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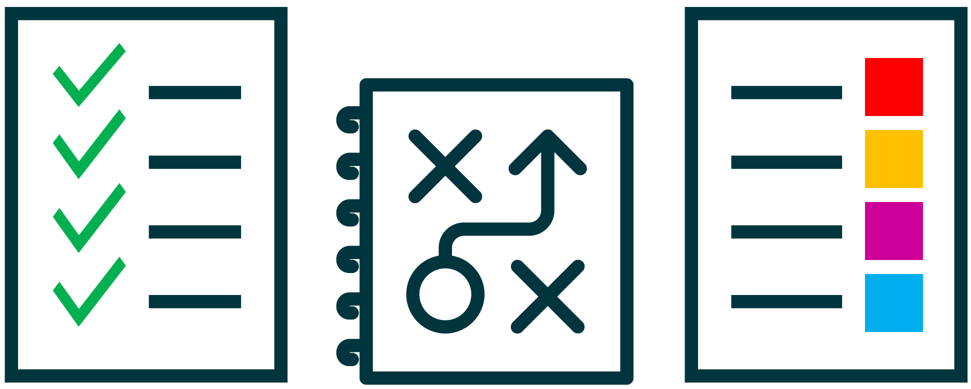


PROJECT MANAGEMENT TOOLKIT

Version 6.0

Templates and samples prepared by the
SDCOE Enterprise Project Management Office (EPMO)

https://epmo.sdcoe.net

PROJECT MANAGEMENT TOOLKIT CONTENTS

PROJECT MANAGEMENT TOOLKIT CONTENTS (CONTINUED)

Part 1:

OVERVIEW

1.1

Get Started

- About This Toolkit
- Project Management Phases: SDCOE's Recommended Approach
- Diagnostic Tool: How Much Project Management Do I Need for My Project?

ABOUT THIS TOOLKIT

Greetings from the San Diego County Office of Education

This Project Management Toolkit was prepared by the Enterprise Project Management Office (EPMO) at the San Diego County Office of Education (SDCOE). Whether you're leading your first project or managing multiple complex efforts, this toolkit is designed to support you. It is intended to be a practical, easy-to-navigate set of tools and techniques for planning, executing, and closing projects in K-12 Education.

What's Inside

Good project management isn't about paperwork, it's about selecting tools and techniques that will help you improve the quality and outcomes of your project. This toolkit includes guidance, templates, checklists, and examples to support every phase of a project. You'll find:

- **Step-by-step instructions** for starting, planning, executing, and closing projects
- **Practical tools, templates, and samples** to manage people, timelines, communication, change, and more
- **Tips and best practices** to help you avoid common pitfalls
- **AI support**, including prompt ideas and use cases to boost your productivity
- Use the **Diagnostic Tool** to determine how much project management your project needs and where to begin

How to Use This Toolkit

- **Use it as a reference.** Jump to the specific section you need using the table of contents.
- **Use it as a starter guide.** Follow the recommended SDCOE project phases.
- **Use it as a coaching tool.** Share it with your team to build shared understanding.

Additional Resources Available on Our Website

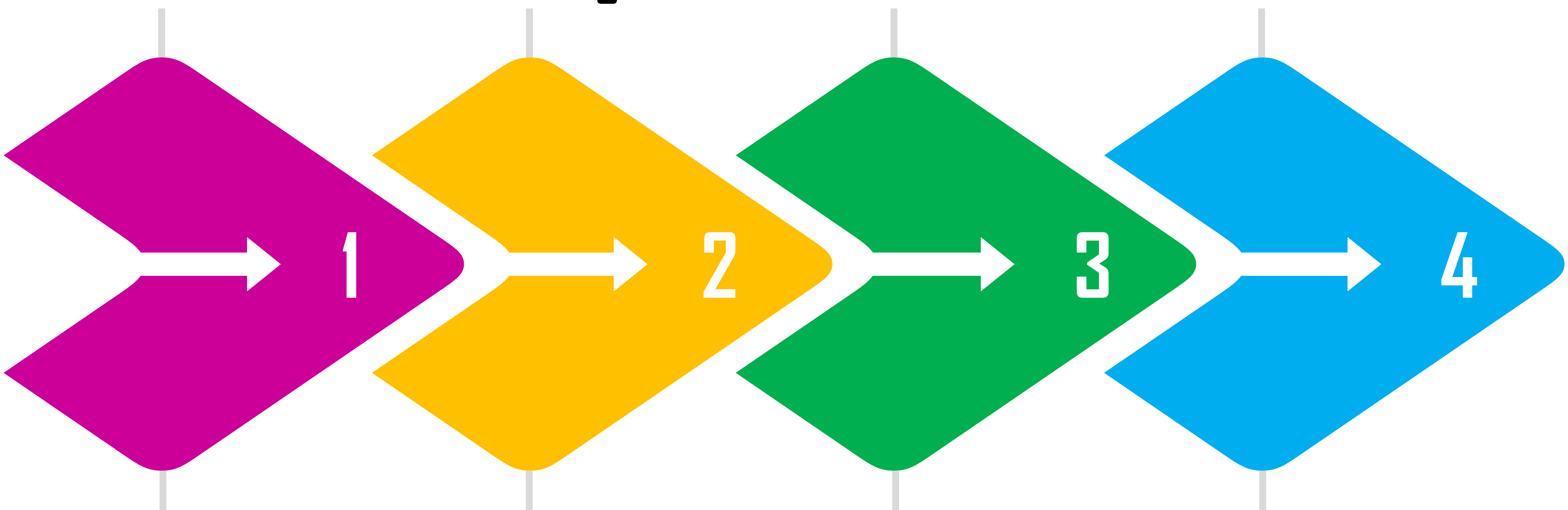
Additional resources, including video tutorials, customizable templates, project samples, recorded trainings, and an electronic version of this toolkit, are available at **epmo.sdcoe.net**.

Here's to projects that make a difference, and our teams that make it happen!

With Appreciation, The SDCOE EPMO Team

Project Management Phases

Monitoring & Controlling



Initiation

The Project Charter
may begin
during Initiation

Planning

- Project Charter
- File Repository
- Project Plan (PM software or Excel)
- Kickoff Meeting
- Stakeholder Engagement Plan

Execution

- Monitor Project Plan
- Status Meetings
- Standup Meetings
- Status Reports
- Engage Stakeholders
- Go Live

Closure

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

Prepared by San Diego
County Office of Education
ENTERPRISE PROJECT MANAGEMENT OFFICE (EPMO)

Revised September 2023

PROJECT MANAGEMENT DIAGNOSTIC TOOL

How much project management do I need for my project?

This is a diagnostic tool created by the San Diego County Office of Education to help you right-size project management for your project. At Step 1, you will consider 7 questions to determine how much project management you need (none, lightweight, moderate, or full). Step 2 is intended to help you identify which specific project management tools and techniques you deem are required. Remember, project management should be something that adds value, makes the work easier (more efficient, better organized, better communicated, etc.), and helps you have successful outcomes.

Step 1: Project Snapshot (Y/N Questions)

Directions: Answer these Yes/No questions about your project.

	YES	NO
1. Is the project longer than 6 weeks in duration?		
2. Is there a hard due date or high risk if delayed?		
3. Will the project impact a large number of staff or stakeholders?		
4. Does the project have high visibility or high stakes?		
5. Is there significant training or organizational change management needed?		
6. Is this project cross-departmental or multi-team?		
7. Does the project involve external vendors, contracts, or purchases?		

- **If all answers are NO**, your project may only need *basic coordination*. It's likely you can get by with your day-to-day tools like Outlook/Google calendar, email and chat messages, and Word/Google Docs to manage the project.
- **If you answer YES to 1-2**, you may only need *lightweight project management*. Go to Step 2 to consider which specific tools and techniques will help you.
- **If you answer YES to 3+**, your project probably has higher complexity or risk, and you likely need *moderate to full project management*. Go to Step 2 to consider which specific tools and techniques will help you.

Step 2: What Tools & Techniques Will I Require?

Directions: Use this chart to decide which project management tools and techniques you deem are required, nice to have, or not needed, based on the complexity and risk of your project.

PM Tools & Techniques	**Likely required if...**	Not Needed **NO**	Nice to Have **MAYBE**	Required **YES**
1. Project Charter	If you need clarity on project goals, scope, deliverables, who's involved, risks, and timeline/milestone dates NOTE: A "lite" project charter is available (1 page)		☐ Full ☐ "Lite"	☐ Full ☐ "Lite"
2. Project Schedule or Calendar	If visualizing the schedule is helpful, either as a list or in calendar view			
3. Project Plan (PM software or Excel)	If there are multiple phases, tasks, and/or team members responsible; if it will help you monitor and track the project			
4. Kickoff Meeting	If communicating the vision and "who, what, where, when, why, and how" of your project is beneficial; if team members are from different groups			
5. File Repository	Always useful for any size project			
6. Stakeholder / Communication Plan	If the project impacts others, especially if organizational change is involved			
7. Status Meetings	If the project runs more than 6 weeks (as a guideline) or includes multiple contributors			
8. Standup Meetings	If short, daily planning meetings are helpful during your project (examples: Development or Testing)			
9. Status Reports	If the Sponsor and others will benefit from a weekly, bi-weekly, or monthly report			
10. Training Plan	If staff or users need new skills or knowledge to use what's delivered			
11. Support Plan	If support staff will be involved or if staff/users will need ongoing support			
12. Go Live Plan	If you are launching (or changing) a system, tool, or process			
13. Lessons Learned Documentation	If there is value in repeating or avoiding what happened next time; if it will support continuous improvement			
14. Stakeholder Survey	If stakeholder or user feedback is important to improve or assess success			
15. Final Report / Presentation	If reporting out, documenting the project, or demonstrating value is needed			
16. Celebration	Always good morale booster, especially when impact/outcomes are shared with the project team; if providing closure for the team is helpful			
17. Archive	If artifacts need to be reused or referenced in the future			
18. Sponsor Sign-off	If formal approval is needed to close the project or mark success			

1.2

Introduction to Project Management

- Project Management 101
- How to Serve as a Project Team Member

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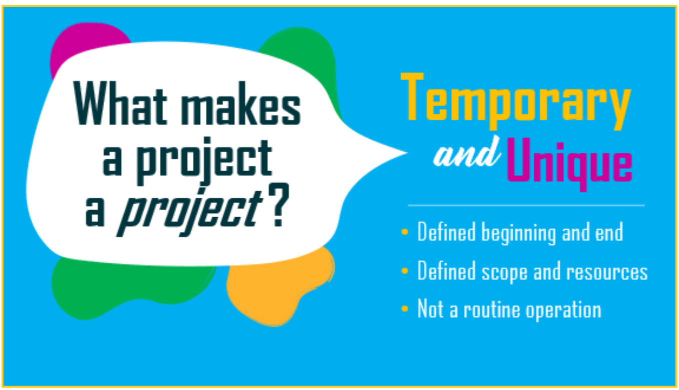
PROJECT MANAGEMENT 101

1. Definition of a 'Project'

What makes a project a project?



We're often asked...what exactly makes a project a project? Consider two words: ***temporary*** and ***unique***.

According to Project Management Institute, or PMI, "a project is a **temporary** endeavor undertaken to create a **unique** product, service or result."

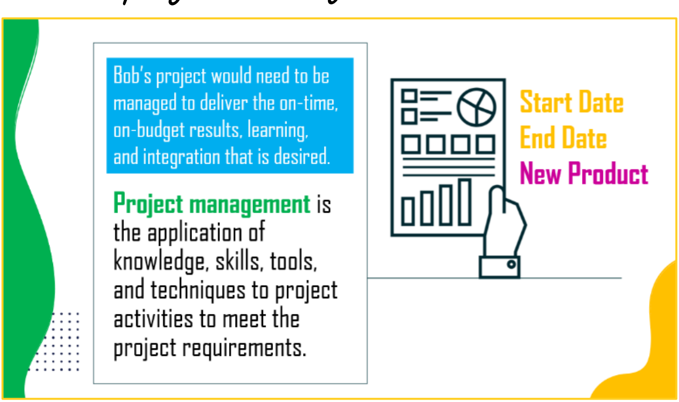
It has a **defined beginning** and **end** in time, and therefore **defined scope and resources**. A project is unique in that it is **not a routine operation**.

NOT A PROJECT - When Bob runs a report on the last day of every month, that *wouldn't* be considered a project because it is simply a routine operation, part of Bob's job.

YES, IT'S A PROJECT - But let's say that Bob's team needs a new way to do its monthly reporting, including a new report and a new reporting procedure...this *is* a project because it has a start and end date, and a new product would be created.

2. Definition of 'Project Management'

What is project management?

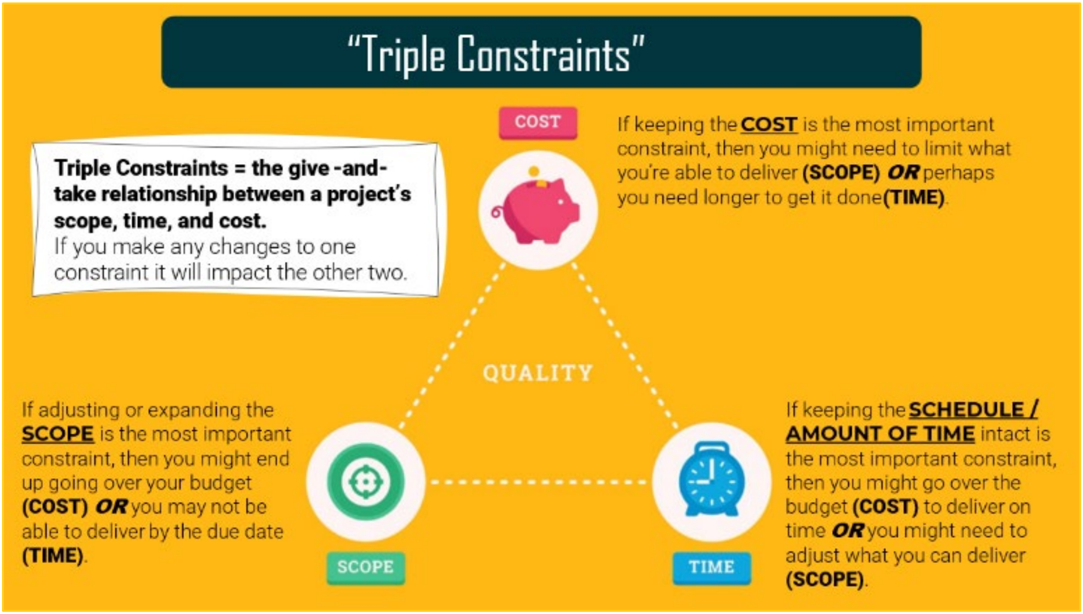


Project management is the application of ***knowledge***, ***skills***, ***tools***, and ***techniques*** to project activities to meet the project requirements. You get to choose how much project management you need to ensure that your project:

- Meets the intended **scope**
- Is delivered **on time**
- Stays within **budget**
- Is integrated/adopted

3. The Triple Constraints of a Project

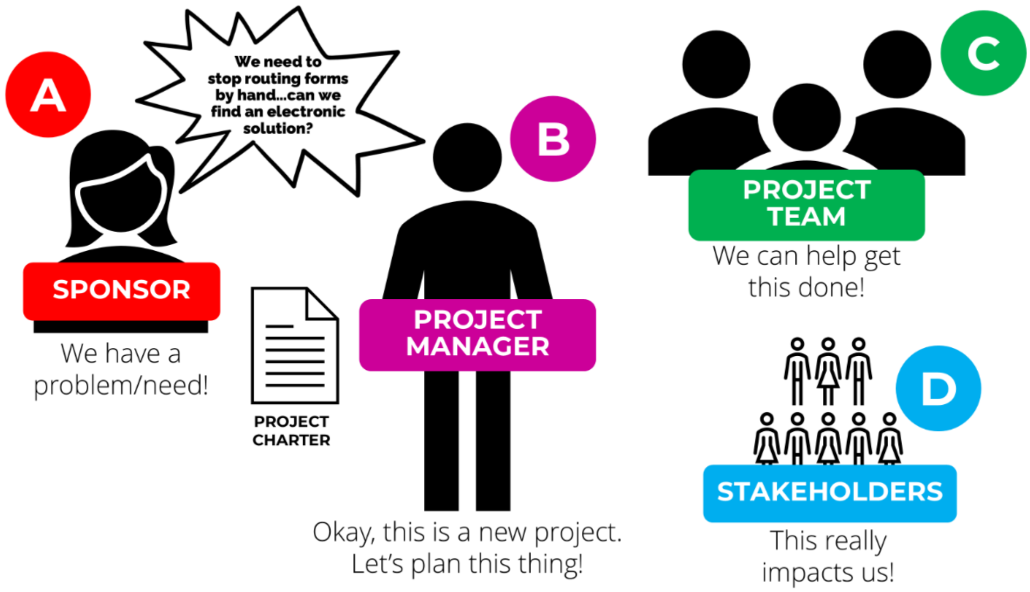
If we run into issues, what's more important…delivering on time, staying within budget, or delivering everything we originally planned?



- **Triple Constraints** = The give-and-take relationship between a project's **scope**, **time**, and **cost**. If you make any changes to one constraint, it will impact the other two.
- The triple constraints are depicted by a triangle with **QUALITY** in the center, and **SCOPE**, **TIME**, and **COST** the three points of the triangle. Scope, time, and cost affect the quality of your project.
- What if we need to make a change to scope, time, or cost? Imagine the triangle is made from a rubber band. If you "pull" on one corner, the other corners are likely impacted. If one constraint is pulled too tightly without adjusting the others, quality may suffer.
  - **"We need to expand the scope."** If adjusting or expanding the **SCOPE** is the most important constraint, then you might end up going over your budget (COST) *OR* you may not be able to deliver by the due date (TIME).
  - **"We need to make the project due date."** If keeping the **SCHEDULE / AMOUNT OF TIME** intact is the most important constraint, then you might go over the budget (COST) to deliver on time *OR* you might need to adjust/reduce what you can deliver (SCOPE).
  - **"We need to stick to our budget."** If keeping the **COST** is the most important constraint, then you might need to limit what you're able to deliver (SCOPE) *OR* perhaps you need longer to get it done (TIME).
  - **Analogy:** Think of planning a dinner party. If you want to cook a fancy meal (scope), but you only have $100 (cost), and guests are arriving in 2 hours (time), something's got to give. You may need to cook a simpler meal, ask guests to bring a dish, increase your budget to order takeout, and/or delay the start time.
- One of the first steps in managing a project well is understanding which constraint is the highest priority. What can't change? What's flexible?
- Changes to the Triple Constraints aren't inherently bad, just be aware that they may require adjustments to the other factors to ensure project success. This illustrates the importance of communicating with the project sponsor to be clear about what's most important and to help manage expectations.

4. Roles & Responsibilities

Who's on a project?



A. SPONSOR. The Sponsor is accountable for the project's success, provides funding and direction, and helps remove roadblocks. The Sponsor champions the project and cares about it the most.

For a large or complex project, the sponsor could be separated into two distinct roles: The **Executive Sponsor** who champions the project at the highest level and provides strategic guidance, and the **Project Sponsor** who manages business decisions and works closely with the Project Manager.

B. PROJECT MANAGER. The Project Manager is responsible for planning, coordinating, and delivering the project on time, within scope, and on budget. The Project Manager leads the day-to-day work, communicates with stakeholders and the Sponsor, manages risks and issues, and ensures the team stays aligned with the project's goals. Core attributes: Organization, communication, people skills, leadership (inspires, guides, builds trust, sees the bigger picture), problem-solving, adaptability, time management, collaborative. Remember that a Project Manager generally should not be assigned tasks that are performed by the Project Team Members.

At the San Diego County Office of Education, the Project Manager role is only assigned to a person in a management position. The role of Project Lead (see below) may be assigned to management and non-management positions.

C. PROJECT TEAM. The Project Team are the staff who perform the work of the project, support the Project Manager in achieving project objectives, and escalate issues as needed. Team members are typically responsible for completing tasks within their area of expertise (**subject matter experts, or SMEs**).

Some projects might benefit from a **Project Lead**, a project team member responsible for coordinating specific project activities and deliverables. The Project Lead might collaborate with the Project Manager on planning; coordinate efforts like documentation, testing, and training; and/or ensure specific parts of the project stay on track.

D. STAKEHOLDERS. The Stakeholders are individuals, groups, or organizations affected by or have an interest in the outcome of the project. Stakeholders might provide input and source information, contribute business knowledge, and/or participate in activities like User Acceptance Testing (UAT) to ensure the project meets user needs.

"Stakeholders" is a Project Management Institute (PMI) term. Other words to describe this audience include **Interested Parties**, **Customers**, and **End Users**.

4. Roles & Responsibilities (Cont'd)

Other roles on a project:

- **TRAINING & SUPPORT.** Team members responsible for preparing end users for successful adoption of the project. They contribute to planning and delivering training, developing support materials, and ensuring users have the resources needed before and after implementation. Their early involvement helps ensure a smooth transition and long-term success.

- **STEERING COMMITTEE.** Some projects might benefit from a Steering Committee, a group of stakeholders who provide guidance, support, and decision-making authority to help move the project forward. The Project Manager consults with them as needed, especially when a decision needs to be made or input is needed from those who represent broader stakeholder interests.

- **CHAMPIONS.** Some projects might benefit from Champions, a group of early-adopter stakeholders who actively support the project by promoting its benefits, identifying potential issues, and helping others navigate change. Champions serve as liaisons between the project team and their departments, answer questions, share feedback, and encourage user engagement to support successful adoption.

Comments:

- The terms *Sponsor*, *Project Manager*, *Project Lead*, and others refer to project roles, not official job titles. One person may take on multiple roles depending on the size and complexity of the project, and someone's day-to-day job title might differ from the role they play on a project. These roles help define responsibilities so everyone knows how they contribute to the project's success.

- Not all projects require all roles! To help you decide, look at your project's scope, time, and cost (the Triple Constraints) as factors to determine how much project management you might need.

5. Common Project Events & Milestones

What does a typical project look like?

LIST OF POTENTIAL THINGS TO MANAGE / DO FOR YOUR PROJECT

EXECUTION PHASE

- Research/Discovery
- Purchasing
- Receiving
- Configuration / Design / Build / Customization
- Testing
- Training
- Go Live Prep
- Go Live / Implementation
- Support / Operationalize

CLOSURE PHASE

- Lessons Learned
- Survey
- Final Report
- Celebration
- Archive
- Sign-off with Sponsor

It is helpful to consider in advance what you will need to manage/do for your project. This is a list of **common project events and milestones**. Some represent entire phases of work (like Purchasing or Testing), while others are specific events that signal key progress points (like Go Live or Celebration).

Please note that not all projects have these events, and some projects might have different events.

6. Common Ways to Manage a Project

Waterfall, Agile, Kanban, Scrum

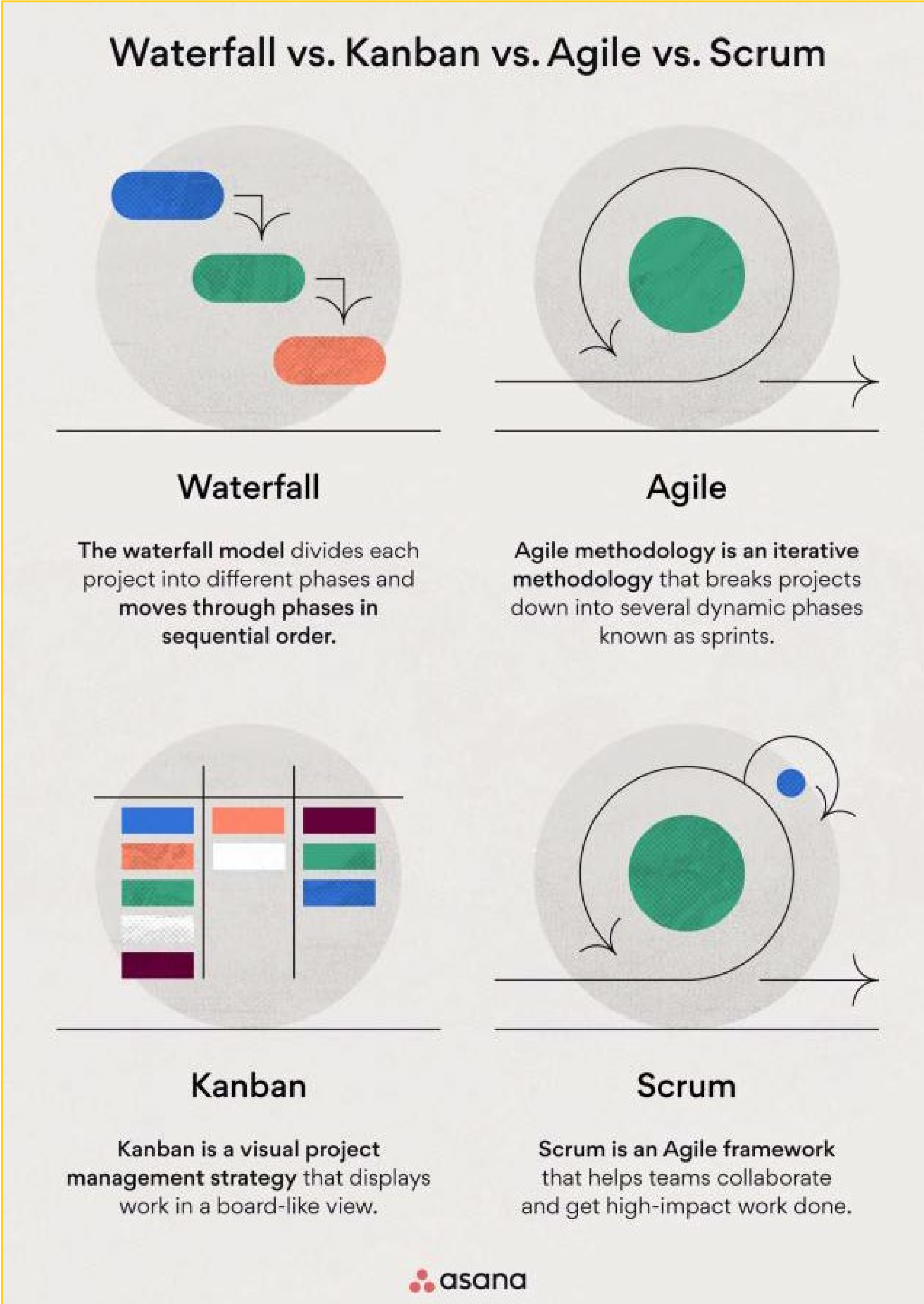


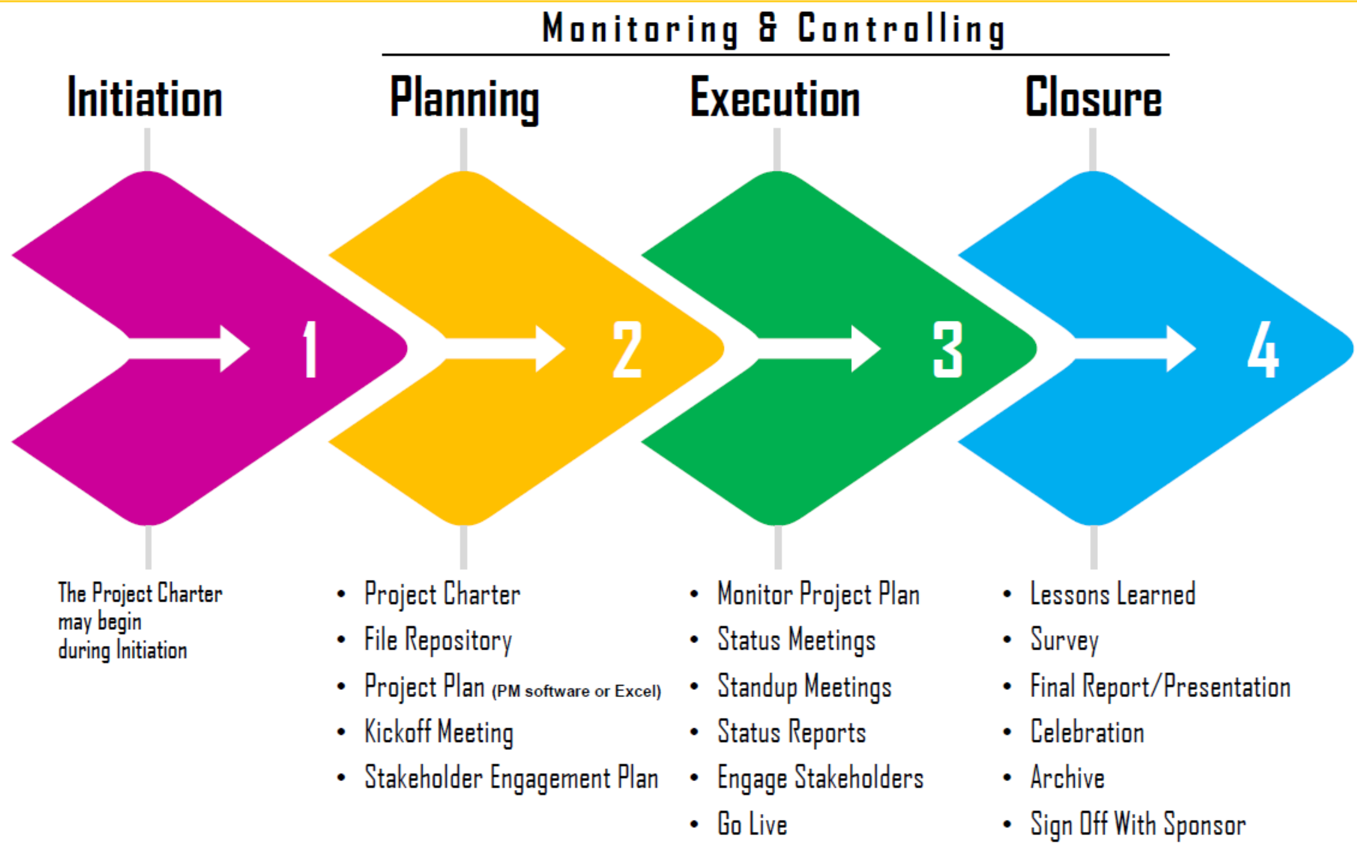
Image source: Asana

There are several ways to manage a project. Traditional methods like **Waterfall** offer structure and predictability, while **Agile** methods prioritize flexibility and fast feedback. Blended models, like *WaterAgileFall* (or *Wagile*) and *Scrumban*, combine the strengths of different approaches. For example, at the San Diego County Office of Education, a project might be mostly Waterfall but includes some Agile elements, like incorporating two-week sprints and standup meetings during the testing phase. What's most important is that you choose an approach that best fits your project needs and adds value.

