



Get Started with Project Management: “Starter Kit Session”

2024 ACSA Classified Education Leaders Institute

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Enterprise Project Management Office (EPMO) | Feb. 23, 2024

MEET OUR TEAM



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

-Tony Montana
Scarface

Peyri Herrera
Senior Director
Integrated Technology Services



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

-Darth Vader
Star Wars

Reesa Fickett, PMP
Senior Project Manager
Integrated Technology Services



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

-Lt. Colonel Kilgore
Apocalypse Now

Andrew Baldwin, PMP
Project Manager
Integrated Technology Services



“
*Live long,
and provide
status reports.*

-Spock
Star Trek

Candace Wong
Project Management Assistant
Integrated Technology Services



san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES™

**Enterprise
Project
Management
Office**



epmo.sdcoe.net



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

What's going
on in your
department?



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

PLANNING PHASE
EXECUTION PHASE
CLOSURE PHASE

Session Goals

01

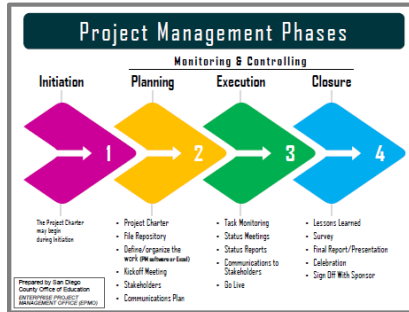
"I know the major **phases of project management**."

02

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

03

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



Start here

PLANNING

EXECUTION

CLOSURE

Project Charter **DRAFT**

Project authorized by _____ on _____

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

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

Project Manager
The project manager is responsible for engaging the project and for its success. Indicate all project team members and how frequently you will communicate with them.

Steering Committee
The steering committee is responsible for providing guidance and oversight to the project manager.

Project Team
The project team is responsible for executing the project plan and reporting progress to the project manager.

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

Scope
What is the scope of this project? What is included (or not included) that can help manage the expectations?

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

SCODE Integrated Technology Services (ITS)

PROJECT MANAGEMENT TOOLKIT

Key Activities of the Execution Phase

Key Project Management Activities During Execution	
1	Monitor progress, keep track of the calendar
2	Monitor the project plan frequently. Team members should update their status.
3	Check in with team members as needed. Establish rapport with the team; make sure they are all on the same page.
4	Lead status meetings. Meeting duration and frequency will vary. These are typically short daily meetings.
5	Identify new activities or add to the plan. Watch out for scope creep (new starts).
6	Monitor risks. Quickly address any risks.
7	Monitor budget, if required. Track project costs.
8	Prepare and send status reports. Capture accomplishments.
9	Communicate up and out when needed. Stay in touch with your steering committee and sponsor.
10	Prepare for Go Live. Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.

SCODE Integrated Technology Services (ITS)

Go Live Checklist (Starting Point)

Testing and Sign Off

Support Team

Training & Communication

Go / No Go Meeting

Are we ready? Is it a go?

PROJECT MANAGEMENT TOOLKIT

Project Closeout Checklist

Use this checklist to help you close out your project.

1. Lessons Learned <ul style="list-style-type: none"> Identify and document lessons learned. Conduct a thorough post-mortem process. Gather feedback from all stakeholders. Highlight important issues that will help improve the efficiency, value, workflow, speed of completion, cost-efficiency, and team synergy of the next project. Use this information in your Final Presentation. 	2. Survey <ul style="list-style-type: none"> 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 <ul style="list-style-type: none"> 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 Next. Present the final report prior to conducting your celebration. 	4. Celebration <ul style="list-style-type: none"> A celebration and camaraderie can help energize everyone for the next project. Make it fun. Leverage prizes 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 <ul style="list-style-type: none"> Archive project documentation. Archive resources that used in the project from start to finish. This includes project files, meeting minutes, and when you sign off with your Project Sponsor, explain what was achieved. Has the go live date and other important information been communicated to all project stakeholders? Has the go live date and other important information been communicated to all project stakeholders? 	6. Other Closeout Items <ul style="list-style-type: none"> Hand over project ownership. If necessary, transfer management of the completed project to the new owner. Settle payments, if necessary. Process outstanding financial information that will help you optimize the budget for the next project.
7. Sign Off with Project Sponsor <ul style="list-style-type: none"> Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction. 	<p>Hooray, you did it!</p>

