3, 2, 1, Blast Off!
How to Successfully Plan and Launch Your Next PeopleSoft Project

Enterprise Project Management Office (EPMO)
**MEET OUR TEAM**

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**Peyri Herrera**
Senior Director
Integrated Technology Services

*Say “hello” to my little project charter!*

-Tony Montana
Scarface

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

*I find your lack of project plan disturbing.*

-Darth Vader
*Star Wars*

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

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

-Lt. Colonel Kilgore
*Apocalypse Now*

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

*Live long, and provide status reports.*

-Spock
*Star Trek*
What’s going on in your department?

CHAT ACTIVITY: Share the name of a project you’re currently working on (or have coming up)

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.”
PM TOOLKIT

PLANNING

EXECUTION

Click here for session handouts
The Project Charter may begin during Initiation

Initiation

Project Management Phases

Monitoring & Controlling

Planning

• Project Charter
• File Repository
• Define/organize the work (PM software or Excel)
• Kickoff Meeting
• Stakeholders
• Communications Plan

Execution

• Task Monitoring
• Status Meetings
• Status Reports
• Communications to Stakeholders
• Go Live

Closure

• Lessons Learned
• Survey
• Final Report/Presentation
• Celebration
• Sign Off With Sponsor
THE PROJECT CHARTER

What type of information goes in a project charter? Why do we write one?
The Project Charter
Authorization + Planning + Expectations + Clarity

### I. Project Name

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>XX/XX/XX</td>
<td>XX/XX/XX</td>
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</tbody>
</table>

III. Project Details

**Project Description**

A clear description of the project is essential. What are you trying to accomplish? Why?

**Scope**

What is included or excluded? What is the expected timeline?

**Cost**

What is the cost of the project?

**Schedule**

What are the milestones and deadlines?
## II. Project Organization

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Frequency Options</th>
<th>Communication Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Manager</strong></td>
<td><strong>X</strong></td>
<td>Oversees the project work plan, reports on status, leads the project team that is responsible for achieving the project objectives.</td>
</tr>
<tr>
<td><strong>Steering Committee</strong></td>
<td><strong>Weekly</strong></td>
<td>Key people that assist the project manager in making decisions and moving the project forward.</td>
</tr>
<tr>
<td><strong>Sponsor</strong></td>
<td><strong>Weekly</strong></td>
<td>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project.</td>
</tr>
<tr>
<td><strong>Stakeholders</strong></td>
<td><strong>Monthly</strong></td>
<td>An individual, group, or organization that may affect or be affected by outcomes of the project.</td>
</tr>
<tr>
<td><strong>Project Team</strong></td>
<td><strong>Weekly</strong></td>
<td>Supports the project manager in performing work of the project to achieve its objectives.</td>
</tr>
<tr>
<td><strong>Others Involved</strong></td>
<td><strong>Weekly</strong></td>
<td>List anyone else who will be involved and state their roles.</td>
</tr>
</tbody>
</table>
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/whom will this 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
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 SDCCD schools and school districts
☐ #B3 Become the leader and model for innovation
☐ #B4 Maximize human and operational resources to strengthen the organizational culture of SDCCD

☐ #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.

<table>
<thead>
<tr>
<th>Phase/Major Milestone</th>
<th>Responsible (Lead)</th>
<th>Start Date or Month Begin</th>
<th>End Date or Month End</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<tr>
<td>2.</td>
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<tr>
<td>3.</td>
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<tr>
<td>4.</td>
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<td>5.</td>
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<td>6.</td>
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<td>10.</td>
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</tbody>
</table>
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.)?
EXECUTION PHASE CHECKLIST

All that project planning pays off when you are in Execution!
Can you identify the 10 key activities of the Execution Phase?

Click here for session handouts
# Key Activities of the Execution Phase

<table>
<thead>
<tr>
<th></th>
<th>Monitor progress, keep track of the calendar and milestones</th>
</tr>
</thead>
</table>
| 1 | Monitor the **project plan** frequently.  
Team members should update their status and add new tasks. |
| 2 | Check in with **team members** as needed.  
*Establish rapport with the team; make sure there are no roadblocks.* |
Key Activities of the Execution Phase

<table>
<thead>
<tr>
<th></th>
<th>Plan and conduct meetings, determine action items and assign next steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Lead <strong>status</strong> meetings.</td>
</tr>
<tr>
<td></td>
<td><em>Meeting duration and frequency will vary by project.</em></td>
</tr>
<tr>
<td>4</td>
<td>Lead <strong>standup</strong> meetings as needed.</td>
</tr>
</tbody>
</table>
|   | *These are typically short daily meetings (15 min).*
## Key Activities of the Execution Phase

<p>| | | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>5</td>
<td>![Plus]</td>
<td>Identify <strong>new</strong> activities or adjustments to the plan. <em>Watch out for scope creep (new scope added after the project starts).</em></td>
</tr>
<tr>
<td>6</td>
<td>![Exclamation]</td>
<td>Monitor <strong>risks</strong>. <em>Quickly address any risks.</em></td>
</tr>
<tr>
<td>7</td>
<td>![Dollar]</td>
<td>Monitor <strong>budget</strong>, if required. <em>Track project costs.</em></td>
</tr>
</tbody>
</table>
# Key Activities of the Execution Phase

<p>| | | |</p>
<table>
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<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>
| **8** | ![File Icon] | Prepare and send **status reports**.  
*Capture accomplishments, in progress, what’s next, and risks.* |
| **9** | ![Communication Icon] | Communicate **up** and **out** when needed.  
*Stay in touch with your sponsor, steering committee, and stakeholders.* |
### Go Live (Become operational)

<table>
<thead>
<tr>
<th>10</th>
<th>Prepare for <strong>Go Live</strong>.</th>
</tr>
</thead>
</table>

*Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.*
Take a look at the list...

Q: Which skills are essential to effectively lead/complete these key activities?
GO LIVE CHECKLIST

Get *everyone* ready for your launch!
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?**
Q: Which tool are you most excited to try?

PLANNING

EXECUTION

Click here for session handouts
Can you say ‘Yes’ to these?

**SESSION GOALS:**

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“I know the major phases of project management.”

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**03**
“I can refer to 2 checklists to help me **execute** my next project.”
# Project Management Toolkit

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

## RESOURCES

<table>
<thead>
<tr>
<th>Intro</th>
<th>Project Charter</th>
<th>Project Plan</th>
<th>Status Meetings &amp; Reports</th>
<th>Execution &amp; Go Live</th>
<th>Closure</th>
<th>More</th>
</tr>
</thead>
</table>

### Videos

- Welcome to Project Management

### Files

- Phases of a Project [PDF]
- How to Serve as a Project Team Member [PDF]
- Project Roles and Responsibilities [PDF]