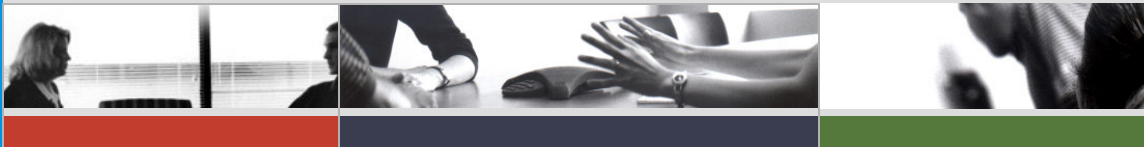


# Immediate Benefits By Implementing 4 Key Project Management Processes for Your Existing Projects



It's your Business. Expect More.™

PMI Tallahassee Chapter  
June 6, 2005  
Presented by Jim Kuncis  
The North Highland Company

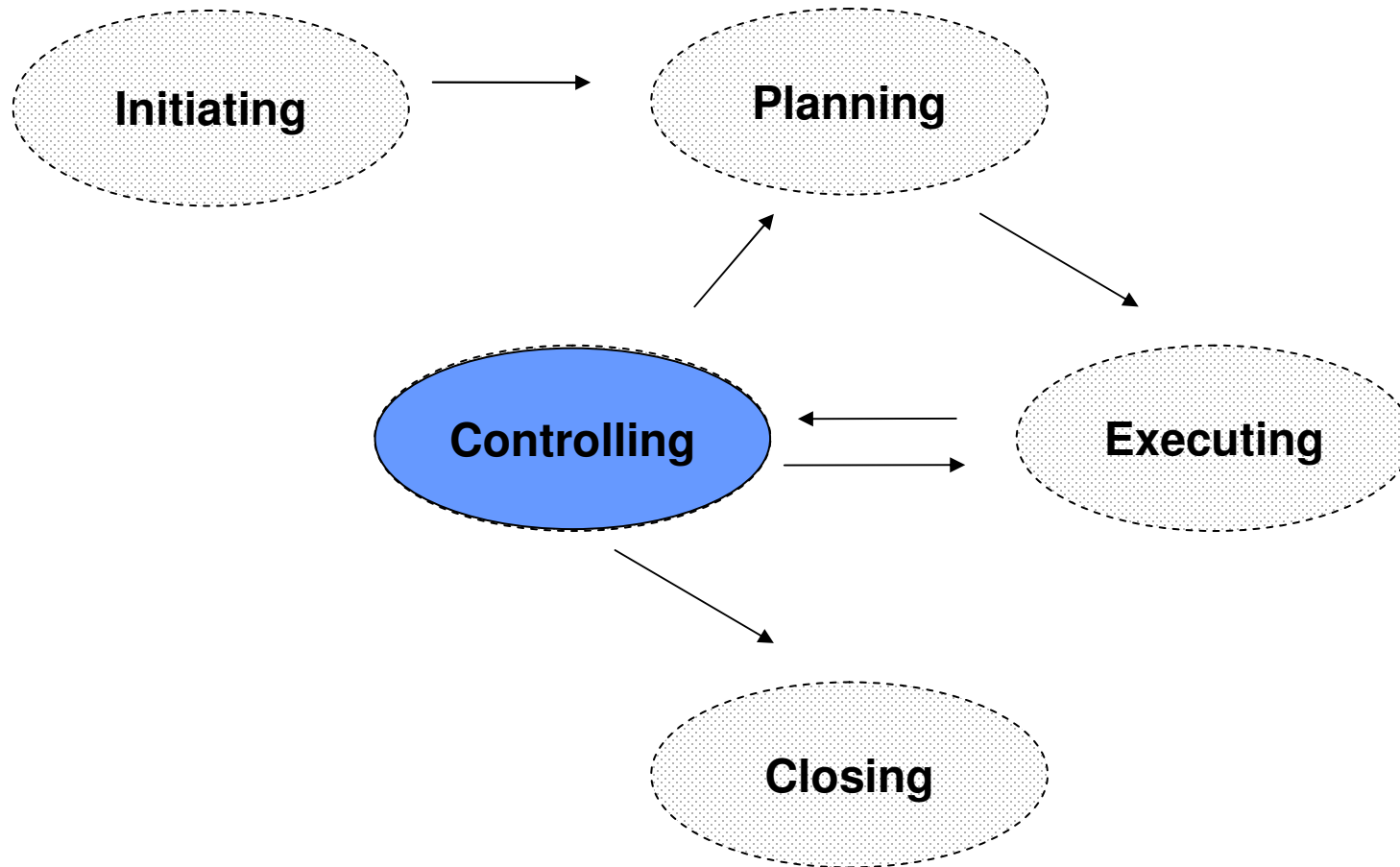


# Immediate Benefits By Implementing 4 Key Project Management Processes for Your Existing Projects

## ▶ Agenda

- > PMBOK Basics
- > The Four Key Project Controlling Processes
- > Recipe for Success
- > Questions

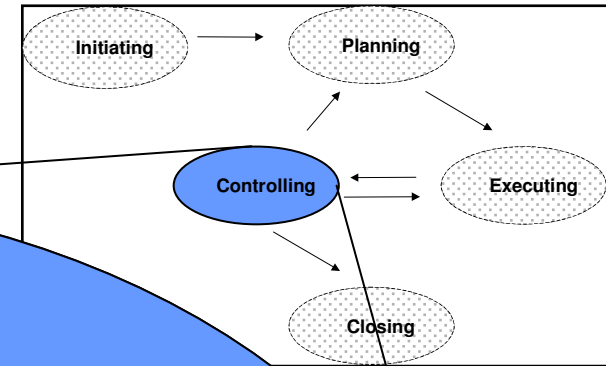
## PMBOK Basics



When Controlling, where should I spend my time?



## The 4 Key Controlling Processes

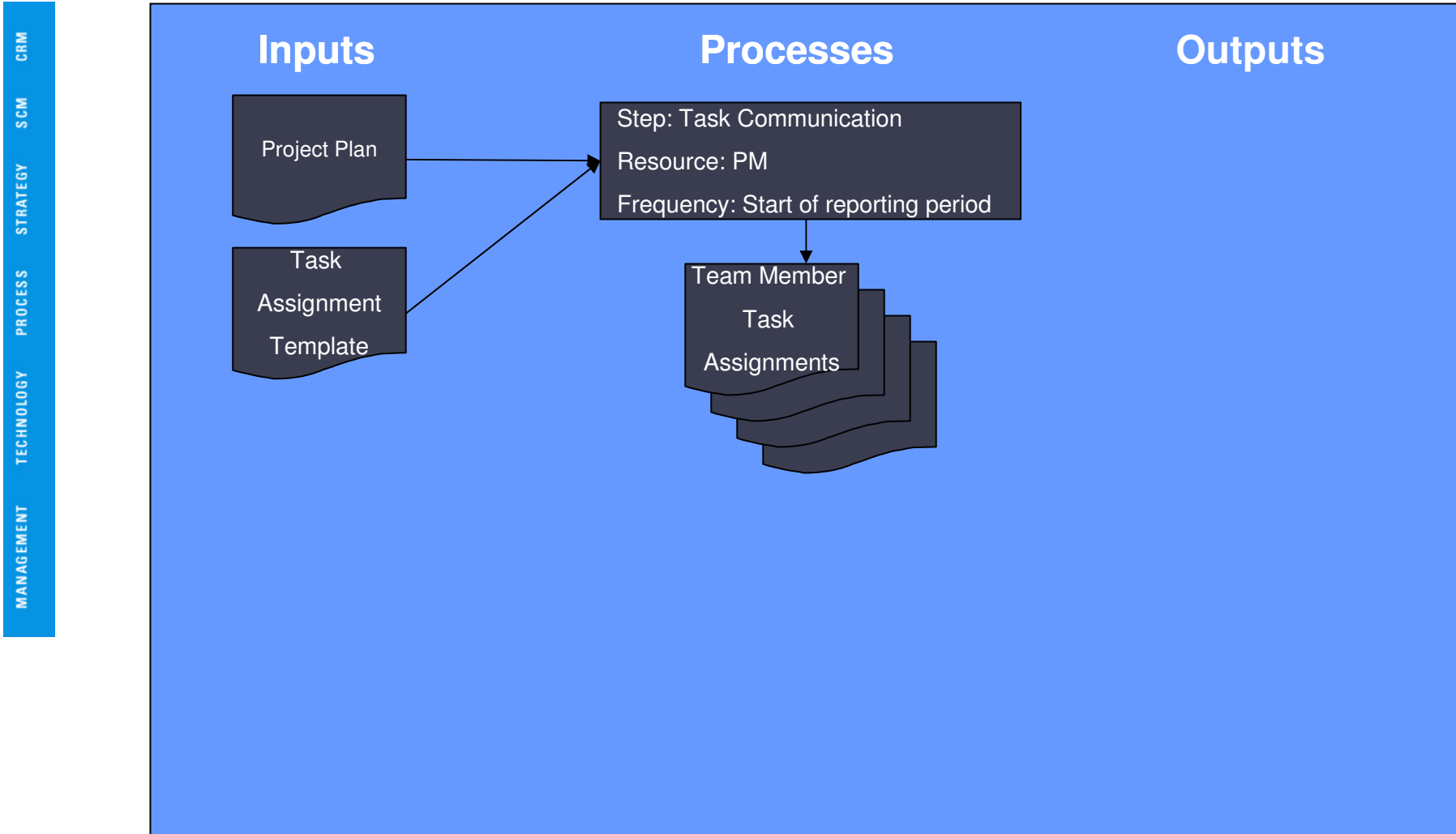


# Controlling

- Task Tracking
- Project Plan Maintenance
- Issue Tracking
- Status Reporting



# “Capture It or Loose It” – Task Tracking



# Team Member Task Assignment

		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R			
1	Java Joe	Interactive Cup Holder	Project Time																			
2			27	28	29	30	45															
3			Holder Manipulation Object Development	Holder Manipulation Object Unit Testing	Cup Object Development	Cup Object Testing	Weekly Status Reporting															
4			Due	6/5	6/6	6/7	6/9	6/30												Weekly Project Total		
5	Sunday	4-Jun																			-	
6	Monday	5-Jun																				-
7	Tuesday	6-Jun																				-
8	Wednesday	7-Jun																				-
9	Thursday	8-Jun																				-
10	Friday	9-Jun																				-
11	Saturday	10-Jun																				-
12	Task Total			-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-		-	
13	Estimate to Complete																					

# Pretty Simple, Huh?



Let's take a look at our PM's thoughts through the years

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1																		
2				27	28	29	30	45										
	Project Time																	
	<b>PM's Thoughts (1992)</b>																	
	<b>“My project plan has so many tasks, it will take me forever to record actuals”</b>																	
3	Java Joe	Interactive Cup In...		Holder Manipulation Ob...	Holder Manipulation Ob...	Cup Object Development	Cup Object T...	Weekly Status Report										
4			Due >	6/5	6/6	6/7	6/8	6/30										
	<b>PM's Thoughts (2005)</b>																	
	<b>“My project plan has so many tasks, it will take me forever to record actuals”</b>																	
5	Monday	6-Jun																
6	Tuesday	7-Jun																
7	Wednesday	8-Jun																
8	Thursday	9-Jun																
9	Friday	10-Jun																
10	Saturday	11-Jun																
11	Task Total																	
12																		
13																		
14	Estimate to Complete																	
15																		

**Pretty Simple, Huh?**



## Survey

**How many line items do you have in your current project plan?**

**a) 1 - 50**

**b) 51 - 500**

**c) Greater Than 500**



## Quiz

What is the “ideal” number of line items in a work plan?

