

# 3, 2, 1, Blast Off!

## How to Successfully Plan and Launch Your Next PeopleSoft Project

Enterprise Project Management Office (EPMO)



Charting the Course in a Brave New World

March 8 - 9, 2023

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# MEET OUR TEAM



*"Say 'hello' to my little project charter!"*

-Tony Montana  
Scarface

**Peyri Herrera**  
Senior Director  
Integrated Technology Services



*"I find your lack of project plan disturbing."*

-Darth Vader  
Star Wars

**Reesa Fickett, PMP**  
Senior Project Manager  
Integrated Technology Services



*"I love the smell of standup meetings in the morning."*

-Lt. Colonel Kilgore  
Apocalypse Now

**Andrew Baldwin, PMP**  
Project Manager  
Integrated Technology Services



*"Live long, and provide status reports."*

-Spock  
Star Trek

**Candace Wong**  
Project Management Assistant  
Integrated Technology Services



san diego county office of  
**EDUCATION**  
FUTURE WITHOUT BOUNDARIES™

Enterprise  
Project  
Management

Office



[epmo.sdcoe.net](https://epmo.sdcoe.net)



## CHAT ACTIVITY:

Share the name  
of a project you're  
currently working on  
(or have coming up)

What's going  
on in your  
department?



## PeopleSoft Examples:

- Integrating PeopleSoft data with another system
- Performing a security audit
- Moving to a paperless office with digital documents
- Implementing a new PeopleSoft module, like Recruiting
- Establishing a training/onboarding program





# Session Goals



**01**

"I know the major phases of project management."

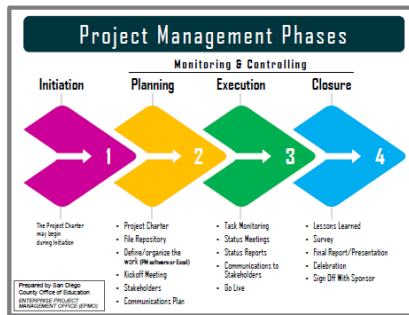
**02**

"I understand how to use the SDCOE project charter template to **plan** my next project."

**03**

"I can refer to 2 checklists to help me **execute** my next project."





Start here

## PLANNING

## EXECUTION



**Project Charter DRAFT**

Project authorized by \_\_\_\_\_ on \_\_\_\_\_

**I. Project Name**  
Project Name: X Start Date: XXXXXX End Date: XXXXXX

**II. Project Organization**  
Identify all project team members and how frequently you will communicate with them.

**Project Manager**  
The project manager reports to the sponsor, leads project team, and is responsible for achieving the project objectives.  
• X

**Sponsor**  
The sponsor provides vision, resources to support the project and has the ultimate authority for the project.  
• X

**Stakeholders**  
Identify all stakeholders who have an interest in the project.  
• X

**Steering Committee**  
The steering committee provides oversight and guidance to the project manager.  
• X

**Project Team**  
The project team consists of all team members who are involved in the project.  
• X

**III. Project Details**  
**Project Description**  
Provide a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?  
X

**Scope**  
What are the many things you will impact? What is included (or not included) that can help manage the expectations?  
• X

**Deliverables**  
What products or results do you expect upon completion of the project?  
• X

SDCE Integrated Technology Services (ITS)

**PROJECT MANAGEMENT TOOLKIT**  
**Key Activities of the Execution Phase**

1. Monitor the project plan frequently. Team members should update their status.
2. Check in with team members as needed. Establish rapport with the team; make a plan and conduct meetings, determine action items.
3. Lead status meetings. Meeting duration and frequency will vary. These are typically short daily meetings.
4. Lead standup meetings as needed. Manage the project.
5. Identify new activities or adjust. Watch out for scope creep (new starts).
6. Monitor risks. Quickly address any risks.
7. Monitor budget, if required. Track project costs. Communicate the status.
8. Prepare and send status. Capture accomplishments, if present.
9. Communicate up and out when needed. Stay in touch with your steering committee and stakeholders.
10. Prepare for Go Live. Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.

SDCE Integrated Technology Services (ITS)

**Go Live Checklist (Starting Point)**

**Testing and Sign Off**

- ☐ Have user acceptance testing been completed?
- ☐ Have all issues related to going live been resolved?
- ☐ Have the appropriate party (Project Sponsor or other) given approval to proceed with moving live?
- ☐ If appropriate, has the "service" been tested?
- ☐ Do we have a backup plan, if needed?

