

RESEARCH PMO BROWN BAG LUNCH

TUESDAY, DECEMBER 10, 2019

**“WHAT TO EXPECT WHEN YOU’RE ASSIGNED
TO A PROJECT TEAM.”**

Anne E. Geary, MBA,PMP – Sr. Program Manager

Shareen Hinson, MBA, CSM - Sr. Project Manager

Margeya Patel, BS - Project Business Analyst

AGENDA

- Housekeeping items
 - Sign-in sheet
 - Interactive training
 - Survey – week of 12/15
- Introductions
- Project Terminology and Acronyms
- Project Roles and Descriptions
- Project Approach
 - Agile
 - Waterfall
 - Project Documentation
- Primary Tools for the Research PMO
- Additional Resources

INTRODUCTIONS

- PMO
 - Team intros; Anne, Margeya and Shareen
- Known types of Project Management found in administration at the Research Institute
 - Embedded project managers/ project work
 - Third party project work; vendors performing ad hoc or long term support
 - NEW – PMO, formal project requests for system and process improvement
- Participants
 - Name, Functional Team
 - Your experience working on/leading a project team?
 - Why you signed up for this event, what you hope to learn?

PROJECT TERMINOLOGY

- Project – A temporary endeavor undertaken to create a unique product, service, or result with a defined start and end point and specific objectives that, when attained, signify completion
- Project Management – The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements
- Business Analysis - The practice of identifying and solving business problems. It focuses on creating and implementing solutions to business needs via organizational development, process reengineering, or any number of other methods
- Project Management Office (PMO) - A management structure that standardizes the project-related governance processes and facilitates the sharing of resources, methodologies, tool, and techniques

*Reference #1

PROJECT ROLES AND DESCRIPTIONS

- Project Manager (PM)/Scrum Master (SM)
- Business Analyst (BA)
- Subject Matter Expert (SME)
- Project Owner / Product Owner
- Executive Sponsor
- Stakeholder
- Technology / Scrum Team

What roles have you filled on previous projects?

*Reference #1 & Appendix A

KEY TERMINOLOGY & ACRONYMS

- Statement Of Work - SOW
- Strengths, Weaknesses, Opportunities and Threats - SWOT
- Work Breakdown Structure - WBS
- Change Control Board - CCB
- Organizational Breakdown Structure - OBS
- Responsible, Accountable, Consult and Inform - RACI
- Time and Material - T&M
- Request For Proposal/Pricing - RFP
- Flowchart
- Gantt Chart

*What looks familiar?
What do you want to learn more about?*

*Reference #1 & Appendix B

PROJECT APPROACH - AGILE

- Agile – The Agile methodology is primarily used for software development projects and is an approach whereby requirements and solutions evolve through the collaborative effort of self-organizing and cross-functional teams and their customer/end user
- Agile Lite – Also known as Scrum is a project methodology focused on continuous delivery of system enhancements. In a Scrum or Agile Lite environment the team has predefined sprints and meet daily during the sprints to discuss progress. The goal is to have development, testing, acceptance and documentation completed during the sprints (usually 2 weeks)