- a) 1 - 50
- b) 51 - 500
- c) Greater Than 500
- d) It depends**

**“Right-size” your plan so that you have the  
MINIMUM  
number of line items required to  
SUCCESSFULLY  
manage your plan**



## Word Problem: Large Multi-Campus Hospital Process Improvement Initiative

5 Step Methodology (Current State, Metrics, Analysis, Opportunities, Future State)  
4 Tasks per Methodology Step (Plan/Prep, Brainstorm, Consolidate, Document)  
10 Departments (Nursing, Emergency, Pharmacy, Radiology, LAB, etc...)  
20 Processes per Department  
20 Week Implementation Timeline  
1 Project Manager

**How many manageable line items in the work plan?**

**Answer:**

$$5 * 4 * 10 * 20 = 4,000 \text{ Tasks}$$

**How many line items must be managed per week the manager?**

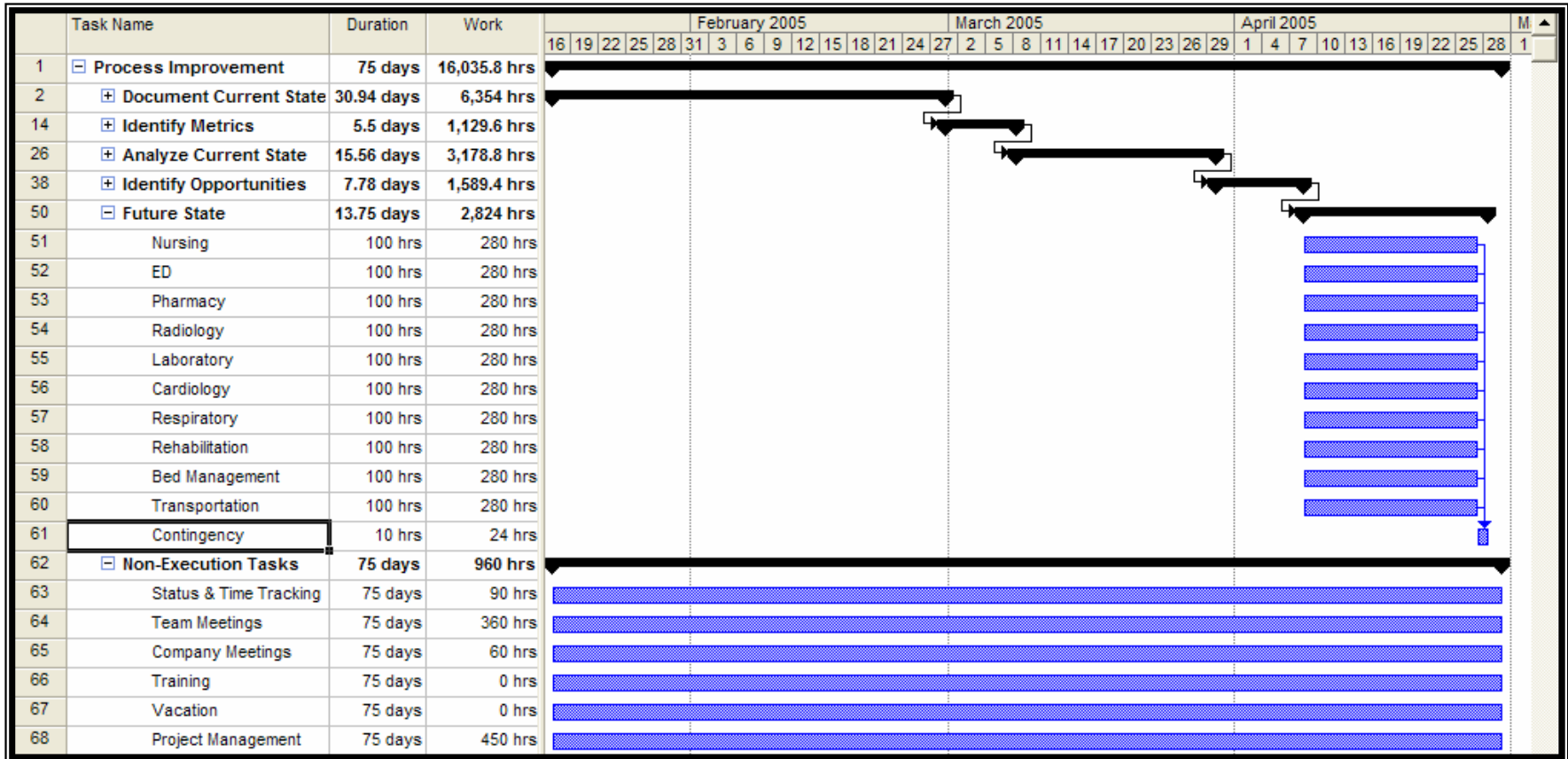
**Answer:**

$$4,000 \text{ Tasks}/20 \text{ Weeks} = 200 \text{ Tasks/Week}$$



# One Approach:

MANAGEMENT  
TECHNOLOGY  
PROCESS  
STRATEGY  
SCM  
CRM



**What happened to the remaining 3,932 line items?**

**Answer: Team member task lists**

# Team Member Task Lists (embedded in Task Assignment Document)

CRM  
SCM  
STRATEGY  
PROCESS  
TECHNOLOGY  
MANAGEMENT

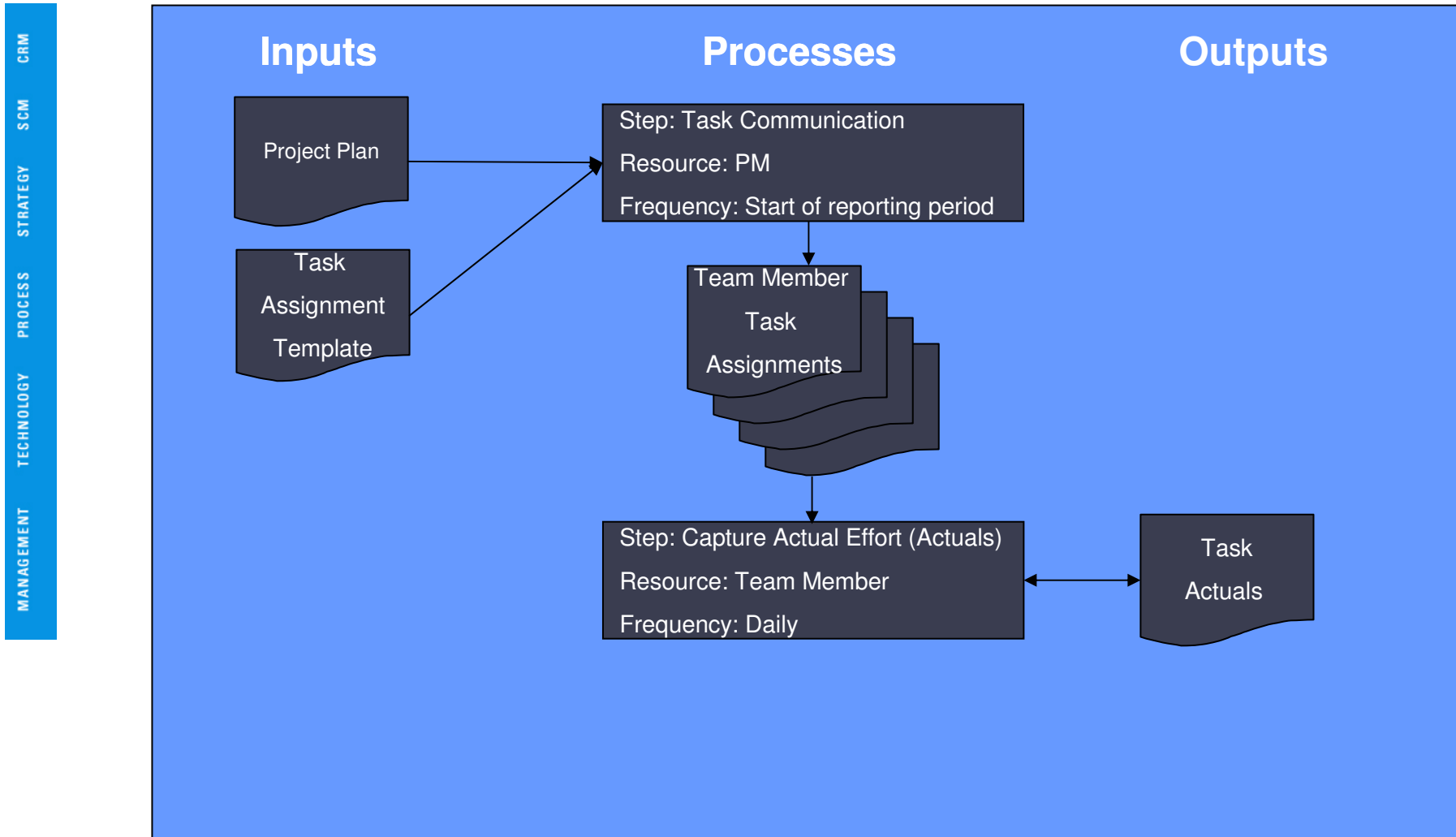
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D99 fx																				
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	ED Process SME			Week 1							Week 1		Week 2							We
2				Actual Work							Actual	ETC	Actual Work							Actua
3	Task	Baseline	Actual	Sun	Mon	Tue	Wed	Thur	Fri	Sat	Total		Sun	Mon	Tue	Wed	Thur	Fri	Sat	Total
-	4	Current State - ED	250	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	45	SP #9: Psychiatric Disposition	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	50	SP #10: Flight Medicine Sub-Process	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	55	SP #11: Patient follow-up after ED Discharge	8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	60	SP #12: System Downtime	8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	65	SP #13: Use of generic Physician in ED	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	70	SP #14: Admissions Sub-Process	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	75	SP #15: Medications Management Sub-Process	20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	80	SP #16: ED Pre-Code Purple Escalation Plan Sub-Process	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
+	85	SP #17: Code Purple Sub-Process	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
-	90	SP #18: Regulatory Audits & Clinical/Operational Management Reporting	12	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
.	91	Plan/Prep	1	0							0									
.	92	Brainstorm	5	0							0									
.	93	Consolidate	5	0							0									
.	94	Document	1	0							0									



# Recipe For Success

## 1) Right-size your plan

# “Capture It or Loose It” – Task Tracking





## Task Actuals – Oh the pain!!!!!!

PM: “Team, I need you to track actuals”

Team (1992): “What value does it bring, I am going to spend a significant amount of time tracking instead of executing, because I really need to be (this one’s for the IT people):

- a) Sorting Punch Cards
- b) Compiling,
- c) Debugging, etc...”