**Support Team**

- ☐ Have support staff been trained and/or provided?
- ☐ If necessary, has the "service" been added to your service catalog?
- ☐ If necessary, has the vendor been notified that their support personnel need to be engaged?
- ☐ Do you have a clear plan for "day 1" support?

**Training & Communication**

- ☐ Has training been provided to employees/users, and are additional roles available?
- ☐ Has the go-live date and other important information been communicated to all project stakeholders?

**Go / No Go Meeting**  
Are we ready? Is it a go?

SDCE Integrated Technology Services (ITS)

[Click here for session handouts](#)



**01**

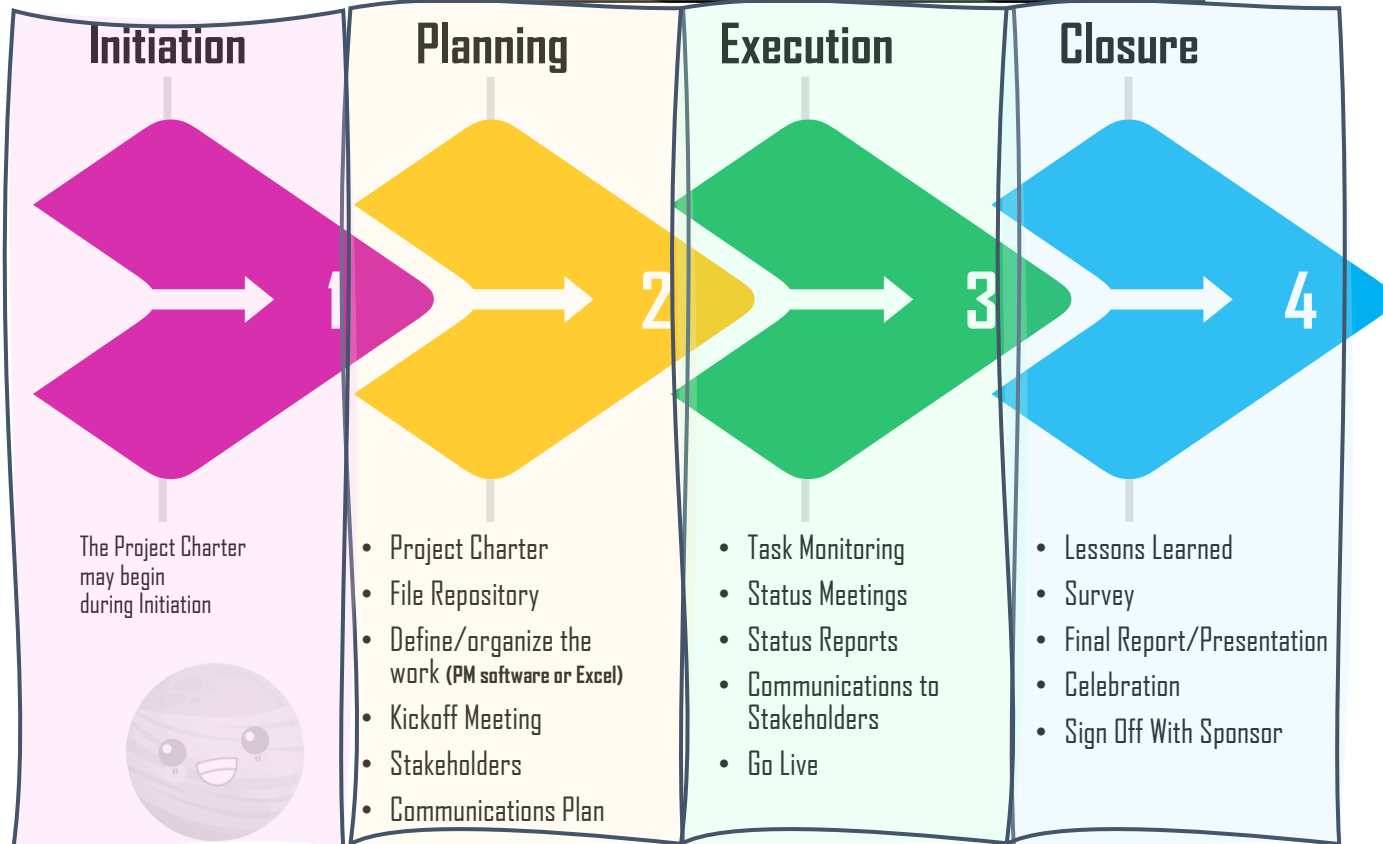
# PROJECT MANAGEMENT PHASES

Planning, Execution, and Closure



# Project Management Phases

## Monitoring & Controlling







**02**

# THE PROJECT CHARTER

What type of information goes in a project charter? Why do we write one?







