issues will increase your project success odds.

There are several communication vehicles you can use to assist your project communication efforts. The important thing is to fit the communication approach to the audience you are trying to reach.

Communication tools to consider include:

- E-mail updates
- Company Intranet updates
- Memo updates
- Voice mail message updates
- Message in a bottle if it helps you communicate and achieve success



Remember, to execute a successful project plan you must communicate often. Use every approach available that helps you get the message across effectively. Many projects fail because there is not enough communication about the project.

As you manage a project, several traits build credibility and increase success.

- Collaborate with team members on issues and developing solutions.
- Follow-up quickly and consistently.
- Anticipate needs of the project weeks in advance.
- Start meetings on time and keep them “net” and focused.
- Coach and critique team members one on one, not in front of the team.
- Reward positive results and behavior.
- Stay positive and upbeat.

Earlier, I mentioned that the Appendix includes a sample technology conversion project schedule. I have used it many times to convert technologies resulting from company acquisitions. Every technology conversion project has unique requirements, but 80% of the requirements are usually the same.

Personal Note: The project schedule template you have seen in this book is essentially what I started using at IBM to help organize and manage projects many years ago.

I used the installation template IBM gave me to develop a project plan for my first installation, , , a hospital. Upon completing the project I was given another installation project, , , for a construction company in an entirely different industry.

What I realized was every new installation had many of the same requirements. In fact, when I developed the plan for the construction company, over 80% of the tasks were the same as what I had included in my first installation plan for the hospital.

So, I developed a standard installation project template with all the tasks but without the dates. The next time I needed to develop an installation project plan, 80% of the work was already completed. It saved many hours of repetitive work in later installation projects assigned to me.

It was a great tool then and it still works for me today.

The Systems Conversion Plan in the Appendix is unique to a specific project I worked on, but it is a good starting point for you to take a look at. The sample includes actual target dates for the tasks to give you a feel for prerequisites, etc.

I hope it helps.



XI. Track Project Results

One of the things you want to do is track project results and communicate how well your organization is performing. If you do not share this information, I can guarantee you no one will know, , , and that's not good.

A great tool to help you do this is a Project Initiatives Portfolio. It is simple and one of the best tools I've developed to help give an IT organization credibility.

In just one or two pages, you will be able to show senior managers, department managers of the company, and your employees exactly what your IT organization is doing in regards to delivering projects.

The thing that creates credibility for your IT organization is being able to deliver projects successfully. You simply will not be a credible organization if your projects are late, over budget, or do not meet the client's needs.

Lacking credibility means you will not be a successful IT manager.

So, what this says is you have to establish credibility. To do this, you need to demonstrate how well you deliver projects for your company and what they are worth.

Let me introduce the **IT Initiatives Portfolio**.

9/2/11 IT Initiatives Portfolio																		
2008																		
Dept: _____																		
IT Initiative	Responsibility	TIMEFRAME				BUDGET			RESULTS						Meets User Need	My Rating	Comments	
		Planned Time	Actual Time	Variance	On Time	Budgeted Cost	Actual Cost	Variance	6-month Results			12-month Results						
									Forecast	Actual	Variance	Forecast	Actual	Variance				
1																		1
2																		2
3																		3
4																		4
5																		5
6																		6
7																		7
8																		8
9																		9
10																		10
11																		11
12																		12
13																		13
14																		14
15																		15
16																		16
17																		17
18																		18
19																		19
20																		20

It is a bit hard to see so I'm going to break it down into seven sections and explain exactly what to do with this tool.

A project portfolio can do more to show how strong your organization is than anything I know of. Not only that, it can tell others exactly how good you are in key areas:

- Delivering projects on time
- Working within budget
- The value achieved by completing these projects
- How often you meet user needs

It's the best way I know to quantifiably demonstrate your organization's track record.

SUCCESS

Powerful information to share with others!

Let's discuss each section of the IT Initiatives Portfolio.

Section 1 - IT Initiative and Responsibility - List each project and the assigned person responsible for the project, normally the Project Manager. After completing eight to ten projects, you will start seeing a track record of performance develop.

Over time, you should see your performance improve as you begin focusing on the things that are causing your projects to fail.

	IT Initiative	Responsibility
1		
2		
3		
4		
5		
6		

Section 2 - Timeframe - For each project, insert the planned time you think it will take to complete in weeks or months. When you complete the project, add the amount of time it actually takes and determine the variance. If it is shorter than planned, that's a positive variance, , , longer than planned is a negative variance. In the gray column titled **On time**, put in a "Yes" for projects you complete on time or faster than expected, , , put in a "No" for projects that take longer than expected.

