Project Management Advisor

Playbook Covering the Bases to Help Your Next Project be a Winner

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UW- Madison Div of Information Technology

Presentation is a WIP

- Stay Tuned

Successful Projects

- Clear Objectives
- Adequate Resources
- Care Planning
- Well-defined Roles
- Teamwork & More

Project Challenges Include

- Effective Communication
- Hidden Requirements
- Scope Creep
- Constrained Resources
- Unpleasant Surprises

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Introductions

- DoIT (Division of Information Technology)
- DFM (Dept of Family Medicine)
- PMA (Project Management Advisor)
- Oracle Upgrade Project

Oracle 11i Upgrade Project

featuring

Project Management Advisor

Now Showing
NCOAUG
August 17, 2007

Directed by
John Schmitz
UW Madison DoIT

DoIT

- Central Campus IT Shop
- 700 full-time and student employees
- 55,000 UW-Madison faculty, staff and students
- Large Data Center
- Offer: Store, Help Desk, Training
- Use E-Biz Financials, SCM, & Projects

University of Wisconsin Department of Family Medicine

- Dept of UW Medical School
- Approx 30 clinics
- 500 FTE's
- $55m revenue
- 300k patient visits
- Oracle GL customer

Activities

1. Define scope
2. Define requirements
3. Identify high-level roles
4. Develop high-level milestones/timeline
5. Develop high-level budget
6. Identify high-level control strategies
7. Finalize Project Charter & gain approvals

Deliverable:

A Project Charter (finalized & approved)

Evaluate lessons learned

What it is | How to | Templates / Examples

What it is: Define Requirements

Description
Defining requirements specifies the capabilities, features or attributes of the project's deliverables. Stakeholder needs, wants and wishes are analyzed to derive the requirements. Requirements are prioritized to determine which requirements will be included and excluded from the project.

Rationale/Purpose
Defining requirements specifies the capabilities, features or attributes of the project's deliverables. Stakeholder needs, wants and wishes are analyzed to derive the requirements. Requirements are prioritized to determine which requirements will be included and excluded from the project.

- Establish consensus and common ground among project stakeholders and participants
- Form the basis for project deliverables
- Ensure the customer receives a product or service with the functionality requested
- Define stakeholder expectations as specific results
- Set the stage for effective project planning

Who is involved
Project Manager
Project Sponsor
Project Stakeholders
Project Customer

11i Project Overview

- Goal
  - Upgrade aging 10.7 GL system
- Resources
  - 6 experienced individuals, 6 months, $100,000
- Vision
  - Re-implement, reconfigure, and cleanup system
- Challenges

My PMA Objectives

- Expert, standard, endorsed project templates
- Objective expert advice on demand
- Maximum project flexibility
- Roadmap

DoIT Management PMA Goals

- Support DoIT Project Management Initiative
  - Real Life Feedback
  - Experiment with mentor model
- Improved budget estimates
- Higher confidence project on time and within budget
- Well managed project

PMA Overview/Demo

Activities

1. Define project mission and vision
2. Establish strategic alignment
3. Identify stakeholders
4. Define high level business requirements
5. Determine feasibility
6. Develop business case

Deliverable:

A Project Proposal (finalized & approved)

Evaluate lessons learned

Overview

- Produces a Project Proposal to create a product or service.
- Determines the feasibility of the proposed solution.
- Determines the project's alignment with the organization's mission and goals.
- Establishes a business case to justify the project.
- Approves the project to advance to the Initiate Stage.

Under Construction - Target date to be determined

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Updated June 1, 2006 - v1.1

Conceptualize Phase

- DFM Project Experience
- Issues
- Lessons Learned
- Key Deliverables

Activities

1. Define scope
2. Define requirements
3. Identify high-level roles
4. Develop high-level milestones/timeline
5. Develop high-level budget
6. Identify high-level control strategies
- Communications strategy
- Quality management strategy
- Issue Management Strategy
- Change Management Strategy
- Risk Management Strategy
- Procurement Strategy

7. Finalize Project Charter & gain approvals

Deliverable:

A Project Charter (finalized & approved)

Evaluate lessons learned

What it is | How to | Templates / Examples

What it is: Define Scope

Description
Defining the scope of a project develops a common understanding of what is included in and excluded from the project. The scope builds upon the project concept developed in the Conceptualize Stage.

Scope is usually defined by:

- Project Business Need
- Project Goals
- Product Description
- Project Customer, Project Sponsor, Project Manager
- Project in Scope, Out of Scope
- Project Critical Success Factors
- Project Assumptions
- Project Constraints
- Project Deliverables

Rationale/Purpose
Defining a project's scope helps establish a common understanding for all project stakeholders. It is the foundation on which the schedule, budget and staffing plans are built.

