Get Started with Project Management: “Starter Kit Session”
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
What’s going on in your IT shop?

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

For your past projects, at which phase or phases do you wish things went a little better?

PLANNING PHASE
EXECUTION PHASE
CLOSURE PHASE
MANAGING A PROJECT IS EASY.

It’s like riding a bike.
Except the bike is on fire.
You’re on fire.
Everything is on fire.
**Session Goals**

1. "I know the major **phases of project management**."

2. "I can use the SDCOE project charter template to **plan** my next project."

3. "I can refer to 3 checklists to help me **execute** and **close** my next project."
PM TOOLKIT

PLANNING

Project Charter DRAFT

EXECUTION

Project Management Phases

Key Activities of the Execution Phase

Go Live Checklist (Starting Point)

CLOSURE

Project Closeout Checklist

Support Team

Training & Communication

Are we ready? Is it a go?

Go / No Go Meeting

Go Live Checklist

Sign Off with Project Sponsor

Celebrate!

Hurray, you did it!
PROJECT MANAGEMENT PHASES

Planning, Execution, and Closure
The Project Charter may begin during Initiation.

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

Planning:
- Task Monitoring
- Status Meetings
- Status Reports
- Communications to Stakeholders
- Go Live

Execution:
- Lessons Learned
- Survey
- Final Report/Presentation
- Celebration
- Sign Off With Sponsor

Closure:

Project Management Phases

Monitoring & Controlling
THE PROJECT CHARTER

What type of information goes in a project charter? Why do we write one?
# Project Charter DRAFT

## I. Project Name

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
</table>

## II. Project Organization

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Communication Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>X</td>
</tr>
<tr>
<td>Steering Committee</td>
<td>Monthly, Bi-Weekly</td>
</tr>
<tr>
<td>Stakeholders</td>
<td>Monthly, As Needed</td>
</tr>
<tr>
<td>Project Team</td>
<td>Monthly, Bi-Weekly</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 are the project stakeholders? 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

## IV. Project Schedule & Milestones

<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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<td></td>
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<tr>
<td>2</td>
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<td>9</td>
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</tbody>
</table>
V. Tools

☐ Monday.com

If Yes, which board?

Do any new members need to be added?

☐ Microsoft Teams

If Yes, which team/channel will you use?

☐ OneDrive

If Yes, whose OneDrive, and what is the folder named?

☐ SharePoint Site

If Yes, which site, and what is the folder named?

☐ Other

VI. Other Items to Consider

- **Project Budget**: Estimate the cost of the project.
- **Communication Plan**: Identify all critical communication channels for project stakeholders, frequency of communication, types of information to be communicated, and method of regular communication.
- **Tracking and Status Updates**: Identify the methods the project team will use to regularly update the project status including methods of tracking project progress and which organizational stakeholders receive notification of project status.
- **Training Plan/Documentation Plan**: Identify any necessary training and documentation for project stakeholders, including content, delivery method, etc.
- **Project Close Out**: Determine the final actions/steps to close out the project. Examples include sign-off documentation, lessons learned meetings and documentation, surveys/evaluations, and a celebration and/or acknowledgement.
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.)?
View our Project Charter tutorial (6 min)
epmo.sdcoe.net
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?
## Key Activities of the Execution Phase

Monitor progress, keep track of the calendar and milestones

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</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

Plan and conduct meetings, determine action items and assign next steps

|   | Lead ___________ meetings.  
Meeting duration and frequency will vary by project. |
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>3</td>
<td><strong>status</strong></td>
</tr>
<tr>
<td>4</td>
<td>Lead ___________ meetings as needed.</td>
</tr>
<tr>
<td></td>
<td>These are typically short daily meetings (15 min).</td>
</tr>
</tbody>
</table>
## Key Activities of the Execution Phase

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

<table>
<thead>
<tr>
<th></th>
<th>Communicate the status of your project</th>
</tr>
</thead>
</table>
| 8 | Prepare and send **status reports**.  
  *Capture accomplishments, in progress, what’s next, and risks.* |
| 9 | Communicate **up** and **out** when needed.  
  *Stay in touch with your sponsor, steering committee, and stakeholders.* |
## Key Activities of the Execution Phase

<table>
<thead>
<tr>
<th>Go Live (Become operational)</th>
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<tbody>
<tr>
<td><strong>10</strong></td>
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<td></td>
</tr>
<tr>
<td>Key Project Management Activities During Execution</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
</tr>
<tr>
<td>Monitor progress, keep track of the calendar and milestones.</td>
</tr>
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<td><strong>1</strong></td>
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<td><strong>9</strong></td>
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<td></td>
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</tbody>
</table>

**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 SIS.

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

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

Q: What is usually your top area of focus before launch of a new technology?
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?
PROJECT CLOSEOUT CHECKLIST

Wrap up your project with success and provide closure for all parties.
Last school year we polled 26 district tech leaders across San Diego County...

<table>
<thead>
<tr>
<th>For your past projects, at which phase(s) do you wish things went better?</th>
<th>Count</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning Phase</td>
<td>2</td>
<td>8%</td>
</tr>
<tr>
<td>Execution Phase</td>
<td>4</td>
<td>15%</td>
</tr>
<tr>
<td>Closure Phase</td>
<td>12</td>
<td>46%</td>
</tr>
<tr>
<td>Planning Phase; Closure Phase</td>
<td>1</td>
<td>4%</td>
</tr>
<tr>
<td>Planning Phase; Execution Phase</td>
<td>1</td>
<td>4%</td>
</tr>
<tr>
<td>Planning Phase; Execution Phase; Closure Phase</td>
<td>6</td>
<td>23%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>26</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
# Project Closeout Checklist

Use this checklist to help you close out your project.

