

PROJECT DESIGN IT PROJECT METHODOLOGY, PERFORMANCE PHASES, INTEGRATION

Module 8

IT Project phases, its design, S.M.A.R.T methodology, project phases, project automation techniques, project integration approach, project success hints

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WHAT IS PROJECT DESIGN IN PROJECT MANAGEMENT?

Project design describes a project's key features, structure, criteria for success, and major deliverables to achieve the desired project goals.

Stakeholders can then choose the best design to use for the execution of the project.

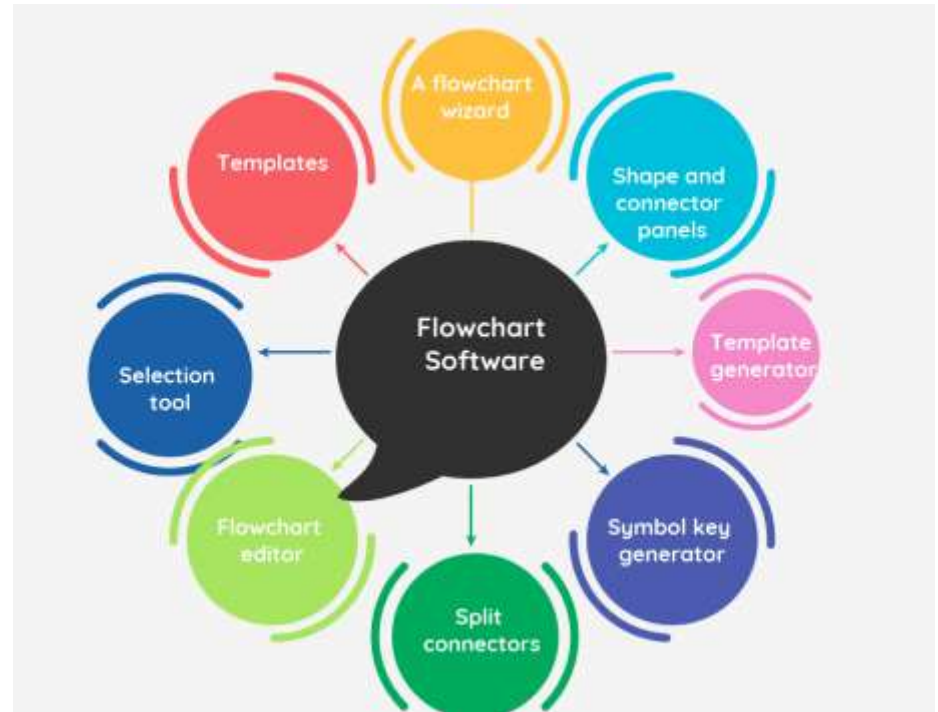
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<https://www.wrike.com/project-management-guide/faq/what-is-project-design-in-project-management/>

WHAT IS PROJECT DESIGN IN PROJECT MANAGEMENT?

The project design phase's outputs

- ❖ Sketches
- ❖ Flowcharts
- ❖ Site trees
- ❖ HTML screen designs
- ❖ Prototypes
- ❖ Photo impressions, and more.



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IT PROJECT CHALLENGES

IT Project management (ITPM) is larger, more complex, as such, more prone to failure.

- ❖ Interdependent integrations
- ❖ Rapid technology upgrades
- ❖ Version changes
- ❖ Multiple vendor choices