Scope also serves as the basis for future project decisions. The documented scope helps address "scope creep" by making changes obvious.

Who is involved
Project Manager
Project Sponsor
Project Stakeholders
Customers

Result
This information is included in a separate section of your project charter often referred to as "Project Scope".

Initial Project Assessment

- Situation
  - Obsolete, Unsupported Software
- Strengths
  - Experienced Technologists
  - Positive Relationship/Track Record
- Challenges

Initiate Phase

- DFM Project Experience
- Lessons Learned
- Key Deliverables

Project Name	DFM Oracle 11i Upgrade
Project Manager	John Schmitz, DoIT
Sponsor	Steve Hall, DFM
Customer	Department of Family Medicine (DFM)
Document Version and Date	Version 2.0 – 02/02/06

Project Scope	
Background & Business Need	DFM, a department of the UW Medical School, operates patient care clinics across Wisconsin. They acquired Oracle Applications General Ledger (GL) version 10.7 in 1998 via a cooperative arrangement with DoIT. DFM's version of Oracle Financials (now called the E-Business Suite) and much of the underlying architecture has been de-supported by Oracle. DoIT staff feel they can no longer guarantee system operational integrity. DoIT and DFM staff met in the fall of 2004 and tentatively decided to follow DoIT's planned upgrade to the latest Oracle release. DoIT upgraded to Oracle E-Business Suite 11.5.10.2 in January, 2006.
Project Goals	- Move to Oracle supported, manageable, and more state-of-the-art database, tools, and overall technical environment. - Move to a supported server platform. - Upgrade, at a minimum, to the Oracle GL version used by DoIT. - Convert from existing system while maintaining needed functionality and retaining desired data. - Use an implementation approach that minimizes loss of system availability. - Upgrade with minimal enhancements to existing functionality beyond included features to reduce project costs and risks. - Move off the existing DFM production servers in a timely manner.

Areas I may not have formally addressed without PMA

- Project Team Roles
- Acceptance Criteria
- Critical Success Factors
- Project Assumptions

Areas I may not have formally addressed without PMA

- Communication Strategy
- Quality Strategy
- Approval Signatures
- Definitions

Activities

1. Hold Project Kick-Off Meeting
2. Develop work plan
- Develop work breakdown structure (WBS)
- Develop project staffing plan
- Develop project schedule
- Develop project budget

3. Develop project control plan
- Communications plan
- Quality management plan
- Issue Management Plan
- Change Management Plan
- Risk Management Plan
- Procurement Plan
- Support Transition Plan

4. Finalize Project Plan and gain approvals

Deliverable:

A Project Plan (finalized & approved)

What it is: Hold Project Kick-Off Meeting

Description
The Project Kickoff Meeting formally recognizes the start of the project. The project manager uses this meeting to communicate a shared view of the project to ensure understanding of the approved project charter and to clarify next steps involved in producing the Planning Stage deliverables.

Rationale/Purpose
The Project Kickoff Meeting provides an opportunity for the following:

- Introduce Official Sponsor(s) and Project Manager
- Introduce Key Customers and Stakeholders
- Review Project Scope, Definition and Objectives
- Review High-level Timeline & Milestones, Roles, and Budget
- Review Deliverables
- Review Challenges
- Explain Next Steps

This meeting allows the Sponsor(s) to relay commitment to the project's outcomes. It provides an opportunity for the Project Manager to review the approved project charter, answer any questions to ensure understanding, and explain the next steps contributing to development of a Work Plan and Control Plan in order to finalize the Project Plan. Including Stakeholders in this meeting builds communication and coordination, making project success more likely.

Who is Involved
Project Manager
Project Sponsor(s)
Project Stakeholders

Result
The Project Kickoff Meeting ensures that all Stakeholders are familiar with and share a common understanding of the approved Project Charter and that they are aware of the next steps to complete the project Work Plan and Control Plan. The more complete the resulting plans, the more likely project implementation will progress efficiently and effectively.