SCODE Integrated Technology Services (ITS)

Project Management Toolkit

<https://epmo.sdcoe.net>

RESOURCES


Intro Project Charter Project Plan Status Meetings and Reports Execution and Launch Closure


Soft Skills **PM Toolkit** More

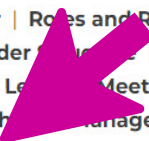
SDCOE has created an 82-page **Project Management Toolkit** based on Project Management Institute's tools and procedures. This toolkit is free to use and includes samples and templates that are designed to help you complete projects on time, in scope, and under budget.

The toolkit covers these subjects:

Project Management Phases | Project Charter | Roles and Responsibilities | Project Plan | Communications Plan | Kickoff Meeting | Folder Management | Execution Phase Activities | Status Report | Project Closeout Checklist | Lessons Learned Meeting | Survey | Final Report Presentation | Celebration | Organizational Change Management (OCM)

 [SDCOE Project Management Toolkit v5.0 \[PDF\]](#)

 **Videos**

 **Files**



01

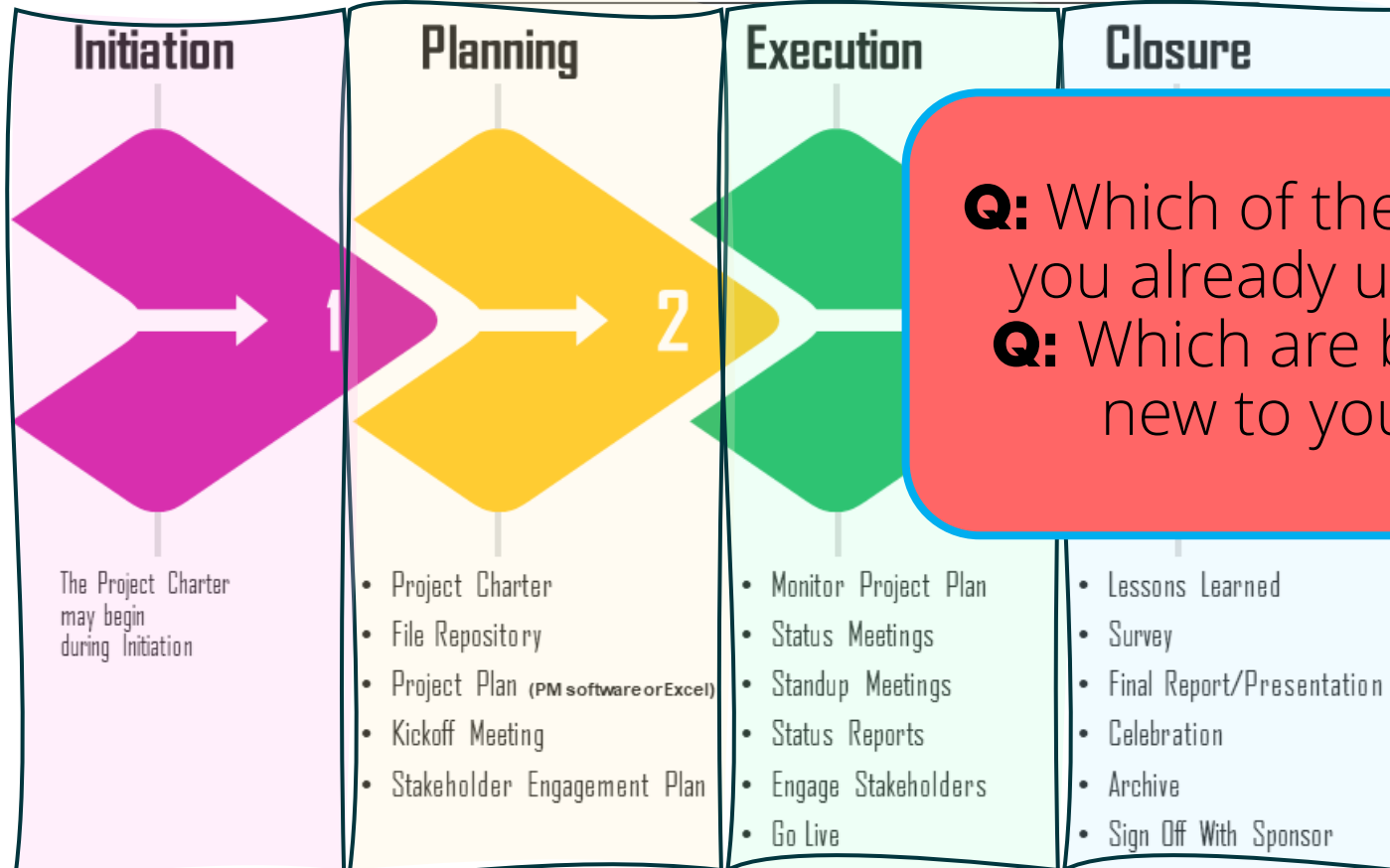
PROJECT MANAGEMENT PHASES

Planning, Execution, and Closure



Project Management Phases

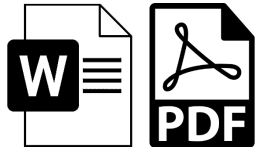
Monitoring & Controlling



02

THE PROJECT CHARTER

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



The Project Charter

Authorization • Planning • Expectations • Clarity

Project Charter DRAFT

Project authorized by _____ on _____

I. Project Name

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

II. Project Organization

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 efforts, responsible for achieving the project objectives. • X	Sponsor Has the decision-making authority to engage the project and fund it; has ultimate authority and responsibility for the project. • X
Steering Committee High-level group that guides the project manager in making decisions and resolving the project issues. • X	Stakeholders An individual, group, or organization that may affect or be affected by outcomes of the project. • X
Project Team Supports the project manager in performing work of the project in order to deliver the project. • X	Others Involved List anyone else who will be involved and state their role. • X

III. Project Details

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

Scope
What is the project's purpose and what is included (or not included) that can help manage the expectations?
In scope:
• X
Out of scope:
• X