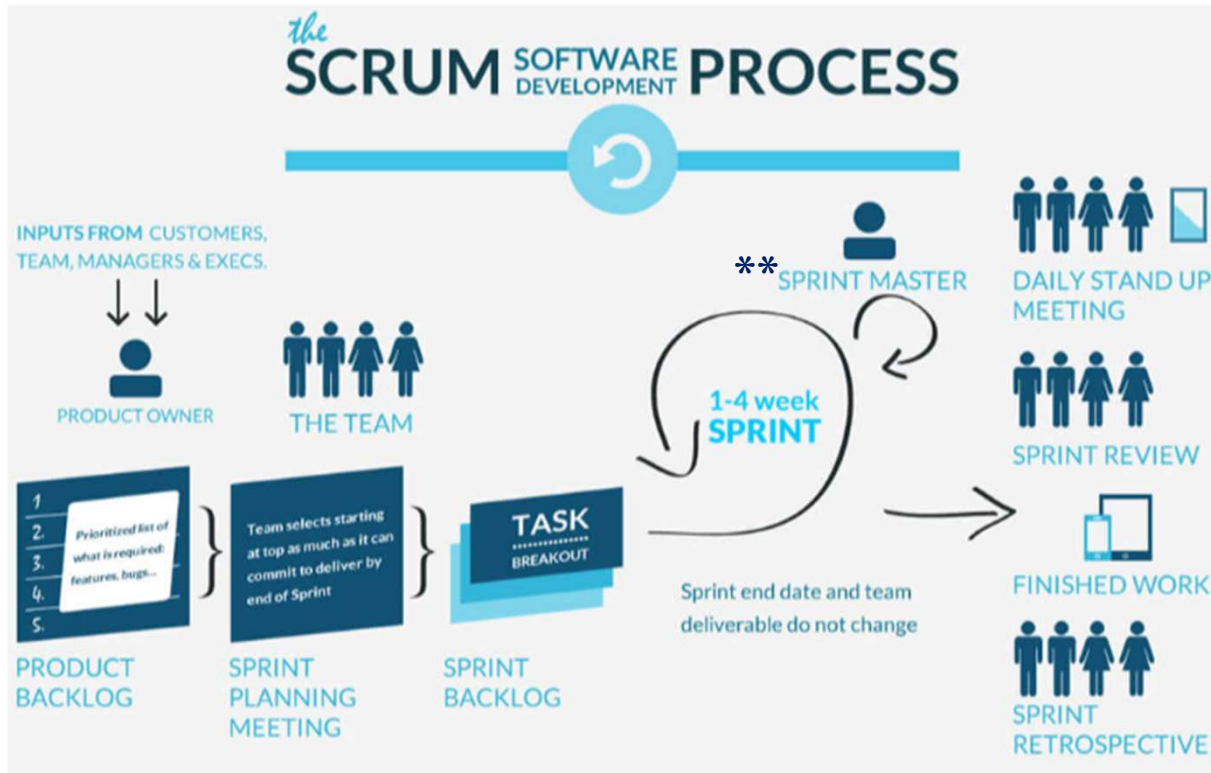
*Reference #2

AGILE



***Reference #2 & Appendix C**

AGILE LITE (SCRUM)



****Sprint Master = Scrum Master**

***Reference #3 & Appendix D**

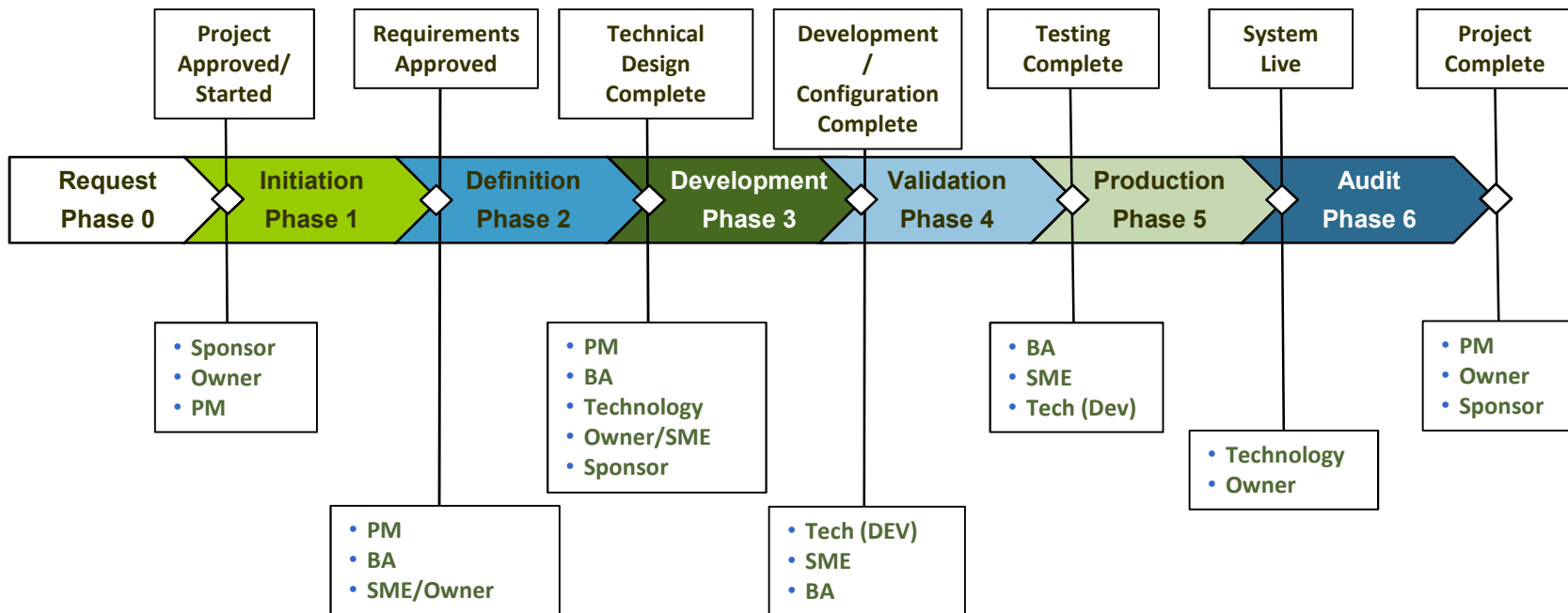
PROJECT APPROACH - WATERFALL

- Waterfall Lifecycle/Planning* – Also known as Predictive life cycle are those in which the scope, deadline and cost are determined as soon as possible in the project life cycle and efforts are focused on meeting the commitments established for each one of these factors
- Lean/Waterfall – This terminology is used when the project manager streamlines a traditional waterfall lifecycle to shorten the overall duration of the project without losing key control points that ensure successful implementation

*Reference #1

WATERFALL OVERVIEW

Key Phase Deliverables & Resource Expectations



What experience do you have working on a project?

