

LEANOhio

GREEN BELT

Transforming the Public Sector

Project Management for Green Belts

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The importance of planning and follow-up

Project failure occurs as a result of:

- Unclear understanding of scope of project
- Not enough resources/time committed
- Unclear project expectations
- Unclear expected outcomes
- Vague project timeline
- No management

Good planning and follow-up helps ensure a successful project

#1

Project Manager Responsibilities & Characteristics

Characteristics of a Project Manager

- Inclusive
- Emotionally Intelligence
- Ability to set clear goals/expectations
- Organized
- Communicates effectively
- Taps into team members strengths
- Asks for help
- Cheerleader

Project Manager Responsibilities

- Ensures project scope and objectives are clear
- Defines expected timelines
- Uses resources efficiently
- Identifies problem areas and risk
- Improves communication
- Tracks and reports projected benefits
- Monitors the project
- Takes overall responsibility for coordinating

#2

Project Management Phases

5 Phases of a Project

1. Initiation

- understanding the goal, general expectation of the customer, project scope, resources (team members), project charter

2. Planning

- refining the scope, identifying and sequencing activities to meet schedule, developing a workable schedule

3. Executing

- leading the team, communicating to stakeholders, fire fighting, implementing change

4. Controlling

- monitoring deviation from plan, taking corrective action, evaluating project changes

5. Closing

- shutting project down, celebrating project results, recording lessons learned, reviewing project outcomes, submitting results to LeanOhio scorecard

#3

Project Management Fundamentals

The Formal Kickoff Meeting

- Introduce team members
- Review Project Charter, goals and objectives
- Establish meeting model
 - Review plans, priorities and schedules
 - Assign roles, responsibilities and next steps
- Schedule regular project meetings to ensure the project stays on track

Sponsor(s) should attend the Kickoff Meeting

Tips for Running Meetings

- Create an Agenda
- Create Minutes
- Document Decisions
- Start and end on time
- Don't meet unless needed

#4

Project Management Tools

Prioritization Matrices

Used when multiple options create competing priorities. The tool helps determine priorities, considering various factors and assists in focusing resources.

Project Title				
Criteria:	H	M	L	Score
Impact on customer satisfaction <i>Affects customer - 9: Directly 3: Indirectly 1: No Affect</i>	9	3	1	
Impact on Business <i>Affects site Business Y - 9: Directly 3: Indirectly 1: No Affect</i>	9	3	1	
Impact on improving Employee Value <i>Affects employee value- 9: Directly 3: Indirectly 1: No Affect</i>	9	3	1	
Value added to Agency <i>9: >\$100K 3: \$50K - 100K 1: <\$50K</i>	9	3	1	
Leveragability <i>9: >5 projects 3: 2-5 projects 1:<2 projects</i>	9	3	1	
Feasibility <i>9: High 3: Medium 1: low</i>	9	3	1	
Resources <i>Measurement system & data availability 9: Available now 3: within 60 days 1: > 60 days</i>	9	3	1	

Action Register

WHAT?	WHO?	WHEN?
E-mail Initial Draft of Work Breakdown Schedule (WBS) to team	Mugsy	8/28/2015
Review the WBS and provide additions/deletions/corrections to gain team consensus.	Team	8/31/2015
Complete initial development to the point that we can enter the pilot (OITS) data.	Rob/Jen	9/8/2015
Create a "print form" feature that lists all the options as well as the selected item	Rob	9/11/2015
Decide on the "game plan" for entering OITS employees' data into the new system.	Jen/Mugsy/Rob	9/8/2015
Communicate the "game plan" to OITS employees.	Jen/Mugsy	9/11/2015
Begin entering OITS data into new role application according to "game plan".	Jen/Mugsy	9/16/2015
Developer and Admin Support "adjustments" based on pilot	Rob/Jen/Mugsy	10/14/2015
Complete entering OITS data into new role application	Jen/Mugsy	11/16/2015

Communications & Training Plan

Message	Audience	What	Responsible Party	When/Where
The New Role Management Process/Application is now LIVE!	Top Senior Leadership	Inform ODI Senior Management of new Role Management Process	Tina	In her weekly 1-on-1 meeting with CAO after successful conclusion of pilot
The New Role Management Process/Application is now LIVE!	Asst Directors; Chiefs	Inform ODI Management of new Role Management Process	Tina/Jeff	In the AD/Chief monthly meeting after successful conclusion of pilot
The New Role Management Process/Application is now LIVE!	Information Stewards	Train Information Stewards on the new Role Management Process	Jen (Mugsy will assist if needed)	In the Info Steward monthly meeting after successful conclusion of pilot