You want to see lots of "Yes" indicators in the **On time** column.

----- TIMEFRAME -----			
Planned Time	Actual Time	Variance	On Time

Want to know exactly how good you are in delivering projects on time? Divide the total number of rows that have a "Yes" by the total number of project rows to get a percentage of on time projects. You can even analyze this by project manager to identify who you need to work with in this area if you have a problem.

Section 3 - Budget - For each project, insert the estimated budget to complete the project. When the project is completed, add the actual cost it took to complete the project and calculate a variance between budgeted cost and actual cost. Make anything under budget a positive variance, , , over budget projects have a negative variance. Add a "Yes" to the column titled **Within budget** if the project comes in at or under budget and a "No" if the project exceeds budget. Just as in the Timeframe section, you want to see lots of "Yes" responses in the **Within Budget** column.

----- BUDGET -----			
Budgeted Cost	Actual Cost	Variance	Within Budget

Section 4 - Results - You might not use this section on all projects but probably should for larger projects. I like to look at the benefits achieved for a big project at 6-month and 12-month intervals. The results can be depicted in financial terms or in simple non-financial narrative of the benefits.

Put in the forecasted benefits and then update the project with the actual results in the timeframe you choose to measure results for the project. Calculate the variance. Better results than forecasted should be positive variances and poorer results would be negative variances. Hopefully, you see lots of positive variances.

----- RESULTS -----					
6-month Results			12-month Results		
Forecast	Actual	Variance	Forecast	Actual	Variance

Section 5 - Meets User Need - This is a simple “Yes” or “No” in the shaded column titled Meets User Need. You get the answer to this from the project sponsor upon completing each project. You want to see all “Yes” responses. If you aren’t getting all positives in this area, you need to focus in on the projects to determine what’s going on and decide how to improve the situation.

Meets User Need

Section 6 - My Rating - This column is used to give the project an overall rating. You can do this in one of two ways:

- A. Very literal - If the project is viewed successful in every category (On time, Within budget, Meets forecasted benefits, and Meets user need), it is a Success. If it fails in any category, it is Unsuccessful or Fail.
- B. Subjective - A large project may finish a week or two late but costs less than the planned budget , exceeds the forecasted benefits, and meets user need. The client might view the project as a tremendous success. In a literal view the project would be deemed Unsuccessful. A subjective interpretation might consider the project a Big Success. If you use this method of interpreting project success or failure, be sure the client would agree on the rating you give the project.

My Rating

Section 7 - Comments - Use this to comment on a project or to provide additional information.

Comments	
	1
	2
	3
	4
	5
	6

Capture the information we have discussed on the projects your team works on and it will give you a clear picture about how effective your IT organization is performing, , , and in very specific areas your client will understand.

It's not only important to show your success rates in terms of "on time", "within budget", etc. It is also important to tell your client the value your IT organization is delivering.

If you don't tell them, no one will know, , , GUARANTEED.

This tool can do a lot for you so I highly recommend you maintain an IT Initiatives Portfolio and share the information about the project assets you work on with employees and your clients.

Start tracking your projects and you will quickly begin to understand how well your team performs, , , and exactly where you need to focus improvement so your team achieves maximum credibility throughout your company.

518711		IT Initiatives Portfolio																	
Dept:		2008																	
IT Initiative	Responsibility	TIMEFRAME				BUDGET				RESULTS						Meets User Need	My Rating	Comments	
		Planned Time	Actual Time	Variance	On Time	Budgeted Cost	Actual Cost	Variance	Within Budget	6-month Results			12-month Results						
1	New application rollout	Team	30 days	25 days	5	YES	\$45,000	\$42,075	\$2,925	YES	-	-	-	-	-	-	YES	SUCCESS	
2	Billing automation	Legacy	30 days	32 days	-2	NO	\$78,000	\$78,000	\$0	YES	\$45,000	\$45,000	(\$2,000)	\$40,000	\$45,000	\$5,000	YES	SUCCESS	Later and didn't achieve 6-month results but overall in process
3	California interface	Legacy	45 days	38 days	7	YES	\$40,000	\$40,000	\$0	YES	\$5,000	\$5,000	\$0	\$10,000	\$10,000	\$2,000	YES	SUCCESS	
4	Upgrade O/S	Team	30 days	30 days	0	YES	\$35,000	\$35,000	(\$5,000)	NO	-	-	-	-	-	-	YES	SUCCESS	
5	Virginia interface	Legacy	30 days	45 days	-15	NO	\$40,000	\$45,000	(\$5,000)	NO	\$5,000	\$5,000	(\$2,000)	\$10,000	\$7,000	(\$3,000)	NO	FAIL	
6	Electronics rollout	Legacy	30 days	28 days	2	YES	\$25,000	\$23,000	\$2,000	YES	\$8,000	\$8,000	\$0	\$20,000	\$20,000	\$5,000	YES	SUCCESS	
7																			
8																			
9																			
10																			
11																			
12																			
13																			
14																			
15																			
16																			
17																			
18																			
19																			
20																			
21																			
22																			
23																			
24																			
25																			
Summary																	80.0%	80.0%	