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

SDCDE Integrated Technology Services (ITS) Project Charter | 1

I. Project Name

Project Name X

Start Date XX/XX/XX

End Date XX/XX/XX

The Project Charter

Authorization • Planning • Expectations • Clarity

Project Charter DRAFT

Project authorized by _____ on _____

I. Project Name

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

II. Project Organization

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

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

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

In scope:

- X

Out of scope:

- X

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

- X

SCOE Integrated Technology Services (ITS) Project Charter | 1

II. Project Organization

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

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

The Project Charter

Authorization • Planning • Expectations • Clarity

III. Project Details

Project Description

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

X

Scope

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

In scope:

- X

Out of scope:

- X

Deliverables

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

- X

Project Charter DRAFT

Project authorized by _____ on _____

I. Project Name

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

II. Project Organization

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

Project Manager	Sponsor	Stakeholders	Others Involved
<small>Oversees the project work plan, reports on status, leads project team efforts, responsible for achieving the project objectives.</small>	<small>No top position holder authorized to engage the project and hold it has ultimate authority and responsibility for the project.</small>	<small>An individual, group, or organization that may affect or be affected by outcomes of the project.</small>	<small>List anyone else who will be involved and state their role.</small>
<ul style="list-style-type: none">• X	<ul style="list-style-type: none">• X	<ul style="list-style-type: none">• X	<ul style="list-style-type: none">• X
Steering Committee <small>Key people that assist the project manager in making decisions and provide the project team with resources.</small>			
<ul style="list-style-type: none">• X			
Project Team <small>Supports the project manager in performing work of the project in order to deliver the project.</small>			
<ul style="list-style-type: none">• X			

