"Everything's a Project"

An Overview of the Advancement Efforts for Organizational Change, Project and Program Management for the State of Delaware

Bryant Baker and Cindy Bray – DTI Program Management Office

Everything's a Project

- **Two Program initiatives underway:**
  - Establishment of a branch of the Project Management Institute
  - Delivery of OCM/PM Courses to State Government
- **Program Management:**
  - Project Management *plus*
  - Organizational Change Management

Some Things Are Programs

- What initiatives qualify as programs?
  - To avoid duplication of effort (quality), or
  - To avoid gaps in delivery (quality) –
  - Two or more projects need to be closely coordinated
- When "conformance to specifications" may not be enough
  - Program includes OCM process when Quality is considered a reflection of customer experiences

Almost Everything is a Project

- A couple of applicable Quality tenets (Project Management in Quality):

  - Juran Trilogy – Quality Planning, Quality Control, Quality Improvement

  - Many Programs/Projects are intended to Deliver Quality Improvement, regardless of the Deliverable.

    Note: *many* projects are intended to reduce the risk of *degraded* quality

- Per DTI, Every Project is strongly recommended to have (Quality in Project Management):

  - A Quality Management Plan, defining…

  - Quality Assurance and Quality Control for the duration of the project

Everything's a Project

- Project Management Body of Knowledge (PMBOK) definition:

  "A project is a temporary endeavor undertaken to create a unique product, service, or result."

- A Quality Practitioner's View:

  "A project is a uniquely sequenced combination of processes producing a continuous improvement deliverable."

- Which one is correct?

Bodies of Knowledge

- DTI Project Management Processes
  - Based upon the PMBOK and the Standard for Program Management
  - Tailored to the State's systems, Delaware Code
- PMBOK Ownership
  - Like ASQ's ownership of their BOKs…
  - Project Management Institute owns this one
- What good does a BOK do us? A Standard?

BOKs and Standards

- A Standard is a common solution to a repetitive problem.[1]
  - De Facto – widely adopted, accepted as best practice
  - Consortia – developed by businesses
  - Regulatory – required by law
  - Volunteer Consensus – what PMI does
- Standards –
  - Consistency, Common terminology
  - Centralize processes leading to continuous improvement

[1]*PMBOK 4th Ed. FAQ from pmi.org*

PMI

- Project Management Institute Mission
  - Advance Project Management Worldwide
  - Organizations Embrace PM
  - Organizations then attribute at least part of their success to PM
- PMI Organization
  - Global Operations Center in Newtown Square
  - Chapters, Worldwide
  - Largest single-profession society in the world, with over 265,000 members

PMI

Chapters are:

- Geographically determined
- GOC affiliation – not strong, but not loose
- Oriented to serve members according to culture, industry, laws local to the region
- Membership services include educational, certification, networking opportunities

PMI's Local Chapter

- Delaware Valley Chapter
  - ○ Serves Allentown to southern DE-MD border
  - ○ Southern Jersey to Lancaster
  - ○ Membership: 2800
- DVC may be too big!
  - ○ Concerns over QOS to the entire membership
  - ○ Large culture and industry diversity
  - ○ Reduced leadership opportunities
  - ○ Meetings cumbersome – size and distance

Delmarva Branch

- Solution
  - DVC not unique with this problem
  - GOC has begun to approve "Chapter with Branches" models
  - Enough interest = Branch Creation
- Ergo, the Delmarva Branch
  - DTI and DVC sponsored
  - DSU Partnership
  - 1500+ PMI members live on the Delmarva Peninsula

Delmarva PMI Branch

■ Delmarva Branch serves:

Government	Alternative Energy
Aerospace	Banking
Tourism	Health Care
Agriculture	IT

■ The Unique Proposition:

Leverage millions of man-hours of knowledge towards ensuring ROI for continuous improvement deliverables on Delmarva

Delmarva PMI Branch

- To this end, the Branch brings value to its stakeholders:
  - Members gain knowledge to apply, and maintain their certifications
  - Member sponsors (e.g., State Government) see process improvement as this knowledge is applied – a solid business case
- Branch services entire Delmarva Peninsula
  - Baltimore, DC, Southern MD and Hampton Roads Chapter members will also be included
  - Targets include poultry industry, NASA, education, and State Government agencies

So what?

- DQP and DTI have the same customers…

- …and PMI-DVC Delmarva Branch and Delaware State Government have many of the same customers.

- Common Cause: Continuous Quality Improvement

- Executing Program Management processes are one of the most efficient tools to this end

How can State Agencies leverage the millions of hours of accumulated knowledge that currently exists on the execution of continuous improvement?