Team (2005): “What value does it bring, I will be done in much less time than it takes to fill-in your silly task sheet

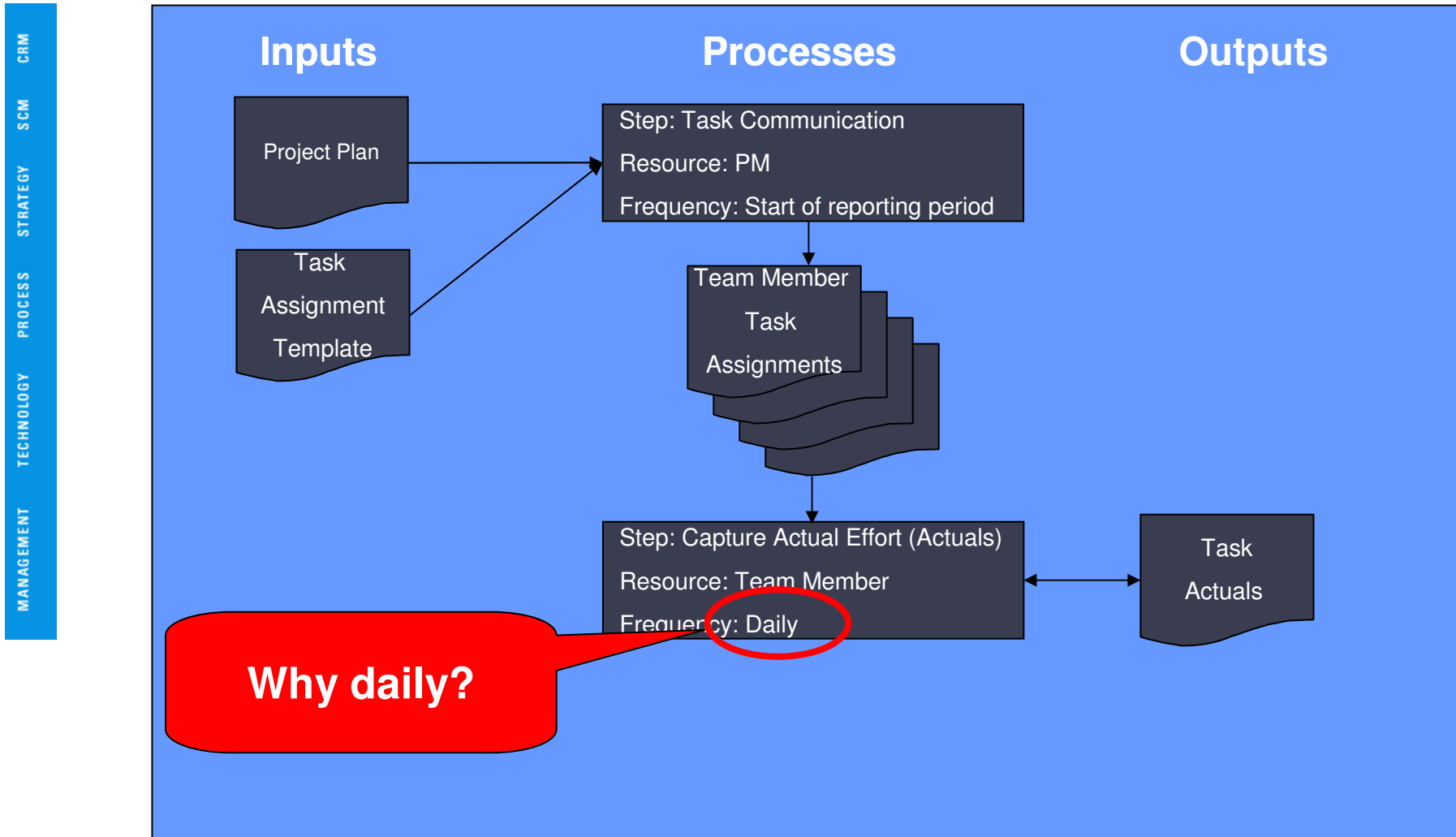


# Recipe For Success

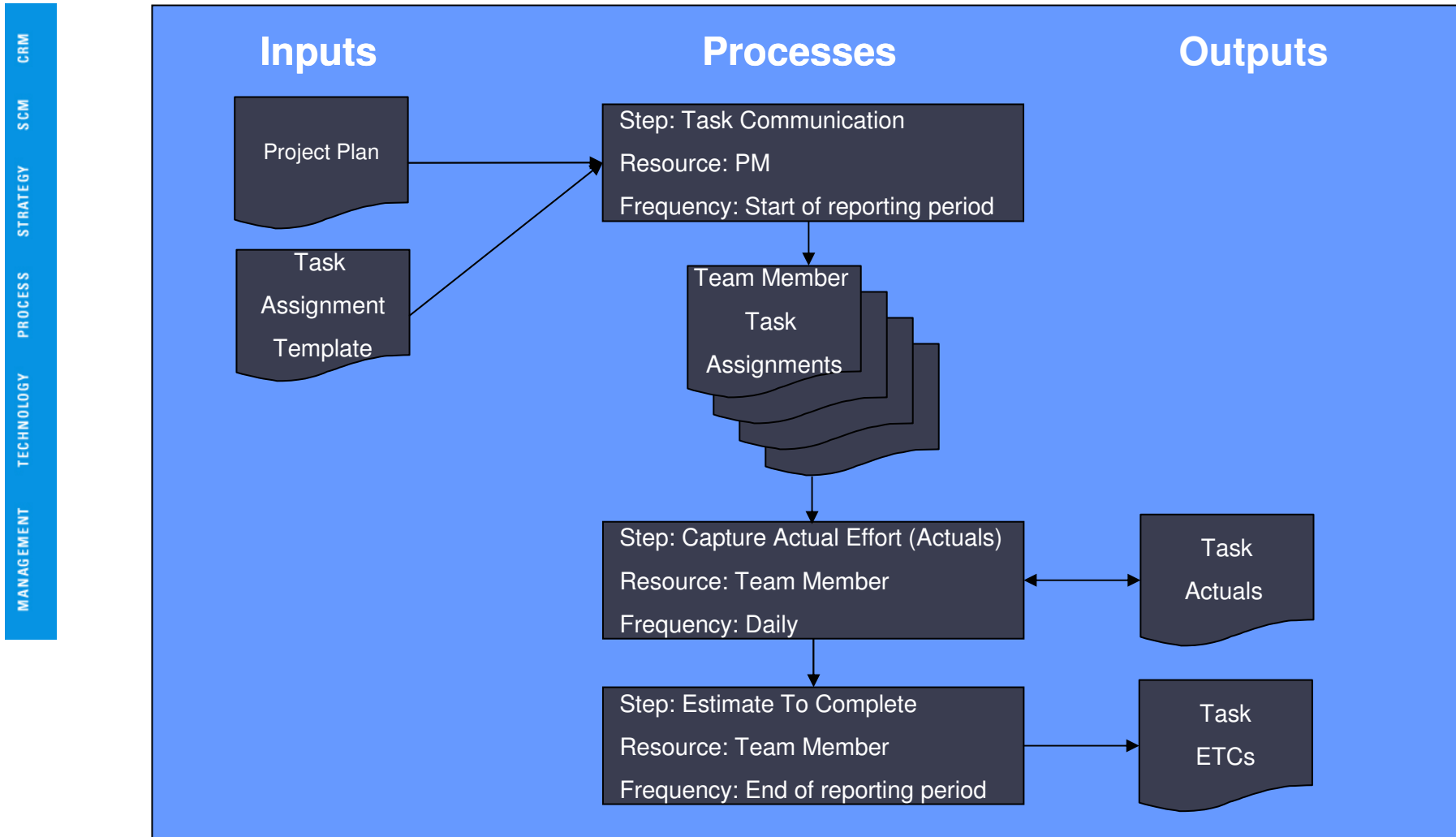
**1) Rightsize your plan**

**2) Get team buy-in**

# “Capture It or Loose It” – Task Tracking



# “Capture It or Loose It” – Task Tracking





# Recording Task Actuals

MANAGEMENT  
TECHNOLOGY  
PROCESS  
STRATEGY  
SCM  
CRM

Microsoft Excel - TAD.xls

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Formula bar: =SUM(D5,D10,D15,D20,D25,D30,D35,D40,D45,D50,D55,D60,D65,D70,D75,D80,D85,D90)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	ED Process SME			Week 1				Week 1		Week 2				We						
2				Actual Work				Actual	ETC	Actual Work				Actual						
3	Task	Baseline	Actual	Sun	Mon	Tue	Wed	Thur	Fri	Sat	Total		Sun	Mon	Tue	Wed	Thur	Fri	Sat	Total
4	Current State - ED	250	43	0	10	8	9	8	8	0	43	224	0	0	0	0	0	0	0	0
5	SP #1: Pre-arrival sub-process	6	10	0	10	0	0	0	0	0	10	0	0	0	0	0	0	0	0	0
6	Plan/Prep	1	2		2						2	0								0
7	Brainstorm	2	3		3						3	0								0
8	Consolidate	2	3		3						3	0								0
9	Document	1	2		2						2	0								0
10	SP #2: Pt arrival, initial assessment with sort sub-process	20	25	0	0	8	9	8	0	0	25	0	0	0	0	0	0	0	0	0
11	Plan/Prep	1	2		2						2	0								0
12	Brainstorm	9	12		6	6					12	0								0
13	Consolidate	9	8			3	5				8	0								0
14	Document	1	3				3				3	0								0
15	SP #3: Secondary assessment & treatment sub-process	20	8	0	0	0	0	0	8	0	8	8	0	0	0	0	0	0	0	0
16	Plan/Prep	1	1						1		1	0								0
17	Brainstorm	9	6						6		6	0								0
18	Consolidate	9	1						1		1	6								0
19	Document	1	0								0	2								0
20	SP #4: Physician Diagnostic Test Evaluation Sub-process (SP #4)	12	0	0	0	0	0	0	0	0	0	12	0	0	0	0	0	0	0	0
21	Plan/Prep	1	0								0	1								0



## Quiz

What is the “ideal” reporting period?

- a. When I feel like it
- b. Weekly
- c. Bi-weekly
- d. It depends**

“Right-size” your reporting period so that you incur the  
**MINIMUM**  
reporting overhead required to  
**SUCCESSFULLY**  
manage your plan

# Recipe For Success

- 1) Right-size your plan
- 2) Get team buy-in
- 3) Right-size your reporting periods

		27	28	29	30	45	Project Time										Weekly Project Total		
1																			
2																			
5	Sunday 4-Jun	2.00																	2.00
6	Monday 5-Jun	8.00																	8.00
7	Tuesday 6-Jun	2.00	6.00																8.00
8	Wednesday 7-Jun	1.00	3.00	6.00															10.00
9	Thursday 8-Jun			6.00	3.00														9.00
10	Friday 9-Jun			3.00	6.00	0.50													9.50
11	Saturday 10-Jun																		-
12	Task Total	13.00	9.00	15.00	9.00	0.50	-	-	-	-	-	-	-	-	-	-	-	-	46.50
14	Estimate to Complete	0.00	0.00	0.00	2.00	2.00													



