



PRECISION STUDIO

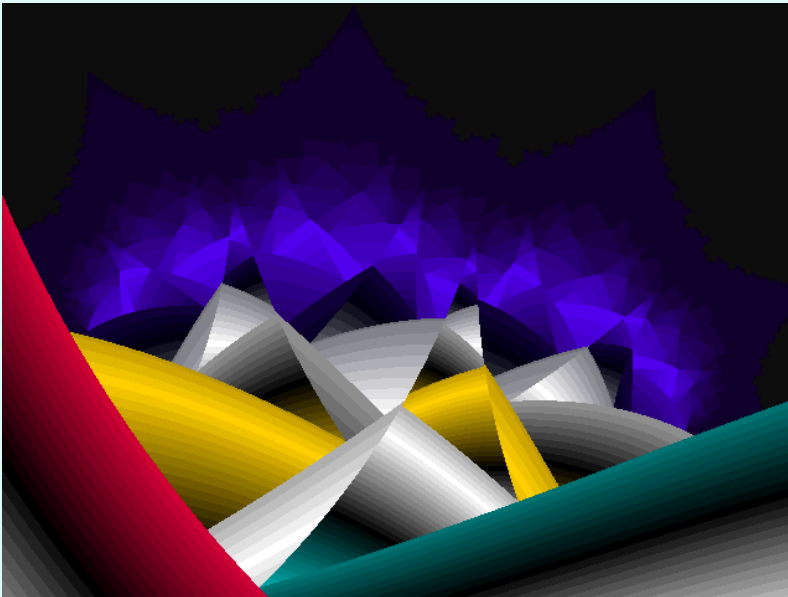
A LEADER IN EFFECTIVE COMMUNICATION

Project Management Methodology

**Project Operating
Principles**



Course Purpose



The purpose of this course is to provide an overview of the Project Management lifecycle that a project can go through from inception through implementation.

Participants will learn a common vocabulary and framework from which the project community can communicate and manage projects.



Course Objectives

At the end of this presentation, you will be able to...

- Verbalize how a project is defined, prioritized and selected (Divisional Operating Model).
- Explain the use and purpose of some key project essentials (Project Levels, Dashboard Reporting, and Quality Assurance reviews).
- Describe the fundamental elements of the Project Solutions methodology including the lifecycle phases, sub-phases, and the Common Project Management Processes.
- Apply the basic Project Organizational Structure concepts to your projects.
- Locate the necessary tools, templates, and techniques to support your projects.
- Describe Test Methodology.



Course Overview

This presentation is your guide to the vital elements for delivering successful projects. The topics that we will cover today are:

Project Essentials

- Operating Model (pieces that pertain to projects)
- Dashboard reporting
- Quality Assurance

Project Solutions Methodology

- Project Organization
- Project Lifecycle Phases
- Common Project Management (PM) Processes

Project Solutions Methodology

- Techniques, Templates and Tools
- Testing Methodology
- Training Opportunities



Project Essentials

Project Essentials include the following...

- The **Definition of Project** – An “investment”
- Project Approval, Prioritization, and Selection Process** – Divisional Operating Model, how it works.
- The **PM Orientation** for management and leadership
- Project Levels** - what they mean and why they are important to you
- Project Dashboard Reporting** - which projects report, how to report, and what is reported, and the benefits of reporting
- Quality Assurance Reviews** – what the reviews cover, how and when they should be used

The essentials define the minimum requirements to which all projects must consistently adhere.



Project Essentials

The **Definition of Project** – A “investment”



A project is: *“An investment of resources, capital, time, and commitment to achieve specific business benefits and outcomes, in a set time frame.”*

Success depends on rapid delivery and quick wins... we must deliver high-return business solutions faster than ever before.



Project Essentials

Project Prioritization and Selection - Which projects when?



Each Project Management Office establishes the process and criteria for project approval, and an Operating Model is developed based on ...

- ❖ Selection;
- ❖ Prioritization; and
- ❖ Funding.

For “approved” projects, the PMO, Project Sponsor, and Senior Management Team (SMT) should determine the Project Level and assign an appropriately skilled Project Manager.



Project Essentials

Project Levels – How complex is it?



For “approved” projects, the divisional PMO, Project Sponsor, and Senior Management Team (SMT) should determine the Project Level.

The level assigned is based upon a number of factors...sample follows:

Project Definition Factors	Score 1	Score 2	Score 3	Score 4	Score 5
Cost	\$1K ≤ \$20K	>\$20K ≤ \$276K	>\$276K ≤ \$1100K	>\$1100K ≤ \$3300K	>\$3300K
Duration	≤1 Month	>1M ≤ 6M	>6M ≤ 12M	>12M ≤ 18M	>18M
Resources	1 ≤ 2 FTEs	>2 ≤ 5 FTEs	>5 ≤ 10 FTEs	>10 ≤ 20 FTEs	>20 FTEs

Score results key:

Score Results	Investment Recommendation
<5	Not a Project
5-7	Level 1 Project
8-10	Level 2 Project
11-14	Level 3 Project
15	Level 4 Project or Recommend reassessment for breaking it down to smaller projects

To assure the highest likelihood of success, an SMT uses the project level to best align projects with appropriately skilled Project Managers...

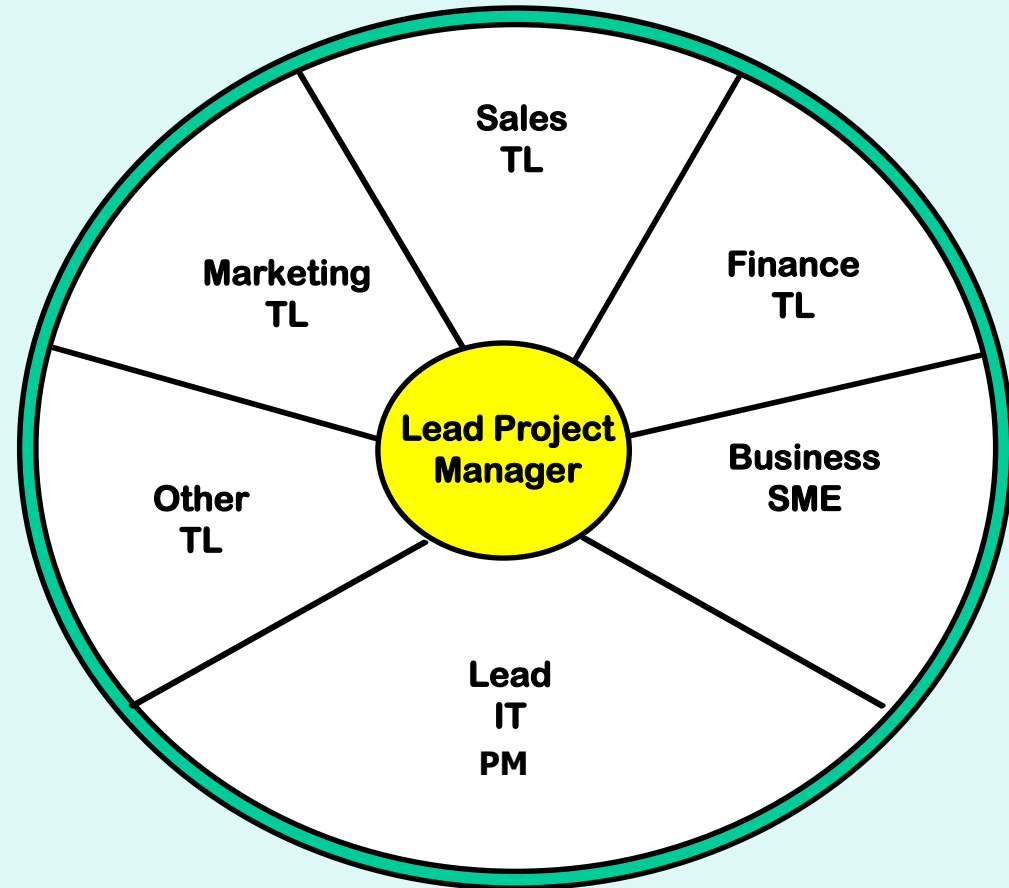


Project Essentials

PM Orientation – The Lead Project Manager



- The Lead Project Manager is a new role to many areas of the company.
- The primary responsibility of the Lead PM is management and leadership to achieve the project solution.
- Many existing Project Managers are referred to as Team Leads in this model.
- Individual titles do not change. Rather, roles are described in this model - not job titles - and do not necessarily indicate separate individuals.





