

PROJECT MANAGEMENT PRACTICES AT XYZ

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ABSTRACT

Project has definite start and end. Project management is a very challenging profession and demands lot of responsibility. This paper describes project life cycle and various project management processes followed at XYZ to manage and track projects. It is very important to follow processes which will not only help project manager but also to management to monitor project progress and take necessary steps in project execution. Schedule, budget and time are very important measures in project management on which project managers are rewarded.

Project lifecycle consists of four phases, initiation, planning, execution and control. Every phase consists of various important activities, project manager is responsible for engaging stakeholders in project and handle communication with all concerned parties. Project manager is responsible for interviewing team members to be selected for the project and make sure they have sufficient skills and knowledge for successful operation. Project manager needs to motivate team members and always look for opportunity to increase team moral. Project manager needs to provide friendly environment with team for improved productivity and timely resolution of issues. Project manager needs to consistently keep watch on potential risks arising during execution of project.

Project management processes used at XYZ using software tools like Quickbase is very helpful for all concerned members of the project to understand project scope, issues, risks, time, budget, project status. Project is monitored using controls like overdue tasks, overdue budget, overdue milestones, overdue timecard, overdue project status reports based on that Quickbase will allow or lock projects and project manager is expected to furnish all required details to unlock project. Such matrix are very useful in monitoring and making sure project is executed successfully. Customer satisfaction is very important criteria in project management. Successful project execution results into satisfied customers helps in bringing more business for company.

Overall, project management practice at XYZ is very effective.

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INTRODUCTION

XYZ is a product development company in a business of customizing and implementing solutions to various businesses across the globe. Each individual product is very powerful and customizable to fulfill needs from various industries.

Every new customer when signs up for one or multiple products developed by XYZ, there is always a need for customization and implementation. Project manager (PM) role at XYZ is very dynamic in nature and highly responsible for development, testing, deployment of product and customization work. At XYZ project managers are hired only when they are certified by Project Management Institute (PMI). PM is a link between customers, team, management, any third party vendors etc. PM is responsible to manage schedule, budget, time, communication, team members, risks and issues for the project. There are various activities associated with this role and successful execution of the duties results into highest customer satisfaction and generates more business for the company. But at the same time any failure results into dissatisfaction and loss of business. As PM position is very critical in nature, person hired for this position needs to be very skilled and experienced in handling projects.

As part of this project work, I will be detailing the practices we follow at XYZ to plan, define, execute and close projects. At XYZ we use Quickbase (QB) software which facilitates project managers to manage activities and track project progress. QB is very helpful to PMs and higher management to generate various reports on resource utilization, variance, project parameters etc.

PROJECT MANAGEMENT LIFE CYCLE

Project has a definite start and end. Project has life cycle which contains various stages Initiation, Planning, Execution and Closure. Every individual phase of project is very important and they either run in sequence or overlap with each other sometime. It is important that stakeholders actively participate in each individual phase for project success. Project manager is solely responsible to make sure every phase is executed successfully and stakeholders are actively participating. Refer to figure 1.0 for project management life cycle.



Figure 1. Project Management Life Cycle

XYZ has various internal departments to manage and develop base product. Product team is responsible for development of new features in base product. Customer implementation team works with customers in understanding and implementing customization. Architecture team is responsible to implement best architecture required for the product, upgrade framework for the product and analyze impact of the new features implementation. Infrastructure team is responsible for maintaining hosting environment, network and printers for employees. HR, Accounts and Administration departments are service departments for company operation.

PROJECT INITIATION

Sales team conducts product demo to customers and approaches customers with sales meetings. Based on customer needs Return On Investment (ROI) documents are prepared and benefits are explained to customers. Few customers even ask for Proof of concept (POC) to build confidence.

Project team comprises of project manager (PM) and business analyst (BA) visits potential customer and conduct high level requirements discussion. Based on the customers need high level features are listed and plugged into statement of work (SOW). Refer figure 2 for meeting agenda for assessment discussion.

Agenda for Warranty Assessment	
Day 1	
8:00 – 8:15	Introductions
8:15 – 10:00	Background, organization, stakeholders Organizations and scope Products, components, parts, and pricing Product registrations and configurations
10:00 – 10:15	Break
10:15 – 12:00	Labor hours, rates, and operations Warranty coverages and campaigns Catalogs
12:00 – 1:00	Lunch break
1:00 – 3:00	Claim entry, approval and workflow
3:00 – 3:15	Break

Figure 2. Meeting Agenda for Assessment

PM and BA prepare scoping document and assessment notes during meeting. Features available in assessment notes are then needs to be estimated using standard estimation model. Once PM arrives at estimation of required features, he prepares SOW by plugging in all the required information from scoping document and defines terms and condition of SOW and gets it reviewed by higher management. Sales team actively participates in finalizing SOW with PM to define cost, schedule, terms and condition of the project. SOW is then sent to customers.