# Last Look At Actuals Tracking (Forensics)

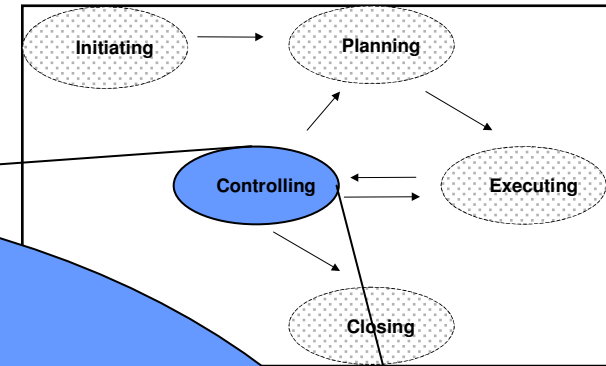
CRM  
SCM  
STRATEGY  
PROCESS  
TECHNOLOGY  
MANAGEMENT

ED Process SME			Week 1		Week 2		Week 3		Week 4		Week 5		Week 6		Week 7	
Task	Baseline	Actual	Actual Total	ETC	Actual Total	ETC	Actual Total	ETC	Actual Total	ETC	Actual Total	ETC	Actual Total	ETC	Actual Total	ETC
Current State - ED	250	260	43	224	46	182	42	138	42	110	45	69	42	27	0	216
SP #1: Pre-arrival sub-process	6	10	10	0	0	0	0	0	0	0	0	0	0	0	0	0
SP #2: Pt arrival, initial assessment with sort sub-process	20	25	25	0	0	0	0	0	0	0	0	0	0	0	0	0
SP #3: Secondary assessment & treatment sub-process	20	26	8	8	8	4	6	0	2	0	1	0	1	0	0	0
SP #4: Physician Diagnostic Evaluation Sub-process	12	15	0	12	7	5	4	1	2	1	1	0	1	0	0	12
SP #5: Patient treatment	12	15	0	12	7	5	4	1	2	1	1	0	1	0	0	12
SP #6: Patient Disposition	12	16	0	12	8	4	4	1	2	1	1	0	1	0	0	12
SP #7: Chart Completion Sub-Process	14	14	0	12	8	4	2	1	2	1	1	0	1	0	0	12
SP #8: Code Blue Sub-Process	20	20	0	20	8	12	2	10	4	5	4	1	2	0	0	20
SP #9: Psychiatric Disposition	0	20	0	20	8	12	4	4	4	3	1	1	1	0	0	20
SP #10: Flight Medicine Sub-Process	0	12	0	12	8	4	4	4	4	4	0	1	0	0	12	
SP #11: Patient follow-up after ED Discharge	8	12	0	12	4	4	8	1	1	1	1	1	0	0	12	
SP #12: System Downtime	8	11	0	8	0	8	6	2	4	0	1	0	0	0	8	
SP #13: Use of generic Physician in ED	12	11	0	12	0	12	6	6	4	2	1	0	0	0	12	
SP #14: Admissions Sub-Process	20	16	0	20	0	20	0	20	8	12	8	4	0	0	20	
SP #15: Medications Management Sub-Process	20	16	0	20	0	20	0	20	8	12	8	4	0	0	20	
SP #16: ED Pre-Code Purple Escalation Plan Sub-Process	12	12	0	12	0	12	0	12	4	8	8	1	0	0	12	
SP #17: Code Purple Sub-Process	12	6	0	20	0	20	0	20	0	20	6	6	0	0	20	
SP #18: Regulatory Audits & Compliance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

**What is happening when the "Open" task count increases?**



## The 4 Key Controlling Processes

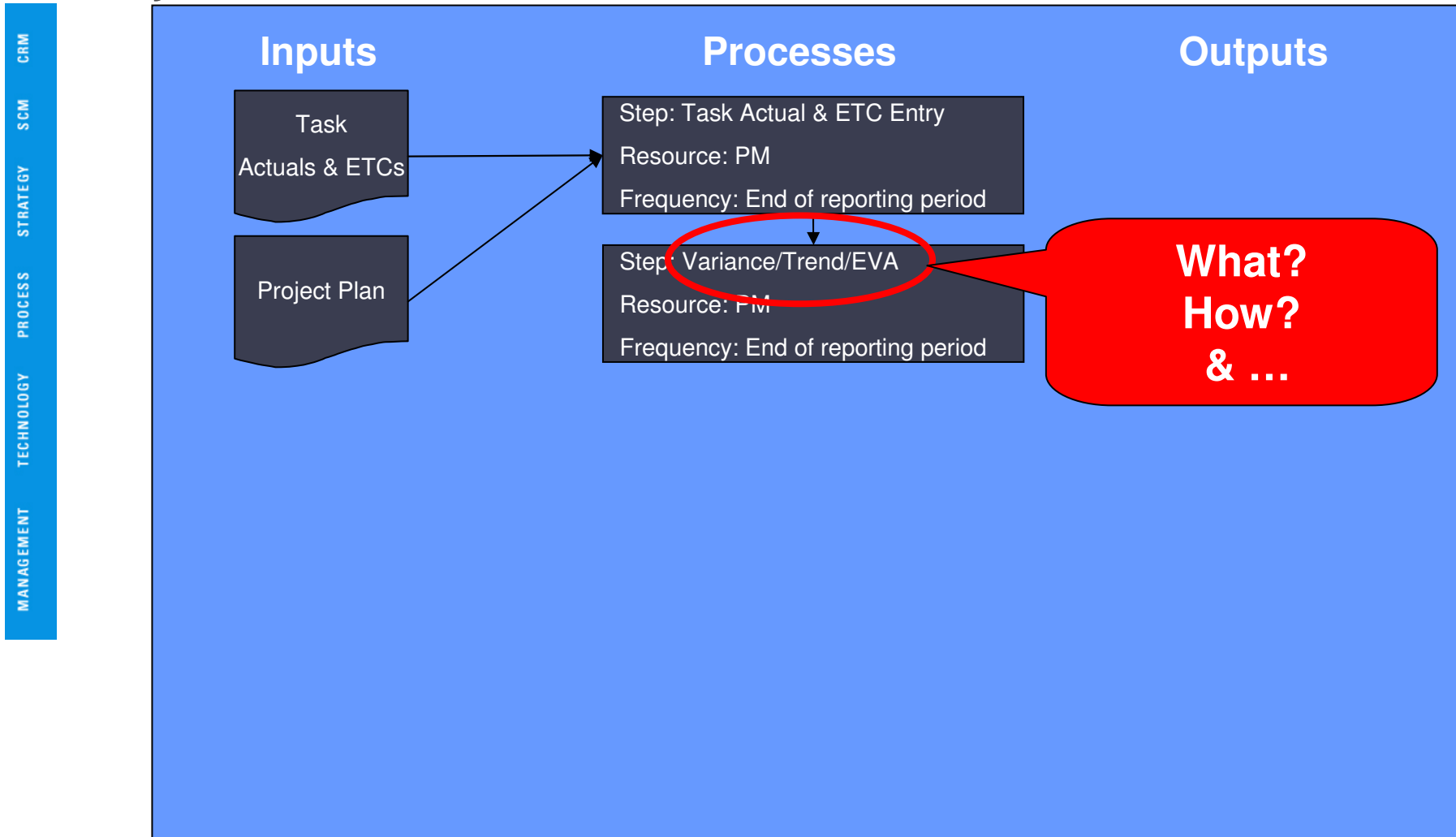


# Controlling

- Task Tracking
- Project Plan Maintenance
- Issue Tracking
- Status Reporting

# “Failure To Maintain Plan – Planning to Fail”

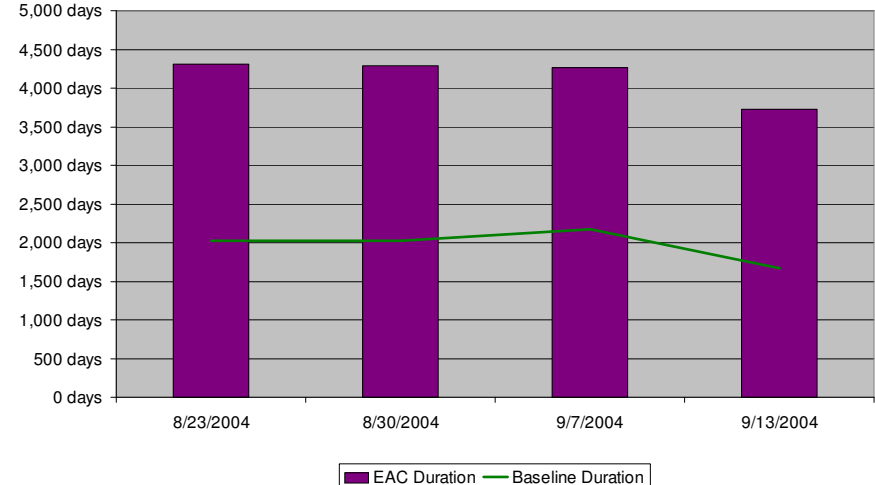
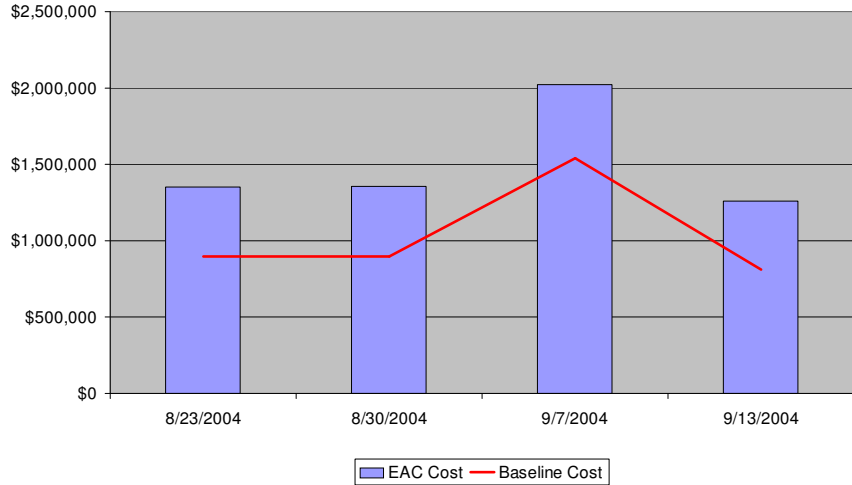
## Project Plan Maintenance



## Question: WHY should I perform variance/EVA calculation?

Answer: To allow you to leverage time to apply what you have learned during the project.

