

# Today's Agenda

- Demographics & Introductions
- Fitting several lifetimes into a 45-minute presentation
  - Operations vs. Projects
  - Why Try Project Management?
  - Ethics in Project Management
  - Techniques for Early Success
  - Exactly Enough Process
  - Finding the Big Picture
  - Remembering Details
- Taking It Home

# Thank You HDI and RHI

And A Very Special Thanks to My Friends & System Specifiers (alphabetically)

Bob Cummings

Financial Analyst – Legislative Branch

Ellen Donati

Public Sector Operational Service Manager – Legislative Branch

Elaine Filer

Public Sector Project Portfolio Administrator – Legislative Branch

Tom Jones

Public Sector CIO – Executive Branch – General Services

Aaron Karjala

Public Sector Deputy CIO – Executive Branch – Human Services

Steven Li

Public Sector Project Manager – Executive Branch

Chris Ridge

Public Sector IT Professional – Legislative Branch

Darren Starr

Private Sector Longtime IT Entrepreneur

# Alex Chompff – Your Facilitator

## Today

**Information Systems Manager – California Office of Legislative Counsel**

*IT Project Portfolio Administration*

*IT Project Management Standards*

*Continual IT Process Improvement*

**Consultant for friends and family**

*Strategic IT Project Quality Assurance*

*IT Business Architecture & Governance*

## Yesterday

**Project Portfolio Design Consultant – Genentech**

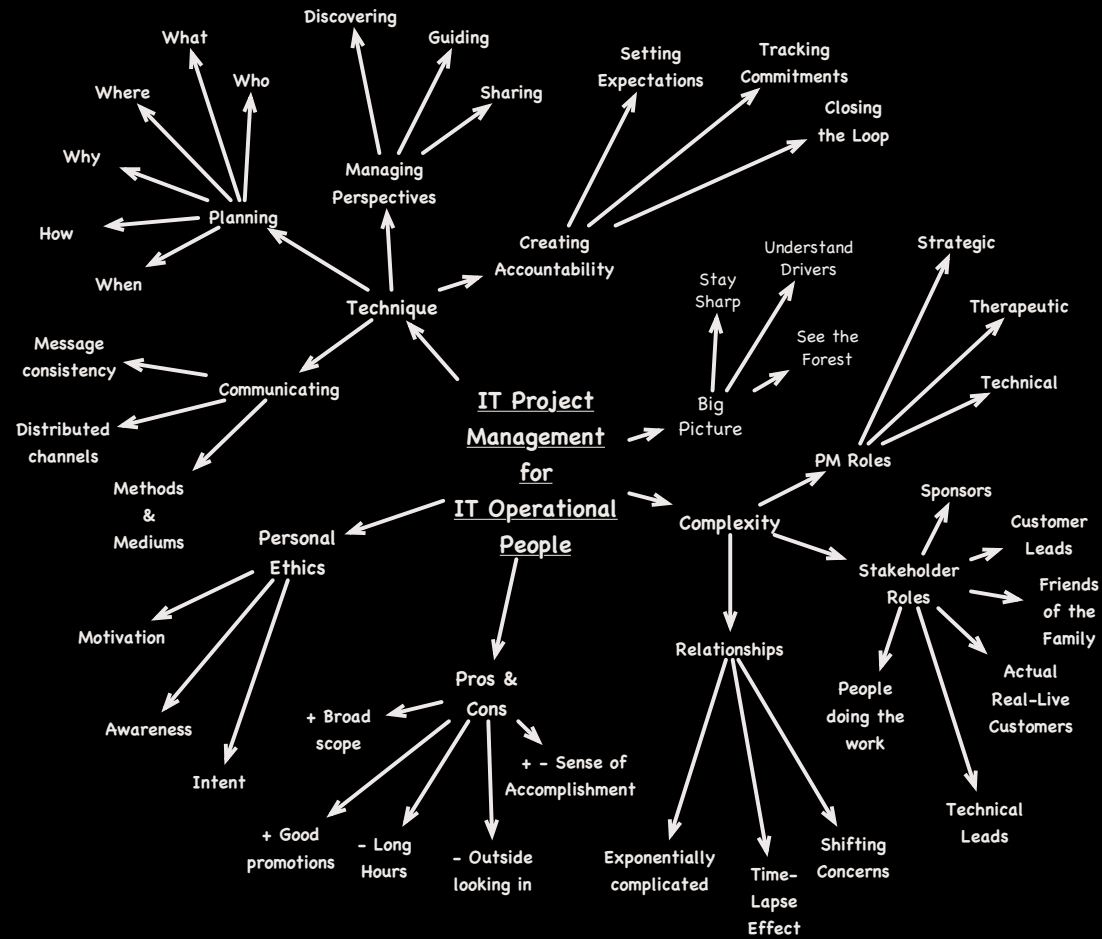
**Network Operations Manager – Nektar Therapeutics**

**IT Manager – Kleiner Perkins Caufield & Byers and Integral Capital Partners**

**Director of Operations & Sales -ComputerCare, Inc.**

**Operations and Sales Manager – A'n D Network Services, Inc.**

There's a lot of stuff to cover in 45 minutes...



# Operations vs. Projects 1A

## IT Operations Usually...

- Keep the lights on.
- Continue for the foreseeable future.
- Are undertaken for a generalized purpose.
- Focus first on customer service – saying yes!

## IT Projects Generally...

- Deliver something new.
- Have a recognizable beginning and end.
- Are undertaken for a specific purpose.
- Focus first on scope, cost and schedule – saying no!