PROJECT PLANNING

Once customer agrees with SOW terms, kickoff meeting takes place at customer site. During kickoff meeting project stakeholders are identified and product demo is arranged. High level features are discussed and project execution processes are discussed. Project manager then creates detailed project plan. Refer figure 2 for sample project plan with gantt chart view.

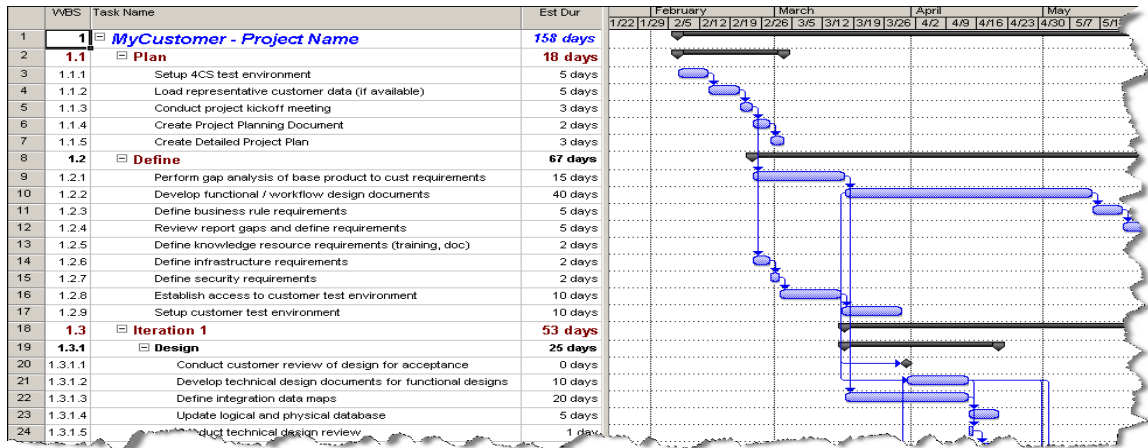


Figure 3. Sample Project Plan with Gantt Chart View

Critical path is identified and reviewed with customers, which helps in defining project time line. Project activities in project plan are divided into multiple phases and multiple iterations within each phase. Milestones are defined at the completion of iteration to track project progress. Project plan is then shared with customers and milestone dates are reviewed. PM then prepares resource requirement plan and submits requests in QB to resource managers (RM). Hardware and software requests are placed in QB for test environment setup.

RMs identifies resources and assigns them to the project in QB. Project manager requests resource history profile from HR and conducts resource interview to make sure right resources are assigned. Budget is allocated to the project based on the agreed effort estimates in SOW. PM then creates contact list of identified stakeholders and team members and shares it with customers. Refer to figure 4 for sample contact list document.

MyCustomer Project Name Project Contacts					
Name	Project Role	Office Phone	Mobile Phone	Email 1	Email 2
MyCustomer					
	Project Sponsor	xxx.xxx.xxxx	xxx.xxx.xxxx		
	Project Manager				
	Business Function Manager				
	Application Manager				
Team					
	Project Manager	xxx.xxx.xxxx	xxx.xxx.xxxx		
	Business Analyst				
	Technical Lead				

Figure 4. Sample Project Contact List Document

PM creates tasks in QB for requirements gathering and technical environment setup. PM prepares project overview presentation and provides overview of project requirements and expectations to the team members. PM conducts meeting with architecture and infrastructure team to discuss which base product version to use and hardware and software required for the project. PM identifies risks for the project and creates risk management document and shares risks with customers. Refer to figure 5 for risk management log.

MyCustomer Project Risk Management Log												
ID	Risk Description	Identified		Date		Status	Prob %	Prob Class	Impact of Risk	Priority	Mitigation Plan	Contingency Plan
		By	Owner	Opened								
1	This is a sample risk that impacts the project	J. Doe	A. Smith	01/01/06		Identified	1%	Low	Impact to schedule	1	Description of mitigation plan goes here	Description of contingency plan goes here
2												
3												
4												
5												
6												
7												
8												
9												

Figure 5. Risk Management Log

During the course of the project there will be issues occurring and actions required. PM needs to track issues using issue management process for which he will shares issue management document with customers.