# The Project Charter

Authorization + Planning + Expectations + Clarity



**Project Charter DRAFT**

Project authorized by \_\_\_\_\_ on \_\_\_\_\_

**I. Project Name**

Project Name X	Start Date XXXXXXXX	End Date XXXXXXXX
----------------	---------------------	-------------------

**II. Project Organization**

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

<b>Project Manager</b> Sponsors the project, sets goals, reports on status, leads project team that is responsible for achieving the project objectives. • X	<b>Sponsor</b> The top decision maker authorized to engage the project and fund it. Has ultimate authority and responsibility for the project. • X
<b>Steering Committee</b> Any people that assist the project manager in making decisions and resolving the project's issues. • X	<b>Stakeholders</b> An individual, group, or organization that may affect or be affected by outcomes of the project. • X
<b>Project Team</b> Supports the project manager in performing work of the project to achieve its objectives. • X	<b>Others Involved</b> All anyone else who will be involved and state their role. • X

**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?  
X

**Scope**  
What/how many things will impact? What is included (or not included) that can help manage the expectations?  
In scope:  
• X  
Out of scope:  
• X

**Deliverables**  
What products or results do you expect upon completion of the project?  
• X

SDCOE Integrated Technology Services (ITS) Project Charter | 1

## I. Project Name

Project Name X	Start Date XX/XX/XX	End Date XX/XX/XX
----------------	---------------------	-------------------





# The Project Charter

Authorization + Planning + Expectations + Clarity

**Project Charter DRAFT**

Project authorized by \_\_\_\_\_ on \_\_\_\_\_

**I. Project Name**

Project Name	X	Start Date	XXXXXXXX	End Date	XXXXXXXX
--------------	---	------------	----------	----------	----------

**II. Project Organization**

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

<b>Project Manager</b> Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives • X	<b>Sponsor</b> The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project • X
<b>Steering Committee</b> Any people that assist the project manager in making decisions and moving the project forward • X	<b>Stakeholders</b> An individual, group, or organization that may affect or be affected by outcome of the project • X
<b>Project Team</b> Supports the project manager in performing work of the project to achieve its objectives • X	<b>Others Involved</b> List anyone else who will be involved and state their roles • X

**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?  
X

**Scope**  
Whoflow many this will impact? What is included (or not included) that can help manage the expectations?  
In scope:  
• X  
Out of scope:  
• X

**Deliverables**  
What products or results do you expect upon completion of the project?  
• X

SDCOE Integrated Technology Services (ITS) Project Charter | 1

## II. Project Organization

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

<b>Project Manager</b> Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives • X	<b>Sponsor</b> The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project • X
<b>Steering Committee</b> Key people that assist the project manager in making decisions and moving the project forward • X	<b>Stakeholders</b> An individual, group, or organization that may affect or be affected by outcome of the project • X
<b>Project Team</b> Supports the project manager in performing work of the project to achieve its objectives • X	<b>Others Involved</b> List anyone else who will be involved and state their roles • X





# The Project Charter

Authorization + Planning + Expectations + Clarity

## 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?

X

### Scope

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

In scope:

- X

Out of scope:

- X

### Deliverables

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

- X

**Project Charter DRAFT**

Project authorized by \_\_\_\_\_ on \_\_\_\_\_

**I. Project Name**

Project Name: X Start Date: XXXXXXXX End Date: XXXXXXXX

**II. Project Organization**

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

Project Manager	Sponsor	Steering Committee	Stakeholders	Project Team	Others Involved
Indicates the project work plan, reports or delays, leads project team that is responsible for achieving the project objectives.	The top decision maker authorized to engage the project and fund it, has ultimate authority and responsibility for the project.	Any people that assist the project manager in making decisions and meeting the project's demand.	An individual, group, or organization that may affect or be affected by outcomes of the project.	Supports the project manager in performing work of the project to achieve its objectives.	Get anyone else who will be involved and state their role.
<ul style="list-style-type: none"><li>• X</li></ul>	<ul style="list-style-type: none"><li>• X</li></ul>	<ul style="list-style-type: none"><li>• X</li></ul>	<ul style="list-style-type: none"><li>• X</li></ul>	<ul style="list-style-type: none"><li>• X</li></ul>	<ul style="list-style-type: none"><li>• X</li></ul>

