

THE GEORGE  
WASHINGTON  
UNIVERSITY  
WASHINGTON, DC

# Project Management *for Everyone*



# Contact Information

Project Management for Everyone

---

**Adam Donaldson, PMP**

Business Management & Analysis Group

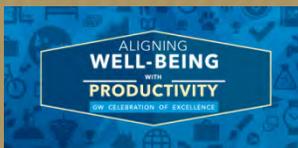
Phone: (202) 994-6867

Cell: (240) 472-2171

Email: [adonald@gwu.edu](mailto:adonald@gwu.edu)

BUSINESS MANAGEMENT  
& ANALYSIS GROUP (BMAG)

FINANCE DIVISION



THE GEORGE  
WASHINGTON  
UNIVERSITY  
WASHINGTON, DC

# Objectives

## Project Management for Everyone

---

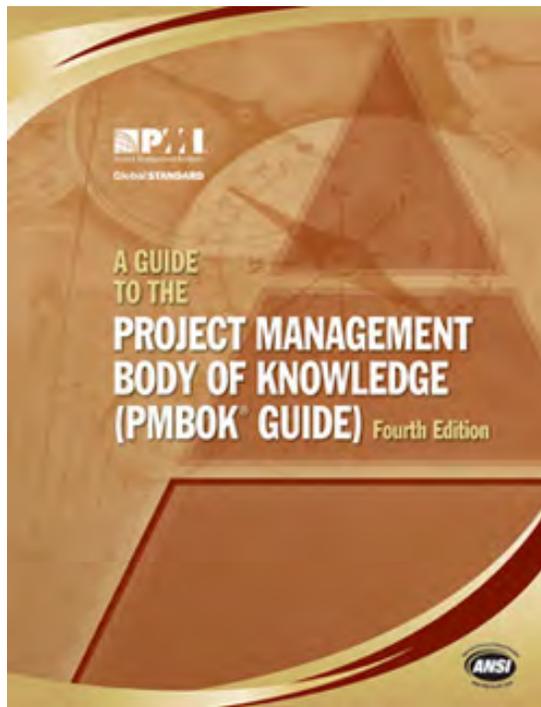
- ❑ Basic understanding of project management principles
- ❑ Share tools and techniques of formal project management that can be used in daily tasks and projects





# Project Management Institute

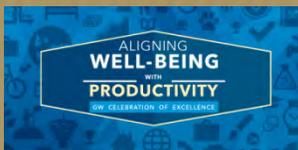
Project Management for Everyone



- ❑ PMI is an aggregation of best practices from thousands of professional project managers
- ❑ Principles in this session are based on PMI methodologies, there are other methodologies
- ❑ Organizations typically use these as a basis for developing custom project management processes



[www.pmi.org](http://www.pmi.org)



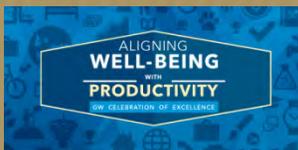
THE GEORGE  
WASHINGTON  
UNIVERSITY  
WASHINGTON, DC

# GW MS in Project Management

Project Management for Everyone



[business.gwu.edu/programs/specialized-masters/mspm/](https://business.gwu.edu/programs/specialized-masters/mspm/)



THE GEORGE  
WASHINGTON  
UNIVERSITY  
WASHINGTON, DC

# Definition of a Project

## Project Management for Everyone

**Project** - A *temporary* endeavor undertaken to create a *unique* product, service, or result.

### Temporary / Not Ongoing

- Definite beginning and end
- Does not mean a short duration

### Unique

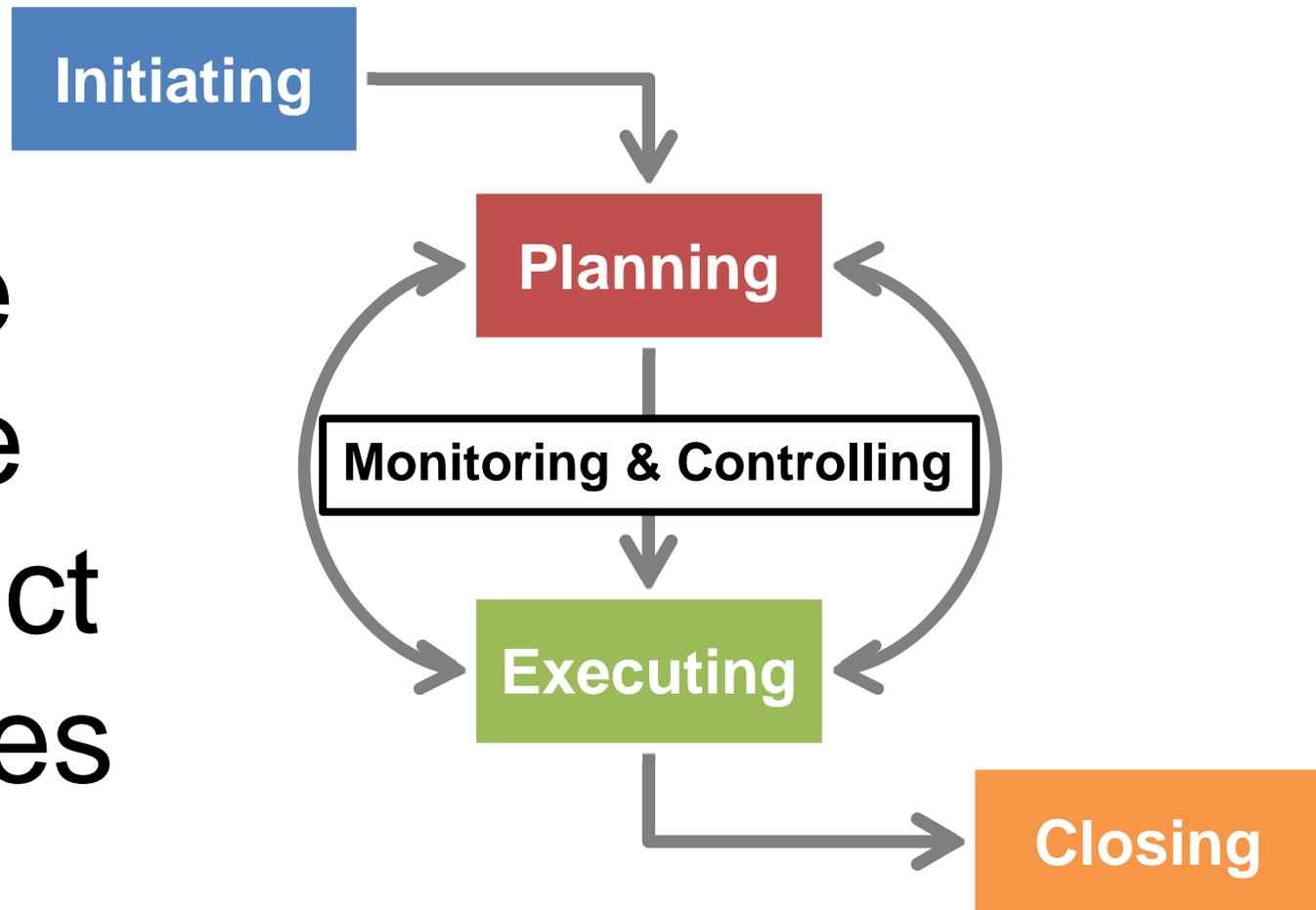
- Outcome is a unique deliverable
- Could come in the form of either products, services or results



