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National Institutes of Health (NIH)  
Project Management Center of Excellence (PMCoE)

**“PROJECT PLANNING AND REPORTING”**

09 April 2013

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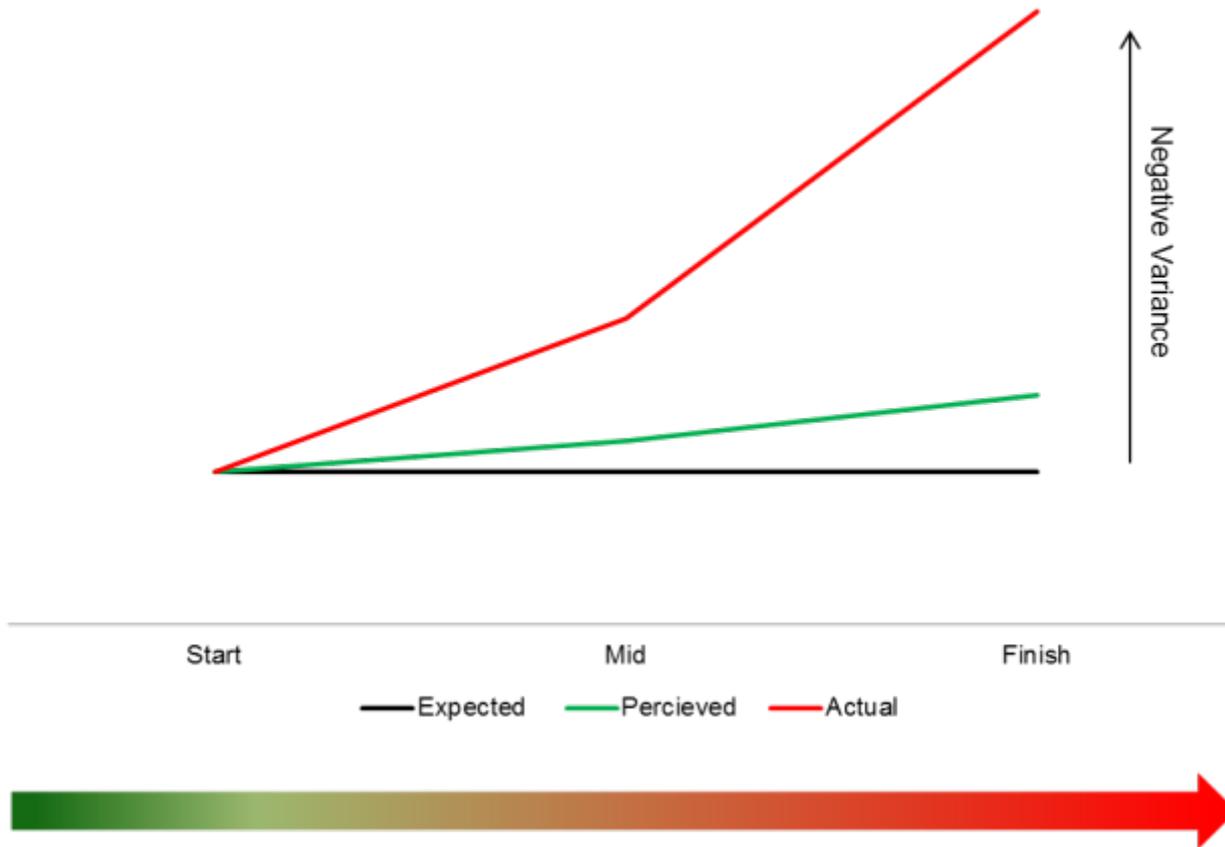
## Presenters

- Presenters
  - Rahul Suthar
  - Kenneth Bergman, PMP
  - Brittany Miller
  
- Relevant Experience
  - Program Management Office for HHS Grants.Gov
  - Project Management Office for National Institute of Allergy and Infectious Disease (NIAID)
  - Project Management Office for National Institute General Medical Sciences (NIGMS)

## Common Scenario

- Stakeholder contacts a Project Manager directly about a IT service need
- Project Manager decides to “Fast Track” and promises a delivery date without full understanding of scope
- Development staff starts building without requirements and stops work on other tasks they were working on
- Test resources not available to test
- Product delivered not fully meeting Stakeholder needs
- Stakeholder dissatisfied with delivery and complains to CIO
- CIO was unaware project was being conducted
- CIO wants to know why the his/her highest priorities are not being worked on