Select Team Members

R

Who is Responsible

The team members assigned to do the work

A

Who is Accountable

The person who makes the final decision and has the ultimate ownership

C

Who is Consulted

Subject matter experts who are consulted before action is taken

I

Who is Informed

Those who need to stay informed of process changes resulting from project

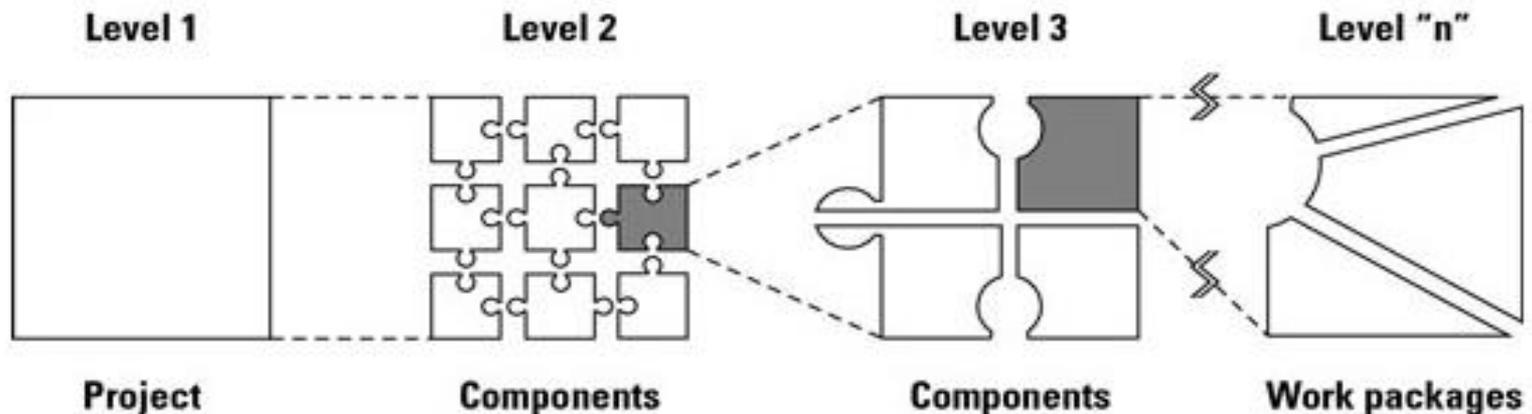
Consider Constraints and Risks

- Constraints and Risks are a Major Factor
- Project Constraints/ Risks
 - Anticipated – bad work issues, departure of team member, environment
 - Unexpected mid-project – disasters, hurricane, tsunami, unqualified resource
 - Poor planning or lack of support
- Be willing to be flexible
- Conduct a FMEA