7. SDCOE's Recommended Approach

Initiation > Planning > Execution > Closure

The Enterprise Project Management Office (EPMO) at the San Diego County Office of Education (SDCOE) developed this streamlined approach to project management, based on Project Management Institute's (PMI) principles.



The four phases of project management are **Initiation**, **Planning**, **Execution**, and **Closure**. **Monitoring and Controlling** occurs throughout.

- **Initiation** is when you are just starting out and exploring whether you will pursue a project.
- **Planning** is a critical part of the process. In our workflow at SDCOE, we typically are working on our Project Charter at the onset of Planning, although it may begin during Initiation. The Project Charter forms the backbone of your project. You use it to get clarity on what the project is and to document as much as you can BEFORE THE WORK BEGINS. Notice the other key activities in this phase: Setting up a file repository, defining/organizing the work to create a project plan, conducting a kickoff meeting, identifying stakeholders and starting a plan to engage with them.
- Your project hits **Execution** when the work begins by the project team. At this point, it becomes important to monitor the tasks, as well as stay connected with the project team. You plan Status Meetings, write and send a Status Reports, and you ensure updates and information are provided to the stakeholders. Lots of activity happens during the Execution Phase, leading up to Go Live. During Execution, build in time for post-implementation support and issues resolution.
- Your project does not end on the day of Go Live. The **Closure** phase is an important bookend to the project. Essentially you do a Lessons Learned Meeting to find out what went well, what can be improved, and focus on continuous improvement. Surveys help us determine if we met our project goals and objectives. This feeds into a final report or presentation for the Sponsor, your Board, or anyone who would benefit from the report. Then a project celebration lets every team member know how they did and share in the success, as well as get invigorated for the next project. Finally, files get archived and all hand-offs are completed, including a sign off with the Project Sponsor.

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HOW TO SERVE AS A PROJECT TEAM MEMBER

Project Roles

Here is a list of common project roles. A small project might have fewer roles while a larger project might include all of these, and more.

- Project Sponsor
- Project Manager
- Project Team Member – *for a large project there may be a Core Team and Extended Teams*
- Project Lead – *a Project Team Member responsible for coordinating specific project activities and deliverables; works closely with the Project Manager*
- Stakeholders / End Users

Kickoff Meeting

The Kickoff Meeting occurs at the beginning of the project and is intended for ANYONE who will be involved in the project.

Attend the meeting and listen for the following:

- **Why** - What problem are we trying to solve or what new thing are we creating, and why? For whom? What is the justification? What are the objectives and success criteria?
- **Who** - Which teams and people are involved, and what are their roles? What is YOUR role?
- **When** - What is the schedule? Are there multiple phases? When is go live?
- **How** - How are we all going to work together? What are the expectations? How will everyone communicate and collaborate?
- **Tools** - Where are files stored? Where is the project plan located and how will it be set up?

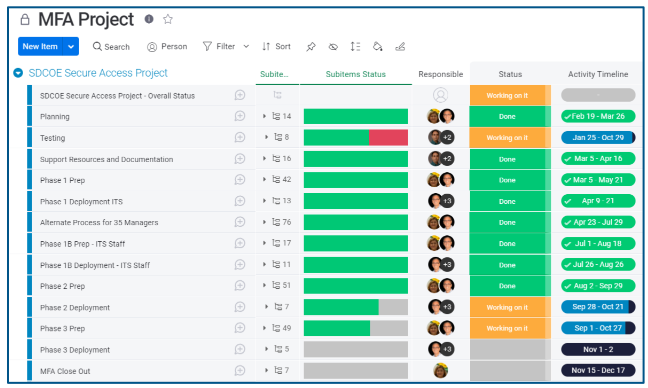
File Repository

The Project Manager or Project Lead should set up a location to store shared project files. Examples: SharePoint, OneDrive, Google Drive

- Be sure you have access to the files
- Review the folder structure
- Know how and where to upload new files

Complete Tasks (Project Plan)

The Project Manager should set up a project plan to manage all the tasks associated with the project. Examples: Project Management software, a shared Excel file, Google Sheets



MFA Project

New Item Search Person Filter Sort

SDCOE Secure Access Project

	Subite...	Subitems Status	Responsible	Status	Activity Timeline
SDCOE Secure Access Project - Overall Status				Working on it	-
Planning	14			Done	Feb 19 - Mar 26
Testing	8		+2	Working on it	Jan 25 - Oct 29
Support Resources and Documentation	16		+2	Done	Mar 5 - Apr 16
Phase 1 Prep	42			Done	Mar 5 - May 21
Phase 1 Deployment ITS	13		+3	Done	Apr 9 - 21
Alternate Process for 35 Managers	76			Done	Apr 23 - Jul 29
Phase 1B Prep - ITS Staff	17			Done	Jul 1 - Aug 18
Phase 1B Deployment - ITS Staff	11		+3	Done	Jul 26 - Aug 26
Phase 2 Prep	51			Done	Aug 2 - Sep 29
Phase 2 Deployment	7		+3	Working on it	Sep 28 - Oct 21
Phase 3 Prep	49			Working on it	Sep 1 - Oct 27
Phase 3 Deployment	5		+3		Nov 1 - 2
MFA Close Out	7				Nov 15 - Dec 17

- You are responsible for viewing your tasks and knowing your due dates
- Be committed to the project – work toward the goals of this project and successfully complete your tasks on time
- If using project management software: Regularly enter your updates; add your own new/unforeseen tasks (if your business process allows for this)
- Keep your Supervisor informed about your role and involvement, especially if you find that the project is impacting your daily work

Engage with Project Manager

The Project Manager or Project Lead is your go-to person to help give you perspective on the project, your role and tasks, where the project is at and where it's going.

- Do not assume the Project Manager knows every detail – if you are aware of a risk to the project, make the Project Manager aware as soon as possible
- You may share concerns about the project with the Project Manager and expect that it will be addressed and handled tactfully

Status Meetings

A status meeting is used to discuss new information, provide updates, talk about risks/challenges and solutions, see demos, etc. The meeting duration and frequency will vary by project. Example: Weekly 1-hour meetings

- Review the agenda in advance and add any necessary items
- Be prepared to speak on any agenda items for which you are responsible and provide an accurate status
- Be an active participant at status meetings – ask questions, provide input

Standup Meetings (if scheduled)

A standup meeting is typically a short daily meeting for planning. The format allows everyone to hear the current progress of every team member to address any roadblocks. Example: Daily 15-min meetings

- Be prepared to succinctly state what you've done since yesterday, what you're working on today, and if there are any roadblocks

Status Reports

With the assistance of the core team, the Project Manager or Project Lead will prepare status reports to share with the entire project team.

- If your team uses project management software or an Excel spreadsheet to manage the project plan, make sure you have updated your items before the status report is created
- If you are on the core team, provide input
- When you receive a status report, read it to be aware of the accomplishments, what's in progress, next steps, and any identified risks

Go Live

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

- If you have concerns about going live, make sure you tell the Project Manager or Project Lead
- Examples: Testing issues, training needs, communications, undefined support procedures, unclear changes to business process

Lessons Learned Meeting

The Lessons Learned Meeting is to reflect on the project (or a phase of the project) to identify how to make improvements for next time. It is meant to be a safe space where all feedback is accepted.

- Come to the meeting having thought about: What worked well? Where can we improve? What about the project are you proud of?

Celebration

A Celebration officially closes the project. It is a time for team members to hear about the success of the project and to provide closure.

- Attend the Celebration
- Listen for a high-level recap of the project
- Share kudos and praise with your project team
- Be proud of what you have contributed!

SDCOE EPMO Website

The SDCOE Enterprise Project Management Office offers several resources to help you and your team with Project Planning, Execution, and Closure.

- https://epmo.sdcoe.net

1.3
AI in Projects

- Use Cases for AI in Projects
- Sample AI Prompts for Your Project

USE CASES FOR AI IN PROJECTS

AI tools like ChatGPT, Copilot, and Gemini can support every stage of a project, from the first planning meeting to the final report. While it won't manage your project for you, it can speed up your work, strengthen your documentation, and help you generate ideas when you're stuck.

The Enterprise Project Management Office at SDCOE has identified three use cases for AI in projects:

- **Use AI to help you get started.** Use AI to break through inertia and get moving. It's especially helpful when you're working on a deliverable you've never created before or when you're short on time and just need a rough draft.
- **Use AI to review your work.** AI can act as a second set of eyes, helping you spot what you may have overlooked. This is useful for surfacing risks, identifying gaps, or improving how you communicate with different audiences.
- **Use AI to spark creativity.** AI excels at brainstorming and generating new ideas, especially when you're preparing presentations, events, or communications and need a creative boost.

Ways AI can support you with your project

	Help You Get Started	Review Your Work	Spark Creativity
How you can use AI for your project	• Draft project charters, scopes, and communication plans • Generate task lists or project plans based on your goals and constraints • Write user acceptance testing (UAT) plans and stakeholder surveys • Draft timelines, checklists, and meeting agendas • Summarize background information into clear, concise context	• Identify vague or missing pieces in a scope statement or timeline • Reword status updates for non-technical stakeholders • Review a stakeholder list to suggest who might be missing • Point out jargon or unclear language • Suggest risks, dependencies, or constraints you may not have considered	• Brainstorm names, taglines, or themes for your project • Develop ideas for kickoff or celebration events • Create engaging language for stakeholder communications • Generate metaphors, analogies, or visual ideas for presentations • Invent personas or scenarios for training and planning exercises
Example	*"Write a project charter for upgrading classroom displays at 40 school sites. The project should focus on ease of use for teachers, minimal classroom disruption, and long-term sustainability."*	*"Here is my project charter and project plan. What might be missing?"*	*"Create a fun thirty-minute celebration that would be appropriate to close out this project. Include creative ways to recognize team members and their contributions."*
Tip	Ask AI to "ask clarifying questions before answering." It helps you think through what's missing.	Pair AI review with your own. Don't treat its output as definitive; use it to challenge your assumptions.	If the first answer feels generic, ask for five alternatives with different tones or styles. Creativity improves with follow-up prompts.

Use AI Responsibly

AI is helpful, but not infallible. It may generate incorrect or outdated information, especially when dealing with technical specifics or local policies.

- Review its suggestions carefully
- Avoid inputting sensitive or confidential data

> 🔒 **PRIVACY TIP:**
> Always assume your input could be stored or reviewed. If you wouldn't post it on a public website, don't enter it into an AI tool.

- Double-check facts such as dates, times, quantities, etc.
- Treat the output as a starting point, not a finished product

SAMPLE AI PROMPTS FOR YOUR PROJECT

Try these sample AI prompts to support you with your project. Tailor and refine them to best meet your needs.

1. Project Charter & Scope

- "Create a one-paragraph summary of a project that replaced on-prem servers with Azure AD." *(Help You Get Started)*
- "Take this project scope and identify anything that sounds vague or needs clarification." *(Review Your Work)*
- "Review this scope statement. What questions might the steering committee ask?" *(Review Your Work)*
- "Suggest fun, professional names for a district-wide upgrade initiative." *(Spark Creativity)*
- "Reword this paragraph to make it clearer and easier to read." *(Review Your Work)*

2. Project Planning & Timeline

- "Here's my project charter. Help me create a project plan with due dates and dependencies. Do not assume anything and ask me questions to clarify as needed." *(Help You Get Started)*
- "Are there any missing steps in this draft project timeline for upgrading school Wi-Fi?" *(Review Your Work)*
- "Here is my project charter and project plan. What might be missing?" *(Review Your Work)*

3. Project Kickoff

- "Using the attached PowerPoint template, create a kickoff meeting presentation for a new project. The project charter is also attached." *(Help You Get Started)*
- "Draft a friendly and professional email to school principals explaining that we are launching a new technology upgrade project and invite them to a kickoff meeting." *(Help You Get Started)*

4. Risks

- "List 10 risks for a project involving a student data system integration. Include probability and impact." *(Help You Get Started)*

5. Cost & Procurement

- "Here's a quote for a system. Calculate the TCO for this product over ten years. Explain your math." *(Review Your Work)*

6. Stakeholder Engagement

- "Here's a stakeholder list. Who might be missing?" *(Review Your Work)*
- "Here's my project description. [Paste it in.] The stakeholders for my project are [describe them]. Besides email communications to tell them about the project and what to expect, what are some other strategies to engage with the stakeholders so they are excited about and ready for the change?" *(Help You Get Started)*
- "Come up with sticker or poster slogans for an IT department campaign promoting a new project." *(Spark Creativity)*

7. Testing

- "Create a user acceptance testing (UAT) plan for this software project." *(Help You Get Started)*
- "Here are all the things we need to test for our project. Create a testing schedule that outlines which items we should complete each day, for 10 business days. Build in time for re-testing issues." *(Help You Get Started)*

8. Go Live / Implementation

- "Here's a list of tasks for our upcoming go live. What's missing?" *(Review Your Work)*

9. Stakeholder Survey

- "Create a 4-7 question survey to gauge stakeholder satisfaction at the end of this project. The survey should evaluate how well we've met the goals listed in the attached project charter." *(Help You Get Started)*
- "Take all of these comments from a stakeholder survey and help me identify themes. [Paste in comments.]" *(Help You Get Started)*

10. Final Report & Closeout

- "Write a 2-page final report for this project. Attached is the project charter, lessons learned report, stakeholder survey results, and all status reports." *(Help You Get Started)*

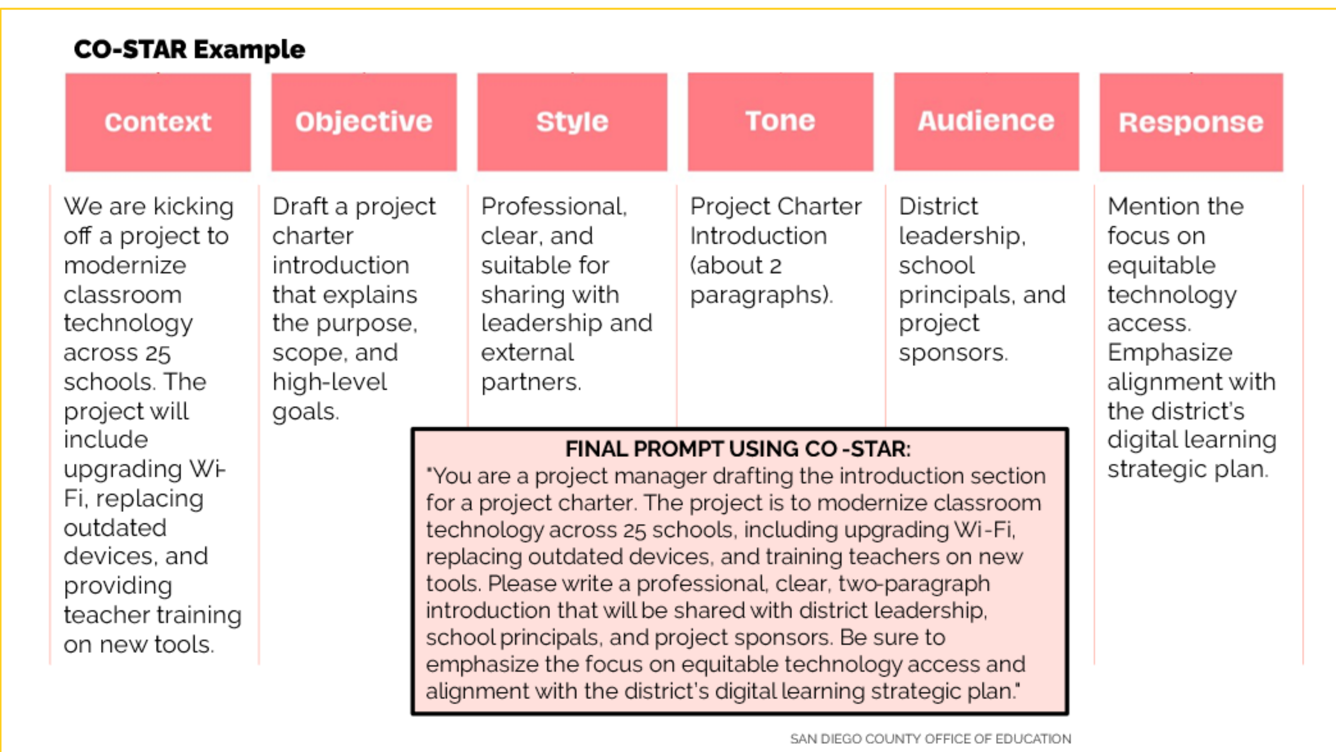
11. Project Celebration

- "Here's my project description. [Paste it in.] Create a fun thirty-minute celebration that would be appropriate to close out this project. Include creative ways to recognize team members and their contributions." *(Spark Creativity)*

Construct your own prompts!

Use CO-STAR to write effective prompts

The way you frame your question matters. A clear, specific prompt helps AI provide a useful response. Use the CO-STAR framework to shape your request. CO-STAR stands for *Context*, *Objective*, *Style*, *Tone*, *Audience*, and *Response*.



Part 2:

PLAN YOUR PROJECT

2.1

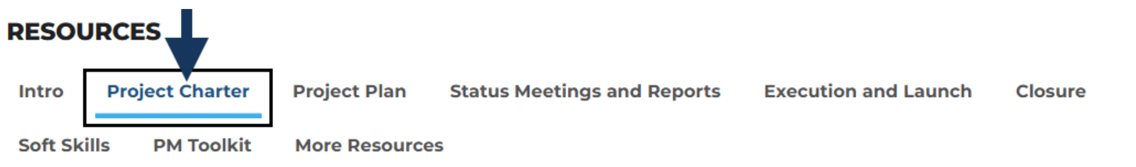
Project Charter

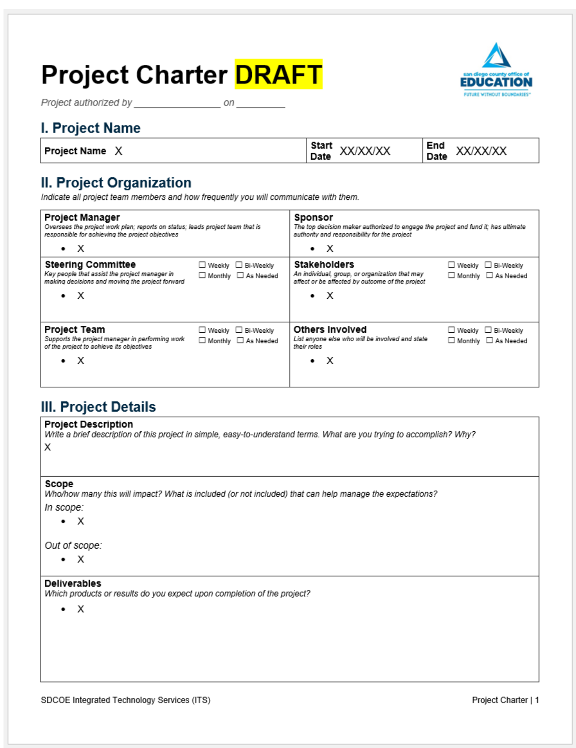
- Project Charter Guidance
- Project Charter Template
- Project Charter “Lite” Template (One Page)
- Samples

PROJECT CHARTER GUIDANCE

Download the Project Charter template.

- Go to https://epmo.sdcoe.net
- Scroll down to **Resources > Project Charter**. Download the Project Charter template. It is a Word document.





Project Charter DRAFT

Project authorized by _______________ on _________

I. Project Name

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

II. Project Organization

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

Project Manager *Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives* • X	**Sponsor** *The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project* • X
Steering Committee ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *Key people that assist the project manager in making decisions and moving the project forward* • X	**Stakeholders** ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *An individual, group, or organization that may affect or be affected by outcome of the project* • X
Project Team ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *Supports the project manager in performing work of the project to achieve its objectives* • X	**Others Involved** ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *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 *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

SDCOE Integrated Technology Services (ITS) Project Charter | 1

Feel free to make the template your own.

- Remove the **SDCOE logo** and replace it with your own
- Remove the **SDCOE footer** and replace it with your own
- For any parts of the template that are SDCOE-specific, remove/edit them

Tips:

- Prepare your project charter before the project work begins – this is your planning document
- Involve as many people as you can in the process of creating your charter
- It might take several working sessions to prepare the project charter.
- View a short tutorial: Project Charter Tips

How to Prepare a Project Charter

Part I: Project Name

- Write the official name of the project, the start date, and end date. Remember, what makes a project a project is that it has a start and *end* date!
- You might not know the end date when you first start writing your project charter. If necessary, leave it blank until you work through Part IV: Project Schedule & Milestones.
- Establish a realistic timeframe.

Part II: Project Organization

- If you look at the top of each box there is a short description of each role.
- List *anyone* who will be involved in the project. Are there departments outside of yours to consider? School staff? External/vendors?

Part III: Project Details

- **Project Description:** Write a description of the project in simple, easy-to-understand terms. This is where you want to put "the why." Include a little bit of backstory for context and what the desired outcome is. Avoid acronyms.
- **Scope:** List what in scope as well as what's out of scope. Being specific about scope will help manage expectations.
- **Deliverables:** List the products or results you expect upon completion of the project.
- **Goals Alignment:** State how your project aligns with your organization's Board Goals, LCAP Goals, Department Goals, etc.
- **Objectives/Success Criteria:** Think about how you will know if your project was a success. For the items you list here, there should be some way to measure or have evidence that your project was successful. Examples: Improved efficiency, improved process, increased satisfaction.
- **Risks:** Make a list of potential risks and include how you will mitigate the risk. Sometimes doing this helps you identify new project needs.

Part IV: Project Schedule & Milestones

- Think through the phases and major milestones for your project.
- You will not know EVERY task and activity. Try to gather as much as you can to create a realistic schedule and phases.
- Remember to include time at the end to close out your project.
- Keep in mind that you will use Part IV to build out your project plan later.

Part V: Tools

- Consider which tools are needed for this project. You can make these match the tools your organization uses. For example, if you are using Google Drive, make sure you identify the location and who needs access.

When you're done...

- Meet with your Project Sponsor and review the Project Charter. Obtain authorization to proceed.
- Type their name and authorization date at the top of the Project Charter; remove 'DRAFT'.
- Store the Project Charter in your file repository for your project.

Project Charter DRAFT

Project authorized by ________________ on _________

I. Project Name

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

II. Project Organization

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

Project Manager *Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives* • X	**Sponsor** *The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project* • X
Steering Committee ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *Key people that assist the project manager in making decisions and moving the project forward* • X	**Stakeholders** ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *An individual, group, or organization that may affect or be affected by outcome of the project* • X
Project Team ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *Supports the project manager in performing work of the project to achieve its objectives* • X	**Others Involved** ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed *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

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

Goals Alignment *With which Board Goals and ITS Goals does this project align?*	
☐ #B1 Connect the educational experience to the world of work	☐ #ITS1 Maximize Customer Success
☐ #B2 Provide educational opportunities and supports to SDCOE schools and school districts	☐ #ITS2 Create Value
☐ #B3 Become the leader and model for innovation	☐ #ITS3 Improve Division Efficiencies
☐ #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE	☐ #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.			

Potential phases/milestones might include: Research/Discovery, Purchasing/Receiving, Configuration/Design/Build/Customization, Testing, Training, Go Live Prep, Go Live/Implementation, Support/Operationalize, Closeout (which might include Lessons Learned, Survey, Final Report, Celebration, Archive, Sign Off)

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 lessons learned meetings and documentation, surveys/evaluations, final report, a celebration and/or acknowledgement, archiving, and final sign off.

Project Charter Lite DRAFT

Project authorized by __________________ on __________

1a. Name of Project	**1b. Project Date Range (Start, End)**
X	X/X/XX - X/X/XX

2a. Project Sponsor	**2b. Project Manager**
X	X

2c. Project Team Members	**2d. Stakeholder Audience(s)**
X X X X	X X

3. Project Description
What is the purpose of your project? What need does it fulfill? Who is it for?

X

4a. What is in scope? *List what will be included in this project.*	**4b. What is out of scope?** *List the things you will NOT be doing for this project.*
• X • X • X • X	• X • X • X

5. Project Schedule / Milestones
Examples: Research/Discovery, Purchasing/Receiving, Configuration/Design/Build/Customization, Testing, Training, Go Live Prep, Go Live/Implementation, Support/Operationalize, Closeout (Lessons Learned, Survey, Final Report, Celebration, Archive, Sign Off)

Phase / Milestone	Date Range / Target Date
1. X	
2. X	
3. X	
4. X	
5. X	
6. X	
7. X	
8. X	
9. X	
10. X	

6. Comments / Notes

Project Charter

Project authorized by Beckie Benson on October 21, 2021

I. Project Name

Project Name Adobe Sign Implementation Project	**Start Date** 07/29/2021	**End Date** 02/28/2022	

II. Project Organization

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

Project Manager

Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives

- Reesa Fickett
- Candace Wong, Project Management Asst

Sponsor

The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project

- Beckie Benson, EA Executive Director

Steering Committee

☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed

Key people that assist the project manager in making decisions and moving the project forward

- Andi Loree, Bus Svc
- Bill Dowler, HR
- TBD, LLS
- Erika Montgomery, JCCS
- Shauna Stark, Applications

Stakeholders

☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed

An individual, group, or organization that may affect or be affected by outcome of the project

- All SDCOE employees
- Customers of SDCOE
- Form owners from each division
- Group Admins for each group

Project Team

☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed

Supports the project manager in performing work of the project to achieve its objectives

- App Dev Team: Uyen Quach, Haison Tran, Ivan Constantino, Ruaa Matti
- Juan Pablo Rodriguez for Adobe Sign Console, SSO sync errors
- Tyler Petro for SSO and licensing
- Support Team (Group Admins, Form Owners, CSS, App Dev)

Others Involved

☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ As Needed

List anyone else who will be involved and state their roles

- Stacy Brandt for communications
- Tammy's team for videos
- Legal Department for consultation
- AdobeSign partner/professional services

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?

