Project Management Toolkit

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

https://epmo.sdcoe.net
Project Management Phases

- **Job Aid:** A list of the key activities that occur during the Planning, Execution, and Closure phases of a project
The Project Charter may begin during Initiation

Initiation

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

Planning

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

Execution

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

Closure

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

Revised September 2023
**Project Charter**

- **Template:** Blank Project Charter Template *(AVAILABLE IN WORD)*
- **Sample:** ServiceNow Education for SDCOE Employees Project
- **Sample:** SDCOE Secure Access MFA Project
I. Project Name

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

II. Project Organization

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td></td>
</tr>
<tr>
<td>Sponsor</td>
<td></td>
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<tr>
<td>Steering Committee</td>
<td>Weekly</td>
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<tr>
<td>Stakeholders</td>
<td>Bi-Weekly</td>
</tr>
<tr>
<td>Project Team</td>
<td>Monthly</td>
</tr>
<tr>
<td>Others Involved</td>
<td>As Needed</td>
</tr>
</tbody>
</table>

III. Project Details

Project Description

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

X

Scope

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

In scope:

Out of scope:

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

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

- X

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

- X

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

<table>
<thead>
<tr>
<th>Phase/Major Milestone</th>
<th>Responsible (Lead)</th>
<th>Start Date or Month Begin</th>
<th>End Date or Month End</th>
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</thead>
<tbody>
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<td>10.</td>
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</tbody>
</table>
V. Tools

<table>
<thead>
<tr>
<th>Tool</th>
<th>If Yes, which board?</th>
<th>Do any new members need to be added?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday.com</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Microsoft Teams</td>
<td></td>
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<tr>
<td>OneDrive</td>
<td></td>
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<tr>
<td>SharePoint Site</td>
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<tr>
<td>Other</td>
<td></td>
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</tr>
</tbody>
</table>

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.
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

**Steering Committee**
Key people that assist the project manager in making decisions and moving the project forward
- ITS Senior Leadership

**Project Team**
Supports the project manager in performing work of the project to achieve its objectives
- Peyri Herrera, Flora Pourzamani, Tyler Petro, Candace Wong

**Sponsor**
The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project
- Terry Loftus

**Stakeholders**
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)

**Others Involved**
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 (reference 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

<table>
<thead>
<tr>
<th>Phase/Major Milestone</th>
<th>Responsible (Lead)</th>
<th>Start Date or Month Begin</th>
<th>End Date or Month End</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Planning (3 weeks)</strong></td>
<td>Peyri, Flora</td>
<td>3/1/21</td>
<td>3/19/21</td>
</tr>
<tr>
<td>• Obtain from Tyler the Top 5 Requests and Top 5 Incidents <em>(PEYRI, FLORA)</em></td>
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<tr>
<td>• Test entry of the top requests and incidents <em>(PEYRI)</em></td>
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<tr>
<td>• Obtain from John V. the dropdown list of incidents that SDCOE staff can choose from <em>(PEYRI)</em></td>
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<tr>
<td>• Determine if the “I am having trouble with” search box can be a Contains search instead of Begins With (for better usability) <em>(UYEN)</em></td>
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<tr>
<td>• Work with John V. to determine who will conduct the training meeting with Admin Assistants <em>(PEYRI)</em></td>
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<tr>
<td><strong>Prep Phase (3.5 weeks)</strong></td>
<td>Peyri, Candace, Flora</td>
<td>3/22/21</td>
<td>4/13/21</td>
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<tr>
<td><strong>Design/Develop Materials</strong></td>
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<tr>
<td>• Create job aid <em>(PEYRI, CANDACE)</em></td>
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<tr>
<td>• Create video <em>(PEYRI)</em></td>
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<tr>
<td>• Review and sign off on materials</td>
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<tr>
<td>• Post materials on Common Ground</td>
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<tr>
<td><strong>Plan Meetings</strong></td>
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<tr>
<td>• Schedule and conduct Teams meeting with CSS to inform them of the effort <em>(TYLER)</em></td>
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<tr>
<td>• Set up spreadsheet to capture baseline metrics <em>(PEYRI/CANDACE)</em></td>
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<tr>
<td>• Have CSS populate spreadsheet <em>(TYLER)</em></td>
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<tr>
<td>• Draft email to Admin Assistants and Program Secretaries <em>(CANDACE, PEYRI)</em></td>
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<tr>
<td>• Determine date/time and schedule Teams dry run AND training meeting with Admin Assistants and Program Secretaries <em>(CANDACE)</em></td>
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</tr>
<tr>
<td>• 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 <em>(FLORA)</em></td>
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<tr>
<td>• 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 <em>(FLORA)</em></td>
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<tr>
<td><strong>Plan Communications</strong></td>
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</tr>
<tr>
<td>• Work with Stacy on methods of communications <em>(FLORA/PEYRI)</em></td>
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</tbody>
</table>

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

<p>| | |</p>
<table>
<thead>
<tr>
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</thead>
</table>
| ☒ 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.
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I. Project Name

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>SDCOE Secure Access Project (MFA)</td>
<td>01/04/21</td>
<td>10/22/21</td>
</tr>
</tbody>
</table>

MFA = Multi-Factor Authentication

II. Project Organization

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

<table>
<thead>
<tr>
<th>Project Manager</th>
<th>Sponsor</th>
<th>Stakeholders</th>
<th>Others Involved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</td>
<td>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</td>
<td>An individual, group, or organization that may affect or be affected by outcome of the project</td>
<td>List anyone else who will be involved and state their roles</td>
</tr>
<tr>
<td>• Project Manager: Flora Pourzamani</td>
<td>• Executive Sponsor: Terry Loftus</td>
<td>• Every permanent SDCOE employee is impacted because they will be issued a device</td>
<td>• Instructional Guidance: Peyri Herrera</td>
</tr>
<tr>
<td>• Project Management Assistant: Candace Wong</td>
<td>• Project Sponsor: Ali Maroufi</td>
<td>• Cybersecurity Team</td>
<td>• Graphics Dept: Package and mail 1 USB security key + 1 job aid to each employee (in phases)</td>
</tr>
<tr>
<td>Steering Committee</td>
<td></td>
<td></td>
<td>• Communications: Stacy Brandt</td>
</tr>
<tr>
<td>Key people that assist the project manager in making decisions and moving the project forward</td>
<td></td>
<td></td>
<td>• Media &amp; Creative Services: Video</td>
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<tr>
<td>• ITS Sr. Leadership: Terry Loftus, John Cusack, Peyri Herrera, John Vaillancourt, Beckie Benson, Tammy Carpowich</td>
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<td></td>
<td>• Support: Computer Support Services (CSS), Ops, and Cyber</td>
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<tr>
<td>Project Team</td>
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<td>• Network: For new MFA email account</td>
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<tr>
<td>Supports the project manager in performing work of the project to achieve its objectives</td>
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<td>• Legal</td>
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<tr>
<td>• Core Team: SDCOE Cybersecurity – Ali Maroufi, Ruben Sandoval, Vong Sopha</td>
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<td>• Duo (External)</td>
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<td>• Graphics Lead: Candida Bothel-Hammond</td>
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<tr>
<td>• Support Leads: Tyler Petro, Paola Ramos</td>
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</tbody>
</table>

III. Project Details

Project Description

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

One of SDCOE’s top priorities is to protect the data of our staff, students, parents/guardians, vendors, and community partners. To aid in protecting our accounts, all SDCOE employees will insert a **USB security key** into their computers or optionally use their **personal mobile phones** for multi-factor authentication (MFA) when accessing Office 365 and other secured apps. MFA is an authentication method in which a computer user is granted access only after successfully presenting two or more pieces of evidence, or factors, in order to log in. **The goal of this project is to issue by U.S. mail one MFA security key to each permanent SDCOE employee.** The MFA security key is a small hardware device, like a USB drive. A significant component of this project is communication and organizational change management (OCM).

The USB security key is about the size of a small flash drive:
**Scope**
Who/how many this will impact? What is included (or not included) that can help manage the expectations?

