



The graphic features the title 'Project Management Best Practices for Beginners' in a large, bold, blue font. Surrounding the title are seven circular icons, each containing a blue line-art symbol: a trash can, a paperclip, an envelope, an hourglass, a magnifying glass, a bar chart with an upward arrow, and two interlocking gears.

Project Management Best Practices for Beginners

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Presented by the SDCOE Enterprise Project Management Office (EPMO)

CASBO San Diego/Imperial Annual Section Conference

Thursday, February 4, 2021 | Virtual (Webex)

Congratulations!

**You have been
asked to oversee
a project!**

Today we will focus on project management best practices to help you with **planning**, **communications**, and **available software** to ensure that you successfully execute your project from start to finish.

Learn how to:

1. Construct a basic project plan
2. Communicate with a status report
3. Use software for tracking





QUICK ACTIVITY: Managing Projects

Directions: In the chat, please type in the name of a project assigned to you at work or a personal project.

PROJECT = Has a start date and an end date (not ongoing work)

BEST PRACTICE #1

Planning

Plan, plan, plan. And make your plan reasonable and realistic.



Project Plan Worksheet

I. Project Name

Project Name Unified Communications Project	Start Date Mar 30, 2020	End Date Sep 25, 2020
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II. Project Organization

Indicate all project team members and how frequently you will communicate with them.

Project Manager <i>Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</i> EPMO Team	Sponsor <i>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</i> CTO
Steering Committee <i>Key people that assist the project manager in making decisions and moving the project forward</i> <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed ITS Leadership +1 participant per Division (5 people from Communications, HR, LLS, Innovation, Bus Services)	Stakeholders <i>An individual, group, or organization that may affect or be affected by outcome of the project</i> <input type="checkbox"/> Weekly <input checked="" type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed All SDCOE Employees, everyone SDCOE engages with
Project Team <i>Supports the project manager in performing work of the project to achieve its objectives</i> <input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed SDCOE Network Team, Help Desk, Professional Learning Team	Others Involved <i>List anyone else who will be involved and state their roles</i> <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed Vendors

III. Project Details

Project Description

Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?

Purpose: The purpose of this project is for unified communications for all SDCOE employees. The ITS Division will provide one holistic solution to replace several tools and applications that are currently used for communications. The selected software is Microsoft Teams, which is part of our Microsoft ecosystem, which integrates with calendar, files, and other solutions.

Scope

Who/how many this will impact? What is included (or not included) that can help manage the expectations?

- **SDCOE ITS will implement an IP-based communication system that unifies voice and video communications.**
- **Every SDCOE employee will be trained and can use Microsoft Teams for all communications (chat, video, voicemail, phone calls, document sharing).**

Out of Scope: ServiceNow integration, including a dedicated call center. Fax is not part of the project. Alarms, elevators, faxes will remain the same for now.

Objectives/Success Criteria

How will you know if the project was a success? List what you are trying to accomplish and the success criteria.

- **All employees can make a phone call (app, client, or desktop phone), video call, and chat without someone helping them make the call.**
- **Employees find it user-friendly and intuitive.**
- **Employees know and use the best-matched tool for the appropriate reason (Yammer vs Teams, Teams to replace a Google doc, Skype vs Teams, Zoom vs Teams)**

Deliverables

Which products or results do you expect upon completion of the project?

- **Voice, video, collaboration tool for all SDCOE employees integrated with email and Office365**
- **There will be a replacement for desk phone – Hardware/software to engage with Microsoft Teams (some will have a soft phone - camera, headset, PC).**
- **Training plan**
- **Communication plan**
- **Risk register and mitigation plan**
- **Test plan and UAT criteria**

Risks

List the things that you think could be risks to the success of the project. If possible, list the mitigation strategy for each risk.

TECHNOLOGY

- **Phone numbers not porting over, equipment does not arrive on time**
- **Potential improper Security setup and permissions (lack of governance could cause problems)**
- **Possible poor voice quality**

ORGANIZATIONAL CHANGE MANAGEMENT & GOVERNANCE

- **User buy-in and acceptance**
- **Lack of urgency by employees to use the product; lack of integration/adoption**
- **Unclear or lack of communication around expectations, policies/procedures, training**
- **Lack of resources (proper amount, the right ones, etc.) for training Teams**

ENVIRONMENT

- **Unstable work environments during quarantine**
- **Internet access required to use the solution (part of the utility already provided, not a new requirement)**




