FMEA: Project Risks

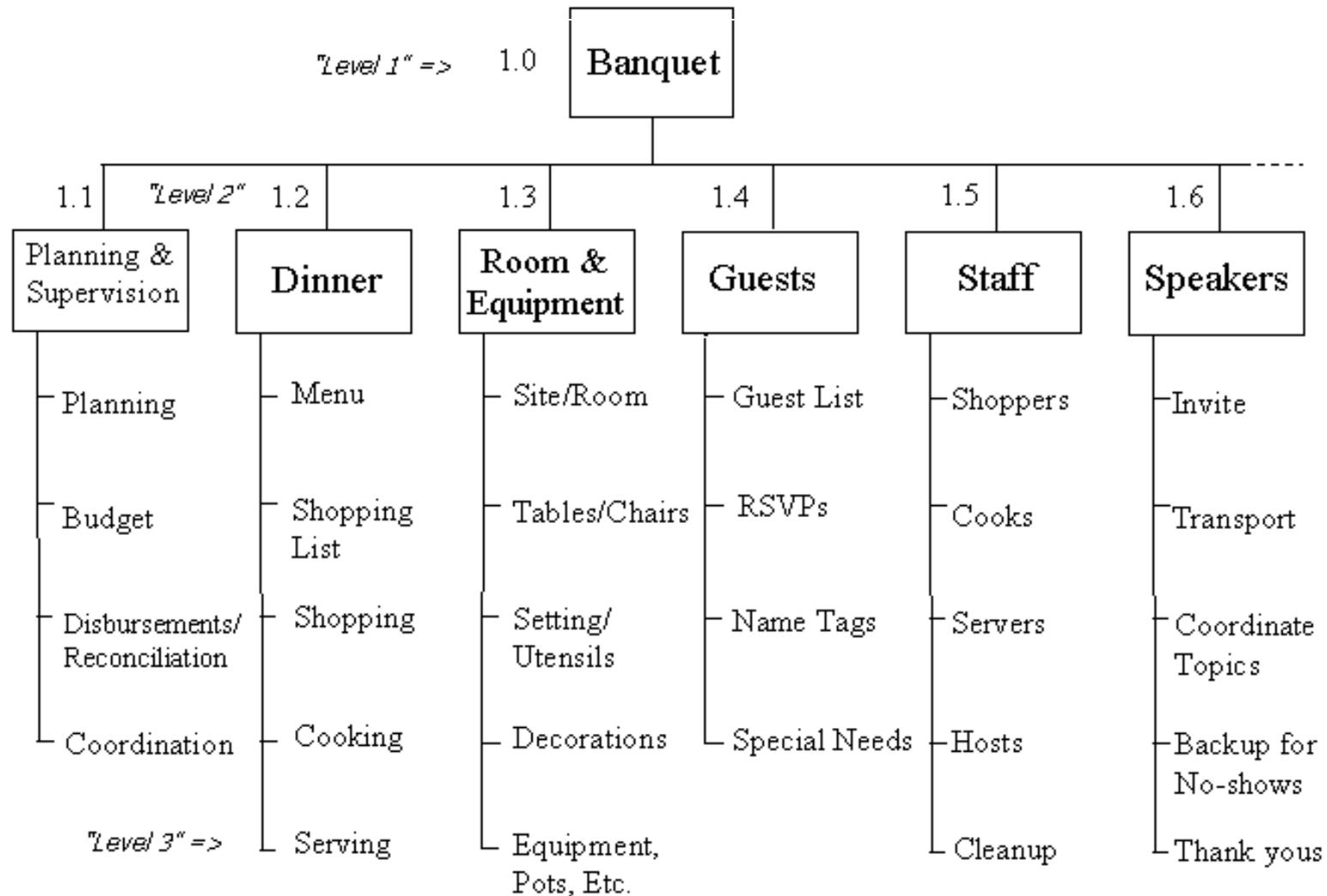
Project Risk	<u>S</u> everity Rated 1-10 with 10 being most severe	<u>O</u> ccurrence Rated 1-10 with 10 being highest probability of occurrence	<u>D</u> etection Rated 1-10 with 10 being lowest probability of detection	RPN (Risk Priority Number) S x O x D	Action
Resource commitment too low (Rob/Jen get told to switch to another higher priority emergency project)					
Service Desk tickets don't generate properly (OITS staff get confused & start to complain)					
Information Stewards don't show up to get trained and/or don't start using the new system (New employee's don't get on-boarded as quickly; existing employee's don't get access as quickly)					
The new system works for the OITS pilot, but breaks in subsequent sprints for other divisions (Makes OITS look bad and causes strain for OITS mgmt)					
OITS staff members don't complete the work to remove and/or add access levels to match exactly with the employee's role (This would be revealed in random ODI audits or audits by OBM or the Auditor of State)					

Work Breakdown Structures



A Work Breakdown Structure is a hierarchical chart that divides the project into manageable tasks