**In scope:**
- All permanent computer-using SDCOE employees will be impacted (Total # = 1085)
- Secured apps: Office365, ServiceNow, Monday.com
- Employees will be issued 1 USB security key
- Employees will be given the option to authenticate using the Duo Mobile push notifications on their personal mobile phones

**Out of scope:**
- We will not secure Google Suite, Synergy SIS or PeopleSoft in this project
- We will secure apps only – MFA will not be used when logging in to a computer

**Deliverables**
Which products or results do you expect upon completion of the project?
- 1085 configured USB security keys (1 per employee), mailed via U.S. mail
- 1 multi-purpose PowerPoint presentation
- 1 ‘Why MFA’ video
- 2 instructional videos (YubiKey, Duo Mobile)
- 3 job aids (Getting Started, YubiKey Daily Use, Duo Mobile) – the first two job aids will be mailed home with the USB security key so employees can easily follow the instructions upon receipt
- 1 opt-in form for use of personal mobile phones
- 1 dedicated phone # for MFA emergencies (aka MFA Helpline)
- Planning documents:
  - Calendar (PowerPoint)
  - Communications Plan
  - Address and Computer Type Validation Process
  - Support Procedures Plan
- Add MFA Catalog Item to ServiceNow incident

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

<table>
<thead>
<tr>
<th>Board Goals</th>
<th>ITS Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ #B1 Connect the educational experience to the world of work</td>
<td>☒ #ITS1 Maximize Customer Success</td>
</tr>
<tr>
<td>☐ #B2 Provide educational opportunities and supports to SDCOE schools and school districts</td>
<td>☒ #ITS2 Deliver Value: Applications &amp; Systems</td>
</tr>
<tr>
<td>☒ #B3 Become the leader and model for innovation</td>
<td>☒ #ITS3 Improve Division Efficiencies</td>
</tr>
<tr>
<td>☒ #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE</td>
<td>☒ #ITS4 Be the Cybersecurity Solutions Leader</td>
</tr>
</tbody>
</table>

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

**Overall goal:** SDCOE employees will be secure with their password and thus our accounts and data are protected

Project success means that:
1. Every SDCOE employee (with a device) will successfully receive the USB security key and instructions via U.S. mail
2. Every SDCOE employee (with a device) will successfully use the USB security key using our instructions, which are clear and easy to follow
3. The employees’ work will not be significantly interrupted (very little downtime)

**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.

- Loss of productivity if employees need to wait too long for someone to troubleshoot – *must have support procedures in order and entire support team prepared for each Go Live*
- If they lose the USB security key or do not have a backup, they won’t be able to access applications – *must have a plan for bypass, must be prepared to respond to MFA helpline (emergencies)*
- Lack of Manager support will impact adoption – *bring Managers on before Employees and ask for their help with communicating*
- Employees must follow instructions on their own to get started – *create simple, easy-to-read documents; create instructional videos*
- Bad mailing addresses in PeopleSoft – *we must ask employees to validate their addresses*
- USB security keys could get lost in the mail or not delivered
IV. Project Schedule & Milestones

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

<table>
<thead>
<tr>
<th>Phase/Major Milestone</th>
<th>Responsible (Lead)</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discovery/Planning/Prep Phase (6 weeks)</td>
<td>Ali/Flora</td>
<td>01/04/21</td>
<td>04/08/21</td>
</tr>
</tbody>
</table>

- Research different security keys, vendors, and costs
- Choose a solution (security key/vendor)
- Purchase the Duo licenses
- Purchase the security keys
- Configure Duo
- Use a Teams group chat to communicate about the project
- Test the security keys (PC, Mac, Chromebook)
- Write instructions and troubleshooting steps
- Coordinate with Graphics to mail out the security keys and job aids
- Train CSS
- Send communication to all ITS employees explaining the process,
- Create spreadsheet that can be used to validate addresses, document receipt of security key and successful installation of the security keys
<table>
<thead>
<tr>
<th>Phase/Major Milestone</th>
<th>Responsible (Lead)</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Phase 1 Rollout: All ITS Division - 106 employees (5 weeks)</strong></td>
<td>Ali, Flora</td>
<td>04/09/21</td>
<td>05/14/21</td>
</tr>
<tr>
<td><em>Send out all staff communication to let them know about the project and process and what to expect</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graphics mail out the security keys and job aids to employees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-mail phone installation instructions to managers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work with Admins on collecting information and documenting employees receiving the security keys and successfully installing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect and review feedback</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work with CSS to make sure they are trained and ready</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refine the instructions and troubleshooting if needed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Post job aid on Common Ground or in ServiceNow as a knowledgebase article</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Survey all ITS staff at the end to collect feedback on the process (align the survey with the objectives)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Readiness Check (1 week)</strong></td>
<td>Ali, Flora</td>
<td>05/17/21</td>
<td>05/21/21</td>
</tr>
<tr>
<td><em>Terry addresses at SLT</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All addresses are validated</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communication has been sent to all managers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Duo licenses have been purchased</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YubiKeys have been purchased</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The list of addresses and instructions have been sent to Graphics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changes made as result of the feedbacks</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Phase 2 Rollout: All SDCOE Managers – 257 managers (10 weeks)</strong></td>
<td>Ali, Flora</td>
<td>05/24/21</td>
<td>07/16/21</td>
</tr>
<tr>
<td>Meet with ITS Leadership and Admin Assistants to set expectations – Admin Assistants will be asked to work with their departments to ensure that the security keys were (1) received in the mail, (2) registered/installed, and (3) able to log in successfully to Office365 and other Cloud-based services; they can use the group chat to ask questions; there will be a team to use to manage the files</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Send out all staff communication to let them know about the project and process and what to expect</em></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work with Admin Assistants to validate addresses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Graphics mail YubiKey security keys and instructions to all SDCOE Managers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email instruction to install MFA on phones to all managers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin Assistants check in on staff and update shared spreadsheet based on timeline provided</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Conduct COMET Meeting to explain the project to managers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase/Major Milestone</td>
<td>Responsible (Lead)</td>
<td>Start Date</td>
<td>End Date</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------------</td>
<td>--------------------</td>
<td>------------</td>
<td>----------</td>
</tr>
<tr>
<td>Phase 3 Rollout: All SDCOE Classified/Certificated employees – 716 employees (3 weeks)</td>
<td>Ali, Flora</td>
<td>07/19/21</td>
<td>10/01/21</td>
</tr>
</tbody>
</table>
| - Meet with ITS Leadership and Admin Assistants to set expectations – Admin Assistants will be asked to work with their departments to ensure that the security keys were (1) received in the mail, (2) registered/installed, and (3) able to log in successfully to Office365 and other Cloud-based services; they can use the group chat to ask questions; there will be a team to use to manage the files  
  - *Send out all staff communication to let them know about the project and process and what to expect  
  - Work with Admin Assistants to validate addresses  
  - Graphics mail YubiKey security keys and instructions to all SDCOE Managers  
  - Email instruction to install MFA on phones to all employees  
  - Admin Assistants check in on staff and update shared spreadsheet based on timeline provided |                     |            |          |
| Project Closeout (3 weeks)                                                           | Flora              | 10/04/21   | 10/22/21 |
| - Lessons Learned  
  - Survey  
  - Final Report  
  - Celebration  
  - Sponsor Sign off |                     |            |          |

V. Tools

- **Monday.com**
  - If Yes, which board? New MFA Project Board
  - Do any new members need to be added? Yes, all

- **Microsoft Teams**
  - If Yes, which team/channel will you use? New Team MFA

- **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.
  - Duo Licenses
  - 1600 MFA security keys
  - Printing and mailing

- **Communication Plan**: Identify all critical communication channels for project stakeholders, frequency of communication, types of information to be communicated, and method of regular communication.
  - A Weekly Status Report sent via email on Fridays will be used to communicate accomplishments, in progress, what’s next, and risks
  - A full communications plan will be developed

- **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.
  - Monday.com will be used to manage all activities/tasks
  - Regularly scheduled meetings will be used to provide updates, statuses, etc.
  - A group chat for the project team only will be used for quick updates and questions
  - A group chat for the project team + Admin Assistants (per wave) will be used for quick updates and questions

- **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.
Project Roles & Responsibilities

- **Job Aid**: A list of project roles and responsibilities
- **Job Aid**: How to Serve as a Project Team Member
Waterfall project management maps out a project into distinct, sequential phases, with each new phase beginning only when the previous one has been completed. This table lists typical project roles and responsibilities. Not all projects require all roles, some roles may have more than one individual, and some individuals may play more than one role.