PROJECT EXECUTION

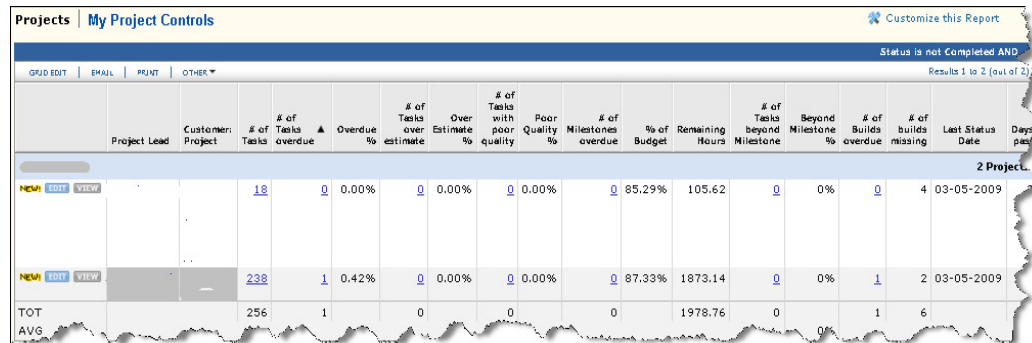
BA will be involved in preparing gapping document to identify new features customers are expecting and they are not available in SOW. Once Gap document is prepared, PM reviews it with customers and any additional requirements identified during gap analysis are handled using change management. Once gap document is finalized, BA will start preparing functional design document for features which needs to be modified in product or needs to be added new in the product. PM assigns tasks to business analyst for preparing functional design documents for each feature and conducts meeting with customers and team for requirements definition and review. PM needs to prepare weekly status report for the project and submit in QB which is visible to higher management for tracking project progress. PM will also conduct weekly status meeting with customers and shares status report and reviews project progress, issues, risks, upcoming milestone etc. Refer to figure 6 for project status report document.

MyCustomer Project STATUS As of 01/01/2009	
I	
Accomplishments and Deliverables	
- Text	
Upcoming Events and Milestones	
- Text	
Issues, Opportunities, and Actions	
- Text	
Plans for Next Week	
- Text	

Figure 6. Project Weekly Status Report

PM works with technical lead and team members to know if there are any issues in executing tasks. PM monitors the budget for the project and conducts meeting with team members to inform budget constraints (if any). PM attends biweekly management review meeting with higher management where project status report, issues, risks, budget, upcoming milestones, overdue tasks, effort variance, schedule variance and defects are reviewed and discussed. Project

manager is responsible to provide explanation for any failure in any of the project matrix. There are project controls implied in QB which alerts project manager for overdue tasks, overdue milestone, budget status, overdue status report etc.. Refer to figure 7 for QB project control parameters.



Project Lead	Customer/Project	# of Tasks	# of Tasks overdue	Overdue %	# of Tasks over estimate	Over Estimate %	# of Tasks with poor quality	Poor Quality %	# of Milestones overdue	% of Budget	Remaining Hours	# of Tasks beyond Milestone	Beyond Milestone %	# of Builds over/missing	Last Status Date	Days past
		18	0	0.00%	0	0.00%	0	0.00%	0	85.29%	105.62	0	0%	0	4	03-05-2009
		238	1	0.42%	0	0.00%	0	0.00%	0	87.33%	1873.14	0	0%	1	2	03-05-2009
TOT		256	1		0		0		0		1978.76	0	0%	1	6	
AVG																

Figure 7. QB project control parameters view

If any of the project parameter is greater than zero, QB will send out an email to PM and changes project status to yellow. If any of the parameter is over the decided threshold, then project status is automatically changed to red and will not allow any employee to enter timesheet and will force PM to take corrective action on the project.

Tasks on critical path are very important and thus they are monitored very closely. PM identifies best resources in the team and assigns them critical tasks. Technical reviews and external dependencies are identified much earlier in project plan which are continuously monitored and escalated to management as and when needed. Periodic demonstrations are conducted to customers of work accomplished to build confidence. At the end of iteration, PM conducts conference room pilot (CRP) meeting. During CRP, business analyst demonstrates the work accomplished to the customers. Customers provide their feedback and accordingly further changes are made or user acceptance testing (UAT) phase starts. Customers are provided access to the product and asked to test and report defects in QB. Please refer figure 8 for summary view of defects reported during UAT phase. PM conducts review meetings to discuss new defects and provides timeline for defects fixes. When UAT phase is complete and customers are satisfied

with the product features, PM works with TL for production deployment and BA conducts training to customers.