# Project Life Cycle

Project Management for Everyone

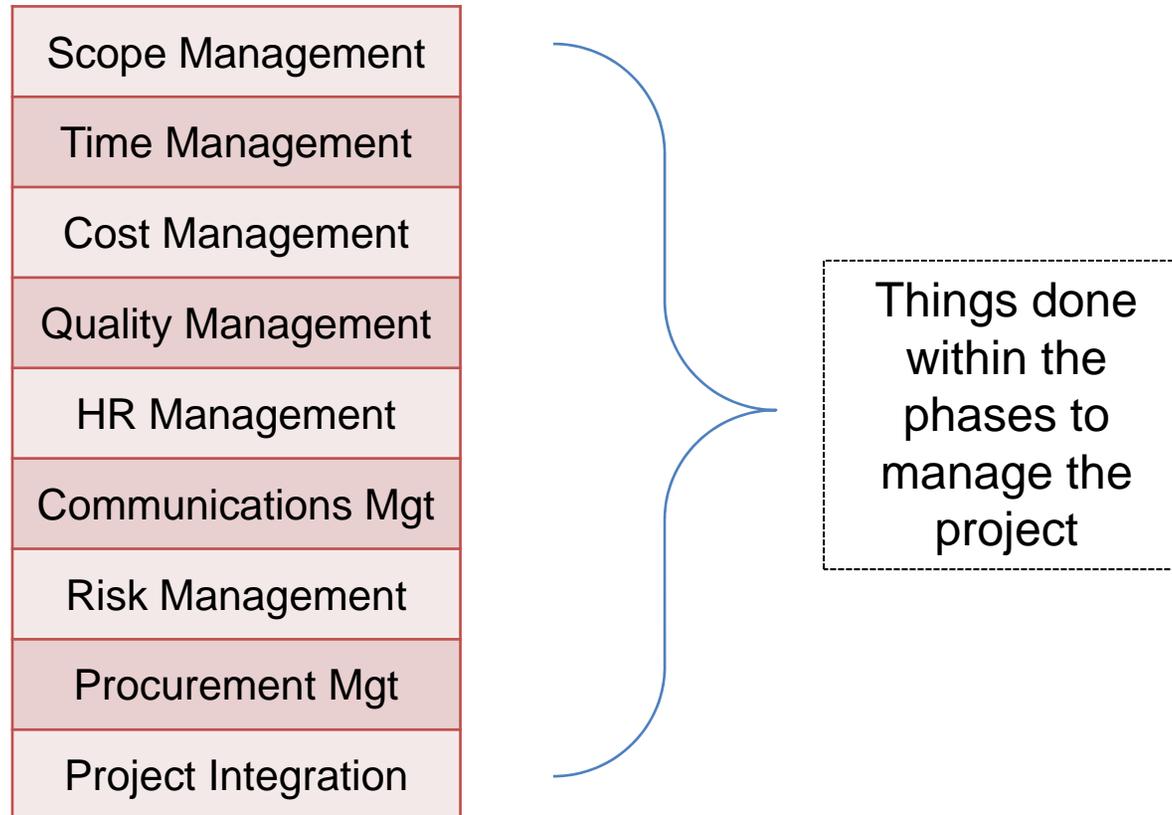
The  
Five  
Project  
Phases



# Project Management Functions

Project Management for Everyone

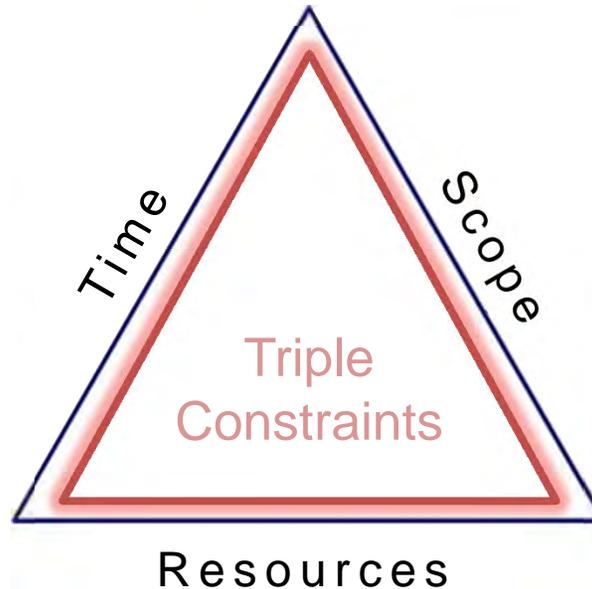
---



~ PMI refers to these as *Knowledge Areas* ~

# Triple Constraints

Project Management for Everyone



~ Managing these is the primary responsibility of the PM ~

# PM in Practical Terms

Project Management for Everyone

---

**Initiating**

**Define**

Clarify the request  
and objectives

**Planning**

**Plan**

Develop the  
specific approach

**Executing**

**Monitoring &  
Controlling**

**Manage**

Task, action,  
communication & resource management

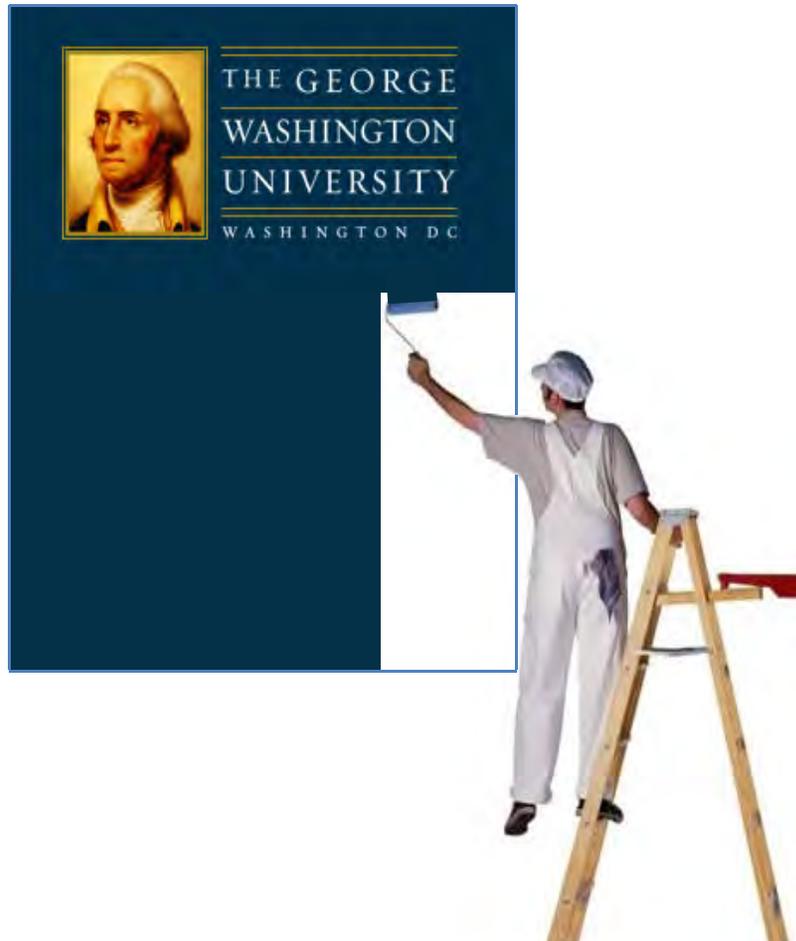
**Closing**

**Review**

Were expectations  
met?

# Day to Day Use of PM

Project Management for Everyone



*What are some struggles often experienced in projects?*

# Define

Initiating

## Project Management for Everyone

---

- ❑ Clarify the request / initiative
- ❑ Identify stakeholders
- ❑ Define the requirements



# Define - Clarification

## Project Management for Everyone

### PM Tool

#### Project Charter

The screenshot shows a project charter form. At the top left is the logo for The George Washington University. To the right, it says 'PMLC Project Management Life Cycle'. The main title is 'The George Washington University [Project Name] Project Charter'. Below this, there are several fields for project details: 'Prepared By: [Name(s) of Preparer(s)]', 'Version: [Version Number #]', 'Date: [Date]', 'Project Owner: [Name & Title of Project Owner] [Department]', and 'Process Initiator: [Name of Process Initiator] [Department] [Contact Information]'. At the bottom, there is a 'STATUS' section with three checkboxes: 'Draft' (checked), 'Pending for Document Approval', and 'Approved'. There is also an 'Unapproved' checkbox.