WBS Example: Banquet

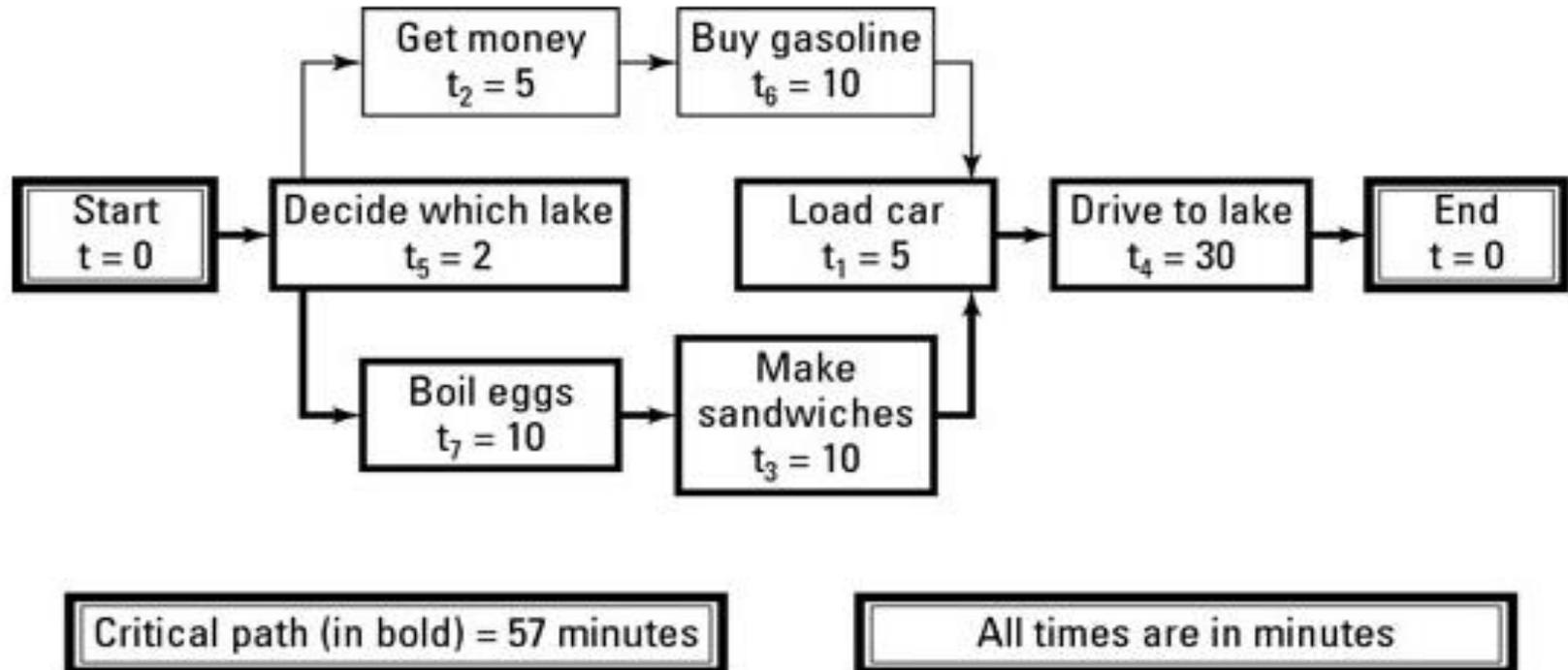


Create your own WBS

Consider getting ready for work in the morning....

- What are your key deliverables to get you out the door?
- What does it take to achieve those deliverables?

Network Diagrams



Completed picnic-at-the-lake network diagram.