**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?  
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Scope  
Who/how many this will impact? What is included (or not included) that can help manage the expectations?  
In scope:  
• X  
Out of scope:  
• X

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

EDUC Integrated Technology Services (ITS) Project Charter 1





# The Project Charter

Authorization + Planning + Expectations + Clarity

**Goals Alignment**  
With which Board Goals and ITS Goals does this project align?

☐ #B1 Connect the educational experience to the world of work  
☐ #B2 Provide educational opportunities and supports to SDCOE schools and school districts  
☐ #B3 Become the leader and model for innovation  
☐ #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE

☐ #ITS1 Maximize Customer Success  
☐ #ITS2 Create Value  
☐ #ITS3 Improve Division Efficiencies  
☐ #ITS4 Protect-Detect-Respond

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

- X

**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.

- X

**IV. Project Schedule & Milestones**  
Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

SDCOE Integrated Technology Services (ITS) Project Charter | 2

## Goals Alignment

With which Board Goals and ITS Goals does this project align?

- ☐ #B1 Connect the educational experience to the world of work  
☐ #B2 Provide educational opportunities and supports to SDCOE schools and school districts  
☐ #B3 Become the leader and model for innovation  
☐ #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE
- ☐ #ITS1 Maximize Customer Success  
☐ #ITS2 Create Value  
☐ #ITS3 Improve Division Efficiencies  
☐ #ITS4 Protect-Detect-Respond

## Objectives/Success Criteria

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

- X

## 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.

- X





# The Project Charter

Authorization + Planning + Expectations + Clarity

## IV. Project Schedule & Milestones

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

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

**Goals Alignment**  
With which Board Goals and ITS Goals does this project align?  
☐ M01 Connect the educational experience to the world of work  
☐ M02 Provide educational opportunities and exposure to SCODE schools and virtual datasets  
☐ M03 Increase the value and reach for education  
☐ M04 Maximize formal and informal resources to strengthen the organizational culture of SCODE  
☐ M05 Maximize Customer Success  
☐ M06 Create Value  
☐ M07 Increase Student Engagement  
☐ M08 Increase Productivity

**Objectives/Success Criteria**  
How will you know if the project was a success? List what you are trying to accomplish and the success criteria.  
• X

**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.  
• X

### IV. Project Schedule & Milestones

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

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

SCODE Integrated Technology Services (ITS)

Project Charter | 2





## Your well-written, detailed Project Charter will address a variety of questions.

**WHO**

- Who's involved, who's doing the work? Who is this for? Who's impacted?

**WHAT**

- What is the scope? What are we delivering? What are the risks? What is the cost?

**(WHERE)**

- Which database, environment, etc.? Which physical location, room, building, etc.?

**WHEN**

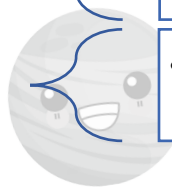
- What is the project schedule? What are the milestones?

**WHY**

- Why are we doing this project?

**HOW**

- How does this align with our mission and goals? How will we know we are successful? How will we communicate (project team, stakeholders, etc.)?





**03**

# EXECUTION PHASE CHECKLIST

All that project planning pays off  
when you are in Execution!







# Please find this page!

Can you identify  
the 10 key activities  
of the  
Execution Phase?

[Click here for session handouts](#)



## PROJECT MANAGEMENT TOOLKIT

### What are the key activities of the Execution Phase?

Directions: Use the word bank to fill in the key activities that occur during the Execution Phase.