PMO Education

One answer: OCM/PM Education

- Continuous Education component offered by the Delmarva Branch, *plus*

- Accredited Course Sequence, developed by Cindy Bray and Dr. Charles Poplos, offered through OMB

- Idea is to provide State Agencies with another tool ensuring positive ROI

- Three Courses – Basic, Intermediate, Advanced

PMO Education

- Each course graduates to addressing an increasing level of risk and complexity in programs and projects

- PM based upon PMBOK and tailored for the State

- OCM processes have been developed at DTI, and are nationally recognized, cutting-edge methodologies now available exclusively for State Agencies to utilize

Basic PMO Course

- PM:
  - PM Defined
  - Tailoring
  - Project Initiation, Planning, Execution, Control/Monitoring, and Closing

Basic PMO Course

- OCM:

  ○ Organizational Change Management Defined

  ○ Integration into PM

  ○ Organizational Readiness Assessment and Tailoring

Intermediate PMO Course

- PM:

  - Scope Management Planning

  - Time Management Planning

  - Resource Management Planning

  - Procurement Management Planning

  - Cost Management Planning

  - Risk Management Planning

  - Quality Management Planning

  - Plan Integration

Intermediate PMO Course

- OCM:
  - Communication Planning
  - Readiness Methodology
  - Lessons Learned

Advanced PMO Course

- **PM:**
  - Why Projects Fail
  - Project Metrics
  - Project Monitoring In-Depth
  - Mentoring
  - Advanced Topics in Project Management Research

Advanced PMO Course

- OCM:
  - Transition and Knowledge Transfers
  - Managing Resistance
  - OCM Metrics
  - Negotiation

Baldrige as Guide

1. Leadership
2. Strategic Planning
3. Customer Focus
4. Measurement, Analysis and Knowledge Management
5. Workforce Focus
6. Process Management
7. Results

1.1 Senior Leadership

How do leaders lead?

- **Basic Course**
  - PM – Organizational Change Management Defined (so organizations working with DTI understand our mission when approaching projects)
- **Advanced Course**
  - Sponsor Assessment
  - Sponsor Roadmap
  - Mentoring
  - Advanced Topics

1.2 Governance and Societal Responsibilities

How do you govern and fulfill your social responsibilities?

- The PMO courses offered to other organizations in the state

- Intermediate Course
  - Charter and Scope document
  - MOU
  - Roles and Responsibilities
  - Sponsor Roadmap

2.1 Strategy Development

How do you develop your strategy?

- Basic Course

  - Tailoring processes for Project Management and Organizational Change Management

  - The Organizational Change Management Organizational Readiness Assessment

2.1 Strategy Development, cont

How do you develop your strategy?

- Intermediate Course
  - Project Planning
    - Scope Management Plan
    - Time Management Plan
    - Resource Management Plan
    - Procurement Management Plan
    - Cost Management Plan
    - Risk Management Plan
    - Quality Management Plan

2.1 Strategy Development, cont.

- Intermediate Course – PM Example
  - Quality Management Plan
    - Quality Control – the Verification Matrix
      - Verification to Business Requirements, Specs
      - Verification to the Scope of Work
      - Methods of Verification (Demonstration, Analysis, Test, Inspection) specified per requirement/scope
      - Phase of the Verification – unit, integration, system, customer acceptance
    - Quality Assurance – auditing
      - Did we execute the processes we said we were going to?
      - What can be improved?
      - Blind to the project team

2.1 Strategy Development, cont

How do you develop your strategy?

- Intermediate Course
  - Organizational Change Management Planning
    - End-user Communication Plan
    - Sponsor Roadmap
    - Readiness Methodology
    - Training Strategy
    - Coaching
    - Resistance Management Plan

2.2 Strategy Deployment

How do you deploy your strategy?

- Intermediate Course
  - Organizational Change Management and PM plan integration

Process Integration

Project Management   **Change Management**

Project Initiation

Project Planning

Project Executing

Project Controlling

Project Closing

Reinforcing   Changes

Preparing for Change

Managing Change-Planning

Managing Change-Execute

Closing/Monitoring Change

3.1 Customer Engagement

How do you engage customers to serve their needs and build relationships?