Imagine a day when SDCOE employees can sign documents electronically from anywhere, with no need for physical routing, which can be slow and cumbersome. Imagine the system is easy to use, convenient, fast and secure. Visualize your documents being processed faster, more efficiently, and that you have visibility to where your documents are in the workflow. This purpose of this project is to implement Adobe Sign across SDCOE for electronic signatures. The work will be divided into three phases to allow us to convert our forms, train Form Owners and Group Admins, train end users, and implement a workflow for nearly 300 existing forms.

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

- All SDCOE divisions receive their digitized form templates delivered in Adobe Sign
- **Phase 1:**
    - Convert all of the forms from each division into templates in 3 waves:
        - Wave 1: HR and ITS (HR on their own and Professional Services)
        - Wave 2: Business Services and Administration (Professional Services)
        - Wave 3: LLS, SSP, JCCS (Professional Services)
    - QA of forms by Project Team members (e.g., Best Practice & Use)
    - UAT of forms by Form Owners and Power Users with AppDev
    - Training for Group Admins and Form Owners in how to manage their forms
    - Create Training Guides, Tools, and Videos
    - Training for end users in how to sign form using Adobe Sign
    - Identify templates that are candidates for webforms
    - Integration with Outlook and Teams (pilot with AppDev and EPMO)
- **Phase 2:**
    - Implement workflow for forms:
        - Build the workflow for divisions
        - Provide training and support to Form Owners
        - Add forms that have not yet been catalogued
- **Phase 3**
    - Full Automation State with Reengineered Business Process
        - Automated workflow
        - Integration with other key applications (PeopleSoft and ServiceNow)
- Support will be provided by the Group Admins, Form Owners and CSS and App Dev from ITS

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

- Conversion of 300 paper forms into digital forms
- Adobe Sign becomes the default way to process forms in SDCOE
- All SDCOE divisions are involved in the phased implementation and realize the benefits of the system
- Reduce paper waste
- Reduce printing costs
- Improve accuracy and compliance
- Reduce time spent tracking form status
- SDCOE and our partners will experience a smooth transition to using AdobeSign for electronic and digital signatures
- Stakeholders will report comfort with the new process
- Stakeholders will report they were well informed
- Stakeholders will report training met their needs and prepared them to use the product
- Stakeholders will report being able to sign documents on any device (cell phone, chrome book, etc.)
- Group Admins from each division will report confidence in supporting their division through the transition

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

Deliverables

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

- 300 digitized forms with workflow
- Roadmap of phases and future workflow and integrations
- Configure Adobe Sync and setup groups
- Timeline
- Organization Change Management Plan
- Communication Plan
- Testing Plan (QA and UAT)
- Training Plan
- Support Plan
- Group Admins Plan from each division
- Governance Plan

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.

- **Divisions may attempt to add forms during the implementation.** We will need a process to determine the level of effort required. Some forms may need to wait until Phase 2.
- **Resource constraints.** We need to identify training, support and communications resources ahead of time.
- **Limited user adoption.** Work with the stakeholders to identify realistic implementation levels.
- **There may be extra charges for additional functionality.** Examples: Verification, licenses, etc.

IV. Project Schedule & Milestones

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

See Monday.com board for detailed project plan https://sdcoe-its.monday.com/boards/706532584

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1. **Research and Discovery** Learn the current landscape, inventory existing forms, identify current routing/approval processes, conduct stakeholder meetings			
2. **Configuration and Setup** Set up the new environment, configure roles/permissions, determine naming conventions, plan for potential integrations			
3. **Phase 1: Digitize & Train** Convert all SDCOE forms to Adobe Sign templates and train users			
4. **Phase 2: Build & Launch Workflows** - Implement workflows and bring in any missing forms			
5. **Phase 3: Automate & Integrate**			
6. **Project Closeout** Final Lessons Learned, Survey, Final Report, Celebration, Sign Off			

V. Tools

☒ Monday.com	If Yes, which board? https://sdcoe-its.monday.com/boards/706532584 Do any new members need to be added? ______________________________
☒ Microsoft Teams	If Yes, which team/channel will you use? **TEAM EDS Project** https://sdcoe2.sharepoint.com/sites/TeamEDSProject/Shared%20Documents/Forms/AllItems.aspx?viewid=f3f06016%2D6ca2%2D40ac%2Da030%2Ddf2b19469400&id=%2Fsites%2FTeamEDSProject%2FShared
☐ OneDrive	If Yes, whose OneDrive, and what is the folder named? ______________________
☐ SharePoint Site	If Yes, which site, and what is the folder named? ______________________
☐ Other	

Project Charter

Project authorized by Terry Loftus on 3/19/21

I. Project Name

Project Name	ServiceNow Education for SDCOE Employees	**Start Date**	03/01/21	**End Date**	05/07/21

II. Project Organization

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

Project Manager *Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives* • Peyri Herrera	**Sponsor** *The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project* • Terry Loftus
Steering Committee ☒ Weekly ☐ Bi-Weekly ☐ Monthly ☒ As Needed *Key people that assist the project manager in making decisions and moving the project forward* • ITS Senior Leadership	**Stakeholders** ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☒ As Needed *An individual, group, or organization that may affect or be affected by outcome of the project* • All SDCOE Employees, with an emphasis on Executive Assistants, Admin Assistants, and Program Secretaries; and new hires • Computer Support Services (CSS)
Project Team ☒ Weekly ☐ Bi-Weekly ☐ Monthly ☒ As Needed *Supports the project manager in performing work of the project to achieve its objectives* • Peyri Herrera, Flora Pourzamani, Tyler Petro, Candace Wong	**Others Involved** ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☒ As Needed *List anyone else who will be involved and state their roles* • Stacy Brandt for assistance with communications • Leo Cole • John Vaillancourt and Uyen Quach for guidance on ServiceNow functionality

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?

ServiceNow, also referenced as the SDCOE Service Portal, was launched in January 2020 to all SDCOE employees so they can enter support tickets. In February and March 2021, several fixes and updates were made to improve the customer experience.

The goal of this project is to educate SDCOE employees on how and why to use ServiceNow:

- How to log in using the SDCOE Staff Login link
- The difference between "requesting something" and "reporting a problem"
- How to use the Home search bar to search for a requestable item and to search the knowledgebase
- How to go to Request Something to search from the catalog
- How to go to Report a Problem and use the dropdown menu ("I am having trouble with")
- How to use the bottom half of the screen: My Open Incidents, My Past Incidents, My Requested Items, My Closed Requests
- Reassure employees that tickets are reviewed and addressed in a timely fashion (they don't fall into a black hole)

We will create a job aid and 2-minute video. New hires will receive the information at onboarding. A training meeting will be conducted with Executive Assistants, Admin Assistants, and Program Secretaries.
The outcome of the project is to reduce the requests that come in "through the side door" (direct emails, phone calls, chats, and walk-ins to CSS and other ITS staff); instead they will be entered in ServiceNow.

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

In scope:

- This effort will impact all SDCOE employees who request services and/or need help resolving technical issues. Because Executive Assistants, Administrative Assistants, and Program Secretaries often assist others by entering tickets on their behalf, we will work closely with that audience.

Out of scope:

- This project is not intended to educate PeopleSoft or SIS customers.
- This project is for educating employees on ServiceNow as it exists in March 2021 – no ServiceNow development or changes are needed for this project.

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

- A job aid posted at Common Ground > Information Security > ServiceNow
- A 2-minute "How to Submit a Technology Support Ticket Using ServiceNow" video that welcomes SDCOE employees, explains how to log in to ServiceNow (active directory), explains the difference between "requesting something" and "reporting a problem", and walks thru how to enter requests and report problems (referencing the Top 5 Requests and Top 5 Incidents)
    - Video can be accessed on Common Ground
    - Video can be played at New Hire Orientation (if there is time in the schedule)
    - Video can be played by Managers at a future department meeting
- The recorded 30-minute training meeting with Administrative Assistants/Program Secretaries posted at Common Ground > Information Security > ServiceNow
- A variety of communications from Stacy Brandt (methods are TBD)
- A script for CSS to use when someone contacts them directly

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 Deliver Value: Applications & Systems
☒ #ITS3 Improve Division Efficiencies
☐ #ITS4 Be the Cybersecurity Solutions Leader

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

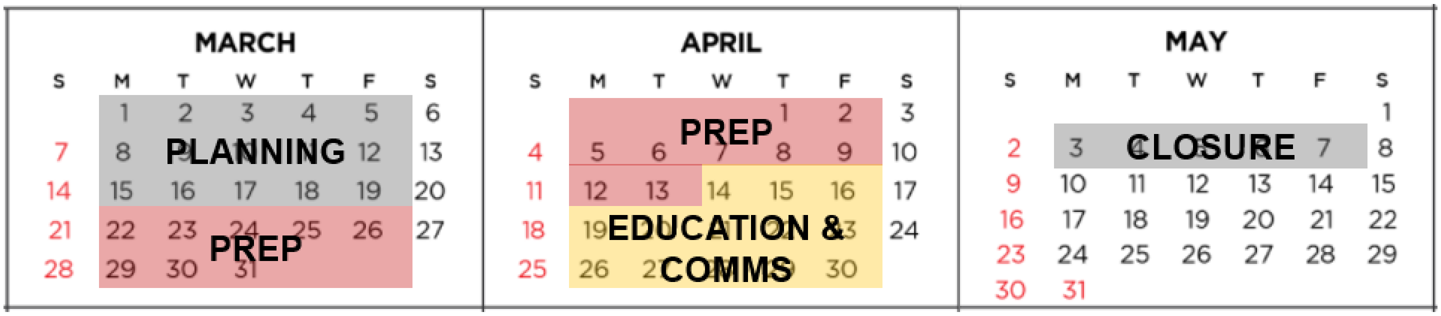
At the completion of the project:

- All SDCOE employees, and especially the Executive Assistants, Administrative Assistants, and Program Secretaries, will know the expected procedure for requesting tech support
- The new job aid and video will be clear, concise, and easy to use
- More SDCOE employees will know how to access ServiceNow and correctly enter a ticket (when they need to)
- There will be a decrease in the number of emails, phone calls, chats, and walk-ins asking for assistance from CSS
- New employees will have exposure to ServiceNow at orientation/onboarding (like simply logging in to ServiceNow)

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.

- "Frequent Flyers" might continue to go thru the side door. To mitigate this, we should have a friendly script ready to go that all agents can use to help reduce future occurrences. CSS and other agents must commit to using the script.
- SDCOE Employees might not pay attention to how to enter a ticket until they really need it. To mitigate this, we need to make the "getting started" information extremely accessible.

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. **Planning (3 weeks)** • Obtain from Tyler the Top 5 Requests and Top 5 Incidents ***(PEYRI, FLORA)*** • Test entry of the top requests and incidents ***(PEYRI)*** • Obtain from John V. the dropdown list of incidents that SDCOE staff can choose from ***(PEYRI)*** • Determine if the "I am having trouble with" search box can be a Contains search instead of Begins With (for better usability) ***(UYEN)*** • Work with John V. to determine who will conduct the training meeting with Admin Assistants ***(PEYRI)***	Peyri, Flora	3/1/21	3/19/21
2. **Prep Phase (3.5 weeks)** *Design/Develop Materials* • Create job aid ***(PEYRI, CANDACE)*** • Create video ***(PEYRI)*** • Review and sign off on materials • Post materials on Common Ground *Plan Meetings* • Schedule and conduct Teams meeting with CSS to inform them of the effort ***(TYLER)*** • Set up spreadsheet to capture baseline metrics ***(PEYRI/CANDACE)*** • Have CSS populate spreadsheet ***(TYLER)*** • Draft email to Admin Assistants and Program Secretaries ***(CANDACE, PEYRI)*** • Determine date/time and schedule Teams dry run AND training meeting with Admin Assistants and Program Secretaries ***(CANDACE)*** • Request from Leo that at future New Hire Orientations that ITS has 5 extra minutes to: play the 2-minute video and have all new hires navigate to ServiceNow and log in ***(FLORA)*** • Find out if we can present to Managers for 15 minutes at a future COMET meeting and ask them to share the 2-minute video at their department meeting ***(FLORA)*** *Plan Communications* • Work with Stacy on methods of communications ***(FLORA/PEYRI)***	Peyri, Candace, Flora	3/22/21	4/13/21

• Draft the "friendly script" that CSS and other agents will use when employees continue to not use the system to submit a ticket ***(TYLER/PEYRI)***			
3. **Execution: Education and Communications (2.5 weeks)** *Conduct Meetings* • Meet with CSS ***(TYLER)*** • Practice/dry run for training meeting ***(TYLER, PEYRI)*** • Conduct Teams training meeting with Admin Assistants and Program Secretaries ***(TYLER, PEYRI)*** • TBD – Conduct presentation at COMET ***(TYLER, PEYRI)*** *Execute Communications* • Send/post a variety of communications ***(STACY)***	Peyri, Tyler, Stacy	4/14/21	4/30/21
4. **Closure (1 week)** **NOTE: We will need to capture post metrics 1-3 months later.**	Peyri	5/3/21	5/7/21

V. Tools

☒ Monday.com	If Yes, which board? ***EPMO General Board*** Do any new members need to be added? ***Yes: Tyler (will be removed after the project ends)***
☒ Microsoft Teams	If Yes, which team/channel will you use? ***EPMO Team > Documents > General > Projects > ServiceNow Education for SDCOE Employees (for storing documents) – Tyler and John V. need access to this 1 folder***
☐ 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.

2.2

Project Plan

- Project Plan Guidance
- Project Plan Excel Template

PROJECT PLAN GUIDANCE

What's the difference between the Project Charter and the Project Plan?

Project Charter	Project Plan
• Word document	• Project management (PM) software • Excel or Google Sheets are useful if you don't have PM software
• Created *before* the work begins	• Set up *after* the Project Charter is authorized
• Part IV has a timeline and milestones • Example: *Training (4 weeks)*	• Use Part IV to get specific details on tasks • Examples: *Identify training objectives, Write a training plan, Develop job aid, Conduct 2 training sessions, Evaluate*
• Artifact – no need to modify it after receiving authorization	• "Living, breathing" plan that evolves • **Everyone: ADD NEW TASKS, ADJUST DATES, ADD NOTES/COMMENTS, COLOR CODE YOUR STATUS**

- The **Project Charter** sets the vision; is high level; is a snapshot in time; stored in a static Word document
- The **Project Plan** contains all the specific tasks (work to complete) for your project; it needs to be actionable, manageable, changeable; typically stored in software so you and the project team can best manage/track all the work

To build a Project Plan, what should I do?

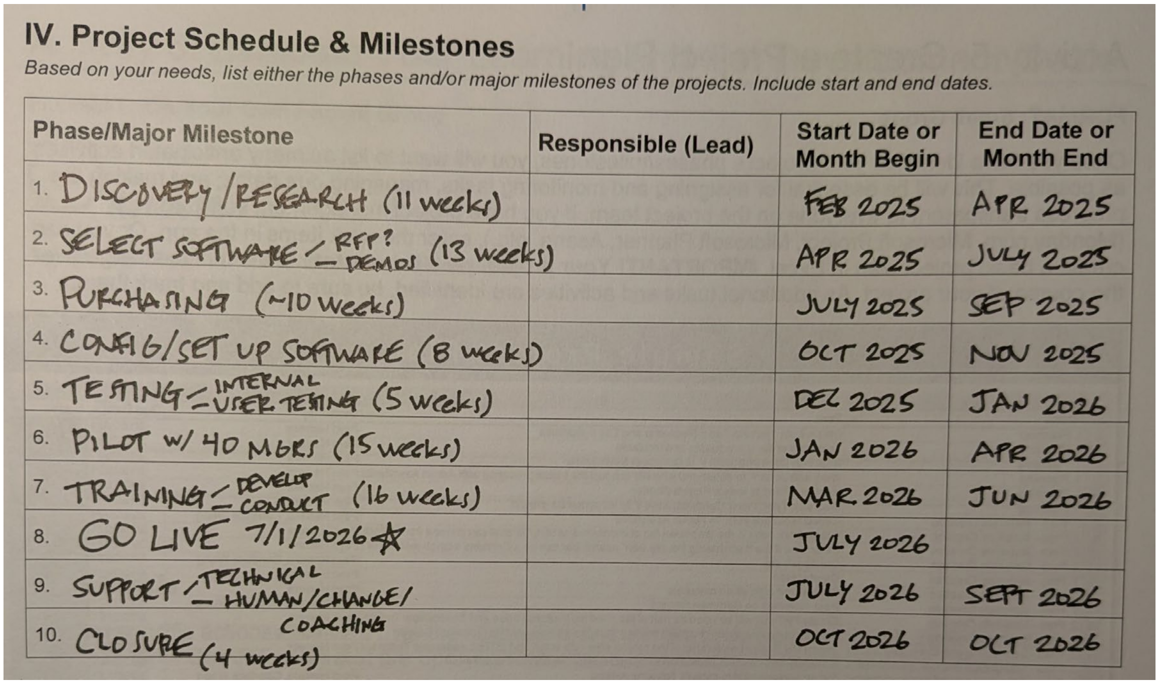
There are probably a lot of unknowns at this stage, as if you're putting together a puzzle but you don't know what the puzzle box cover looks like. To work toward a Project Plan, you'll want to identify:

1. What are the "buckets of work" (phases)?
2. What are the tasks for each bucket, and how long will they take?
3. How does all of this plot out on a calendar?

1. Identify the "buckets of work" (phases).

The "buckets of work" are your project's phases and milestones. Use the list you put in your Project Charter (Part IV. Project Schedule & Milestones).

Example:



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. DISCOVERY/RESEARCH (11 weeks)		FEB 2025	APR 2025
2. SELECT SOFTWARE – RFP? – DEMOS (13 weeks)		APR 2025	JULY 2025
3. PURCHASING (~10 weeks)		JULY 2025	SEP 2025
4. CONFIG/SET UP SOFTWARE (8 weeks)		OCT 2025	NOV 2025
5. TESTING – INTERNAL – USER TESTING (5 weeks)		DEC 2025	JAN 2026
6. PILOT W/ 40 MBRS (15 weeks)		JAN 2026	APR 2026
7. TRAINING – DEVELOP – CONDUCT (16 weeks)		MAR 2026	JUN 2026
8. GO LIVE 7/1/2026		JULY 2026	
9. SUPPORT – TECHNICAL – HUMAN/CHANGE/COACHING		JULY 2026	SEPT 2026
10. CLOSURE (4 weeks)		OCT 2026	OCT 2026

Before you proceed...Please note that can do #2 and #3 in the order that works best for you, or do them simultaneously. Remember, you're putting together a puzzle!

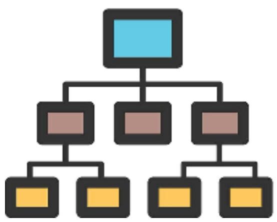
2. Identify the tasks for each "bucket", and how long they will take (project schedule).

Your goal is to figure out as much of the work as you can so you can come up with a reasonable schedule. It's not always clear or easy to know at this stage what all of the tasks will be, so ask your project team and anyone else doing the work. You also might want to consult a generative AI tool to see if it helps generate ideas for tasks (and it might come up with things that are beneficial that you hadn't thought of). Here are

STEPS TO ESTABLISH A PROJECT SCHEDULE

1. **Define your project.** If you already wrote a Project Charter, then you're done. At this step you want to know the scope, deliverables, stakeholders, and general timeline for your project.

2. **Identify tasks by creating a Work Breakdown Structure (WBS).** Break the project down into **a list or diagram** that represents everything the project must accomplish. A Work Breakdown Structure (WBS) is commonly used to assist in this process.
   - RECOMMENDATION: Use https://app.diagrams.net/ to create a WBS (similar to Visio, free, requires no login). Here are the steps:



     1. Go to https://app.diagrams.net/
     2. Click … (top right)
     3. File > New
     4. Search for "breakdown" (top left)
     5. Select the template and hit Create
     6. Double-click a square to change the text
     7. Start by identifying all top-level key deliverables or phases, then work your way down each lane

3. **Estimate durations.** Estimate the amount of time that each task is expected to take. Three-Point Estimation is often used to provide realistic values. Don't forget to set a Schedule Reserve to accommodate unexpected delays.

4. **Identify dependencies.** Determine which tasks are reliant on others. Dependencies can be Finish to Start, Start to Start, Finish to Finish, or Start to Finish.

5. **Sequence tasks.** Define the logical sequence of the work to be done. A Project Network Diagram may help to visualize, especially on a compressed timeline with several tasks occurring simultaneously.

6. **Assign resources.** Assign people, equipment, materials, physical space, and other resources to the tasks. Be wary of over-relying on one resource and consider that outside resources may have additional constraints.

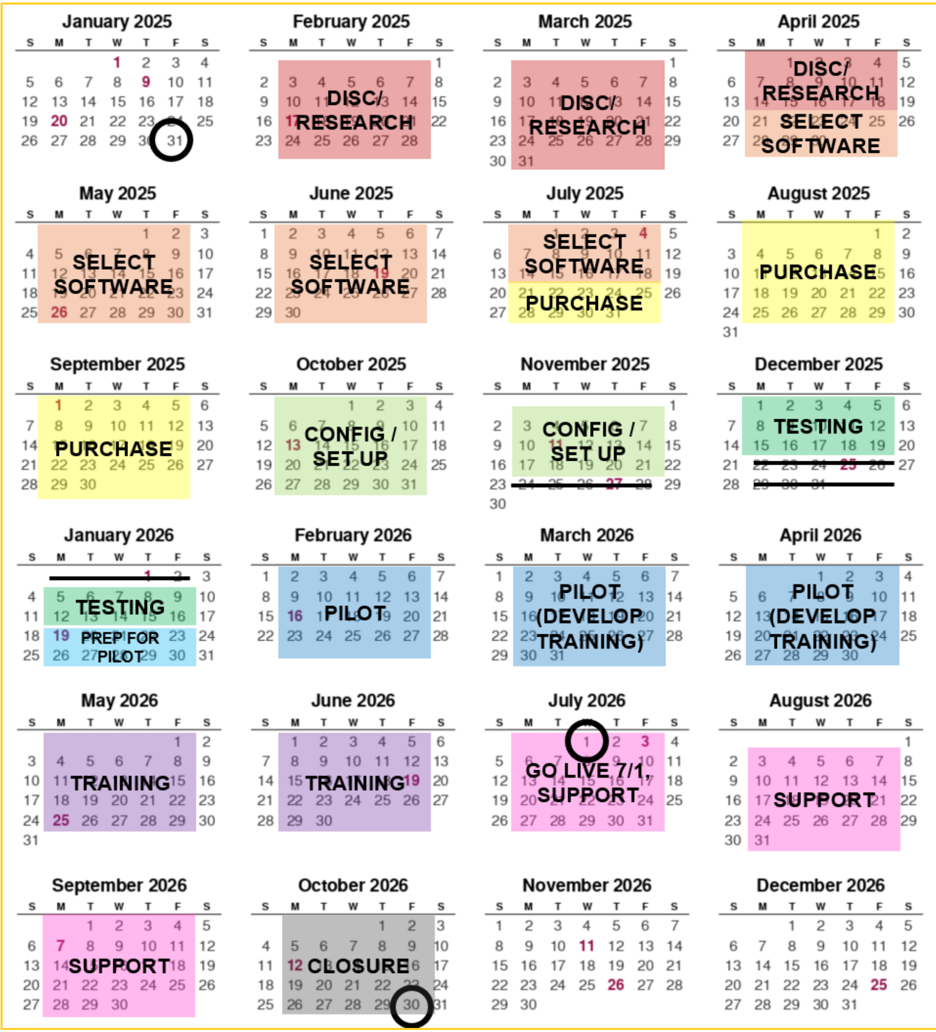
7. **Set due dates.** Set realistic due dates for milestones and deliverables.

8. **Review.** Review the whole schedule. Look for gaps or conflicts, make sure resources aren't overextended, identify risks, take note of action items, and plan for potential delays.

3. Plot out the project on a color-coded calendar (project schedule).

A simple color-coded calendar helps communicate your project schedule in a visual way, and using a calendar as you're figuring out phase durations might help you better plan around holidays, breaks, and other events.

Sample:



STEPS TO CREATE A COLOR-CODED CALENDAR

1. Generate a calendar with the range of months for your project.
   RECOMMENDATION: Use Timeanddate.com "Yearly" format (free, requires no login).
2. Either print (if you're going to mark it up by hand) or paste the calendar into PowerPoint (recommended) or a draw tool. PowerPoint allows you to easily move elements that you lay down (circles, lines, boxes).
3. Circle your key dates. Examples: Start date, end date, target go live.
4. Use lines to strike through any days or weeks that project work will not occur. Examples: Thanksgiving Break, Winter Break, holidays.
5. Color code phases or groups of work. (This is where the WBS comes in handy to understand tasks and durations.)
6. Review the schedule.

You are ready to turn your schedule into a Project Plan.

Now that you've got the schedule figured out and have identified numerous tasks, it's time to move into your Project Plan, the tool that will help you manage and track the work. You can use Excel, Sheets, or project management software.