DOCUMENTATION – PROJECT IMPLEMENTATION MATRIX*

RISK CLASS ● = Required ○ = Suggested	Alien	Stranger	Repeater	Runner
	Phase 0: Request			
Request sent to Research PMO	●	●	●	●
Request Evaluated and Dispositioned	●	●	●	●
Gate Sign-Off	●	●	●	●
Phase 1: Project Initiation				
Project Charter	●	●	●	●
Financial Assessment Worksheet (DRAFT)	●	●	●	○
Requirements Definition	●	●	●	●
Requirements Approval	●	●	●	●
Gate Sign-Off	●	●	●	○
Phase 2: Definition				
Test Strategy Definition	●	●	●	○
Test Strategy Approval	●	●	●	○
Risk Management Plan	●	●	○	○
Project Plan	●	●	●	○
Contract Management/Supply Chain Process, as applicable	●	●	●	●
Communications Plan	●	●	●	○
Training Needs Assessment	●	●	○	○
Design	●	●	●	○
Architecture/System Impact Assessment	●	●	●	●
Gate Sign-Off	●	●	●	●

RISK CLASS ● = Required ○ = Suggested	Alien	Stranger	Repeater	Runner
	Phase 3: Development			
Development	●	●	●	●
IT Unit Test	●	●	●	●
Test Design (Test Case/Test Script Creation)	●	●	●	○
Test Design Review & Approval	●	●	●	○
Training Plan	●	●	●	○
Training Materials	●	●	●	○
Production Support Plan	●	●	●	○
Implementation Plan	●	●	●	○
Gate Sign-Off	●	●	●	○
Phase 4: Validation				
System Test/System Integration Test, as applicable	○	○	○	○
User Acceptance Test (UAT) / Go Live Approval	●	●	●	●
Regression Test, as applicable	○	○	○	○
Performance Test, as applicable	○	○	○	○
End User Training	●	●	○	○
Gate Sign-Off	●	●	●	●
Phase 5: Production				
Customer Go-Live Notice	●	●	●	●
Production Verification	●	●	●	●
Warranty Period	●	●	●	●
Gate Sign-Off	●	●	●	●
Phase 6: Audit				
Production Support Plan Implemented	●	●	●	○
Sponsor Satisfaction Survey	●	●	●	○
Post Project Review	●	●	○	○
Gate Sign-Off	●	●	●	○

*Reference #1 and Appendix E

PRIMARY TOOLS FOR THE RESEARCH PMO

- MS Office; Word, Excel, Visio, Skype, Outlook, Power Point, One Note and Project
- Smartsheet; sheets, forms and calendars
- Research PMO Portfolio; Program and project visibility
- ServiceNow and Jira (Other tools used in Research)

What tools are you using?

ADDITIONAL RESOURCES

- Research PMO Web Site
 - Submit a question to us
 - Register for our next Brown Bag in FY20Q3
 - Request audit & governance support
- Take a class at CHOP:
 - Project Management
 - Process Improvement
 - MS Office
 - DISC with your team

Questions?

REFERENCES

1. PMBOK Guide, A Guide to the Project Management Body Of Knowledge, 2018, Sixth Edition, Project Management Institute
2. Hoek, Jasper.(2018) *Pursuing a Full Agile Software Development Life Cycle*. Retrieved from <https://www.mendix.com/blog/pursuing-a-full-agile-software-lifecycle/>
3. Maxxor. *SCRUM Software Development Process*. Retrieved from <https://www.maxxor.com/software-development-process>

APPENDIX A - PROJECT ROLES AND DESCRIPTION

- Project Manager (PM)/Scrum Master (SM) – The person authorized by the performing organization to lead the team that is responsible for achieving the project objectives
- Business Analyst (BA) – The person who serves as the liaison between the business community and the technical solution providers throughout the project life cycle
- Subject Matter Expert (SME) – Typically a member of the business team, or an external consultant, assigned to the project to support requirements, testing and training activities.
- Project Owner / Product Owner – An individual, or two, that has decision authority over the scope and deliverables for a project. They are typically a member of the project team.
- Executive Sponsor – An individual or a group that provides resources and support for the project, program, or portfolio, and is accountable for enabling success
- Stakeholder – An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio
- Technology / Scrum Team – Includes, but is not limited to, development, infrastructure, application or architecture support roles.

