

Best Practices

For Project Managers
and Project Teams

Best Practices

Project Management is a culture not a process

1. Defining “Done”
2. Communications
3. Dates
4. Milestones
5. 80 Hour Rule
6. FS, SS, FF & Lags
7. Risk Management
8. Locking the baseline
9. Network Diagram/Gantt
10. Project Plan Owners
11. Surprises (not)
12. No Dead Bodies

“Done”

Project Management is a culture not a process

- “Done” is defined for two reasons
 1. Definition of Acceptance Criteria so everyone (project team, stakeholders, and customers) know when the project (phase, version) is DONE, FINI, COMPLETE, CAPUT)
 2. When project team members can be reassigned to other projects.

Communications

Project Management is a culture not a process

- Help your customer to be successful
- The more you communicate to your customer the more he/she can communicate to their boss.
- The more information you provide to your customer the more data they will have to communicate to their bosses.
- The more you tell them the less need they will have to come seek you out to ask.

Communications - Reporting

Project Management is a culture not a process

- Two forms of reporting
 - Inbound
 - Outbound

Communications - Reporting

Project Management is a culture not a process

- Inbound Reporting (via PWA)
 - With PWA (Project Web Access) team members report their weekly project activities and NON project activities “What things did I do that prevented me from completing my assigned task.”
 - Full and open communications – if a team member cannot complete an assigned task as scheduled, as promised, as planned, then the project manager **NEEDS TO BE TOLD**.

Communications - Reporting

Project Management is a culture not a process

- Inbound Reporting (without PWA)
 - With weekly task report team members report their weekly project activities and NON project activities, “What things did I do that prevented me from completing my assigned task.”
 - Full and open communications – if a team member cannot complete an assigned task as scheduled, as promised, as planned, then the project manager **NEEDS TO BE TOLD**.

Communications - Reporting

Project Management is a culture not a process

- Outbound Reports by Team Members
 - One of the best ways to be successful is to help your boss to be successful.
 - One of the best ways to help your boss to be successful is to communicate
 - One of the best to communicate is to provide weekly (or in some situations daily) task reports
 - The Project Manager needs to know about your progress and if anything is preventing you from completing your assigned tasks.