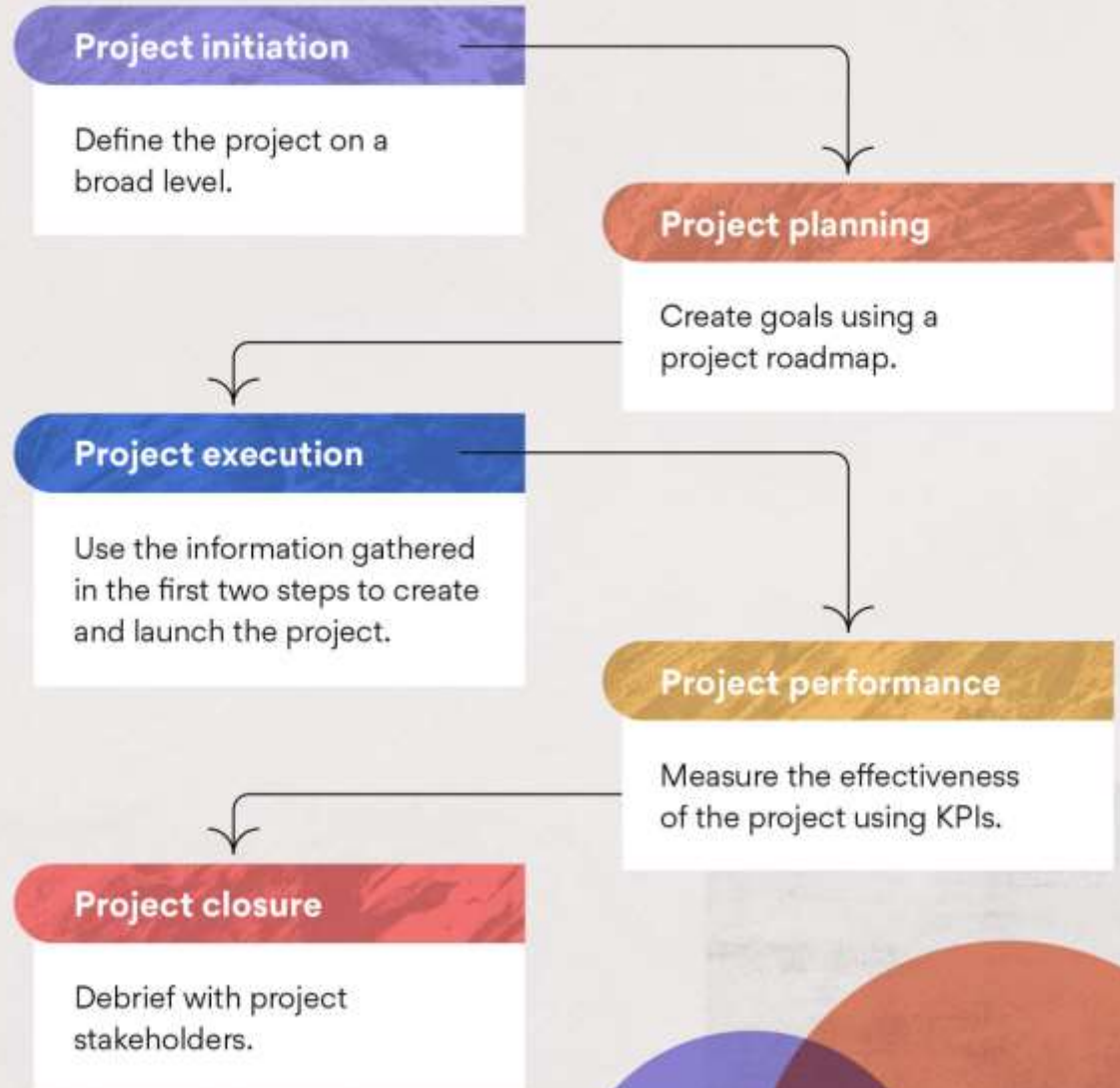


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THE IT PROJECT MANAGEMENT LIFECYCLE

The 5 phases of project management



<https://asana.com/resources/project-management-phases>

THE IT PROJECT MANAGEMENT LIFECYCLE



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<https://www.smartsheet.com/it-project-management>

THE IT PROJECT INITIALIZATION

- *Company Name: Apollo Enterprises*
- *Project Name: The OKR Playbook*
- *Project Manager: Kabir Madan*
- *Objective: The objective of this report is to increase lead generation by offering world-class resources to our customer base.*
- *Stakeholders: Daniela Vargas, Kat Mooney, Ray Brooks.*
- *Timeline: June 1 to July 20, 2021.*
- *Benefits: The benefits of this report include adapting a new competitive advantage, creating a new lead funnel, and ultimately resulting in a high ROI given the low project budget.*
- *Risks: While we see more benefits than risks, we could be pulling in unqualified leads that won't convert.*

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PHASE 2: PROJECT PLANNING

S.M.A.R.T./C.L.E.A.R GOALS

Specific – To set specific goals, answer the following questions: who, what, where, when, which, and why.

