

# HOW TO SERVE AS A PROJECT TEAM MEMBER



## Project Roles

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

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



## Kickoff Meeting

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

Attend the meeting and listen for the following:

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



## File Repository

The Project Manager or Project Lead should set up a location to store shared project files.

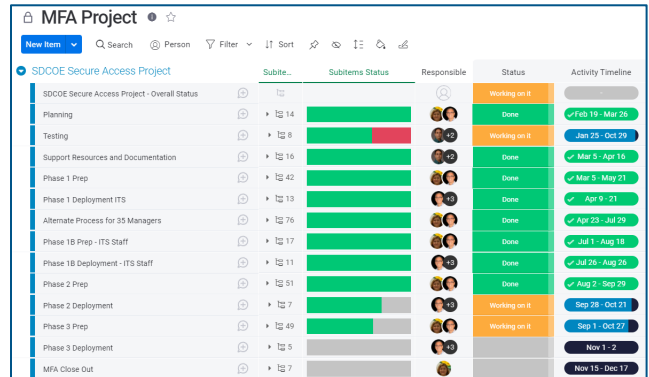
Examples: SharePoint, OneDrive, Google Drive

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



## Complete Tasks (Project Plan)

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



Item	Subitems Status	Responsible	Status	Activity Timeline
SDCOE Secure Access Project - Overall Status			Working on it	
Planning	100%		Done	Feb 19 - Mar 26
Testing	25%		Working on it	Jan 25 - Oct 29
Support Resources and Documentation	100%		Done	Mar 5 - Apr 16
Phase 1 Prep	100%		Done	Mar 5 - May 21
Phase 1 Deployment - ITS	100%		Done	Apr 9 - 21
Alternate Process for 35 Managers	100%		Done	Apr 23 - Jul 29
Phase 1B Prep - ITS Staff	100%		Done	Jul 1 - Aug 18
Phase 1B Deployment - ITS Staff	100%		Done	Jul 26 - Aug 26
Phase 2 Prep	100%		Done	Aug 2 - Sep 29
Phase 2 Deployment	75%		Working on it	Sep 28 - Oct 21
Phase 3 Prep	100%		Working on it	Sep 1 - Oct 27
Phase 3 Deployment	100%		Done	Nov 1 - 2
MFA Close Out	100%		Done	Nov 13 - Dec 17

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



## Engage with Project Manager

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

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



## Status Meetings

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

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



## Standup Meetings (if scheduled)

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

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



## Status Reports

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

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



## Go Live

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

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



## Lessons Learned Meeting

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

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



## Celebration

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

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



## SDCOE EPMO Website

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

- <https://epmo.sdcoe.net>