Planning Phase

- DFM Project Experience
  - Customize PMA project plan template
  - Prepare for 2 implementation schedules
- Lessons Learned
- Key Deliverables

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DFM Oracle 11i Upgrade

Project Plan

Prepared for: Department of Family Medicine (DFM)

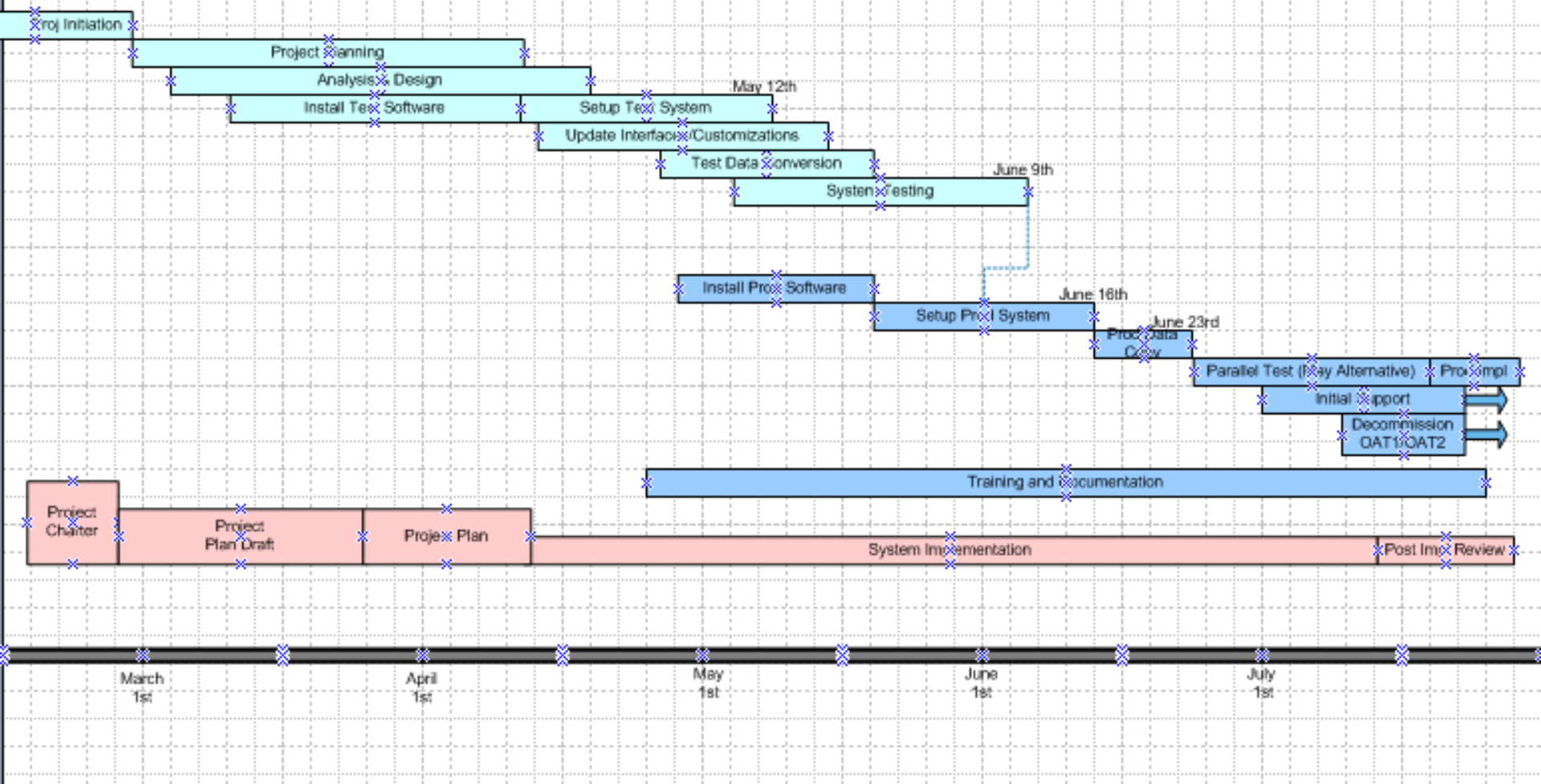
Prepared by DoIT Project Team:
Carol Koehler - Consultant
Carrie Roesch - DBA
John Schmitz - Project Manager