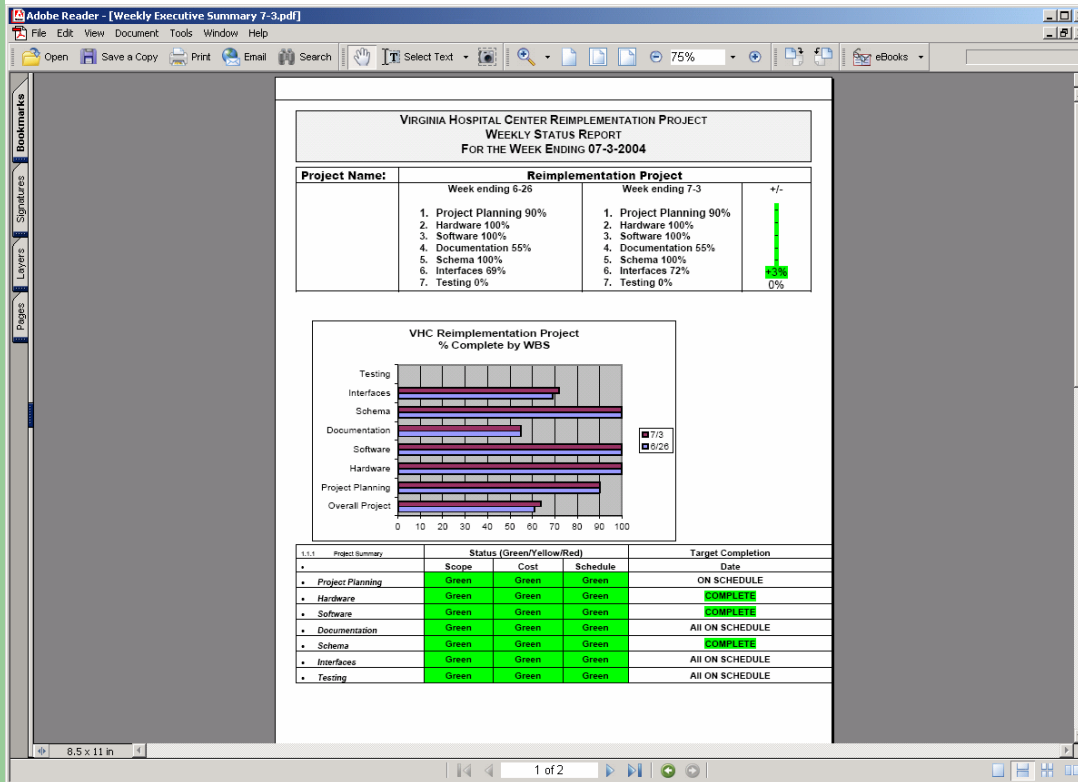
Communications - Reporting

Project Management is a culture not a process

- Outbound Reports by Project Managers
 - One of the most important jobs you have is to keep your boss (customer) totally current with all issues, successes, or failures of your project, project progress, and project team.
 - Give your boss a report he/she can send to his boss. Make them look good and you will shine.

Sample Executive Summary Report

Project Management is a culture not a process



This type of Weekly Executive Summary Report “QUICKLY” tells the recipient the progress and page 2 identifies Potential problem areas

Sample Executive Summary Report 2

Project Management is a culture not a process

The screenshot shows a PDF document titled "VIRGINIA HOSPITAL CENTER REIMPLEMENTATION PROJECT WEEKLY STATUS REPORT FOR THE WEEK ENDING 07-3-2004". The document is displayed in Adobe Reader. The content includes a "Comments" section with notes on project completion (64% overall), "Key issues" (testing scenarios), "Key project accomplishments for this week" (72% interfaces done, completion date 9/14), and "Other issues" (Version 7 of the project plan). Below this is a "Change Request Forms" table with one entry (CROF # 0001, In process, Approved, 4-24-04, 3limited). A legend at the bottom explains color coding: Green (on schedule), Yellow (slipped), and Red (affecting overall delivery date).

Comments
Notes for above Project Summary
The project has achieved 64% overall complete.

Key issues

- Testing scenarios await resource assignment * this could become a major issue as we move closer to the system testing phase.

Key project accomplishments for this week

- Interfaces are 72% done.
- Project projected completion date estimated to be 9/14.

Other issues

- Version 7 of the project plan is now the applicable plan.

Change Request Forms

| CROF # | LS-Status | JS-Status | Entry Date | Action Date | T&M Est | Impact on Sched |
|--------|------------|-----------|------------|-------------|---------|-----------------|
| 0001 | In process | Approved | 4-24-04 | | | 3limited |
| | | | | | | |
| | | | | | | |

Legend:
Green i.e. Milestone on schedule
Yellow i.e. Milestone has slipped
Red i.e. Milestone slippage is affecting overall delivery date

Page 2 of the report identifies potential problem areas, identifies and tracks change orders

Dates

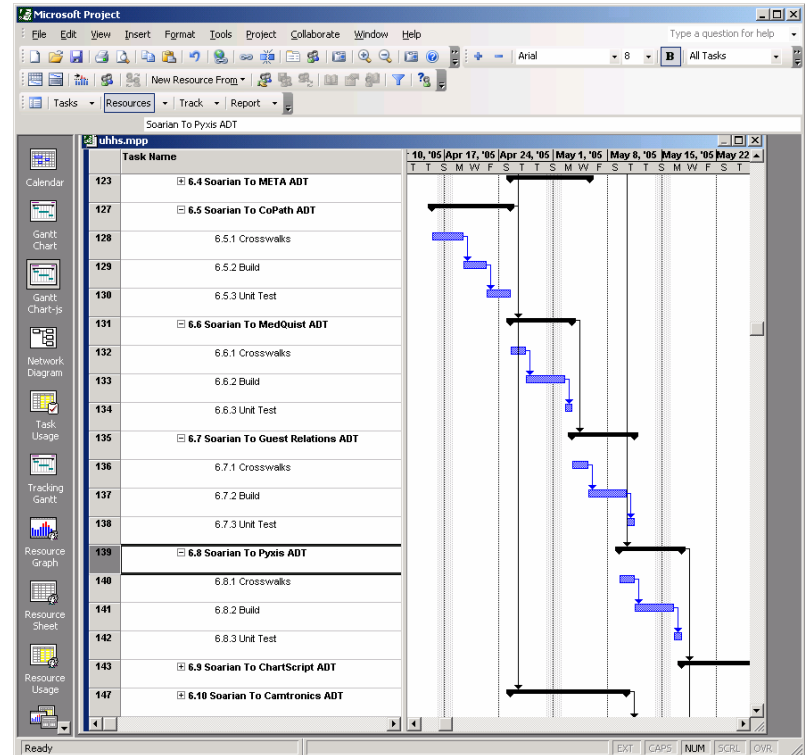
Project Management is a culture not a process

