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Managing Technology Projects in 2013

Perspectives on Technology Project Management



This White Paper is brought to you by your friends at The Fulcrum Group, Inc.



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Perspectives on Technology Project Management

Even the best company can effectively leverage and protect its valuable assets by consistently refining its approach to managing technology projects. Most every company utilizes some components of formal project management to get a new product released or a new business application - or technology - deployed.

We know there are endless sources of readily-available project lifecycle methodologies and guidelines to help guide you through a successful project management process, but we composed this document to help you focus on 6 simple (but rarely utilized) components which have a big impact on a project's success. Before we discuss the **6 Steps To A Successful Project**, a few sidenotes...



Basic Processes and Dimensions of Successful Project Management

First, let's define "Project Management". Wikipedia states that Project Management is the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals. With each project a leader must deal with standard constraints: budget, scope, time and quality.

Additionally, it's smart to have an idea of which approach you'll use. Circumstances might help determine which approach is most appropriate. These may include:

The traditional "Waterfall Approach" dictates a structured pattern: design, development, testing the solution to 100% (ensuring all critical functionality is completed) and then implementation of the solution.

The "Agile Approach" allows for a bit more flexibility in process: design, development, testing when the solution is at least 90% reached and then implementation of the solution. Using the Agile approach, critical functionality items are normally 100% completed and deployed iteratively. An Agile Approach strategy includes tweaking the solution after the release, bearing in mind the priority is getting "something" into production, knowing certain aspects will be fine-tuned in process.

Qualities of a great project manager

Key in executing a successful project and delivering the required product or solution is a focused, experienced project leader. While we believe a certified PMP gives a project the greatest chance for success, at a minimum you need an experienced *leader* wearing the hat of Project Manager.



The most successful project managers demonstrate a consistent ability to:

- Communicate exceptionally well
- Assess a situation and act quickly
- Reduce risks using change management discipline to manage scope creep
- Make decisions in order to keep the project moving
- Execute project review and obtain timely project sign-off



A Word About Signing Off

It is often thought that the sign-off process is needed to protect the project deployment team; however, the sign-off actually protects the project stakeholder. Once a decision is made to move forward on a project it is in everyone's best interest to maximize the company's financial investment. The signoff ensures buy-in and accountability on a common interpretation of the project's charter and scope. This makes the project defensible.

6 Steps To A Successful Project

1. Defining and signing a Project Charter
2. Communicating and giving context in a transparent relationship with stakeholders
3. Clearly defining roles prior to kicking off the project: The RACI Rules
4. Executing thirty (30) minute maximum weekly project status meetings
5. Utilizing an experienced leader with the right project management skillsets
6. Utilizing tools that allow the entire organization to participate and be engaged



1. Defining and signing a Project Charter

The project charter is a document that a company owner or senior executive approves that formally creates the project. Developed by the project manager, it is signed by the project stakeholder/sponsor. The charter gives the project manager the authority to apply resources, make decisions and leverage company assets toward the completion of the project.

The project charter also functions as the planning team's concise statement of core goals, values, and intent to deliver the desired solution. With it, the project manager is able to re-align the project to the desired solution at all times, and the charter allows key stakeholders to frame the scope and set expectations.

A clearly defined and well-written project charter is a powerful daily tool for judging the effectiveness of a project. Since the likelihood is high that a project team member may be unhappy with - or want a change in - the scope of the project, the charter is a good source for keeping the project in alignment with the business objective.

2. Communicating and giving context in a transparent relationship with stakeholders



It is critically important that project managers frame and give context when communicating “issues” with a stakeholder. The project leader needs to be confident enough to feel comfortable sharing mistakes or bumps in the road with the stakeholder.

For instance, if a deliverable is reported as “red” due to 5 out of 10 incomplete test results the project manager must give context and restate the “red” status definition. Red may indicate more attention is needed to get the item back on track. Red may not necessarily mean the solution is wrong.