<table>
<thead>
<tr>
<th>Project Role</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Executive Sponsor       | • The top decision maker authorized to engage the project and fund it  
                           • Has ultimate authority and responsibility for the project  
                           • Approves changes to scope at a high level  
                           • Provides additional funds for scope changes                                           |
| Project Sponsor         | • The top decision maker authorized to engage the project and fund it  
                           • Has ultimate authority and responsibility for the project  
                           • Makes the business decisions for the project  
                           • Makes user resources available  
                           • Approves deliverables in conjunction with Steering Committee                        |
| Steering Committee      | • Assists the Project Manager and team in making decisions and moving the project forward  
                           • Provides leadership in support of the project on behalf of stakeholders  
                           • Resolves issues escalated by the Project Manager or Project Team Leads                 |
| Project Manager         | • Oversees the project work plan through management, review, and prioritization  
                           • Reports on status  
                           • Leads project team that is responsible for achieving the project objectives  
                           • Responsible for ensuring project goals, objectives and deliverables are accomplished on time, on budget  
                           • Creates project plan and deliverables with project leads  
                           • Schedules and facilitates project team meetings  
                           • Provides status and progress reviews to Executive Sponsor and Steering Committee  
                           • May manage and lead various team resources  
                           • Brings issues and recommends resource and policy changes to the Steering Committee as needed  
                           • Identifies required project team members  
                           • Motivates and coaches team members  
                           • Coordinates with leads to develop Communications, Risk Management, Training and Testing plans |

*Remember that a Project Manager (generally) should not be assigned tasks that are performed by the Project Team Members.*
<table>
<thead>
<tr>
<th>Project Role</th>
<th>Responsibilities</th>
</tr>
</thead>
</table>
| Project Team Lead                  | • Responsible for contributing to overall project objectives and specific team deliverables  
  • Manages specific project plan activities and contributes to project plan development in collaboration with Project Manager  
  • Coordinates documentation, testing, and training, and any additional efforts related to the project plan  
  • May be assigned full or part time to project activities                                                                 |
| Project Team Member                | • Supports the Project Manager in performing work of the project to achieve its objectives  
  • Escalates issues to team lead for resolution  
  • May be assigned full or part time to project activities                                                                 |
| Project Management Assistant       | • Assists the Project Manager in achieving the project objectives                                                                                   |
| Business Lead                      | • Represents the stakeholders and makes decisions on their behalf  
  • Participates as project team member to ensure project achieves its objectives                                                                    |
| Interested Parties (Stakeholders) / End Users | • An individual, group, or organization that may affect or be affected by outcome of the project  
  • Participate in User Acceptance Testing (UAT) and other activities associated with the project  
  • Provides source information to the team  
  • Provides business understanding of the organization  
  • Represents the user area in identifying procedures  
  • Reviews and confirms major products for the project                                                                 |

Other Roles:  
• Tech Support  
• Database  
• Application Developer  
• Business Analyst  
• Training Support  
• Change Control Board
**Scrum**

Scrum is one of the Agile methodologies designed to guide teams in the iterative and incremental delivery of a product. Its focus is on the use of an empirical process that allows teams to respond rapidly, efficiently, and effectively to change. The roles are different compared to Traditional / Waterfall.

<table>
<thead>
<tr>
<th>Project Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Owner</td>
<td>• Provides the vision of what to build and conveys that to the team</td>
</tr>
<tr>
<td></td>
<td>• Focuses on business and market requirements</td>
</tr>
<tr>
<td></td>
<td>• Prioritizes all the work that needs to be done</td>
</tr>
<tr>
<td></td>
<td>• Builds and manages the backlog</td>
</tr>
<tr>
<td></td>
<td>• Interacts with the team and other stakeholders to make sure everyone understands the items in the backlog</td>
</tr>
<tr>
<td></td>
<td>• Motivates the team with a goal and vision</td>
</tr>
<tr>
<td>Scrum Master</td>
<td>• Organizes meetings</td>
</tr>
<tr>
<td></td>
<td>• Deals with roadblocks and challenges</td>
</tr>
<tr>
<td></td>
<td>• Works with the Product Owner to ensure the backlog is ready for the next sprint</td>
</tr>
<tr>
<td></td>
<td>• Makes sure the team follows the Scrum process</td>
</tr>
<tr>
<td>Development Team</td>
<td>• Works together, helps each other, and shares a deep sense of camaraderie</td>
</tr>
<tr>
<td></td>
<td>• Owns the plan for each sprint; they anticipate how much work they can complete in each iteration</td>
</tr>
</tbody>
</table>

**Kanban**

Kanban project management is an Agile framework used to visualize and improve workflows, reduce waste and inefficiency, and increase team focus by limiting work in progress. First developed by Toyota engineer Taiichi Ohno in the 1940s, Kanban comes from the Japanese word for “sign” or “visual board.” There are no roles in the Kanban board methodology of Agile Project Management.

<table>
<thead>
<tr>
<th>Project Role</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>None</td>
</tr>
</tbody>
</table>

Image credit:
- Waterfall method by LUTFI GANI AL ACHMAD
- Scrum by Puspito
- Kanban by Flowicon
PROJECT MANAGEMENT

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.

- Project Sponsor
- Steering Committee
- Project Manager
- Project Lead
- Project Team Member – for a large project there may be a Core Team and Extended Teams
- 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?

**Complete Tasks (Project Plan)**

The Project Manager or Project Lead 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

- 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

**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
**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 necessary)**

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](https://epmo.sdcoe.net)
Project Plan

• **Job Aid:** Tips for Creating a Project Plan

• **Job Aid:** Steps to Establish a Project Schedule

• **Template:** Project Plan Excel Template *(AVAILABLE IN EXCEL)*

NOTE: The Excel template can be used in lieu of project management software.
In your Project Charter, you already identified your project’s phases/milestones. Now you will want to list as many anticipated activities and tasks as possible to develop a project plan. This will be essential for assigning and monitoring tasks, managing due dates, and making the progress transparent to everyone on the project team. Consult with the team members and try to develop a starting point that lists everything you can think of.

You can also create a basic project plan in Excel as shown below. If you have project management software (Microsoft Project, Microsoft Planner, Asana, Monday.com, etc.), enter the work items in the app.

**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 Excel

**Tips for creating a project plan in Excel:**

- 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.

### Examples of Phases in IT Projects:

1. Discovery or Planning (Requirements, Analysis, Communication, etc.)
2. Design
3. Development or Build
4. Testing (include UAT and Sign Off, as needed)
5. Training
6. Pre-Go Live Activities (include Communication)
7. Go Live / Implementation
8. Post-Go Live (include Support, as needed)
9. Closure (Lessons Learned, Surveys, Final Report, Celebration, etc.)

*This list is not meant to be all inclusive and not every phase may be needed.*

### Examples of Statuses:

- Working on it
- Stuck
- Done

[Blank] = Not started
If you have project management software (Microsoft Project, Microsoft Planner, Asana, Monday.com, etc.), enter the work items in the app.