Project Essentials

Project Dashboard Reporting - Status reporting



Dashboard reporting can be an essential management function. Information can be reported monthly and includes metrics for a project:

- ❖ Financials
- ❖ Schedules
- ❖ Resources
- ❖ Scope
- ❖ Quality

Accurate and timely dashboard reporting provides the information needed to help keep the project on track!



Project Essentials

Project Dashboard Reporting - How to begin



Project Managers should be responsible each month for timely dashboard reporting of accurate project information...

Work Effort 286: CHC PM Assessment Current Overall Status: ●

Report: State:

Project Header Baseline Info **Monthly Status** Detailed Financials

Financial ● Schedule ● Resource ● Risk ● Quality ● Scope ●

Issues/Risks: Filter by:

#	Type	High Level Name	Weighting	State	Date Entered
1	R	Availability of Cheryl Morgan	Medium	Open	09/26/2002

Project Header Baseline Info Monthly Status **Detailed Financials**

Cost

	Budget	Actual
FTE's	\$0	\$0
Consultants	\$0	\$0
Hardware/Software	\$0	\$0
Other	\$0	\$0
Total	\$0	\$0

Benefits

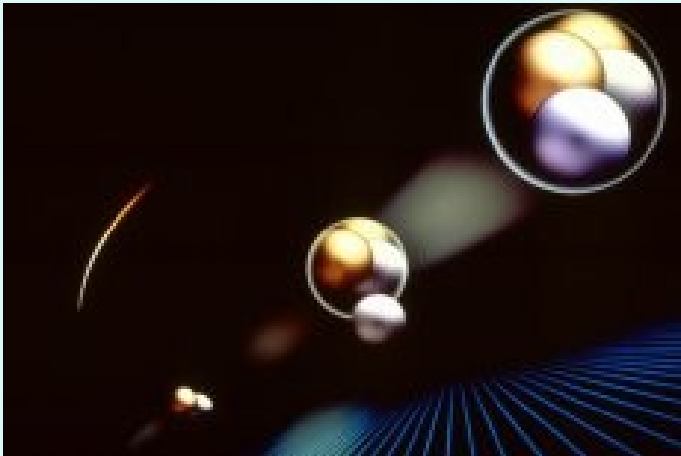
	Forecasted	Realized to Date
Cost Avoidance	\$0	\$0
Cost Reduction	\$0	\$0
Revenue Enhancement	\$0	\$0
Total	\$0	\$0



Project Essentials



Quality Assurance Reviews - What are they?



Periodic project Quality Assurance reviews are a series of questions and/or interviews that assess the status of a project Execution, Quality, and Risk.

The reviews are used by the Project Manager, Project Team and management to implement corrective action to help keep projects on track.



Project Essentials



Quality Assurance Reviews - What areas are reviewed?

To assess the status of project Execution, Quality, and Risk the QA reviews should examine the following areas...

- ❖ Business Value
- ❖ Project workplanning
- ❖ Project Management
- ❖ Financial Management
- ❖ Project Artifacts
- ❖ Personnel
- ❖ Methodology – Facilities – Knowledge
- ❖ Business Involvement
- ❖ Technology
- ❖ Test and Production Readiness

A report containing the findings and recommended corrective actions is prepared. It identifies the action that project leadership and senior management should take to ensure project success.



Project Essentials



Quality Assurance Reviews - What types of reviews are available?

Two forms of QA reviews are available...

- ❖ Self-Assessment conducted by the project team itself
- ❖ Independent review* conducted by the QA team

Both use Standardized checklists and questionnaires to provide consistency between reviews and use various ratings to assess a project health.

Note: It is recommended that a team perform self-assessment prior to the independent review.

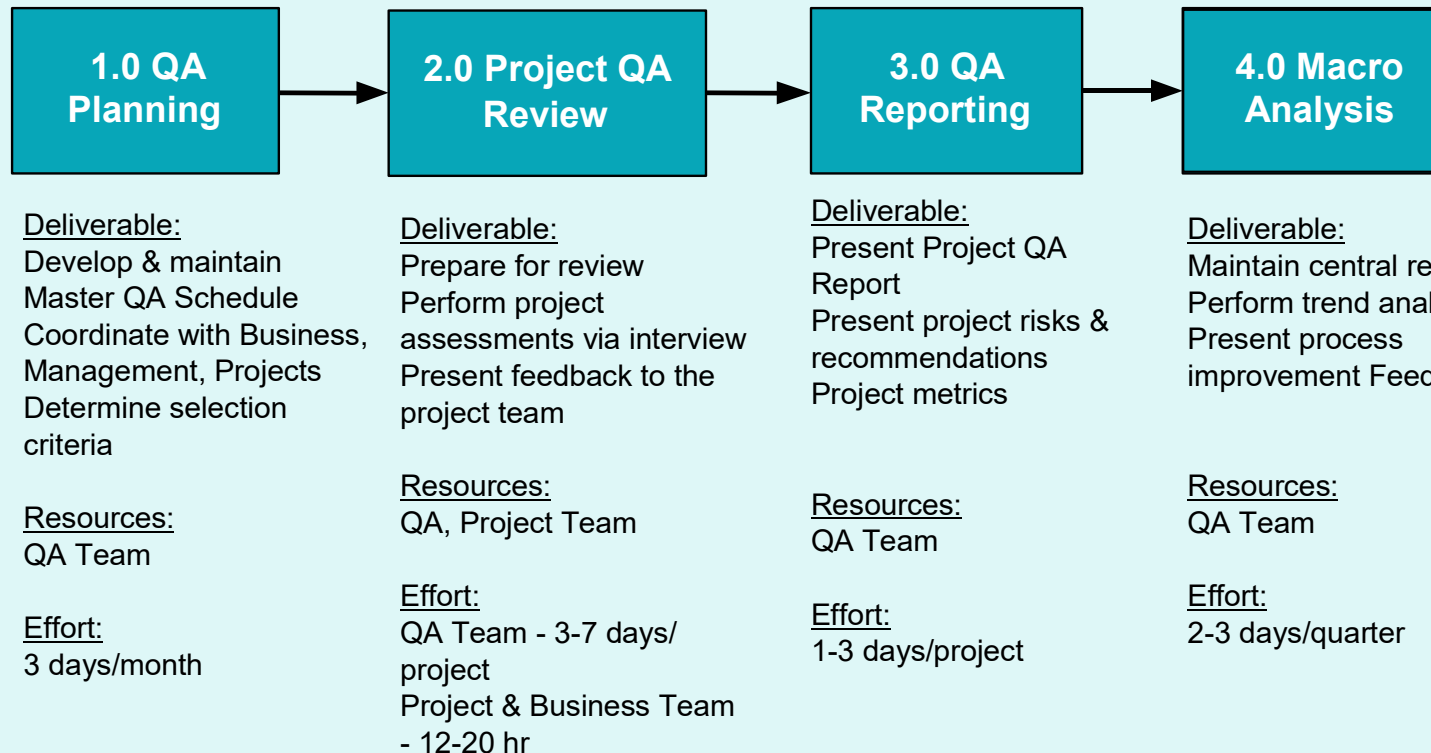


Project Essentials

Quality Assurance Reviews - How do they work?



The independent QA reviews process contains four steps...