View a short tutorial: [Project Plan Tips]

Sample Project Plan in Excel

	A	B	C	D	E
1	Phase	Item	Owner(s)	Due Date	Status
2	1. Planning	Obtain from Tyler the Top 5 Requests and Top 5 Incidents	Peyri Herrera	3/16/2021	Done
3	1. Planning	Test entry of the top requests and incidents	Peyri Herrera	3/16/2021	Done
4	1. Planning	Meet with Uyen and John V. to talk about ServiceNow	Peyri Herrera	3/16/2021	Done
5	1. Planning	Work with John V. to determine who will conduct the training meeting with Admin Assistants	Peyri Herrera	3/18/2021	Done
6	1. Planning	Meet with Terry to review Project Charter	Peyri Herrera	3/18/2021	Done
7	1. Planning	Meet with Tyler, Flora, Candace, John V. to introduce the project	Peyri Herrera	3/19/2021	Done
8	2. Prep - Materials Creation	Collect feedback from 16 Admin Assistants	Peyri Herrera, Candace Wong	3/26/2021	Done
9	2. Prep - Materials Creation	Obtain from John V. the dropdown list of incidents that SDCOE staff can choose from (Work	Peyri Herrera	3/29/2021	Done
10	2. Prep - Materials Creation	Determine if the "I am having trouble with" search box can be a Contains search instead of E	Peyri Herrera	3/29/2021	Done
11	2. Prep - Materials Creation	Create job aid	Peyri Herrera, Candace Wong	4/12/2021	Done
12	2. Prep - Materials Creation	Create video	Peyri Herrera	4/12/2021	Done
13	2. Prep - Materials Creation	Review and sign off on materials	Peyri Herrera	4/13/2021	Done
14	2. Prep - Materials Creation	Post materials on Common Ground	Peyri Herrera, Candace Wong	4/13/2021	Done
15	2. Prep - Materials Creation	Create PPT that will be used as part of the short instructional video and ServiceNow Trainin	Peyri Herrera	4/13/2021	Done
16	2. Prep - Materials Creation	Provide Susana with the recorded training meeting video to post on Common Ground	Candace Wong	4/20/2021	Done
17	3. Prep - Scheduling and Communications	Inform ITS Senior Leadership of the project plan - via email and at ITS Leadership Team Me	Peyri Herrera	3/22/2021	Done
18	3. Prep - Scheduling and Communications	Schedule and conduct Teams meeting with CSS to inform them of the effort	Tyler Petro	3/23/2021	Done
19	3. Prep - Scheduling and Communications	Set up spreadsheet to capture baseline metrics	Peyri Herrera, Candace Wong	3/23/2021	Done
20	3. Prep - Scheduling and Communications	Draft email to Executive Assistants, Admin Assistants, and Program Secretaries	Candace Wong	3/24/2021	Done
21	3. Prep - Scheduling and Communications	Set up spreadsheet of identified admin staff for training and review with Ewa	Candace Wong	3/24/2021	Done
22	3. Prep - Scheduling and Communications	Determine date/time and schedule Teams dry run AND training meeting with Admin Assista	Candace Wong	3/26/2021	Done
23	3. Prep - Scheduling and Communications	Meet with Tyler, Flora, and Candace to review progress/discuss next steps for project	Peyri Herrera	3/26/2021	Done
24	3. Prep - Scheduling and Communications	Review draft email to assistants to introduce project and mention training meeting	Peyri Herrera	3/29/2021	Done
25	3. Prep - Scheduling and Communications	Request from Leo that at future New Hire Orientations that ITS can play the 2-minute video a	Peyri Herrera	3/30/2021	Stuck

TIPS FOR CREATING A PROJECT PLAN IN EXCEL/SHEETS:

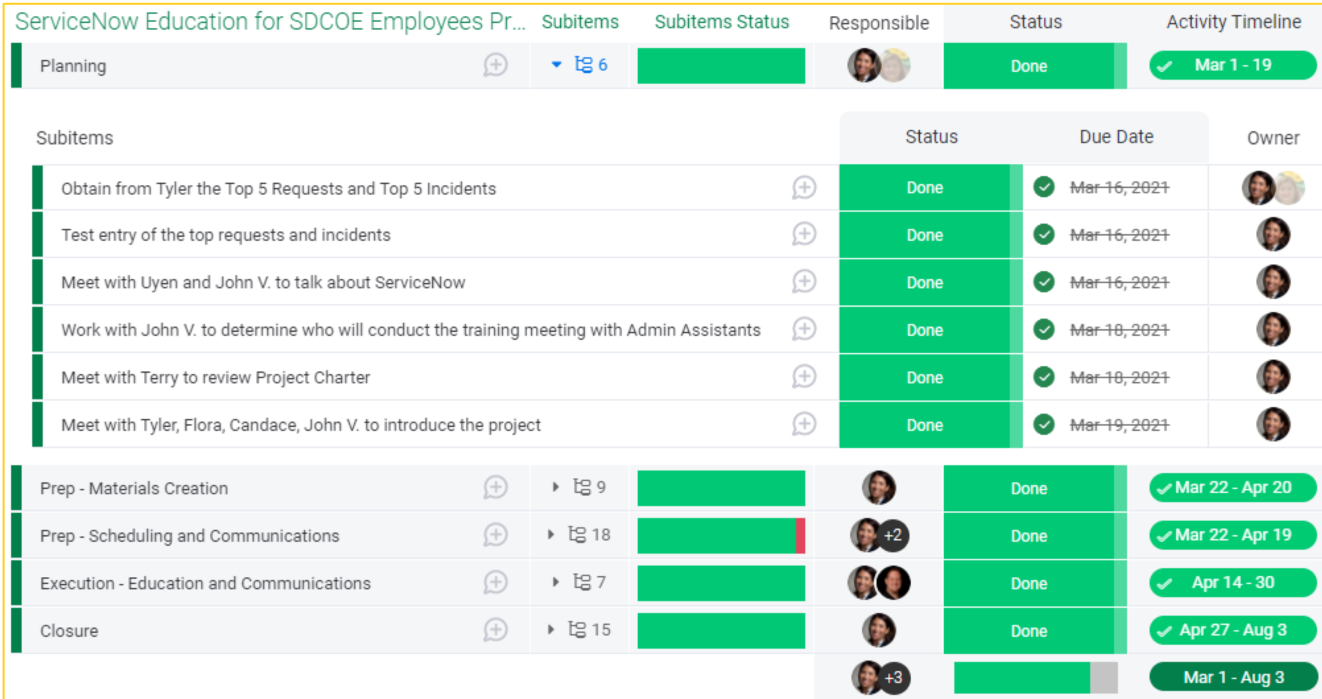
- Number your phases so they appear ordered when you sort/filter.
- Use column filters to view information (filter by phase, by owner, by status, by due date).
- Starting an item with a verb can help clarify the task.
- Set up the spreadsheet as a shared doc and encourage team members to add and update their own items.
- Set reasonable and realistic due dates when establishing your plan.
- Limit your statuses to a few and be consistent in their use. Example:

Working on it
Stuck
Done
[Blank] = Not started

- **IMPORTANT!** Your Project Plan is not static. Expect it to change over the course of your project. As additional tasks and activities are identified, be sure to add and track them.

Sample Project Plan in Project Management Software (Monday.com)

If you have project management software (Microsoft Project, Microsoft Planner, Asana, Monday.com, etc.), enter the work items in the app.



ServiceNow Education for SDCOE Employees Pr...	Subitems	Subitems Status	Responsible	Status	Activity Timeline
Planning	6			Done	Mar 1 - 19

Subitems	Status	Due Date	Owner
Obtain from Tyler the Top 5 Requests and Top 5 Incidents	Done	~~Mar 16, 2021~~	
Test entry of the top requests and incidents	Done	~~Mar 16, 2021~~	
Meet with Uyen and John V. to talk about ServiceNow	Done	~~Mar 16, 2021~~	
Work with John V. to determine who will conduct the training meeting with Admin Assistants	Done	~~Mar 18, 2021~~	
Meet with Terry to review Project Charter	Done	~~Mar 18, 2021~~	
Meet with Tyler, Flora, Candace, John V. to introduce the project	Done	~~Mar 19, 2021~~	

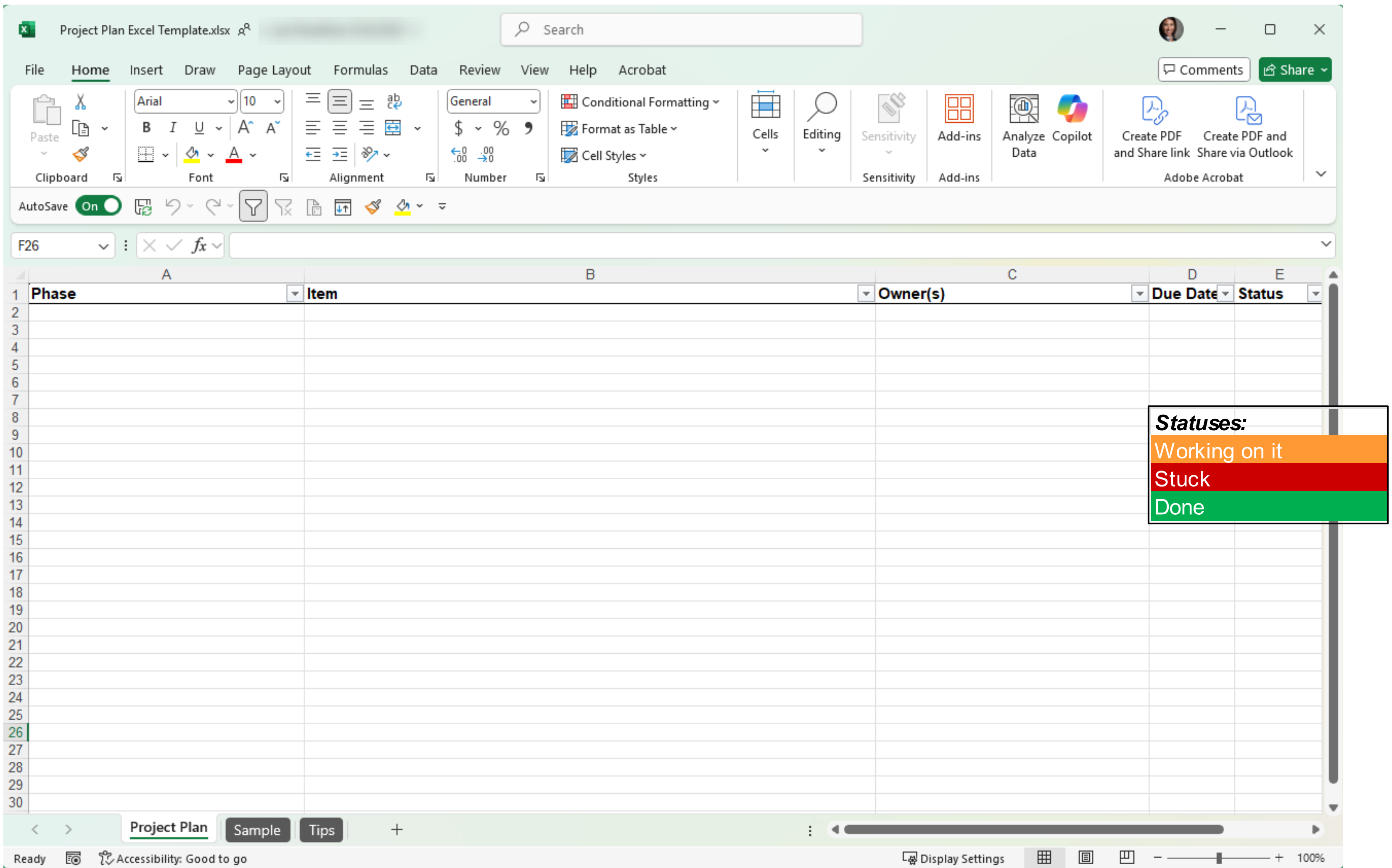
ServiceNow Education for SDCOE Employees Pr...	Subitems	Subitems Status	Responsible	Status	Activity Timeline
Prep - Materials Creation	9			Done	Mar 22 - Apr 20
Prep - Scheduling and Communications	18		+2	Done	Mar 22 - Apr 19
Execution - Education and Communications	7			Done	Apr 14 - 30
Closure	15			Done	Apr 27 - Aug 3
			+3		Mar 1 - Aug 3

TIPS FOR CREATING A PROJECT PLAN IN MONDAY.COM:

- **Items (Parent level):**
  - Name: Enter the major milestones, phases, or however you have organized the work. Examples: Planning, Prep, Execution, Closure
  - Responsible: Enter the person(s) responsible for the parent level item
  - Status: This is to mark the status of the entire phase and its subitems
  - Activity Timeline: Enter the date range of the phase. All subitem due dates should fall within the activity timeline.
- **Subitems (Children):** For each item, enter all of the subitems. These are the activities that occur during the phase. Click the # in the Subitem column to expand the subitems. At minimum, enter:
  - Task/activity name
  - Status
  - Due Date
  - Owner
- **Comments:** For items and subitems, click the talk bubble to enter any comments/notes for the items or subitems.
  - By default, all persons listed as Responsible will automatically receive an email with the comment. Use @mention to notify someone who is not listed as Responsible.
  - @mention: Type the @ sign and the person's name to notify that person
  - Like: Click "Like" to show you've seen the comment
  - Reply: Type a reply on a comment as needed
- **IMPORTANT!** Your Project Plan is not static. Expect it to change over the course of your project. As additional tasks and activities are identified, be sure to add and track them.

PROJECT PLAN EXCEL TEMPLATE

Go to epmo.sdcoe.net > **Resources** to download an Excel template that you can use to create a project plan.
The Status column has conditional formatting. Example: Type “Done” and the cell will turn green.
There are two extra tabs (Sample, Tips) to guide you.



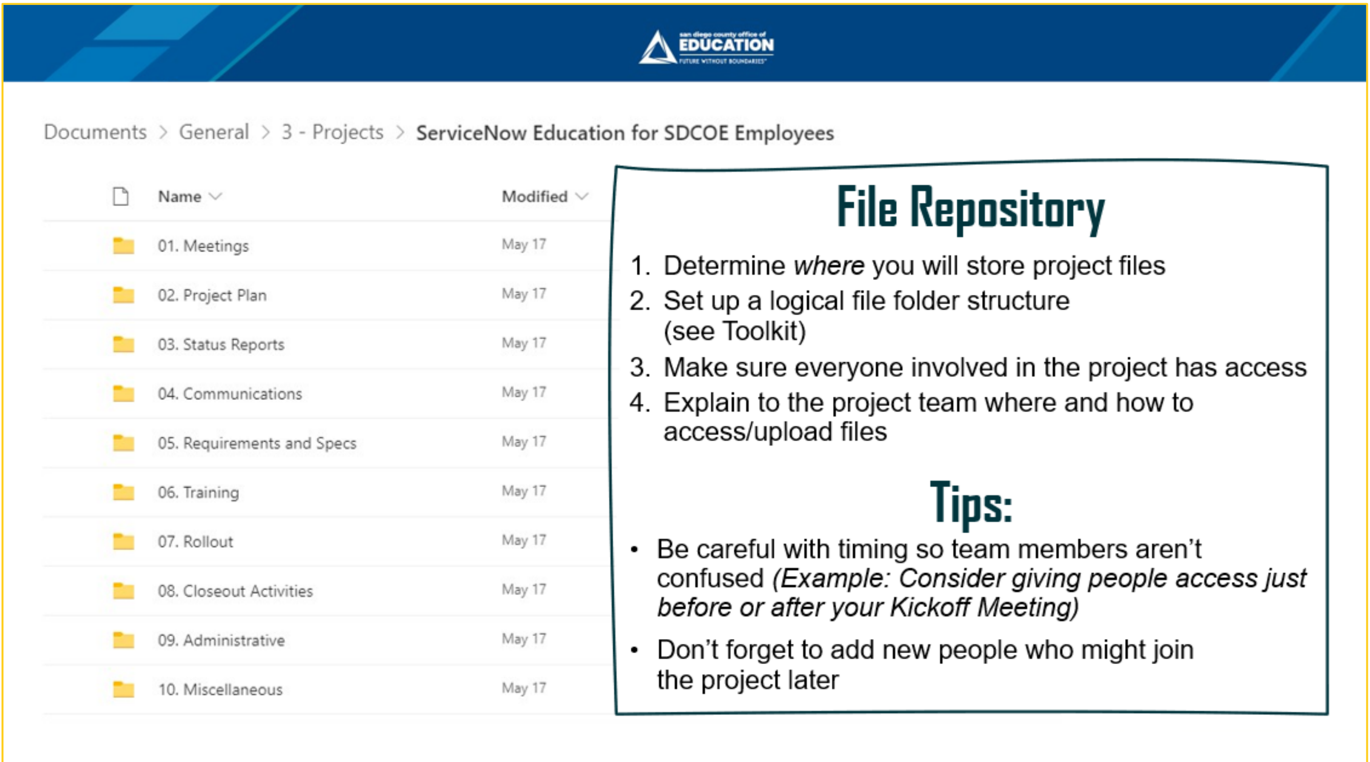
2.3

Other Planning Elements

- File Repository
- Kickoff Meeting
- Gather Requirements for Your Project

FILE REPOSITORY FOR ALL PROJECT FILES

Be sure to set up a file repository specific to your project with a logical structure. Any project-related file will live here – planning documents, reports, communication templates, configuration files, and so on.



Benefits:

- Helps resolve chaos and confusion (Where is this file? Where should I store this new file? Who has access?)
- Being more organized helps everyone be more efficient, spending less time looking for files other team members own, less time wasted on communication and confusion
- If you do this for each project, you always know where to put things, and where to find them later
- A very simple yet easy way to realize gains

POTENTIAL FOLDERS TO SET UP

TIP: Use 01, 02, 03 in front of folder names so they sort in a logical order. From the list below, omit the ones you do not need, or rename them to better meet your needs.

Folder Name	Examples of Files to Store
01 Project Plan	Project plan, project charter, calendar, project team register
02 Meetings	Agenda, recorded meetings, PPTs, meeting notes
03 Status Reports	Word and PDF versions of status reports
04 Communications	Stakeholder register or contacts/distribution list, communications templates, email mail merge files
05 Deliverables (or 05 Project Files)	Requirements, specs, design docs, or anything else that is produced
06 Testing	Testing plan, test scripts, test issues log, UAT testing
07 Training	Training plan, documentation, videos, recorded trainings
08 Rollout	Files specific to implementations; use subfolders if doing multi-phase rollouts
09 Closure Activities	Lessons learned, surveys, final report, celebration
10 Administrative	Billing, contracts, time tracking
11 Miscellaneous	Only if it doesn't fit anywhere else

KICKOFF MEETING GUIDANCE

Plan and conduct a kickoff meeting so everyone on the project understands what it is and how they're involved. Be sure to invite everyone involved in the project, including your project sponsor and project team members.

What do you want your project team to know?

1. **What and Why.** Share the "what" and "why" of this project. What problem are we trying to solve or what new thing are we creating, and why? For whom? What is the justification? What are the objectives and success criteria?
2. **Who.** Explain the "who." Who is involved in this effort? You can use Part II of your Project Charter to explain which teams and people are involved, and their roles.
3. **When.** Explain the "when." What is the schedule? What are the phases? When is the target go live date?
4. **How.** Explain the "how." How are we all going to work together? What are the expectations? How will everyone communicate and collaborate? When will status meetings be held (if you know)? Will a group chat be created?
5. **Tools.** Demo the tools you will use. Show the file repository, where the project plan is and expectations for using/updating it, and so on.

How do you want your project team members to *feel* at the kickoff meeting?

This new project is likely intended to have impactful, beneficial, and purposeful outcomes. The kickoff meeting is a great opportunity to help your team members feel prepared, confident, excited, clear, part of a team, and so on. Consider what you might **say** and **do** so your project team feels ready to go.

EXAMPLES OF THINGS YOU CAN SAY AT YOUR KICKOFF MEETING:

1. “I really appreciate you all being here. Your time and expertise over the next 4 months will make this project a success.”
2. “A goal of this kickoff meeting is that you leave with a clear sense of what we’re doing and why it matters.”
3. “I’m excited about this project because [say why]. Let me tell you more…”
4. “As we walk through the plan, I want to highlight that this is a collaborative effort. We’ll shape it together as we go. Over the next 4 months, please let me know if you see anything that we can improve as we work on this.
5. “I want to make sure everyone knows that your questions, ideas, and feedback are always welcome throughout this project."

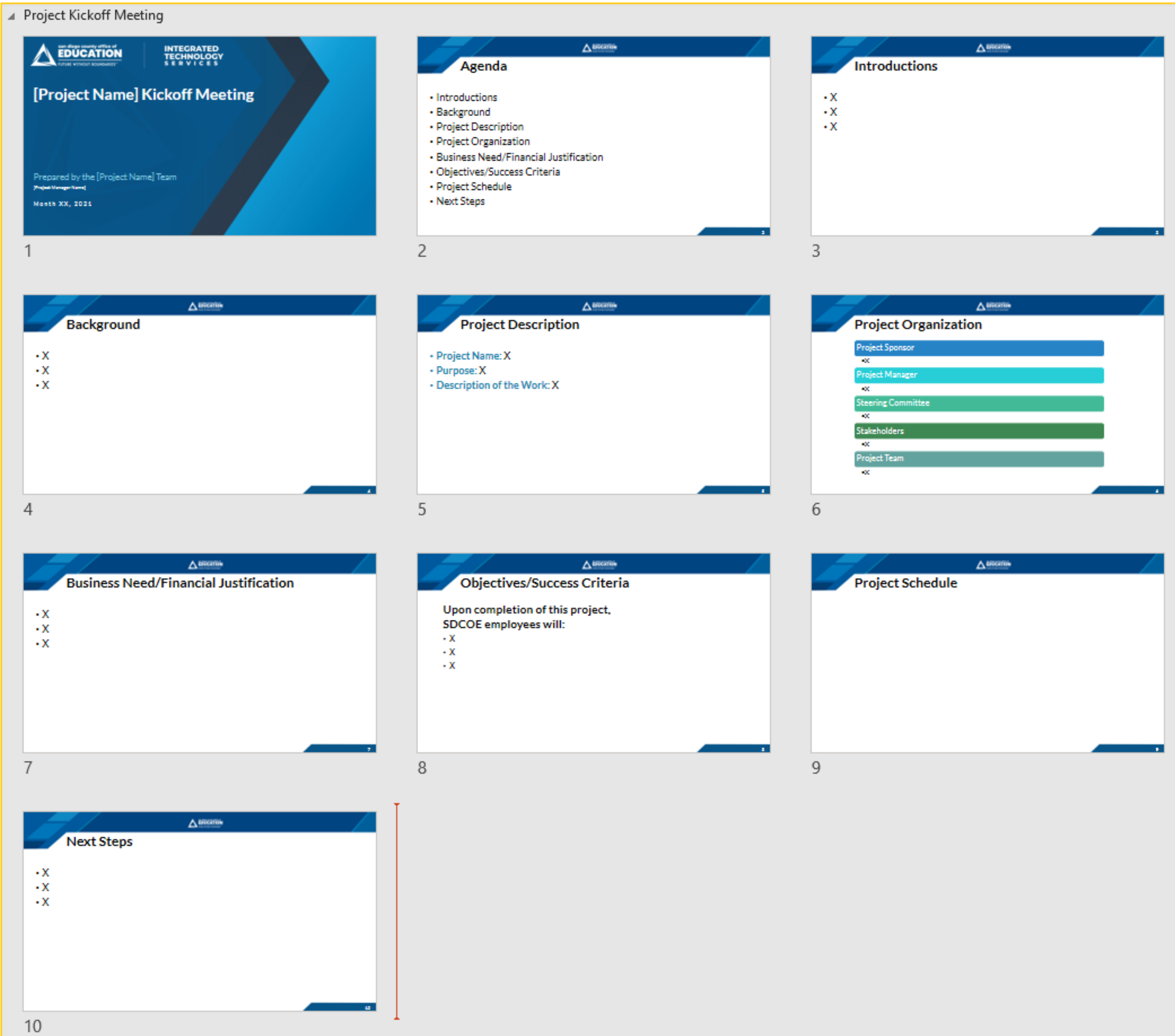
EXAMPLES OF THINGS YOU CAN DO AT YOUR KICKOFF MEETING:

1. Arrive early and greet people individually as they enter the room or call. Use names, smile, and thank them for being there.
2. Display a simple, welcoming slide as people join.
3. Start with a quick icebreaker or warm-up, like asking everyone to share one word they associate with the project or a related success they’ve seen.
4. Use visuals to tell the project story. A vision of the future, a calendar or simple timeline, or a user impact skit can energize the room more than bullets.
5. Pause and ask for reactions or input at key moments. Providing space for team members to participate makes the meeting feel inclusive and collaborative.
6. Celebrate early wins or work already done. “Getting this project conceptualized took effort, and your input helped make that happen.”
7. End with a clear, motivating next step to leave everyone with a sense of momentum “You’ll get the meeting summary by tomorrow, and we’re now ready to officially get started. Our first status meeting will be in two weeks and I’ll get the recurring meetings on our calendars.”

Kickoff Meeting PowerPoint Format

If you will use a PowerPoint deck for your kickoff meeting, here is a format to consider as a starting point. TIP: Copy and paste content from your Project Charter to create your slides.

RECOMMENDED SLIDES



1. Title Slide
2. Agenda
3. Introductions (if desired)
4. Background
5. Project Description
6. Project Organization (Names of the entire project team)
7. Business Need/Financial Justification, if needed
8. Objectives/Success Criteria
9. Project Schedule
10. Next Steps

KICKOFF MEETING SAMPLE POWERPOINT PRESENTATION

GATHER REQUIREMENTS

Clear, actionable requirements lay the foundation for a successful project. When you take the time to understand what stakeholders truly need, your team is positioned to deliver the right solution with confidence. Strong requirements are one of the best ways to prevent project delays and missteps. It's often the role of the project team to lead this effort by working closely with the sponsor, employees/users, project team, and subject matter experts. The process below can help guide that work.

FOUR STEPS TO DEFINE AND MANAGE REQUIREMENTS

1. Define the high-level requirements.

Do this with the sponsor and/or steering committee while writing the Project Charter.

- Start with the "why." What problem are we solving, and who benefits?
- Capture the broad vision and key requirements

2. Elicit specific requirements.

Do this with employees/users and subject matter experts.

- Meet with users directly to understand how this project impacts their daily work
- Ask "why," "what," and "how" to uncover what your users really need
- Use tools like interviews, workshops, observations, and document review

3. Define and prioritize the requirements.

Do this with the project team and subject matter experts.

- Distill ambiguous input from users into specific, categorized, and verifiable requirements
- Use a consistent format (e.g., Waterfall list, Agile user stories)
- Prioritize using the MoSCoW method

- Flag unrealistic or out-of-scope items

4. Validate and approve the requirements.

Do this with the sponsor and/or steering committee.

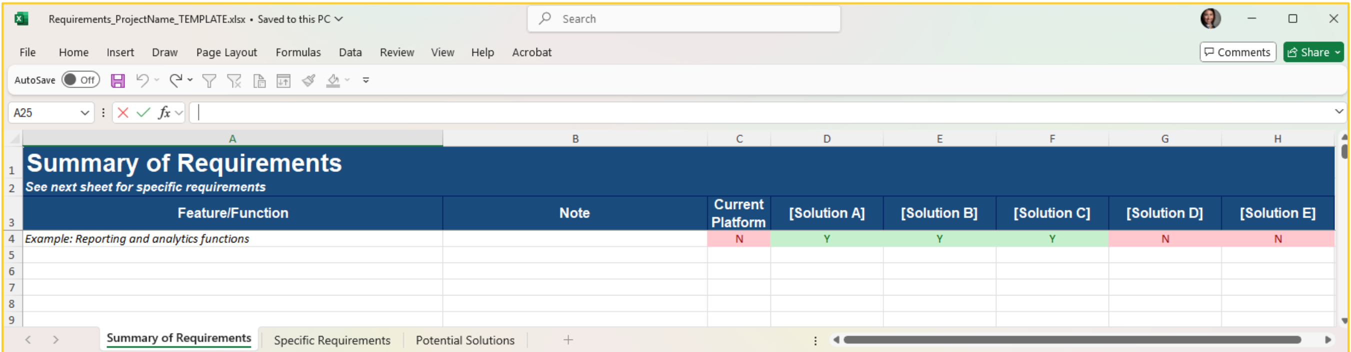
- Present the final list of detailed requirements
- Confirm prioritization and constraints
- Iterate as needed until there is agreement

Requirements Gathering Excel File Format

If you use Excel to define and manage requirements, here is a format to consider.

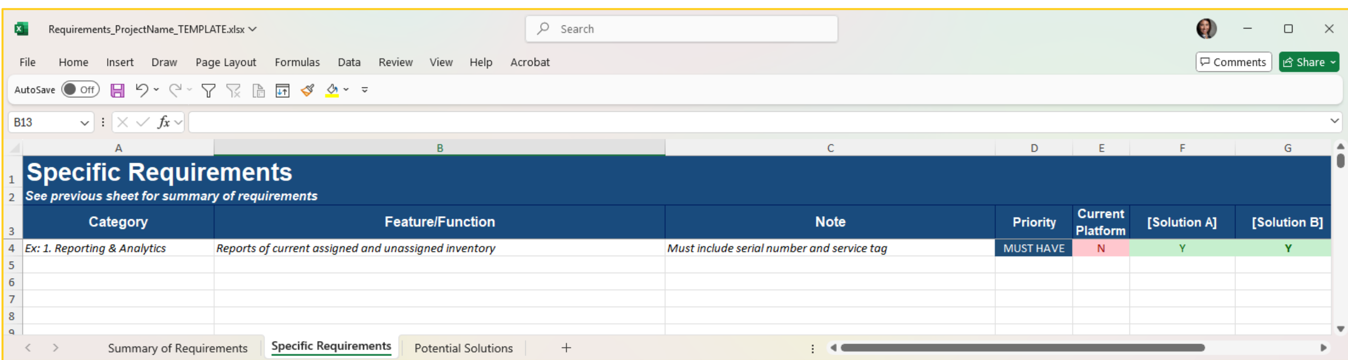
Tab 1: Summary of Requirements

List the features/functions that are required, along with any notes. *Example: Reporting and analytics functions.* Use the columns to denote which solutions include those features/functions.



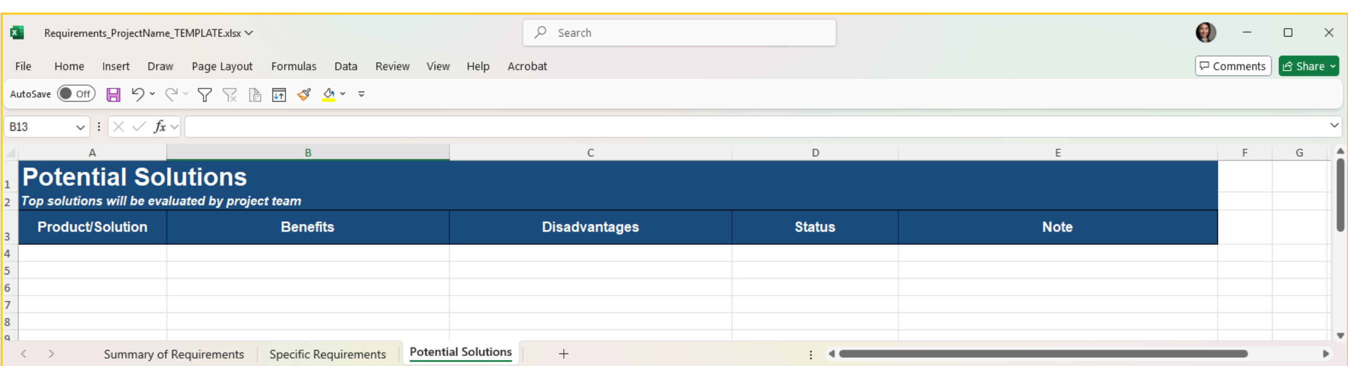
Tab 2: Specific Requirements

For each category, like Reporting & Analytics, list the specific features/functions required, notes, and priority. *Example: Reports of current and assigned and unassigned inventory. Must include serial number and service tag. Must Have.* Use the columns to denote which solutions have those specific features/functions.