### Sample Project Plan Using Project Management Software

<table>
<thead>
<tr>
<th>ServiceNow Education for SDCOE Employees Project</th>
<th>Subitems</th>
<th>Subitems Status</th>
<th>Responsible</th>
<th>Status</th>
<th>Activity Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subitems</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain from Tyler the Top 5 Requests and Top 5 incidents</td>
<td></td>
<td>Done</td>
<td></td>
<td></td>
<td>Mar 16, 2021</td>
</tr>
<tr>
<td>Test entry of the top requests and incidents</td>
<td></td>
<td>Done</td>
<td></td>
<td></td>
<td>Mar 16, 2021</td>
</tr>
<tr>
<td>Meet with Uyen and John V. to talk about ServiceNow</td>
<td></td>
<td>Done</td>
<td></td>
<td></td>
<td>Mar 16, 2021</td>
</tr>
<tr>
<td>Work with John V. to determine who will conduct the training meeting with Admin Assistants</td>
<td></td>
<td>Done</td>
<td></td>
<td></td>
<td>Mar 16, 2021</td>
</tr>
<tr>
<td>Meet with Terry to review Project Charter</td>
<td></td>
<td>Done</td>
<td></td>
<td></td>
<td>Mar 16, 2021</td>
</tr>
<tr>
<td>Meet with Tyler, Flora, Candace, John V. to introduce the project</td>
<td></td>
<td>Done</td>
<td></td>
<td></td>
<td>Mar 16, 2021</td>
</tr>
</tbody>
</table>

| Prep - Materials Creation                     |          |                |             |        |                   |
| Prep - Scheduling and Communications          |          |                |             |        |                   |
| Execution - Education and Communications      |          |                |             |        |                   |
| Closure                                       |          |                |             |        |                   |

### Tips for creating a project plan in Monday.com:

- **Items (Parent level):**
  a. **Name:** Enter the major milestones, phases, or however you have organized the work. Examples: Planning, Prep, Execution, Closure
  b. **Responsible:** Enter the person(s) responsible for the parent level item
  c. **Status:** This is to mark the status of the entire phase and its subitems
  d. **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:
  a. Task/activity name
  b. Status
  c. Due Date
  d. Owner

- **Comments:** For items and subitems, click the talk bubble to enter any comments/notes for the items or subitems.
  a. 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.
  b. @mention: Type the @ sign and the person’s name to notify that person
  c. Like: Click “Like” to show you’ve seen the comment
  d. Reply: Type a reply on a comment as needed
PROJECT MANAGEMENT TOOLKIT
Steps to Establish a Project Schedule

1. Define your project.
Understand the scope, deliverables, stakeholders, and timeline for the project. A Project Charter is a great source for this information.

2. Identify tasks.
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. TIP: You can use diagrams.net (similar to Visio, requires no login).

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 deadlines.
Set realistic deadlines 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.

9. Create a project plan.
Turn the schedule into a project plan (typically managed using project management software or Excel) and make the plan accessible to your team. Consider keeping a baseline to measure performance against.
Communications Plan

- **Template:** Project Communications Plan Template (AVAILABLE IN WORD)

- **Sample:** Communications Plan for the SDCOE Secure Access MFA Project
Overview

The purpose of the Project Communications Plan is to define the communication requirements for this project and how information will be distributed. Use this document to list the project team members, document types of communications required, meeting guidelines, and a communication escalation process.

NOTE: The Project Manager will take a proactive role in ensuring effective communications on this project.

1. Project Team Directory

This table includes each project team member’s name, title, department, email address, and phone number.

NOTE: There are typical roles and responsibilities using the Waterfall methodology of Project Management. Not all projects require all roles, some roles may have more than one individual, and some individuals may play more than one role. Please see the Project Roles and Responsibilities job aid for more information.

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Title</th>
<th>Dept/Unit</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Steering Committee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Team Lead</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Team Members</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Lead</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Stakeholders/End Users</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications Lead</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2. Types of Communications
The following communications matrix identifies the communications requirements for this project.

<table>
<thead>
<tr>
<th>Information</th>
<th>Delivery Method</th>
<th>Frequency</th>
<th>Owner (Sender)</th>
<th>Audience (Recipients)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kickoff Meeting</td>
<td>In Person</td>
<td>Once</td>
<td>Project Manager</td>
<td>Project team, Sponsor, Stakeholders</td>
</tr>
<tr>
<td>Project Team Meetings</td>
<td>Teams or Zoom</td>
<td>Weekly</td>
<td>Project Manager</td>
<td>Project team</td>
</tr>
<tr>
<td>Monthly Status Meetings</td>
<td>Teams or Zoom</td>
<td>Monthly</td>
<td>Project Manager</td>
<td>Project Stakeholders</td>
</tr>
<tr>
<td>Status Reports</td>
<td>Email</td>
<td>Weekly/Monthly</td>
<td>Project Manager</td>
<td>Everyone involved with the project</td>
</tr>
<tr>
<td>Organization-wide Announcements</td>
<td>Email, Intranet, Internal newsletter, webpages, and Yammer</td>
<td>As Needed</td>
<td>Communications Dept</td>
<td>All SDCOE employees</td>
</tr>
</tbody>
</table>

**NOTE:** Make sure your communication channel matches your audience.
3. Meeting Guidelines

- **Agenda:** The agenda should identify the presenter for each topic along with a time limit for that topic. The first item in the agenda should be a review of action items from the previous meeting.

- **Meeting Minutes:** Meeting minutes will include the status of all items from the agenda along with new action items and the Parking Lot list.

- **Action Items:** Action items will include both the action item along with the owner of the action item. Meetings will start with a review of the status of all action items from previous meetings and end with a review of all new action items resulting from the meeting.

- **Note Taker:** The Note Taker is responsible for documenting the status of all meeting items, maintaining a Parking Lot item list and taking notes of anything else of importance during the meeting.

- **Parking Lot:** The Parking Lot is a tool used by the facilitator to record and defer items which aren’t on the meeting agenda; however, merit further discussion at a later time or through another forum.

4. Communication Escalation Process

As issues or complications arise with regards to project communications it may become necessary to escalate the issue if a resolution cannot be achieved within the project team. The table below defines the priority levels, decision authorities, and timeframes for resolution.

<table>
<thead>
<tr>
<th>Priority</th>
<th>Definition</th>
<th>Decision Authority</th>
<th>Timeframe for Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority 1</td>
<td>Major impact to project or business operations. If not resolved quickly there will be a significant adverse impact to revenue and/or schedule.</td>
<td>Steering Committee and Project Sponsor</td>
<td>Within 24 hours</td>
</tr>
<tr>
<td>Priority 2</td>
<td>Medium impact to project or business operations which may result in some adverse impact to schedule.</td>
<td>Project Sponsor</td>
<td>Within 24 hours</td>
</tr>
<tr>
<td>Priority 3</td>
<td>Slight impact which may cause some minor scheduling difficulties with the project but no impact to business operations or revenue.</td>
<td>Project Manager</td>
<td>Within 48 hours</td>
</tr>
<tr>
<td>Priority 4</td>
<td>Insignificant impact to project but there may be a better solution.</td>
<td>Project Manager</td>
<td>Work continues</td>
</tr>
</tbody>
</table>
## 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.

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

### 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.
Kickoff Meeting

- **Job Aid:** A picture and list of the Kickoff Meeting components (AVAILABLE IN POWERPOINT)

- **Template:** Kickoff Meeting Agenda (AVAILABLE IN WORD)
PROJECT MANAGEMENT TOOLKIT

Kickoff Meeting Components

Pull from your Project Charter to create your Kickoff Meeting presentation. The PowerPoint template is a starting point – feel free to tailor your presentation to meet your needs.