Project Essentials

Quality Assurance Reviews - Which projects need a review?



The goal is for all projects to have independent QA reviews performed at the end of each major phase. Example...

- ❖ **Class A Projects:** require an independent QA review and must contact the PMP to schedule a review date;
- ❖ **Class B and C Projects:** perform self-evaluation QA reviews, i.e. self-Assessment.



Project Essentials

Summary

Project Essentials include the following...

- The **Definition of Project** – An “investment”
- Top Ten Project Management Principles** for project success
- Project Approval, Prioritization, and Selection Process** – Divisional Operating Model, how it works.
- The **PM Orientation** for management and leadership
- Project Levels** - what they mean and why they are important to you
- Project Dashboard Reporting** - which projects report, how to report, and what is reported, and the benefits of reporting
- Quality Assurance Reviews** – what the reviews cover, how and when they should be used

The essentials define the minimum requirements to which all projects must consistently adhere. _



Project Solutions

Project Solutions include the following:

- Methodology** - for managing projects
- Project Gates** – Decision points
- Project Lifecycle Phases and Sub-Phases** – Processes and deliverables.
- Common PM Processes** – Project management deliverables
- Project Organization** – Roles and responsibilities
- Engagement Model** – Framework for ensuring the right people are engaged at the right time



Project Solutions

Project Solutions - What is it?



Project Solutions is the methodology that defines your approach for managing and executing projects.

It is a comprehensive framework of processes, techniques, templates, and tools required for a complete methodology.



Project Solutions

Project Solutions - The Project Lifecycle

The project lifecycle is pivotal concept in understanding projects and tracking their progress from beginning to end. It is used for defining, justifying, building, and delivering solutions.

Your Project Solutions define a standard project lifecycle. It outlines a methodology that combines traditional waterfall and iterative processes. This approach enables you to tailor the methodology to the needs of the project - small or large, simple or complex. The project lifecycle consists of:

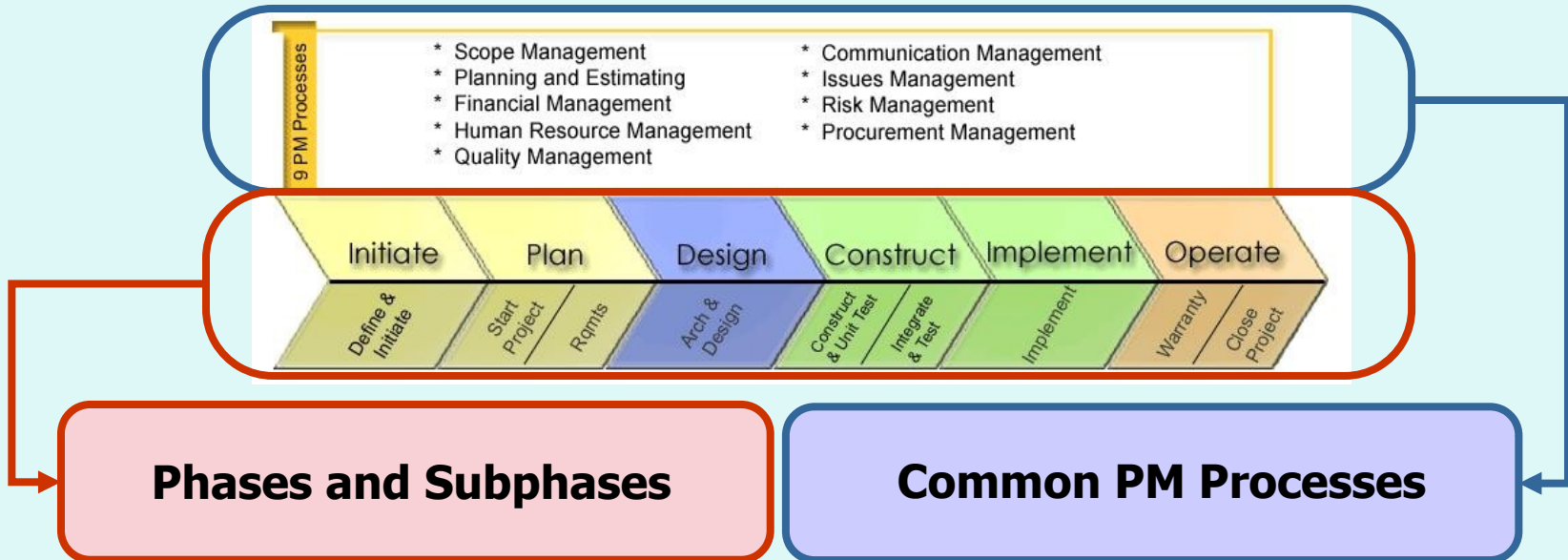
- ❑ Common project management processes
- ❑ Project phases.





Project Solutions

Project Solutions - The Project Lifecycle



This methodology defines a Project Lifecycle composed of:

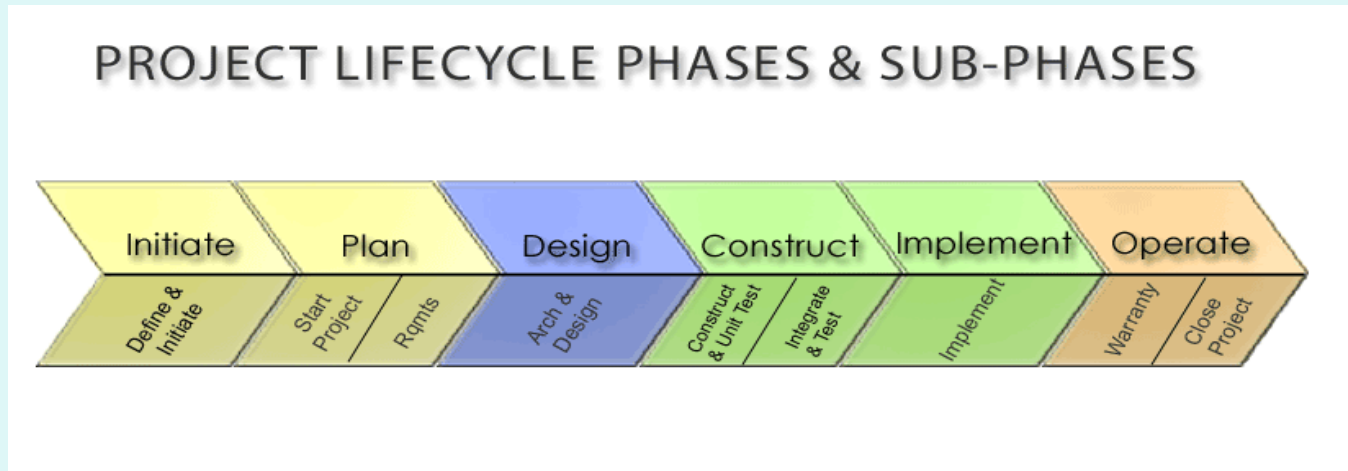
1. **PM Deliverables** - Nine Common Project Management Processes
2. **Project Deliverables** - Six Project Phases, broken out into Subphases, defining Project Processes



Project Solutions

Project Lifecycle Phases and Sub-Phases

The project Lifecycle has six successive phases that are further divided into nine sub-phases....



The lifecycle defines the activities, tasks, and deliverables necessary to bring successful projects from concept to operation. These are the Project Deliverables.



Project Solutions

Key Characteristics

a Project Solutions Methodology is...

- ❖ **Well Defined:** Project phases are clear, each builds upon the previous and completion criteria is defined;
- ❖ **Iterative:** Based on a cyclic approach to defining/building/delivering the end product;
- ❖ **Repeatable:** Established, based on experience, and can be characterized as practiced, documented, measured, and able to improve;
- ❖ **Interactive:** Emphasizes business/IT/user involvement throughout the project;
- ❖ **Delivery Oriented:** Focuses on specific, tangible, outcomes, and deliverables;
- ❖ **Tailor-able:** The framework is intended to be customized for each project, by each division to suit the business need, e.g., # of Releases, # of iterations, duration or overlap of project phases/sub-phases, specific deliverables, etc.;
- ❖ **Segment-able:** Enables and supports segmenting larger projects into smaller manageable activities.