During the course of weekly project status reviews with the stakeholders a project manager needs the freedom to express regret and share disappointment when the team does not “get it right” in terms of a project activity. In a transparent relationship, the project leader can often be overly critical in stop light chart ratings, however this transparent approach ensures there are very few “surprises”.

3. Clearly defining roles prior to kicking off the project. The “RACI” Rules

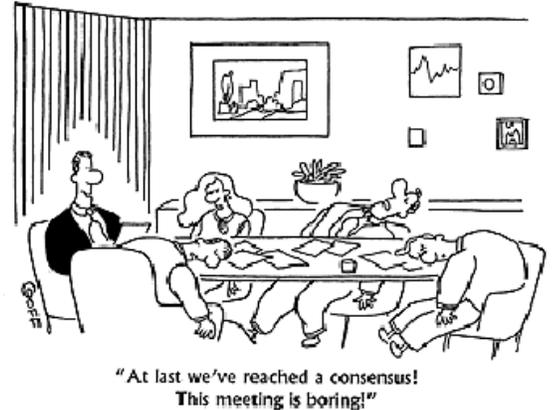
The responsibility assignment matrix clearly defines roles and the project team should religiously adhere to the *RACI* rules. The matrix is also known as Linear Responsibility Chart (LRC). Here are the *RACI* roles as defined in the project management world.

- *Responsible*: Those who do the work to achieve the task. There is typically one role with a participation type of Responsible, although others can be delegated to assist
- *Accountable* (also Approver or final Approving authority): The one ultimately accountable for the correct and thorough completion of the deliverable or task, and the one to whom Responsible is accountable. There must be only one Accountable specified for each task or deliverable
- *Consulted*: Those whose opinions are sought and this is two way communication
- *Informed*: Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication

4. Executing 30-minute maximum weekly project status meetings

It is more productive to have frequent, 30-minute status meetings rather than longer, 60-90 minute meetings. Once an efficient project management culture is established, participants can attend meetings prepared and energized knowing the session will be fast moving.

If a project manager has religiously adhered to the RACI rules then meetings are efficiently used to address risks, to make decisions and to set “communication plans” to inform the enterprise.



5. Utilizing an experienced leader with the right project management skillsets

An NFL coach once said, “great quarterbacking is built on plenty of repetition and experiences in game situations”. With an experienced project leader, there should be very little the leader has not seen in the area of delivering the project solution.

Planning is essential. Managing risk to reduce negative impact to the project is critical. However, no amount of planning covers all situations so you must be able to depend on the project manager’s “experience, gut and confidence” to make informed and calculated project adjustments.

While most stakeholders understand there are many complex and moving parts to a project, they just want the project to be completed on time, within budget and for the solution to work as designed. An experienced project leader is adept at making “halftime adjustments”, and calling plays to win the game, despite constraints and hurdles.

6. Utilizing tools that allow the entire organization to participate and be engaged

There is frequently debate regarding project tools and often the question arises, “Should we use Excel or MS Project?” Of course the answer depends on the organization but in general, Excel is a good bet.

Normally, the participating staff will be proficient in Excel already, so to facilitate communication and to help with the efficiency of all persons involved, Excel is almost a no-brainer as the predominant tool.

Excel spreadsheets can be easily updated for tracking progress and exchanged as status reports. Excel documents can also be imported into MS Project and loaded into most trouble ticketing systems.

While project management tools such as MS Project, Workbench and Mingle tend to be “tools of the project management trade” in 2013, the selected tools should enable the entire organization to be informed and engaged.

Get Beyond Basics for The Greatest Success!

The designated project manager is accountable for the finished work that results from completion of a series of tasks.

Certainly, your project manager needs to be proficient in the basics as outlined in the top half of this document.

However, if you want to enjoy a higher percentage of successfully deployed technology projects, then do be sure to apply the 6 steps reviewed in the 2nd half of this document.

An experienced project manager can surely execute your plan but going beyond the basics and following the 6 steps we have outlined will generate the greatest direct impact on your project's success.