- Only “1” date should be entered in a project plan (Project Start Date)*
- All other dates should be a result of Predecessors
- * **Exception** (e.g. training, hardware delivery, 3rd party products)

Dates

Project Management is a culture not a process

- All project dates should be a result of previous tasks.
- Tasks need to be linked and rely on F/S, S/S, F/F.
- Using Lags +/-



Working with Dates in MSProject

Project Management is a culture not a process

- Start/Finish (Scheduled Start/Finish)
- Actual Start/Finish
- % Complete
- Baseline1 Start/Finish

The screenshot shows the Microsoft Project interface with a task list table. The table has the following columns: Task Name, %, Sch St, Sch Fin, Act St, Act Fin, B/L St, and B/L Fin. The data is as follows:

| Task Name | % | Sch St | Sch Fin | Act St | Act Fin | B/L St | B/L Fin |
|--|------------|----------------|----------------|----------------|-----------|---------------|----------------|
| 1 Project Planning & Administration | 1% | 4/11/05 | 3/29/06 | 4/11/05 | NA | 4/4/05 | 3/21/06 |
| 1.1 Planning Meeting | 72% | 4/11/05 | 4/13/05 | 4/11/05 | NA | 4/4/05 | 4/5/05 |
| 1.1.1 Establish Status Meeting Schedule | 100% | 4/11/05 | 4/11/05 | 4/11/05 | 4/11/05 | 4/4/05 | 4/4/05 |
| 1.1.2 Discuss Training Schedule | 50% | 4/11/05 | 4/11/05 | 4/11/05 | NA | 4/4/05 | 4/4/05 |
| 1.1.3 Review Communication Protocol | 0% | 4/11/05 | 4/11/05 | NA | NA | 4/4/05 | 4/4/05 |
| 1.1.4 Determine Unison's Onsite Schedule | 100% | 4/11/05 | 4/12/05 | 4/11/05 | 4/12/05 | 4/4/05 | 4/4/05 |
| 1.1.5 Discuss Unison's Remote Support | 0% | 4/13/05 | 4/13/05 | NA | NA | 4/5/05 | 4/5/05 |
| 1.2 Project Documentation | 0% | 4/13/05 | 4/22/05 | NA | NA | 4/5/05 | 4/14/05 |
| 1.3 Status Meetings | 0% | 4/13/05 | 3/29/06 | NA | NA | 4/5/05 | 3/21/06 |

Milestones

Project Management is a culture not a process

- A Milestone is a stake in the ground
- A typical Milestone has a '0' Duration
- Some tasks maybe assigned as a Milestone
- Milestones are good for everyone
- They communicate project success status

80 Hour Rule

Project Management is a culture not a process

- Keane Consulting says, “No Work Package (task) should be greater than 80 hours.”
- Break the work down into meaningful achievable work
- Completing smaller tasks gives a sense of accomplishment

F/S, S/S, F/F

Project Management is a culture not a process

- All tasks CAN BE linear or
- Some tasks can be linear or
- Both
- Some tasks can be:
 - Finish/Start
 - Start/Start
 - Finish/Finish

Fast Tracking and Lags

Project Management is a culture not a process

- Starting one task before the predecessor is Finished is Fast Tracking
- A Lag is:
 - F/S – 1day
 - S/S + 1 hour
 - F/F + 1 hour

Identifying Risks and Mitigations

Project Management is a culture not a process

- Known Knowns
- Known Unknowns
- Unknown Unknowns
- The art of managing Risks is to plan for them or plan on mitigating them. Definitely not ignoring them.