Date: April 21, 2006

DIVISION OF INFORMATION TECHNOLOGY
DoIT

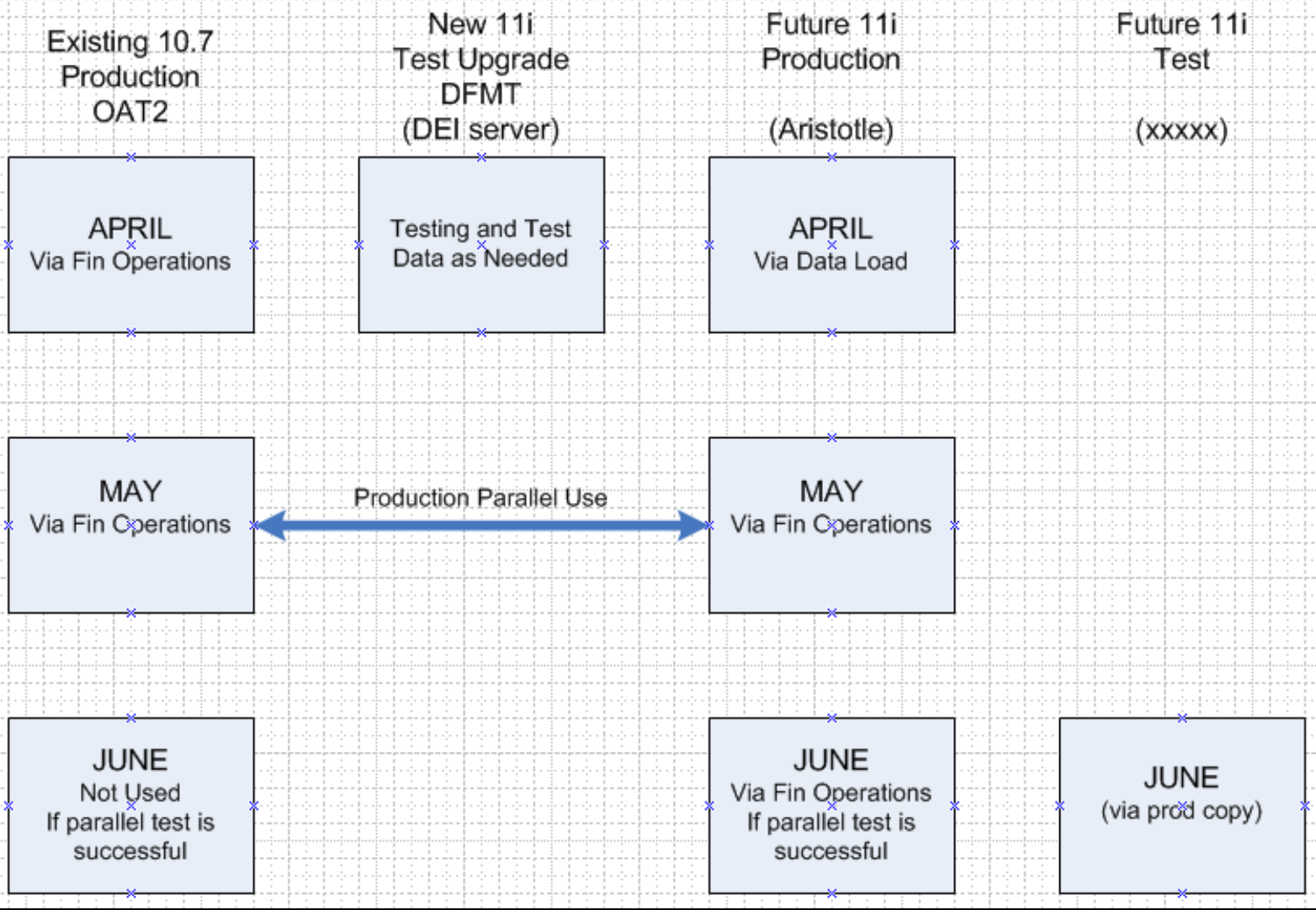
Working Draft
04/11/2006

DFM Oracle GL Upgrade Project Phases/Timeline



DFM Oracle GL 11i Upgrade Database Instances

Based on May, 2006 Parallel Test Alternative



Activities

1. Hold Project Team Kick-Off Meeting
2. Manage Project Execution
- Manage scope & requirements
- Manage roles
- Manage schedule
- Manage budget

3. Control the project
- Manage communications
- Control quality
- Control issues
- Control change
- Control risks
- Manage procurement

4. Prepare for Support Transition
5. Accept project

Deliverable:

Executed & Controlled Project

What it is | How to | Templates / Examples

How to: Hold Project Team Kick-Off Meeting

Recommended actions and strategies

The table below describes actions you can take to conduct a Project Team Kick-off Meeting:

Tip: Consider doing a periodic checkpoint to review the scope and requirements with the project sponsor just to confirm there are no assumptions about changes to be made.

	What to do	How to do it
1	Schedule Project Team Kickoff Meeting	Determine when team members are available and schedule the meeting.
2	Prepare Agenda and Meeting Materials	Several days prior to the meeting, prepare and send the agenda, completed Project Plan, and Management Methods/Expectations Worksheet to team members.
3	Hold Project Team Kickoff Meeting	Gather in a room conducive to presentation and discussion. Review and discuss details of the Project Plan. Hold a discussion to refine and clarify the management methods and expectations for the Execute and Control Stage. Keep the conversation focused and note all contributions using flip charts, projected computer screen, or other.
4	Project Team Kickoff Meeting Follow-up	Send meeting minutes to team members and invite additions/corrections. Include team input in the Management Methods and Expectations Worksheet and send this to team members for a follow-up review. Invite additions/ corrections.