Defines high-level scope, exclusions, objectives, milestones & timeline

### Everyday Tool

#### Email / Memo

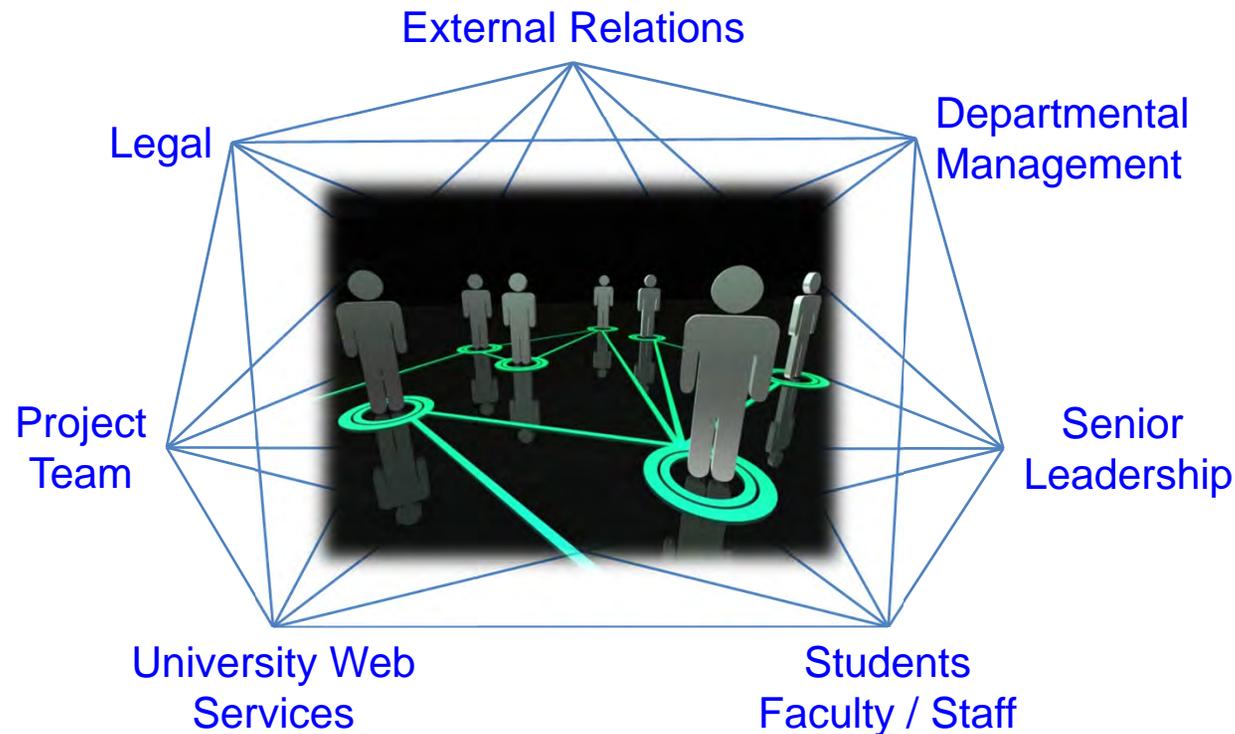
The screenshot shows an email client window. The title bar says 'Mail'. The 'Send Options' section is visible. The 'From:' field contains 'Jane Doe'. The 'To:' field is empty. The 'Subject:' field is empty. The email body is empty. The status bar at the bottom shows 'Name', 'Size', 'Type', and 'Msg'.

- Document objectives
- Send to requester to validate
- Writing down helps clarify
- Get agreement!!

# Define - Identify Stakeholders

## Project Management for Everyone

Project Stakeholder { *People or groups positively or negatively affected by the project outcome.*



*Stakeholders may or may not exert direct influence over the project*

# Define - Identify Stakeholders

Project Management for Everyone

PM Tool

Everyday Tool

## Stakeholder Matrix

Name	Title	Department	Category	Contact	Impact (H/M/L)	Influence (H/M/L)
Adam Donaldson	Manager	Business Management & Analysis Group	Project Team	202-994-6867 adonald@gwu.edu	H	M
Dave Green	Executive Director	Business Management & Analysis Group	Project Owner	202-994-4151 dbgreen@gwu.edu	M	M
John Doe	Director	Division of IT	Web Development	202-555-1212 john_doe@gwu.edu	H	M
Jane Doe	Manager	External Relations	Content Validation	703-555-1212 jane_doe@gwu.edu	L	H

- Identify and track key stakeholders
- Determine Impact & Influence to gauge how to manage
- Ensure thoroughness of communications planning

# Define - Requirements

Project Management for Everyone

## PM Tool

### Requirements Document

THE GEORGE WASHINGTON UNIVERSITY  
PMLC  
Project Management Life Cycle

**The George Washington University**  
[Project Name]  
**Business Requirements Document**

Prepared By: (Name(s) of Preparer(s))  
Version: (Version Number #.#)  
Date: (Date)  
Project Owner: (Name & Title of Project Owner) (Department)  
Project Manager: (Name of Project Manager) (Department) (Contact Information)

STATUS:  Not Approved  
 Pending for Document Approval  
 Approved  
 Rejected

Documents the “what” of the initiative / task and breaks into individually deliverable items

## Everyday Tool

### Requirements List

#	Requirement Name / Description	Category
1	Department web page modifications shall conform to design standards set forth by External Relations	Design
2	News and home page content updates will include information and occurrences which have happened within the previous 6 months	Content
3	Department managers will approve all content and design modifications	Governance
4	Organization chart and contact information shall be validated and made current as of the date of publishing to the web site.	Content
5	Time and date of the last update shall be displayed to the users	Content

- List the “what” items required in the final solution
- Iterative process often requiring multiple interviews
- Critical to defining the solution

# Define

Initiating

## Project Management for Everyone

---

- ☑ Clarification Memo
- ☑ Stakeholder Matrix
- ☑ Requirements List



# Plan

Planning

## Project Management for Everyone

---

- ❑ Organize and plan
- ❑ Determine tasks to be done
- ❑ Create a schedule
- ❑ Plan communications

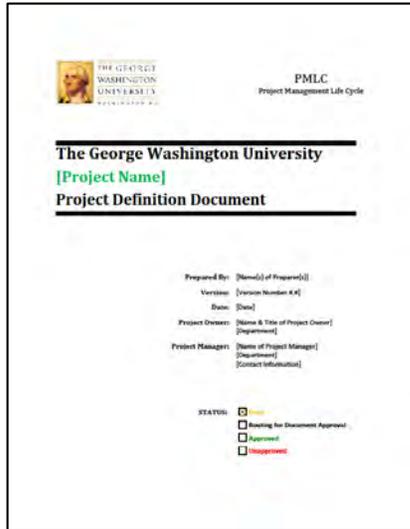


# Plan – Project Management Plan

Project Management for Everyone

PM Tool

Project Management Plan



Establishes plan for planning, execution, monitoring & closing, including all subsidiary plans

Everyday Tool

Project Workbook

The image is a screenshot of a Microsoft Excel spreadsheet. The title bar reads 'Example Project Workbook - Microsoft Excel'. The ribbon shows 'Home', 'Insert', 'Page Layout', 'Formulas', 'Data', 'Review', 'View', 'Developer', and 'Acrobat'. The spreadsheet has four columns: A, B, C, and D. Column A is labeled '#', B is 'Requirement Name / Description', C is 'Category', and D is 'Benefit'. There are four rows of data:

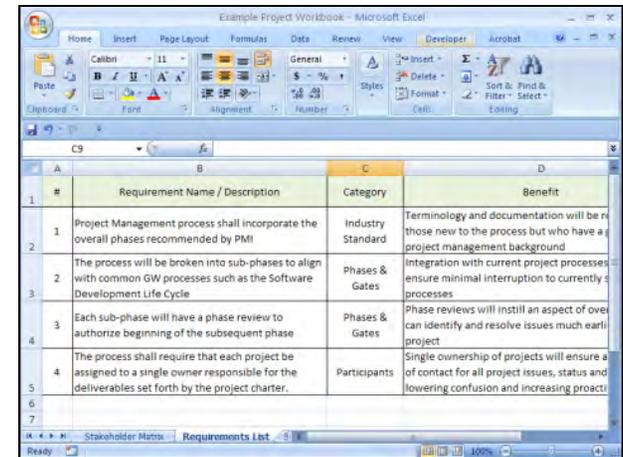
#	Requirement Name / Description	Category	Benefit
1	Project Management process shall incorporate the overall phases recommended by PMI	Industry Standard	Terminology and documentation will be re those new to the process but who have a g project management background
2	The process will be broken into sub-phases to align with common GW processes such as the Software Development Life Cycle	Phases & Gates	Integration with current project processes ensure minimal interruption to currently s processes
3	Each sub-phase will have a phase review to authorize beginning of the subsequent phase	Phases & Gates	Phase reviews will instill an aspect of over can identify and resolve issues much earli project
4	The process shall require that each project be assigned to a single owner responsible for the deliverables set forth by the project charter.	Participants	Single ownership of projects will ensure a of contact for all project issues, status and lowering confusion and increasing proacti



# “Project” Workbook

## Project Management for Everyone

- Include all “project” information
  - Scope / Objectives
  - Stakeholders / Contacts
  - Requirements
  - Schedule, Milestones & Deliverables
  - Action Items and Issues
- Central location for all project info
  - Excel workbook or other similar tool
  - Local / Shared Folder
- Living document
- Serves as a template / historical artifact for similar future endeavors



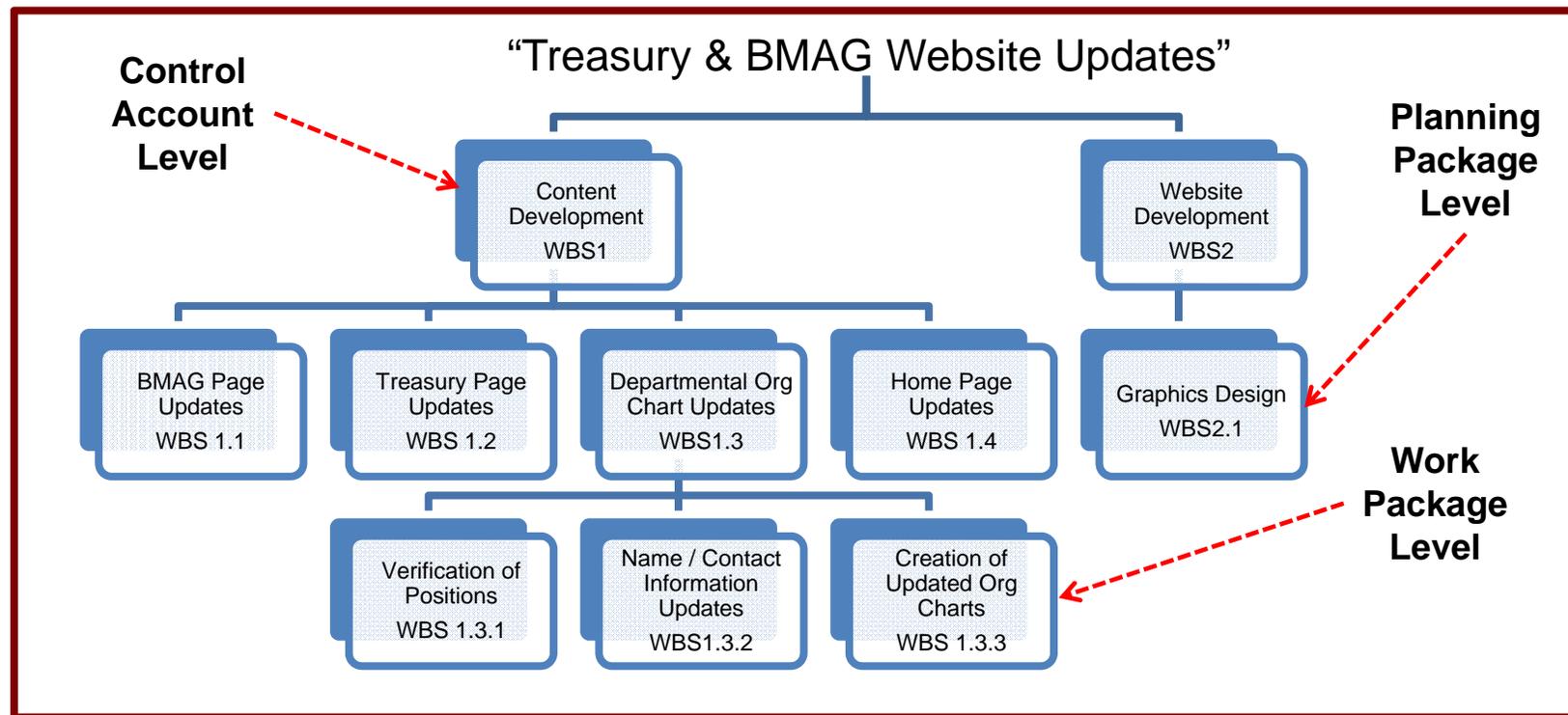
#	Requirement Name / Description	Category	Benefit
1	Project Management process shall incorporate the overall phases recommended by PMI	Industry Standard	Terminology and documentation will be re those new to the process but who have a project management background
2	The process will be broken into sub-phases to align with common GW processes such as the Software Development Life Cycle	Phases & Gates	Integration with current project processes ensure minimal interruption to currently s processes
3	Each sub-phase will have a phase review to authorize beginning of the subsequent phase	Phases & Gates	Phase reviews will instill an aspect of over can identify and resolve issues much earli project
4	The process shall require that each project be assigned to a single owner responsible for the deliverables set forth by the project charter.	Participants	Single ownership of projects will ensure a of contact for all project issues, status and lowering confusion and increasing proacti