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
8. Objectives/Success Criteria
9. Project Schedule
10. Next Steps
# [Insert Project Name] Kickoff Meeting Agenda

[Day of Week], Month XX, 2022  
X:XX – X:XX p.m.  
Insert Location Here (Teams, Zoom, Room #)

<table>
<thead>
<tr>
<th></th>
<th>Introductions</th>
<th>Name</th>
<th>X:XX - X:XX p.m.</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Background</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
<tr>
<td>3</td>
<td>Project Description</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
<tr>
<td>4</td>
<td>Project Organization</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
<tr>
<td>5</td>
<td>Business Need/Financial Justification</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
<tr>
<td>6</td>
<td>Objectives/Success Criteria</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
<tr>
<td>7</td>
<td>Project Schedule</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
<tr>
<td>8</td>
<td>Next Steps</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
<tr>
<td>9</td>
<td>Adjournment</td>
<td>Name</td>
<td>X:XX - X:XX p.m.</td>
</tr>
</tbody>
</table>
Folder Structure

- **Job Aid**: A picture and list of the suggested folder structure for your project's file repository
Folders to Set Up *(Use 01, 02, 03 to sort properly if you exceed 10 folders; omit the ones you don’t need)*

1. **Meetings** (agenda, recorded meetings, meeting notes)
2. **Project Plan** (project charter, calendar, project team register)
3. **Status Reports** (Word and PDF versions of status reports)
4. **Communications** (contacts/distribution list, communications templates, email mail merge files)
5. **Requirements and Specs**
6. **Development**
7. **Testing** (test scripts, UAT testing)
8. **Training** (documentation, videos, training for both external and internal, recorded trainings)
9. **Rollout** (files specific to each phase, including lists of stakeholders for each phase)
   a. **Phase 1, for example**
   b. **Phase 2, for example**
   c. **Phase 3, for example**
10. **Closeout Activities** (lessons learned, surveys, final report, celebration)
11. **Administrative** (use if necessary – for billing, contracts, time tracking, etc.)
12. **Miscellaneous** (doesn’t fit anywhere else)
Execution Phase Activities

- **Job Aid:** A list of the key activities performed by the Project Manager/Lead during the Execution Phase
- **Job Aid:** A checklist to prepare for Go Live
### Key Project Management Activities During Execution

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

<table>
<thead>
<tr>
<th><strong>Testing and Sign Off</strong></th>
<th><strong>Support Team</strong></th>
<th><strong>Training &amp; Communication</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Has user acceptance testing been completed?</td>
<td>Have your support staff been trained and/or provided documentation?</td>
<td>Has training been provided to employees/users, and job aids/videos made available?</td>
</tr>
<tr>
<td>Have all issues related to going live been resolved?</td>
<td>Are they prepared to provide ongoing support?</td>
<td>Has the go live date and other important information been communicated to all project stakeholders?</td>
</tr>
<tr>
<td>Has the appropriate party (Project Sponsor or other) given acceptance to proceed with moving the delivered system, service or product into production?</td>
<td>If necessary, has the “service” been added to your service catalog?</td>
<td></td>
</tr>
<tr>
<td>If applicable, has your Change Control Board been notified?</td>
<td>If necessary, has the vendor been notified that their support processes need to be engaged?</td>
<td></td>
</tr>
<tr>
<td>Do we have a backout plan, if needed?</td>
<td>Do you have a clear plan for “Day 1” support procedures, and has that been communicated to the team?</td>
<td></td>
</tr>
</tbody>
</table>

---

**Go / No Go Meeting**

Are we ready? Is it a go?
Status Report

- **Job Aid:** The format to use for the Status Report
- **Template:** Blank Status Report *(AVAILABLE IN WORD)*
- **Sample:** ServiceNow Education for SDCOE Employees Project (Week 4 of 10)
- **Sample:** Unified Communications Project (Phase 3, Week 2 of 5)
## Status Report Format

### Project Name: ________________________________________

<table>
<thead>
<tr>
<th>Reporting Period</th>
<th>Prepared By</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Month XX-XX, 2022 (Week X of X)</td>
<td>Enter Project Manager Name</td>
<td>List the status</td>
</tr>
</tbody>
</table>

### Accomplishments
- Start with a past tense verb (Example: “Completed the Project Charter”)
- X
- X

### In Progress
- Start with an “-ing” verb (Example: “Working on the Communications Plan”)
- X
- X

### Next Steps
- Start with a verb (Example: “Schedule meeting with the Advisory Committee”)
- X
- X

### Risks/Mitigation
- Example: “Short timelines to complete the project – mitigation: hold daily standups to ensure the project is on track”
- X
- X

These are the standardized status names and colors to use:

<table>
<thead>
<tr>
<th>Status Color</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>On Track (and Complete for the final status report)</td>
</tr>
<tr>
<td>Orange-Yellow</td>
<td>At Risk</td>
</tr>
<tr>
<td>Red</td>
<td>High Risk</td>
</tr>
<tr>
<td>Blue</td>
<td>On Hold</td>
</tr>
</tbody>
</table>
Project Name

WEEKLY STATUS REPORT

Reporting Period: Month XX-XX, 2022 (Week X of X)
Prepared By: Project Manager Name
Current Status: On Track

Project Schedule

<table>
<thead>
<tr>
<th>Phase Name</th>
<th>Phase Name</th>
<th>Phase Name</th>
<th>Phase Name</th>
<th>Phase Name</th>
<th>Closure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>In Progress</strong></td>
<td>Month X - Month X X weeks</td>
<td>Month X - Month X X weeks</td>
<td>Month X - Month X X weeks</td>
<td>Month X - Month X X weeks</td>
<td>Month X - Month X X weeks</td>
</tr>
</tbody>
</table>

Accomplishments

- Start with a verb (Example: “Completed the Project Charter”)
- X
- X

In Progress

- Start with a verb (Example: “Working on the Communications Plan”)
- X
- X

Next Steps

- Start with a verb (Example: “Schedule meeting with the Advisory Committee”)
- X
- X

Risks/Mitigation

- Example: “Short timelines to complete the project – mitigation: hold daily Standups to ensure the project is on track”
- X
- X
ServiceNow Education for SDCOE Employees

WEEKLY STATUS REPORT

Reporting Period: March 22-26, 2021 (Week 4 of 10)
Prepared By: Peyri Herrera

Current Status: On Track

Project Schedule

Our key date for this project is **Tue, April 20**, which is the date of the training meeting for Executive Assistants, Administrative Assistants, and Program Secretaries.

<table>
<thead>
<tr>
<th>Planning</th>
<th>Prep</th>
<th>Execution</th>
<th>Closure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
<td>In Progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar 1-19</td>
<td>Mar 22 - Apr 13</td>
<td>Apr 14-30</td>
<td>May 1-7</td>
</tr>
<tr>
<td>3 weeks</td>
<td>3.5 weeks</td>
<td>2.5 weeks</td>
<td>1 week</td>
</tr>
</tbody>
</table>

Accomplishments

- Established the date/time of our training meeting for Executive Assistants, Administrative Assistants, and Program Secretaries and anyone else interested: **Tue, April 20 from 10:00-10:45 am** (Tyler and Peyri will present)
- Collected and reviewed feedback from 14 Admin Assistants about their experience with ServiceNow to help guide the design of the job aid
- Created the shell of the job aid (see Appendix A)
- Set up shared spreadsheet to capture baseline metrics for “side-door” requests
- CSS tracked their “side-door” counts for Week 1 of 4 – this week there were 141 direct requests for assistance (see Appendix B)
- Created a spreadsheet of the Executive Assistants, Administrative Assistants, and Program Secretaries (approximately 70 staff)
- Established a meeting date with Stacy Brandt to discuss the communications plan – meeting is **Tue, April 6**
- Emailed Leo Cole to request a meeting
- Reached out to Alicia Butters to ask about participating at an upcoming COMET meeting

In Progress

- Developing the job aid
- Drafting the message to send to Executive Assistants, Administrative Assistants, and Program Secretaries to invite them to the training meeting
- Drafting the “friendly script” that CSS and other agents will use when employees continue to not use the system to submit a ticket
- Uyen is determining with CrossFuze if it is safe to change the “I am having trouble with” search box for an Incident to a Contains search instead of Begins With (for better usability) – otherwise we can train users to start their search with an asterisk (*)
- Uyen is reaching out to owners of requestable items that are still available in Incident to let them know they will be removed from “I am having trouble with” menu – those items will be retired next week
- Uyen/Eduardo are assisting with creating a ServiceNow Excel report to show the usage of the system to include as part of our baseline metrics
**Next Steps**
- Finish the draft of the job aid next week and review it
- Begin writing the script for the short instructional video
- On March 30, send the invite to the Executive Assistants, Administrative Assistants, and Program Secretaries (three weeks ahead of the April 20 meeting)
- Meet with Stacy, Leo, and Alicia
- Uyen will look into improving the visibility of the “SDCOE Staff Login” link
- Uyen will find out the limitations we have for the Request Something and Report a Problem descriptions and if we can add a hyperlink in this area

**Risks/Mitigation**
- None.

Please see the appendices on the next page.
APPENDIX A: JOB AID

This is the design of the job aid for SDCOE employees. Page 1 includes “the why” and outlines the difference between Request Something and Report a Problem. Page 2 shows how to log in. The subsequent pages are to explain how to report a problem, request something, make an in-person support appointment, how to use the knowledgebase, and FAQs.