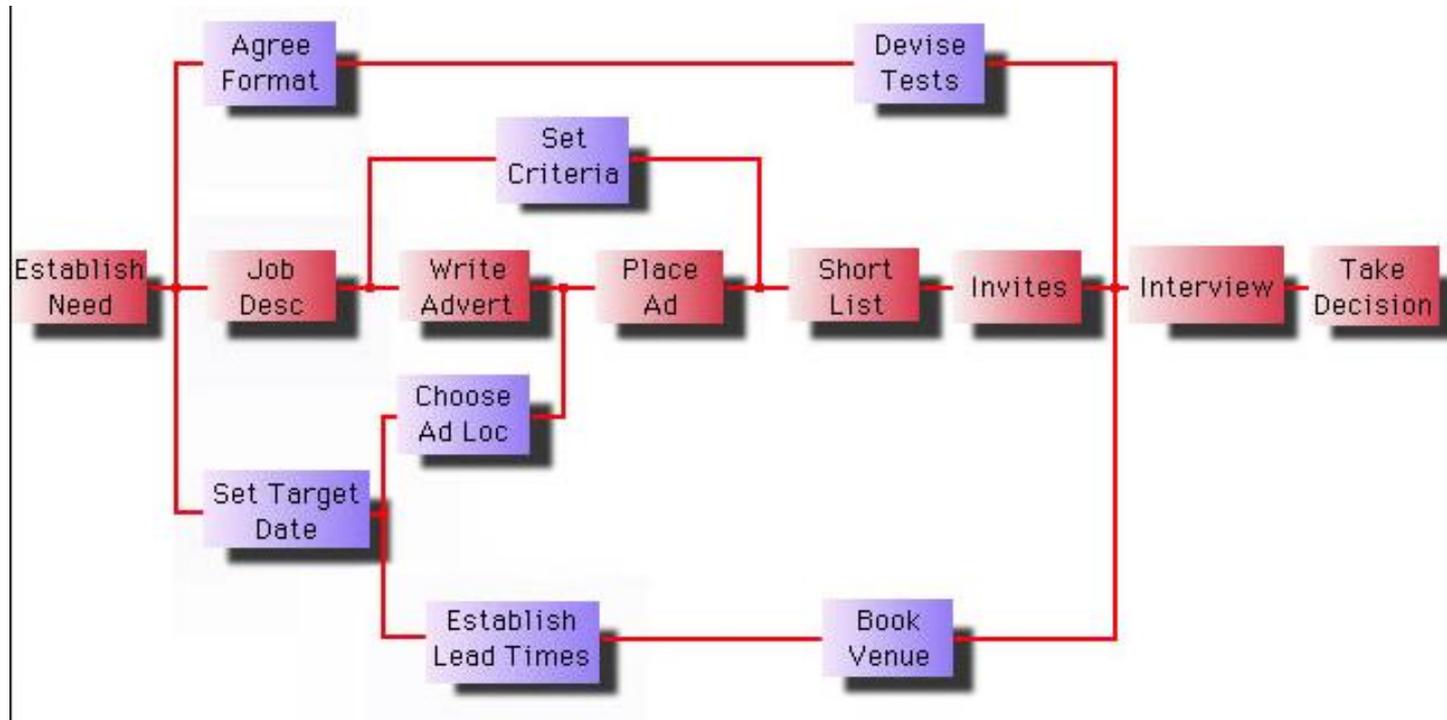
A Network Diagram is a logical representation of tasks that defines the sequence of the work in a project.

Create your own Network Diagram

Using your WBS for getting ready for work in the morning.....

- Create a network diagram
 - Are there tasks that can be completed simultaneously?
 - How long does each major task take?