# Plan – Work Breakdown Structure

Project Management for Everyone

PM Tool

Everyday Tool



- Breaks deliverables into manageable work packages

- Ensures we don't forget or omit important tasks

# Plan – Schedule

## Project Management for Everyone

PM Tool

Formal Project Schedule

WBS	Task Name	Duration	Start	Finish
0	Open Enrollment 2011	89 days	Tue 7/13/10	Fri 11/12/10
1	Communications	64 days	Tue 7/13/10	Fri 10/8/10
1.1	Posters	37 days	Tue 7/27/10	Wed 9/15/10
1.2	Postcards/Mailings	29 days	Tue 7/27/10	Fri 9/3/10
1.3	Email	58 days	Tue 7/13/10	Thu 9/30/10
1.3.1	Initial Email	36 days	Tue 7/13/10	Tue 8/31/10
1.3.2	First Reminder	37 days	Tue 7/27/10	Wed 9/15/10
1.3.3	Last Reminder	38 days	Tue 8/10/10	Thu 9/30/10
1.4	Meetings/Seminars	54 days	Tue 7/27/10	Fri 10/8/10
2	BeneDetails Website	63 days	Wed 8/18/10	Fri 11/12/10

Everyday Tool

Task List / Schedule

ID	Task	Start	Finish	Deadline	Work	Duration	% Complete	Predecessors	Resource
1	Verification of Positions	3-Nov	5-Nov	10-Nov	4 hrs	2 days	10%		Jane Doe
2	Name / Contact Info Updates	5-Nov	8-Nov	11-Nov	2 hrs	1 day	0%	1	Jane Doe
3	Creation of Updated Org Charts	9-Nov	12-Nov	17-Nov	16 hrs	4 days	0%	2	John Doe

Sequences & defines project tasks  
and monitors status of project against  
milestones / baselines



# Plan – Schedule

## Project Management for Everyone

### Task List / Schedule

ID	Task	Start	Finish	Deadline	Work	Duration	% Cmpl	Predecessors	Resource
1	Verification of Positions	3-Nov	5-Nov	-	4 hrs	2 days	10%		Jane Doe
2	Name / Contact Info Updates	5-Nov	8-Nov	-	2 hrs	1 day	0%	1	Jane Doe
3	Creation of Updated Org Charts	9-Nov	12-Nov	-	16 hrs	4 days	0%	2	John Doe
4	Receive approval from dept Director on Org Chart updates	15-Nov	16-Nov	-	2 hrs	2 days	0%	3	Adam Donaldson
5	Upload of Org Charts onto Web	17-Nov	17-Nov	18-Nov	2 hrs	0.25 days	0%	4	Jane Doe

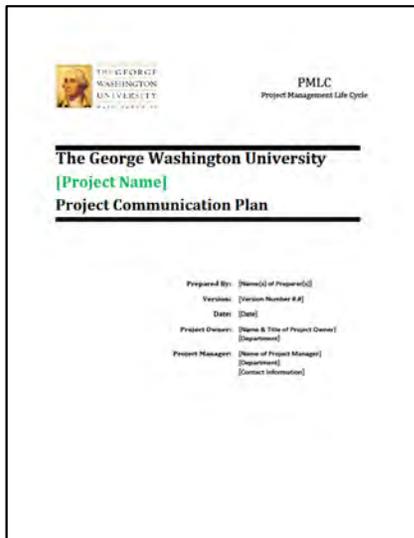
- Excel or other common tool
- Turn WBS work packages into tasks
- Clearly identify major milestones
- Identify dependencies – one task which relies on another

# Plan – Communications Matrix

Project Management for Everyone

PM Tool

Communications Plan



Documents the detailed plan for communicating with all stakeholders

Everyday Tool

Communications Matrix

The image is a screenshot of a Microsoft Excel spreadsheet titled 'Example Project Workbook - Microsoft Excel'. The spreadsheet displays a Communications Matrix with the following data:

#	Communication	Medium	Delivery Date	Frequency	Audience	Reviewer	Owner	Status
1	Notification of department heads efforts to update web	Email	5-Nov	One-Time	Directors in Finance	Jane Doe	John Doe	Open
2	Solicitation to entire department for content	Email	8-Nov	One-Time	Finance	Jane Doe	John Doe	Open
3	Communicate changes to UWS / External Relations	Meeting	12-Nov	Bi-Weekly	IT, External Relations	N/A	Adam Donaldson	Open
4	Department web content update review	Meeting	8-Nov	Weekly	Finance	N/A	Adam Donaldson	Open
5	Status Report	Memo	9-Nov	Weekly	Finance SAVP	John Smith	Jane Doe	Open



# Plan – Communications Matrix

## Project Management for Everyone

### Communications Matrix

#	Communication	Medium	Delivery Date	Frequency	Audience	Reviewer	Owner	Status
1	Notification of department heads of efforts to update web	Email	5-Nov	One-Time	Directors in Finance	Jane Doe	John Doe	Open
2	Solicitation to entire department for content	Email	8-Nov	One-Time	Finance	Jane Doe	John Doe	Open
3	Communicate changes to UWS / External Relations	Meeting	12-Nov	Bi-Weekly	IT, External Relations	N/A	Adam Donaldson	Open
4	Department web content update review	Meeting	8-Nov	Weekly	Finance	N/A	Adam Donaldson	Open
5	Status Report	Memo	9-Nov	Weekly	Finance SAVP	John Smith	Jane Doe	Open

- Target communications towards stakeholders identified
- Consider both “internal” and “external” communications
- One of the most vital efforts in any project