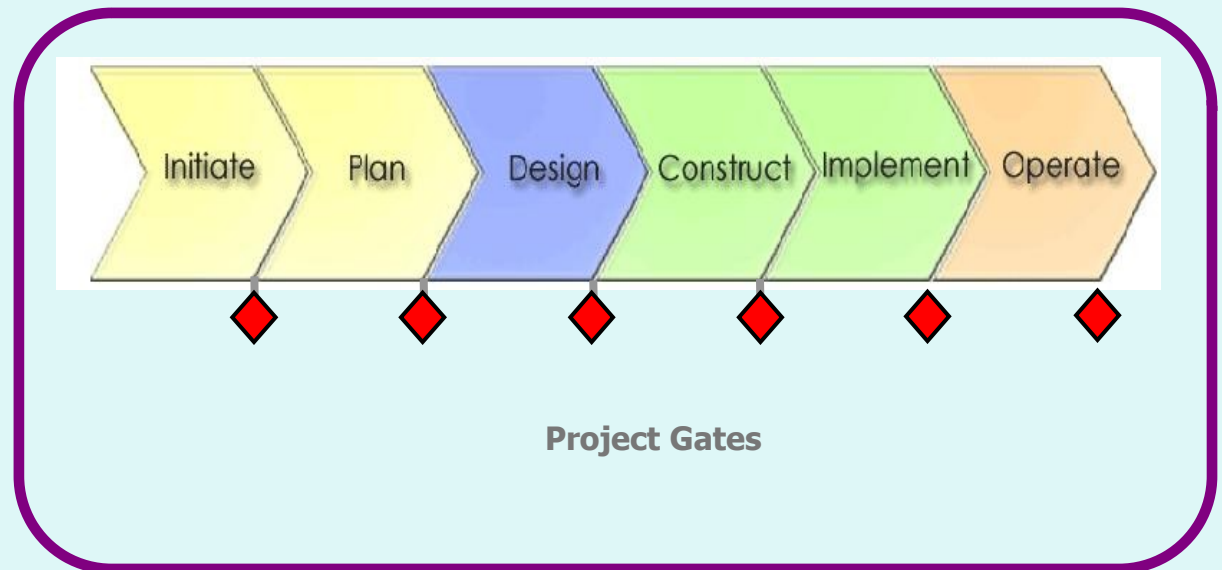
Project Solutions

Project Gates

Project Gates are formal decision points that generally align with the end of a phase.

The Program Management Office monitors projects through established gates. The gate reviews support the need for:

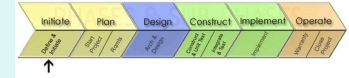
- Project evaluation,
- Realignment with business objectives,
- Decision making.





Project Solutions

Project Phases - Initiate Phase



*The Initiate phase has a single sub-phase –
Define and Initiate...*

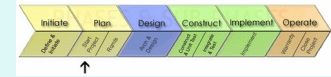
- ❖ **Prerequisite:** Approval of a project proposal
- ❖ **Summary Description:** Involves defining and preparing a project Business Case for review and decision by the divisional Senior Management Team
- ❖ **Primary Deliverables:** Business Case and Cost Benefit Analysis

The Business Case is a living document that is revisited and refined throughout the project lifecycle.



Project Solutions

Project Phases - Plan Phase



*The Plan phase has two sub-phases –
(1) Start Project and (2) Requirements.*

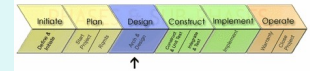
- ❖ **Prerequisite:** Approval of the business case
- ❖ **Summary Description:** Involves defining and preparing a Project Charter containing a detailed plan; and preparing a complete and consistent set of requirements that will achieve the business objectives
- ❖ **Primary Deliverables:** Project Charter and a Requirements Specification document

Main deliverables of the Plan Phase are documented and approved.



Project Solutions

Project Phases - Design Phase



*The Design phase has a single sub-phase –
Architecture and Design...*

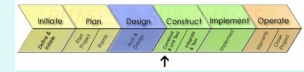
- ❖ **Prerequisite:** Approval of the Project Charter and requirements
- ❖ **Summary Description:** Involves rigorously defining a complete solution that is based upon the requirements
- ❖ **Primary Deliverables:** Logical Solution Architecture, Design Specifications, Test Strategies (Plans)

By the end of the Design phase, the project team should have a high degree of confidence that the agreed solution will ultimately deliver the intended business value.



Project Solutions

Project Phases - Construct Phase



The Construct phase has two sub-phases –

(1) Construct and Unit Test and (2) Integrate and Test.

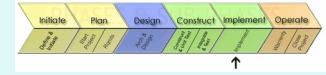
- ❖ **Prerequisite:** Completion and Approval of the Design phase
- ❖ **Summary Description:** Development and integration testing of a “production-quality” solution that is ready to operate in the organizational environment
- ❖ **Primary Deliverables:** Business Standard OP, Workforce enablement materials, technology infrastructure, application software, data and databases, system implementation, updated test strategy, test plans/scripts, and test results, and test reports

The construct phase is complete when all stakeholders verify the solution is ready for production.



Project Solutions

Project Phases - Implement Phase



The Implement phase has a single sub-phase - Implementation

- ❖ **Prerequisite:** Verification by all stakeholders that the solution is ready for production
- ❖ **Summary Description:** Delivery of the solution to the customer and readying the business for use of the new solution through training, communication, preparing the production environment, and installation and testing of the solution in the production environment
- ❖ **Primary Deliverables:** New solution, retired former solution (if applicable), trained users, and supporting operating guides and materials

IT solutions, once implemented, must adhere to the Change and Release Management (CRM) processes.



Project Solutions

Project Phases - Operate Phase



*The Operate phase has a two sub-phases –
(1) Warranty and (2) Close.*

- ❖ **Prerequisite:** Successful implementation
- ❖ **Summary Description:** Support and maintenance of the implemented solution, measuring business results against the objectives set out in the Business Case, capturing lessons learned, and placing project artifacts in a repository
- ❖ **Primary Deliverables:** Warranty Acceptance Checklist (AMP), Warranty Summary Report, Project Implementation Review Report, Project Closure Report.

The end of this phase marks the completion of a project!

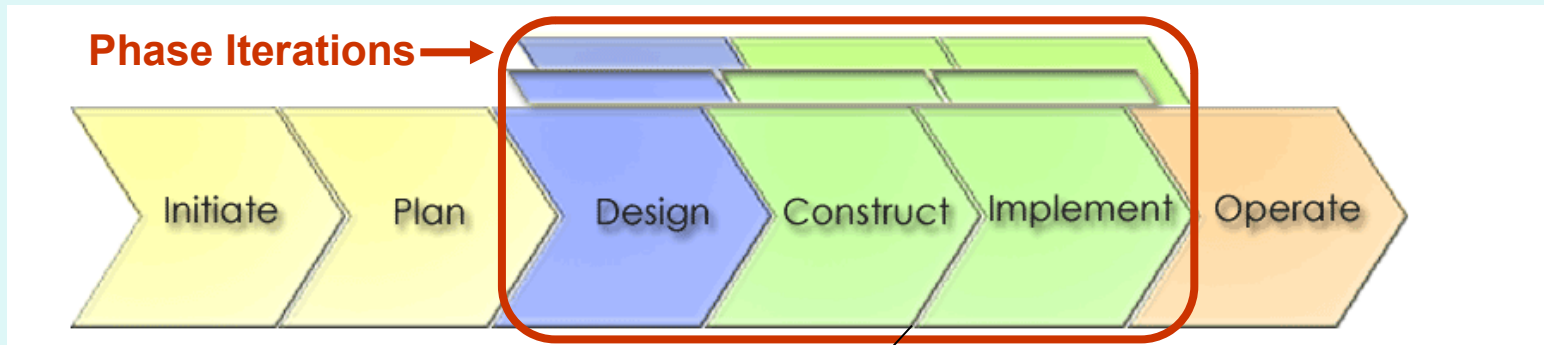


Project Solutions

Project Lifecycle Customization



The Lifecycle may be customized to meet unique project requirements. An example is iterating phases for incremental application development (stage and release)...