### Example:



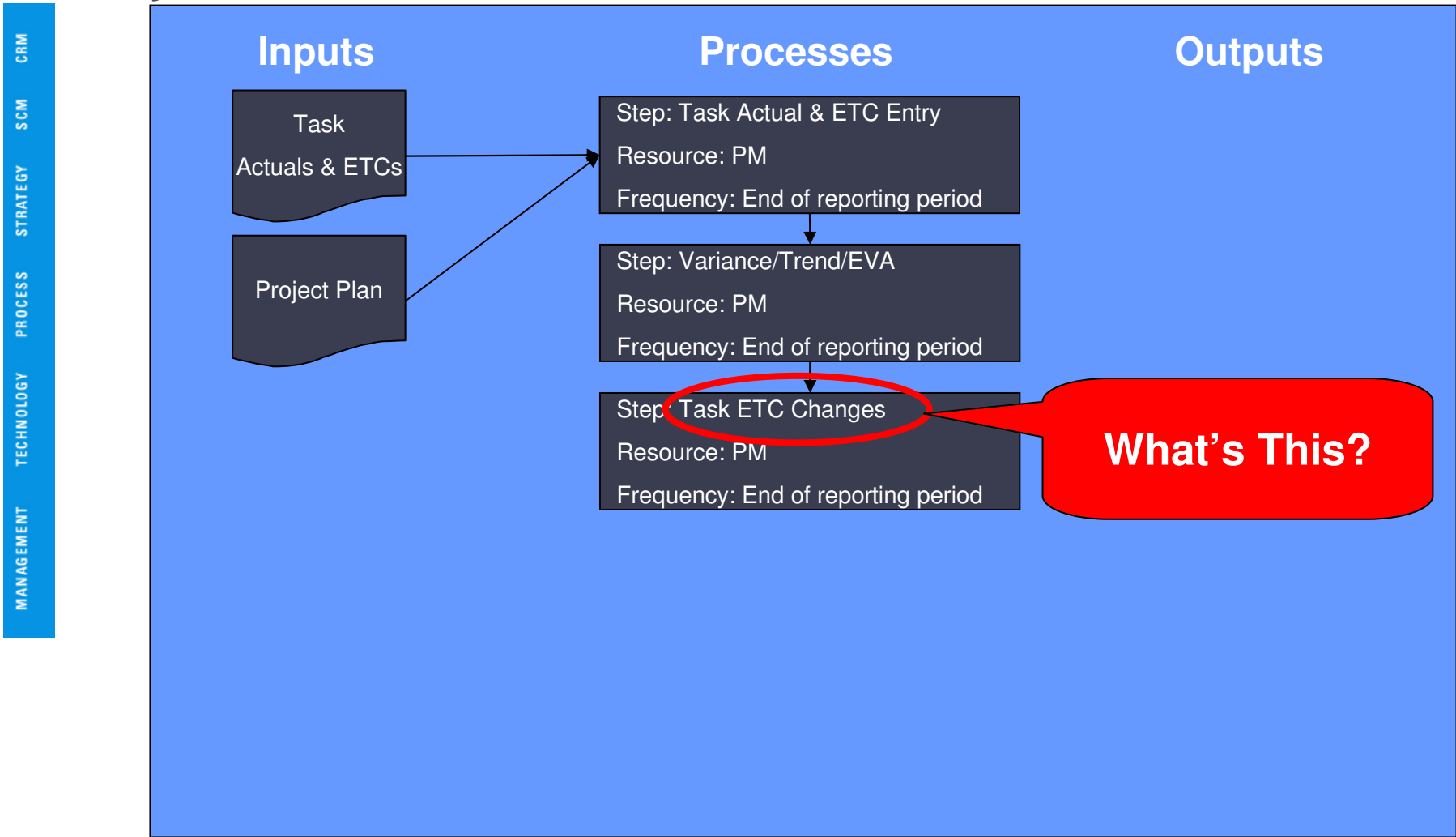
12 active projects will exceed the estimated cost by **55%** and duration by **123%**.

This translates into:

- budget overrun of **\$447K**
- cumulative delay of over **8 years**

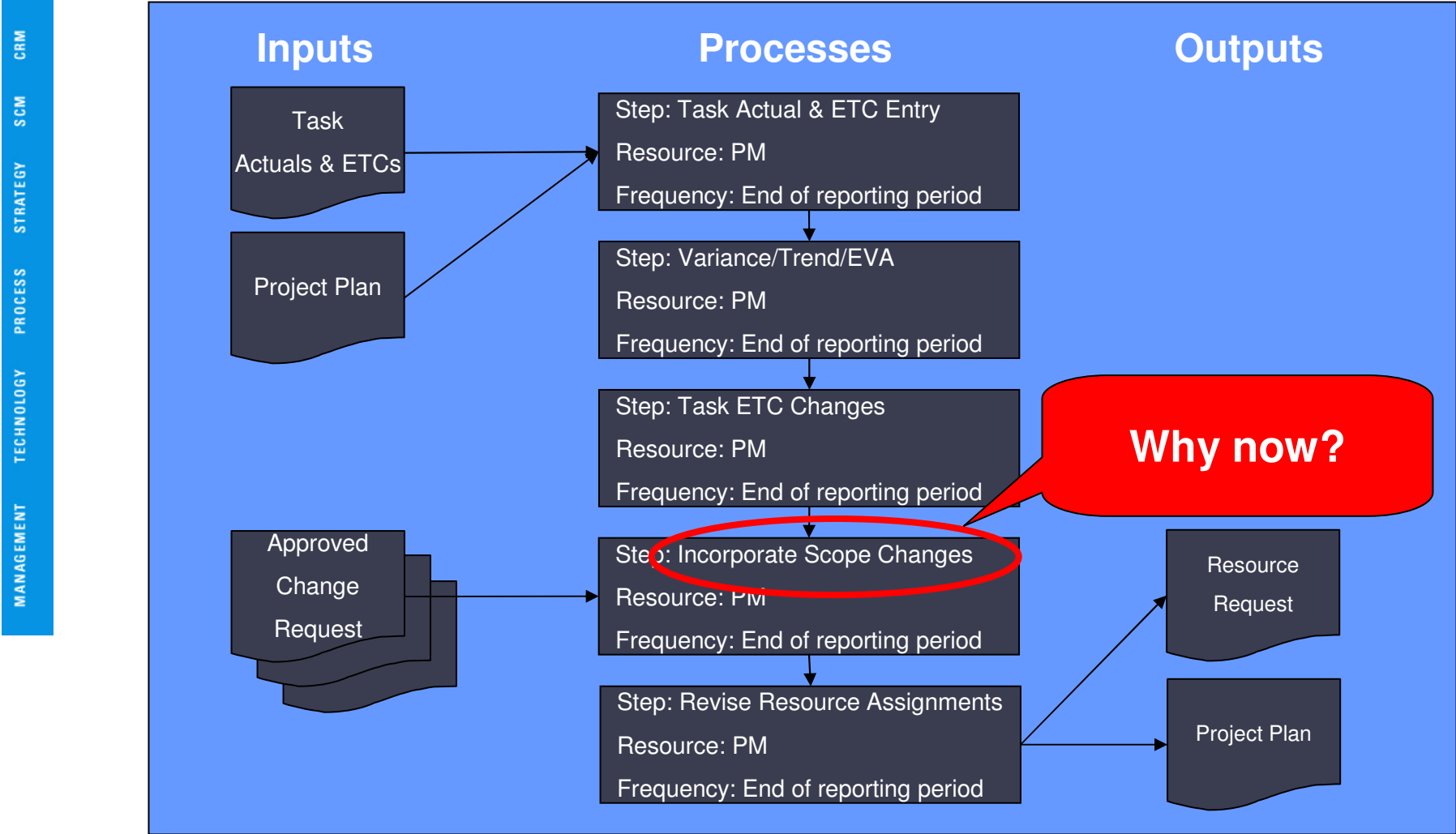


# “Failure To Maintain Plan – Planning to Fail” Project Plan Maintenance





# “Failure To Maintain Plan – Planning to Fail” Project Plan Maintenance

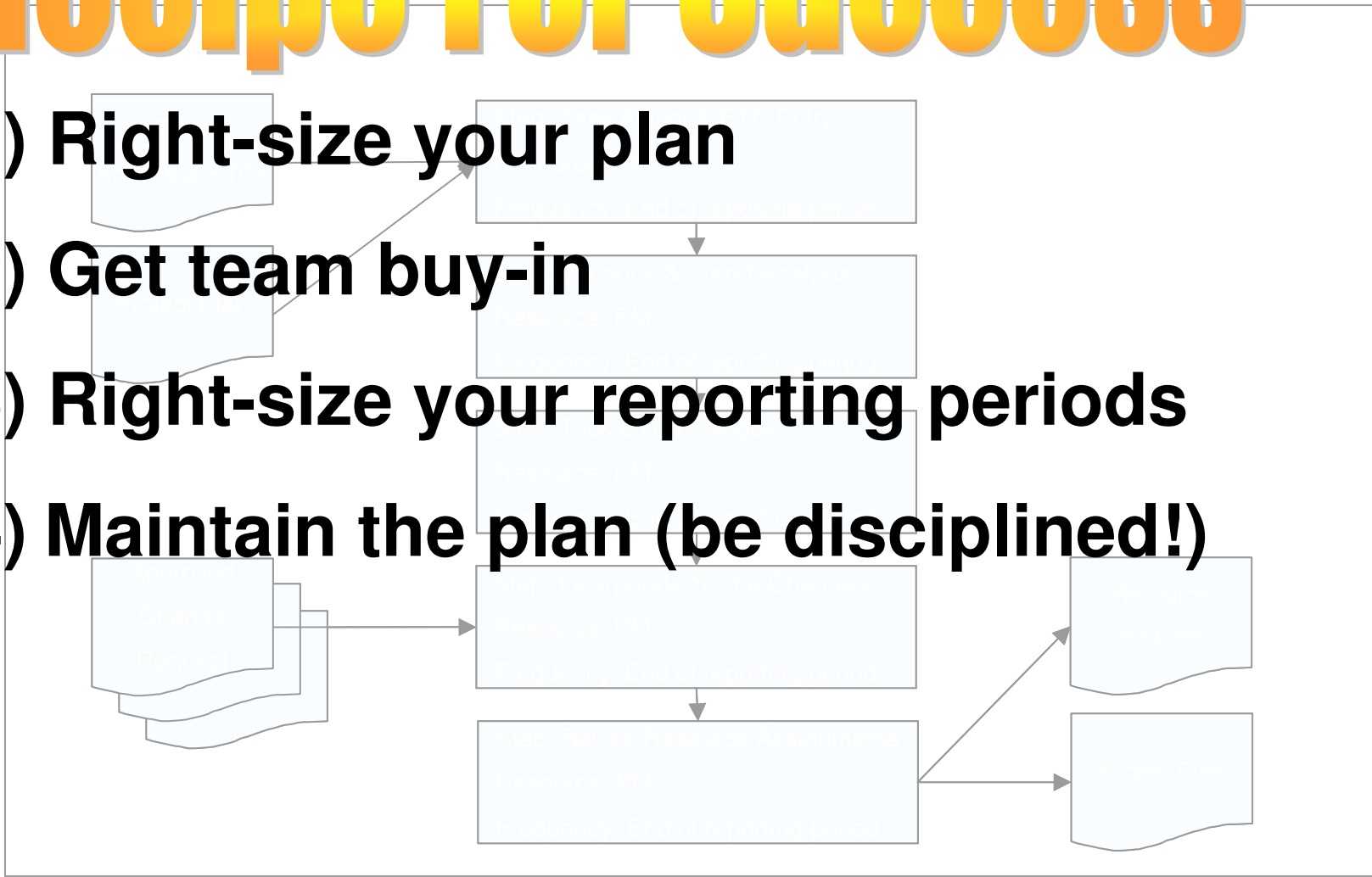




# Recipe For Success

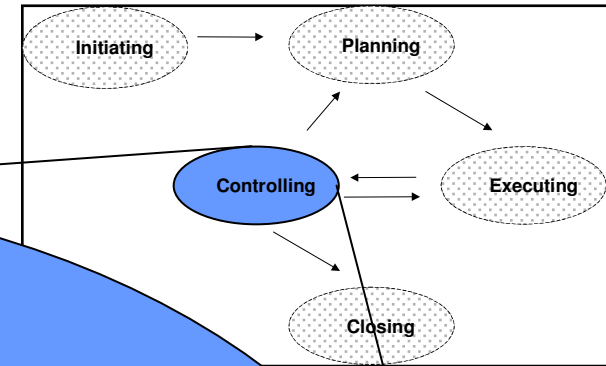
MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM

- 1) Right-size your plan
- 2) Get team buy-in
- 3) Right-size your reporting periods
- 4) Maintain the plan (be disciplined!)





