Does This Come With Instructions?
Creating A Manual for Your Organization’s Project Culture

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“First, have a definite, clear practical ideal; a goal, an objective. Second, have the necessary means to achieve your ends; wisdom, money, materials, and methods. Third, adjust all your means to that end.”

Aristotle
• Explore various project management methodologies and their specific applications in the project environment.

• Focus on project management as it relates to information and communications technology (ICT) systems and their implementation.

• Define organizational criteria deemed critical for project success in creating a manual specific to your organization’s project culture.
History of Project Management

1917: Gantt Chart Developed
1957: Critical Path Method (CPM) Invented
1958: Program Evaluation Review Technique (PERT) Invented
1965: International Project Management Association (IPMA) Founded
1969: Project Management Institute (PMI) Launched
History of Project Management

1975: PROMPTII Method Created

1986: SCRUM Named as a Project Management Style

1987: Project Management Body of Knowledge (PMBOK) Published by PMI

1996: PRINCE2 Published

1998: PMBOK Becomes a Standard

Ancient History of Project Management?
...ANCIENT PROJECT MANAGER THEORISTS SAY YES.

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Standard
“a collection of knowledge areas that are generally accepted as best practice in the industry”

Methodology
“a set or system of methods, principles, and rules for regulating a given discipline”

Manual
“a small book, especially one giving information or instructions”
Creating Your Project Management Manual

(YPMM)

- local universities, community colleges
- professional development organizations
- consultants

- materials such as books, manuals, other PM publications or websites
- organizational assets, training, experience
- and of course, our friend, Google!

“Data is like garbage. You’d better know what you are going to do with it before you collect it.”

Mark Twain
Project or Process?

A project shall be defined as “a temporary endeavor undertaken to create a unique product, service, or result” (Project Management Institute, 2013, p. 3).

“An ongoing work effort is generally a repetitive process that follows an organization’s existing procedures” (Project Management Institute, 2013, p. 3).

Is your organization a functional or projectized operation?

Do your project resources have clearly defined roles?

Do they know how their roles support the mission of the organization?
### Functional and/or Projectized?

<table>
<thead>
<tr>
<th></th>
<th>Functional</th>
<th>WEAK Matrix</th>
<th>BALANCED Matrix</th>
<th>STRONG Matrix</th>
<th>Projectized</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PM’s Authority</strong></td>
<td>None</td>
<td>Limited</td>
<td>Low to Moderate</td>
<td>Moderate to High</td>
<td>High to Complete</td>
</tr>
<tr>
<td><strong>Resource Availability</strong></td>
<td>Very Low</td>
<td>Limited</td>
<td>Low to Moderate</td>
<td>Moderate to High</td>
<td>High to Almost Total</td>
</tr>
<tr>
<td><strong>Project Budget Control</strong></td>
<td>Functional Manager</td>
<td>Functional Manager</td>
<td>Mixed</td>
<td>Project Manager</td>
<td>Project Manager</td>
</tr>
<tr>
<td><strong>PM’s Role</strong></td>
<td>Part-Time</td>
<td>Part-Time</td>
<td>Full-Time</td>
<td>Full-Time</td>
<td>Full-Time</td>
</tr>
<tr>
<td><strong>PM Administrative Staff</strong></td>
<td>None</td>
<td>Part-Time</td>
<td>Part-Time</td>
<td>Full-Time</td>
<td>Full-Time</td>
</tr>
</tbody>
</table>
Time to Break the Rules!

"To break the rules, first you have to know the rules."

- PMBOK and TPMM, enough?
- Can we talk?
- ROI?

“I want you to find a bold and innovative way to do everything exactly the same way it’s been done for 25 years.”
YPMM Goals?

To ensure projects:

• are uniform in their implementation.
• are delivered with minimal disruption to customers and internal organizational resources.
• are completed within budget, schedule, and scope as planned (or not)!
• have a reference and planning guide that is reflective of your organization’s PM culture to be utilized by the PM(s), Functional Managers, and Project Team Members.
Criteria for Use

- Organizational leadership has specifically requested that the project fully adheres to the YPMM and the PM to manage the project?
- Project requires team members from multiple functional areas within the organization?
- Project has identified a risk that has the potential to significantly impact project deliverables and/or success?
Criteria for Use continued...

- The project will require the procurement of outside professional services or resources?
- Not all projects may require full adherence to the information and guidance contained within YPMM?
- It is strongly recommended that the YPMM be used as a reference in implementing all projects no matter the size or scope.
Assumptions

Are there high-level organizational assumptions that can generally be applied to all projects?

- PM shall act as project manager for all projects requiring full adherence to the manual?
- Who assumes the responsibility of the role of Project Sponsor?
- How is funding and/or budgets for projects established or received?
- Does the organization perform or require long-range planning to establish expected future project costs?
Are there high-level organizational assumptions that can generally be applied to all projects?

- Does scheduling of projects include identifying and estimating tasks and their associated durations in the planning process?
- Are all organizational members subject to be utilized as project resources?
- What level of supervisory authority does the PM have in regards to Project Team Members, Functional Managers, etc.?
- Is the PM expected or considered to be a technical resource on projects?
Project Culture

- What is your overall organization like?
- Organizational leadership style and approach?
- Management of employees?
- What holds the organization together?
- What areas of emphasis drive the organization's strategy?
- Criteria of success?
### Project Culture

<table>
<thead>
<tr>
<th>Scope</th>
<th>Project management can best be described as a practice!</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>YPMM is to be considered a living document that is reviewed and updated as necessary—set a date!</td>
</tr>
<tr>
<td>Schedule</td>
<td></td>
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<tr>
<td>Project Team</td>
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<tr>
<td>Stakeholders</td>
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<tr>
<td>Communication</td>
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</tbody>
</table>

Project management concepts should be addressed to highlight the unique adaptations and assumptions that govern your project management process, or culture!
Scope

• Scope definition process should include all relevant stakeholders to ensure agreement of project expectations and deliverables.