- Intermediate Course
  - Stakeholder Analysis
  - Organizational Readiness Assessment and Tailoring
  - Organizational Change Management Readiness Methodology
  - End-user Communication Plan
  - Training
  - Coaching

Stakeholder Analysis

Important / Little Influence	Important / Influential
II	I
IV	III
Not Important / Little Influential	Not Important / Influential

Assessing the Organization

Risk Determination Table

Organizational Traits (vertical axis): 22, 44, 110

Change Traits (horizontal axis): 12, 24, 60

- Medium-High Risk
- High Risk
- Low Risk
- Medium-Low Risk

34
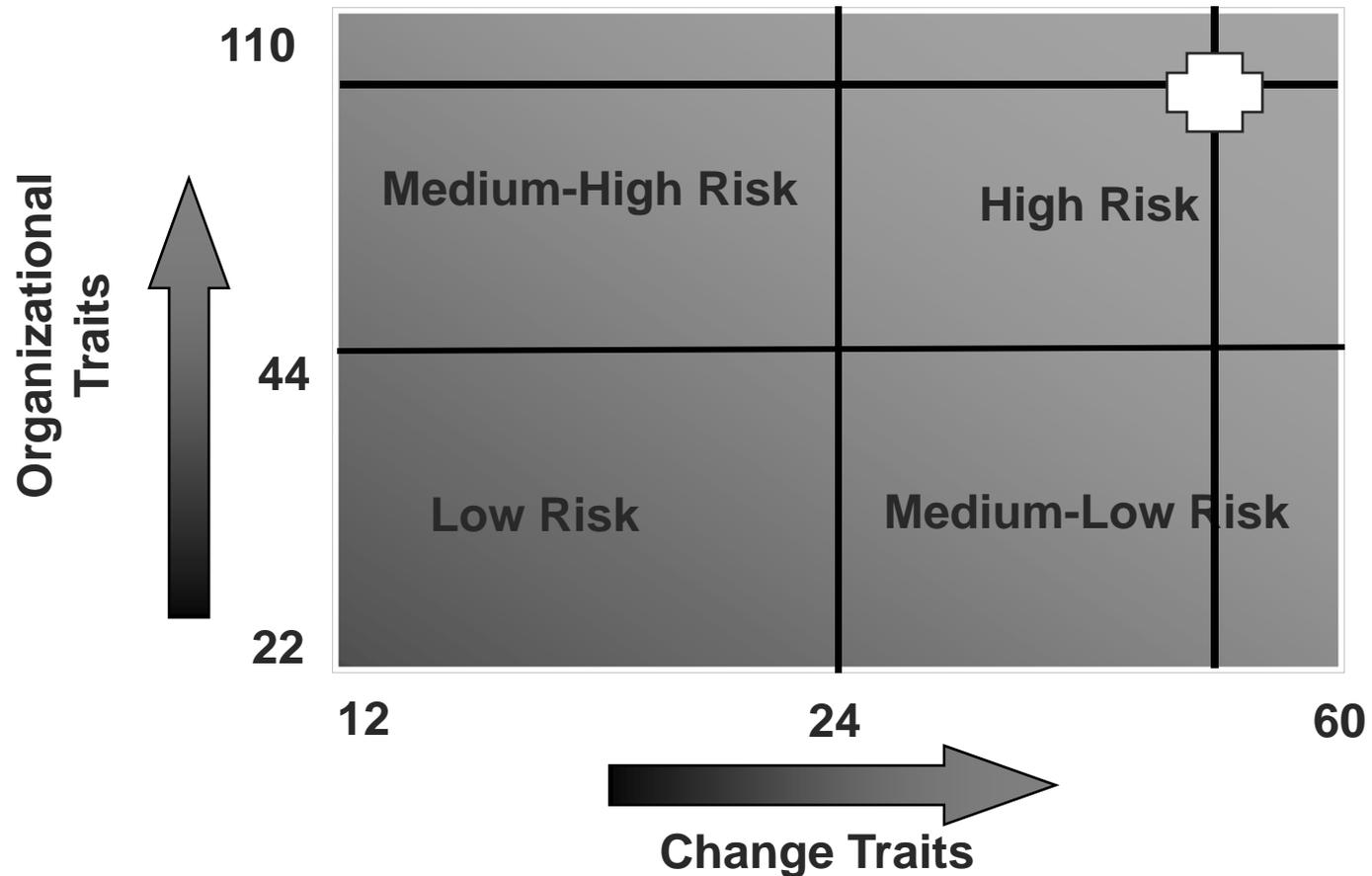
Organizational Change Phases and Communication

How do I stay motivated?

Transition through Analysis

Celebrate Success!

Understanding through Awareness

What is happening?

Comfort

Insight

Unaware Denial

Ability with coaching

How do I prepare?