Tab 3: Potential Solutions

Set up these columns: Product/Solution, Benefits, Disadvantages, and Status. Then work with the project team to evaluate the solutions.



Part 3:

EXECUTE YOUR PROJECT

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KEY ACTIVITIES OF THE EXECUTION PHASE

View a short tutorial: Execution Phase Tips

Monitor progress, keep track of the calendar and milestones

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.

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

3 **Lead status meetings.**
Meeting duration and frequency will vary by project.

4 **Lead standup meetings as needed.**
These are typically short daily meetings (15 min).

Manage the project

5 **Identify new activities or adjustments to the plan.**
Watch out for scope creep (new scope added after the project starts).

6 **Monitor risks.**
Quickly address any risks.

7 **Monitor budget, if required.**
Track project costs.

Communicate the status of your project

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 steering committee and stakeholders.

Go Live (Become operational)

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.

3.1

Monitor Your Project

- Monitor Your Project Plan
- Status Meetings
- Standup Meetings
- Status Reports

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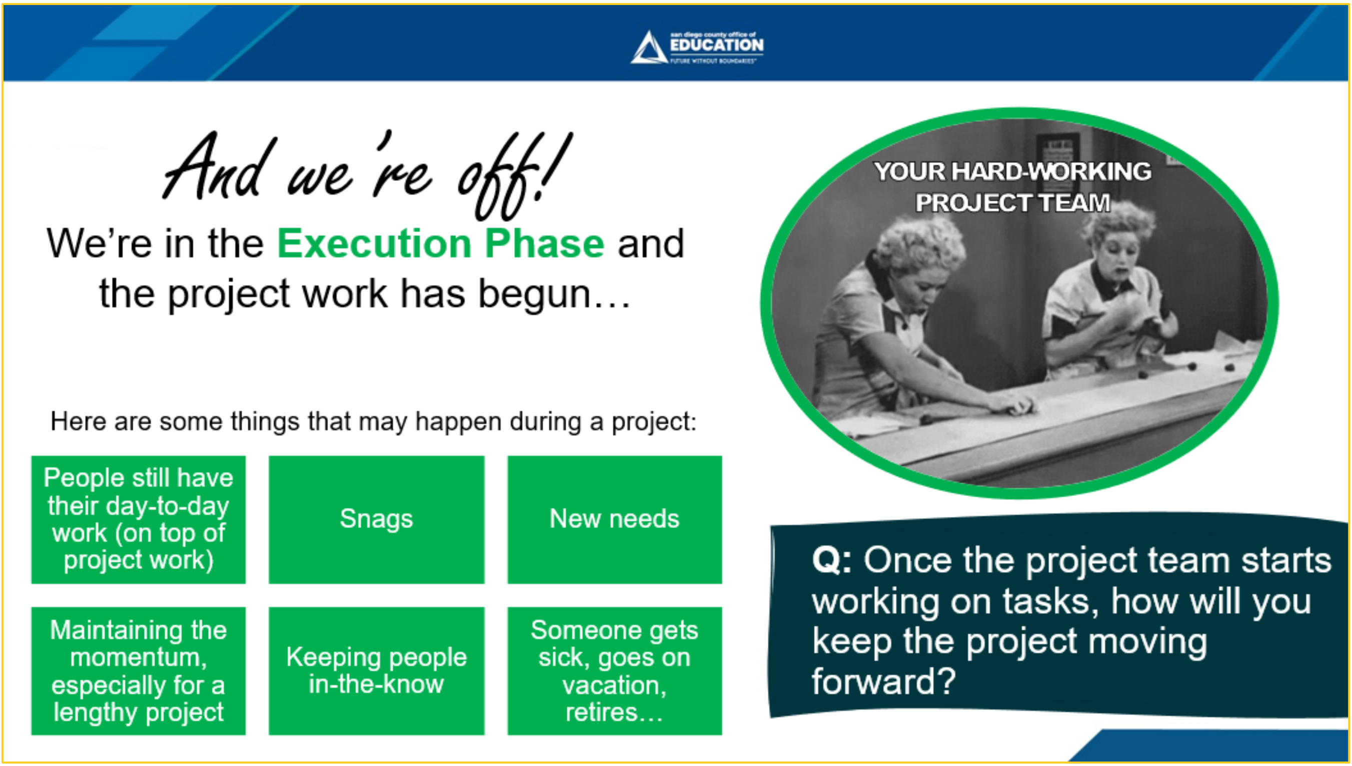
MONITOR YOUR PROJECT PLAN

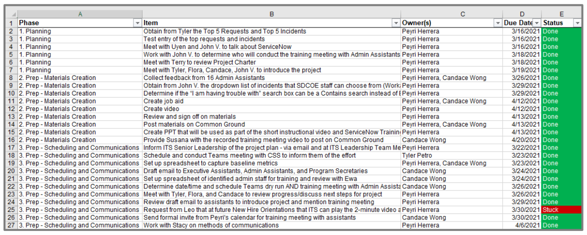


Suggestions for monitoring your project plan:

1. Set up a schedule to check your project plan (daily, every other day, weekly, etc.) and stick to it. Use a recurring calendar event to prompt you.
2. Know what's happening this week, what's coming up next week, and follow up on overdue tasks.
3. Check in with the project team and make sure they know the expectations for updating their tasks in the plan.
4. Track new tasks. Encourage team members to help with this.
5. Track risks and issues. Add a "Risks & Issues" agenda item as part of your status meetings. plan to review weekly.
6. Keep the momentum. Celebrate small wins and make progress visible.

If your project plan is stored in software…

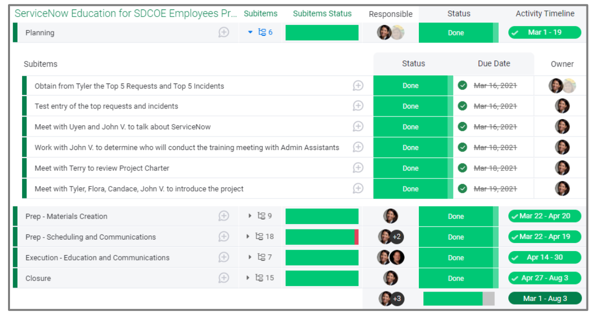
SOFTWARE TIPS



	A	B	C	D	E
1	Phase	Item	Owner(s)	Due Date	Status
2	1. Planning	Obtain from Tyler the Top 5 Requests and Top 5 Incidents	Peyri Herrera	3/16/2021	Done
3	1. Planning	Test entry of the top requests and incidents	Peyri Herrera	3/16/2021	Done
4	1. Planning	Meet with Uyen and John V. to talk about ServiceNow	Peyri Herrera	3/16/2021	Done
5	1. Planning	Work with John V. to determine who will conduct the training meeting with Admin Assistants	Peyri Herrera	3/18/2021	Done
6	1. Planning	Meet with Terry to review Project Charter	Peyri Herrera	3/18/2021	Done
7	1. Planning	Meet with Tyler, Flora, Candace, John V. to introduce the project	Peyri Herrera	3/19/2021	Done
8	2. Prep - Materials Creation	Collect feedback from 16 Admin Assistants	Peyri Herrera, Candace Wong	3/26/2021	Done
9	2. Prep - Materials Creation	Obtain from John V. the dropdown list of incidents that SDCOE staff can choose from (Work	Peyri Herrera	3/29/2021	Done
10	2. Prep - Materials Creation	Determine if the "I am having trouble with" search box can be a Contains search instead of E	Peyri Herrera	3/29/2021	Done
11	2. Prep - Materials Creation	Create job aid	Peyri Herrera, Candace Wong	4/12/2021	Done
12	2. Prep - Materials Creation	Create video	Peyri Herrera	4/12/2021	Done
13	2. Prep - Materials Creation	Review and sign off on materials	Peyri Herrera	4/13/2021	Done
14	2. Prep - Materials Creation	Post materials on Common Ground	Peyri Herrera, Candace Wong	4/13/2021	Done
15	2. Prep - Materials Creation	Create PPT that will be used as part of the short instructional video and ServiceNow Trainin	Peyri Herrera	4/13/2021	Done
16	2. Prep - Materials Creation	Provide Susana with the recorded training meeting video to post on Common Ground	Candace Wong	4/20/2021	Done
17	3. Prep - Scheduling and Communications	Inform ITS Senior Leadership of the project plan - via email and at ITS Leadership Team Me	Peyri Herrera	3/22/2021	Done
18	3. Prep - Scheduling and Communications	Schedule and conduct Teams meeting with CSS to inform them of the effort	Tyler Petro	3/23/2021	Done
19	3. Prep - Scheduling and Communications	Set up spreadsheet to capture baseline metrics	Peyri Herrera, Candace Wong	3/23/2021	Done
20	3. Prep - Scheduling and Communications	Draft email to Executive Assistants, Admin Assistants, and Program Secretaries	Candace Wong	3/24/2021	Done
21	3. Prep - Scheduling and Communications	Set up spreadsheet of identified admin staff for training and review with Ewa	Candace Wong	3/24/2021	Done
22	3. Prep - Scheduling and Communications	Determine date/time and schedule Teams dry run AND training meeting with Admin Assista	Candace Wong	3/26/2021	Done
23	3. Prep - Scheduling and Communications	Meet with Tyler, Flora, and Candace to review progress/discuss next steps for project	Peyri Herrera	3/26/2021	Done
24	3. Prep - Scheduling and Communications	Review draft email to assistants to introduce project and mention training meeting	Peyri Herrera	3/29/2021	Done
25	3. Prep - Scheduling and Communications	Request from Leo that at future New Hire Orientations that ITS can play the 2-minute video a	Peyri Herrera	3/30/2021	Stuck
26	3. Prep - Scheduling and Communications	Send formal invite from Peyri's calendar for training meeting with assistants	Candace Wong	3/30/2021	Done
27	3. Prep - Scheduling and Communications	Work with Stacy on methods of communications	Peyri Herrera	4/6/2021	Done

Excel/Sheets

- Filter by due date
- Use color-coded statuses to flag progress
- Use conditional formatting or formulas to highlight past-due items
- Add a "Change Log" tab for any updates



Project Management Software

- Set automated alerts/emails to remind team members (and you, if desired) of upcoming due dates. Example: 3 days from now Task X is due
- Use the calendar view to better see tasks
- Create an "Overdue Tasks" view
- Use @mentions and in-task comments to provide updates
- Create a dashboard with widgets like progress bars and charts to indicate progress

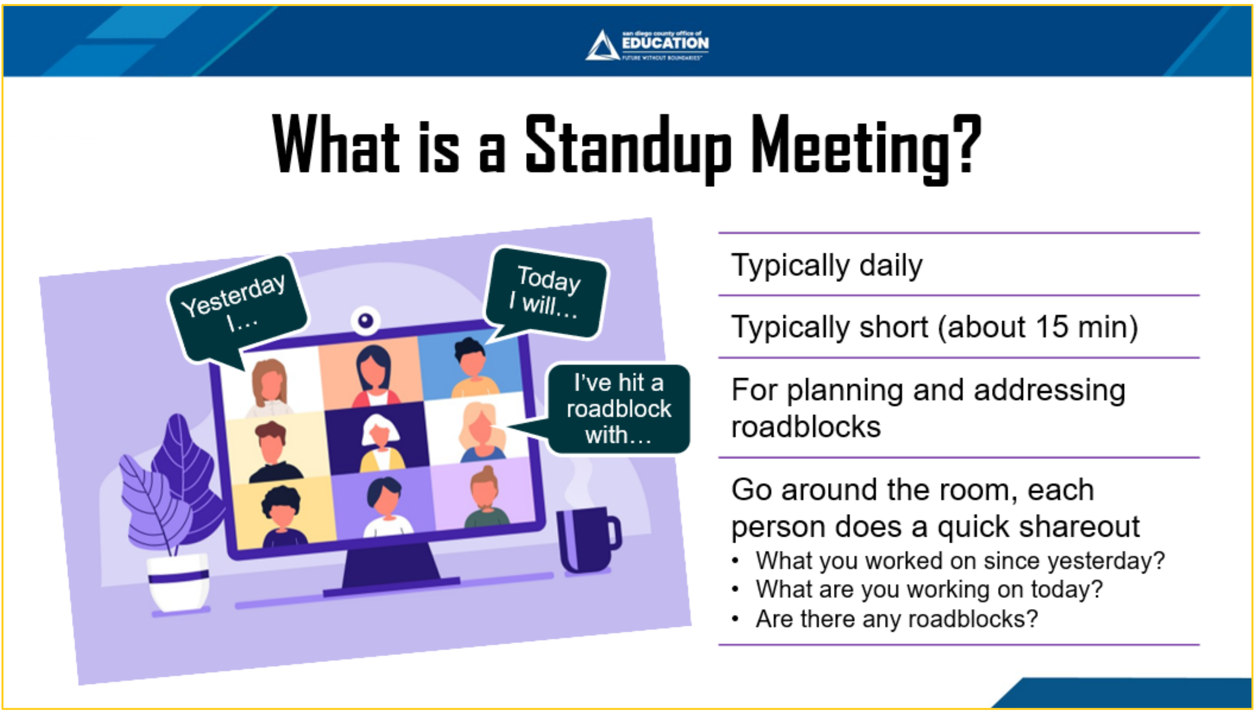
What to do when things don't go as planned:

- **If a critical issue pops up…**
  – Talk to the Project Sponsor (and Steering Committee, if you have one) as soon as you are aware of anything that impacts scope, time, or cost
  – *Examples:* Scope creep, scheduling changes, issues that need resolution, purchasing delays, etc.
- **If your Sponsor decides on a change…**
  – Make a note on the status report and inform everyone on the Project Team
  – Update your project plan, documents, communications, etc.
  – Inform the stakeholders, if necessary
- **Reminder!**
  – Always be on the lookout for potential risks
  – Discuss at status meetings and encourage staff to bring potential risks forward

STATUS MEETINGS

View a short tutorial: Status Meetings Tips

STANDUP MEETINGS



A standup meeting is typically a short daily meeting for planning. The format allows everyone to hear the current progress of every team member to address any roadblocks. The goal is to keep it quick and keep the progress moving.

For some projects, or some portions of projects, you might decide that standup meetings will help. For example, perhaps you are now in the testing phase of your project, and there is a lot of new information popping up and it's more effective to get together to plan and address issues. A daily 15-minute standup meeting could help.

Standup Meeting Format:

If you conduct a standup meeting, ask all attendees to be prepared to state:

- What they've done since yesterday
- What they're working on today
- If there are any roadblocks or "blockers"

It's a quick whip around the room and can be very beneficial to quickly addressing obstacles.

Scenario:

USING DAILY STANDUPS TO STAY AGILE DURING YUBIKEY TESTING

Project	Rolling out YubiKeys to all employees for Multi-Factor Authentication (MFA)
Scenario	A project team is in the testing phase of their MFA project. Their 5-person team is focused on making sure YubiKeys work across different applications, documenting any issues, correcting them, and retesting. There's a lot of new information every day, and things are moving fast.
Decision to incorporate standup meetings	Their project manager decides to hold a daily 15-minute standup meeting to keep everyone aligned and agile. It's scheduled at the beginning of the workday. Everyone stays standing (when the standup meeting is conducted in person) to keep it brief and efficient, thus the name "standup."
How everyone reports out (the "whip around the room")	• **Network Ned:** "Yesterday, I tested YubiKeys with our VPN. Today, I'll try with remote desktop. My roadblock is that I need a test account from Help Desk Helena." • **Help Desk Helena:** "I've been prepping test users. Today, I'll get Network Ned the account, then continue prepping the test users. No blockers." • **Systems Syd:** "Working on Active Directory sync with the YubiKey system. Nothing in my way." • **Security Selena:** "Yesterday I found an issue with logging. I'm working with vendor support. My only blocker is waiting on their reply." • **Project Manager Presley:** "Thanks, everyone. I jotted down today's roadblocks. Security Selena, let's stick around for 5 minutes so we can agree on how long we can wait on the vendor before I need to escalate this. Let me know if you need anything. Otherwise, see you at tomorrow's standup."
Benefits the team notices	• **Fast decisions.** No need to wait for the next full team status meeting. • **Team accountability and visibility.** Everyone knows who's doing what. • **Quick roadblock removal.** Issues don't sit for days. • **Momentum.** Testing continues without delay.

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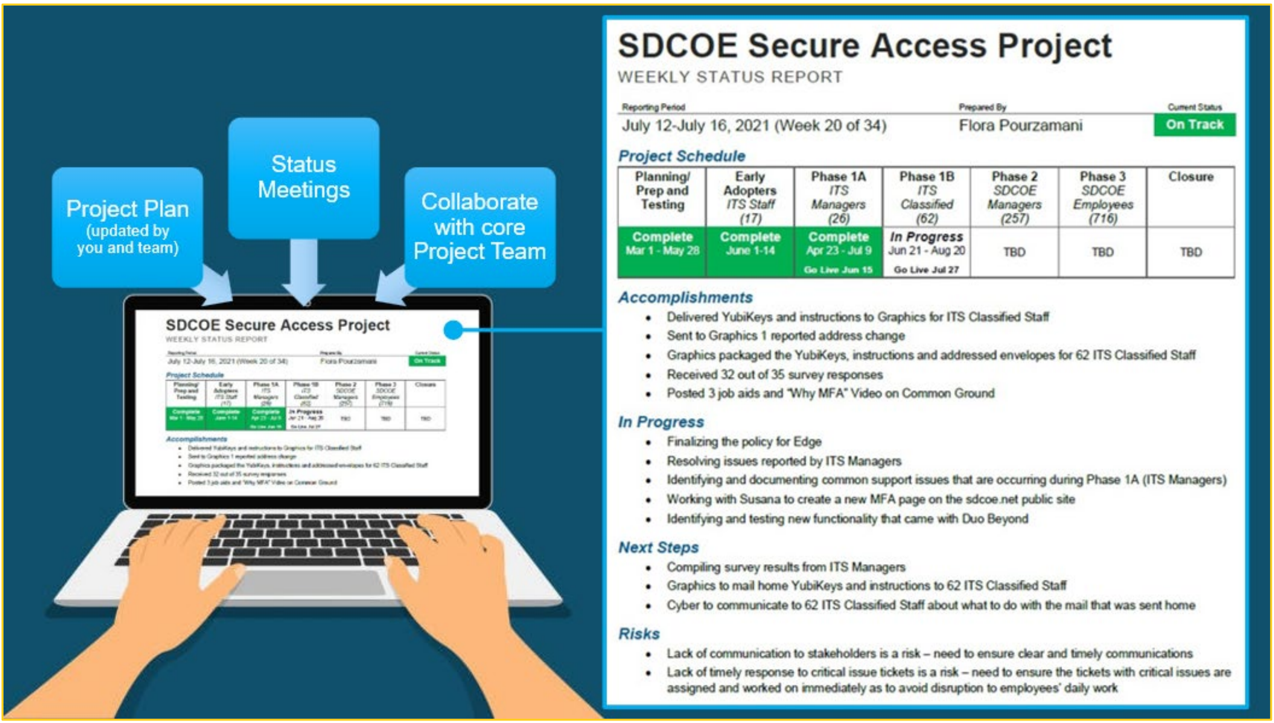
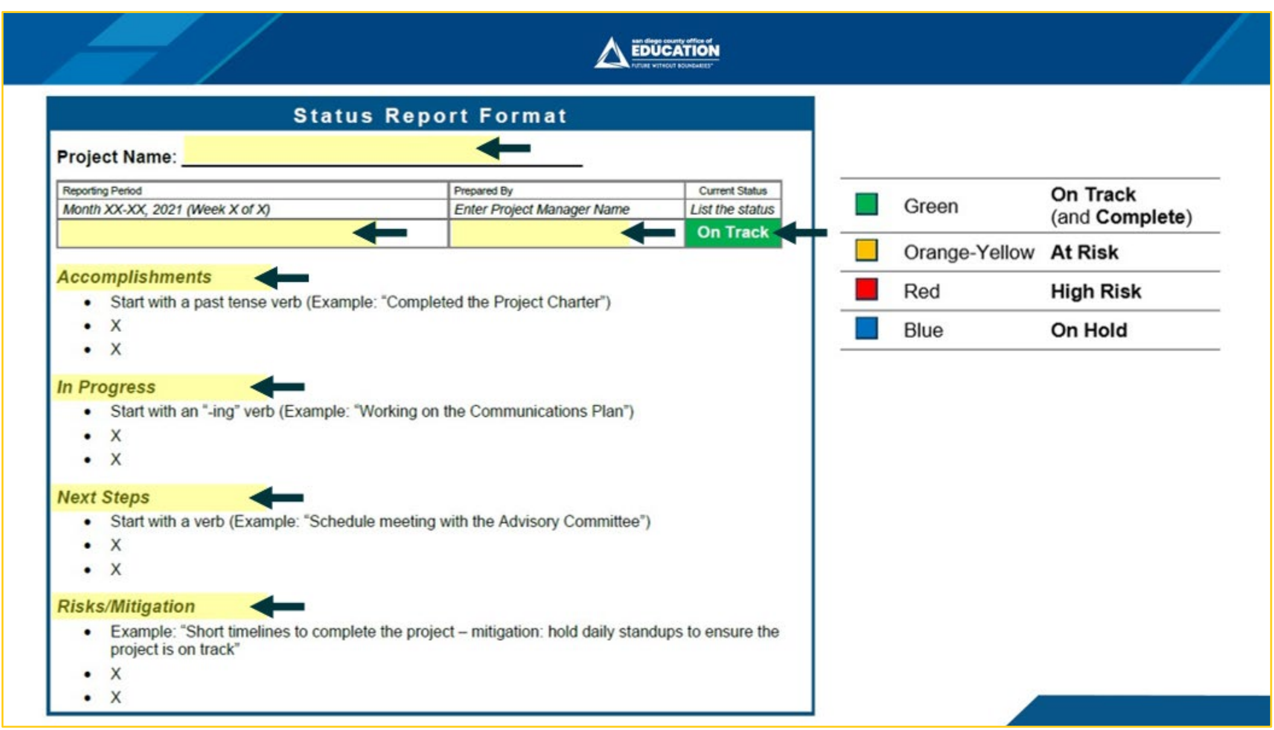
STATUS REPORTS

View a short tutorial: [Status Reports Tips]





Suggested Status Report Components

Filename

Use a naming convention that helps you and the reader know which project and timeframe the status report is for

- Adobe Sign Implementation Project Status Report 04-08-22 WAVE 2, WEEKS 1-2.docx
- Adobe Sign Implementation Project Status Report 04-08-22 WAVE 2, WEEKS 1-2.pdf
- Adobe Sign Implementation Project Status Report 04-22-22 WAVE 2, WEEKS 3-4.docx
- Adobe Sign Implementation Project Status Report 04-22-22 WAVE 2, WEEKS 3-4.pdf

Project Name

Include the Project Name on your status report.

Reporting Period

Include the reporting period. *Example: April 11-22, 20XX (Weeks 3-4 of 10)*

Prepared By

Type your name (the person serving in the role as Project Manager)

Current Status

Provide the current status of the project. You can use the RAG rating (Red, Amber, Green). Blue can be used to indicate if a project is put on hold.

	Green	**On Track** (and **Complete** for the final status report)
	Orange-Yellow	**At Risk**
	Red	**High Risk**
	Blue	**On Hold**

Project Schedule / Timeline

Include a timeline to show where the project is in relation to the entire project. You can create a simple table for this purpose.

Project Schedule

Planning	Wave 1: HR and ITS	Wave 2: BUS SERV and ADMIN	Wave 3: LLS, INNOV, and SS&P (JCCS)	Closure
Done July - Oct 2021 *20 weeks*	Done Nov 2021 - Mar 2022 *25 weeks*	In Progress Apr - May 2022 *10 weeks*	June - July 2022 *10 weeks*	August 2022 *2 weeks*

Body

- **Accomplishments:** Use the Accomplishments section to showcase all the great work that has been completed during this reporting period. Start with a past tense verb, like “Completed the Project Charter.” If something major happened, put that first in the list.
- **In Progress:** This is what the Project Team is currently working on and it’s not done yet. Start with an “-ing” verb, like “Working on the Communications Plan.”
- **Next Steps:** These are the things that are right around the corner. Start with a verb, like “Schedule a meeting with the Advisory Committee.”
- **Risks/Mitigation:** List anything current or new that might possibly impact the delivery or quality of your project. Include your mitigation strategu. For example: “Short timelines to complete the project. The mitigation is to hold daily standups to ensure the project is on track.”

Appendix

If appropriate and/or valuable, include any appendices at the end of the report. For example, if the project is to develop an app or update a software feature, you could include a screenshot.

See the sample on the next page. A Status Report template (Word) is available for download.