Measurable – Create criteria that you can use to measure the success of a goal.

Attainable – Identify the most important goals and what it will take to achieve them.

Realistic – You should be willing and able to work toward a particular goal.

Timely – Create a timeframe to achieve the goal.



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OVERVIEW

Smartsheet platform

Learn how the Smartsheet platform for dynamic work offers a robust set of capabilities to empower everyone to manage projects, automate workflows, and rapidly build solutions at scale.

CAPABILITIES



Team collaboration

Connect everyone on one collaborative platform.



Process management at scale

Deliver consistent projects and processes at scale.



Streamlined business apps

Build easy-to-navigate business apps in minutes.



Resource management

Find the best project team and forecast resourcing needs.



Workflow automation

Quickly automate repetitive tasks and processes.



Secure request management

Streamline requests, process ticketing, and more.



Governance & administration

Configure and manage global controls and settings.



Digital asset management

Manage and distribute assets, and see how they perform.



Content management

Organize, manage, and review content production.



Data connections

Synchronize data across critical business systems.



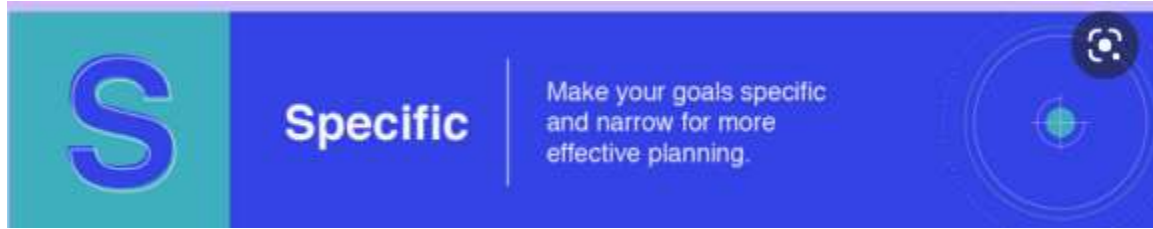
Intelligent workflows

Automate business processes across systems.

[See all capabilities >](#)

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SMART : S – SPECIFIC



It should include an answer to ‘w’ questions:

Who – Consider who needs to be involved to achieve the goal (this is especially important when you’re working on a group project).

What – Think about exactly what you are trying to accomplish and don’t be afraid to get very detailed.

When – You’ll have “time-bound” as a set a time frame.

Where – Setting location or relevant event, identify it here.

Which – Determine any related obstacles or requirements to “Learn how to bake in order to open a baking business.”

Why – What is the reason for the goal? (method for employees, company advancement or career development).

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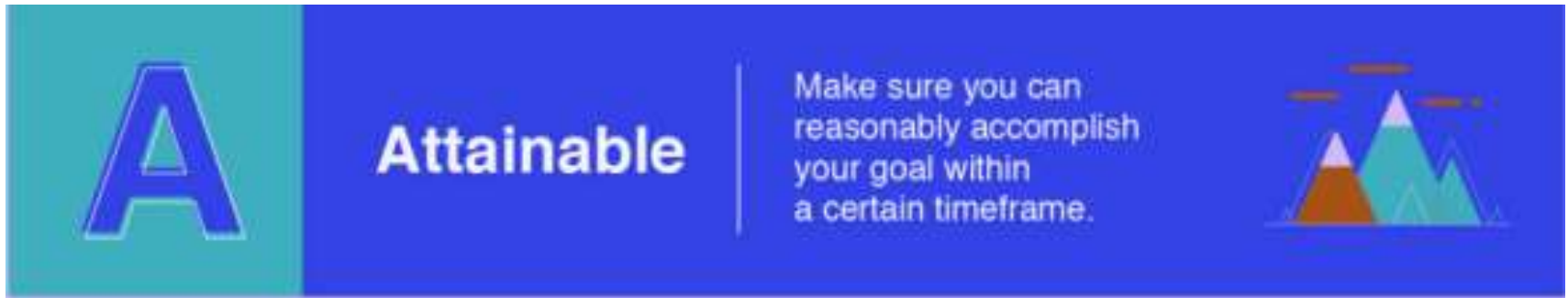
SMART : M – MEASURABLE



What metrics are you going to use to determine if you meet the goal? This makes a goal more tangible because it provides a way to measure progress. If it's a project that's going to take a few months to complete, then set some milestones by considering specific tasks to accomplish.