Anxiety

Desire through impacts

What's in it for me?

Knowledge by training

What will I do differently tomorrow?

Who Should Deliver the Message?

56% of the messages should come from the CEO and the direct supervisor

Pie chart:
- **CEO/President 25%**
- **Change Mgmt Team Leader 6%**
- **Change Mgmt Team Member 7%**
- **Employee's Supervisor 31%**
- **Department Head 9%**
- **Senior Mgmt 11%**
- **Executive Manager 11%**

Who Should Deliver the Message?

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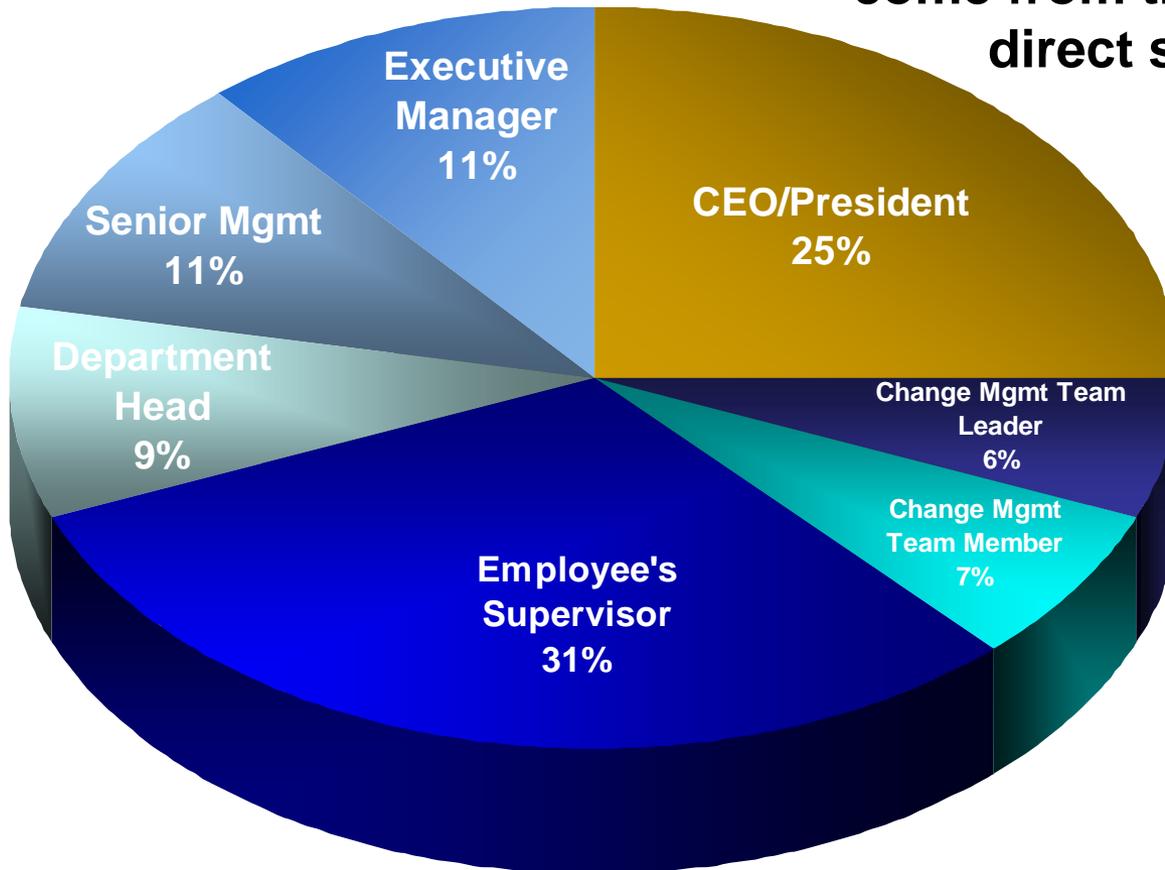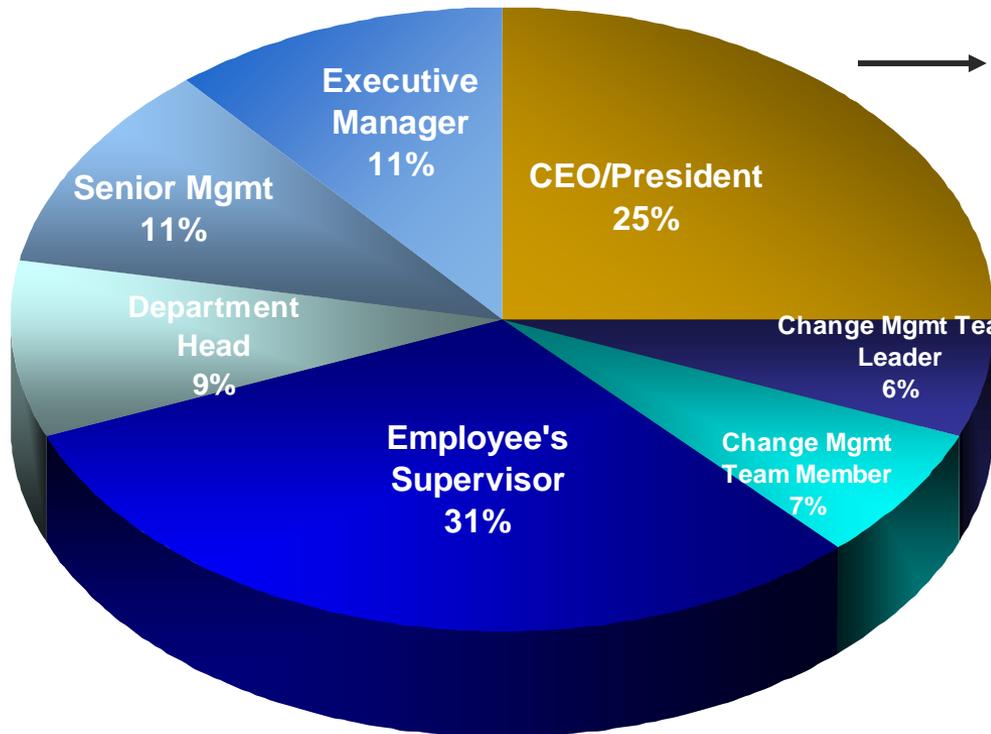
2005 Prosci® Best Practices in Change Management

