



**Project Management  
Fundamentals**

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A Project Bill of Rights for  
Public Health Professionals  
May 14, 2003




**Presentation Team**



- Advanced Strategies, Inc.
  - Ed Wynn, Project Manager and Presenter
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    - Ila Gressette, Client Support
- Minnesota Department of Health
  - Jim Miller, Project Manager and Presenter


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**Today's Project Environment**



Today's Project Professional should:

**“Demonstrate the ability and inclination to...**




**‘...tolerate chaos, ambiguity, and lack of knowledge, and to function effectively in spite of them.’\***

\* Position description for Senior Analyst/Designer at a major software company.

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**Presentation Objectives**



- Educate Public Health Professionals on why Project Management is critical to IT project success
- Discuss a project “bill of rights” outlining rights and responsibilities of project participants
- Examine how the responsibilities of participants work together to maximize the likelihood of project success

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## Presentation Focus



### Target Audience:

- Primary: Public Health Leaders
- Secondary: IT Professionals

### With particular emphasis on:

- Project sponsor(s)
- Project manager/leader(s)
- Project team/participants



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## Presentation Context




Project Management is a broad and deep topic - we can only skim the surface in this session

Clarifying terms, for purposes of this presentation:

- “Business” refers to the business of government, sometimes called “program staff”, frequently thought of as the customer for a project
- “Project team” refers to the providers of a solution, normally includes business and technology resources


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## Session Topics

- Session Introduction
- ➔ Introduction to Project Management
  - Present Project “Bill of Rights”
  - Responsibilities and Expectations (Roles)
  - Lessons from a Live Project
  - Tools for Getting Started
  - Questions & Answers
  - Closing

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## Introduction To Project Management

- What is a Project:
  - Marshalling of Resources
  - Specified Set of Results
  - Deliberate Process
  - Definite Time Span
- A management vehicle for the **Marshalling of Resources** including one or more individuals (and other resources) to produce a **Specified Set of Results** via a **Deliberate Process** within a **Definite Time Span**.

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## Introduction to Project Management

- What is Management
  - Getting work done **through** resources, including people.
  - Key activities:
    - Planning
    - Organizing
    - Coordinating
    - Overseeing
    - Appraising

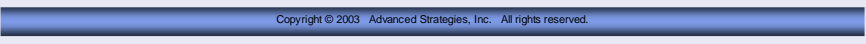


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## Introduction to Project Management

- Why It Is Important
  - Why Projects are Important
  - Why Project Management is Important
  - Why is it Especially Important in IT Projects
- Why It Is **Often Neglected**
  - Too busy responding to the urgent to do the important
  - Frequently does not naturally fit into any one person's job
  - Crosses organizational boundaries (e.g. multiple business departments and IT)
  - Misunderstanding of the skills and level of effort that is necessary



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## Introduction to Project Management About Project Success Rates



### For IT Projects in General

- 28% are canceled before completion
- 33% are challenged by cost/time overruns or changes in scope

Source: Standish Group International Inc.'s Chaos Report 1998

### For Enterprise Applications (e.g. SAP, PeopleSoft)

- 70% did not encounter problems in getting the software to run
- But only 35% were satisfied with the Return On Investment they are getting

Source: Peerstone Survey – Information Week Daily Nov. 13, 2002

### For Software and Technology Purchases

- U.S. Companies threw away \$130 billion on unneeded software and other technology in the past 2 years

Source: Morgan Stanley – USA Today May 20, 2002

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## Introduction to Project Management “Why Projects Fail”



- Your Experience



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## Introduction to Project Management “Why Projects Fail”



- Project team does not understand business needs
- Scope is ill-defined
- Project changes are managed poorly
- Business needs change
- Users are resistant
- Sponsorship is lost
- Not ensuring solid business sponsorship
- Deadlines are unrealistic
- Project lacks people with appropriate skills
- Failing to break projects into manageable “chunks”
- Not tracking project progress
- Mistaking half-baked ideas for viable projects

Extracted from articles in CIO Magazine by Tom Fields and Gopal K. Kapur

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## Introduction to a Project "Bill of Rights"



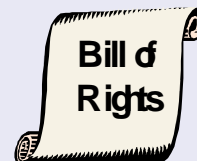
- Public Health Leaders have the right to successful IT projects
- Successful IT projects require a partnership between business and IT
- Effective partnerships require a shared understanding of what is expected of you and what to expect of others:
  - Premises
  - Processes
  - Roles
  - Other elements of the environment
- Rights come with responsibilities
- This presentation will highlight key elements of a project that should be agreed to in order to improve the likelihood of project success