APPENDIX B: WEEK 1 “SIDE-DOOR” REQUESTS

We are establishing baseline metrics to track the number of “side-door” requests made to CSS staff. These are the counts for Week 1.

<table>
<thead>
<tr>
<th>CSS Team Member</th>
<th># of Direct Emails</th>
<th># of Direct Teams Chats</th>
<th># of Direct Phone Calls</th>
<th># of Walk-by/ Drop-ins</th>
<th># of OTHER</th>
<th>Weekly Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jimenez, Hector</td>
<td>3</td>
<td>15</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>24</td>
</tr>
<tr>
<td>Lee, Lamont</td>
<td>2</td>
<td>10</td>
<td>8</td>
<td>1</td>
<td>0</td>
<td>21</td>
</tr>
<tr>
<td>Lloyd, Mike</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Lopez, Rick</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Muenkel, George</td>
<td>4</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>Petro, Tyler</td>
<td>18</td>
<td>7</td>
<td>4</td>
<td>2</td>
<td>0</td>
<td>31</td>
</tr>
<tr>
<td>Smith, Jesse</td>
<td>9</td>
<td>10</td>
<td>9</td>
<td>23</td>
<td>0</td>
<td>51</td>
</tr>
<tr>
<td>Total</td>
<td>39</td>
<td>47</td>
<td>28</td>
<td>27</td>
<td>0</td>
<td>141</td>
</tr>
</tbody>
</table>
Unified Communications Project

WEEKLY STATUS REPORT

Reporting Period: June 15-20, 2020 (Phase 3, Week 2 of 5)
Prepared By: Flora Pourzamani

Current Status: On Track

Accomplishments

- Received all files from Advisory Team for department phone number changes
- Received Steering Committee approval for the process to create teams and the 60-day expiration policy for inactive teams
- Closed out Risk Management’s Microsoft Teams Olympics with an evaluation report and certificates on Tue, 6/16
- Identified the phone job aid to use for Phase 4

In Progress

- Receiving files from Advisory Team for new desk phones and compiling into master list to deliver to Network
- Developing a Teams/Channels guide to implement as the training resource
- Setting up Caller ID masking for two requests (Credentials, Services & Solutions Help Desks) – masking to the selected generic SDCOE number of 858-298-2200
- Discussing and compiling remaining Phase 3 and Phase 4 Governance items to take to the Steering Committee
- Managing incoming questions and adding to FAQ document
- NTT developing training video on advanced phone functionality
- Planning Phone Deployment
- Call group configuration and planning with NuWave
- Obtaining instructions for AT&T Centrex Cisco on how to change voicemail for Monarch and Camp Cuyamaca
- Creating a job aid to instruct employees on functions in Outlook that are connected to Teams
- Office 365 group expiry to retire unused Teams and O365 groups – notification will be sent out to all group owners alerting them of behavior change
- Office 365 group creation for call queues and auto attendants for call tree and department phone groups

Next Steps

- Bi-weekly meetings with Advisory Team begin next week
- Phone registration and updating starting 6/23 with Network Services and CSS staff
- Ali Maroufi to have an approved change management for the DLP in Teams (next week)
- Receive and post the training video from NTT
- Transition planning for questions and support
- Verify with vendor on how to map the caller-id to another number
- Purchase Azure phone licensing for Meeting Room and Common Area phones
- NTT/Nuwave project Phase 2 kickoff
Risks

- Lots of initial excitement about Teams and questions from staff for access – need to keep the momentum going with adoption, create and keep alive the FAQs to provide up-to-date answers
- Numerous tasks still occurring in a short period of time – we continue to rely on Monday.com, status reports, and clear communication to ensure tasks are not forgotten
- Short timelines for Governance – Placing more attention to gathering the items and prioritizing for Steering Committee review
Project Closeout Checklist

• Job Aid: A checklist of closeout activities
# Project Closeout Checklist

Use this checklist to help you close out your project.

## 1. Lessons Learned
- Identify and document lessons learned.
  - Conduct a thorough postmortem process.
  - Gather feedback from all stakeholders.
  - Highlight important issues that will help improve the quality, 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 project sponsor and steering committee.
  - Generally you will include a Project Overview, Survey Results, Lessons Learned, and What’s Left.
  - Present the final report prior to conducting your Celebration.

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

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

## 6. Other Closeout Items
- Hand over project ownership, if necessary. Transfer management of the completed project to the new owner.
- Settle payments, if necessary. Process outstanding invoices. Note down variances, cost efficiencies, and other financial information that will help you optimize the budget for the next project.

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

---

Hooray, you did it!
Lessons Learned Meeting

- **Template:** Blank Lessons Learned Worksheet (AVAILABLE IN WORD)
- **Sample:** ServiceNow Education for SDCOE Employees Project
- **Sample:** Unified Communications Project
PROJECT NAME
Lessons Learned Worksheet

*Team 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
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
Unified Communications Project Lessons Learned

Overview

At the conclusion of the Unified Communications Project, the Enterprise Project Management Office (EPMO) conducted Lessons Learned meetings with the following groups:

- Core Project Team: Network/EPMO
- Advisory Team
- Computer Support Services

Team members were asked: What went well with the project? What did not go well? What advice would you give for the next large-scale project?

All responses were analyzed and grouped into three themes: People, Process, and Technology. The purpose of this report is to share the summary of our lessons learned to apply to future projects.

People

Training & Support

- Researched existing material and tailored to SDCOE employees
- Training was comprehensive and a good pace
- Job aids/videos were helpful, easy to access and easy to understand
- 41 training sessions with 878 people
- Tips and Tricks roadshows
- COMET workshops to support managers
- Office Hours provided 11-12 daily

Communication

- Helpful, precise and clear
- Communication was timely and to the point
- Common Ground banners, email communications, article in the monthly Inspire newsletter
- Ease of sharing issues, concerns and solution
- Teams group chats provided opportunity for continuous feedback both direction

Early Adopters

- Piloted features and training materials
- Olympic Activities helped learning in a fast pace
- Opportunity to learn while teaching

Advisory Team

- It would not have been as big of an adoption and as fast without them
- Have someone familiar within each division to be the champion
- Appreciation for personal touch/familiar with day to day challenges
- It did not feel like top down ITS dictating
Collaboration

- Involving all the teams from beginning (CSS, Network, Training)
- Everyone knew what was happening every step of the way with current information
- Felt included and informed
- Everyone came together and worked as a team, no distinction that we were separate teams

Process

Planning

- Well planned, managed and coordinated
- Understanding of the scope, timelines and phases
- Communication plan and definition of success
- Weekly Governance meetings
- EPMO team keeping us on track
- Clear picture of overall project, where it is headed and what to expect
- Established lot of standards, templates and best practices

Rollout

- Very organized rollout/well planned
- Rollout was well constructed with a timeline by weeks
- Project was well executed
- Clearly defined roles and responsibilities
- Increasing scale was well planned and executed

Tools to Manage the Project

- Utilized Monday.com to manage the project
- A Teams group chat was used with the Advisory Team
- A Teams group chat was used with the Core Team
- A Teams team was used to manage shared files

Technology

Tasks

- Teams was easy to learn
- Global adoption of Teams built confidence that it is here to stay
- Phone installations were well tested and executed
- Network staff did a great job of configuration

Vendor

- Limited training from NuWave
- Never got the training promised
- Product was not ready in time as promised
- Microsoft failure to address licensing issue and delayed the project by 2 weeks
Challenges

- Aggressive timelines
- Had scope creep but was able to get caught up
- Distant working
- Change management
- Fast pace timelines with phone installation and all Teams features
- Learning and teaching at the same time
Survey

- **Template:** Blank Survey Design Document (AVAILABLE IN WORD)
- **Sample:** ServiceNow Education for SDCOE Employees Project
- **Sample:** Unified Communications Project
[Insert Project Name] Survey Questions

Survey Link for Participants to Respond:
[Insert Link]

Survey Link for Owners to Edit/View Responses:
[Insert Link]

Survey Name:
[Insert Project Name] Survey

Opening Text:
PURPOSE: The ITS division is interested in hearing your feedback about the [Insert Project Name], [Insert Purpose of Project]. How did we do? Your input will help us improve our service and future projects.