Each of the phases can also be scaled according to the needs of your particular project.



Project Solutions

Common PM Processes



Nine Common Project Management Processes are essential to all projects:

9 PM Processes

- * Scope Management
- * Planning and Estimating
- * Financial Management
- * Human Resource Management
- * Quality Management
- * Communication Management
- * Issues Management
- * Risk Management
- * Procurement Management

Their primary goal is to help keep your project on track. These are the Project Management deliverables.



Project Solutions

Common PM Processes



The Common PM Processes are used throughout the project lifecycle...



and provide the necessary support for your day-to-day project activities.



Project Solutions

Common PM Processes - Scope Management



Scope Management

- ❖ **Summary Description:** Scope Management ensures that the project focuses only on the work required for completing the project successfully, preventing work outside of that scope that contributes to delays and overruns.

Managing the project scope is the cornerstone for completing a successful project that delivers the specified customer requirements in the time projected.



Project Solutions

Common PM Processes - Planning & Estimating



Planning & Estimating

- ❖ **Summary Description:** Planning and Estimating is the initial development and continual refinement of project workplans, also known as Work Breakdown Structures (WBS), throughout the projects' life. At a minimum, the refinement (replanning) occurs coincident with the end of a phase.

Most initial project workplans and resource estimates carry a low level of confidence. After the Design Phase there should be a high level of confidence in the remaining workplan schedule and resource projections.



Project Solutions

Common PM Processes - Financial Management



Financial Management

- ❖ **Summary Description:** Financial Management is a step by step process of resource planning, cost estimating, cost budgeting and cost control. It ensures that funds are available to successfully complete the project, and then tracks and controls the funds to prevent an overrun. As a project moves through the phases of the lifecycle, cost estimates improve in accuracy as details surrounding the project and work plan increase.

Financial Management is closely tied with Planning and Estimating. Confidence levels in budget estimates will grow as project scope, requirements, and solution design mature.



Project Solutions

Common PM Processes - Quality Management



Quality Management

- ❖ **Summary Description:** Quality Management improves the probability of project and solution success by identifying and correcting, or preventing, process or solution quality issues that cause delays, overruns, and inferior solutions. It includes embedding quality checkpoints into the project workplans.

Adhering to a rigorous quality plan through-out the project will significantly reduce rework which could lead to higher customer satisfaction and reduced maintenance costs.



Project Solutions

Common PM Processes - Human Resource Management



Human Resource Management

- ❖ **Summary Description:** Human Resource Management matches the right skills, experience, interests, and availability with the project staffing requirements, to ensure quality work is efficiently produced. This includes organizational planning, staff acquisition, and team development and training.

A key to building a strong project team is to clearly understand the types of jobs and skills needed to successfully execute the project.



Project Solutions

Common PM Processes - Communication Management



Communication Management

- ❖ **Summary Description:** Communication Management helps sustain strong Project Sponsorship, stakeholder and project team support and involvement by providing the right information, at the right time, in the right format and delivered by the right person to the appropriate stakeholder.

Proper communication planning and execution is critical in garnering and maintaining effort and support during the project. It contributes to a smooth implementation of the new system and processes into the operating environment.



Project Solutions

Common PM Processes - Issue Management



Issue Management

- ❖ **Summary Description:** The purpose of Issue Management is to proactively identify issues, which if not resolved, will impede the project. The issue management process must establish an effective channel for obtaining decisions and approvals prior to when the project will be impeded.

The Project Manager should keep the Project Sponsor and Steering Committee informed of any identified issues that pose a significant threat to the project schedule, cost, scope or quality.



Project Solutions

Common PM Processes - Risk Management



Risk Management

- ❖ **Summary Description:** The Risk Management process provides a standard approach for controlling risks on a project. It is designed to facilitate the rapid identification, escalation (as needed) and mitigation of risks in order to better promote successful outcomes on projects.

All areas on the project team should assist in the identification and mitigation planning of project risks.



Project Solutions

Common PM Processes - Procurement Management



Procurement Management

- ❖ **Summary Description:** The steps in the Procurement Management process include Planning, Solicitation Planning, Solicitation, Source Selections, Contract Administration and Contract Close. Procurement Management includes the process required to acquire goods and services from outside of .

Clearly defining and articulating the projects resource needs is critical in procuring proper resources.



Project Solutions

Project Organization - Effective Project Staffing



Selection of project team members must be based upon skills needed and personal attributes of the individual. These simple steps can help you build a high performance team...

- 1) The Project Manager and team leads should **identify the project organization**;
- 2) They should **prepare formal job descriptions** that list the required skills and roles and responsibilities for each position in the project organization;
- 3) The Project Manager, team leads, and divisional PMO work together to **identify and acquire the appropriate resources** - though the PM has the authority to decide which and when resources will join or leave the team; and
- 4) **Assure ALL team members have** annual performance objectives aligned to their project responsibilities.

A first priority is to staff projects with internal resources before looking to outside sources.

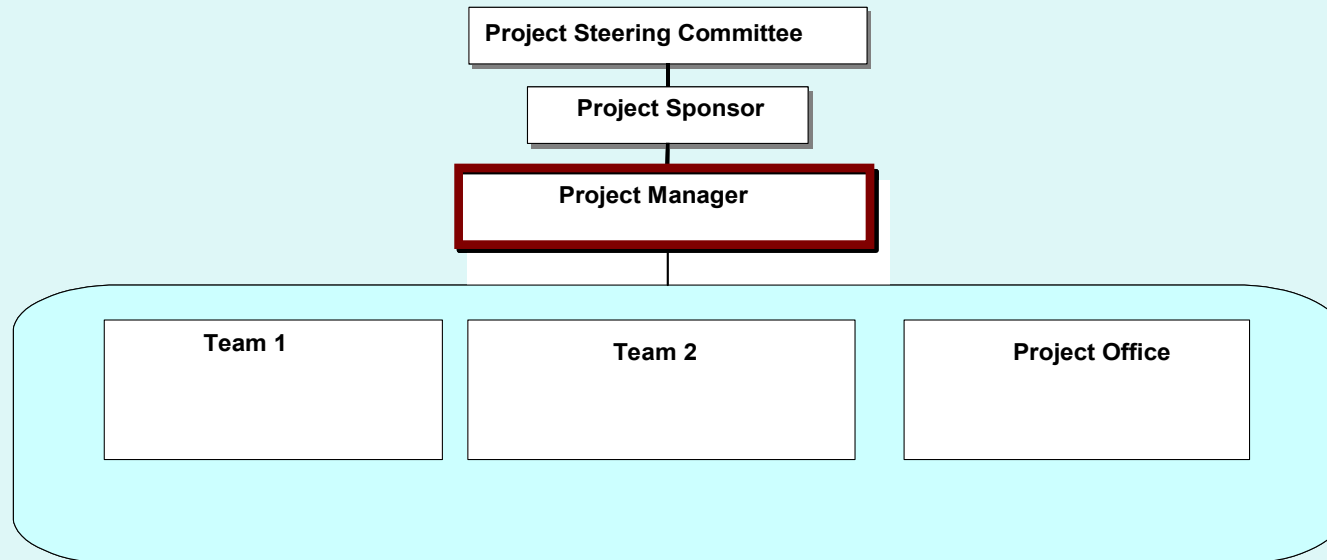


Project Solutions

Project Organization - Fundamentals



A working project organization must have defined roles and responsibilities, clear accountability, and unambiguous channels of communication.