This simple tool can communicate as much about what your IT organization is doing as anything I know of. One page of the last 20 projects shows how effective your team is in delivering projects and the value these projects have for your company.



XII. Summary

Effective project management requires organization, people skills, follow-up, and anticipation of future events and needs. Most can learn how to run projects successfully by following a practical process and using simple tools that work.

As discussed in the previous pages, follow a simple 10-step process and you will position your projects for success:

1. Establish the project goal and objectives
2. Define the project deliverables
3. Quantify resource needs:
 - a. Staff
 - b. Equipment and cost related items
 - c. Other resources
4. Develop a budget with a Return on Investment
5. Develop the project schedule
 - a. Major task groups
 - b. Tasks
 - c. Responsibilities
 - d. Prerequisites
 - e. Bottlenecks
 - f. Timeframes
6. Document the plan
7. Hold a Project Kickoff Meeting
8. Conduct a weekly Project Status Meeting
9. Monitor and proactively manage the plan
10. Track and communicate your results

Follow the practical approach and use the tools I've given you or incorporate another project management methodology of your choosing to manage your projects effectively.

Start delivering your projects successfully and watch your team's credibility grow.

*Best of success,
Mike Sisco, ITBMC*

APPENDIX A Project Schedule - Blank Template

MDE Enterprises, Inc.

8/23/11

Project: _____

Proj. Mgr.: _____

Page 1

		Month 1	Month 2	Month 3	Month 4	Month 5
ACTIVITY	Resp.					
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						

REMARKS:

IT manager tools to achieve more - www.itmanagerinstitute.com

Project Kickoff Meeting - Blank Template

Date: _____ Participants:

Project description:

Purpose:

Goals and Deliverables:

Project member introductions and their roles:

Project assumptions:

Project plan:

Key success factors:

Status meetings:

Other communication plans:

Question and answer session:

APPENDIX C
Project Status Meeting - Blank Template

Date: _____

New Information:

Project Status:

Team Member Needs:

Reinforce Bottlenecks and Major Milestones:

Question and Answer:

Summarize:

APPENDIX D Sample Technology Conversion Plan

This sample conversion plan is provided as an example of a project in mid-stream. The project was in the week ending of October 19th. You can see most of the project tasks prior to this date are checked off as completed.

The column for the week of November 23rd is a 3-day week due to the US holiday Thanksgiving.

The week of December 7 is shaded in gray to highlight the week we “go live” with the converted technology platform.

At the bottom of the first sheet is the project team legend.

MDE Enterprises		Page 1																
10/12/2001		www.mde.net																
Project: USHW FLORIDA Assimilation																		
Proj. Mgr.: Mike Sisco (mike@mde.net; 666-555-1111)																		
ACTIVITY		Resp.	SEP			OCT			NOV			DEC						
		7	14	21	28	5	12	19	26	2	9	16	23	30	7	14	21	28
1	I. Assessment																	
2	A. Assess equipment to determine new equipment needs	PT	X															
3	B. Assess building wiring for compatibility & cable drops needed- all locations	PT	X															
4	C. Assess building telecom setup to determine needs	PT	X															
5	D. Determine required forms needed	JM	X															
6	E. Identify ability to convert LD contract to Qwest	WM									/							
7	F. Identify all user-ID and functionality requirements	MM																
8	G. Identify "bld system" need and location for ongoing inquiry after "go live"	PT,CP				X		/										
9	H. Determine Medicare work approach after migration to AS/400	JM																
10	I. Obtain e-mail address needs for Atlanta RBO	MM						X										
11	J. Determine ability to enlist qualified resource to conduct training in FL/West	JM						/										
12	II. Ordering																	
13	A. Order cabling for dinics	PT				X												
14	B. Order additional desktop & printer equipment	PT,MM					X											
15	C. Order WAN lines from Qwest	PT	X															
16	D. Order WAN equipment from IE	PT					X											
17	E. Order M/S Office Pro for E-Mail, WORD & Excel	WM						/										
18	F. Order Client Access for PC connectivity to AS/400	WM						/										
19	G. Order forms	JM				X												
20	H. Order labels for label printers	MM					X											
21	I. Order 7 label printers and 'K' laser printers	PT						/										
22	J. Order HCFA forms (check with Donna on what she currently has in stock)	MM						/										
23																		
24																		
25																		