III. Project Details

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

X

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

In scope:

- X

Out of scope:

- X

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

- X

SDCCE Integrated Technology Services (ITS) Project Charter | 1

The Project Charter

Authorization • Planning • Expectations • Clarity

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

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

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

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

- X

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

- X

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

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

SDCOE Integrated Technology Services (ITS) Project Charter | 2

Goals Alignment

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

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

Objectives/Success Criteria

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

- X

Risks

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

- X

The Project Charter

Authorization • Planning • Expectations • Clarity

IV. Project Schedule & Milestones

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

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

Goals Alignment

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

- ☐ B01 Connect the educational experience to the world of work
- ☐ B101 Maximize Customer Success
- ☐ B02 Provide educational opportunities and exposure to SCOC's schools and virtual classes
- ☐ B102 Create Value
- ☐ B03 Advance the fabric and model for education
- ☐ B103 Improve Student Outcomes
- ☐ B04 Maximize human and operational resources to strengthen the organizational culture of SCOC
- ☐ B104 Process/Design/Support

Objectives/Success Criteria

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

- X

Risks

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

- X

IV. Project Schedule & Milestones

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

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

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

WHO

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

WHAT

- What is the project?
- What are the goals?

(WHERE)

- Which locations?
- etc.?

WHEN

- What is the timeline?

WHY

- Why are we doing this project?

HOW

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

Q: How does the project charter facilitate communication and involvement of stakeholders?

03

EXECUTION PHASE CHECKLIST

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



PROJECT MANAGEMENT TOOLKIT

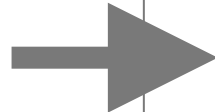
What are the key activities of the Execution Phase?











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

WORD BANK

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

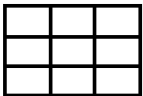
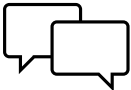
Please
find
this page!





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

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


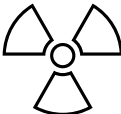

Key Activities of the Execution Phase

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



Key Activities of the Execution Phase

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


Key Activities of the Execution Phase

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

Key Activities of the Execution Phase



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

Key Activities of the Execution Phase



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

Key Project Management Activities During Execution


Monitor progress, keep track of the calendar and milestones

- 1  **Monitor the project plan frequently.**
Team members should update their status and add new tasks.
- 2  **Check in with team members as needed.**
Establish rapport with the team; make sure there are no roadblocks.


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

- 3  **Lead status meetings.**
Meeting duration and frequency will vary by project.
- 4  **Lead standup meetings as needed.**
These are typically short daily meetings (15 min).


Manage the project


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

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


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

Communicate the status of your project

- 8  **Prepare and send status reports.**
Capture accomplishments, in progress, what's next, and risks.

- 9  **Communicate up and out when needed.**
Stay in touch with your steering committee and stakeholders.

Go Live (Become operational)

- 10  **Prepare for Go Live.**
Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.

Take a look at the list...

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

04

GO LIVE CHECKLIST

Get **everyone** ready for your launch!



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



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



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



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

Go Live Checklist (Starting Point)



Testing and Sign Off

☐

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

Support Team

☐

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

Training & Communication

☐

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

Go / No Go Meeting

Are we ready?
Is it a go?

05



PROJECT CLOSEOUT CHECKLIST

Wrap up your project with success
and provide closure for all parties.



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

6. Other Closeout Items

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

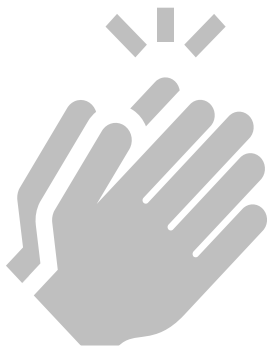


7. Sign Off with Project Sponsor

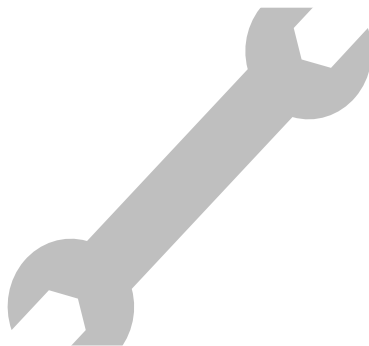
- ☐ Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.

