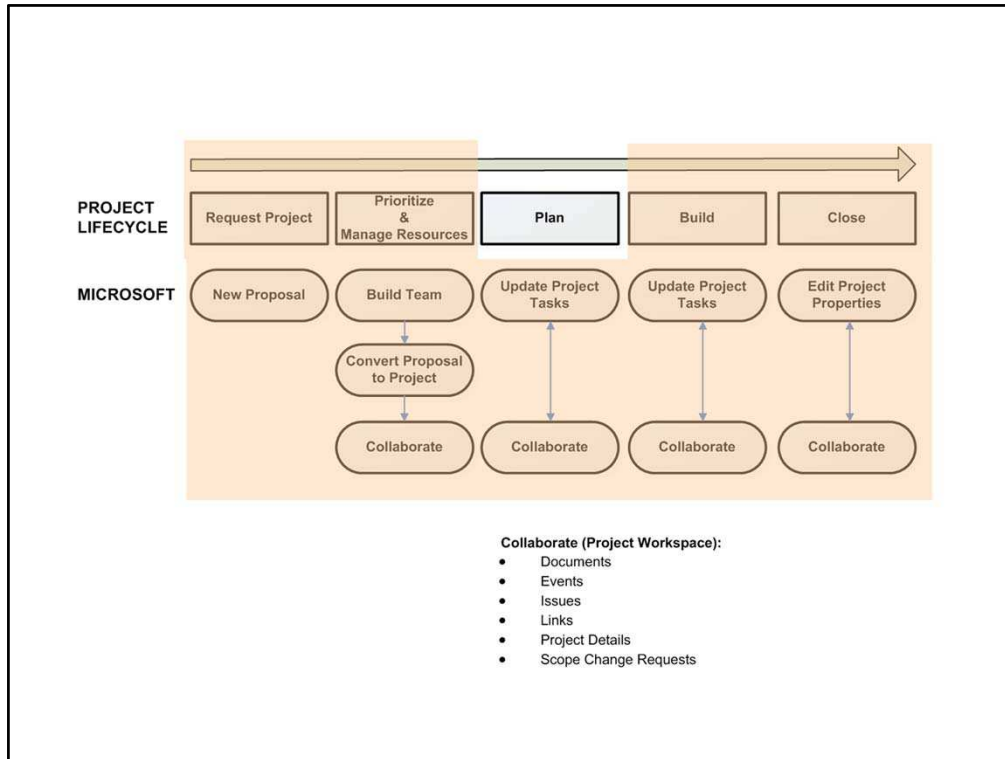# Building An Effective Task List

Brought to you by the ITS Project
Management Methodology

Agenda

- What a task list is
- Benefits of using a task list
- How to build a task list
- Practice makes perfect
- ITS task list template

Project Lifecycle – The initial building of the Task List is done in the Plan phase.

What is a Task List?

- **What** will be produced (deliverables)
- **How** the work will get done (activities)
- **When** the work will get done (start times, finish times, durations)
- **Who** will do the work (resources)
- **Relationships** between the tasks (predecessors & successors)

What are the Benefits?

- Anticipate what work needs to be done by each person
- Avert project disasters
- Answer status and planning questions from senior management
- Define and defend resources needed to be successful

Building a Task List
"What" & "How"

- What (Nouns)
  - List all the (known) deliverables
- How (Verbs)
  - Break work down into manageable chunks (activities)

- What next?
- What order?
- Include important checkpoints
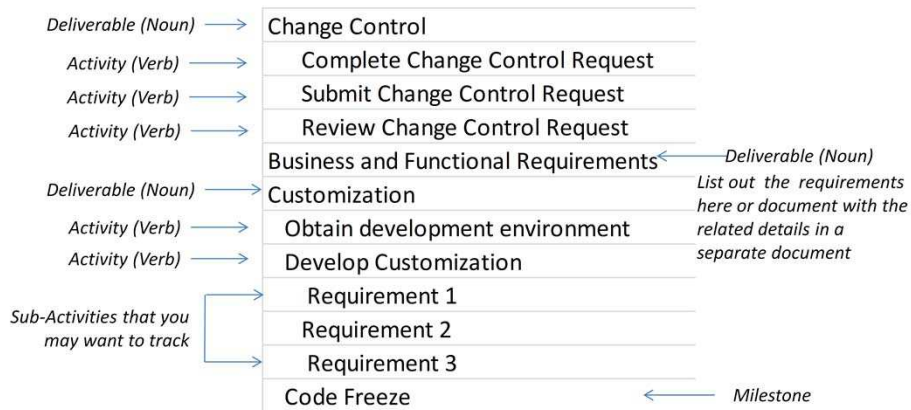
Sample tasks for Application Customization