# Plan

Planning

## Project Management for Everyone

---

- ☑ Project Workbook
- ☑ Work Breakdown Structure (WBS)
- ☑ Task List / Schedule
- ☑ Communications Matrix



# Manage

## Project Management for Everyone

Executing

Monitoring

- ❑ Executing schedule tasks
- ❑ Managing action items & issues
- ❑ Report status



# Manage – Actions & Issues

Project Management for Everyone

PM Tool

Everyday Tool

## Action & Issues Register

Action #	Priority	Description	Owner	Open Date	Est Complete Date	Status	Close Date
32	Med	Check with Dave on the direction we want to go for language on the home page	Adam	10/20/11	10/26/11	Open	
33	Med	Verify that we can do rotating pictures and bios on the "about us" page	Bill	10/15/11	10/29/11	Open	
34	High	Setup meeting with SAVP to receive approval on overall design.	Dave	10/15/11	11/5/11	Open	
35	Low	Gather bios and pictures from each team member for "about us" page	Adam	10/20/11	11/15/11	Open	
36	Med	Verify that organization charts can be completed by the required deadline.	Adam	10/20/11	11/2/11	Open	
37	Med	Setup meeting with External Relations to review the overall design	Dave	10/20/11	11/19/11	Open	

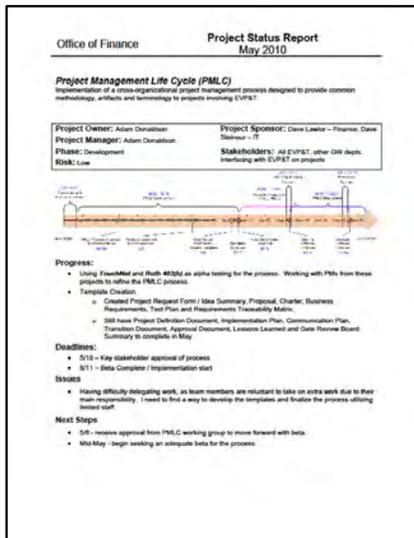
- Log and track all actions and issues – ensures accountability
- Tasks are scheduled – Action Items “pop up”

# Communicate – Status Report

## Project Management for Everyone

PM Tool

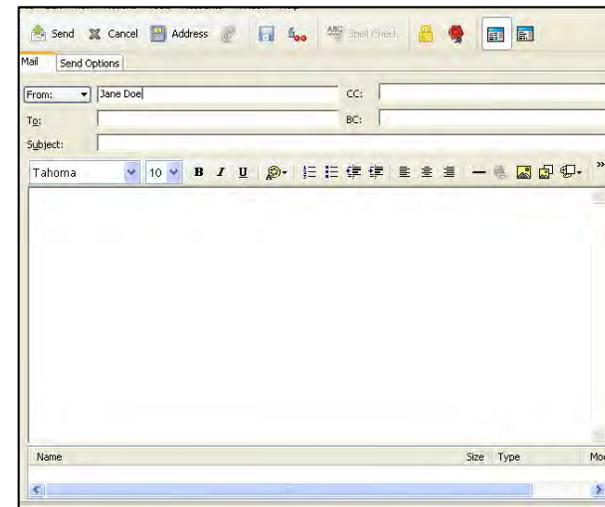
Project Status Report



Provides succinct information conveying timelines, progress, issues & next steps

Everyday Tool

Email / Memo



# Communicate – Status Report

## Project Management for Everyone

Office of Finance

### Project Status Report May 2010

---

**Project Management Life Cycle (PMLC)**  
Implementation of a cross-organizational project management process designed to provide common methodology, artifacts and terminology to projects involving EVP&T.

<b>Project Owner:</b> Adam Donaldson	<b>Project Sponsor:</b> Dave Lawlor – Finance, Dave Steinour – IT
<b>Project Manager:</b> Adam Donaldson	
<b>Phase:</b> Development	<b>Stakeholders:</b> All EVP&T, other GW depts. Interfacing with EVP&T on projects
<b>Risk:</b> Low	

**Progress:**

- Using *TouchNet* and *Roth 403(b)* as alpha testing for the process. Working with PMs from these projects to refine the PMLC process.
- Template Creation
  - Created Project Request Form / Idea Summary, Proposal, Charter, Business Requirements, Test Plan and Requirements Traceability Matrix.
  - Still have Project Definition Document, Implementation Plan, Communication Plan, Transition Document, Approval Document, Lessons Learned and Gate Review Board Summary to complete in May

**Deadlines:**

- 5/18 – Key stakeholder approval of process
- 8/11 – Beta Complete / Implementation start

**Issues**

- Having difficulty delegating work, as team members are reluctant to take on extra work due to their main responsibility. I need to find a way to develop the templates and finalize the process utilizing limited staff.

**Next Steps**

- 5/8 - receive approval from PMLC working group to move forward with beta.
- Mid-May - begin seeking an adequate beta for the process.