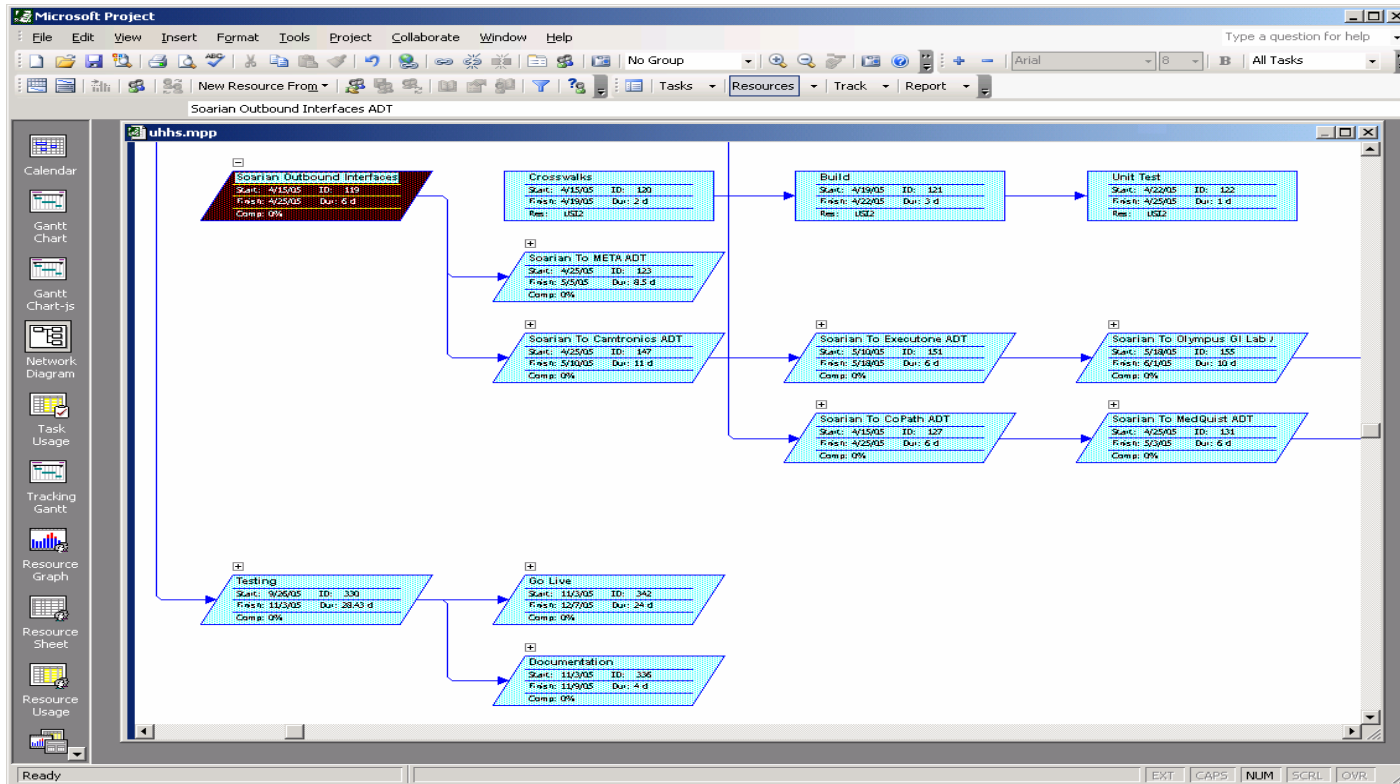
Baselining, Locking the Baseline

Project Management is a culture not a process

- Setting the Baseline protects the Project Manager
- Resetting the Baseline should never be done unilaterally by the Project Manager. Should only be done with stakeholder and customer's approval
- The Baseline dates is your protection

Gantt Chart / Network Diagram

Project Management is a culture not a process



Owners of the Plan

Project Management is a culture not a process

- Who owns the project plan?
- You do!
- There is only one version of the project plan and you have it.

Surprise!

Project Management is a culture not a process

- NO SURPRISES!!!!
- Everyone talks to everyone else.
- Your team communicates with you and you communicate with them.
- You communicate with your customer
- Everyone knows everything
- NO SURPRISES!!!!

No Dead Bodies

Project Management is a culture not a process

- Managing a project is not a license to shoot the messenger or kill your resources.