#### WORD BANK

- budget
- Go Live
- new
- project plan
- risks
- standup
- status
- status reports
- team members
- up / out

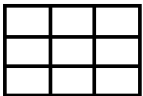
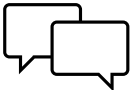
Key Project Management Activities During Execution		
Monitor progress, keep track of the calendar and milestones		
1		Monitor the _____ frequently. <i>Team members should update their status and add new tasks.</i>
2		Check in with _____ as needed. <i>Establish rapport with the team; make sure there are no roadblocks.</i>
Plan and conduct meetings, determine action items and assign next steps		
3		Lead _____ meetings. <i>Meeting duration and frequency will vary by project.</i>
4		Lead _____ meetings as needed. <i>These are typically short daily meetings (15 min).</i>
Manage the project		
5		Identify _____ activities or adjustments to the plan. <i>Watch out for scope creep (new scope added after the project starts).</i>
6		Monitor _____. <i>Quickly address any risks.</i>
7		Monitor _____, if required. <i>Track project costs.</i>
Communicate the status of your project		
8		Prepare and send _____. <i>Capture accomplishments, in progress, what's next, and risks.</i>
9		Communicate _____ and _____ when needed. <i>Stay in touch with your sponsor, steering committee, and stakeholders.</i>
Go Live (become operational)		
10		Prepare for _____. <i>Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.</i>





# Key Activities of the Execution Phase





Monitor progress, keep track of the calendar and milestones		
1		Monitor the <u>project plan</u> frequently. <i>Team members should update their status and add new tasks.</i>
2		Check in with <u>team members</u> as needed. <i>Establish rapport with the team; make sure there are no roadblocks.</i>





# Key Activities of the Execution Phase




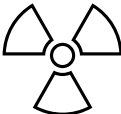

Plan and conduct meetings, determine action items and assign next steps		
3		Lead <u>status</u> meetings. <i>Meeting duration and frequency will vary by project.</i>
4		Lead <u>standup</u> meetings as needed. <i>These are typically short daily meetings (15 min).</i>





# Key Activities of the Execution Phase





Manage the project		
5		Identify <u>new</u> activities or adjustments to the plan. <i>Watch out for scope creep (new scope added after the project starts).</i>
6		Monitor <u>risks</u> . <i>Quickly address any risks.</i>
7		Monitor <u>budget</u> , if required. <i>Track project costs.</i>





# Key Activities of the Execution Phase




Communicate the status of your project		
8		Prepare and send <u>status reports</u> . <i>Capture accomplishments, in progress, what's next, and risks.</i>
9		Communicate <u>up</u> and <u>out</u> when needed. <i>Stay in touch with your sponsor, steering committee, and stakeholders.</i>



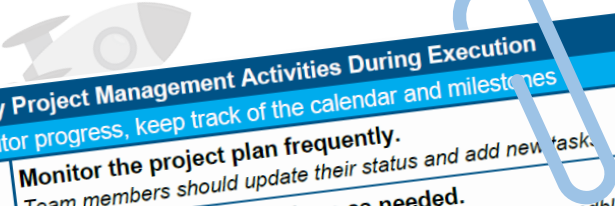












# Key Activities of the Execution Phase



Go Live (Become operational)		
10		<p>Prepare for <u>Go Live</u>.</p> <p><i>Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.</i></p>





Key Project Management Activities During Execution		
Monitor progress, keep track of the calendar and milestones		
1		<b>Monitor the project plan frequently.</b> <i>Team members should update their status and add new tasks.</i>
2		<b>Check in with team members as needed.</b> <i>Establish rapport with the team; make sure there are no roadblocks.</i>
Plan and conduct meetings, determine action items and assign next steps		
3		<b>Lead status meetings.</b> <i>Meeting duration and frequency will vary by project.</i>
4		<b>Lead standup meetings as needed.</b> <i>These are typically short daily meetings (15 min).</i>
Manage the project		
5		<b>Identify new activities or adjustments to the plan.</b> <i>Watch out for scope creep (new scope added after the project starts).</i>
6		<b>Monitor risks.</b> <i>Quickly address any risks.</i>
7		<b>Monitor budget, if required.</b> <i>Track project costs.</i>
Communicate the status of your project		
8		<b>Prepare and send status reports.</b> <i>Capture accomplishments, in progress, what's next, and risks.</i>
9		<b>Communicate up and out when needed.</b> <i>Stay in touch with your steering committee and stakeholders.</i>
Go Live (Become operational)		
10		<b>Prepare for Go Live.</b> <i>Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.</i>

# Take a look at the list...



**Q:** Which skills are *essential* to effectively lead/complete these key activities?





04



# GO LIVE CHECKLIST

Get ***everyone*** ready for your launch!



---

**Go Live =** To become operational; the time at which something becomes available for use

---



For the last 7 months, ABC Unified has been working on a project to implement a new budgeting system.



Next month is Go Live. The team has been working hard, but is the system ready? Are their users ready?



