

# Solving the Project Management Equation: *People + Process + Tools*

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# Time To Fly... Paper Airplanes

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- Form your team
- 2 minutes to research designs
- 2 minutes to fold your plane
- Select 1 pilot
- Furthest Distance in the AIR wins

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# What is Project Management?

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- Project Management is the application of skills, knowledge, tools and techniques to meet the needs and expectations of stakeholders for a project
- The purpose of project management is **prediction** and **prevention**, NOT recognition and reaction

# The Value of Project Management

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- Establishes **control** and **accountability**
- Provides a conduit for **communication**
- Improves **on-time** delivery
- Manages **cost**
- Mitigates **risk**

# Why Use Project Management?



# The Human Factor: People

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- Emotions vs. logic
- Nurture relationships
- Develop the project team to improve effectiveness
- Guiding change and transition

# Project Manager Responsibilities

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- Collaborative leadership
- Detailed planning
- Resolve conflict
- Manage expectations
- Communicate, Communicate, Communicate

# Communication Best Practices

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Be Transparent

Be Engaged

Proofread

80/20 Rule



# Develop and Follow a Process

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- 5 Project Management phases
- Use **SIMPLE, REPEATABLE** methods
- Find balance between efficiency and effectiveness
- Use **TEMPLATES**
  - Schedule
  - Budget
  - Risk Log
  - Status Reports

# Status Reports

## EJC INFUSION CENTER RENOVATION - IT STATUS UPDATE 10/25/13

### Highlights:

- 90% of structured cabling has been pulled

### Issues/Risks:

- CATV Cabling – TV specs were delivered late and coax pulled did not meet spec. PDI TV order has been changed to allow for existing coax to remain in place as is. **RESOLVED**
- Comcast scheduling – Delay getting correct Comcast resource located to complete site survey.
- UTS Engineer availability – Zack will be out of office on training the week of Oct 28-Nov 6. He feels this will not impact installation or configuration of the switch expansion module.
- Move-in resource change – Local EJC IT is now responsible for ordering telecom equipment and completing all voice/data move-in activities.

**Schedule:** Here is a snapshot of the schedule for the current phase of the project.

Project Schedule: Johns Creek Infusion Center Renovation					
Task	Resource	Start	Finish	% Complete	Notes
INITIATION					
PLANNING					
Provide Network Electronics Requirements	ZW	9/13/13	10/1/13	100%	
Determine WAP Locations	NB	9/13/13	9/27/13	100%	
Provide Wireless Requirements	NB	9/13/13	10/1/13	100%	
Review network design and budget input to Project Manager	ZW	9/13/13	10/1/13	100%	

# Manage Your Time

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- Poor time management = stress
- Failing to plan is planning to fail
- Sort to-do lists by importance
- Break tasks down into smaller tasks
- Do the hardest thing first

# Project Management Tools

As simple as an **Excel spreadsheet**

Project Schedule: PCI-Net Implementation						
Task	Resource	Duration	Start	Finish	% Complete	Notes
<b>INSTALLATION &amp; TESTING</b>		<b>10 weeks</b>	<b>3/15/13</b>	<b>6/28/13</b>	<b>28%</b>	
Complete LAN prep for all 4 campuses	Net	4 weeks	3/15/13	4/15/13	50%	
Set up WinPrism accounts for Jackie and Marsha	JT	1 day	4/29/13	4/29/13	50%	
Install barcode printers in Gainesville and Oconee	BW, MR, PD	1 Week	4/29/13	5/3/13	0%	
Build multi-campus VPN in Dahlenega sandbox	CA, JR	1 week	5/6/13	5/10/13	100%	*Milestone #2
Test multi-point VPN in sandbox	CA, JR	1 week	5/6/13	5/10/13	75%	
Security Testing	AB, BM	3 days	5/8/13	5/10/13	0%	
<b>CLOSE-OUT</b>		<b>2 weeks</b>	<b>7/1/13</b>	<b>7/15/13</b>	<b>0%</b>	
Early life support for new PCI-Net	Net, Server	2 weeks	7/1/13	7/15/13	0%	
Finalize all design, trouble shooting, and escalation docs	Net, Server, Neb	1 day	7/1/13	7/1/13	0%	
Train Service Desk on PCI-Net support	TBD	1 day	TBD	TBD	0%	
Handoff to standard support procedures	All	1 day	7/15/13	7/15/13	0%	*Milestone #5
Green = Complete						
Yellow = late but not impacting schedule						
Red = late and a schedule risk						