REMARKS:	
PT - Peter Talbot	ML - Michelle Lopes
JM - Jim Mitchell	LL - Lynn Cash
CP - Chris Peltz	DB - Debbie Billings
MM - Meg Holt	DE - Don Evans
WM - Warner Mills	MU - Maureen Utto
DH - Donna Heller	CB - Catherine Branson
MS - Mike Sisco	
TW - Tom Welsh	
SL - Suzanne Long	

APPENDIX D – (continued) Sample Technology Conversion Plan

MDE Enterprises																			
10/12/2001		www.mde.net																	
Project: USHW FLORIDA Assimilation		SEP			OCT			NOV			DEC								
Proj. Mgr.: Mike Sisco (mike@mde.net; 666-555-1111)																			
ACTIVITY		Resp.	7	14	21	28	5	12	19	26	2	9	16	23	30	7	14	21	28
1	III. Infrastructure Implementation																		
2	A. Cable the clinics	PT							/										
3	B. Install WAN equipment and establish connectivity w/Quest (Clinics)	PT							/										
4	C. Install M/S Office, Client Access, and e-mail on PC's	PT																	
5	D. Install additional PC's and printers	PT																	
6	E. Configure systems to work w/existing environment (TCPIP)	PT							/										
7	F. Setup "bld system" access for ongoing "lookup"	PT																	
8	G. Set up workstation & printer at each facility for training	PT							/										
9	H. Determine means of printing screens for Stolas system after "live" (If print screens are not viable, Joe will create form template to use)	DH							/										
10																			
11																			
12	I. Conference call with Tom/Peter to coordinate logistics for "live"	MS						X											
13																			
14																			
15																			
16																			
17																			
18																			
19																			
20																			
21																			
22																			
23																			
24																			
25																			

MDE Enterprises																			
10/12/2001		www.mde.net																	
Project: USHW FLORIDA Assimilation		SEP			OCT			NOV			DEC								
Proj. Mgr.: Mike Sisco (mike@mde.net; 666-555-1111)																			
ACTIVITY		Resp.	7	14	21	28	5	12	19	26	2	9	16	23	30	7	14	21	28
1	IV. Clinic Setup (Systems)																		
2	A. Setup new clinic codes and related master files																		
3	- Facility & Division	MM					X												
4	- Sales Reps	MM					X												
5	- Physicians	MM					X												
6	- Collectors	MM					X												
7	B. Create Florida database on AS/400	DH					X												
8	C. Setup User-ID's & passwords - Network & AS/400	MM						/											
9	D. Setup e-mail addresses for designated users	MM						/											
10	E. Establish protocol administration procedures	ML						/											
11	F. Test database for Clinic/Revenue Management operation	ML						/			/								
12	G. Print report of physician setup for RBO review	MM						/											
13	H. Add Employer Master records to AS/400 database	ML						/			/								
14	I. Add Payor Master records to AS/400 database	ML						/			/								
15	J. Add Employer Protocol records to AS/400 database	ML						/			/								
16	K. Add Charge Master records to AS/400 database	ML						/			/								
17	L. Create Florida training database	DH					X												
18	M. Copy ICDS file to Florida	DH						X											
19	N. Add test codes (Joe/Chris to provide)	ML						/											
20	O. Obtain keys and security codes for access to clinics over the weekend	Mo									/								
21	P. Add OPTIO parameters for new clinics month-end reports	DHMM																	
22																			
23																			
24																			
25																			