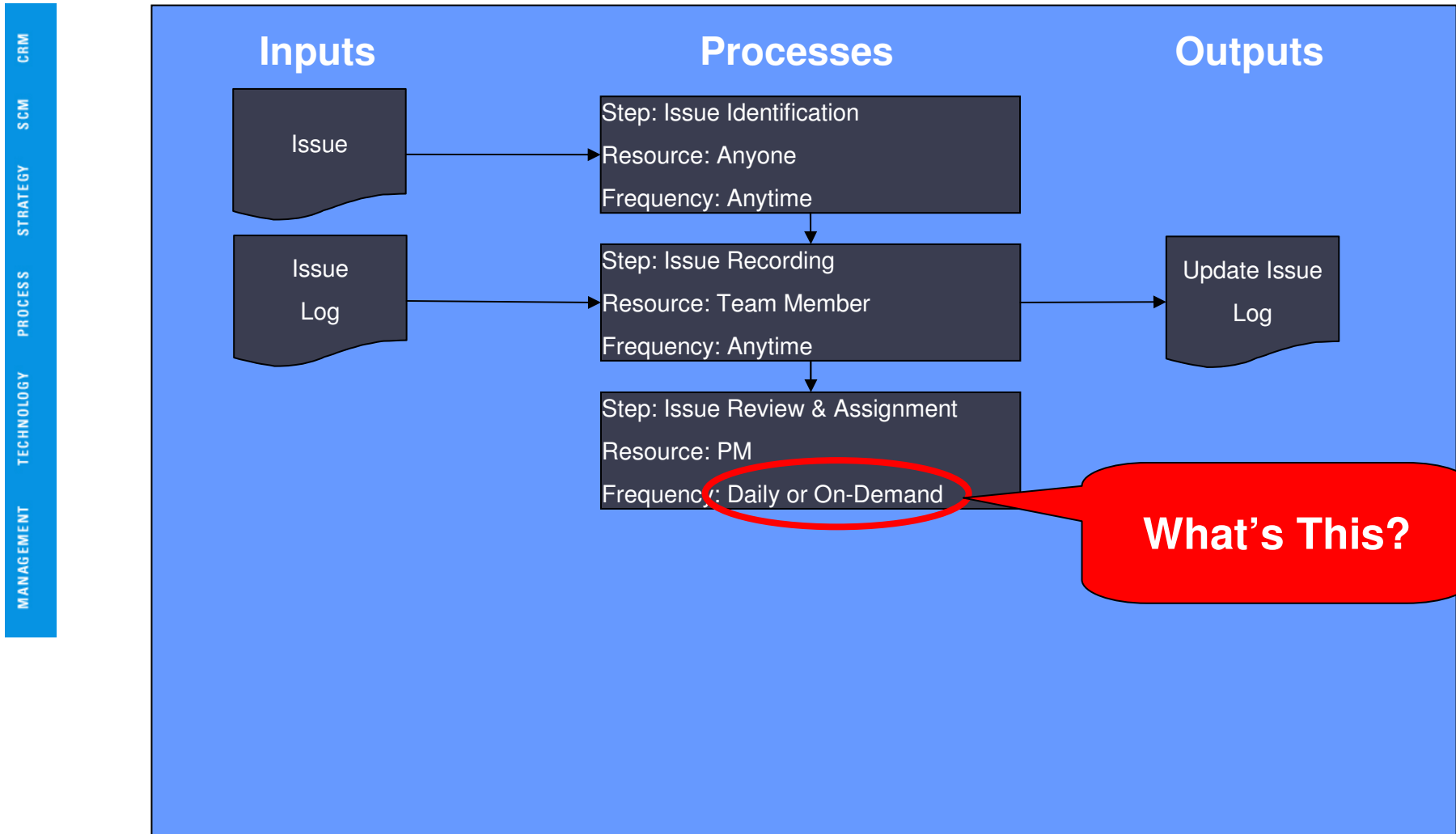
## The 4 Key Controlling Processes



# Controlling

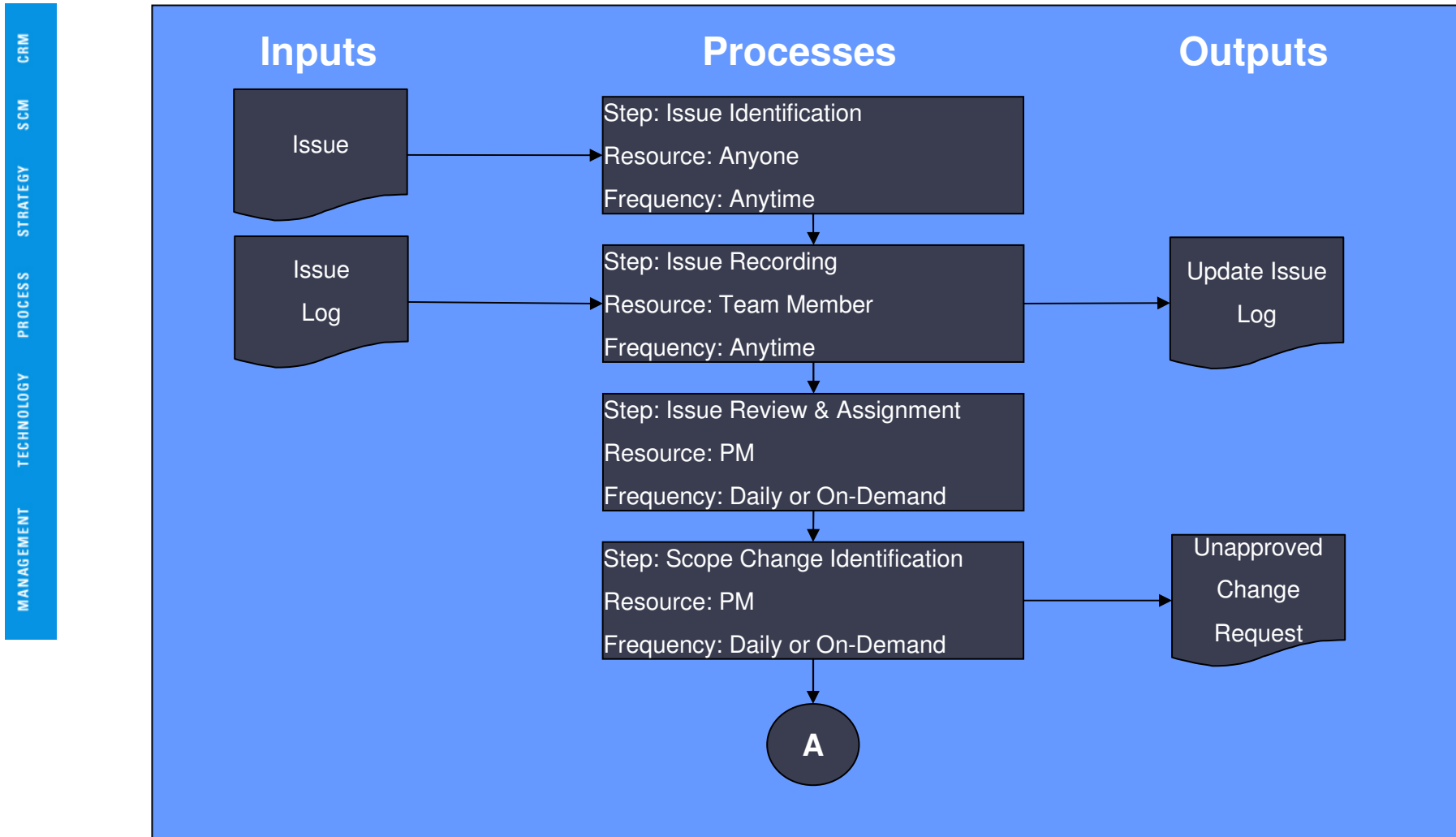
- Task Tracking
- Project Plan Maintenance
- Issue Tracking
- Status Reporting

# “See No Evil, Hear No Evil....” - Issue Tracking

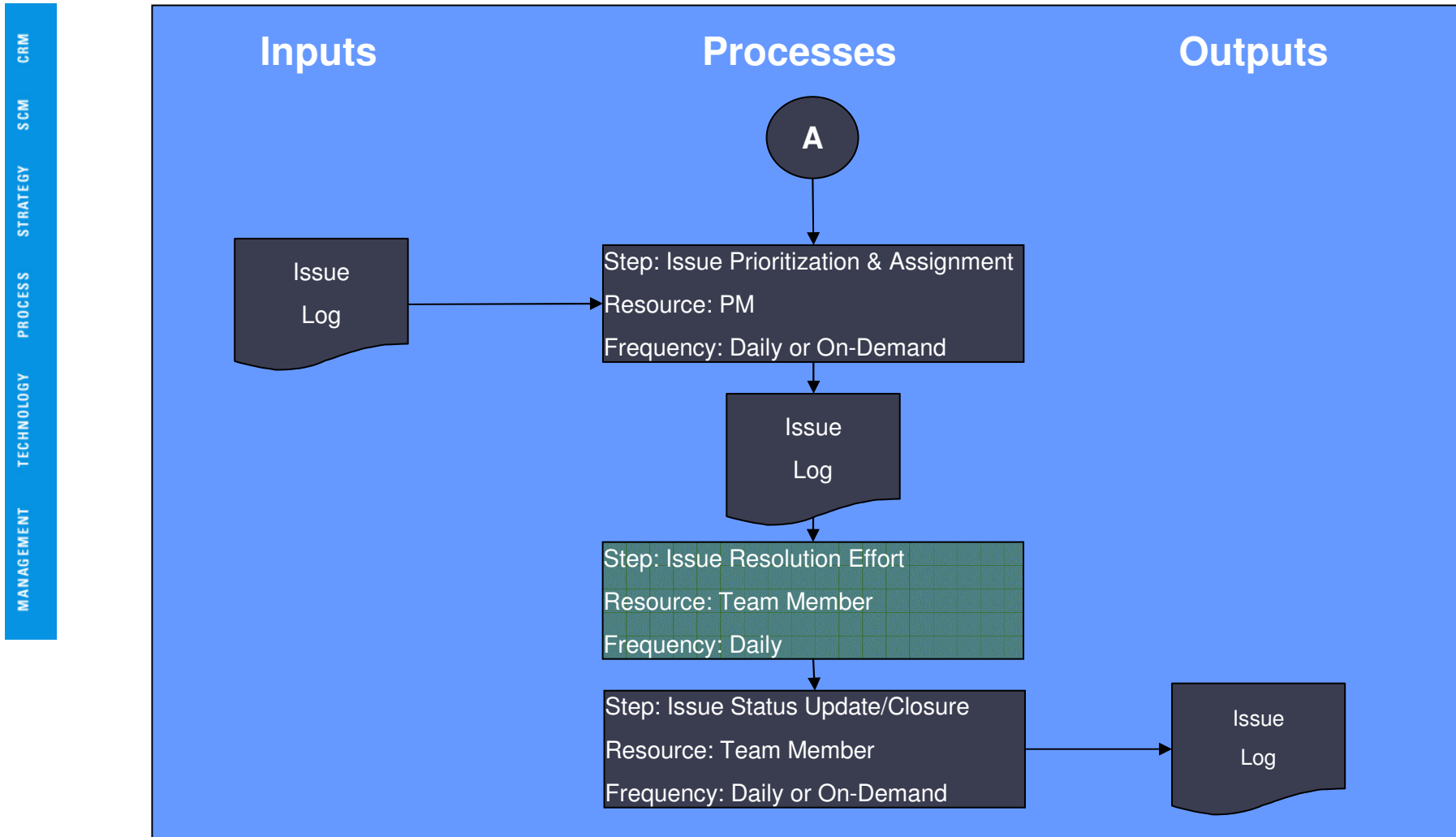


MANAGEMENT  
TECHNOLOGY  
PROCESS  
STRATEGY  
SCM  
CRM

# “See No Evil, Hear No Evil....” - Issue Tracking



# “See No Evil, Hear No Evil....” - Issue Tracking



# Issue Log

Issue Log							
<u>Open Issues</u>							
I.D.#	Date Reported	Priority	Owner	Issue	Est. Resolution Date	Next Steps	Status (Date, Status)
1.05	11/28/01	2 – Med	C. Gardner	Data definitions not included in Use Cases (such as (Peak Fired Hours))	2/4/02	Chris will facilitate reviewing the glossary for completeness with the team	01/31/02 – Awaiting definition for set profile. Anticipate completion for iteration 1 on 2/4/02. 01/23/02 – In-Process – C. Gardner is working with team members to get appropriate terms into the glossary. Also, will most likely add new terms after the new versions of UC01 and UC02 are complete. 01/15/02 – In-Process – Chris will facilitate reviewing the glossary for completeness with the team
1.06	11/28/01	1 – High	J. Kuncis	ES/PS Atlanta infrastructure has a new toll gate process for migration to the production environment that will affect our effort and schedule.	2/5/02	Confirm responsibility for application and architecture review w/Tarak & Justin	01/29/02 – In-Process – Production migration requirements are documented in the supplemental specification. Eric Jackson will be responsible for technical and security review. Tarak Modj or Justin Xue will need to take responsibility for Application and Architecture review components 01/28/02 – In-Process – meeting schedule w/Eric Jackson to discuss requirements on 1/29/02. HR team is developing reusable code for sign-on (Tarak is