- Think of it as a checklist and identify tasks down to the level appropriate for the project and experience of team members
    - Does someone need a list of steps in order to complete a task?
    - Will different people be responsible for each sub-activity?
    - What information do you need to track to make sure progress is being made?
- Remember that you may not have all of the details of your project up front. You may just have a single task sitting out there as a placeholder

Building a Task List
Where do Tasks come from?

- Task ideas:
  - Project Request,
  - Similar Prior Project's Task List and After Action Report,
  - Vendor contract,
  - Vendor's implementation guide,
  - HSU ITS PO Task List template

Leverage Past Work – Why start with a blank list if you do not have to?
Use the ITS PO Task List Template if it meets your projects' needs, otherwise create your own Task List.

Let's Start Building a Task List for:

Server Replacement

Deliverables (Nouns) only

Building a Task List
"When" & "Who"

When/Who:

- When?
  - Schedule with your finish date in mind
  - Start Time
  - Finish Time
  - Duration (give realistic estimate)
  - What can be done in parallel and what needs to be done **dependent** on another task
  - Known delays
- Who
  - Projects: Assigned through Prioritization Process
  - Work Requests: As identified

Pay Attention To:

- campus calendar (holidays/important dates)
- business calendar,
- vendor lead times,
- project's go-live date,
- other projects go-live dates

- personal calendars (vacations)

Dependencies: Some tasks that have to wait for something to finish, other tasks can start at the same time.

Practice Makes Perfect

- Groups of 2-3
- Pick one project
- Flesh out tasks
- One person's job to ask: "…and then what happens…"

Task List

- Planning
- Building
  - Development/ Production
  - Testing
  - Documentation
  - Communication
  - Training
- Closure

Task List Link

Task Name	Duration	Start	Finish	Predece	Resource Names
ITS PROJECT TEMPLATE	1 day?	Wed 2/2/11	Wed 2/2/11		
Planning	1 day?	Wed 2/2/11	Wed 2/2/11		
Create Project Schedule	1 day?	Wed 2/2/11	Wed 2/2/11		
Plan communications	1 day?	Wed 2/2/11	Wed 2/2/11		Project Lead
Plan training	1 day?	Wed 2/2/11	Wed 2/2/11		Project Lead
Design environment	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Build	1 day?	Wed 2/2/11	Wed 2/2/11		
Dev 1	1 day?	Wed 2/2/11	Wed 2/2/11		
Build environment	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Documentation	1 day?	Wed 2/2/11	Wed 2/2/11		
Create business process guide	1 day?	Wed 2/2/11	Wed 2/2/11		Functional Lead
Create configuration guide	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin,Functiona
Create Implementation/Upgrade Plan v.1	1 day?	Wed 2/2/11	Wed 2/2/11		Project Lead
Create Service Operating Practice (SOP)	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Create System Profile	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Create Service Deployment Checklist	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Create ITS Change Procedure	1 day?	Wed 2/2/11	Wed 2/2/11		DBA
Create test script	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin,Functiona
Test	1 day?	Wed 2/2/11	Wed 2/2/11		
Test	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin,Functiona
Sign-off	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin,Functiona
Wipe Dev 1	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Dev 2	1 day?	Wed 2/2/11	Wed 2/2/11		
Build environment	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Documentation	1 day?	Wed 2/2/11	Wed 2/2/11		
Update business process guide	1 day?	Wed 2/2/11	Wed 2/2/11		Functional Lead
Update configuration guide	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin,Functiona
Update Implementation/Upgrade Plan v.1	1 day?	Wed 2/2/11	Wed 2/2/11		Project Lead
Update Service Operating Practice (SOP)	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Update System Profile	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Update Service Deployment Checklist	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin
Update ITS Change Procedure	1 day?	Wed 2/2/11	Wed 2/2/11		DBA
Update test script	1 day?	Wed 2/2/11	Wed 2/2/11		SysAdmin,Functiona
Create MTP checklist	1 day?	Wed 2/2/11	Wed 2/2/11		Project Lead
Create Change Control doc	1 day?	Wed 2/2/11	Wed 2/2/11		Project Lead

