

MONITOR YOUR PROJECT PLAN

san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES™


And we're off!

We're in the **Execution Phase** and the project work has begun...

Here are some things that may happen during a project:

People still have their day-to-day work (on top of project work)	Snags	New needs
Maintaining the momentum, especially for a lengthy project	Keeping people in-the-know	Someone gets sick, goes on vacation, retires...

Q: Once the project team starts working on tasks, how will you keep the project moving forward?



Suggestions for monitoring your project plan:

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

If your project plan is stored in software...

SOFTWARE TIPS

1	Phase	Item	Owner(s)	Due Date	Status
2	1	Planning	Obtain from Tyler the Top 5 Requests and Top 5 Incidents	3/15/2021	Done
3	1	Planning	Test entry of the top requests and incidents	3/15/2021	Done
4	1	Planning	Meet with Tyler and John V. to talk about ServiceNow	3/15/2021	Done
5	1	Planning	Work with John V. to determine who will conduct the training meeting with Admin Assistants	3/15/2021	Done
6	1	Planning	Meet with Terry to review Project Charter	3/15/2021	Done
7	1	Planning	Meet with Tyler, Flora, Candace, John V. to introduce the project	3/15/2021	Done
8	2	Prep - Materials Creation	Contact feedback from 10 Admin Assistants	3/22/2021	Done
9	2	Prep - Materials Creation	Contact from within the Department of Incidents that SDCOE staff can discuss from (Work)	3/22/2021	Done
10	2	Prep - Materials Creation	Determine if the "I am having trouble with" search box can be a Content search instead of (P)	3/22/2021	Done
11	2	Prep - Materials Creation	Create job aids	4/1/2021	Done
12	2	Prep - Materials Creation	Create video	4/1/2021	Done
13	2	Prep - Materials Creation	Review and sign off on materials	4/1/2021	Done
14	2	Prep - Materials Creation	Post materials on Common Ground	4/1/2021	Done
15	2	Prep - Materials Creation	Create PPT that will be used as part of the short instructional video and ServiceNow Training	4/1/2021	Done
16	2	Prep - Materials Creation	Provide Suzanne with the recorded training meeting audio to post on Common Ground	4/20/2021	Done
17	3	Prep - Scheduling and Communications	Inform ITS Server Leadership of the project plan - via email and all ITIL Leadership Team via	3/22/2021	Done
18	3	Prep - Scheduling and Communications	Schedule and conduct Teams meeting with CSS to inform them of the effort	3/22/2021	Done
19	3	Prep - Scheduling and Communications	Set up spreadsheet to capture baseline metrics	3/22/2021	Done
20	3	Prep - Scheduling and Communications	Draft email to Executive Assistants, Admin Assistants, and Program Secretaries	3/24/2021	Done
21	3	Prep - Scheduling and Communications	Send spreadsheet of identified admin staff to training and review with Lisa	3/24/2021	Done
22	3	Prep - Scheduling and Communications	Determine date/time and schedule Teams dry run ANIG training meeting with Admin Assis	3/26/2021	Done
23	3	Prep - Scheduling and Communications	Meet with Tyler, Flora, and Candace to review progress/obtain next steps for project	3/26/2021	Done
24	3	Prep - Scheduling and Communications	Review draft email to assistants to introduce project and mention training meeting	3/26/2021	Done
25	3	Prep - Scheduling and Communications	Request from Lisa that all share New Hire Orientation that ITS can give the 2-minute video	3/30/2021	Done
26	3	Prep - Scheduling and Communications	Send formal invite from Peter's calendar for training meeting with assistants	3/30/2021	Done
27	3	Prep - Scheduling and Communications	Meet with Ruby on methods of communications	4/6/2021	Done

Excel/Sheets

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

Planning	Subitems	Subitems Status	Responsible	Status	Activity Timeline
Obtain from Tyler the Top 5 Requests and Top 5 Incidents	Done	Done	Mar 16, 2021		
Test entry of the top requests and incidents	Done	Done	Mar 16, 2021		
Meet with Tyler and John V. to talk about ServiceNow	Done	Done	Mar 16, 2021		
Work with John V. to determine who will conduct the training meeting with Admin Assistants	Done	Done	Mar 16, 2021		
Meet with Terry to review Project Charter	Done	Done	Mar 16, 2021		
Meet with Tyler, Flora, Candace, John V. to introduce the project	Done	Done	Mar 16, 2021		
Prep - Materials Creation	Done	Done	Mar 22 - Apr 20		
Prep - Scheduling and Communications	Done	Done	Mar 22 - Apr 19		
Execution - Education and Communications	Done	Done	Apr 14 - 30		
Closure	Done	Done	Apr 27 - Aug 3		

Project Management Software

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

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

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