APPENDIX B - KEY TERMINOLOGY & ACRONYMS

Statement of Work (SOW). A narrative description of products, services, or results to be delivered by the project.

SWOT Analysis. Analysis of strengths, weaknesses, opportunities, and threats of an organization, project, or option.

Work Breakdown Structure (WBS). A hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables.

Change Control Board (CCB). A formally chartered group responsible for reviewing, evaluating, approving, delaying, or rejecting changes to the project, and for recording and communicating such decisions.

Organizational Breakdown Structure (OBS). A hierarchical representation of the project organization, which illustrates the relationship between project activities and the organizational units that will perform those activities.

RACI Chart. A common type of responsibility assignment matrix that uses responsible, accountable, consult, and inform statuses to define the involvement of stakeholders in project activities.

Time and Material Contract (T&M). A type of contract that is a hybrid contractual arrangement containing aspects of both cost-reimbursable and fixed-price contracts.

Request for Proposal (RFP). A type of procurement document used to request proposals from prospective sellers of products or services. In some application areas, it may have a narrower or more specific meaning.

Flowchart. The depiction in a diagram format of the inputs, process actions, and outputs of one or more processes within a system.

Gantt Chart. A bar chart of schedule information where activities are listed on the vertical axis, dates are shown on the horizontal axis, and activity durations are shown as horizontal bars placed according to start and finish dates.

APPENDIX C - AGILE

Planning Phase: Understanding the customers need and determining the requirements

Analysis Phase: The Analysis Phase is where you break down the deliverables in the high-level Project Charter into the more detailed business requirements

Design Phase: Depending on the subject of the project, the products of the design phase can include dioramas, sketches, flow charts, site trees, HTML screen designs, prototypes, photo impressions and UML schemas

Implementation Phase: The project takes shape during the implementation phase. This phase involves the construction of the actual project results

Testing Phase: During the testing phase, developers find out whether their code and programming work according to customer requirements. And while it's not possible to solve all the failures you might find during the testing phase, it is possible to use the results from this phase to reduce the number of errors within the software program

Maintenance Phase: The maintenance phase of the SDLC occurs after the product is in full operation. Maintenance of software can include software upgrades, repairs, and fixes of the software if it breaks. Software applications often need to be upgraded or integrated with new systems the customer deploys

APPENDIX D – AGILE LITE (SCRUM)

Product Backlog: In the simplest definition the Scrum Product Backlog is simply a list of all things that needs to be done within the project. It replaces the traditional requirements specification artifacts. These items can have a technical nature or can be user-centric e.g. in the form of user stories.

Sprint planning is a collaborative effort involving a Scrum Master, who facilitates the meeting, a Product Owner, who clarifies the details of the product backlog items and their respective acceptance criteria, and the Entire Agile Team, who define the work and effort necessary to meet their sprint commitment

The sprint backlog is a list of tasks identified by the Scrum team to be completed during the Scrum sprint. During the sprint planning meeting, the team selects some number of product backlog items, usually in the form of user stories, and identifies the tasks necessary to complete each user story

Daily standup: The daily stand-up is a commitment and coordination meeting for the entire team. It is designed to ensure that the entire team is aware of impediments, what stories are done or not-done, and what tasks are ready to be pulled from one team member's to-do list into someone else's

An Agile **retrospective** is a **meeting** that's held at the end of an iteration in Agile software development (ASD). During the **retrospective**, the team reflects on what happened in the iteration and identifies actions for improvement going forward

APPENDIX E – PROBABILITY AND IMPACTS*

Table 11-1. Example of Definitions for Probability and Impacts

	SCALE	PROBABILITY	+/- IMPACT ON PROJECT OBJECTIVES		
			TIME	COST	QUALITY
Alien	Very High	>70%	>6 months	>\$5M	Very significant impact on overall functionality
Stranger	High	51-70%	3-6 months	\$1M-\$5M	Significant impact on overall functionality
	Medium	31-50%	1-3 months	\$501K-\$1M	Some impact in key functional areas
Repeater	Low	11-30%	1-4 weeks	\$100K-\$500K	Minor impact on overall functionality
Runner	Very Low	1-10%	1 week	<\$100K	Minor impact on secondary functions
	Nil	<1%	No change	No change	No change in functionality

- **Additional risk is familiarity with the technology or process:**
 - **Alien** - No knowledge or implementation experience (High Risk / Waterfall)
 - **Stranger** – Knowledge is limited, no implementation experience (Medium Risk/Waterfall)
 - **Repeater** – Knowledge is high, implementation experience exists (Lower Risk/Lean Waterfall)
 - **Runner** – Knowledge is extensive, implementation is routine (Low/No Risk/ Lean Waterfall)