Hooray, you did it!

Lessons Learned



What worked
well?



Where can we
improve?

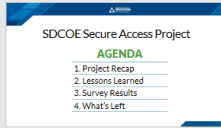


What are you
proud of?

Stakeholder Survey

Comparison Chart	Scores of 3.0 indicate agreement; those that approach 4.0 indicate strong agreement ↑ ↓ The arrows denote a difference of 10% or more			
	ITS Managers PHASE 1A	ITS Staff PHASE 1B	SDCOE Managers PHASE 2	SDCOE Staff PHASE 3
Use YubiKey as primary method	75%	73%	54% ↓	71% ↑
Use Duo Mobile as primary method	31%	25%	54% ↑	32% ↓
Use their personal mobile phone for MFA	78%	58% ↓	71%	64%
Agree the methods are simple	OUT OF 4.0: YubiKey = AVG 3.7 Duo Mobile = AVG 3.4 SMS Text = AVG 3.2	OUT OF 4.0: YubiKey = AVG 3.5 Duo Mobile = AVG 3.6 SMS Text = AVG 3.4	OUT OF 4.0: YubiKey = AVG 3.2 Duo Mobile = AVG 3.2 SMS Text = AVG 3.1	OUT OF 4.0: YubiKey = AVG 3.1 Duo Mobile = AVG 3.0 SMS Text = AVG 2.5
Understand the importance of MFA	100% agreement AVG 3.8	100% agreement AVG 3.8	92% agreement AVG 3.5	87% agreement AVG 3.2
Agree the job aids are clear/easy to follow	100% agreement AVG 3.5	97% agreement AVG 3.4	84% agreement AVG 3.1	86% agreement AVG 3.1
Methods of support used ✓ = highest compared to other phases	Printed job aid = 56% Electronic job aid = 41% Asked a colleague = 41% ✓ ServiceNow ticket = 28% MFA Helpline = 3%	Printed job aid = 80% ✓ Electronic job aid = 30% Asked a colleague = 36% ServiceNow ticket = 16% MFA Helpline = 3%	Printed job aid = 79% Electronic job aid = 49% ✓ Asked a colleague = 28% ServiceNow ticket = 31% MFA Helpline = 17% ✓	Printed job aid = 68% Electronic job aid = 32% Asked a colleague = 34% ServiceNow ticket = 15% MFA Helpline = 10%
Agree questions and issues were answered in a timely manner	100% agreement - AVG 3.5	100% agreement - AVG 3.6	87% agreement - AVG 3.3	94% agreement - AVG 3.3

Welcome and Topics

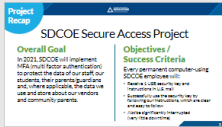


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Project Recap

USE INFO FROM YOUR PROJECT CHARTER...



3

4

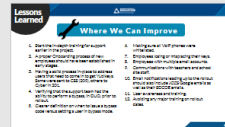
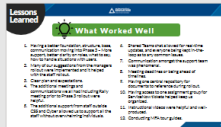
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Lessons Learned

SUMMARIZE YOUR LESSONS LEARNED...



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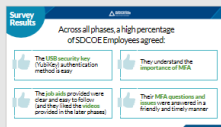
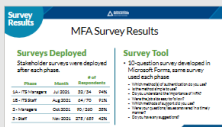
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Survey Results

SUMMARIZE YOUR SURVEY FINDINGS...