- Description
- Timeline
- Progress
- Deadlines
- Issues
- Next Steps

# Manage

## Project Management for Everyone

Executing

Monitoring

- ☑ Schedule & Project Workbook
- ☑ Action & Issues Register
- ☑ Status Report



# Review

Closing

## Project Management for Everyone

---

- Discuss what went right & wrong
- Hold final review

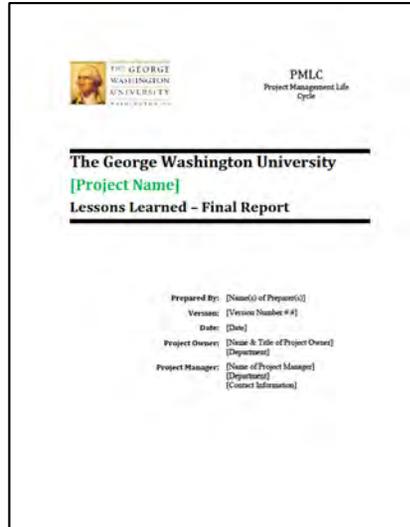


# Review – Lessons Learned

## Project Management for Everyone

### PM Tool

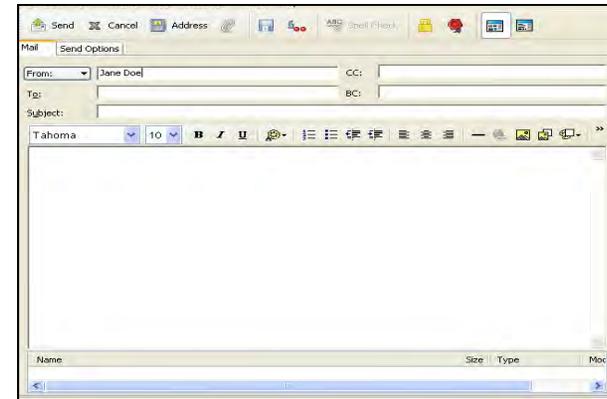
#### Lessons Learned Document



Formally documents lessons learned throughout the project by phase

### Everyday Tool

#### Email / Memo



- Gather key participants to discuss lessons learned
- Capture important lessons which could help others engaged in similar activity

# Review – Final Review

## Project Management for Everyone

PM Tool

Project Approval Document

**The George Washington University**  
PMLC  
Project Management Life Cycle

**The George Washington University**  
[Project Name]  
Project Transition Document

Prepared By: [Name(s) of Preparer(s)]  
Version: [Version Number #.#]  
Date: [Date]  
Project Owner: [Name & Title of Project Owner]  
[Department]  
Project Manager: [Name of Project Manager]  
[Department]  
[Contact Information]

STATUS:  Draft  
 Pending for Document Approval  
 Approved  
 Unapproved

Documents formal signature  
approval of the project

Everyday Tool

Review of Project Workbook

#	Requirement Name / Description	Category	Benefit
1	Department web page modifications shall conform to design standards set forth by External Relations	Design	Overall layout and color scheme will be consistent with GW standards and will continue to be easily updated
2	News and home page content updates will include information and occurrences which have happened within the previous 6 months	Content	Information contained on the front page needs to be timely and current in order to encourage users to continually return
3	Department managers will approve all content and design modifications	Governance	Ensures all web site updates have been agreed upon by the entire department
4	Organization chart and contact information shall be validated and made current as of the date of publishing to the web site.	Content	Provides the most current organization information possible to users of the web site
5	Time and date of the last update shall be displayed to the users	Content	Allows users to understand the currency of the information being presented



# Review – Final Review

## Project Management for Everyone

	A	B	C	D
1	#	Requirement Name / Description	Category	Benefit
2	1	Department web page modifications shall conform to design standards set forth by External Relations	Design	Overall layout and color scheme will be consistent with GW standards and will continue to be easily updated
3	2	News and home page content updates will include information and occurrences which have happened within the previous 6 months	Content	Information contained on the front page needs to be timely and current in order to encourage users to continually return
4	3	Department managers will approve all content and design modifications	Governance	Ensures all web site updates have been agreed upon by the entire department
5	4	Organization chart and contact information shall be validated and made current as of the date of publishing to the web site.	Content	Provides the most current organization information possible to users of the web site
6	5	Time and date of the last update shall be displayed to the users	Content	Allows users to understand the currency of the information being presented

- Review objectives & requirements
- Review lessons learned
- Discuss plan to close open actions

# Review

Closing

## Project Management for Everyone

---

- ☑ Lessons Learned
- ☑ Project Workbook

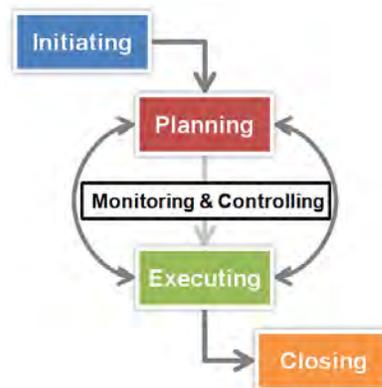
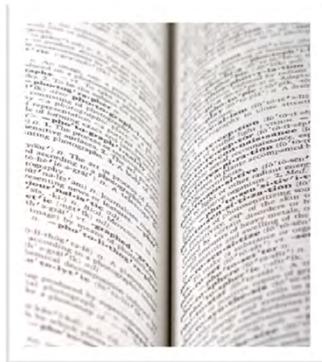


# Summary

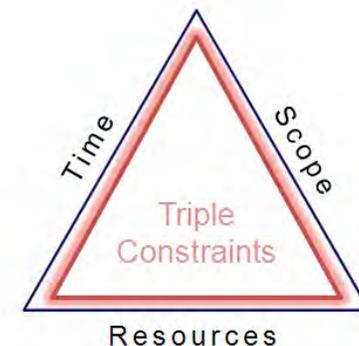
## Project Management for Everyone

### ✓ Project Management Concepts

- Definition of a project
- Project Lifecycle
- Project Management Functions
- Triple Constraints



Scope Management
Time Management
Cost Management
Quality Management
HR Management
Communications Mgt
Risk Management
Procurement Mgt
Project Integration



# Summary

## Project Management for Everyone

### *Project tools for everyday tasks & projects*

- Define

Initiating

- Clarification Memo
- Stakeholder Matrix
- Requirements List

- Plan

Planning

- Project Workbook
- Work Breakdown Structure
- Schedule
- Communications Matrix

- Manage

Executing

Monitoring & Controlling

- Schedule / Proj Workbook
- Actions & Issues Register
- Status Report

- Review

Closing

- Lessons Learned
- Project Workbook

# Questions

Project Management for Everyone

---



# Thank You!!!

Project Management for Everyone

---

**Adam Donaldson, PMP**

Business Management & Analysis Group

Phone: (202) 994-6867

Cell: (240) 472-2171

Email: [adonald@gwu.edu](mailto:adonald@gwu.edu)