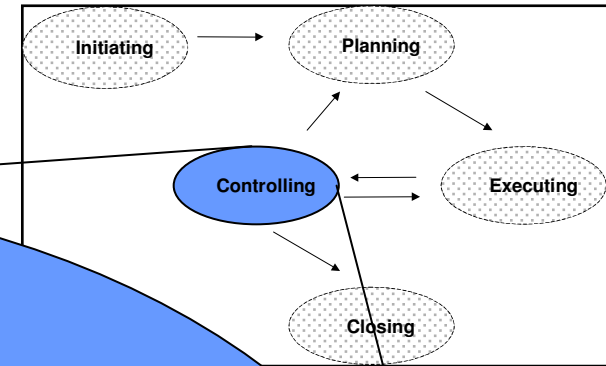
# Recipe For Success

MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM

- 1) Right-size your plan
- 2) Get team buy-in
- 3) Right-size your reporting periods
- 4) Maintain the plan (be disciplined!)
- 5) Work the issue log (be disciplined!)

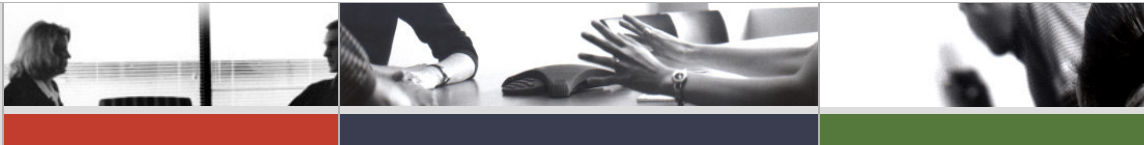


## The 4 Key Controlling Processes

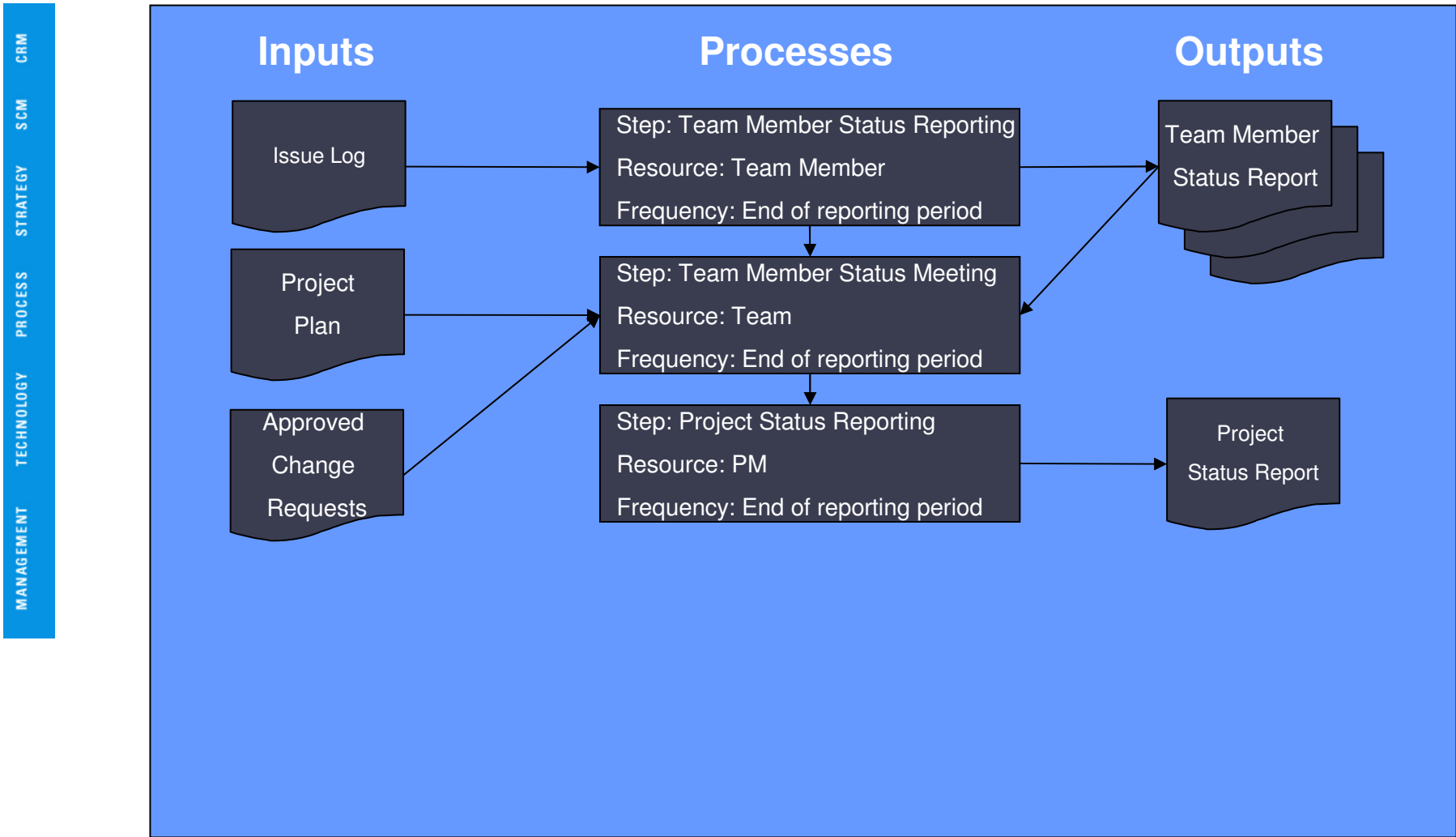


# Controlling

- Task Tracking
- Project Plan Maintenance
- Issue Tracking
- Status Reporting



# ...Speak No Evil - Status Reporting



# ...Speak No Evil - Status Reporting

MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM

Sample Status Report W5 2002-01-31.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

CMIM V1.1 Fortune 500 Company  
Week Starting: 1/31/2002 Submitted By: [Name] Business Unit: [Name]

Description	No.	Age	Explanation
Change Request	X		Change Request #18888 - [Details]
Change Request	X		Change Request #18889 - [Details]
Technical Problem	X		Technical Problem #18890 - [Details]
Project Problem	X		Project Problem #18891 - [Details]
Performance Problem	X		Performance Problem #18892 - [Details]

**Project Statistics**

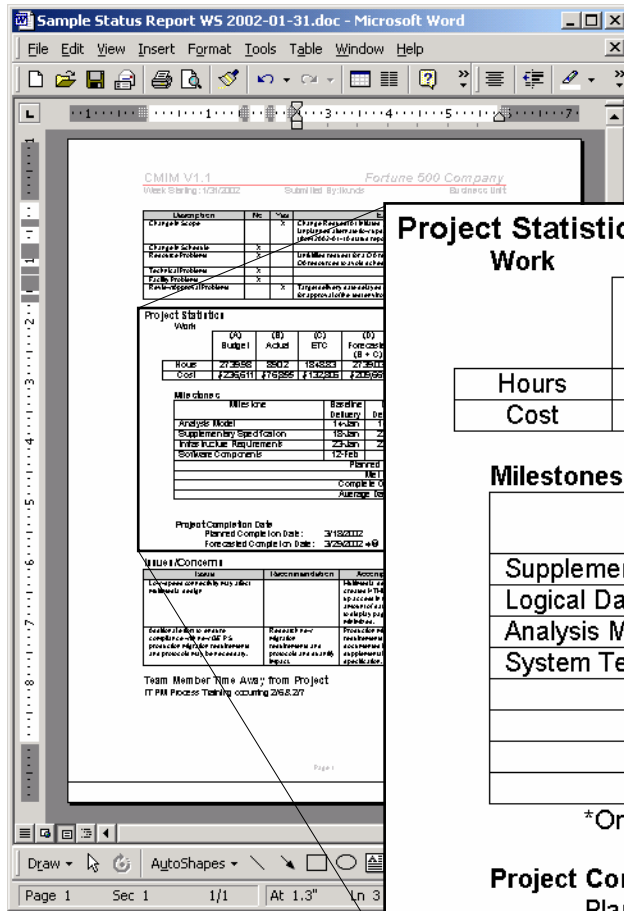
Week	CV	Budget	(B)	(C)	(D)	(E)	(F)	(G)
Month	2/1/2002	2/8/2002	2/15/2002	2/22/2002	2/29/2002	3/6/2002	3/13/2002	3/20/2002
Cost	2250000	2750000	1250000	2250000	2250000	2250000	2250000	2250000

**Issues/Concerns**

Issue	Recommendation	Accomplished	Status	Owner
Low-speed connectivity may affect multimedia design		Multimedia designer created HTML with dial-up access in mind. The amount of data required to display pages will be minimized.	Complete	Heera Sharma
We have not received all the field validations (Issue 1.17) for UC01 and UC02.	Since the validations are unavailable, we will need to have a change request for adding any validations required.	Meeting set to discuss validation on 02/08	In-Process	Jeff Valenti
No Unit Testing Time	Additional time is needed for Unit Testing the developed module for Use Case 01 & 02.	Project plan updated to reflect additional unit testing time. Heera will provide detail unit test effort estimates.	New	Heera Sharma
Length of contract and contract price will not be available from PDB v.33		Open up these fields for manual entry on the user interface.	New	Robert Berg

# ...Speak No Evil - Status Reporting

MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM



## Project Statistics Work

	(A) Budget	(B) Actual	(C) ETC	(D) Forecasted (B + C)	(E) Variance (D - A)	Variance (%)
Hours	2739.98	890.2	1848.83	2739.03	-0.95	-0.03%
Cost	\$236,611	\$76,855	\$132,806	\$209,661	(\$26,950.00)	(11.39%)

## Milestones

Milestone	Baseline Delivery	Date Delivered	Days Late
Supplementary Specification	19-Dec	23-Jan	10
Logical Data Model	10-Jan	16-Jan	4
Analysis Model	14-Jan	14-Jan	0
System Test Cases	31-Jan		
Planned to Date			4
Met to Date			1
Complete On Time			25%
Average Days Late			3.6*