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## Project "Bill of Rights" Summary *Public Health Leaders Have The Right To:*



1. A business-driven project
2. A shared understanding and commitment to the desired business outcome
3. A well defined project scope
4. A customer-centric project
5. Formal analysis of the business
6. An approach of: form follows function follows purpose
7. Formal breakdown of project work into manageable tasks
8. Transformation of project work products
9. A documented and understandable project plan
10. Project communication plans
11. Assessment and management of project risks
12. A project manager that is managing rather than doing



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*Project Right #1 (of 12):*

## A Business-Driven Project



- Success is measured by reaching desired business results
- Not just:
  - Technology is in place
  - Contracts are completed
  - Personal growth and development
  - On-time, on-budget, etc.
- All tasks are focused on moving to these results



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*Project Right #2 (of 12):*

## Shared Understanding And Commitment To The Desired Business Outcome



### Shared Understanding

- Documented and shared with stakeholders
- Clear enough that others will know what it is

### Commitment

- Opportunity to shape to meet your needs
- Realistically obtainable and politically viable and sustainable

### Desired

- Recognized as good without a lot of debate
- Addresses all necessary perspectives

### Business Outcome

- The results will be observable
- Tie to both organizational goals and day to day work



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*Project Right #3 (of 12):*

## **A Well Defined Project Scope**



- A description of what should be studied and provided for by the project
- Includes determining whose perspective should be included and at what level of detail
- It helps answer the questions:
  - Should we be spending our time on this topic?
  - Are we the right people to be doing this?
- It is the primary tool for controlling “run away” expansions of an effort

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*Project Right #3 (of 12):*

## **A Well Defined Project Scope**



- Tips:
  - Project is most efficient with a minimal number of scope changes
  - Best to begin with scope at its largest and then carve it down as we proceed based on potential impact – scope that decreases over time
  - Because we want to be business driven (Right #1) – a project is not successful if it does not realize the desired business results (even if product is delivered on time and on budget)
    - Address a business need(s), not pieces of multiple needs
    - Multiple sub-projects must fit together to meet a need

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**Project Right #4 (of 12):**

## **A Customer Centric Project**



- Business customer is in the *center* of the process, not relegated to the periphery
  - Determine business results, scope, and priorities
  - Specify needed functionality
  - Confirm the design
- Project speaks the language of business in the analysis, the plans, ...
- Project should make best use of business customers time
- Business and project team share the risks

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**Project Right #5 (of 12):**

## **Formal Analysis of the Business**



Study the business within the scope, including:

- Discovery – document the business as it *really is* today, including interdependencies
- Assessment – determine what we already have that enables or prevents us from reaching the desired end results
- Specification – document the business as we intend it to be

Note: each of the above includes business policy, procedures, rules, and relevant mechanisms

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## Project Right #5 (of 12): Formal Analysis of the Business



### Suggestion: "Model" the Business

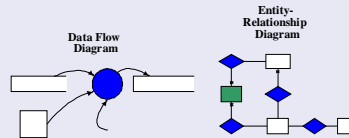
What is a Model?

"A small object, ..., that represents another, often larger object."  
*American Heritage Dictionary*

A tentative description of *something* accounting for *certain kinds* of properties,  
 from a given focus.

#### Examples

- Road Map of the US
- Organization's Org Chart
- Data Flow Diagram of Processing Payroll



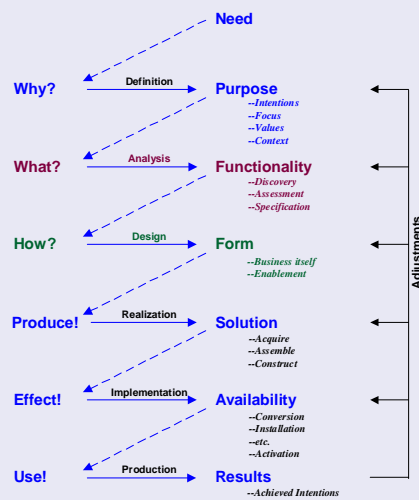
Most frequently used types of Business Models:

- Process – documents activities and the flows of information
- Object/Data – documents relationships between needed information

Model:= Diagram + Text

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## Project Right #6 (of 12): An Approach Of: Form Follows Function Follows Purpose *A Path to a Solution*