Adobe Sign Implementation Project

BI-WEEKLY STATUS REPORT

Reporting Period	Prepared By	Current Status
April 11-22, 2022 (Wave 2, Weeks 3-4 of 10)	Reesa Fickett	**On Track**

Project Schedule

Planning	Wave 1: HR and ITS	Wave 2: BUS SERV and ADMIN	Wave 3: LLS, INNOV, and SS&P (JCCS)	Closure
Done July - Oct 2021 *20 weeks*	**Done** Nov 2021 - Mar 2022 *25 weeks*	**In Progress** Apr - May 2022 *10 weeks*	June - July 2022 *10 weeks*	August 2022 *2 weeks*

Accomplishments

- Published a *Common Ground* banner ad, a *Newsroom* article, and *This Week* email to inform all SDCOE full-time employees about the launch of Adobe Sign and implementation next steps on Monday, April 11
- Completed a demo of the MS Outlook and Teams integration with Adobe Sign to the ITS Senior Leadership team on Thursday, April 14
- Provisioned 900+ full-time employees with Adobe Sign enterprise accounts

Wave 2: BUS SERV and ADMIN

- **BUS SERV**:
  - Discussed forms for conversion with the Division Lead (Sakura) on Monday, April 18
  - Conducted a meeting with Business Services' Executive Steering Committee on Friday, April 22 to identify roles and responsibilities
- **ADMIN**:
  - Conducted a training with Group Admins and Power Users on Tuesday, April 19
  - Scheduled an additional training on web forms on Wednesday, April 27

In Progress

- Converting Business Services and Administration forms to Adobe Sign forms/web forms *(see Appendix)*
- Working with Division Leads to encourage employees to start using their Adobe Sign enterprise accounts
- Promote the *SDCOE Learning Hub* > *Adobe Sign website*

Next Steps

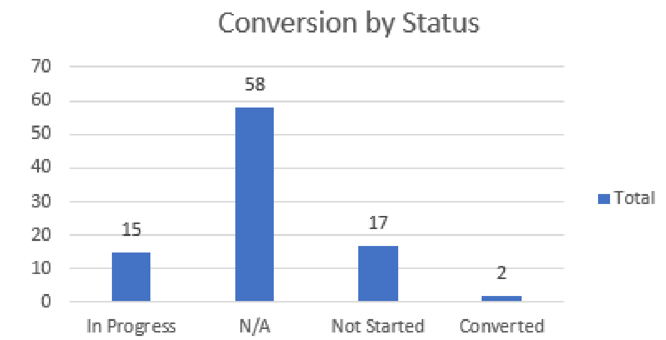
- Prepare for additional training on web forms with Group Admins and Power Users from Administration
- Test Business Services and Administration forms before use by their divisions
- Plan for rollout of the MS Teams and Outlook integrations with Adobe Sign

Risks/Mitigation

- Short timelines to complete the project – mitigation: work with Division Leads to ensure project is on track

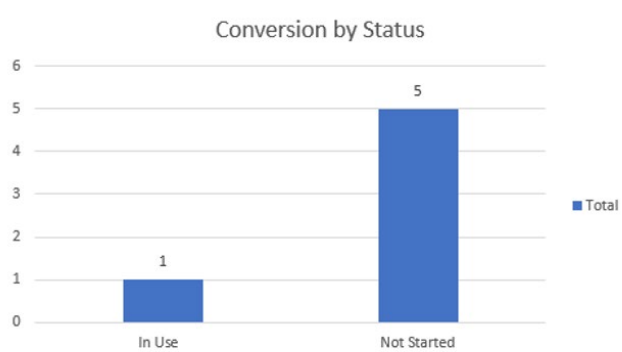
Appendix

I. Current Status of BUS SERV Forms Converted to Adobe Sign



Forms Group by Status	Total
⊟In Progress	**15**
ACH Deletion/Reversal Request	1
Advance Payment form	1
Annual Resolutions Authorized Designated Agents	1
Cancel Employee Warrant Form	1
Contract	1
Contract Amendment	1
Contract Routing Form	1
ICA (Independent Contractor Agreement)	1
ICA Determination	1
Lost/Stolen Check Affidavit - Employee	1
Lost/Stolen Check Affidavit - Vendor	1
Referee Agreement	1
Sole Source Purchase	1
Special Services Agreement	1
Wire Administration Request Portal (WARP) - User Access Set-up Sheet	1
⊞N/A	**58**
⊞Not Started	**17**
⊟Converted	**2**
Affidavit of Lost Receipt	1
Petty Cash Reimbursement	1
Grand Total	**92**

II. Current Status of ADMIN Forms Converted to Adobe Sign



Status	Total
⊟Not Started	**5**
Application for Classified School Employee of the Year	1
Honoring Our Own	1
Media Release Form - adult (English/Spanish)	1
Media Release Form - child (English/Spanish)	1
Request for Superintendent to Attend an Event	1
⊟In Use	**1**
Application for Teacher of the Year (TOY)	1
Grand Total	**6**

3.2

The People Side of Projects

- Stakeholder Register
- Communications Plan
- Organizational Change Management (OCM) Strategies for Your Project
- The ADKAR Model for Individual Change
- The Lippitt-Knoster Model for Managing Complex Change
- Power Skills Every Project Professional Needs

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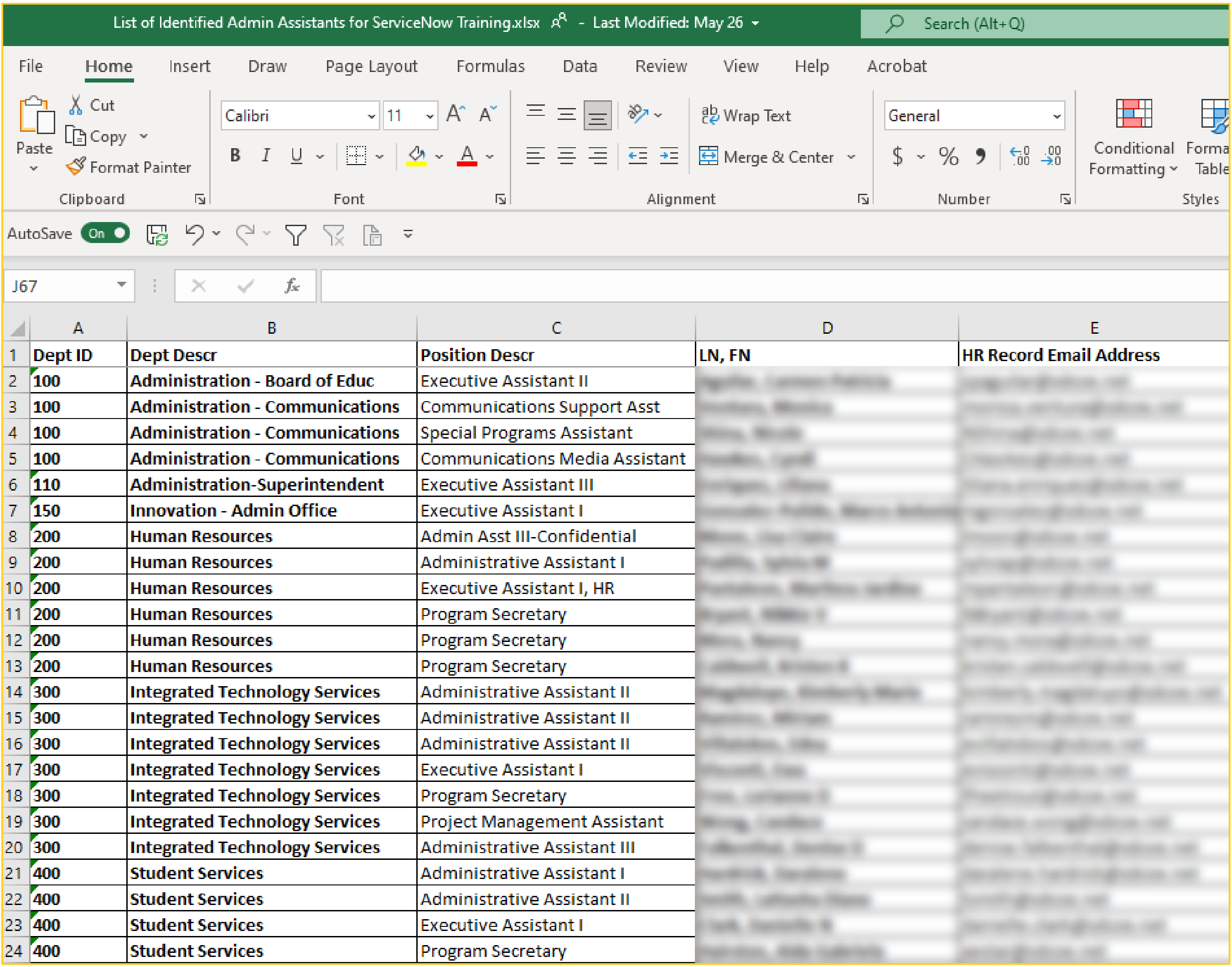
STAKEHOLDER REGISTER



Dept ID	Dept Descr	Position Descr	LN, FN	HR Record Email Address
100	Administration - Board of Educ	Executive Assistant II	[illegible]	[illegible]
100	Administration - Communications	Communications Support Asst	[illegible]	[illegible]
100	Administration - Communications	Special Programs Assistant	[illegible]	[illegible]
100	Administration - Communications	Communications Media Assistant	[illegible]	[illegible]
110	Administration-Superintendent	Executive Assistant III	[illegible]	[illegible]
150	Innovation - Admin Office	Executive Assistant I	[illegible]	[illegible]
200	Human Resources	Admin Asst III-Confidential	[illegible]	[illegible]
200	Human Resources	Administrative Assistant I	[illegible]	[illegible]
200	Human Resources	Executive Assistant I, HR	[illegible]	[illegible]
200	Human Resources	Program Secretary	[illegible]	[illegible]
200	Human Resources	Program Secretary	[illegible]	[illegible]
200	Human Resources	Program Secretary	[illegible]	[illegible]
300	Integrated Technology Services	Administrative Assistant II	[illegible]	[illegible]
300	Integrated Technology Services	Administrative Assistant II	[illegible]	[illegible]
300	Integrated Technology Services	Administrative Assistant II	[illegible]	[illegible]
300	Integrated Technology Services	Executive Assistant I	[illegible]	[illegible]
300	Integrated Technology Services	Program Secretary	[illegible]	[illegible]
300	Integrated Technology Services	Project Management Assistant	[illegible]	[illegible]
300	Integrated Technology Services	Administrative Assistant III	[illegible]	[illegible]
400	Student Services	Administrative Assistant I	[illegible]	[illegible]
400	Student Services	Administrative Assistant II	[illegible]	[illegible]
400	Student Services	Executive Assistant I	[illegible]	[illegible]
400	Student Services	Program Secretary	[illegible]	[illegible]

In your Project Charter you listed your stakeholders. Depending on your project, you might benefit from a Stakeholder Register, which can be a list of stakeholders in Excel. A Stakeholder Register helps you track and manage the people affected by or involved in your project. It can be as simple or detailed as your project needs.

Why It's Useful:

- Send emails easily to target groups
- Track who needs what
- Customize communication
- Update stakeholders efficiently by phase or group

Suggested Stakeholder Register Components

Basic Columns	1. Name 2. Job Title 3. Department 4. Email Address
Additional Columns **(add what you need)**	Depending on your project, consider adding: 5. Employee Type (e.g., Manager, Staff, Part-Time, etc.) 6. Phase Involved (Group 1, Group 2, Group 3, etc.) 7. Level of Influence or Impact 8. Notes 9. Contacted (Y/N)

Tips:

- Tailor it to your project needs and only include what you'll actually use
- Keep it updated as your project evolves
- Use filters in Excel to quickly sort by department, role, or phase

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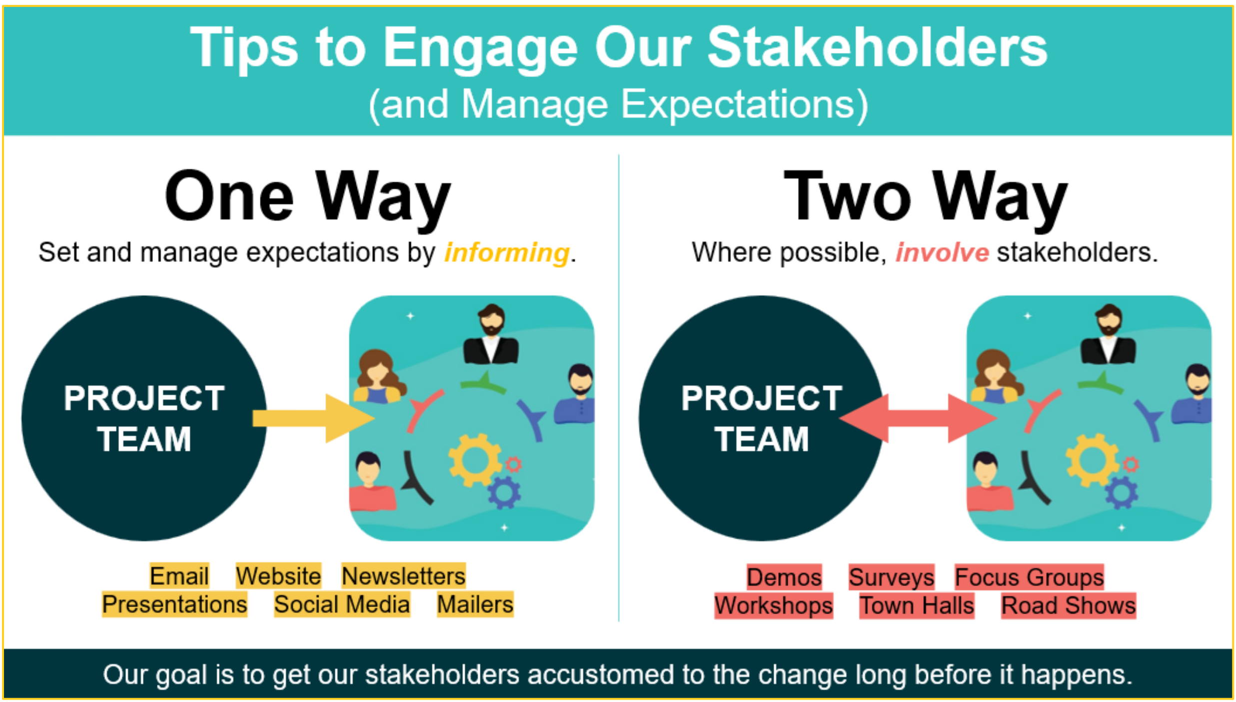
COMMUNICATIONS PLAN

Your Goal: Have ongoing communications with your stakeholders.

Help stakeholders get comfortable with the change long before it happens. Communication with your stakeholders should be ongoing and, when possible, two-way. Early engagement increases trust, reduces resistance, and leads to better outcomes.



Why

When people are informed and involved, they're more likely to support the change. Stakeholders don't like surprises. Ongoing communication ensures they know:

- What's changing
- Why it matters
- How it affects them
- What they need to do

When

Communicate throughout the entire project, not just at the beginning or the end. Key moments might include:

- Project kickoff (if appropriate)
- Milestones
- Testing phases
- Before, during, and after Go Live / Implementation

Create a Communications Plan

Create a plan that includes what you're communicating, how, when, and to whom. You can plan and track your outreach using a simple table like this:

Date	Message	Audience	Delivery Method	Owner/Sender

TIPS:

- Keep your list/table updated and visible to the team (and add them as tasks in your project plan)
- Match your communication style to the audience and stage of the project
- Use two-way communication when feedback or buy-in is critical. Examples include demos, focus groups, town hall meetings, and guided tours.
- Target your messages so they're timely and useful

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SDCOE SECURE ACCESS PROJECT

MFA Communications Plan (Phase 3)

The table below lists the emails we will send to staff for MFA Phase 3.
Note there are two meetings ("Guided Tours") so staff can ask questions.

Date	Message	Audience	Delivery Method	Work with Comm Dept?	Owner (Sender)
10/05/21	**Initial MFA message**	667 SDCOE Staff with copy to 260 SDCOE Managers	Email	Yes	Terry
10/07/21	**Validating addresses and computer type, how will MFA work**	667 SDCOE Staff	Email	Yes	Peyri/Flora
10/12/21	**Support MFA and validate addresses and computer type**	Staff in their division	Email	Yes	Assistant Superintendents
10/18/21 at 7:30	**Reminder to validate addresses and computer type**	Remaining SDCOE Staff who have not validated	Email		Peyri/Flora
10/19/21	**What to do prior to Nov 2 and on/after Nov 2**	667 SDCOE Staff	Email	Yes	Ali/Flora
10/20/21	**MFA Guided Tour #1**	667 SDCOE Staff	Meeting	N/A	Ali/Peyri/Flora
10/21/21	**MFA Guided Tour #2**	667 SDCOE Staff	Meeting	N/A	Ali/Peyri/Flora
10/27/21	**Packets have been sent home and what to do**	667 SDCOE Staff	Email	Yes	Ali
11/01/21	**What to expect on Go Live; what to do if you have not received your packet or the correct YubiKey**	667 SDCOE Staff	Email	Yes	Ali
11/01/21 DAY BEFORE GO LIVE	**Your SDCOE Staff are going live with MFA**	260 SDCOE Managers	Email	Yes	Ali
11/02/21 GO LIVE	**Go Live message and what to do**	667 SDCOE Staff	Email	Yes	Ali
11/16/21	**SDCOE Security Access Survey**	667 SDCOE Staff	Email	Yes	Ali

Comments:

- We will keep Managers informed so they can help their staff with the transition.
- We might need assistance to remind Assistant Superintendents to send their messages.
- The two MFA Guided Tours will be Teams Meetings and will repeat what was shared at the COMET Manager Meeting. Stacy will help promote these events.
- We will track all questions and answers in a separate document and make them available on Common Ground.

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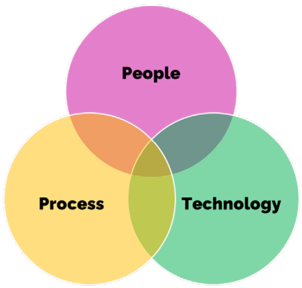
OCM Strategies for Your Project: Cheat Sheet

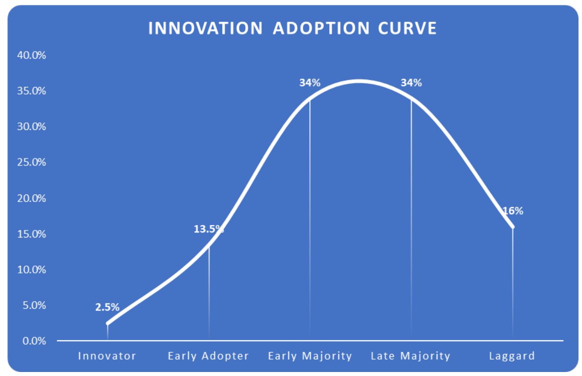
OCM

Organizational Change Management, or OCM for short, is a framework for managing the *people* side of change, to ensure that the impacted employees embrace, adopt, and use the solution.



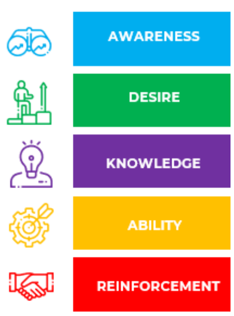
Types of Adopters

In Everett Rogers' book *Diffusion of Innovations 5th* Edition (Free Press, 2005), Rogers places adopters of innovations into five different categories: **Innovator** (2.5%), **Early Adopter** (13.5%), **Early Majority** (34%), **Late Majority** (34%), and **Laggard** (16%).



The ADKAR Model

Prosci is an organization that specializes in change. Its *ADKAR Model* outlines what's required to bring individuals along on the change journey.



The Lippitt-Knoster Model

The *Lippitt-Knoster Model for Managing Complex Change* shows what is needed for change to occur successfully.

Reasons Change Doesn't Happen

The obstacles to technology adoption can be many and various, covering a broad spectrum of areas including:

- Poor communication
- Fear
- Training
- Lack of executive support
- Conflicting views of change
- Lack of confidence
- Budgetary constraints

Adoption Techniques

When planning and executing your project, the following techniques can be selected and applied with the intention of being impactful on all the different types of adopters. (Source: InfoTech)

	CATEGORY 1 Innovator	CATEGORY 2 Early Adopter	CATEGORY 3 Early Majority	CATEGORY 4 Late Majority	CATEGORY 5 Laggard
Proof of Concepts	★	★	–	↓	↓
Train the Trainer	★	★	–	↓	↓
Contests	★	★	–	↓	↓
Marketing	–	★	★	↓	↓
Incentives	↓	★	★	–	↓
Herd Mentality	↓	–	★	★	↓
Group Training	↓	–	★	★	↓
Champions	↓	↓	★	★	–
One-on-One	↓	↓	–	★	★
Force	↓	↓	–	★	★

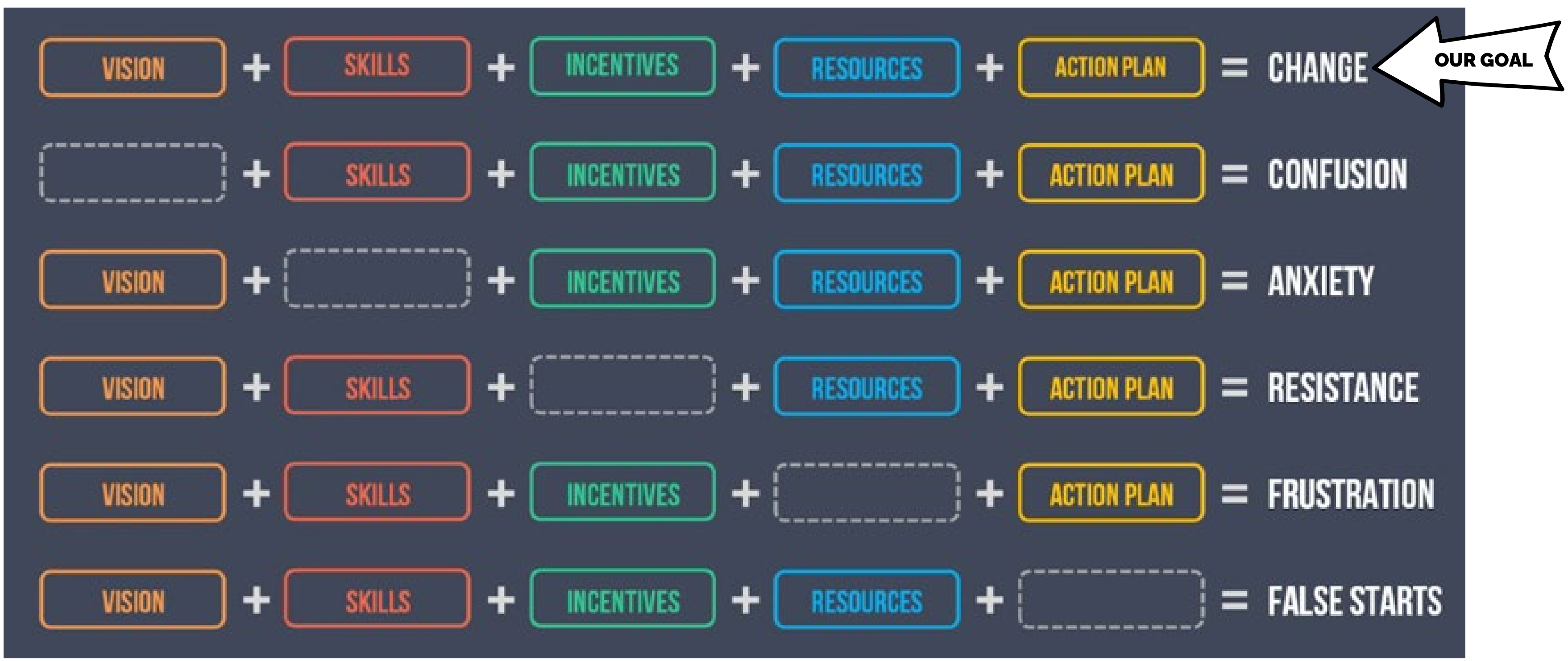
The ADKAR Model

AWARENESS	Awareness means more than just knowing there's a change occurring, it means understanding the need for change.
DESIRE	To achieve Desire, there needs to be motivation, whether it be from an organizational perspective or personal.
KNOWLEDGE	Knowledge on how to train during the transition and knowledge on being effective after the change are required.
ABILITY	Ability is not knowledge. Knowing how to do something doesn't necessarily translate to having the skills to do it.
REINFORCEMENT	Without Reinforcement there can be a tendency to revert.

Source: [Prosci]

- Prosci is an organization that specializes in change. Its ADKAR model outlines what's required to bring individuals along on the change journey.
- The Prosci ADKAR® Model is based on one simple truth: *Organizational change happens one person at a time.*
- The ADKAR Model is the industry standard for change management practitioners worldwide.

The Lippitt-Knoster Model for Managing Complex Change

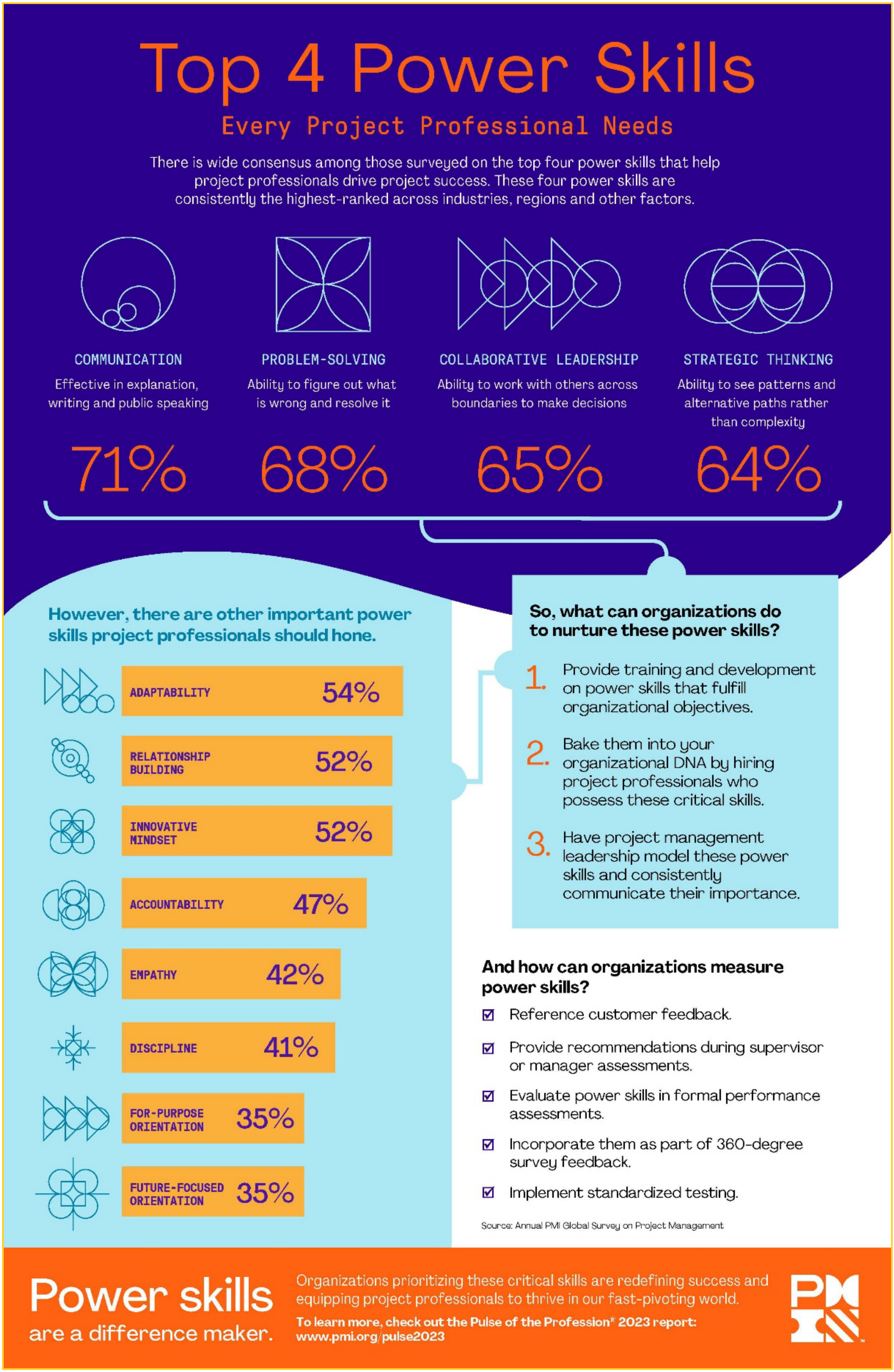


- The Lippitt-Knoster Model for Managing Complex Change is an excellent tool both to plan change, as well as to diagnose issues when a project is already happening.
- It provides a consolidated map of all the elements needed in a project.
- This is one of the SDCOE EPMO team's favorite models because it is so easy to understand.

Power Skills Every Project Professional Needs

Communication, Problem Solving, Collaborative Leadership, Strategic Thinking

Source: PMI. Power skills are abilities and behaviors that facilitate working with others. These abilities enable project professionals to succeed in the workplace. They are also referred to as “soft skills” or “interpersonal skills” by some individuals and organizations.



Learn more: https://www.pmi.org/learning/thought-leadership/power-skills

3.3

Prepare for Go Live

- Go Live Checklist
- Pre Go Live Rally

GO LIVE CHECKLIST

View a short tutorial: Go Live Tips

Planning for Go Live

Go Live means the system, service, or product is now live and in use. Success at Go Live takes planning, coordination, and communication.

Your goal: The system/solution is working, employees are prepared, support is ready, and risks are minimized.

Ask:

- Will the system/solution work under real conditions?
- Are employees/users confident and capable?
- Are we ready to support issues right away?
- Are there risks we haven't anticipated?

Remember: A successful Go Live is not just a technical launch, it's also a human transition. Focus just as much on your people as you do on the system.

GO LIVE CHECKLIST

Adapt this checklist to meet your needs.

Testing and Sign Off

1. ☐ Has user acceptance testing been completed?
2. ☐ Have all issues related to going live been resolved?
3. ☐ Has the appropriate party (Project Sponsor or other) given acceptance to proceed with moving the delivered system, service or product into production? NOTE: Consider if you need a Go/No Go Meeting.
4. ☐ If applicable, has your Change Control Board been notified?
5. ☐ Do we have a backout plan, if needed?

Support Team

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

Training & Communication

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

How to Run a Go/No Go Meeting

Invite: Any decision makers for your project

What to Consider:

- Are all testing outcomes acceptable? Are critical issues resolved?
- Are stakeholders informed and trained?
- Are we ready? Is the team prepared for Day 1 support?
- Do we have a backout plan, if needed?

Decide if it's a "Go" or a "No Go":

- If everyone confirms readiness, it's a "Go" (proceed)
- If there are lingering concerns or showstoppers, it's a "No Go" (reschedule and resolve)

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PRE GO LIVE RALLY

What is a Pre Go Live Rally?