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SMART : A – ACHIEVABLE



This focuses on how important a goal is to you and what you can do to make it attainable and may require developing new skills and changing attitudes. The goal is meant to inspire motivation, not discouragement. Think about how to accomplish the goal and if you have the tools/skills needed. If you don't currently possess those tools/skills, consider what it would take to attain them.

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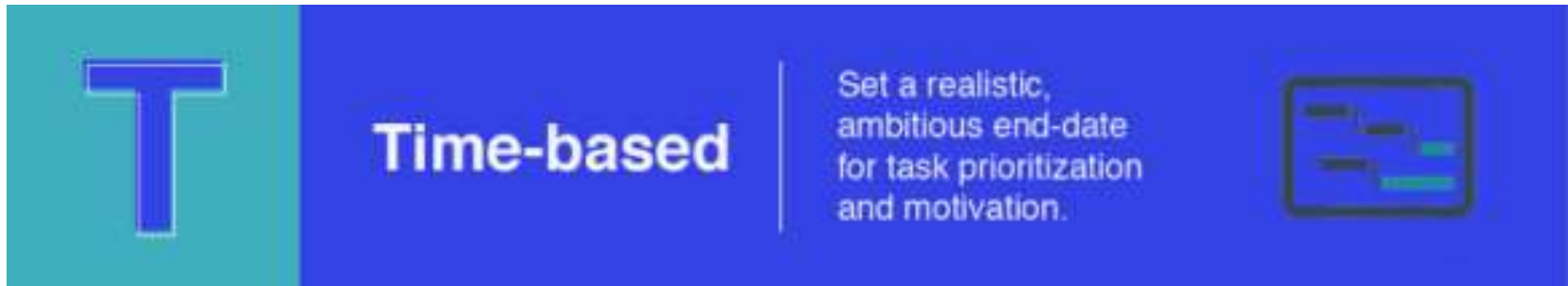
SMART : R – RELEVANT



Relevance refers focusing on something that makes sense with the broader business goals. For example, if the goal is to launch a new product, it should be something that's in alignment with the overall business objectives. Your team may be able to launch a new consumer product, but if your company is a B2B that is not expanding into the consumer market, then the goal wouldn't be relevant.

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SMART : T – TIME–BOUND



Anyone can set goals, but if it lacks realistic timing, chances are you're not going to succeed. Providing a target date for deliverables is imperative. Ask specific questions about the goal deadline and what can be accomplished within that time period. If the goal will take three months to complete, it's useful to define what should be achieved half-way through the process. Providing time constraints also creates a sense of urgency.

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C.L.E.A.R. GOALS

A newer method for setting goals as an appropriate today's fast-paced businesses, includes identifying the cost, quality, available resources, and a realistic timetable.

Collaborative – The goal should encourage employees to work together.

Limited – They should be limited in scope and time to keep it manageable.

Emotional – Goals should tap into the passion of employees and be something they can form an emotional connection to. This can optimize the quality of work.

Appreciable – Break larger goals into smaller tasks that can be quickly achieved.

Refinable – As new situations arise, be flexible and refine goals as needed.

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<https://www.wallstreetmojo.com/risk-categories/>

<https://project-management.com/types-of-risk-in-project-management/>

DOCUMENTS OF C.L.E.A.R. GOALS

Scope Statement – A document that defines the business need, benefits of the project, objectives, deliverables, and key milestones.

Work Breakdown Schedule (WBS) – a visual representation that breaks down the scope of the project into manageable sections for the team.

Milestones – Identify high-level goals that in the Gantt chart.

Gantt Chart – A visual timeline to plan out tasks and visualize the timeline.

Communication Plan – Develop the proper messaging with project all members based on deliverables and milestones.