**Q:** What is usually your top area of focus before the launch of a new initiative?



# Go Live Checklist (Starting Point)



## Testing and Sign Off



- ☐ Has user acceptance testing been completed?
- ☐ Have all issues related to going live been resolved?
- ☐ Has the appropriate party (Project Sponsor or other) given acceptance to proceed with moving the delivered system, service or product into production?
- ☐ If applicable, has your Change Control Board been notified?
- ☐ Do we have a backout plan, if needed?



## Support Team



- ☐ Have your support staff been trained and/or provided documentation?
- ☐ Are they prepared to provide ongoing support?
- ☐ If necessary, has the “service” been added to your service catalog?
- ☐ If necessary, has the vendor been notified that their support processes need to be engaged?
- ☐ Do you have a clear plan for “Day 1” support procedures, and has that been communicated to the team?

## Training & Communication



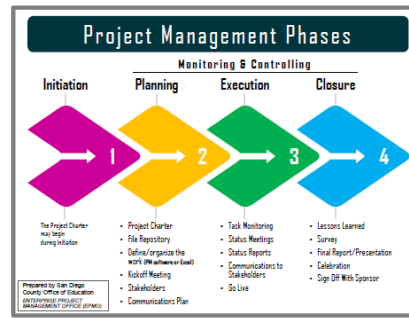
- ☐ Has training been provided to employees/users, and job aids/videos made available?
- ☐ Has the go live date and other important information been communicated to all project stakeholders?



---

**Go / No Go Meeting**  
Are we ready?  
Is it a go?

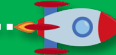
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**Q:** Which tool are you most excited to try?

## PLANNING

## EXECUTION



**Project Charter DRAFT**

Project authorized by \_\_\_\_\_ on \_\_\_\_\_

**I. Project Name**  
Project Name: X Start Date: XXXXXXXX End Date: XXXXXXXX

**II. Project Organization**  
Identify all project team members and how frequently you will communicate with them.

Project Manager	Sponsor	Stakeholders	Others Involved
<ul style="list-style-type: none"> <li>Project Manager</li> <li>Steering Committee</li> <li>Project Team</li> </ul>	<ul style="list-style-type: none"> <li>Sponsor</li> <li>Stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>Stakeholders</li> <li>Others Involved</li> </ul>	<ul style="list-style-type: none"> <li>Others Involved</li> </ul>

**III. Project Details**  
Project Description: X  
Scope: X  
Deliverables: X

SDCOE Integrated Technology Services (ITS)

**PROJECT MANAGEMENT TOOLKIT**  
Key Activities of the Execution Phase

Key Project Management Activities During Execution
1. Monitor the project plan frequently. Team members should update their status.
2. Check in with team members as needed. Establish rapport with the team; make status reports.
3. Lead status meetings. Meeting duration and frequency will vary.
4. Lead standup meetings as needed. These are typically short daily meetings.
5. Identify new activities or adjust scope for scope creep (new starts).
6. Monitor risks. Quickly address any risks.
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9. Communicate up and out when needed. Stay in touch with your steering committee and stakeholders.
10. Prepare for Go Live. Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.

SDCOE Integrated Technology Services (ITS)

**Go Live Checklist (Starting Point)**

Testing and Sign Off

Support Team

Training & Communication

Go / No Go Meeting  
Are we ready?  
Is it a go?

[Click here for session handouts](#)



# Can you say 'Yes' to these?



## SESSION GOALS:

**01**

"I know the major phases of project management."

**02**

"I understand how to use the SDCOE project charter template to **plan** my next project."

**03**

"I can refer to 2 checklists to help me **execute** my next project."



# Project Management Toolkit

<https://epmo.sdcoe.net>

## RESOURCES

Intro

Project Charter

Project Plan

Status Meetings & Reports

Execution & Go Live

Closure

More



← Videos

Files  
↓



Phases of a Project [PDF]



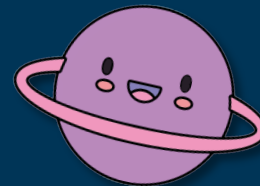
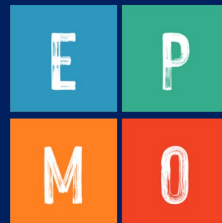
How to Serve as a Project Team Member [PDF]



Project Roles and Responsibilities [PDF]



# THANKS!



Enterprise

Project

Management

Office

Charting the Course in a Brave New World

March 8 - 9, 2023



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