Category	Phase 1	Phase 2	Phase 3	Overall
Agreed	75%	75%	84%	78%
Disagreed	25%	25%	16%	22%

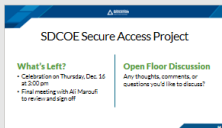
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Wrap Up

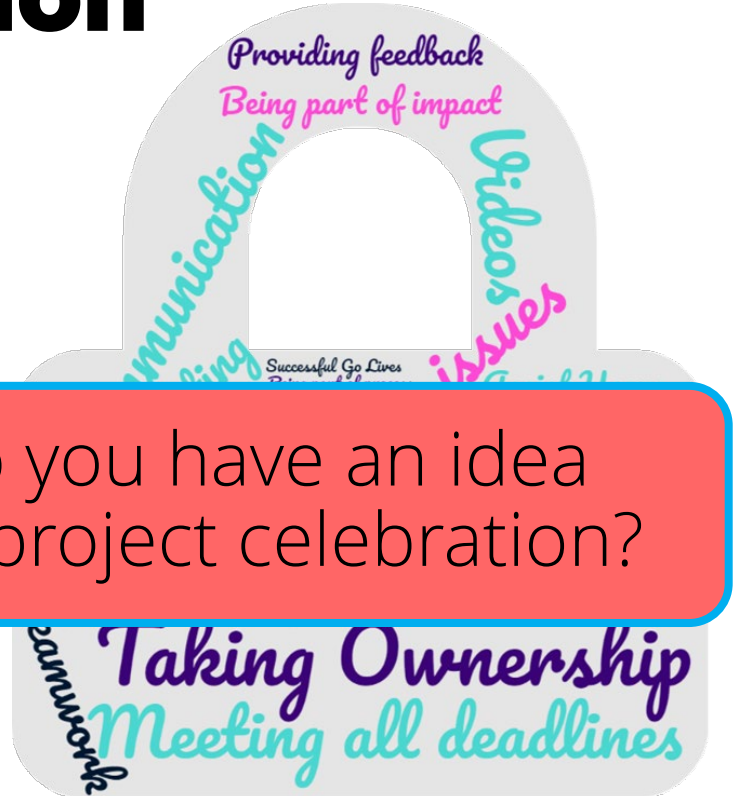
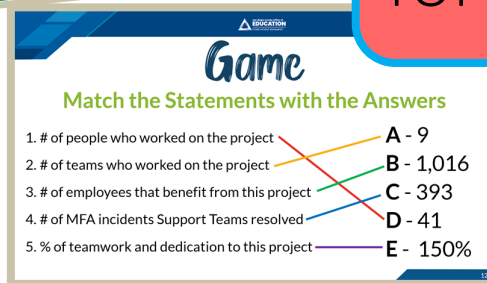
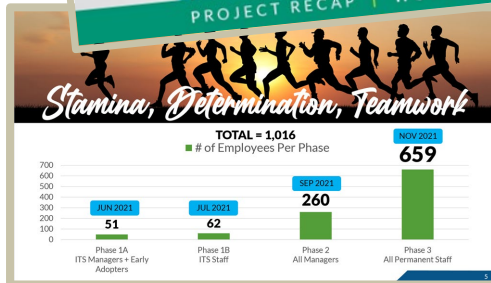
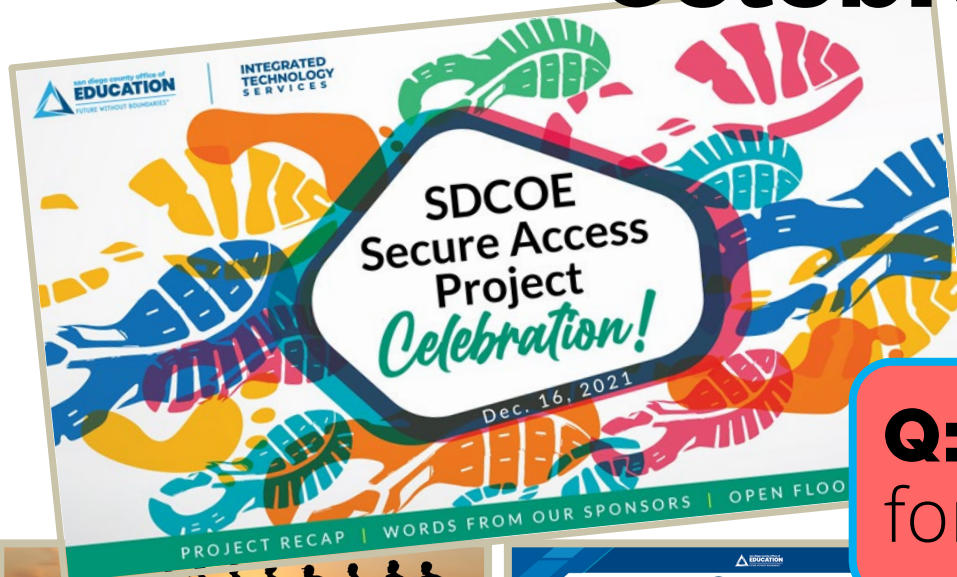
SHARE WHAT'S LEFT