\*Only calculated on completed deliverables

## Project Completion Date

Planned Completion Date: 3/18/2002  
 Forecasted Completion Date: 3/29/2002



## Sidebar - Measurements

**Symptom: Team continually exceeds budget and misses deadlines**

**Cause:**

- 1) Bad team - Later Projects**
- 2) Bad estimates - Earlier Project**

# ...Speak No Evil - Status Reporting

MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM

Sample Status Report W5 2002-01-31.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help

CMIM V1.1 Fortune 500 Company  
West Starling, VA 20132 Submitted By: [Name] Business Unit

Description	No	Yes	Explanation
Change in Scope		X	Change Request 01 initiated this week. Unplanned alternate flow updates were required on UC01 & UC02 (from 2002-01-10 status report)
Change in Schedule	X		
Resource Problems		X	Unfulfilled request for a QA resource now requires assignment of 2 QA resources to avoid schedule impact (from 2002-01-24).
Technical Problems	X		
Facility Problems	X		
Review/Approval Problems		X	Target delivery date delayed due to external resource dependencies for approval of the test environment (from 2002-01-17 status report)

Project Statistics

Item	Q4	Budget	(B)	(C)	(D)	(E)	(F)	(G)
Revenue	21,250,000	28,000,000	18,400,000	21,250,000	-4,750,000	-4,750,000		
Cost	2,250,000	2,750,000	2,125,000	2,250,000	-625,000	-625,000		

Milestones

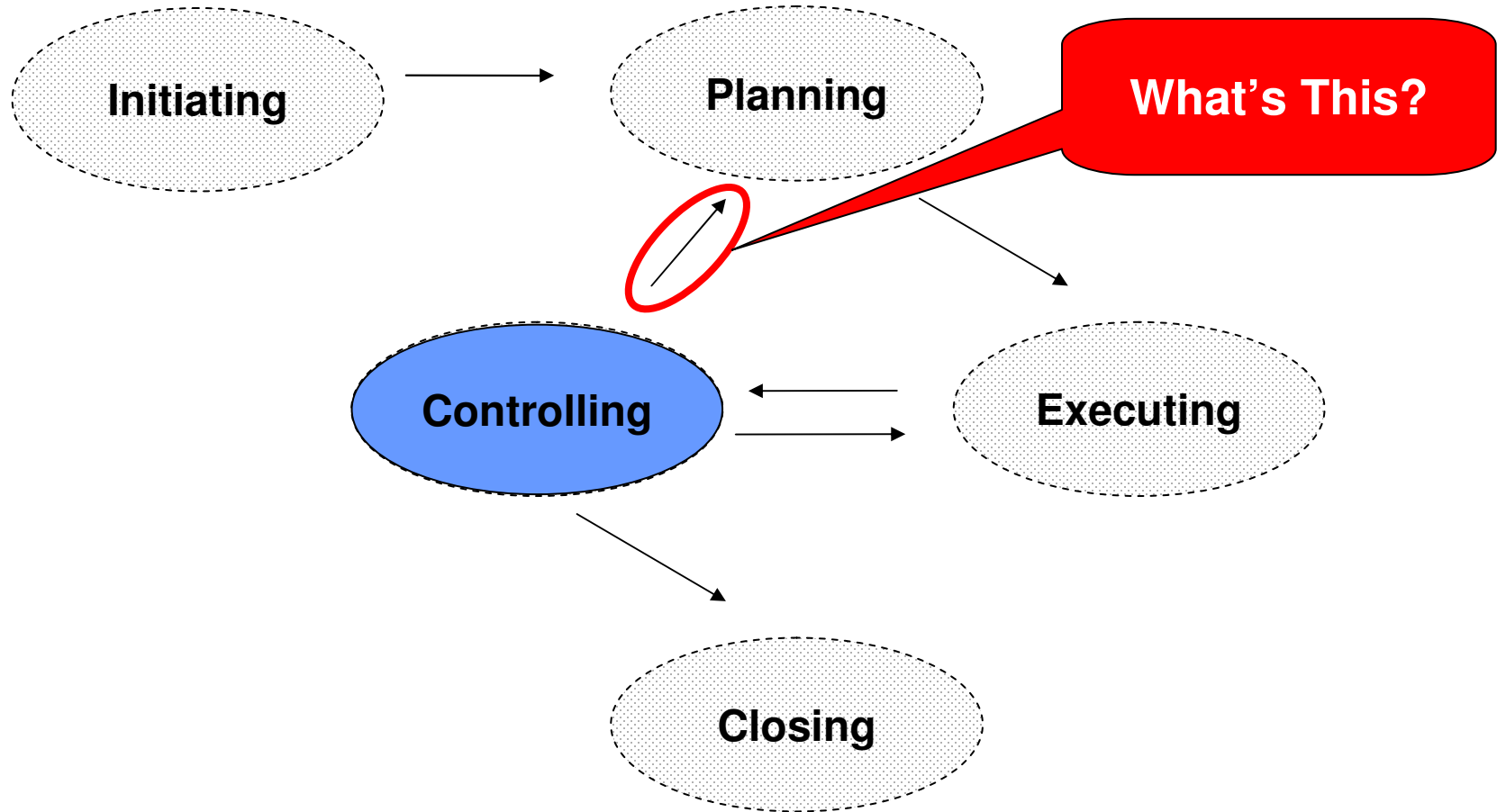
Milestone	Actual	Planned	Start	End	Open
Analysis Model			16-Jan	16-Jan	0
Supplier/Requirement			18-Jan	25-Jan	2
Final Review/Requirements			25-Jan	25-Jan	0
Software Complete			12-Feb	12-Feb	1

Description	No	Yes	Explanation
Change in Scope		X	Change Request 01 initiated this week. Unplanned alternate flow updates were required on UC01 & UC02 (from 2002-01-10 status report)
Change in Schedule	X		
Resource Problems		X	Unfulfilled request for a QA resource now requires assignment of 2 QA resources to avoid schedule impact (from 2002-01-24).
Technical Problems	X		
Facility Problems	X		
Review/Approval Problems		X	Target delivery date delayed due to external resource dependencies for approval of the test environment (from 2002-01-17 status report)



# PMBOK: Learn from experience

MANAGEMENT  
TECHNOLOGY  
PROCESS  
STRATEGY  
SCM  
CRM





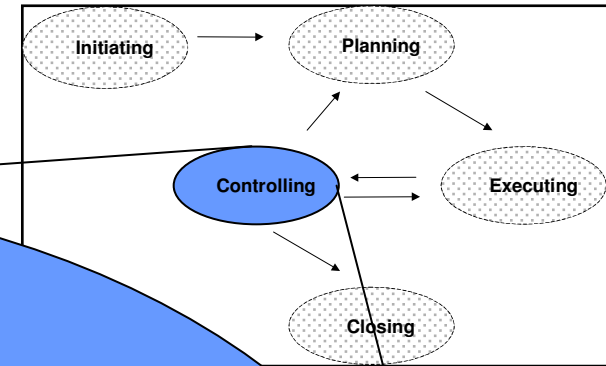
# Recipe For Success

MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM

- 1) Right-size your plan
- 2) Get team buy-in
- 3) Right-size your reporting periods
- 4) Maintain the plan (be disciplined!)
- 5) Work the issue log (be disciplined!)
- 6) Learn from experience



...Speak No Evil - Status Reporting



# Controlling

- Task Tracking
- Project Plan Maintenance
- Issue Tracking
- Status Reporting



Sidebar – What technology should I use?

**FOCUS ON PROCESS!**

**Technology can actually impede success!**



Get started TOMORROW! Here's the recipe:

- 1) Right-size your plan**
- 2) Get team buy-in**
- 3) Right-size your reporting periods**
- 4) Maintain the plan (be disciplined!)**
- 5) Work the issue log (be disciplined!)**
- 6) Learn from experience**

## At The End Of The Next Reporting Period

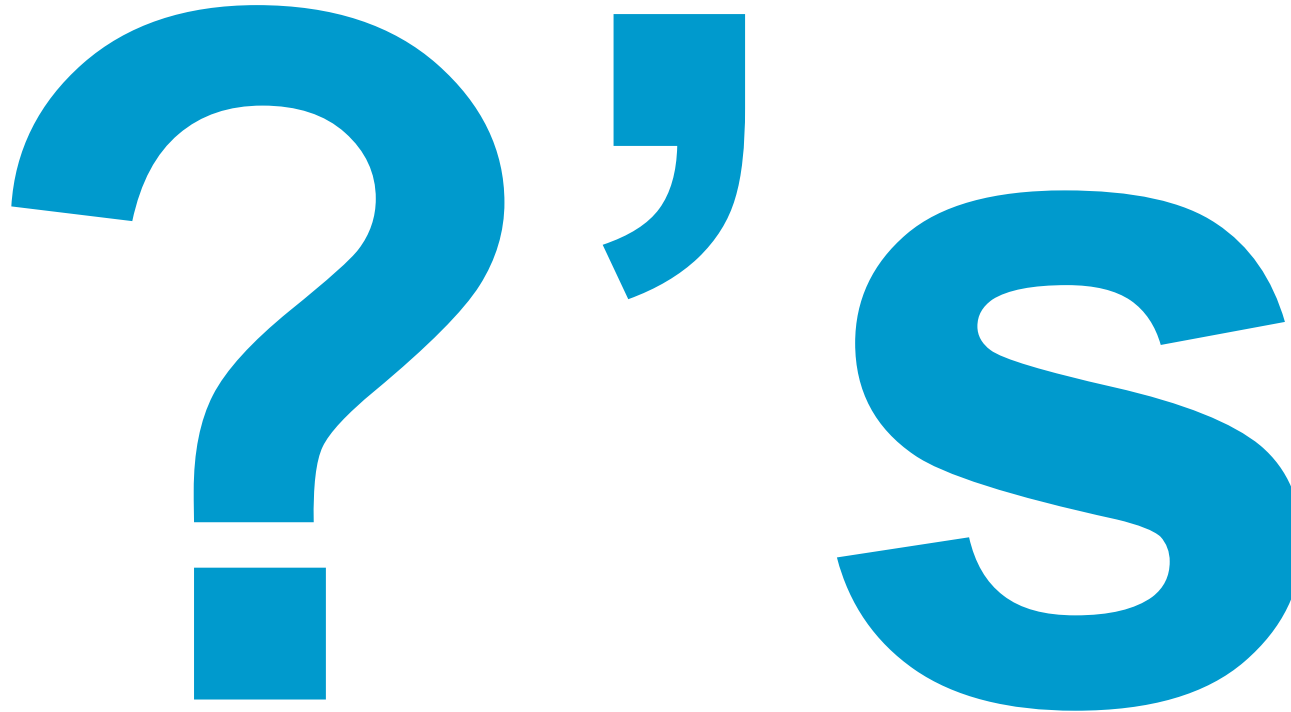
Collect Actuals, ETC's, and team member status reports from team

- Update, review, and revise project plan:
  - Enter Actuals and ETC's into project tracking tool
  - Perform variance analysis
  - Perform trend analysis
  - Revise remaining tasks (as necessary)
  - Revise staffing (as necessary)
- Prepare consolidated project status report
- Review and update status report based on project team feedback
- Execute project status meeting
- Distribute and file status report
- Communicate task assignments for next reporting period



# Questions

MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM



Contact [JKuncis@NorthHighland.com](mailto:JKuncis@NorthHighland.com)

With Further Questions



Thank You

MANAGEMENT TECHNOLOGY PROCESS STRATEGY SCM CRM

**Thank You!**