Risk Management Plan – against unrealistic time and cost estimates, customer review cycle, budget cuts, changing requirements, and lack of committed resources.

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PHASE 3: PROJECT EXECUTION

- A “kick-off” meeting
- Develop team
- Assign resources
- Execute plans
- Procurement management if needed
- Set up tracking systems
- Task assignments
- Status meetings
- Update project schedule
- Modify project plans



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PHASE 4: PROJECT PERFORMANCE/MONITORING



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KEY PERFORMANCE INDICATORS INFOGRAPHIC

Functional Areas

Accounting

- % Billing accuracy
- \$ Cost of goods sold
- % Client cash net revenue
- % Invoices under query
- # Days in accounts receivable

Compliance and Risk

- \$ Loss expectancy
- % Operational risk
- # Corporate governance index
- # Frequency of inventory audit
- # Turnaround time for audits

Customer Service

- # Speed of answer
- # Complaints received
- # Call handling time
- % Complaints resolved
- % Call abandon rate

Finance

- # Berry ratio
- % Capital acquisition ratio
- % Basic earning power ratio
- # Labor multiplier
- % Return on funds employed

HSSE

- # Lost time injury frequency rate
- \$ Energy consumption cost
- # Hours of OHS training conducted
- # Operational spills
- # Lost workdays due to accidents

Terminology

KPI

Definition:
A measurable expression for the achievement of a desired level of results in an area relevant to the entity's activity.

SMART Objectives


SMART Objective


- Objective → Increase customers base
- +KPI → % Market share
- +Target → 20%
- +Timeframe → By Financial Year End
- +Responsible → Sales Director

Increase customers base to reach 20% market share by FY end under Sales Director leadership

KPI naming standards
KPIs – start with symbols

Value of \$ Net profit 

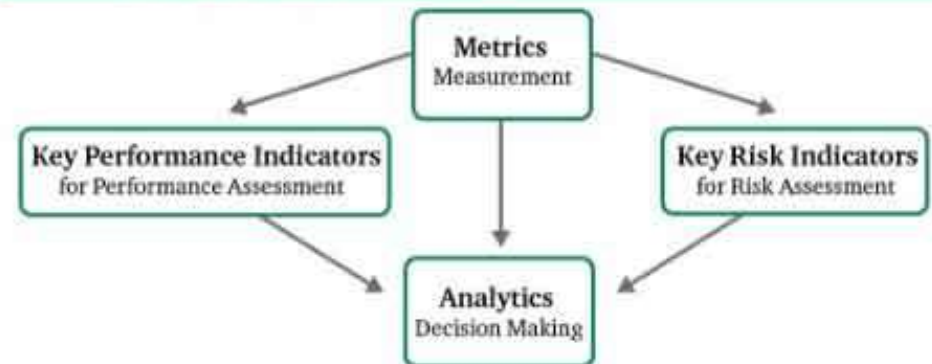
Number of # Defects 

Percentage of % Budget variance 

Value added by KPIs

-  **Clarity**
Paint a clear picture of strategy
-  **Focus**
Focus on what matters / requires attention
-  **Improvement**
Monitor progress towards the desired state

Metrics - KPIs - KRIs - Analytics



<https://www.wallstreetmojo.com/risk-categories/>

<https://www.businessstudynotes.com/finance/project-management/key-performance-indicators-for-monitoring-your-projects/>

PHASE 4: PROJECT PERFORMANCE/MONITORING

Example

Investment (ROI)
cost

- *Project Objective: Grow lead acquisition by 15% MoM*

- *Actual Cost: \$6,487 in billable hours.*

- *Earned Value: \$47,300 in MoM acquisition growth*

- *Return on Investment: \$40,813*

- *Schedule Performance Index (earned value divided by planned value): .88*

- *Customer Acquisition Cost (cost divided by number of leads): \$.61 per lead*

- *MoM Lead Acquisition: 18% improvement*

- *MoM Site Traffic: 4% improvement*

- *Net Profit Margin: 8% improvement*

Performance
index (CPI)

Planned value
(PV)