IV. Project Schedule & Milestones

Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

(UC) Unified Communications Project ★

Add board description

 Main Table / 6 ▾

▼ Project Charter/Plan		Subitems	Status	Goals Alignment	Owner	Timeline
Develop Project Charter Worksheet			Complete	#ITS3 #ITS2		Mar 30 - Apr 10
Create Project Charter Presentation (PPT)			Complete	#ITS3 #ITS2		Apr 7 - 13
Present the Charter to Terry			Complete	#ITS3 #ITS2		Apr 10
Receive authorization to proceed (charter approval)			Complete	#ITS3 #ITS2		Apr 15
Present to Steering Committee (ITS Leads)			Complete	#ITS3 #ITS2		Apr 15
Present to SLT			Complete	#ITS3 #ITS2		Apr 16
Official Project Kickoff Meeting			Complete	#ITS3 #ITS2	 +2	Apr 16
Create Project Plan			Complete	#ITS3 #ITS2	 +2	Apr 6 - 24
Create Risk Register			Complete	#ITS3 #ITS2	 +2	Apr 13 - 28

4 QUESTIONS TO ASK YOURSELF

With whom do I need to communicate?

- Project Team
- Stakeholders
- Steering Committee

How often am I communicating?

- Every Week, Bi-Weekly, Monthly

What is the agreed upon method of communication?

- In person or online during COVID (team meeting, standup meeting, 1:1)
- Email
- Web conference (Microsoft Teams, Zoom)
- Phone conference

What am I communicating?

- Status Report
- Accomplished Tasks/Activities
- Tasks/Activities that need to be completed
- Potential Risks/Roadblocks and Mitigation



BEST PRACTICE #2

Communication

Communication is a key to
a successful project.

Unified Communications Project

Weekly Status Report

Reporting Period	Prepared By	Current Status
July 6-July 10, 2020 (Week 5 of 20)	Flora Pourzamani	On Track

Accomplishments

- Completed Phone Deployment for Business Services and Student Services on campus
- Published the How to Set Up and Use a Team guide (23 pp.)
- Advisory Team members sent standardized Go Live announcement to their divisions on Thu, 7/9

In Progress

- Phone Deployment for ITS
- Managing incoming questions and adding to FAQs document
- Creating a job aid to instruct employees on functions in Outlook that are connected to Teams

Next Steps

- Create presentation and conduct workshop to explain Teams features on Tue, 7/21
- Create an infographic one-pager for Teams Video Call Best Practices
- Phone Deployment for NCREC and SCREC
- Transition planning for questions and support

Risks

- Numerous tasks still occurring in a short period of time – we continue to rely on Monday.com, status reports, and clear communication to ensure tasks are not forgotten

Communications Matrix

You can use a Communications Matrix to think through all the people/groups you should be communicating with from start to finish.

INFORMATION	DELIVERY METHOD	FREQUENCY	OWNER (Sender)	AUDIENCE (Recipients)
Kickoff Meeting	Teams or Zoom	Once	Project Manager	Project team Sponsor Stakeholders
Project Team Meetings	Teams or Zoom	Weekly	Project Manager	Project team
Monthly Status Meetings	Teams or Zoom	Monthly	Project Manager	Project Stakeholders
Status Reports	Email	Weekly/Monthly	Project Manager	Everyone involved with the project



QUICK ACTIVITY: Communication Methods

Directions: In the chat, please share the ways you communicate with others within your organization that you find effective.



TYPES OF ITEMS TO TRACK

Tasks

Deadlines

Dependencies

Progress

Issues

Risks

BEST PRACTICE #3

Monitoring and Tracking

So...you have a plan and you know how you are going to communicate. Now it's time to monitor progress and track task completion.



QUICK ACTIVITY: Software

Directions: In the chat, please type in the software you are currently using within your organization (i.e., Microsoft Office or Google Suite).

Project Management Software

Project Management Task	Microsoft Office	Google	Other Software
Project Document Management (repository)	OneDrive or SharePoint	Google Drive	dropbox.com box.com
Project Plan	Word	Google Doc	monday.com asana.com openproject.org
Project Task Tracking	Excel or Planner	Google Sheets	monday.com trello.com todoist.com
Collaboration/ Communication Methods	Outlook, Teams	Gmail, GHangouts	zoom.us slack.com
Status Reports	Word, PowerPoint	Google Docs, Google Slides	smartsheet.com