QB sends alert to PM as and when milestone date is approaching. PM needs to mark milestones complete in QB or extend milestone date and provide explanation. Milestones are tracked in management and customer review meetings to understand impact of missed milestones and additional effort or budget required. PM communicates issues and new risks identified to customers and management on weekly basis along with mitigation and action plan using issue and risk management process. All the required tasks need to be uploaded in QB for proper visibility to team and management.

Related Contact - Company is Cooper							
EMAIL PRINT OTHER ▾							
Status:	Closed	CR - Pending Approval	Declined	InWork	Need Info	Ready for UAT	TOTALS
Severity	Number of Cases	Number of Cases	Number of Cases	Number of Cases	Number of Cases	Number of Cases	Number of Cases
0 - Critical	79			4	3	3	89
1 - Major	48	1				2	51
2 - Minor	55	15	1	4		1	76
3 - Bug	34						34
TOTALS (13 groups)	216	16	1	8	3	6	21

Figure 8. UAT Defects summary view in QB

Customers would always like to have more and more features developed in product and when that happens, they demand more work from project team. PM works with customers in such cases and follows change management process to accommodate new requests. Customer initiates the new request, for which BA will define requirements and PM works with TL to estimate the effort. PM submits the change request document to customers which details out the efforts and description of the work required to be completed. Customers will review the change request. PM will follow up with customers for change request approval. Once change request is approved, then PM will receive additional budget from accounting department to work on change request in QB. PM will create new tasks for development team and will then allow TL to supervise and get

the work done from developers. When developers complete their work and internal QA test new features, code is promoted to test server for customers to conduct UAT. Hours spent on such activities are charged in QB which is then invoiced by accounting department to customers. Refer to figure 7 for change request document template.

MyCustomer CHANGE REQUEST FORM			
Change Request Details:			
Request #:		Request Date:	
Originator:		Priority Requested:	
Sponsor:		Status:	
Title:			
Description:			
Justification:			
Alternative Solutions:			

Figure 9. Change request document.

Team building is very essential activity in project management. At XYZ we conduct many team building activities such as team lunch on completion of major milestones, cake cutting on birthdays and anniversaries, recognizing individual team member for achieving personal goals, arranging happy hour etc. Team building activities help increasing team moral.

PROJECT CLOSURE

As part of project closure various activities needs to be performed by the project team. PM conducts meeting with customers to review System acceptance checklist and make sure every item mentioned in the checklist is completed. Customers signs off on the checklist and accepts project for operation. XYZ has separate support department to handle production support activities. PM conducts meeting with customers and support group to introduce support group and initiate transition activities. PM assigns tasks for transitioning project knowledge to support group. TL conducts transition meeting with support analyst. Once transition is complete, shadowing activities continues for a period of 2 weeks where support group takes care of production issues under project team supervision. Once shadowing activities are complete, support group handles production support activities independently.

PM works with TL to archive development code, functional design documents, technical design documents and other configuration files into permanent archive repository for later retrieval. PM communicates to support group and customers for any pending change request not yet approved and pending to develop for support group to take care of in future. PM will release remaining resources from project and will update QB records for each project resource allocation. PM will then close project in QB.

PM prepares lessons learned document based on his project experience and also reviews with the team. PM then enters all lessons learned information in QB. PM provides feedback of every individual team members to their respective resource managers.

CONCLUSION

Every company has defined project management processes. As every project demands different needs and different team of people to work with, project management processes should be highly integrated and consistent across organization to follow. As described in this document, project management processes monitoring the project progress and status. Also, it reduces various manual operations and helps individual to identify risks and manage issues effectively. With more and more direct competition in market, companies adopt very high risk strategies for higher profit margin. Thus, following project management processes and making sure that project is delivered to customers as per their expectations is very important.

At XYZ project management processes helps both project manager and management to track project progress, take care of issues and mitigate any risks. Project manager is ultimate responsible for success or failure of the project and thus timely escalation of missed milestones or delay in project is very much required and expected. Assessing skills of team members, identifying strength and weakness of the team, helping team member in area where he/she is weak are important duties project manager is required to perform. Project manager need to define scope of the project and also effectively follow change management otherwise it results into project failure. Project manager needs to conduct project status meetings with customers and higher management to provide project progress and take corrective actions wherever necessary.

Project closure is very important part of the project where project manager closes all the activities in Quickbase and releases resources. Project transition starts with support group and customers are informed with the change in team responsibilities. Every project has different customization and thus it is important that project team conducts proper transition with support group. Quality is very important factor in project execution and thus project manager needs to make sure that quality assurance and quality control processes are corrected implemented in project.

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