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## What Happens When We Are Given/Mandated a Solution



- What we typically see (**not** recommended)
  - Start in the middle of the “Path” (e.g. form or solution)
  - Implement gift/mandated product
  - Initiate project(s) to adjust product, business, or environment
- Suggested – extend and narrow the “Path”
  - Evaluate the gift/mandate – what it does, benefit to the business it is expected to provide
  - Consciously chose portions to “accept”
  - Initiate a business driven project from top of “Path”
    - Each step on the path should be faster
    - Each step is to serve the business in best possible way

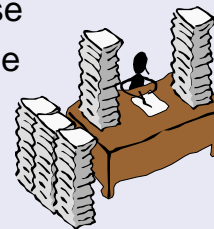


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## Project Right #7 (of 12): Formal Breakdown of Project Work Into Manageable Tasks



- Underlying process that makes sense
- Broken into intellectually manageable pieces you can:
  - Understand
  - Track
  - Accomplish successfully
- Tasks should be broken down into pieces within your organizational attention span
- No:
  - Black boxes, magic happens, trust us here, ...



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**Project Right #8 (of 12):**

**Transformation of Project Work Products**



- Every task produces a tangible work product
- See how work products are used - tasks build on prior tasks
- Transformation is more than intuition
- No shelf-ware (products that are not used)
- Each output is traceable:
  - Back to the business purpose and requirements
  - Forward to the solution
- Don't lose the input from the business
  - Testing and business acceptance occurs at each transformation (QA not QC)

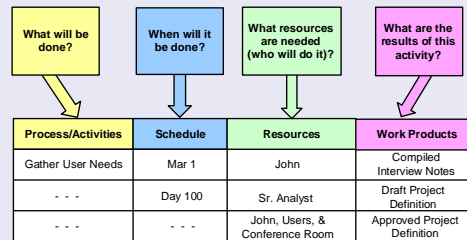
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**Project Right #9 (of 12): A Documented And Understandable Project Plan**



• Minimal Components of the Plan

- What is to be done
- Who will do it
- When will it be done



• Characteristics

- Honest
- Realistic
- Understandable (e.g. by the business)
- Defensible
- Evolving

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***Project Right #10 (of 12):***

## **Project Communication Plans**



- Agreed to frequency, contents, and mechanism for communication:
  - Internally for status
  - Externally to continue momentum and support
  - Formal and informal
- Communications should be:
  - Honest/realistic
  - Understandable (e.g. by the business)
  - Tailored to the targeted perspective
    - Relevant breadth
    - Appropriate level of detail
    - Speak the language of business

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***Project Right #11 (of 12): Assessment And  
Management of Project Risks***



- What is a "Risk" – Any Uncertainty
  - Risk – if happens impacts the project negatively
  - Opportunity – if happens impacts the project positively
- Classes of Possible Action
  - Prevent or Encourage
  - Plan Contingency(s)
  - Insure
  - Abort project
  - Ignore
- How to Manage Project Risks
  - Identify uncertainties
  - Determine baseline
  - Classify (risk, opportunity, etc.)
  - Keep a written log
  - Prioritize items (80/20 rule)
  - Schedule time and work selected items
  - Schedule items (when in future you want to see it again)



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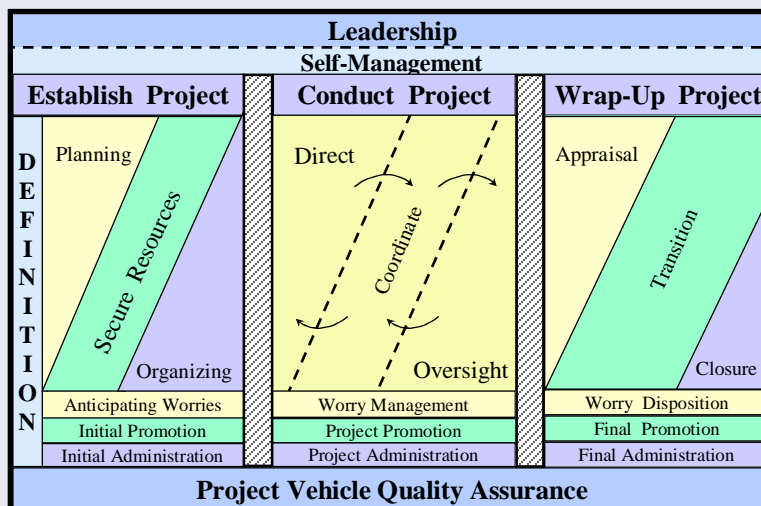
## Project Right #12 (of 12): A Project Manager Who Is Managing Rather Than Doing