Excel Example

SAMPLE COLUMN HEADERS

Activity

Responsible

Dates

Status

Progress

A	B	C	D	E	F
Communications Plan					
Activity	Responsible	Start Date	End Date	Status	Progress
Develop Communications Plan	Reesa Fickett, Flora Pourzamani	04/13/20	04/22/20	Complete	100%
Determine feedback systems within Teams and via email	Peyri Herrera	04/13/20	04/22/20	Complete	100%
Schedule project meetings, attend/record/publish meeting notes, and record/post videos as needed	Candace Wong	04/13/20	09/25/20	Complete	100%
Meeting with Andy Q. from PL Team to clarify role, timeline, expectations, and process	Peyri Herrera, Reesa Fickett, Flora Pourzamani, Candace Wong	04/15/20	04/17/20	Complete	100%
Communication to ITS Managers Teams is coming, its objective and timelines	Peyri Herrera	04/17/20	04/17/20	Complete	100%
Establish Advisory Team	Peyri Herrera	04/17/20	04/22/20	Complete	100%
Create stakeholder register	Flora Pourzamani, Reesa Fickett, Candace Wong	04/17/20	04/23/20	Complete	100%
Create key messages, calls to action, and expectations	Peyri Herrera	04/20/20	05/01/20	Complete	100%
Determine feedback systems for Project Team	Peyri Herrera	04/20/20	04/24/20	Complete	100%
Initial email to Professional Learning (PL) to make them aware of their role; schedule F2F	Peyri Herrera	04/20/20	04/24/20	Complete	100%
Communicate to JCCS Managers Teams is coming, its objective and time lines	Peyri Herrera, Reesa Fickett, Flora Pourzamani	04/20/20	04/24/20	Complete	100%
Create ServiceNow incident for Teams	Reesa Fickett, John Vaillancourt	04/23/20	05/01/20	Complete	100%
Update ITS Remote Work > Olympics Channel with posts about new Teams features/info	Peyri Herrera, Reesa Fickett	04/23/20	07/10/20	Complete	100%
Attend Teams webinars and training to stay current with issues and features - and communicate out	Reesa Fickett, Candace Wong	04/24/20	08/27/20	Complete	100%
Promote Teams and the UC Project on SDCOE social media accounts (e.g. Twitter, Yammer)	Reesa Fickett	04/24/20	08/31/20	Complete	100%
Maintain Communications Templates document to capture mass correspondence about the project	Candace Wong	04/24/20	09/25/20	Complete	100%
Info page created on Common Ground about project	Peyri Herrera	05/05/20	05/05/20	Complete	100%
FAQs completed and added to info page	Peyri Herrera, Candace Wong	05/05/20	05/05/20	Complete	100%
Email sent from Terry to all employees announcing project	Peyri Herrera	05/05/20	05/05/20	Complete	100%

(UC) Unified Communications Project ★

Add board description



Integrate / 0

Automate / 1

 Main Table / 6 ▾

New Item ▾

Search

Monday.com UC Project Board

Project Charter/Plan

Communications Plan

Training Plan

Microsoft Teams Olympics for ITS

Champion Program

Teams Configuration

Phone System Configuration

Testing Plan

Roll Out Plan

Vendor Tasks

Governance

Main SDCOE Call Tree

Meetings & Trainings





































Transition/Closure Phase Plan

Consider monitoring and tracking your project from start to finish with project management software, such as Monday.com.



Monday.com Monitoring & Tracking

Champion Program

		Subitems	Status	Goals Alignment	Owner	Timeline
Develop and Launch Champion Program (see Champio...			Complete	#ITS2 #ITS3	 +2	Apr 13 - May 11
Define Feedback Systems		 2	Complete	#ITS2 #ITS3	 +2	Apr 13 - 17
Recruit Champions			Complete	#ITS2 #ITS3		Apr 21
Add Champions to Stakeholder Register			Complete	#ITS2 #ITS3		Apr 23 - 25
Communicating to Champions via e-mail		 4	Complete	#ITS2 #ITS3		Apr 23
Meeting with Champions to explain the plan		 7	Complete	#ITS2 #ITS3		Apr 27
Follow up with Champions on questions via Teams Cha...			Complete	#ITS2 #ITS3	 +2	Apr 27 - Sep 25
Run through Olympic activities with them			Complete	#ITS2 #ITS3	 +2	Apr 29 - May 6
Follow Up with Champions on their Teams features acti...		 1	Complete	#ITS2 #ITS3	 +2	May 1 - Jul 10
Create and provide to Champions the first e-mail sampl...			In Progress	#ITS2 #ITS3	 +2	May 8
Create and provide to Champions the first e-mail Manag...			At Risk	#ITS2 #ITS3	 +2	May 8
Review Master Training Calendar with Champions and ...			Not Started	#ITS2 #ITS3		May 8 - 19