SURVEY TIMEFRAME: [Insert Date Range]

CONTACT: Please contact [Insert Name] ([Insert Email Address]) with any questions about this survey.

Questions:
* = Required

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

• *Q2. Which training opportunities did you participate in between [Insert Start Month] and [Insert End Month]? (Mark all that apply) [MULTIPLE CHOICE]
  o One-hour online live training in [Insert Month] to learn the basics
  o One-hour online live training in [Insert Month] to learn tips and tricks
  o Self-Study – Read a job aid
  o Self-Study – Watched a recorded video
  o COMET workshop in [Insert Month] to learn about the project rollout
  o Other __________________
  o None of these
• Q3. On a scale of 1-4 (where 1 is Strongly disagree and 4 is Strongly agree), to what extent do you agree with these statements that [Insert software] improves the way you work? [LIKERT SCALE]

Scale:
1 Strongly disagree
2 Disagree
3 Agree
4 Strongly agree

A. [Insert Statement]
B. [Insert Statement]
C. [Insert Statement]
D. [Insert Statement]

• Q4. Do you agree with the following statements about the training materials? (Yes, No, N/A) [LIKERT SCALE]

A. [Insert Statement]
B. [Insert Statement]
C. [Insert Statement]
D. [Insert Statement]

• Q5. If No to either, would you please tell us why? (OPTIONAL) [TEXT BOX]

• Q6. Who helped keep you “in the know” about the [Insert Project Name]? (Mark all that apply) [MULTIPLE CHOICE]
  o My assistant superintendent or other Leadership
  o My supervisor
  o A co-worker or colleagues
  o The Project Team
  o The SDCOE Communications Team (Common Ground, weekly news, etc.)
  o Other __________________
  o None of these

• Q7. What do you think we did well with this project? (OPTIONAL) [TEXT BOX]

• Q8. Where could we have improved? (OPTIONAL) [TEXT BOX]

• Q9. Do you have any additional comments or feedback you would like to provide? (OPTIONAL) [TEXT BOX]

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
- [x] Only people in my organization can respond
  - [x] Record name
  - [x] One response per person
- [ ] Specific people in my organization can respond

- [x] 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
- [x] Allow receipt of responses after submission
- [ ] Get email notification of each response
ServiceNow Education Project Survey Questions

Survey Link for Participants to Respond:
https://forms.office.com/Pages/ResponsePage.aspx?id=nsds_Wl70ES4za9KECvQ1ltT7sgeYZKvSb2zvqNLgNURFk5TDZBUkRQM0JaNU1RVEs5Q1VWQi4u

Survey Link for Owners to Edit/View Responses:
https://forms.office.com/Pages/DesignPage.aspx?fragment=FormId%3Dnsds_Wl70ES4za9KECvQ1ltT7sgeYZKvSb2zvqNLgNURFk5TDZBUkRQM0JaNU1RVEs5Q1VWQi4u%26Token%3Df0c689a4ccdc4d7185c064d1b103f2f8

Survey Name:
ServiceNow Training Meeting April 20 (POST-MEETING SURVEY)

Opening Text:
The survey will take approximately 4 minutes to complete.

PURPOSE: The ITS division is interested in hearing your feedback about the ServiceNow Training Meeting conducted by Peyri Herrera and Tyler Petro on April 20. How did we do? Your input will help us improve our service and future projects.

SURVEY TIMEFRAME: Tuesday, May 4 - Thursday, May 6, 2021 at 5 pm

CONTACT: Please contact Peyri Herrera (pherrera@sdcoe.net) with any questions about this survey.

Questions:
* = Required

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

- *Q2. How did you attend the training meeting? [MULTIPLE CHOICE]*
  - I attended the Teams meeting on April 20 at 10 am
  - I watched the recorded video of the training
  - I did not attend the training or watch the video

- *Q3. How many people do you submit ServiceNow tickets for? [MULTIPLE CHOICE]*
  - 1 – Just me
  - 2-4 people
  - 5-10 people
• 11-30 people
• 31+ people

• *Q4. What 2 adjectives would you use to describe the training meeting? Please separate your two words with a comma. (Example: Adjective1, Adjective2) [TEXT BOX]  
  ○ Open-ended

• *Q5. TRUE OR FALSE: By attending the training meeting (or watching the video)... 'N/A' is intended for Item 5C (for people who are in a support role).  
  [LIKERT SCALE]

<table>
<thead>
<tr>
<th></th>
<th>TRUE - I learned something new!</th>
<th>FALSE - I already knew everything presented</th>
<th>N/A - This doesn’t apply to me</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. I now know the expected procedure for requesting tech support using ServiceNow (and to not directly contact a Help Desk team member)</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>B. I have clarity on how to submit a ticket, including how to differentiate a Request from an Issue</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>C. I am better equipped to help the people I support</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

• Q6. If you learned something new at the meeting or had a specific takeaway, would you please tell us what that was? (OPTIONAL) [TEXT BOX]  
  ○ Open-ended

• *Q7. To what extent do you agree with the following statements about our job aid and 5-minute instructional video? Please use a scale of 1-4 (where 1 Strongly Disagree and 4 is Strongly Agree). For reference, the links to these 2 resources are available at https://sdcoe2.sharepoint.com/teams/ITS/Pages/ITS_Documents.aspx [LIKERT SCALE]
<table>
<thead>
<tr>
<th></th>
<th>1 Strongly Disagree (WORST)</th>
<th>2 Disagree</th>
<th>3 Agree</th>
<th>4 Strongly Agree (BEST)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. The new 5-minute INSTRUCTIONAL VIDEO is clear, concise, and easy to follow</td>
<td>o</td>
<td></td>
<td></td>
<td>o</td>
</tr>
<tr>
<td>B. The new JOB AID is clear, concise, and easy to use</td>
<td>o</td>
<td></td>
<td></td>
<td>o</td>
</tr>
</tbody>
</table>

- **Q8.** Have you shared the INSTRUCTIONAL VIDEO or JOB AID with others? If so, please share a few details (how many people, feedback received, etc.).
  
  *The links to these 2 resources are available at https://sdcoe2.sharepoint.com/teams/ITS/Pages/ITS_Documents.aspx [TEXT BOX]*
  - Open-ended

- **Q9.** Are there any other ServiceNow topics that you would like to have seen covered at the meeting? [TEXT BOX]
  - Open-ended

- **Q10.** Do you have any additional comments or feedback you would like to provide? (OPTIONAL) [TEXT BOX]
  - Open-ended

*Thank You Message (Upon Submit):*
Thank you for providing us your feedback about the ServiceNow Training Meeting. 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).
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

Options for responses
- Accept responses
- Start date
- End date
  
  5/6/2021 5:00 PM

- Shuffle questions
- Show progress bar
- Customize thank you message

Thank you for providing us your feedback about the ServiceNow Training Meeting. 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
Unified Communications Project Survey Questions

Survey Link for Participants to Respond:
https://forms.office.com/Pages/ResponsePage.aspx?id=nsds_Wl70ES4za9KECvQ1ltTi7sgeYZKvSb2zvqNLgNUODNIMVE4Ujc0M1I5WkoyMTZGU05BT0RLRy4u

Survey Link for Owners to Edit/View Responses:
https://forms.office.com/Pages/DesignPage.aspx?fragment=FormId%3Dnsds_Wl70ES4za9KECvQ1ltTi7sgeYZKvSb2zvqNLgNUODNIMVE4Ujc0M1I5WkoyMTZGU05BT0RLRy4u%26Token%3D36143e482279413c9d46ec21b14c8182

Survey Name:
Unified Communications (Microsoft Teams) Survey

Opening Text:
PURPOSE: The ITS division is interested in hearing your feedback about the Unified Communications Project, the large-scale effort from April to September 2020 to roll out Microsoft Teams, provide new work phone numbers, and provide a new way to make phone calls for all SDCOE employees. How did we do? Your input will help us improve our service and future projects.

