



VCU

SOMTech

School of Medicine

Project Management Basics

Client Services Unit

04/15/20

1pm – 2pm

Agenda

- Welcome & Review Session Ground Rules
- Project Management
- IT Work Requests
- Change Management
- Conclusion/Wrap Up

Session Ground Rules

- This training session will be recorded and made available to Client Services
- Please stay on mute when not speaking
- Active participation is encouraged
- For questions/comments, please utilize any of the following:
 - Submit questions via Chat
 - “Raise hand” from Participant Panel
 - Will also have Q&A time at the end of the presentation (time permitting)

Project Management





What is Project Management?

The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

-Project Management Institute (PMI)

History of Project Management

“Modern” project management started in the late 1950’s. By the early 60’s, computer technology was quickly evolving.

- In 1958, Peter Norden published a paper, “On the Anatomy of a Development Project” based on what he was observing in computer development at IBM.
- *New Critical Path & Scheduling System* presented.
- Willard Fazar published a paper in 1958 on PERT — “Program Evaluation Review Technique.”

What is a Project?

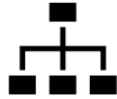
It's a temporary endeavor undertaken to create a unique product, service or result.

-Project Management Institute (PMI)

Key Characteristics of Projects:

- Every project has definite beginning and end.
- The result is *unique*, different from all other products or services provided by the subject organization.
- Operations and maintenance activities are not projects if activities are for the continued use of a product or service.
- Significant procurements are not projects if for ongoing maintenance and operations of IT assets. For example, server or network upgrades.
- **SOMTech proposed projects with 300 or more estimated hours must go before the SOM ITSC review and approval; this requirement is currently for Application Services.**
- Requires a team of people across the department, across the organization and/or involves vendor participation.
- Defined project structure including assigned Project Sponsor, project team and project manager, where appropriate.

Characteristics of Successful Projects



Project Sponsor Support



A plan that shows an overall path & clear responsibilities that can be used to measure progress during the project



Frequent, effective communication among everyone involved in the project



A Controlled Scope



Agreement among the project team, internal/external clients, and management of the goals of the project

A red, tilted rectangular stamp with the word "DRAFT" in white, bold, uppercase letters.

Project “T-Shirt” Sizing

Small Project

- Duration: 4 weeks min.
- Labor Hours: ≥ 160 hrs
- Minimal integration with other business units/departments
- Risk/Complexity: Low

Medium Project

- Duration: 6 -12 months
- Labor Hours: 1000 hrs +
- Moderate integration with other business units/departments
- Risk/Complexity: Medium to Medium-High

Large Project

- Duration: >12 months
- Labor Hours: 2000 hrs+
- Significant integration with other business units/departments
- Risk/Complexity: Medium-High to High

4 Project Lifecycle Phases

INITIATION	PLANNING	EXECUTION & CONTROL	CLOSEOUT
<ul style="list-style-type: none"> • Project concept created and approved • Project and the project manager are named in the charter • Project charter approval indicates all interested parties agree on the project goals 	<ul style="list-style-type: none"> • Details of how to execute the project are built out • Change management strategy defined • Project schedule created • Develop communication plan • Identify dependencies • Host project kickoff 	<ul style="list-style-type: none"> • Perform the actual work outlined in the project schedule • 90% or more of the project's effort occurs here • Manage communications and stakeholder engagement • Assess project against schedule • Document and monitor risks • Evaluate and calculate KPIs 	<ul style="list-style-type: none"> • Transition to operations • Complete project documentation & archive • Lessons Learned - review successes and failures to improve future projects • Formal Acceptance

Let's look at an example of a Client Services project schedule with phases...

Project Risks

- **Risk:** PMI defines a risk as “an uncertain event or condition that, if it occurs, has a positive or negative effect on a project's objectives”.
 - Recommend using the if —and —then statement when documenting risks.

For example, If X happens —then the result will be Y.

Project Issues

- **Issue:** An event or condition that has *already* happened and has impacted or is currently impacting the project objectives.
 - Example: *Delays in setting up the development and test environments are impacting the overall project schedule.*

Basic Tools & Techniques

- Identify and track risks, issues & action items
- Utilize Meeting Management techniques
- Effective Task Management is key!
- Weekly Status reporting
- PM Tools – Smartsheet is the tool for project schedules & may be used for project logs
- Leverage Project Templates (forthcoming)

IT Work Requests



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What are IT Work Requests?