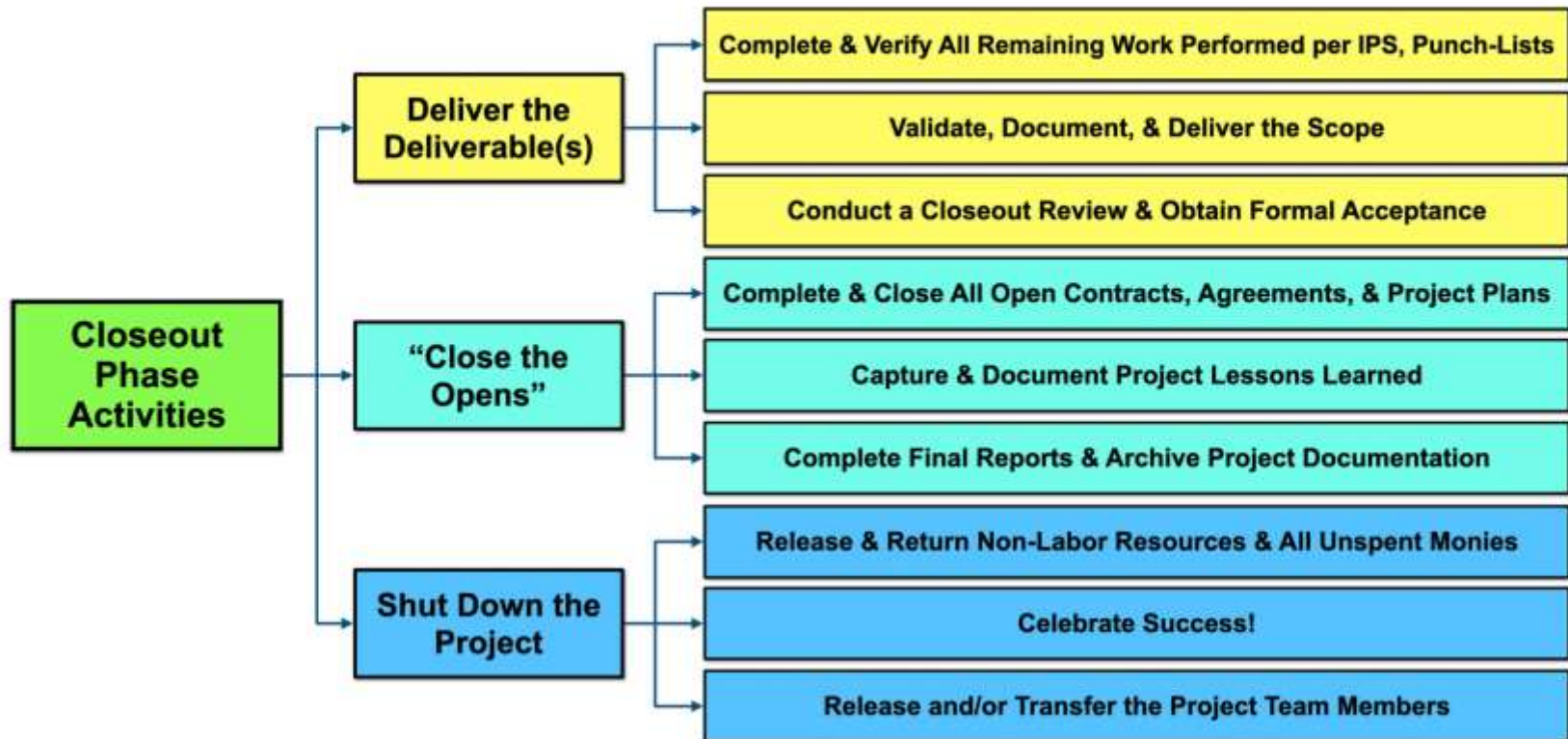
Actual cost (AC)
earned value (EV)

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<https://asana.com/resources/project-management-phases>

PHASE 5: PROJECT CLOSURE

The 9 Primary Elements of Closing a Project



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<https://www.theprojectmanagementblueprint.com/blog/how-to-close-a-project>

Example

PHASE 5: PROJECT CLOSURE

Project Name: The OKR Playbook

Date: August 20, 2021

Time: 10:00 to 11:00am CST

Agenda Details:

- **Quick recap of the project (10:00am):** Kabir will go over the initial goals and objectives of the project and recap deliverables.
- **Recap of the outcome (10:15am):** Kabir will review the project performance, focusing on our initial lead generation goal and additional key KPIs.
- **Stakeholder input (10:30am):** Kabir, Daniela, Kat, and Ray to share their input on what went well and what could have gone better.
- **Action items:** Kabir to send out meeting notes by EOD 8/20 and schedule optimizations to be completed by 9/3.