# Project Management Tools

## Or as complex as Microsoft Project

Task Name	Duration	Start	Finish	Resource Names	% Complete	Work	Predecessors
ServiceNow_Implementation_Schedule_V3	126 days?	Fri 3/1/13	Tue 9/3/13		21%	626.8 hrs	
1 Complete ServiceNow Purchase	2 wks	Fri 3/1/13	Thu 3/14/13	Steve McLeod[50%],Purchasin	100%	4 hrs	
3 Select implementation partner	2 wks	Fri 3/29/13	Thu 4/11/13	Steve McLeod	100%	4 hrs	1
4 Select prof. services package	2 wks	Fri 3/29/13	Thu 4/11/13	Steve McLeod,Mike Geraghty[	100%	4 hrs	
2 Receive ServiceNow dev environment	1 day	Fri 4/5/13	Fri 4/5/13	Tom Alday	100%	1 hr	1
7 Select project team	1 day	Wed 4/10/13	Wed 4/10/13	Steve McLeod,Mike Geraghty,	100%	32 hrs	
5 Receive prof. services purchase approval	1 day	Fri 4/12/13	Fri 4/12/13	Steve McLeod	100%	8 hrs	
6 Complete prof. services purchase	1 day	Mon 4/15/13	Mon 4/15/13	Steve McLeod,Purchasing	100%	16 hrs	
9 Receive implementation documentation	1 day	Mon 4/22/13	Mon 4/22/13	Tom Alday	100%	1 hr	
11 Complete field mapping document	2 wks	Mon 4/22/13	Fri 5/3/13	Tom Alday,Katrena Hook[25%]	10%	56 hrs	
10 Schedule prof services work	1 day	Wed 4/24/13	Wed 4/24/13	Steve McLeod	0%	2 hrs	
8 Select process managers	1 wk	Thu 4/25/13	Wed 5/1/13	Steve McLeod,Wally Beck,Hale	35%	2 hrs	7
12 Review current Incident process	1 day	Wed 5/1/13	Wed 5/1/13	Steve McLeod,Mike Geraghty,	0%	1 hr	
14 Attend ServiceNow training	1 wk	Mon 5/13/13	Fri 5/17/13	Tom Alday	0%	24 hrs	
15 Collect existing knowledge articles	2 wks?	Mon 5/20/13	Mon 6/3/13	Tom Alday[50%],Wally Beck[5	0%	16 hrs	
18 Techport 13 instant-on	0 days	Fri 5/24/13	Fri 5/24/13	Techport 13	0%	120 hrs	
18.1 Integrate AD	1 day?	Fri 5/24/13	Fri 5/24/13	Techport 13	0%	8 hrs	
18.2 Configure Incident Management	4 days	Tue 5/28/13	Fri 5/31/13	Techport 13	0%	32 hrs	19
18.3 Configure Problem Management	1 wk?	Mon 6/3/13	Fri 6/7/13	Techport 13	0%	40 hrs	20
18.4 Configure Knowledge Management	1 wk?	Mon 6/10/13	Fri 6/14/13	Techport 13	0%	40 hrs	21

# Free Project Management Software

	Free users	Free projects/ project workspaces	Free storage	Cost to upgrade	Work management	Project planning (Define scope, timeline, resources)
 Airtable	1 user, Unlimited collaborators	Unlimited bases, 1200 records per base	2GB/base	\$12/user/month	✓	
 avaza	1 user, Unlimited collaborators	5 projects, unlimited archived projects	100MB	\$9.95/user/month	✓	✓
 backlog	10	1	100MB, one 5MB attach. per issue	\$20/month (up to 30 users)	✓	
 clickup	Unlimited	Unlimited	100MB	\$9/user/month	✓	
 Flowlu	2	1	1GB	\$39/month (up to 5 users)	✓	✓
 freedcamp	Unlimited	Unlimited	Unlimited, 10MB upload	\$2.49/user/month	✓	
 task	Unlimited	Unlimited	Unlimited, 20MB attachment	\$8.25/user/month	✓	
 paymo	1	Unlimited	1GB	\$11.95/user/month	✓	✓
 STREAMTIME	Unlimited	5 active jobs	50 archived jobs	\$15/user/month	✓	✓
 teamwork Projects	5	2	100MB	\$11.25/user/month (min. of 5 users)	✓	✓

 Capterra

# Mistakes to Avoid

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Scope creep

Poor requirements gathering

Poor communication

Lack of stakeholder commitment

Unrealistic planning and scheduling

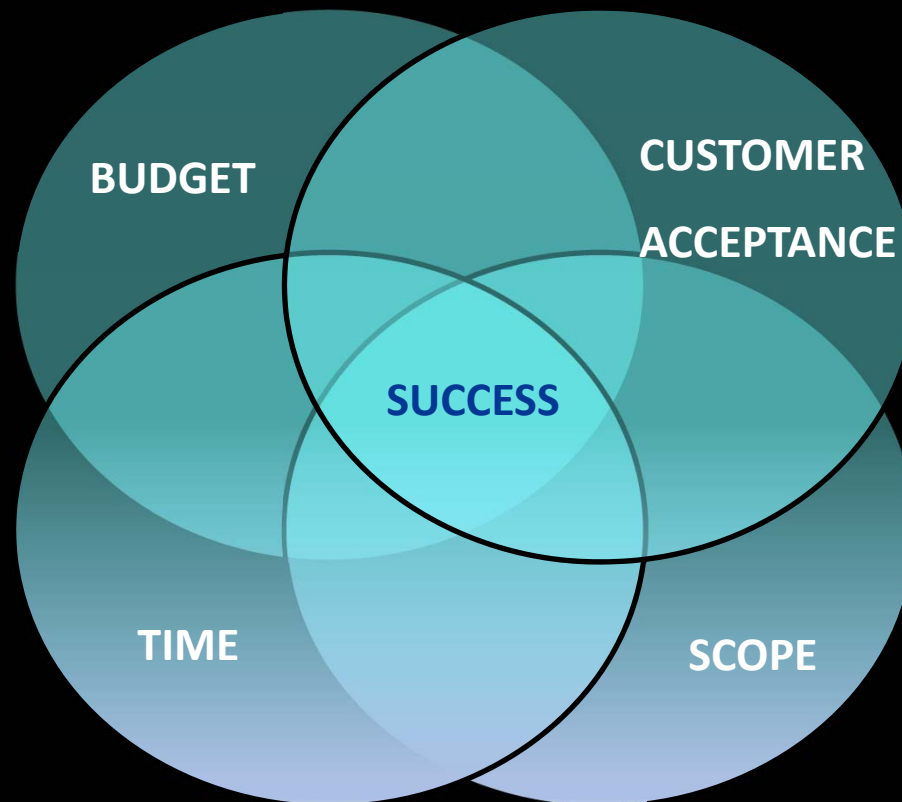
Not managing risk or issues



# Project Success = Happy Customer

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Occurs when the agreed upon **objectives** have been delivered within the expected **budget** and **timeframe**





Most important...

Take initiative and get it done!