## Typical Information Technology (IT) Project Variance



## Where Do The Issues Lie?

- Projects are “Fast Tracked”
  - Majority of System Development Life Cycle (SDLC) is waived
- A schedule, of any type, is not in place
  - Delivery date defined but nothing else
  - No tasks, milestones, or resource estimates
- No concrete definition of when the project is “Finished”
  - Scope is loosely defined
- Inter-project dependencies are not defined
  - Security scope not considered
  - Coordination with technical infrastructure groups not conducted
- General lack of communication

## What Are the Consequences?

- Project scope quickly begins to creep
  - Project Team, Project Managers, Stakeholders, and Senior Staff not on the same page
- PM's have trouble determining if the project is on schedule
  - Projects are managed ad hoc with no short or long term planning
  - ***Over promising and under delivering***
- Project's go on infinitely
  - Without defined and managed scope, Stakeholder changes constantly occur and projects never close
- Organizations over allocate their resources
  - Project team members allocated full time on numerous projects
- The highest priority projects, as defined by Chief Information Officer (CIO), are not receiving the most attention

## Challenges

- Numerous project requests
- Limited resources
- Demanding clients wanting quick turn around
- Working within the Enterprise Performance Lifecycle (EPLC)
- Incorporating and understanding quickly evolving security standards

## Building the Foundations

- Define tailored Enterprise Performance Lifecycle (EPLC) specific for each organization
  - Tailored schedule and artifacts for Traditional, Non-Traditional (“Fast Track”) and Maintenance projects
  - Conduct Stage Gate Reviews
- Structured Initiation\Pre-Select Phase Analysis
  - Should this idea become a project?
  - What is the basic scope of this project (Define done)?
  - Are the resources available to staff this project?
- All Projects, no matter size, should have a plan
  - Define and baseline a schedule
  - Define milestones within the schedule
- Maintain Organizational Master Schedule
  - What are we working on?
  - Who is doing what?
  - Identification of inter project dependencies
- Perform Project Pipeline Planning
  - What will we be working on in the future?
  - When will resources be available to work on those projects?

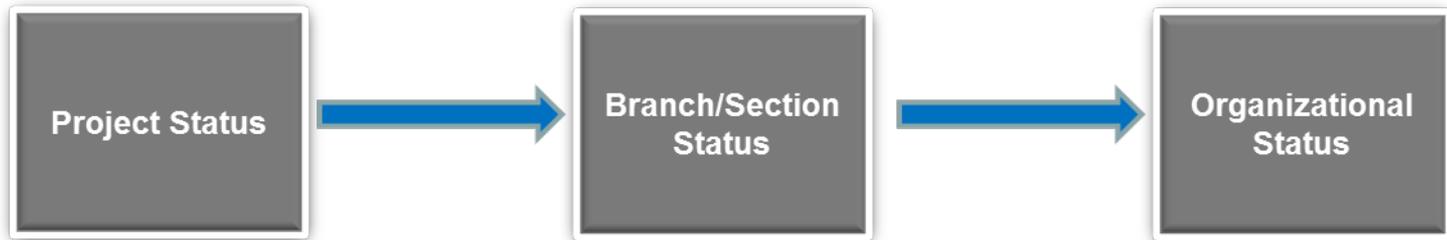
## Key Facts About Project Reporting

- Processes need to be in place
  - Tailored EPLC implemented
  - Executive buy-in to the management processes in place
  - PM's are trained and knowledgeable
- Requires truly integrated teams:
  - Project Manager
  - Systems Development
  - Hardware/Infrastructure
  - Security
  - Requirements
  - Testing
- Requires active and engaged Project Managers
- Schedules are key
  - Without a good plan, there is nothing to measure against
- Projects need defined milestones
  - Milestones provide short term goals and provide check points to measure progress

## Levels of Project Reporting

- CIO/IT Director
  - Project Portfolio Status
  - Resource Availability and Allocation
  - IT Project Pipeline Planning
  
- Section /Branch Chief
  - Project Portfolio Status
  - Resource Availability and Allocation
  - IT Project Pipeline Planning
  