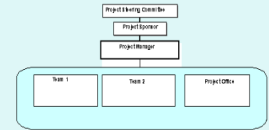


Each project must have a single Project Manager who is empowered and accountable for the project.



Project Solutions

Project Organization – Tailored for each project



Project organizations can be tailored for each project

Project Steering Committee

Project Sponsor

Project Manager

- Business Case management & project results
- Overall approach & integrated project mgmt
- Financial & resource mgmt
- Scope, quality, schedule, risk, & issue mgmt

Support Areas

- Finance-division
- Information Protection
- Legal & Public Affairs
- Others as needed (e.g. Marketing)

Legend

Responsibilities for each team

- Systems Team Leadership
- Business Team Leadership
- Subject Matter Expert (SMEs)

Note teams/roles may be combined based on project type/size

Technical & Infrastructure Team

- Infrastructure design and deployment
- Technical architecture and design
- Deployment & rollout support

Data Design & Integration Team

- Data architecture & database design
- Data conversion
- Data & database administration

Implementation Team

- Implementation strategy
- Application cutover schedule
- Interdependencies management
- Phased implementation schedule to support release mgmt

Process & Application Development Team

- Business process definition, update, or confirmation
- Business context & confirmation from Subject Matter Experts (SMEs)
- Requirements definition & management
- Policy & procedure changes
- Application architecture & design
- Program design, construction & unit testing
- Systems documentation
- Testing/fix, support & warranty period

Testing Team

- Testing strategy and plan
- Test cases and scripts
- System & integration testing
- Performance volume stress (PVS) testing
- User acceptance testing
- Operational readiness testing (ORT)
- End to end Testing

Project Office

- Project administration & support
- Reporting & document mgmt

Training & Documentation Team

- Training & strategy plan
- Training curriculum
- User documentation & training aids
- Training delivery & tracking

Organizational Design & Enablement Team

- Organizational architecture
- Organizational readiness assessment
- Organizational impact management
- Communications plan & vehicles



Project Solutions

Project Organization - Steering Committee



The Steering Committee is a decision making body. It provides SMT (Senior Management Team) oversight and direction for a project. An effective Steering Committee must...

- ❖ **Create** an environment in which a project can be successful;
- ❖ **Conduct** periodic meetings to review project metrics, status, and objectives against plan and provide guidance for future project direction;
- ❖ **Provide** scope management process oversight for review and approval of changes to project schedule, cost, or performance;
- ❖ **Resolve** project issues and changes escalated by the project Sponsor;
- ❖ **Provide** cross-divisional and functional representation and evaluation;
- ❖ **Identify** operational issues and interdependencies; and
- ❖ **Build** consensus and cooperation.

It is often composed of a cross-divisional group, or members of a single division who have unique interests in the project.



Project Solutions

Project Organization - Project Sponsor



The Project Sponsor / Business Partner is the ‘owner’ of a project at ...

- ❖ **Initiate** or request projects;
- ❖ **Ensure** development of and gain Business Case approval;
- ❖ **Approve** the Project Charter, Requirements, and Business Systems Design;
- ❖ **Escalate** project issues and changes to the Steering Committee;
- ❖ **Approve** deliverables from a business perspective;
- ❖ **Participate** in project governance and business issue resolution;
- ❖ **Approve** user training and documentation;
- ❖ **Approve** user acceptance testing; and
- ❖ **Participate** in post-implementation review/assessment.

The Sponsor is ultimately accountable for project success, and is its advocate, defender, and visible face in the organization.



Project Solutions

Project Organization - Project Manager



The Project Manager is accountable to the Project Sponsor. Their primary role is to manage day-to-day project activities including...

- ❖ **Leading, directing, and coordinating** activities related to planning, executing, and implementing the project;
- ❖ **Monitoring** project trends, establishing key project metrics;
- ❖ **Reviewing** change requests;
- ❖ **Managing** team and stakeholder relations; and
- ❖ **Facilitating** corrective action.

A Project Manager also provides status updates to the Project Sponsor, team members, and stakeholders regarding schedule, cost, staffing, and business metrics.



Project Solutions

Project Organization - Team Leaders



Team leaders are accountable to the Project Manager and have specific skills in a particular business or technical area. They are expected to...

- ❖ **Contribute** their expertise in their area of specialization;
- ❖ **Recommend** ways to meet project objectives;
- ❖ **Assist** with the coordination and scheduling of activities;
- ❖ **Prepare** detailed project workplans for their areas;
- ❖ **Participate** in problem solving and conflict resolution;
- ❖ **Identify** the resources best suited to perform the required tasks; and
- ❖ **Report** and track metrics for their area and be able to articulate the impact and relationship to the overall project.
- ❖ **Produce** and/or manage production of project deliverables
- ❖ **Manage** team to ensure work packages are assigned and deliverables produced.

Team Leaders are primary liaisons between the Project Manager, other Team Leads, and their team members



Project Solutions

Project Organization - The Project Office



The Project Office is accountable to the Project Manager and provides administrative support for the project.



Project Solutions

Project Organization - Engagement Model



What is the Engagement Model?

- A framework for ensuring that the right people are engaged at the right time with clear accountability for delivering Systems Community projects and services
- The basis for establishing a consistent approach for fulfilling requests for Systems Community services from all divisions
 - Problems
 - Service Requests
 - Projects



Project Solutions

Project Organization - Engagement Model



Project Solutions is entirely consistent with engagement model which...

- ❖ **Makes it clear** who the business should contact for each type of system request;
- ❖ **Makes it clear**, within the systems community, who to contact for what, by defining roles, responsibilities, and accountabilities;
- ❖ **Establishes a consistent** repeatable process for engaging system services; and
- ❖ **Establishes a standard**, enterprise-wide, approach for engaging the systems community.

The engagement model complements and supports the project organization by defining the primary points of contact for inter-practice team coordination.



Project Solutions

Project Organization - Engagement Model



Within the context of a project, the Engagement Model relies on five key leadership roles with the following responsibilities:

- ❖ **Project Sponsor (Business Partner)** – Initiates project requests through the RM, approves business deliverables, provides active sponsorship.
- ❖ **Project Manager (PM)** – is the ONE Project Manager for the project. Leads, directs and coordinates project activities. Provides status to Project Sponsor.
- ❖ **Relationship Manager (RM)** – Primary point of contact for the business, develops Service Level Agreements (SLAs), and ensures authorizations, funding, and engagement personnel are in place. The PM coordinates with the RM when providing project status to Project Sponsor.
- ❖ **Business System Architect (BSA)** – Primary point of contact into technology architecture practices and is accountable for architectural deliverables. Provides project status to PM.
- ❖ **Technology Services Manager (TSM)** – Primary point of contact into Systems - accountable for coordination and oversight. Provides status to PM.