A Pre Go Live Rally is a short, focused meeting to bring together everyone involved in Go Live to make sure they are aligned, equipped, and energized for the launch. This is not a typical status meeting. It's a readiness rally designed to ensure clarity, confidence, and connection across the team.

Sample agenda:

Pre Go Live Rally for SDCOE Secure Access

Meeting Insights

Organizer	Flora Pourzamani — Sent Thu 10/28/2021 5:34 PM
Time	Monday, November 1, 2021 2:30 PM-3:30 PM
Location	Microsoft Teams Meeting
Response	Accepted Change Response

Purpose: To rally our teams to ensure everyone has what they need and feels ready for Go Live with 659 employees.

Agenda Items:

- Go Live Day expectations for SDCOE Staff
  - Who is this Go Live for?
  - Who's on the support team?
- Different methods SDCOE Staff could contact us for questions and issues:
  - ServiceNow ticket
  - Helpline Number
- Resources on Team MFA (00. GO LIVE Folder) to help you
- Roles and expectations on Nov 2, 3
- Workflow for each support team
  - CSS
  - Cyber
  - Network
  - Services & Solutions
- Who to contact if you have questions
- Questions

Please contact Flora if you have any questions about this meeting.

Benefits:

- Builds shared awareness of Go Live expectations
- Reinforces team roles and responsibilities
- Prepares support staff for how to handle issues
- Surfaces any final questions or gaps
- Increases confidence going into Go Live
- Strengthens cross-team coordination and trust

Part 4:

CLOSE YOUR PROJECT

View a short tutorial:
Closure Phase Tips

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PROJECT CLOSEOUT CHECKLIST

1. Lessons Learned

☐ **Identify and document lessons learned.**

- Gather the project team. Discuss and document: What worked well? Where can we improve? Anything else you want to know?
- Highlight important issues that will help improve the quality, value, 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 Sponsor and other audiences.
- 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 knew) all the details of the project, so don't forget to include a project recap.
- Ask your Sponsor to share a few words.

5. Archive

☐ **Archive project documentation.**

- Archive documents used in the project, including project files, recorded meetings, and your project board (like Monday.com or other software).
- When you sign off with your Project Sponsor, explain what was archived.

6. Sign Off with Sponsor

☐ **Review the project scope, the deliverables, and all the completed closeout items.**

- Ensure 100% satisfaction.

OTHER CLOSEOUT ITEMS, IF NEEDED

- Transfer management of the completed project to the new owner.
- Settle payments.
- Close out with any vendors.

Hooray, you did it!

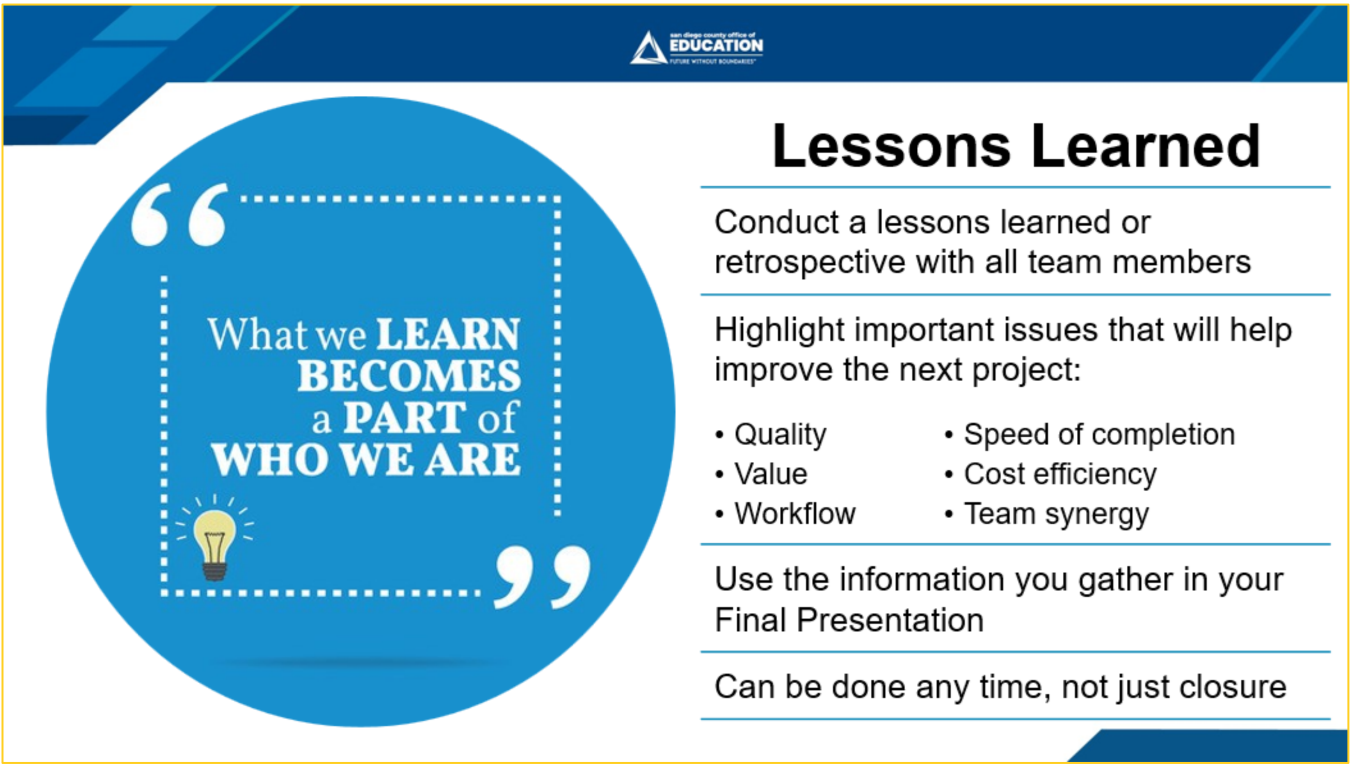
4.1

Assess & Reflect

- Lessons Learned Meeting
- Stakeholder Survey

LESSONS LEARNED MEETING

A Lessons Learned meeting helps your team reflect on the project so you can improve future work. Discuss with the project team members the important issues that will help improve the quality, value, workflow, speed of completion, cost-efficiency, and team synergy of the next project.



THREE QUESTIONS TO ASK THE TEAM:

Q1
What worked well?

Q2
Where can we improve?

Q3
What are you most proud of as a result of this project?
(Something else you'd like to know)

How to Run a Lessons Learned Meeting

Before the Meeting

- Set the tone. Let your team know the meeting is about team improvement and continuous learning.
- Share the guiding questions ahead of time:
  - **What worked well?**
  - **Where can we improve?**
  - **What are you most proud of?**
    (Or, ask something else you'd like to know. Example: **What did you learn?**)
- Send a shared doc so people can prepare or type directly into it, or a survey form to collect information in advance.

During the Meeting

- Remind the team this is about learning and solutions. Encourage full participation. Every perspective matters.
- Facilitate using round-robin or open sharing. If it's help, model a response first before opening it up to others.
- If possible, capture feedback live (whiteboard, chart paper, shared document, etc.).

After the Meeting

- Summarize the discussion. Group the comments into themes, if any.
- Include the highlights or themes in your final report.
- Store the notes in a place where you can access them in the future. Use these insights to improve your next project.

NOTE: For longer projects that have multiple rollouts (Group 1, Group 2, Group 3, for example), consider doing a Lessons Learned after each group for continuous improvement DURING your project.

Sample Lessons Learned Document

COPY/PASTE INTO A WORD DOC (SHARED FILE)

Filename: Lessons Learned for [Project Name]

Lessons Learned for [Project Name]

Team Member Name: _______________

Q1: What worked well?

- X
- X
- X

Q2: Where can we improve?

- X
- X
- X

Q3: What are you most proud of as a result of this project?

- X
- X
- X

Sample Lessons Learned Email / Calendar Invite

COPY/PASTE INTO COMMUNICATIONS TO THE PROJECT TEAM

From: Project Manager
To: Project Team
Subject: Help us reflect - Lessons Learned for [Project Name]

Hi [Insert Team Member Names],

As we wrap up the [Project Name], we're holding a short Lessons Learned meeting. Our goal is to understand what went well, what we can improve, and celebrate what we're proud of. To prepare, please take a few minutes to reflect on these three questions:

1. What worked well?
2. Where can we improve?
3. What are you most proud of?

Here's the Word doc where you can type your responses: [INSERT LINK HERE]

At the meeting we'll refer to the shared doc to discuss our responses. and capture takeaways that will help us for our future projects.

[Closing and Signature]

SERVICENOW EDUCATION FOR SDCOE EMPLOYEES PROJECT

Lessons Learned

ServiceNow Project Team (Peyri, Flora, Tyler, Candace)

Q1: What worked well?

- Reaching out to 16 Admin Assistants and getting feedback drove the content – pain points, suggestions
- Leadership was receptive to the recommended changes and took immediate action
- Partnership between EPMO and CSS
- Working with Stacy Brandt (Communications) for effective and timely communications
- Successful training meeting with 61 participants
- Successful COMET meeting
- Deliverables are clear, helpful, and easy to share/pass to new employees
- The request for a quarterly focus group meeting was one of the unexpected outcomes and a great idea

Q2: Where can we improve?

- Barely anything – this was a very smooth project
- Idea for improvement:
    - Improve the timing of any changes to ServiceNow so they don't occur on the same day as the training

Q3: What are you most proud of as a result of this project?

- The reception of the information, deliverables – high engagement, impactful
- Positive feedback from ITS senior leadership
- Quality materials
- We got a lot done in a short amount of time
- Everything was on track
- The racecar article in the May Inspire newsletter
- Used data to inform the project
- We truly listened to our customers

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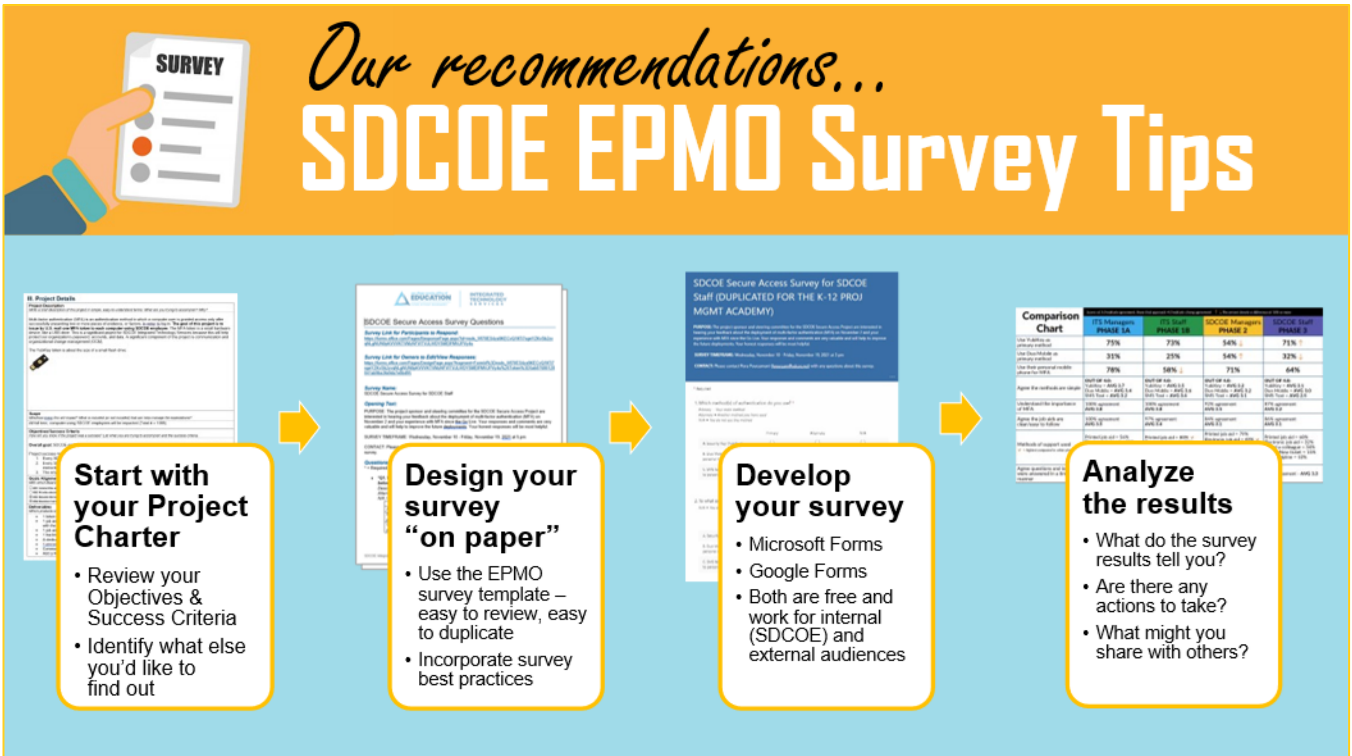
STAKEHOLDER SURVEY



A survey helps you assess project success from your stakeholders' perspective. It helps you measure how well you met your goals, gather insights, and inform your final report. Use a survey after project implementation or after key phases.

Things to Consider Before Creating Your Project Survey

1. **What do I want to learn from this survey?** Think about project success, challenges, or user experience. TIP: Include the Objectives & Success Criteria you listed in the Project Charter.
2. **Who should take the survey?** (Stakeholders, end users, project team, etc.)
3. **Which questions should I ask?** Keep questions clear, neutral, and focused.
4. **Will I include both quantitative (ratings) and qualitative (open-ended) questions?**
5. **How long should the survey be to respect people's time?**
6. **What tool will I use to build the survey?** (Microsoft Forms, Google Forms, etc.)
7. **Who can help me preview/test the survey before sending it out?**
8. **How will I analyze and use the results?**
9. **Who will I share the results with, and how will they be documented?** (Final report, project artifacts, lessons learned, etc.)

Quantitative vs. Qualitative Questions

Quantitative Questions: These are closed-ended questions that give you measurable data, like numbers, ratings, or yes/no answers. Examples: “Rate your satisfaction (1-4)” “Which department are you in? (dropdown list)”

Qualitative Questions: These are open-ended questions that let people share their thoughts in their own words, giving you insights, stories, or suggestions. Examples: ““What could we improve next time?” “Please explain why you selected that value.”

Sample Survey Design Document

COPY/PASTE INTO A WORD DOC

Filename: Survey Design Doc for [Project Name]

Survey Questions for [Project Name]

Links

- Survey Link for Participants to Respond: X
- Survey Link for Owners to Edit/View Responses: X

Opening Text:

- Survey Name: X
- Purpose: X
- Survey Timeframe: X
- Contact: X

Questions

[Insert questions and answer sets here.]

Settings

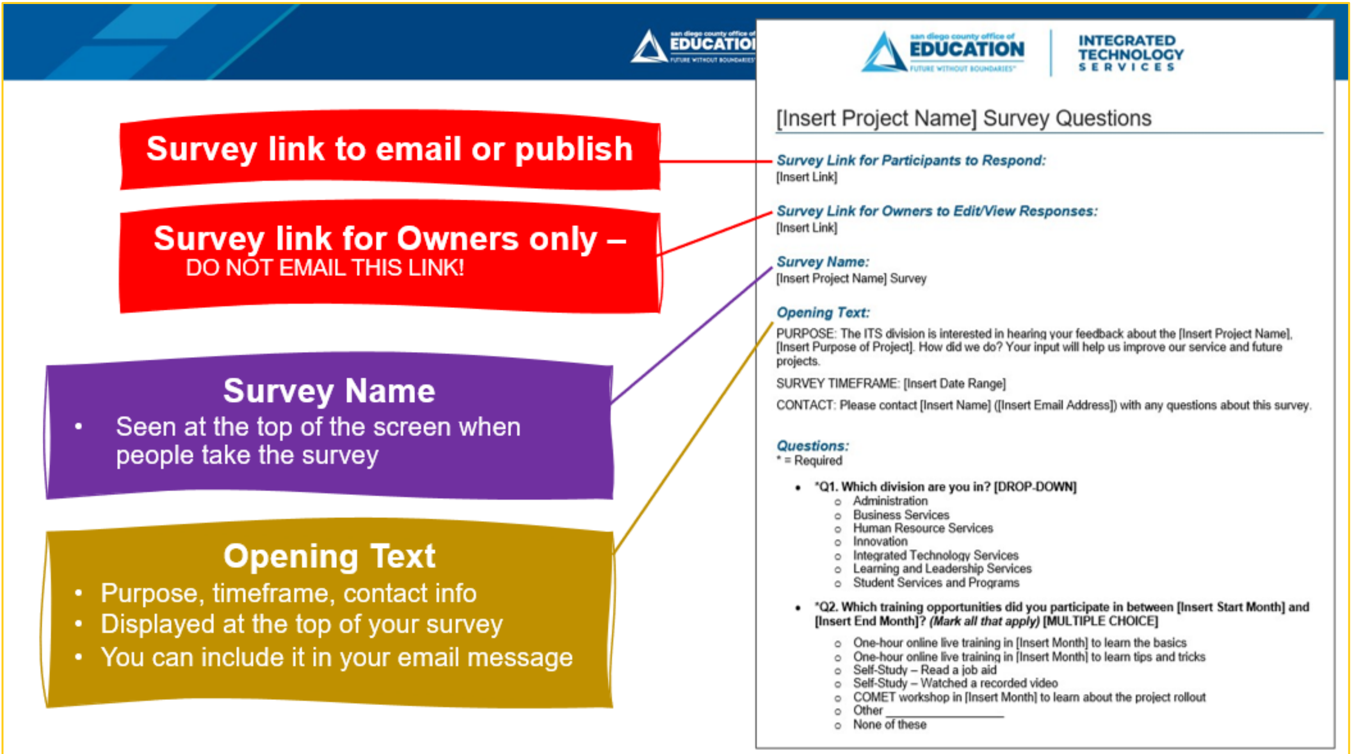
Thank You Message (Upon Submit)

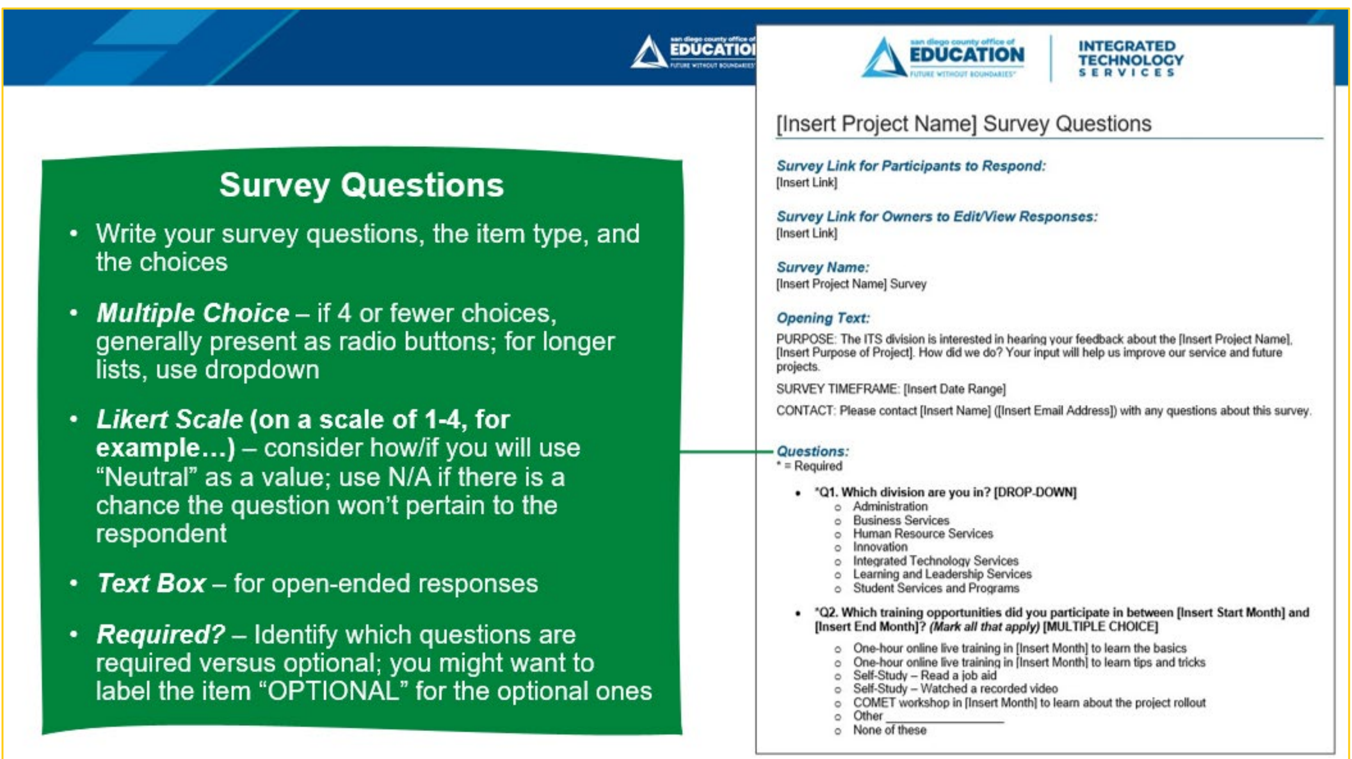
Settings

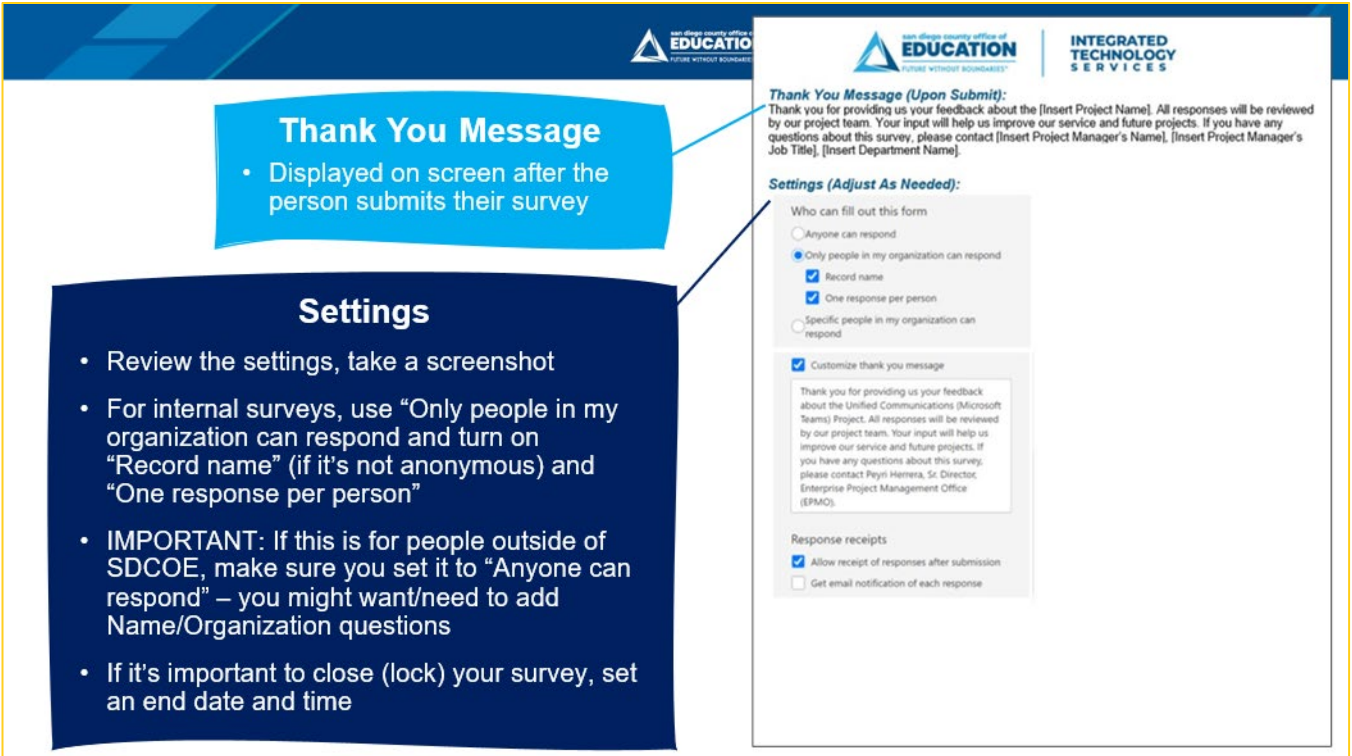
- Only people in my organization can respond = X
- Record name = X
- One response per person = X
- End date = X/XX/XX at X:XX pm
- Allow receipt of responses after submit = X

See the next pages for guidance on how to fill in your survey design document.

Survey Design Document






Thank You Message
• Displayed on screen after the person submits their survey
Settings
• Review the settings, take a screenshot
• For internal surveys, use "Only people in my organization can respond and turn on "Record name" (if it's not anonymous) and "One response per person"
• IMPORTANT: If this is for people outside of SDCOE, make sure you set it to "Anyone can respond" – you might want/need to add Name/Organization questions
• If it's important to close (lock) your survey, set an end date and time
INTEGRATED TECHNOLOGY SERVICES
Thank You Message (Upon Submit):
Thank you for providing us your feedback about the [Insert Project Name]. All responses will be reviewed by our project team. Your input will help us improve our service and future projects. If you have any questions about this survey, please contact [Insert Project Manager's Name], [Insert Project Manager's Job Title], [Insert Department Name].
Settings (Adjust As Needed):
Who can fill out this form
Anyone can respond
Only people in my organization can respond
Record name
One response per person
Specific people in my organization can respond
Customize thank you message
Thank you for providing us your feedback about the Unified Communications (Microsoft Teams) Project. All responses will be reviewed by our project team. Your input will help us improve our service and future projects. If you have any questions about this survey, please contact Peyri Herrera, Sr. Director, Enterprise Project Management Office (EPMO).
Response receipts
Allow receipt of responses after submission
Get email notification of each response

Adobe Sign Implementation Project Survey Questions

Survey Link for Participants to Respond:
https://forms.office.com/X

Survey Link for Owners to Edit/View Responses:
https://forms.office.com/Pages/DesignPageABCDE (DO NOT DISTRIBUTE THIS LINK – ONLY FOR PROJECT TEAM)

Survey Name:
Adobe Sign Implementation Project Survey

Opening Text:
PURPOSE: The ITS division is interested in hearing your feedback about the Adobe Sign Implementation Project to implement the Adobe Sign software across the organization. How did we do? Your input will help us improve our service and future projects.

SURVEY TIMEFRAME: Monday, September 19 - Friday, September 23, 2022 at 5 pm

CONTACT: If you have any specific comments or concerns you would like to address outside of this survey, please contact Reesa Fickett.

Questions
* = Required

- ***Q1. Which division are you in? [DROP-DOWN]**
  - Administration
  - Business Services
  - Human Resource Services
  - Innovation
  - Integrated Technology Services
  - JCCS
  - Learning and Leadership Services
  - Student Services and Programs

- ***Q2. On a scale of 1 star (lowest) to 5 stars (highest), how would you rate the level of support you received during the project? [RATING SCALE: STARS]**

- ***Q3. How did you receive support/information during the project? Mark all that apply. [MULTIPLE CHOICE]**
  - 1:1 meetings with App Dev team (Haison, Ivan, Ruaa, Angela)
  - Division Lead
  - Office Hours
  - Others in your division/unit
  - SDCOE Learning Hub > Adobe Acrobat Sign
  - Status Reports
  - Trainings
  - N/A; I did not receive support/information
  - Other ___________________

- ***Q4. Did you attend Office Hours? [MULTIPLE CHOICE]**
  - Yes
  - No

- **Q5. If you attended Office Hours, please let us know what you found helpful or would like to see improved. (OPTIONAL) [TEXT BOX]** san diego county office of EDUCATION FUTURE WITHOUT BOUNDARIES℠ | INTEGRATED TECHNOLOGY SERVICES

- ***Q6. Adobe Sign... [LIKERT SCALE]**

	4 - Strongly Agree	3 - Agree	2 - Disagree	1 - Strongly Disagree	N/A - Not Applicable
A. Reduces paper waste					
B. Reduces printing costs					
C. Reduces time spent tracking form status					
D. Improves accuracy and compliance					

- ***Q7. What 2 adjectives would you use to describe using Adobe Sign?**
  Please separate the adjectives with a comma. Examples: quick, easy **[TEXT BOX]**

- **Q8. Do you have any additional comments or questions about the project? Is there a particular success story you are willing to share? (OPTIONAL) [TEXT BOX]**

Thank You Message (Upon Submit):

Thank you for providing us your feedback about the Adobe Sign Implementation Project. All responses will be reviewed by our project team. Your input will help us improve our service and future projects. If you have any questions about this survey, please contact Reesa Fickett, Sr. Project Manager, Enterprise Project Management Office (EPMO).