- Why a **Managing** Project Manager?
  - If the project manager is not managing the project, who is?
  - Managing more effectively enables multiple resources
  - The plan is constantly changing in response to the changing environment
  - Minimize surprises for stakeholders
- Why Not a **Doing** Project Manager?
  - Urgent will typically supercede important
  - Difficult to see forest when working on a tree
  - Do not know what to do to manage

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## Project Right #12 (of 12): A Project Manager Who Is Managing Rather Than Doing



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**Session Topics**



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## What Can I Do And What Can I Expect From Others If I Am:



- A Project Sponsor (Business, IT, other)
  - Set direction
  - Secure resources
  - Champion/icon
  - Resolve the irresolvable
- A Project Manager/Leader (one or close team)
  - Responsible for success of project
  - Direct, coordinate, intervene, lead and communicate
- A Project Participant
  - Provide input
  - Follow plan
  - Do work
  - Communicate with project manager/leader

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## Conclusion: “Why Projects Fail”



- Project team does not understand business needs
- Scope is ill-defined
- Project changes are managed poorly
- Business needs change
- Users are resistant
- Sponsorship is lost
- Not ensuring solid business sponsorship
- Deadlines are unrealistic
- Project lacks people with appropriate skills
- Failing to break projects into manageable “chunks”
- Not tracking project progress
- Mistaking half-baked ideas for viable projects

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## Conclusion: Today's Project Environment



*These techniques will not eliminate  
Chaos, Ambiguity, and Lack of Knowledge,  
but we have found that they help to enable  
people to function effectively in spite of them.*



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## Minnesota Department of Health and Project Management

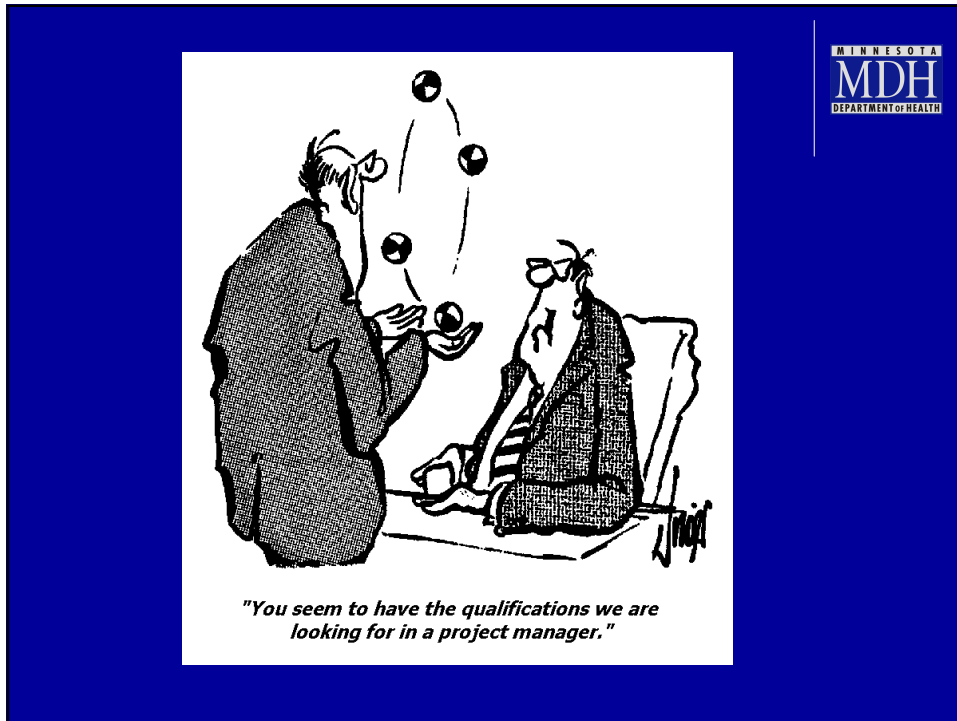


- The Minnesota Department of Health is implementing Project Management disciplines
- We are working to educate both IT and program staff on the advantages, expectations, and processes for using Project Management

