



PM Best Practices...

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Introduction

- Purpose
- Project
- Best Practice types



Enterprise Data Warehouse



Description

- Designated as 1 of 8 management reform initiatives in the State Department by the former Secretary of State
- Combines information from different State Department systems into a central repository
- Initial delivery integrates 2 disparate data sources, 15 data sources overall targeted

Benefits

- Allows timely, cross functional data analysis to facilitate executive level business decisions
- Provides users desktop access to near real time data derived from multiple sources
- Promotes information sharing by turning raw data into shared knowledge
- Enhances the decision making process, boosts operating efficiency, and lowers operating costs
- Enables forward and backward view of data to know what has happened, what is happening, and what is likely to happen

Deliverable Matrix



- Reviewed the contract to identify deliverables
- Mapped deliverables to an intended delivery mechanism

SOW Deliverable	Project Deliverable
Task 1 - Vision Document	
Project Vision Document	Project Vision Document
Vision Stakeholder Briefing	Vision Stakeholder Briefing
Task 2 - Phase 1 Project Plan	
Phase 1 Project Plan	Phase 1 Project Schedule
Project Plan Stakeholder Briefing	Project Plan Stakeholder Briefing
Task 3 - Communication/Risk Plan	
Communications Plan	Communications Plan
Risk Mitigation Plan	Risk Mitigation Plan
Risk/Communication Stakeholder Briefing	Risk/Communication Stakeholder Briefing
Task 4 - Identify Requirements	
Detailed Requirements Document	System Requirements Document
Business Rules/Processes Documentation	System Requirements Document
Draft High Level Architecture	System Requirements Document
Draft Infrastructure Requirements	System Requirements Document
Draft Security Requirements	System Requirements Document
Requirements Stakeholder Briefing	Requirements Stakeholder Briefing
Task 5 - Technology Assessment	
Software Evaluation Methodology	Product Evaluation Document
Results of Product Evaluation	Product Evaluation Document
Recommended Technical Solution	Product Evaluation Document

Engage PMO



- Assistance identifying early project stage metrics and preparing the Quality Management Plan
- Reuse documents and templates



Vision Document

- Not to be confused with a strategy document.
- Provides a high level summary of:
 - Purpose of the project
 - Benefit to the Department
 - Stakeholders
- This was repeatedly used to provide individuals a high level education of the project.

Risk Register



- Developed a Risk Register kept in SharePoint
- Open to all team members to enter risks
- Rank severity, priority, and impact of risk
- Records mitigation and contingency plans for each risks
- Review at least monthly
- Communicate to client



Staff Accordingly

- Applied a matrixed staffing approach – sharing some staff among other projects
- Determine if employees or consultants should be used
- Stagger bringing on staff in accordance with work outlined in the schedule

Team Makeup



- Team was made up of senior individuals
- Hiring preceded with a technical phone interview then a follow up face to face interview
- Foster and encourage a collaborative work environment
- Team was involved in planning and schedule creation

Expert Validation



- Engaged a Data Warehouse expert (Kimball group) to provide validation of our strategy.
- Project sponsor had previously worked with this expert and had a pre-established trust with them.

Technical Assessment



- A contract deliverable was to conduct a technical assessment of Business Intelligence tools.
- Developed evaluation criteria specific to the project and had 3 leading vendors install and demo their product on the State Department network.
- Key for the government procurement process.



Politics

- Required high ranking sponsor
- Must keep open line of communication with client around political issues
- Know when to use the “trump” card
- Promptly record and distribute meeting minutes
- Try to form relationships with all potential stakeholders

Triple Constraint



- When having requirement discussions point out correlation of Cost, Scope, and Time to the customer
- Vital when delivery moved from 2.5 years to 13 months

Agile Principles



- Work with users to define report requirements
- Produce report mock ups and iterate over them to build consensus with the users
- Perform several demos of the product to various stakeholders

Document Repository



- Use MS SharePoint
- Protect against the proverbial “bus”
- Version history
- Limits emailing documents back and forth



Customer Relationship

- Form partnership
- Open line of communication
- Clear about impacts and needs
- Suggest solutions
- Made them look good

Communication



- Communication Plan
- Weekly team meeting
- Weekly and monthly status reports
- Weekly customer meeting
- Monthly sponsor status meeting
- Open door policy

Corporate



- Manage contract, meet deliverables
- Keep customer happy
- Pass on kudos
- Monthly project reviews
- Profitable

Miscellaneous



- Balance perfection and good
- Established a CCB
- Made things fun... or at least funny

Celebrate Achievements



- Lunches
- Cake
- Certificates of Achievement
- All hands recognition
- Newsletter article

Conclusion



Questions?

Tomatoes?

Duel Challenges?



Contact Info



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