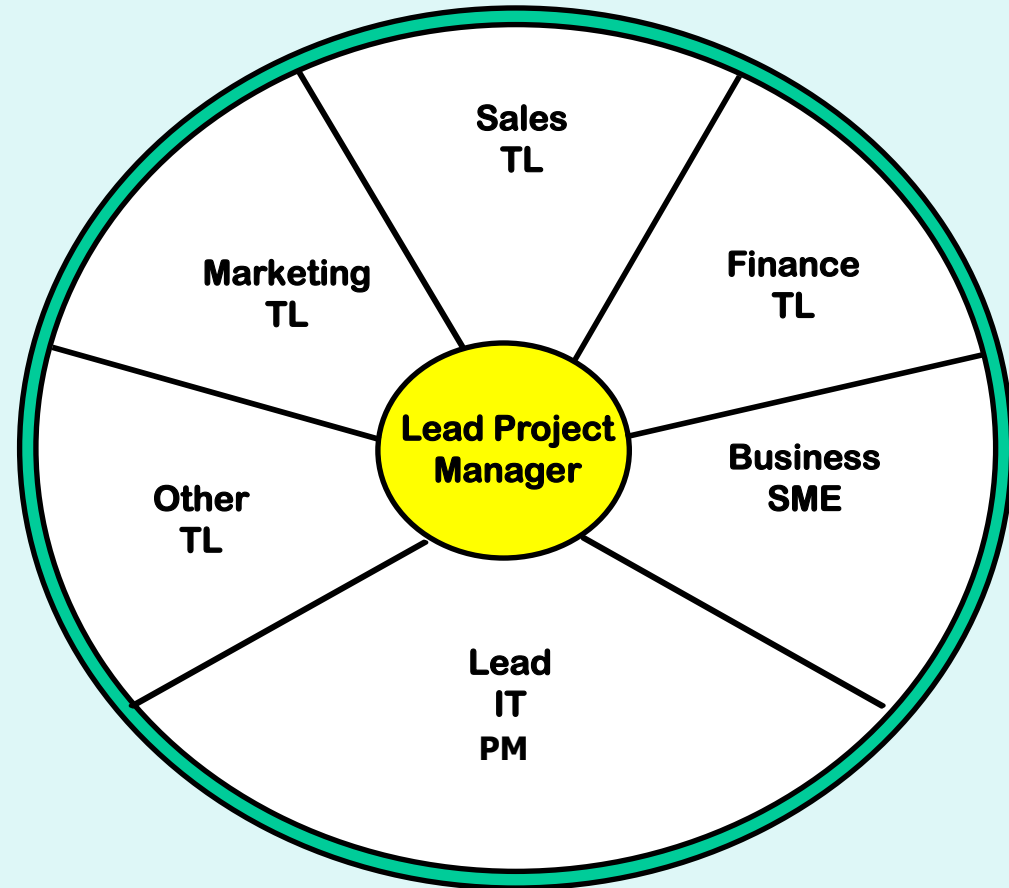


Project Solutions

Project Organization - Engagement Model – Lead Project Manager



- The Lead Project Manager is a new role to many areas of the company.
- The primary responsibility of the Lead PM is management and leadership to achieve the project solution.
- Many existing Project Managers are referred to as Team Leads in this model.
- Individual titles do not change. Rather, roles are described in this model - not job titles - and do not necessarily indicate separate individuals.





Project Solutions

Project Organization - Engagement Model



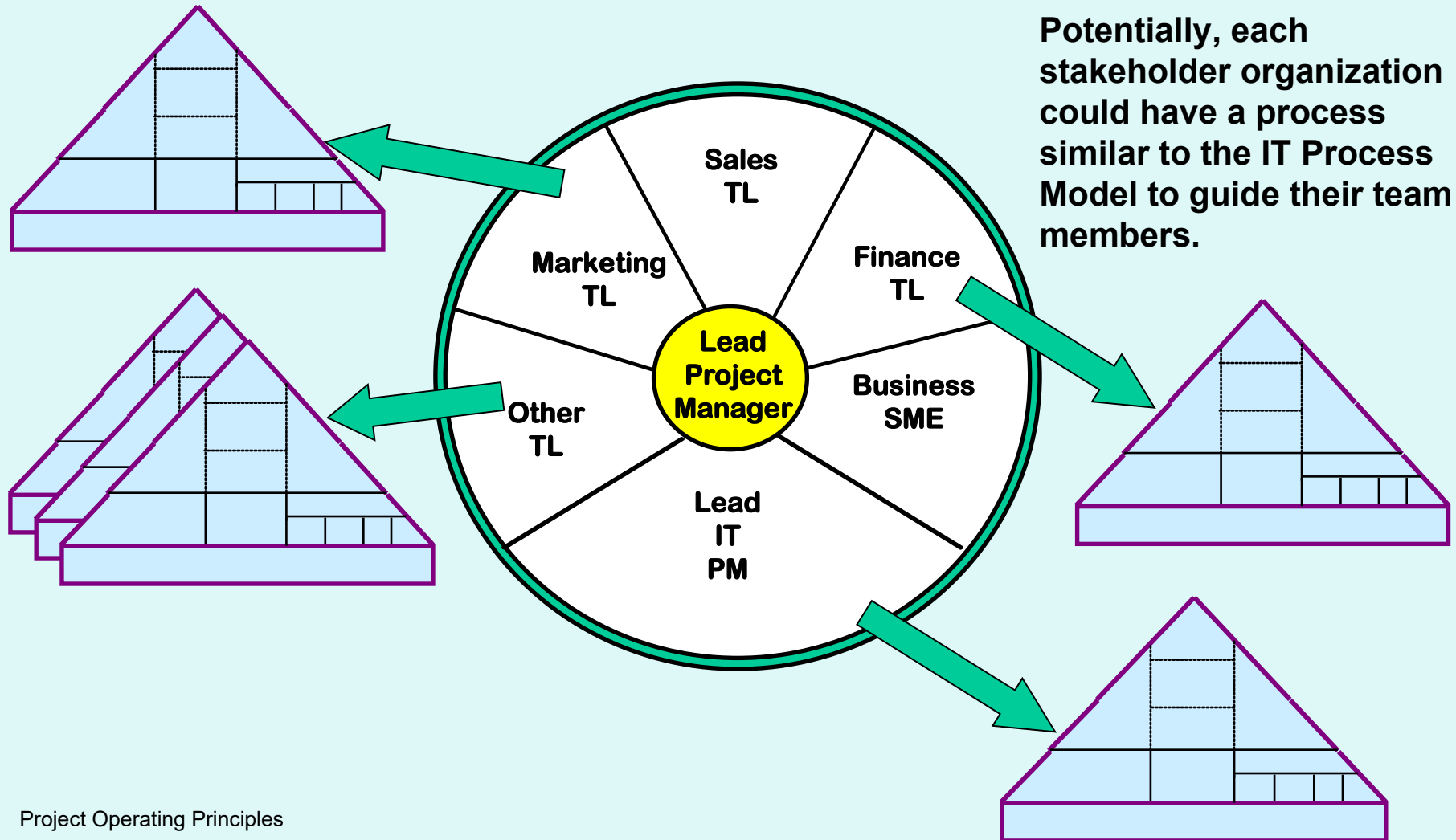
Integrating the Engagement Model and Project Solutions

- How do the Engagement model and project Solutions fit together?
- What are the changes in terminology and logistics?
 - Engagement Model roles and responsibilities
 - project structure and roles and responsibilities
 - Implications of the changes.
- How does this affect you?



Project Solutions

Role of the Lead PM





Project Solutions - Summary

Project Solutions include the following:

- ❑ **Project Solutions** – Methodology for managing projects
- ❑ **Project Gates** – Decision points
- ❑ **Project Lifecycle Phases and Sub-Phases** – Processes and deliverables.
- ❑ **Common PM Processes** – Project management deliverables
- ❑ **Project Organization** – Roles and responsibilities
- ❑ **Engagement Model** – Framework for ensuring the right people are engaged at the right time



Tools and Testing

Testing Tools – What tools are available?



An extensive collection of tools and examples should be available to Project Managers and their teams. Some of these include:

- ❖ Pre-built Microsoft Project plan templates;
- ❖ Business Case and Project Charter templates;
- ❖ Cost/benefit analysis spreadsheets;
- ❖ Issue, and risk, and change databases and logs;
- ❖ Communication plan;
- ❖ Financial Management tools;
- ❖ Deliverable templates.



Tools and Testing

Testing Methodology



A solid testing methodology and comprehensive testing processes help ensure that all projects have a seamless transition from development to production.