16

Final Report

Celebration



Q: Do you have an idea for a project celebration?

PROJECT MANAGEMENT TOOLKIT

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.**

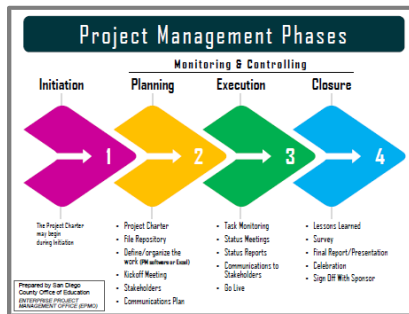
- Archive relevant docs used in the project from start to finish. This includes project files, recorded meetings, and your Monday.com board.
- When you sign off with your Project Sponsor, explain what was archived.



7. Sign Off with Project Sponsor

- ☐ **Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.**

Q: Why do you think it's important to close out your projects?



Q: Which tool are you most excited to try?

PLANNING

Project Charter DRAFT

Project authorized by _____ on _____

I. Project Name
Project Name X

Start Date XXXXXXXX End Date XXXXXXXX

II. Project Organization

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

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

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

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?

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

Out of scope:

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

Project Charter 1.1

SCOE Integrated Technology Services (ITS)

EXECUTION

PROJECT MANAGEMENT TOOLKIT

Key Activities of the Execution Phase

1	Monitor the project progress, keep track of the calendar
2	Check in with team members as needed
3	Lead status meetings
4	Lead standup meetings as needed
5	Identify new activities or add
6	Monitor risks
7	Monitor budget, if required
8	Prepare and send status
9	Communicate up and out when needed
10	Prepare for Go Live

SCOE Integrated Technology Services (ITS)

Key Activities of the Execution Phase

Go Live Checklist (Starting Point)

Testing and Sign Off

Support Team

Training & Communication

Go / No Go Meeting

Are we ready? Is it a go?

CLOSURE

PROJECT MANAGEMENT TOOLKIT

Project Closeout Checklist

Use this checklist to help you close out your project.

1. Lessons Learned	2. Survey
3. Final Presentation	4. Celebration
5. Archive	6. Other Closeout Items
7. Sign Off with Project Sponsor	

Hooray, you did it!

Can you say 'Yes' to these?

SESSION GOALS:

01

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

02

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

03

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

Project Management Toolkit

<https://epmo.sdcoe.net>

RESOURCES

Intro Project Charter Project Plan Status Meetings and Reports Execution and Launch Closure

Soft Skills **PM Toolkit** More

SDCOE has created an 82-page **Project Management Toolkit** based on Project Management Institute's tools and procedures. This toolkit is free to use and includes samples and templates that are designed to help you complete projects on time, in scope, and under budget.

The toolkit covers these subjects:

Project Management Phases | Project Charter | Roles and Responsibilities | Project Plan | Communications Plan | Kickoff Meeting | Folder Management | Execution Phase Activities | Status Report | Project Closeout Checklist | Lessons Learned Meeting | Survey | Final Report Presentation | Celebration | Organizational Change Management (OCM)



SDCOE Project Management Toolkit v5.0 [PDF]



Videos

Files





san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES™

THANKS!



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Project
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