# Operations vs. Projects 1B

## IT Operations in Operational Settings

- Are usually funded and staffed to provide agreed-upon services.
- Are usually pretty well understood in terms of customer expectations and success criteria.
- Generally have experienced, competent and empowered managers.
- Protect the team – even if it means blowing a deadline.

## IT Projects in Operational Settings

- Are generally funded and staffed for a specific length of time.
- Are usually quite vague about expectations and success criteria, at least initially.
- Often have inexperienced project managers with very limited authority.
- Protect scope, cost and schedule – even when it blows up the team.

# Why Try Project Management?

## It Could Be Because...

You're daft.

You don't know any better.

You have a vision.

You want to make a difference.

You want authority right now.

You want to make more money ASAP.

You know PM types are showing off.

This stuff is just plain common sense.

## Or Maybe...

You're curious?

You want to prove yourself.

You're pretty sure it's useful 😊

You have a friend who swears by it.

You received The Assignment from your boss.

You just want to be more effective in a variety of situations.

# PM Ethics - Start with Situational Awareness

## Know Yourself

- Be honest about what motivates you.
- Understand your hopes, dreams and fears regarding this particular project.
- Are you a planner or a doer?
- Sprinter or marathoner?
- Big picture or detailed?
- Idealist or pragmatist?
- Do you prefer starting or finishing?
- Think about and plan for the comfort, care and feeding of the people around you (at home and work) who will be affected by your decision to take on a project.

## Be Conscious of Circumstances

- Where's the funding?
- Who's involved? Why?
- What's been promised?
- How far along is the effort?
- What's the business context?
- Who's managing whom?
- Recognize the strengths and weaknesses of
  - Your people
  - Your leaders
  - The organization
  - Your Assignment

# Good Ethics Are Rooted in A Healthy Frame of Mind

## Remember

- Fairness matters.
- Success starts and ends with you.
- They're probably competent.
- They almost certainly mean well.
- There can be no favorites.
- The team is the team and you are their leader.

## And...

- You're here to do a job.
- You can't do it without the team.
- You're not the king of anything.
- They won't work for you if they don't like you.
- You are uniquely positioned to hash the project - so listen at least as much as you talk.

# Right-Sizing Project Management Processes

- Learn to appreciate the usefulness of a methodology.
  - Ask around – see what's available and what works.
  - Look at the templates – understand why they exist.
  - They wrote it for a reason – but much of it will be too heavy for a novice PM.
- Don't overcommit right away to an unfamiliar methodology.
- **Commit to Plan, Do, Check, Act.**
- Identify and focus on the critical:
  - Roles and responsibilities.
  - Finished scope statement.
  - Clean financials and ongoing reporting.
  - A milestone level schedule (details if you know how).
  - Clear short-term deliverables...accountability on the ground.

# Good Technique Begins with the Basics

## Be Organized

- Sort the piles
  - Schedule
  - Financial
  - People People People
  - Figure out where to keep the Technical Stuff
    - Customer Specifications
    - Procurement Documents
    - Source Code
    - Test Results
    - Deployment Plan....

## Be Intentional

- Think before you act
- Write down your thoughts
  - Make a to-do list
  - Share it with the team
  - Ask for help getting things done!
- Get roles and responsibilities ironed out. Then do it again. Then write them down and send them out. Then double-check with everyone just to make sure.

# Good Technique Requires a Learner's Mind

- Do

- Ask lots of questions
- Read what's available
- Ask the team for help
- Show the team your draft work

Find a successful PM and watch for a while – it's OK to start small.

- Don't

- Assume anything
- Skip the research
- Make it up on your own
- Wait until you're done to share

Find the biggest project you can wrangle – and then tie a rope to it!

# Smooth is Fast...

- Stick with the tools you know
  - E-mail and telephone are old school, and they work just fine.
  - Many projects have been managed successfully with Excel & Word.
  - If you've got and know how to use them:
    - Wikis and threaded conversations are useful.
    - Document repositories with version control can be very helpful.
  - Don't forget that old standby – Face-to-face Meetings
- Don't try to develop a new set of skills while you're trying to lead the team...MS Project is probably not your friend, but if you must...
  - Buy WBS Chart Pro from Critical Tools
  - Buy PERT Chart Expert from Critical Tools

# Find the Big Picture

- Remember that everything is happening in a context.
  - While you're busy working – the world keeps on moving.
  - Millenials are here to stay – and they're different from us.
  - Technology pushes us all – Software is a service & the cloud is real.
- Stay sharp!
  - Be ready to shift focus – don't defend old news.
  - Be open to personal change and new ways of seeing things.
- Understand that you'll probably not lead all the way through.

# Be Close – Details Do Matter

- Don't minimize complexity. The technology stack has a lot of moving parts.
- Get out and go talk to everyone – again and again – 90% of project management is communication.
- **Listen** to the people doing the daily lifting. They are trying to tell you facts that you need to understand. Do not tune them out.
- Do actual work with the system. Learn how to use it. Touch the product with your own hands. There is no substitute for direct experience.

# Bringing It Home

- Reconsider your decision to enter into project management. It's probably not too late!
- If you're going to stay, know why. Why matters because it affects everything you do.
- Remember that smooth IS fast. Stick with the tools you know. Be organized. Be intentional.
- Watch the big picture carefully. Things are moving quickly and you're out in the open. Be ready to shift.
- Finally – don't underestimate complexity. Go and listen. The people doing the work know what they're talking about. Learn from them.

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