Execute and Control Phase

- DFM Project Experience
- Issues
- Lessons Learned
- Key Deliverables

Tools

- Project Calendar (Oracle WiscCal)
- Issue Tracker (In-house tool)
- Document Mgmt (Project WebSpace)
- Status Reporting (In-house tool & other means)
- Frequently Updated Detail Plans (Excel)

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DFM Oracle Upgrade

Project Status Report – Final Report

October 11th, 2006

Project Dashboard

Key: Green = on track | Yellow = needs attention | Red = significant problem

Schedule	Budget	Scope	Overall
Target date met	Costs 5% over revised budget.	Planned system delivered.	Quality system implemented. Stakeholder's needs met.
Green	Yellow	Green	Green

Summary Narrative

The Department of Family Medicine (DFM) Oracle upgrade project has been completed. DFM's OAT2 Oracle Apps 10.7 General Ledger (GL) system was successfully replaced by Oracle's latest 11i E-Business Suite's GL module. The underlying system architecture, database, servers, and application tools were upgraded to current, fully-supported versions. The system implementation followed, and benefited from our experience with, DoIT's CBS Oracle 11i upgrade. The upgrade was accomplished by re-implementing the DFM system from the server hardware on up. The new software was tested, the GL system reconfigured, interfaces upgraded, reports and reporting tools rebuilt, training provided, and documentation updated. Three year's of journal entry and budget historical data was converted to the new system.

The reimplementation approach served us well by allowing us to remove obsolete data and system components, eliminate any need for downtime, and parallel test the old versus new system's financial operations for a month. The full month's parallel test was completed in August. The new Oracle 11i DFMP system was accepted, and the old OAT2 (OAT1 test) system decommissioned in September.

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Activities

1. Transition to Support Organizations
2. Conduct Post Project Review
3. Perform Administrative Closeout
4. Approve Project Closeout
5. Celebrate!

Deliverable:

A Closed Project (Archived Documentation)

Evaluate lessons learned

What it is | How to | Templates/ Examples

Templates/Examples: Conduct Post Project Review

The table below provides several templates you can use to help manage the project scope and requirements for your project.

Template	Example
Lessons Learned Checklist	
Post Project Survey	
Post Project Cover Letter	Post Project Cover Letter
Post Project Report	Post Project Report

Printer-friendly

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Close Phase

- DFM Project Activities
- Lessons Learned
- Key Deliverables

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DFM Oracle 11i Upgrade Post-Implementation Review

Respondents: 6 displayed, 6 total
Status: Open
Launched Date: 09/18/2006
Closed Date: N/A
Display: Display all pages and questions

1. Please indicate your level of agreement with the following statements:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	N/A	Response Total
1. We had appropriate and adequately defined project goals.	83% (5)	17% (1)	0% (0)	0% (0)	0% (0)	0% (0)	6
2. Project goals, tasks, and priorities were clearly understood by team members.	50% (3)	50% (3)	0% (0)	0% (0)	0% (0)	0% (0)	6
3. My individual deliverables were achievable.	50% (3)	50% (3)	0% (0)	0% (0)	0% (0)	0% (0)	6
4. Roles and responsibilities of the team members were clear.	67% (4)	17% (1)	17% (1)	0% (0)	0% (0)	0% (0)	6
5. Fellow team members accepted their tasks and followed through to complete them.	83% (5)	17% (1)	0% (0)	0% (0)	0% (0)	0% (0)	6
6. Needed tools, training, and resources were available to perform my tasks.	67% (4)	33% (2)	0% (0)	0% (0)	0% (0)	0% (0)	6
7. DoIT staff provided needed project support and guidance.	67% (4)	17% (1)	0% (0)	0% (0)	0% (0)	17% (1)	6

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Celebration

- Luncheon
- Appreciation Awards
- Certificates (Emmy's)

Project Success Factors

- Team dedicated to a clear, shared vision
- Strong, positive supplier-customer working relationship
- Experienced project team
- Adequate resources and DoIT support
- Well-organized effort

Summary PMA Experience

- Excellent guidelines & content
- Standard, professional templates
- Flexible adaptation
- Positive customer feedback

Additional Information

- Project Management Advisor (PMA) is copyrighted by UW Board of Regents.
- PMA can be accessed at http://www.pma.doit.wisc.edu/

Questions or Comments?

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