## 1. Lessons Learned
- **Identify and document lessons learned.**
  - Conduct a thorough postmortem process.
  - Gather feedback from all stakeholders.
  - Highlight important issues that will help improve the quality, workflow, speed of completion, cost-efficiency, and team synergy of the next project.
  - Use this information in your Final Presentation.

## 2. Survey
- **Assist the team with conducting a survey.**
  - Determine if the project objectives were met.
  - Measure satisfaction.
  - Use the results in your Final Presentation.

## 3. Final Presentation
- **Create a final report or presentation and use it to conduct a project closeout meeting.**
  - Create a final report/presentation that you can present to your project sponsor and steering committee.
  - Generally you will include a Project Overview, Survey Results, Lessons Learned, and What’s Left.
  - Present the final report prior to conducting your Celebration.

## 4. Celebration
- **A celebration and camaraderie can help energize everyone for the next project.**
  - Keep it short.
  - Make it fun.
  - Leverage pieces from your final report/presentation – not everyone remembers (or knows) all the details of the project, so don’t forget to include the project recap.
  - Ask your project sponsor to share a few words.

## 5. Archive
- **Archive project documentation.**
  - Archive relevant docs used in the project from start to finish. This includes project files, recorded meetings, and your Monday.com board.
  - When you sign off with your Project Sponsor, explain what was archived.

## 6. Other Closeout Items
- **Hand over project ownership, if necessary.** Transfer management of the completed project to the new owner.
- **Settle payments, if necessary.** Process outstanding invoices. Note down variances, cost efficiencies, and other financial information that will help you optimize the budget for the next project.
- **EPMO Only: Send the “How Did We Do?” Customer Satisfaction survey to the Project Sponsor and Project Team.**

## 7. Sign Off with Project Sponsor
- **Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.**

---

**Hooray, you did it!**
Lessons Learned

What worked well?

Where can we improve?

What are you proud of?

Documents  >  General  >  09. Lessons Learned

- Name
- Phase 1A - ITS Managers
- Phase 1B - ITS Classified Staff
- Phase 2 - SDCOE Managers
- Phase 3 - SDCOE Staff
Stakeholder Survey

We asked for feedback from employees after each deployment.

Comparison Chart

<table>
<thead>
<tr>
<th>Stakeholder Group</th>
<th>ITS Managers PHASE 1A</th>
<th>ITS Staff PHASE 1B</th>
<th>SDCOE Managers PHASE 2</th>
<th>SDCOE Staff PHASE 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree the methods are simple</td>
<td>75%</td>
<td>31%</td>
<td>73%</td>
<td>71%</td>
</tr>
<tr>
<td>Understand the importance of MFA</td>
<td>78%</td>
<td>58%</td>
<td>54%</td>
<td>32%</td>
</tr>
<tr>
<td>Agree the job aids are clear/easy to follow</td>
<td>100% agreement AVG 3.8</td>
<td>100% agreement AVG 3.8</td>
<td>100% agreement AVG 3.8</td>
<td>100% agreement AVG 3.8</td>
</tr>
<tr>
<td>Methods of support used</td>
<td>Printed job aid = 58%</td>
<td>Printed job aid = 80%</td>
<td>Printed job aid = 79%</td>
<td>Printed job aid = 78%</td>
</tr>
<tr>
<td></td>
<td>Electronic job aid = 41%</td>
<td>Electronic job aid = 20%</td>
<td>Electronic job aid = 44%</td>
<td>Electronic job aid = 28%</td>
</tr>
<tr>
<td></td>
<td>Asked a colleague = 21%</td>
<td>Asked a colleague = 36%</td>
<td>Asked a colleague = 28%</td>
<td>Asked a colleague = 28%</td>
</tr>
<tr>
<td></td>
<td>ServiceNow ticket = 20%</td>
<td>ServiceNow ticket = 16%</td>
<td>ServiceNow ticket = 31%</td>
<td>ServiceNow ticket = 31%</td>
</tr>
</tbody>
</table>

Agree questions and issues were answered in a timely manner | 100% agreement AVG 3.5 | 100% agreement AVG 3.6 | 87% agreement AVG 3.3 | 94% agreement AVG 3.3 |
Final Report

USE INFO FROM YOUR PROJECT CHARTER...

SUMMARIZE YOUR LESSONS LEARNED...

SUMMARIZE YOUR SURVEY FINDINGS...

SHARE WHAT'S LEFT
Celebration
# Project Closeout Checklist

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  - When you sign off with your Project Sponsor, explain what was archived.

## 6. Other Closeout Items
- Hand over project ownership, if necessary. Transfer management of the completed project to the new owner.
  - Submit final reports, if necessary. Process outstanding invoices. Note down variances, cost efficiencies, and other financial information that will help you optimize the budget for the next project.
  - EPMD Only: Send the “How Did We Do?” Customer Satisfaction survey to the Project Sponsor and Project Team.

## 7. Sign Off with Project Sponsor
- Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.

*Hooray, you did it!*
Q: Which tool are you most excited to try?
Can you say ‘Yes’ to these?

SESSION GOALS:

01
“I know the major phases of project management.”

02
“I can use the SDCOE project charter template to plan my next project.”

03
“I can refer to 3 checklists to help me execute and close my next project.”
Want more?

1. Workshops – Feb 3, Mar 2, Apr 18
2. Conference – June 22-23, 2023
3. Download templates and job aids and view our training videos
4. View samples in our portfolio

https://epmo.sdcoe.net
THANKS!

Enterprise Project Management Office

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EPMO@sdcoe.net