Identify the Critical Path



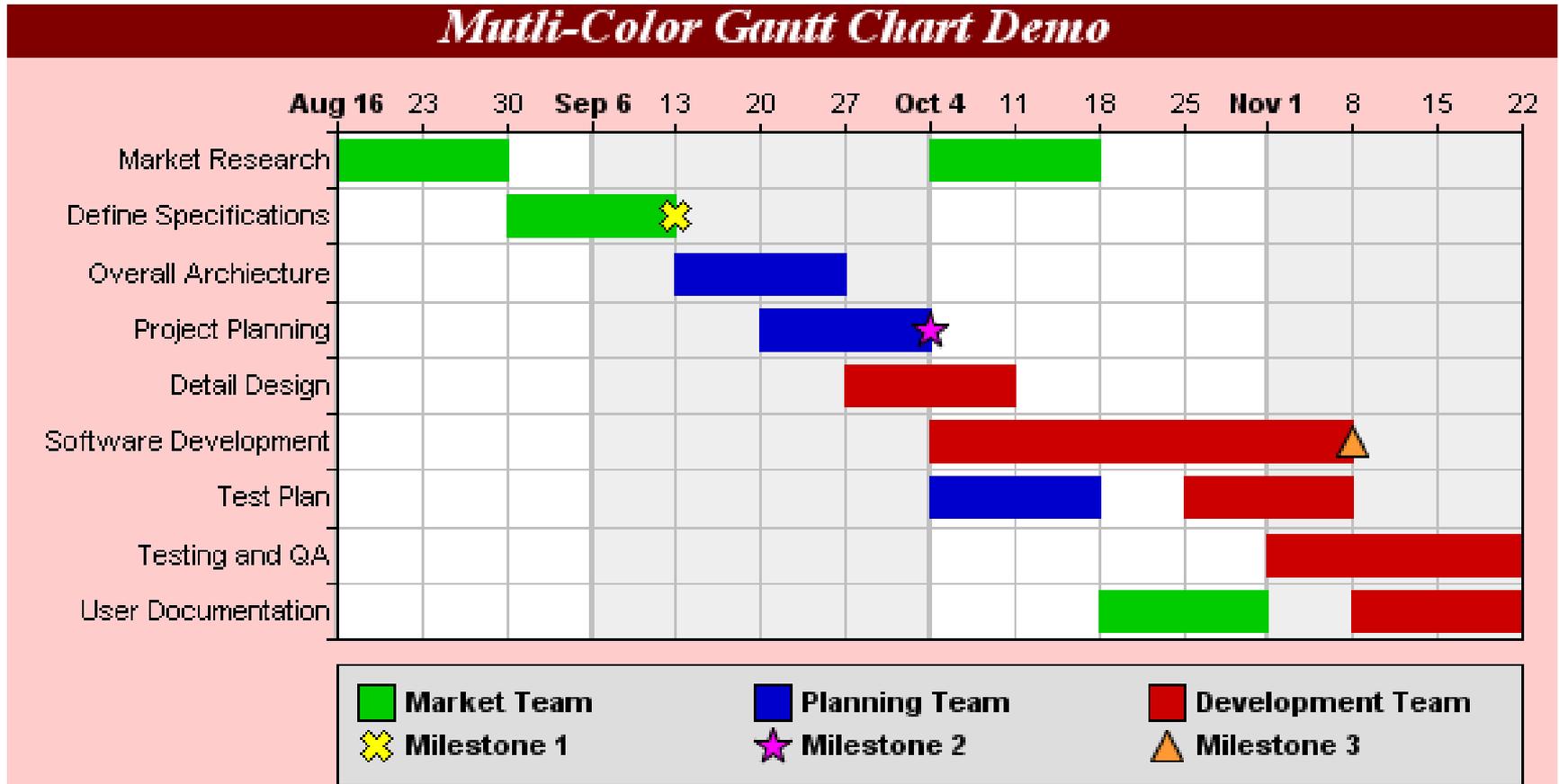
The Critical Path is the longest path through the network diagram. If this path is delayed, the entire project is delayed.

Identify the critical path

Using your Network Diagram

- Estimate the duration of each task
- What is your critical path?

Gantt Charts



A Gantt Chart is a visual overview of project timelines, including the critical path.

#5

Closing the Project

Closing

- Project is done when all action registers are complete
- Conduct final accounting (enter information into scorecard)
- Assemble final documentation
- Celebrate and communicate your success
- Document lessons learned (post-mortem or debrief)

Document the Project and Results

2016 OITS PROJECTS (as of 1/31/16): Scheduled Completion Date ~ Named Impediment ~ Missed Completion Date

PROJECT	TEAM	TRACKED BY:	MAIN RESOURCES as of PRINT DATE:	START DATE:	COMPLETE TO TASKS: (Note: Tasks are assigned and tracked on a separate sheet)	TOTAL TASKS as of PRINT DATE:	% COMPLETE as of PRINT DATE:	JAN 2016	FEB 2016	MAR 2016	APR 2016	MAY 2016	JUN 2016	JUL 2016	AUG 2016	SEP 2016	OCT 2016	NOV 2016	DEC 2016	FUTURE MONTH/ YEAR COMPLETE DATE
1	Telecom	Leanne	Leanne	10/15	Short duration project (NBS not required)	0	0.00%													
2	OITS Teams	Magdy	All OITS Team Members		All OITS team members will be equipped and activated	0	0.00%													
3	Role Mgmt					83.33%	83.33%													
4						50.00%	50.00%													
5						50.00%	50.00%													
6						50.00%	50.00%													
7						50.00%	50.00%													
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49						50.00%	50.00%													
50						50.00%	50.00%													

Create a repository for project documents and document lessons learned!

Leverage Opportunities

- Did you find other broken processes?
- Can you take what you learned and apply it in other parts of the business?
 - Communicate to Process Owner
 - Draft charters

Conclusion

- Plan your project
 - Be realistic and set SMART goals
 - A good foundation (plan) is essential
- Involve your team
 - Use good communication skills to stay current on project progress
- Use project management tools
- Close the deal

Will the last one out please turn off the lights!

LEAN **Ohio**

Questions