Supported test types for your projects include:

- ❖ **Validation tests:** Functionality, Regression, Usability, Business Process, Integration
- ❖ **Performance tests:** Load, Volume, Stress, Endurance, Network Application Analysis
- ❖ **Operations tests:** Recovery, Operations, Resource Usage
- ❖ **Configuration tests:** Configuration, Interoperability, Security, Installation & Back out

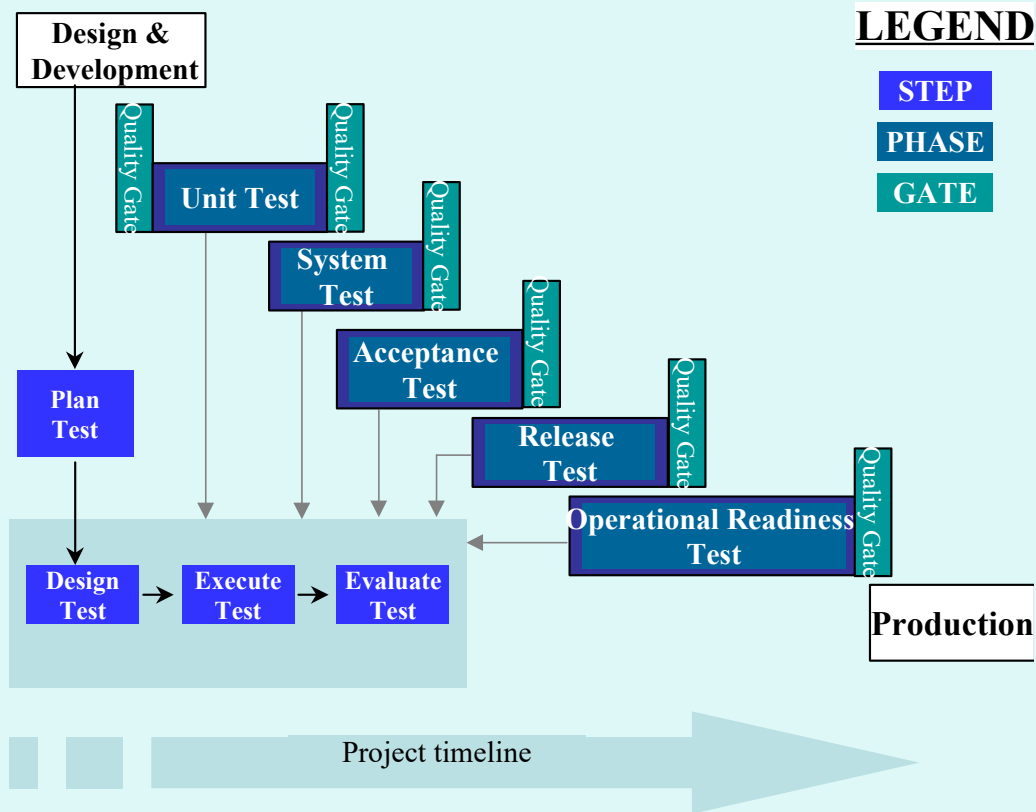


Tools and Testing

Testing Methodology



A testing approach has four test steps: Plan, Design, Execute, and Evaluate...



and five test phases: Unit, System, Acceptance, Release, and Operational Readiness Test.

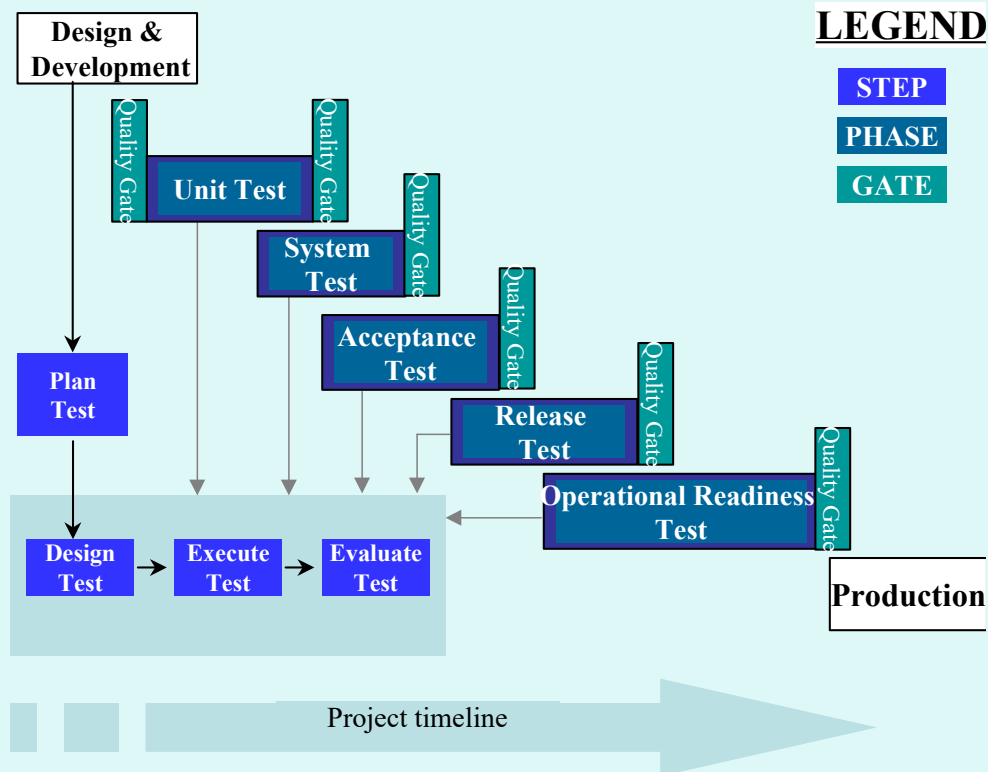


Tools and Testing

Testing Methodology



The Plan step is performed just once... All other steps are performed within each phase.



Quality Assurance gates mark the end of each phase. These ensure the testing activities are complete and organized.



Tools and Testing



Systems Community Testing



- There are 17 different Test Types

- Tests are Categorized into 4 Groups

- Different Test Types apply to Unit, System, Acceptance, Release and Operational Readiness Testing

 Test applies
 Test does not apply

Types of Tests		Unit	System	Acceptance	Release	Operational Readiness
Validation	Functionality	■	■	■	■	□
	Regression	■	■	■	■	□
	Usability	■	■	■	□	□
	Business Process	■	■	■	■	□
	Integration	□	■	■	■	□
Perform.	Load	■	■	□	■	□
	Volume	■	■	□	■	□
	Stress	■	■	□	■	□
	Endurance	■	■	□	■	□
	Network App. Analysis	■	■	□	■	□
Ops	Recovery	■	■	□	□	■
	Operations	■	■	□	■	■
	Resource Usage	■	■	□	□	■
Config.	Configuration	□	■	■	□	■
	Interoperability	□	■	■	■	■
	Security	■	■	■	■	■
	Installation & Backout	■	■	■	□	■



Tools and Testing

Training – Course List



A comprehensive selection of instructor led training courses should be available for your project team members...

Course	Duration
Project Operating Principles	2 hours
Project Management (Boot Camp)	5 days
Project Define & Initiate Sub-Phase (Business Case creation)	2-3days
Start Project Sub-Phase	2-3days
Requirements Sub-Phase	3 days
Architecture & Design Sub-Phase	3 days
Construct & Unit Test Sub-Phase	2-3days
Integrate & Test Sub-Phase	2-3days
Implement Sub-Phase	2-3days
Warranty Sub-Phase & Close Sub-Phase	2 days
Effective Project Sponsorship	2 hours

Training can mean the difference between a good project and a great project!



Tools and Testing

Summary



An extensive collection of tools and examples should be available to Project Managers and their teams. Some of these include:

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- ❖ Issue, and risk, and change databases and logs;
- ❖ Communication plan;
- ❖ Financial Management tools and
- ❖ Deliverable templates.



Project Operating Principals

*This concludes the
module on
Project Operating Principals*