SURVEY TIMEFRAME: September 3-13, 2020

CONTACT: Please contact Peyri Herrera (pherrera@sdcoe.net) with any questions about this survey.

Questions:
* = Required

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

- **Q2. Which training opportunities did you participate in between May and August? (Mark all that apply)**
  - One-hour online live training in May/June to learn the basics (“Intro to Teams”)
  - One-hour online live training in August to learn tips and tricks (“Taking Teams To the Next Level”)
  - Self-Study – Read a job aid
  - Self-Study – Watched a recorded video
  - COMET workshop in May to learn about the project rollout
  - COMET workshop in July to learn about the Teams function
Microsoft Teams Olympics training program
Other __________________
None of these

*Q3. On a scale of 1-5 (where 5 is Agree and 1 is Disagree), to what extent do you agree with these statements that Microsoft Teams improves the way you work?

Scale:
1 Disagree
2 Slightly disagree
3 Neutral
4 Slightly agree
5 Agree

A. I have an easier/better way to make phone calls and access voicemail than the old system
B. I have an easier/better way to communicate with coworkers (1:1 chat, group chat, video calls, voice calls)
C. I have an easier/better way to work on shared files with others (1:1 chat, group chat, teams)
D. I have an easier/better way to find and contact other SDCOE employees
E. I am more productive as a result of Microsoft Teams

*Q4. Do you agree with the following statements about the training materials? (Yes, No, N/A)

A. I know where on Common Ground to access online training materials produced by SDCOE (e.g. job aids, videos)
B. I found the training materials to be clear and helpful (e.g. job aids, videos)

*Q5. If No to either, would you please tell us why?

*Q6. Who helped keep you “in the know” about the Microsoft Teams rollout, your new work number, and the new way to make phone calls? (Mark all that apply)

My assistant superintendent or other Leadership
My supervisor
A co-worker or colleagues
The Project Team (ITS staff, my division’s Advisory Team member, etc.)
The SDCOE Communications Team (Common Ground, weekly news, etc.)
Other __________________
None of these
• Q7. What do you think we did well with this project? This is in reference to how we rolled out Microsoft Teams (including training and workshops), issued new work numbers, and installed new desk phones. (Not required. Open ended.)

• Q8. Where could we have improved? (Not required. Open ended.)

• Q9. Do you have any additional comments or feedback you would like to provide? (Not required. Open ended.)

Thank You Message (Upon Submit):
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).
**Settings (Adjust As Needed):**

Who can fill out this form
- Anyone can respond
- Only people in my organization can respond
- Specific people in my organization can respond

Options for responses
- [x] Accept responses
- [ ] Start date
- [x] End date

9/14/2020 10:30 AM

- [ ] Shuffle questions
- [ ] Show progress bar
- [x] 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
- [x] Allow receipt of responses after submission
- [ ] Get email notification of each response
Final Report Presentation

• **Job Aid:** A checklist of the components of a final presentation (AVAILABLE IN POWERPOINT)

• **Sample:** SDCOE Secure Access MFA Project
Final Presentation Components

Your Goal: Create a final report that you can present to your project sponsor and steering committee. The template is set up for you to include a Project Overview, Survey Results, Lessons Learned, and What’s Left. You can tailor the PowerPoint as needed. When you present the final report, be sure to allow time for questions and comments. Please present the final report prior to conducting your Celebration.

☐ 1. Project Overview. Provide a high-level recap of your project. Copy/paste/duplicate from your Project Charter or Kickoff Meeting Presentation. Tell the story. State the ‘why’!

- Project Goals and Objectives
- Board Goals and ITS Goals this project was aligned with
- Project Team Members
- Deliverables and Outcomes
2. Survey Results. If you conducted a survey, share the results. Provide the interpretation – what did the survey tell you? TIP: If your survey yielded 80 comments, comb through the responses and categorize them into main themes – in your presentation speak to the main themes. Then pick a few quotes from the respondents to illustrate those themes. If you choose to include all comments, you can always hide that slide during your presentation but have the information included in the file.

3. Lessons Learned. Summarize what worked well, where improvements can be made for next time, and what the project team was proud of, or any other lessons learned. TIP: If your lessons learned meeting yielded 80 bullet points, comb through the information and categorize them into main themes – in your presentation speak to the main themes.

4. Next Steps / What’s Left. If there are additional activities to complete for the project, list them.
This report was presented to the Sponsor and Steering Committee after the Lessons Learned and Stakeholder Surveys were completed.

---

**Title Slide**

**Agenda / Contents**

**Project Goal & Objectives**

**The Project Team**

**Phases**

**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

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.

Survey Results

MFA Survey Results

Survey Tool
- 10-question survey developed in Microsoft Forms, same survey used each phase
- What would you change if you could do it again?
- Better interface, more options
- Clearer instructions

Survey Results Summary

Across all phases, a high percentage of SDCOE Employees agreed:

- The USB security key (Yubikey) authentication method is easy
- They understand the importance of MFA
- The job aids provided were clear and easy to follow (and they liked the videos provided in the latter phases)
- Their MFA questions and issues were answered in a friendly and timely manner

Comparison Chart

<table>
<thead>
<tr>
<th>SDCOE Managers</th>
<th>PHASE 1A</th>
<th>PHASE 1B</th>
<th>PHASE 2</th>
<th>PHASE 3</th>
</tr>
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<tbody>
<tr>
<td>75%</td>
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<td>54%</td>
<td>71%</td>
<td></td>
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<td>54%</td>
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<td>54%</td>
<td>54%</td>
<td></td>
</tr>
</tbody>
</table>

Stakeholder Survey Process

Survey Data

SDCOE Secure Access Project

What's Left?
- Celebration on Thursday, Dec. 16 at 3:00 pm
- Final meeting with Ali Maroufi to review and sign off

Open Floor Discussion
Any thoughts, comments, or questions you’d like to discuss?
Celebration

- **Template:** Project Celebration Template  
  (AVAILABLE IN POWERPOINT)
- **Sample:** Unified Communications Project
- **Sample:** ServiceNow Request Management Project
- **Sample:** Statewide Reporting Dashboard 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.).
An “ABC Recognition” allowed each team member to be acknowledged, as well as the team members’ collective attributes (achiever, adaptable, bright, brainy, etc.).
Random “awards” were created. Time was provided for shoutouts and team recognition.
Organizational Change Management (OCM)

- **Job Aid:** An OCM cheat sheet
- **Job Aid:** ADKAR Model
- **Job Aid:** Lippitt-Knoster Model
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.

   AWARENESS
   DESIRE
   KNOWLEDGE
   ABILITY
   REINFORCEMENT

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)

<table>
<thead>
<tr>
<th>Adoption Technique</th>
<th>CATEGORY 1 Innovator</th>
<th>CATEGORY 2 Early Adopter</th>
<th>CATEGORY 3 Early Majority</th>
<th>CATEGORY 4 Late Majority</th>
<th>CATEGORY 5 Laggard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proof of Concepts</td>
<td>✗</td>
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This cheat sheet was prepared by the SDCOE Enterprise Project Management Office (EPMO).
For more details, please refer to the OCM Strategies for Your Project workshop materials at https://epmo.sdcoe.net.
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.