Please come to the post mortem prepared with input on ways we can improve performance going forward.

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Example

SMART goal: I want to complete a project

- **Description:** Improving the customer experience on mobile devices is a core initiative for my company this year, so we are going to create a mobile app. By the end of the fiscal year, there should be 50,000 installs of the mobile app we develop, and it should produce a 5% conversion rate. We'll build the mobile app in-house and launch it by the end of Q2 with an app-related marketing campaign that will continue to the end of the year.
- **Milestone:** Mobile app launches end of Q2.
- **Deadline:** End of the fiscal year.

SMART goal: I want to improve my performance

- **Description:** To grow in my career, I need to improve my PowerPoint skills. By taking online classes and reviewing tutorials, I'll improve my PowerPoint skills so that it only requires 25% of my work time.
- **Milestone:** Complete an online PowerPoint course in three months.
- **Deadline:** Next employee review in six months.

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Example S.M.A.R.T GOAL WORKSHEET IN WORD DOC

S.M.A.R.T. GOALS WORKSHEET



Crafting S.M.A.R.T. Goals are designed to help you identify if what you want to achieve is realistic and determine a deadline. When writing S.M.A.R.T. Goals use concise language, but include relevant information. These are designed to help you succeed, so be positive when answering the questions.

INITIAL GOAL	Write the goal you have in mind
S	What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?
SPECIFIC	
M	How can you measure progress and know if you've successfully met your goal?
MEASURABLE	

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<https://www.smartsheet.com/blog/essential-guide-writing-smart-goals>

S.M.A.R.T GOAL WORKSHEET IN WORD DOC

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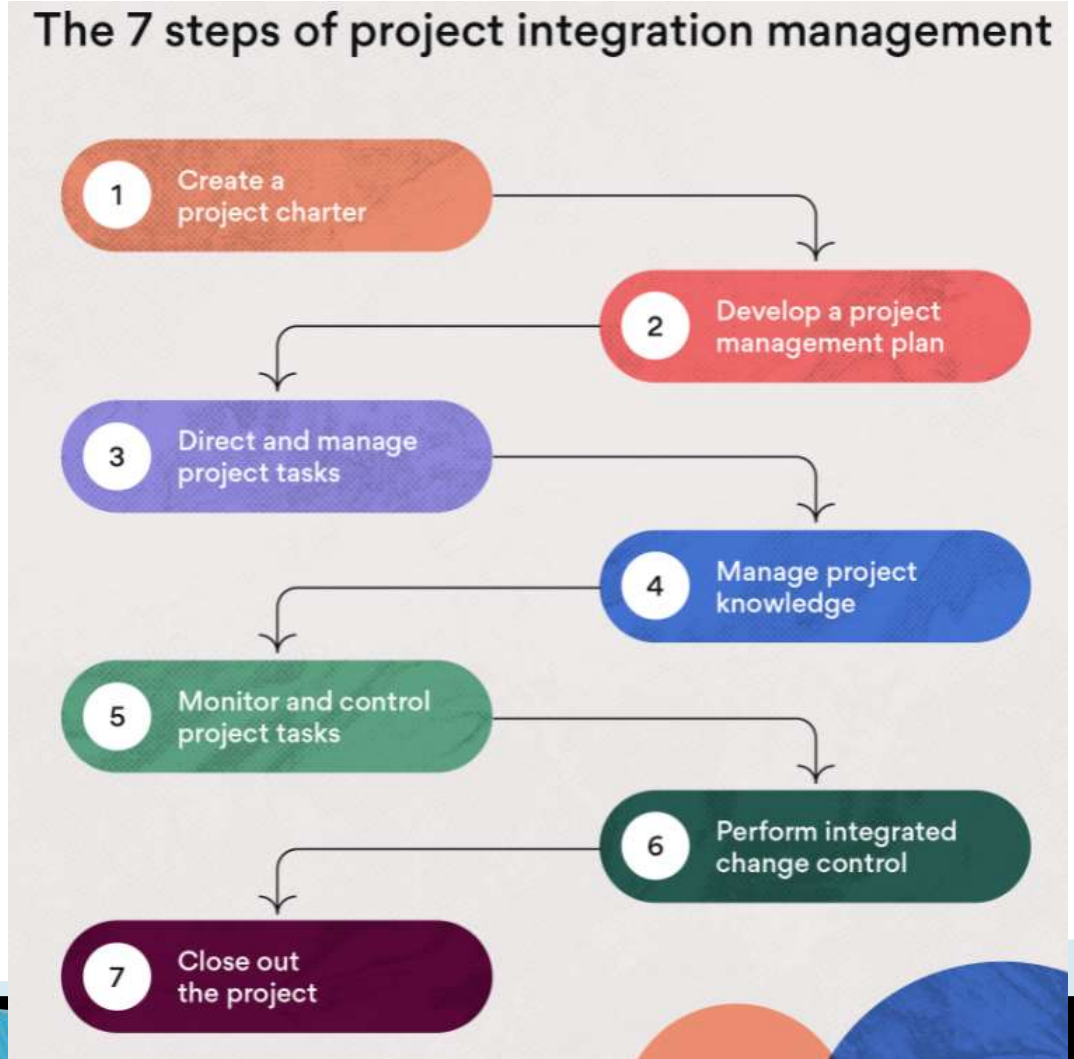
A	Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?
ACHIEVABLE	
R	Why am I setting this goal now? Is it aligned with overall objectives?
RELEVANT	
T	What's the deadline and is it realistic?
TIME-BOUND	
SMART GOAL	Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed

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<https://www.smartsheet.com/blog/essential-guide-writing-smart-goals>

PROJECT INTEGRATION MANAGEMENT

Project closure involves
a final stakeholder meeting
a formal review of the
project
Closing the contract
Organizing and archiving
project materials
Project closure



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<https://asana.com/resources/project-integration-management>

<https://www.theprojectmanagementblueprint.com/blog/how-to-close-a-project>

PROJECT INTEGRATION MANAGEMENT

Process	Phase	Outputs
Develop project charter	Initiation	Project charter
Create a project scope and plan	Planning	Project management plan
Direct and manage project work	Execution	Project deliverables
Monitor project tasks	Monitoring and control	Change requests and status updates
Close out the project	Closure	Final product

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<https://asana.com/resources/project-integration-management>

<https://asana.com/resources/project-management-skills>

SKILLS FOR PROJECT MANAGEMENT

7 Hard skills

1. Scoping a project
2. Project roadmapping
3. Drafting a project brief
4. Project kickoff meeting
5. Project planning
6. Creating a project timeline
7. Task management

10 Soft skills

1. Collaboration
2. Communication
3. Teamwork
4. Problem solving
5. Organization
6. Time management
7. Leadership skills
8. Adaptability
9. Conflict resolution
10. Critical thinking

8 key technical skills

1. Gantt charts
2. Kanban boards
3. Agile management
4. Cost management
5. Change management
6. Project management software
7. Workload management

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TYPES OF IT PROJECT

Example of IT projects, when we use S.M.A.R.T method

Product launch

Hardware upgrades

Software upgrades (migrating to a new operating system, including creating desktop images, for example)

Network upgrades

Database merge

Transition to cloud storage

Deploying virtual networks

Website development and launch

Changes and upgrades to infrastructure (removing outdated servers, for example)

System development projects (business intelligence and analytics projects, for example)

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ON MORE RESOURCES FOR IT PROJECT MANAGEMENT TRAINING

The best guidance and practice methods

- ❖ Project Management Institute (PMI)
- ❖ International Project Management Association (IPMA)
- ❖ American Society for Advanced Project Management (ASAPM)
- ❖ International Association of Project
- ❖ Program Management (IAPPM)

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THANK YOU

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