- SOMTech IT Work Requests are all ad-hoc requests (i.e. non-Help Desk tickets) submitted by customers/stakeholders of each SOMTech unit.
- MOU recently signed with Central TS to use Cherwell as the “front door” intake tool for all SOMTech IT work requests.
- Currently Application Services intake form is being implemented in Cherwell (in the SOM portal).
- SOM IT Steering Committee has oversight of the Application Services unit’s portfolio of ad hoc requests; dashboard reports will be developed to enable monitoring, analysis and decisioning (including prioritization).
- After Application Services intake process is implemented other SOMTech units will follow with their intake forms in SOM portal on Cherwell.

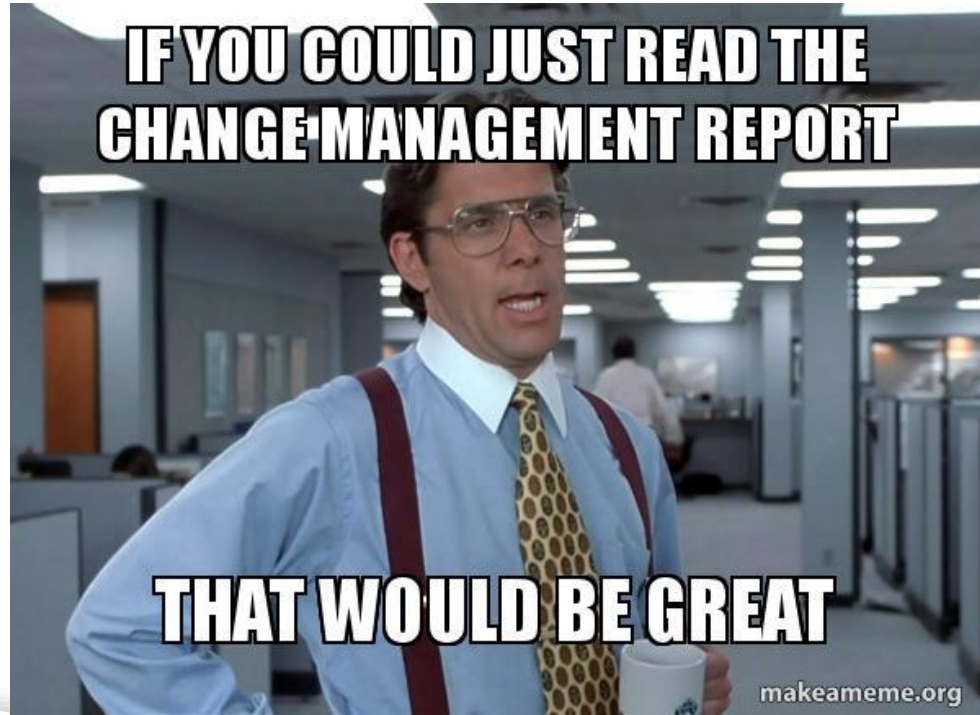
Scope of SOM IT Work Requests vs. Help Desk Tickets

IT WORK REQUESTS	IT HELP DESK TICKETS
AS Systems support/maintenance	Desktop/Laptop/Printers/Software support
AS Systems enhancements	Hardware & Devices
Data extracts	Email, Digital Signage, File Sharing & Storage
New Reports or Modifications to existing reports	IT Security
New Projects	Network/Connectivity
AV Classroom Support	Servers, Storage & Data Management
SIM Center Support	SOM Website Updates
Web Development & Hosting	

Change Management



Change Management



What is Change Management?

ITIL Change Management	Project Change Management	Prosci® Change Management
<ul style="list-style-type: none">• Designed to help control the life cycle of strategic, tactical, and operational changes to IT services through standardized procedures.• Goal of Change Management is to control risk and minimize disruption to associated IT services and business operations.	<ul style="list-style-type: none">• The change control system to manage modifications to any formally controlled deliverable, project management plan component, or project document.	<ul style="list-style-type: none">• Prosci® is change management methodology implemented at VCU Health.• The application of a structured process and set of tools for leading the people side of change to achieve a desired outcome (i.e. the people side of system, process and organizational changes).

Conclusion/Wrap Up



Recap Key Benefits of Project & Change Management

- ✓ Improved project/work request delivery
- ✓ Improved risk management
- ✓ Increased productivity & accountability
- ✓ Coordination of resources & prioritization
- ✓ Provide audit trail of changes

Conclusion/Wrap Up

- Any further questions?
- This presentation will be available on the SOMTech PMO Teams site

Thank you for participating!