Recommendations

- Develop a first draft
- Flesh out with team (collaborate)
- Review with stakeholders
- Use placeholders
- Place complex work early in the project
- Break the Build phase into cycles
- Adjust estimates if unfamiliar with work
- Use contingencies

Develop a first draft. It is easier for others to review and comment on vs. asking them to start with a blank page.

Flesh out with team (collaborate) - These are the experts in their areas and should know what needs to be done and how much time it should take.

Review with stakeholders – They need to agree to the schedule and support it.

Use placeholders for work that you know will need to get done, but you either do not have enough information at the time or the detail is irrelevant at the time.

Place complex work early in the project because it can often take longer than planned and/or bring up issues

If the project is large or complex, break the Build phase (with a bit of planning) into a series of 3-6 week cycles (iterations) because it is often difficult to identify all requirements up front, requirements often change, and it guarantees that important work isn't left until the end of the project.

Adjust estimates if someone is new to their role or if the technology is new

Build a time reserve into the schedule for contingencies and unforeseen events. A contingency is a specific provision for unforeseeable elements that could cause schedule delay. How much time contingency to allow can depend on:

    The degree of acceptable risk for delays

    The completeness of the project scope and requirements

    How well the work will be managed

    A good rule of thumb for schedule contingency is 20%, but a project can include more or less based on the factors above.

Q&A

More Info

- ITS Project Methodology
  https://www.humboldt.edu/its/po-methodology

- ITS Project Task List Template (MS Project file)
- https://www.humboldt.edu/its/sites/its/files/docs/po-docs/ITS_Project_Template.mpp

- ITS Project Task List Template (Excel file)
  https://www.humboldt.edu/its/sites/its/files/docs/po-docs/ITS_Project_Template.xls

Useful Terms

- Activity – What needs to get done in order to produce a Deliverable (ex. draft Business Process Guide, approve Business Process Guide, post Business Process Guide to website, etc.). Microsoft Task.
- Dependency - Timing relationships among tasks. A task has a dependency if it involves an activity, resource or work product which is subsequently required by another task.
- Deliverable – The thing that will be produced (ex. Business Process Guide, software customization, progress report, etc.). Microsoft TaskDuration – The amount of time that an activity should take in minutes, hours, or weeks. Add a '?' if it is an estimate.
- Go-Live – The date when users have everything that they need to do their work and the production system is ready (also known as a rollout date).
- Milestone – A significant project event (ex. Go-Live, end of a Project Cycle, business requirements freeze, etc.) and has a zero duration.
- Percent Complete – A lot of time can be wasted trying to determine the exact amount of work was completed. At HSU ITS we are using just two percentages:
  – 0 = activity is not complete
  – 100 = activity is complete
- Predecessor - Tasks that must begin or be completed in order for another task to begin.
- Project – An effort that is estimated to take more than twenty hours and use more than one work resource (HSU ITS definition).
- Project Lifecycle – The phases can be known by a variety of names based on the project methodology that a company selected, however the concepts are the same. HSU ITS uses the following cycle names:
  – Plan (Concept and Investigation/Analysis) - Definition of the project purpose, scope (what's in / what's out), resources, and functional requirements.
  – Build (Development and Transition) – includes design, development, testing, documentation, communication, and training.
  – Close – Conduct a Lessons Learned session and finish any open tasks.
- Resource - Person assigned to a task or the project team.
- Summary Task - The top level of closely related tasks.