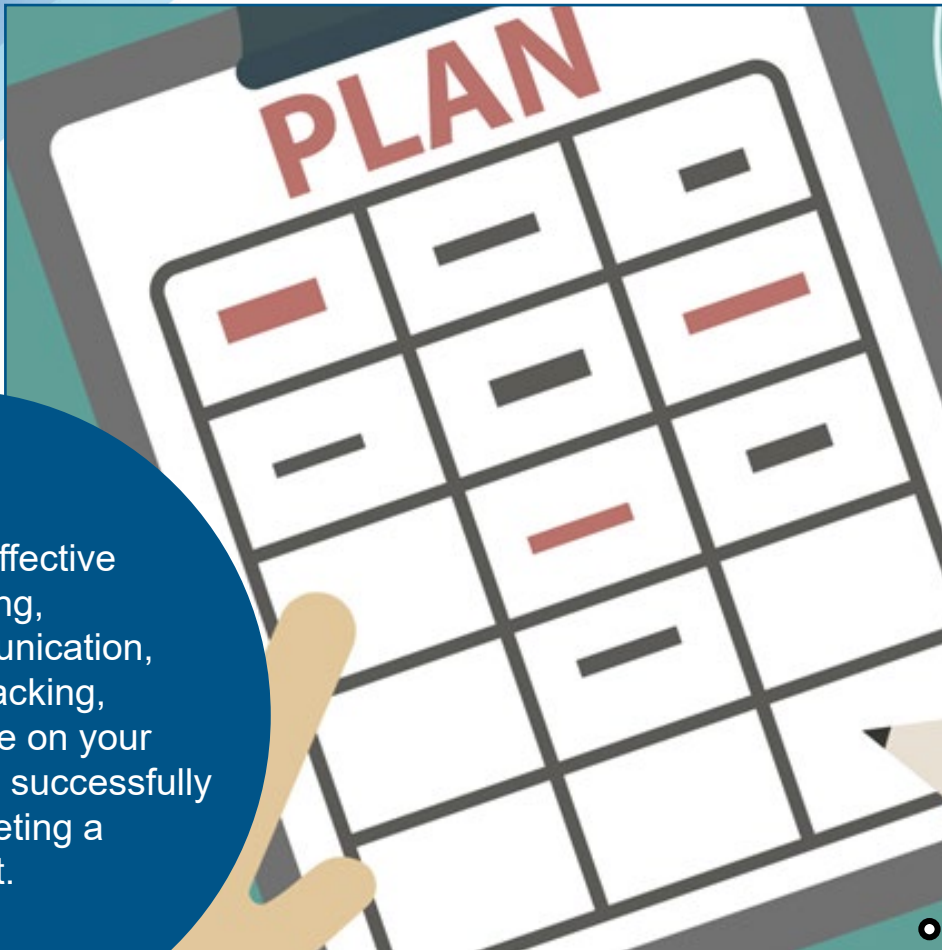
Monday.com helps teams manage their tasks and workflows. You can assign different tasks to different Owners on a board. Information is tracked, transparent, and updated in real-time.

Congratulations!

**You're on your way
to successfully
completing
your project!**

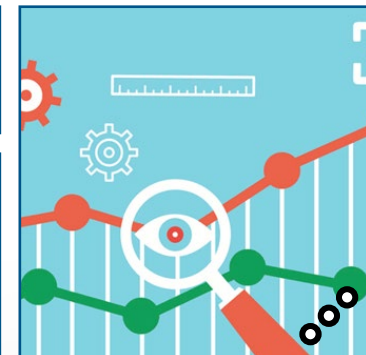
PROJECT SUCCESS = On time, on budget, achieves objectives

With effective planning, communication, and tracking, you are on your way to successfully completing a project.



ON TIME
ON BUDGET

ACHIEVES
PROJECT
OBJECTIVES



- 1: Plan
- 2: Communicate
- 3. Monitor & Track



QUICK ACTIVITY: Takeaways

Directions: In the chat, please share, **1** takeaway and **1** thing would like to learn more about after this workshop.

Questions?



Thank you!

Contact us at EPMO@sdcoe.net:

- Flora Pourzamani
- Reesa Fickett
- Candace Wong

Enterprise Project Management Office (EPMO)