Settings

- Only people in my organization can respond = YES
- Record name = YES
- One response per person = YES
- End date = 9/23/22 at 5 pm
- Allow receipt of responses after submit = YES

4.2

Final Report / Presentation

- Final Report / Presentation

FINAL REPORT / PRESENTATION

Your Final Report Presentation is your chance to tell the story of your project…what you set out to do, what you accomplished, what you learned, and what's next.

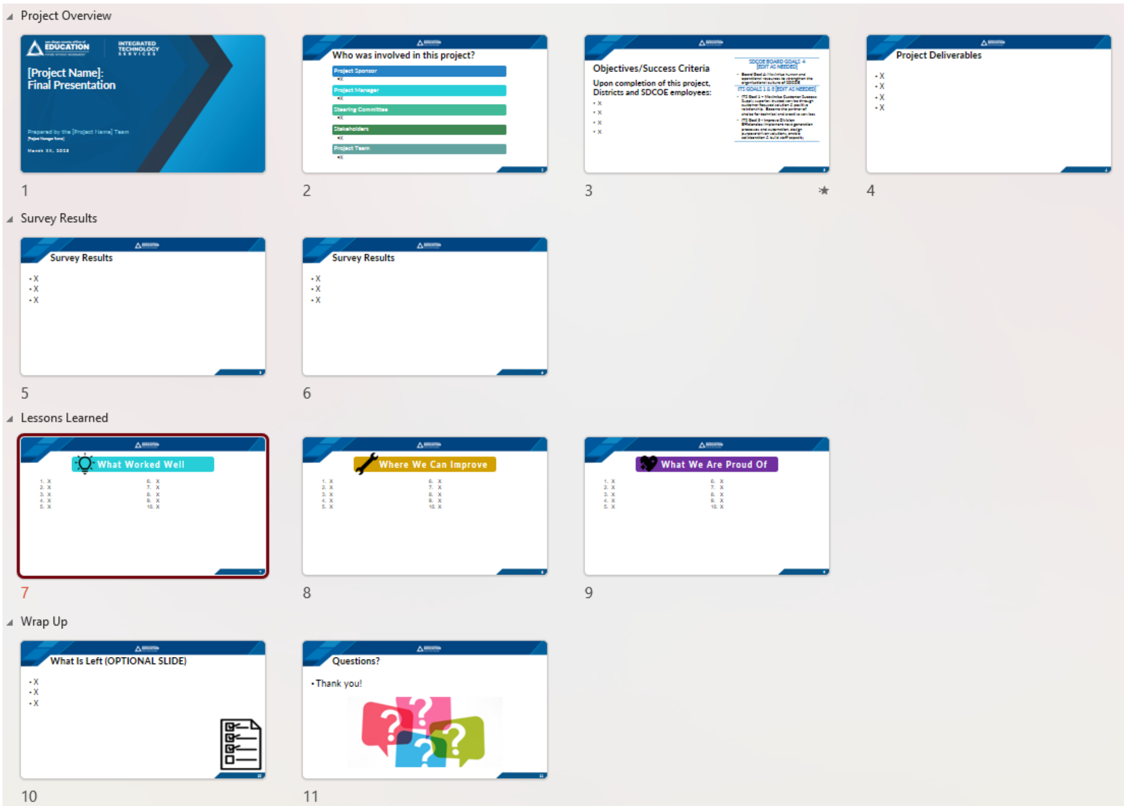
Tips:

- Designing your final report in PowerPoint allows you to easily present it at a meeting, then PDF as your report.
- When creating it, copy/paste content and slides from your Project Charter and/or Kickoff deck.
- For survey results and lessons learned, group feedback into themes.
- Present your Final Report before your team's celebration. This gives your Sponsor a clear picture of the project before recognizing the team's success.

Sample Final Report / Presentation Format

CREATE THESE SLIDES

Filename: Final Report for [Project Name] XX-XX-XX.pptx



Project Overview Section

- The "Why" behind the project (from your Project Charter)
- Project goals and objectives (from your Project Charter)
- Connection to organization goals (from your Project Charter)
- Project team members (from your Project Charter)
- Deliverables and outcomes

Survey Results Section

- Summary of survey results with an interpretation of the data and what the results mean
- Main themes from open-ended responses
- A few direct quotes, both positive and constructive

Lessons Learned Section

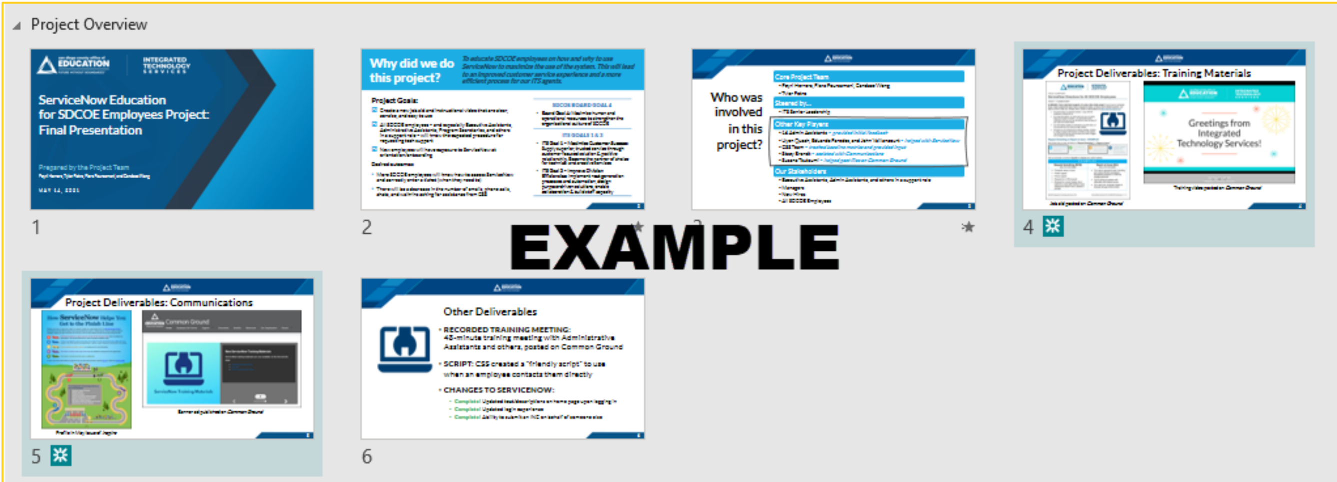
- What worked well
- What could be improved next time
- What the team is most proud of

Next Steps / What's Left

- Remaining tasks or deliverables
- Celebration date or acknowledgments
- Invite questions and discussion

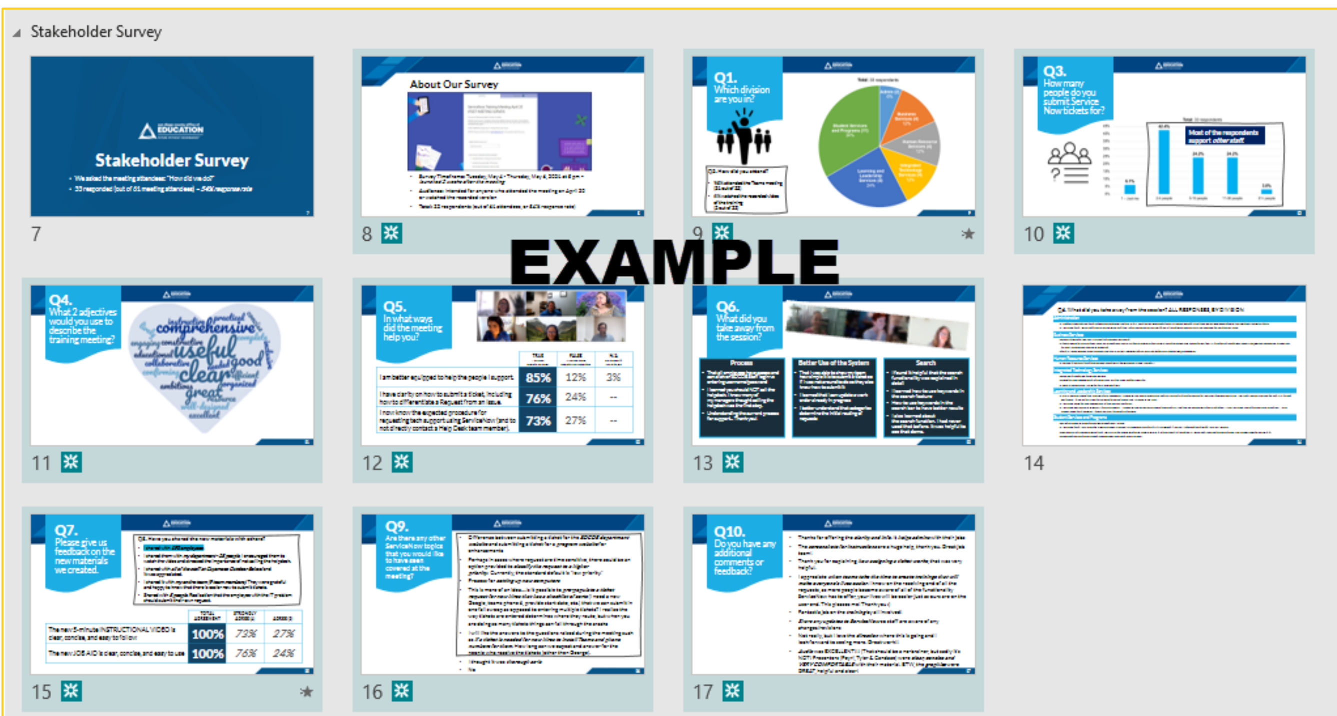
Project Overview

Tells the viewer/reader why we did the project, who was involved, and what the project team delivered.



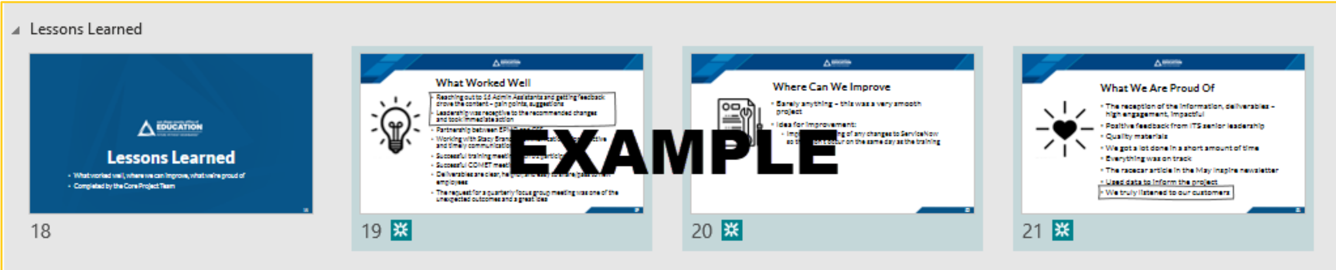
Stakeholder Survey

Explain the survey results, with an interpretation of the data. Information is grouped into themes.



Lessons Learned

Share what worked well, where we can improve, and what we are proud of for this project.



What’s Left

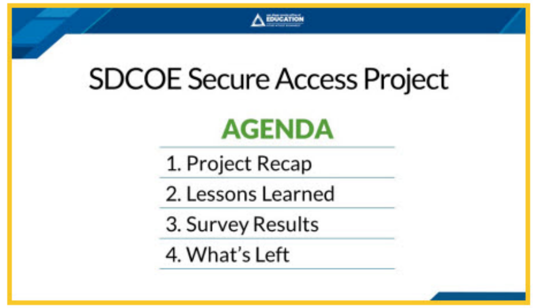
Share any pending items, the date of the celebration, and so on.

See another example on the following pages.

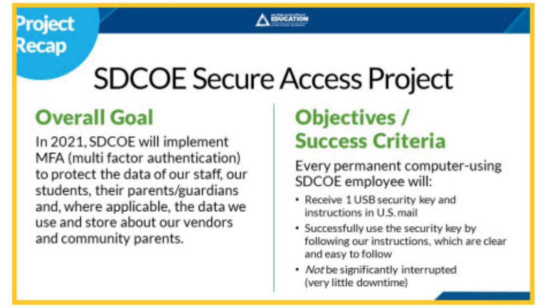
Sample Final Report

This report was presented to the Sponsor and Steering Committee after the Lessons Learned and Stakeholder Surveys were completed.

1 Title Slide

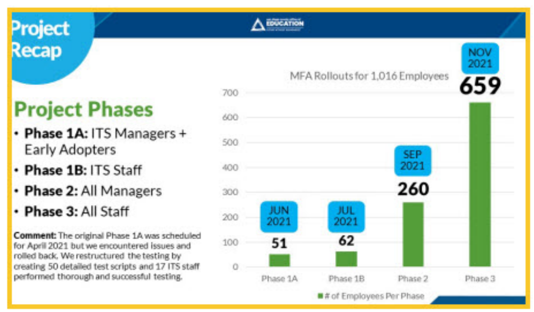


2 Agenda / Contents



3 Project Goal & Objectives

4 The Project Team



5 Phases

6 Deliverables

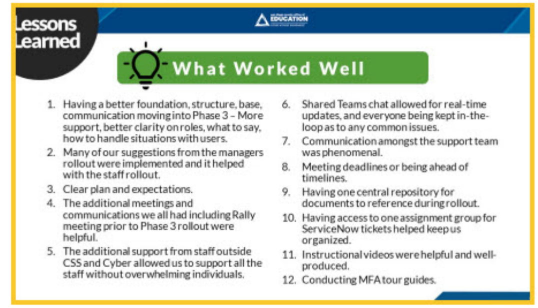
Prepared by the SDCOE Enterprise Project Management Office

Sample Final Report

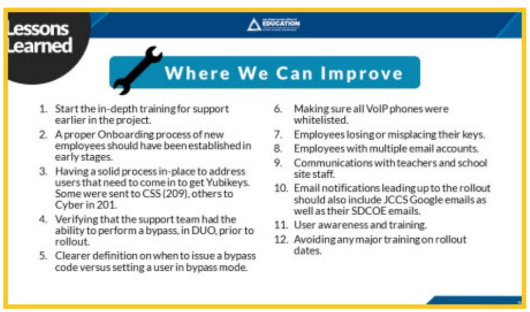
This report was presented to the Sponsor and Steering Committee after the Lessons Learned and Stakeholder Surveys were completed.

7 Board and Division Goals

8 Lessons Learned Process



9 What Worked Well



10 Where We Can Improve

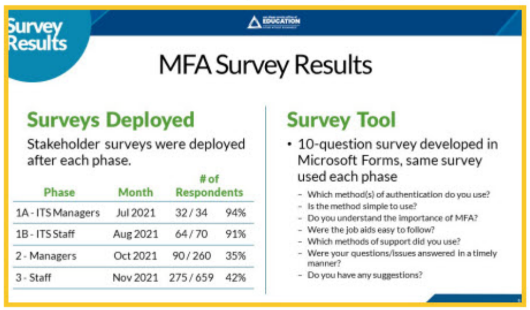
11 What We Are Proud Of

12 Word Cloud
https://classic.wordclouds.com

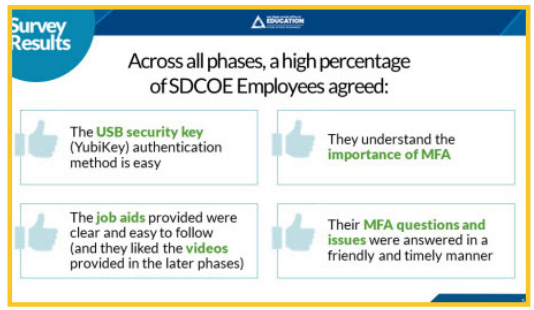
Prepared by the SDCOE Enterprise Project Management Office

Sample Final Report

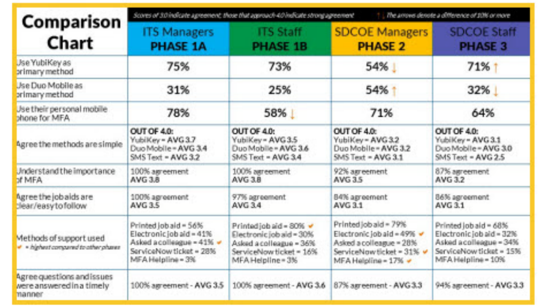
This report was presented to the Sponsor and Steering Committee after the Lessons Learned and Stakeholder Surveys were completed.



13 Stakeholder Survey Process

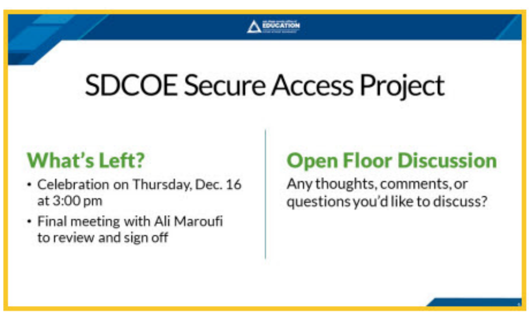


14 Survey Results Summary



Comparison Chart	ITS Managers PHASE 1A	ITS Staff PHASE 1B	SDCOE Managers PHASE 2	SDCOE Staff PHASE 3
Use YubiKey as primary method	75%	73%	54% ↓	71% ↑
Use Duo Mobile as primary method	31%	25%	54% ↑	32% ↓
Use their personal mobile phone for MFA	78%	58% ↓	71%	64%
Agree the methods are simple	OUT OF 4.0: YubiKey = AVG 3.7 Duo Mobile = AVG 3.4 SMS Text = AVG 3.2	OUT OF 4.0: YubiKey = AVG 3.5 Duo Mobile = AVG 3.6 SMS Text = AVG 3.4	OUT OF 4.0: YubiKey = AVG 3.2 Duo Mobile = AVG 3.2 SMS Text = AVG 3.1	OUT OF 4.0: YubiKey = AVG 3.1 Duo Mobile = AVG 3.0 SMS Text = AVG 2.5
Understand the importance of MFA	100% agreement AVG 3.8	100% agreement AVG 3.8	92% agreement AVG 3.5	87% agreement AVG 3.2
Agree the job aids are clear/easy to follow	100% agreement AVG 3.5	97% agreement AVG 3.4	84% agreement AVG 3.1	86% agreement AVG 3.1
Methods of support used ✔ = highest compared to other phases	Printed job aid = 56% Electronic job aid = 41% Asked a colleague = 41% ✔ ServiceNow ticket = 28% MFA Helpline = 3%	Printed job aid = 80% ✔ Electronic job aid = 30% Asked a colleague = 36% ServiceNow ticket = 16% MFA Helpline = 3%	Printed job aid = 79% Electronic job aid = 49% ✔ Asked a colleague = 28% ServiceNow ticket = 31% ✔ MFA Helpline = 17% ✔	Printed job aid = 68% Electronic job aid = 32% Asked a colleague = 34% ServiceNow ticket = 15% MFA Helpline = 10%
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

15 Survey Data



16 What's Left

Prepared by the SDCOE Enterprise Project Management Office

4.3
Celebration

- Project Celebration

PROJECT CELEBRATION

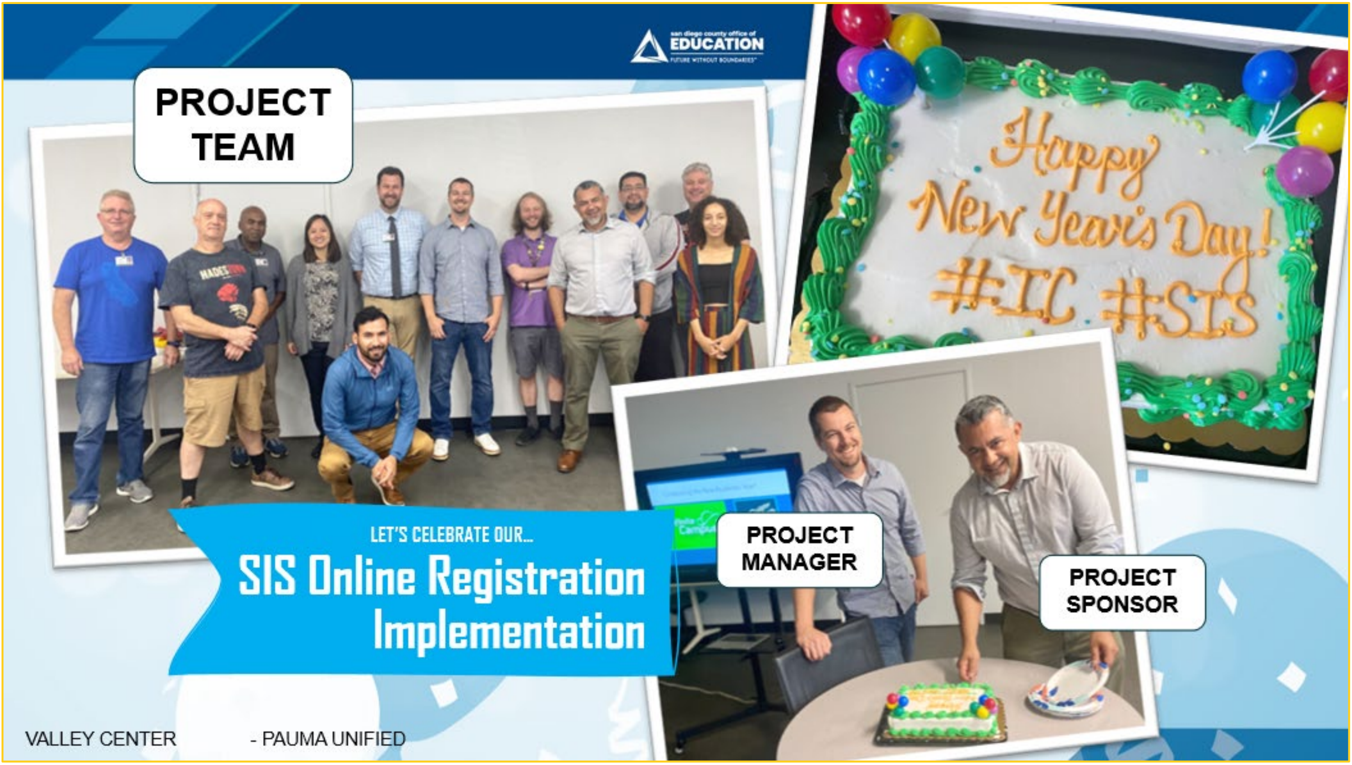
Celebrating the completion of a project is an important part of project management. A well-timed celebration acknowledges the team's hard work, provides closure, boosts morale, and reinforces a culture of appreciation. It also helps energize the team for the next initiative.

Tips for Planning Your Celebration

- Invite the full project team to the celebration. Schedule it after your final report presentation.
- Keep it short, simple, and fun.
- What to include:
    - Ask the Sponsor to say a few words of appreciation.
    - Recap the project story. Revisit the "why" and what was accomplished. Share what people had to say (survey results).
    - Highlight standout efforts and challenges overcome.
    - Optional "add-ons": A project trivia game, food/snacks, certificates.
- Consider how to make it special for your team. What does your project team like?

Examples of Celebrating In Person

Celebrate with cake



Celebrate with a Celebration Cart (push coffee and treats past everyone's desks)

Examples of Celebrating Virtually

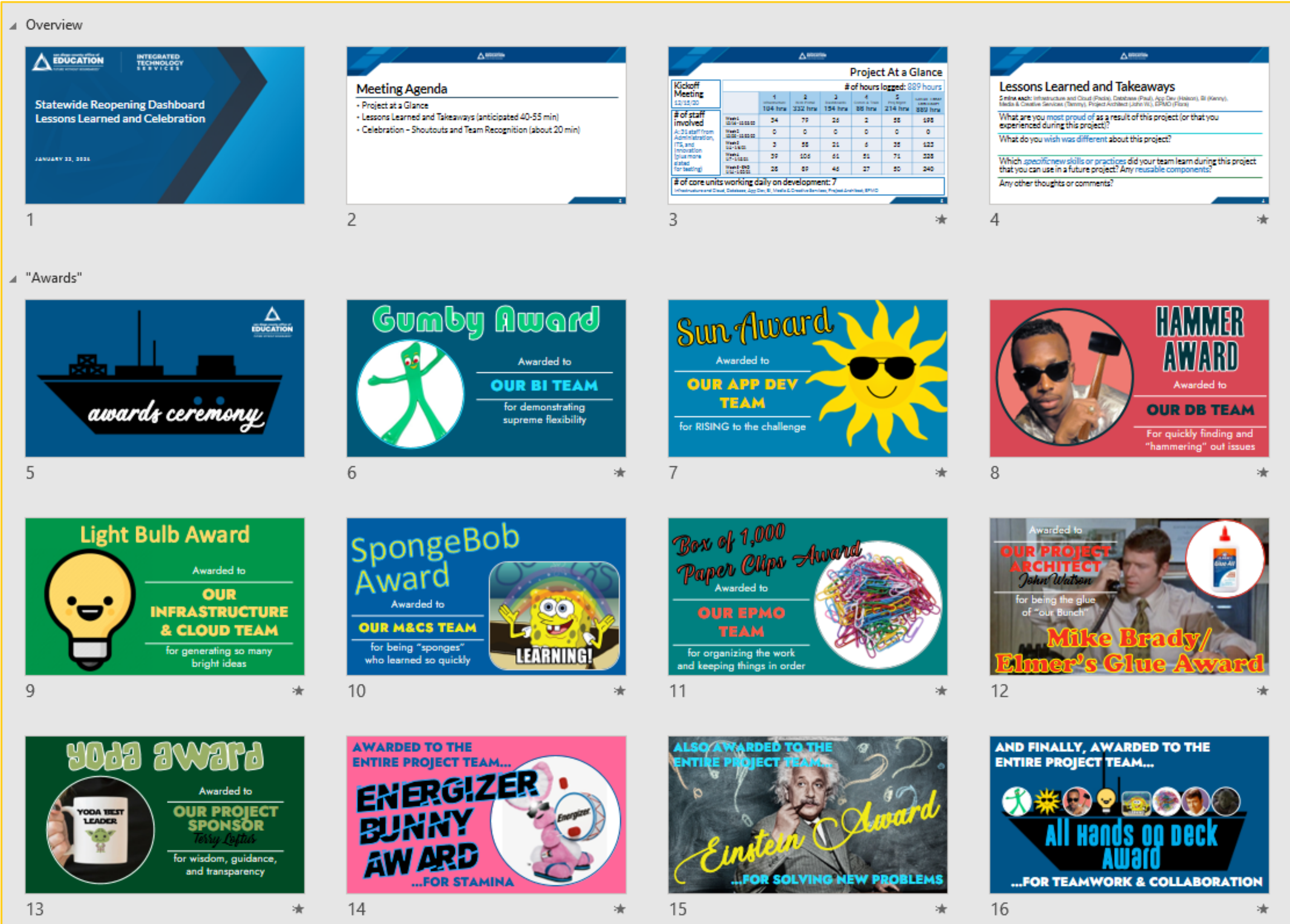
Acknowledge *every* team member

ServiceNow Request Management Project

An “ABC Recognition” allowed each team member to be acknowledged, as well as the team members’ collective attributes (achiever, adaptable, bright, brainy, etc.).

Give fun "awards" to each team (Gumby Award, Hammer Award, SpongeBob Award, Einstein Award)

Statewide Reporting Dashboard Project



This was a project with multiple teams from different departments. Random "awards" were created. Time was provided for shoutouts and team recognition.

Incorporate a game

Unified Communications Project

This was an Aloha-themed celebration and team members were invited to wear something Hawaiian. Attendees got to hear feedback from the stakeholders (via the survey) as well as words from the Project Sponsor. Teams were acknowledged collectively. There was a music guessing game where 8 phone-related songs were played (I Just Called To Say I Love You by Stevie Wonder, Call Me by Blondie, etc.), since this project included rolling out new phones compatible with Microsoft Teams.