• PM should create a Stakeholder Register to manage influence and information.

• It is understood that the final scope definition is not necessarily written in stone as there will inevitably be change during the project lifecycle.
### Example

#### Stakeholder Register

<table>
<thead>
<tr>
<th>ID #</th>
<th>Stakeholder</th>
<th>Title</th>
<th>Role</th>
<th>Power (L, M, H)</th>
<th>Influence (L, M, H)</th>
<th>Expectations</th>
<th>Requirements</th>
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Budget

• Budget is directly related to the accuracy or inaccuracy of the scope.
• Change will occur! Contingency funding/amounts approved by ???
• The budget should be inclusive of all costs associated with the project. Typical items to include in the budget are all hardware, software, licensing, and after-warranty maintenance care.
• Document all costs associated with using internal resources. This will ensure the budget reflects the total cost of ownership of the deliverable(s).
Schedule

• The schedule and the budget are inextricably connected as any inaccuracy or change in the scope affects them both.

• Using a WBS? Identify tasks in the sequence in which they need to occur. Once sequenced, task durations should be determined.

• With the WBS, tasks sequenced, and durations estimates completed—develop the project schedule. PMIS?
Project Team

• How are team members acquired—Functional/Projectized?

• Project resources often include outside vendors, temporary labor, consultants, SMEs, and integrators.

• To help assist the PM with task assignments of all project team resources, a Responsibility Assignment Matrix (RAM) should be created.
Example

<table>
<thead>
<tr>
<th>RACI Matrix</th>
<th>Project Title:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor:</td>
<td></td>
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<tr>
<td>Project Manager:</td>
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</table>

<table>
<thead>
<tr>
<th>Responsible-Accountable-Consulted-Informed</th>
<th>Role/Title</th>
<th>Role/Title</th>
<th>Role/Title</th>
<th>Role/Title</th>
<th>Role/Title</th>
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<tbody>
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<td>Activity/Task</td>
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Stakeholders

• The PM should identify the stakeholders in the Planning process of the project lifecycle.

• Identify the stakeholders as to their level of interest and influence, or power, which they may have over the project.

• A Stakeholder Registry should be created to reflect stakeholder engagement levels and communication preferences.
Communication

• Create a communication plan, or strategy, to include the specific type(s) of information required of each stakeholder.

• An effective project manager MUST communicate. Bad news is better than no news!

• Stakeholders can be a valuable resource for determining solutions for the many issues that can affect the project lifecycle.
Example

<table>
<thead>
<tr>
<th>Stakeholder(s)</th>
<th>Information Type(s)</th>
<th>Media Type(s)</th>
<th>Frequency</th>
<th>Timing</th>
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PROJECT LIFECYCLE

Initiating → Planning → Executing

Monitoring & Controlling → Closing

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Initiating

- The Project Charter and the Stakeholder Register are foundational documents requiring significant effort by all project participants.

- The Project Charter will define the project in regards to its purpose, objectives, and success criteria.

- A high-level schedule and budget should be created with a more detailed version of these two components of the charter to come later during the Planning process.

- The PM should take care in documenting each stakeholder, their expectations, and level of influence that they can have on the project.
Planning

- The PM will address all processes from each of the ten knowledge areas to create the Project Management Plan.

- This will be the baseline for which all project activities are measured and success criteria ultimately defined.

- The PM should consider the inclusion of all relevant stakeholders in planning the project.

- The Project Management Plan includes the management of change, quality, procurement, and risk.

- Human Resources, Stakeholder, and Communications Management Plans should also be developed by the PM.
Executing

- The Executing process chart gives the PM a brief overview of activities and tools in achieving the primary deliverable which is essentially the beginning of performing the project work.

- It is important to note that this is the start of a process that will undergo multiple iterations as the project progresses.

- The PM should understand that Executing cannot be exclusive of Monitoring and Controlling.

- Communications is a primary task of the PM during Executing in order to manage stakeholders, conduct procurements, and direct and manage the project work.
Example

<table>
<thead>
<tr>
<th>Change Request</th>
<th>Project Title:</th>
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<tbody>
<tr>
<td>Project Sponsor:</td>
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<tr>
<td>Project Manager:</td>
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</table>

<table>
<thead>
<tr>
<th>ID #</th>
<th>Requestor</th>
<th>Change Description</th>
<th>Reason/Benefit of Change</th>
<th>Effect on Schedule</th>
<th>Effect on Budget</th>
<th>Status (Approved/Denied)</th>
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Monitoring and Controlling

- Comparing planned versus actual progress related to quality of deliverables and manage all changes required to keep the project on schedule and within budget. Process?

- All approved changes should be incorporated into the Project Management Plan as the project progresses.

- The goal of all this activity is to control the project scope and thereby its schedule and cost.

- Manage stakeholders as planned.

- Communicate!
Closing

- PM should CLOSE, CLOSE, CLOSE!
- GOAL: Update all organizational assets.
- GOAL: Close out all procurement activities.
- And of course, **deliverables have to be accepted as defined** in the Project Management Plan for the above two process goals to be fully exercised.
- Celebrate!
Conclusion
How do you “do” projects?

• Explore and determine the best methodology for your organization.
• Focus on project management as it specifically relates to what you do and how you do it.
• Identify your organization's project culture and write the manual that reflects its criteria for project success.

Your way!

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Thank You!

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