APPENDIX D – (continued) Sample Technology Conversion Plan

Page 4

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10/12/2001 www.mde.net

Project: USHW FLORIDA Assimilation																				
Proj. Mgr.: Mike Sisco (mike@mde.net; 666-555-1111)																				

ACTIVITY	Resp.	SEP			OCT			NOV			DEC									
		7	14	21	28	5	12	19	26	2	9	16	23		30	7	14	21	28	
V. Programming																				
A1. Design 1st Visit Report #1	DH		X																	
A2. Program 1st Visit Report #1	DH					/														
A3. QA 1st Visit Report #1	CP							/												
B1. Design 1st Visit Report #2	DH		X																	
B2. Program 1st Visit Report #2	DH					/														
B3. QA 1st Visit Report #2	CP							/												
C1. Program DW-C-8 collection programs	DB					X														
C2. QA DW-C-8 collection programs	DHMD					/														
D1. Program DW-C-9 collection programs	DB					X														
D2. QA DW-C-9 collection programs	DHMD					/														
E. Set up mini-test data for training preparation	DHMM					/														
F. Create report of Employers sorted by \$volume with activity in past 12 months	DH					X														
G. Create report to identify Payors with Employer activity last 12 months	DH					/														
H. Determine solution to the Doctor PFI# issue	DH/DE					/														

Page 5

MDE Enterprises

10/12/2001 www.mde.net

Project: USHW FLORIDA Assimilation																				
Proj. Mgr.: Mike Sisco (mike@mde.net; 666-555-1111)																				

ACTIVITY	Resp.	SEP			OCT			NOV			DEC									
		7	14	21	28	5	12	19	26	2	9	16	23		30	7	14	21	28	
VI. Training - Clinics																				
A. Identify clinic onsite resources & schedule their participation	JM					/														
B. Define clinic training agenda and approach to use	MD		X																	
C. Prepare clinic training materials	MD							/												
D. Conduct clinic training	MD							/		/										
E. Conduct clinic "live support" resource training (24 hours prior to "live")	MD							/		/										
F. Provide "go-live" support	MD/CP							/		/										
VII. Training - HBU																				
A. Identify RBO training requirements for Florida	LC					/														
B. Define RBO training agenda and develop materials	LC					/														
C. Conduct RBO training	LC							/		/										
D. Provide "go-live" support	LC							/		/										
VIII. Training - Forms																				
A. Identify trainer	CP		X																	
B. Deliver training	JM					/														
IX. Physician Training																				
A. Identify trainer	CP		X																	
B. Prepare materials	JM					/														
C. Deliver training	JM							/		/										
D. Provide "go-live" support	JM							/		/										
X. Marketing Training																				
A. Identify trainer	CB		X																	
B. Prepare materials	CB					/														
C. Deliver training	CB							/		/										
D. Provide "go-live" support	CB							/		/										

APPENDIX E IT Initiatives Portfolio

This is a wide spreadsheet so it is split into two parts and provided only for reference.

9/2/11	IT Initiatives Portfolio	2008	Dept:						
IT Initiative	Responsibility	TIMEFRAME			On Time		BUDGET		Within Budget
Planned Time	Actual Time	Variance	Time	Budgeted Cost	Actual Cost	Variance	Budget	Budget	
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									

RESULTS	12-month Results	Meets User Need	My Rating	Comments
6-month Results	Forecast	Actual	Variance	Forecast
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				

Notes

The ***Practical IT Manager GOLD Series*** of books and tools will help you manage your IT organization better. The processes and tools discussed in these publications are used by thousands of IT managers around the world to ***achieve more success***.



The series includes the following titles and more:

- **IT Management-101**: fundamentals to *achieve more*[™]
- **IT Assessment**: the key to IT success
- **IT Strategy**: align your IT vision for business value
- **IT Project Management**: a *practical* approach
- **IT Asset Management**: tracking technology assets
- **IT Organization**: right-size your organization for success
- **IT Staff Motivation and Development**: build a world class team
- **IT Budgeting**: operational and capital budgeting made easy
- **IT Due Diligence**: merger & acquisition discovery process
- **IT Assimilation**: consolidating redundant technologies
- **What To Look For in a CIO**: get more value from your IT investment

“Every aspiring IT manager will, without question, benefit from your work.”
Bryn Thomas - Philadelphia, PA

“I am so thrilled to find a resource that addresses my needs as an IT executive. I’ve been looking for something like this for years.”
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“Mike’s experiences offer valuable insights on how to build an effective IT organization that can truly make a difference.”
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