## Project Management and the NEDSS Team



- Worked with team to outline project management approach and responsibilities
- Implemented basic project development infrastructure
  - Development methodology
  - Disciplined testing approach
  - Production environment and support procedures
- Engaged consultants as needed for specific activities



## A Study in Contrasts

- Two examples of projects undertaken within the last year
  - A System Transition that effort did not use basic project management techniques
  - An Electronic Data Exchange project that applied project management practices

## Case Study – System Transition



- A request was made to move a system to the server environment supported by the NEDSS team
- Involved three IT groups
  - NEDSS Team
  - MDH Central IT
  - MDH Program IT

## Initial Assessment



- Had casual conversations with the customer regarding their expectations
- Took a cursory look at the work needed to install the software in our environment
- Decided that this was not significant enough to treat as a project

## Skipped Project Planning Steps



- Did not define the business requirements
- Skipped definition of the success criteria
- Did not create a project plan
- Did not create a communication plan
- Did not identify potential risks or a plan for mitigating those risks if encountered

## Project Challenges



- Project turned out to be more difficult than originally envisioned
  - New technology
  - Incomplete documentation
  - Resources were often unavailable when needed
- All of these problems should have been identified as potential risks!

## Results



- **Project was delayed**
- **Customer and project team were unhappy with the progress**
- **Project was eventually completed thanks to the efforts of dedicated team members**



"There's still some work left in this one. Get him another pot of coffee."

## Case Study – Electronic Data Exchange



- Involved implementing a new technology to securely exchange data
- Involved five different groups of project participants
  - MDH Epidemiology Program
  - MDH Lab
  - External Lab
  - Vendor – VisionShare
  - NEDSS Team

## Initial Assessment



- We completed the basic project definition and assessment steps with the program staff
- Even though this appeared to be a small effort, we decided to treat this effort as a project

## Completed Basic Project Management Steps



- Identified and documented the business requirements
- Identified and documented the success criteria
- Completed a project plan
- Identified potential risks and a mitigation plan
- Developed a clear communication plan

## Project Obstacles



- External lab resources were unavailable at key times
- Other work became a priority for project staff as other projects proceeded ahead of schedule
- Project resources were at times diverted to other projects

## Impact on the Project



- **Some dates slipped, but remained within the tolerance of the project plan and risk assessment**
- **Communication between all parties continued as obstacles were encountered**
- **The customer was involved when obstacles were encountered and alternate solutions were considered**

## Results



- **Project was a success as measured by the success criteria**
  - **Business needs were met**
  - **Communication was maintained**
- **Project participants were satisfied**
- **Project team felt sense of accomplishment**

## What We Learned




- **Treat all new work as a potential project**
- **Always complete an initial assessment. Assessment should include:**
  - Amount of effort required (person hours)
  - Estimated time required (duration)
  - Number of project participants
  - Number of impacted parties
  - Number of unknowns
  - Complexity of the effort
  - Criticality of the task

## What We Learned (continued)



- **Based on the assessment, decide if you have a project, a sub-project or regular work tasks**
- **Identify and work closely with your customer**
- **Leverage your project development methodology**
- **Keep all parties in the loop!**


Jim Miller, Project Manager  
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## Application: Tools For Getting Started

### Warning Signs (1 of 2):

- ❑ No documented and agreed-to statement of how the project will assist in reaching specific business goals
- ❑ The name of the project specifies the targeted solution rather than the business result
- ❑ Insufficient access to the appropriate variety of business experts
- ❑ The resources called for in the project plan are not realistically available
- ❑ Project team members are responsible for multiple efforts without clear priorities
- ❑ There is not a single party responsible for the day-to-day conduct and overall success of the effort
- ❑ The single responsible party is not <singly> focused on this project

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## Application: Tools For Getting Started



### Warning Signs (2 of 2):

- ❑ There is not a clear, feasible series of steps for reaching the desired results
- ❑ The project plan is not maintained regularly and does not evolve as the project progresses
- ❑ The process skips analysis of the business needs and jumps straight to the solution
- ❑ It is not clear what event will trigger the beginning or end of the project
- ❑ There is a stated deadline but no clear finish line
- ❑ There is no plan to transition the finished product to ongoing use and maintenance
  
- ❑ The business does not have access to project work products such as business models, project plan, and uncertainty (risk) log
- ❑ Work products are produced but it is not clear how they will be used
- ❑ End customers have not been updated on project progress and changes


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## Questions And Answers

QUESTION ?

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