- Project Manager
  - Project status
  - Cost, Scope and Schedule

## Reporting Begins at the Project Level



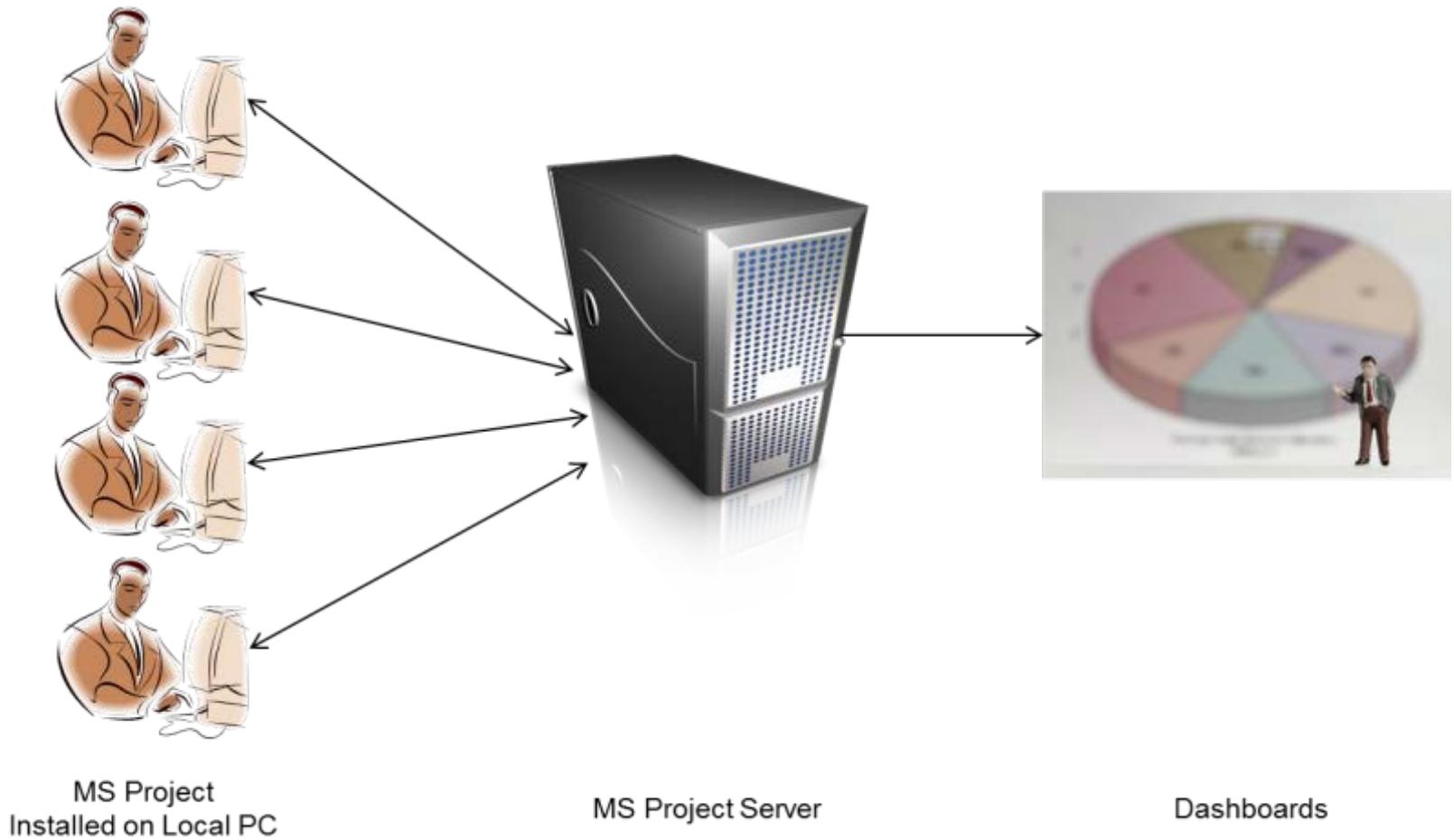
## Weekly Status Meetings

- Project Level
  - Where are we at? (Schedule review)
  - What is the next major **EVENT**?
  - Is the project meeting its pre-defined **MILESTONES**?
  - What **ACTIVITIES** did we accomplish last reporting period, this reporting period, and have planned for next week
  - What are our current **RISKS, ISSUES, and MITIGATION** activities
- Branch/Section Level
  - Are projects on schedule?
  - Where are resources allocated?
  - What is in the pipeline?
- CIO Level
  - Portfolio status
  - Organization project priority

## Tools Make it Easier

- Microsoft Project
  - Defines Project tasks, durations, milestones and required resources
- Microsoft Project Server
  - Organizational Master Schedule
  - Enterprise Resource Management
  - Risk and Issue Mitigation
  - Process Workflows
- Dashboards\Data Visualization Tools
  - Provide quick views of overall status
  - Show trends
  - Provide basis for future decision making

## How Does Data Flow?



## Overall Benefits

- Empowers the Project Managers
- Provides the data across the organization for sound decision making
- Provides the basic input for overall portfolio performance and status
- Provide a decision making basis for project pipeline planning
- Facilitates the project management process
- Facilitates project progress – keeps projects moving forward
- Ensuring high priority projects have the necessary resources assigned to allow for on schedule completion



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THANK YOU.