- The current situation and rationale for the change
- Business issues or drivers that created the need for the change
- Competitive issues or changes in the market-place
- What might happen if the change is not made
- Vision of the organization after the change is made
- Overall timeframe
- Alignment of the change with business strategy

Who Should Deliver the Message?
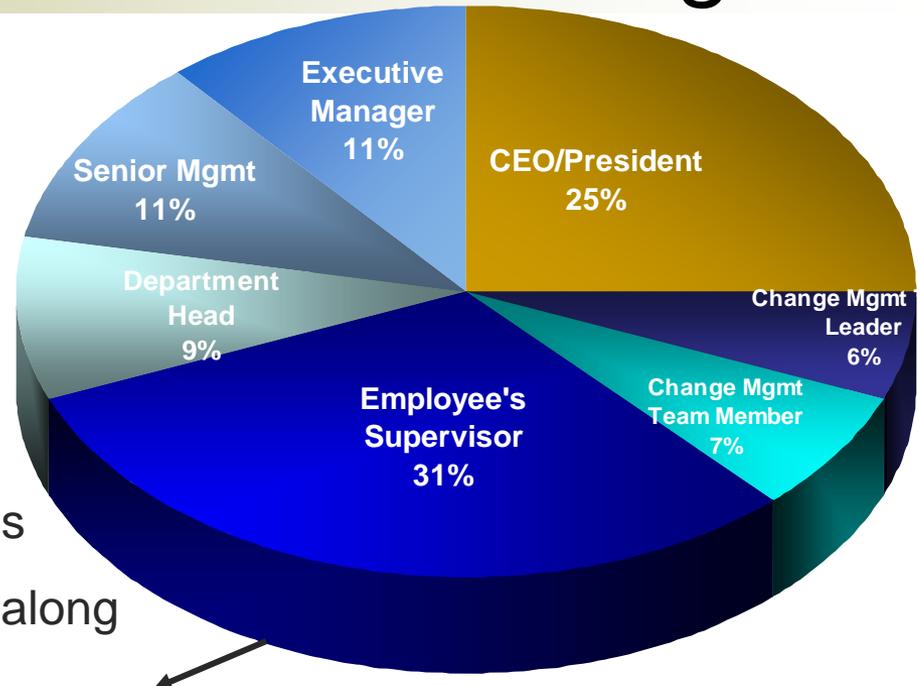
- The impact on daily activities

- Why employees want to go along

- Job security

- Specific ways they are expected to aid the change

- Resources for assistance and ways to provide feedback

2005 Prosci® Best Practices in Change Management

Communication Plan

Specific Event	Apr	May	June	July	Audience	Communicator	Release Authority	Status	Comments
Training Evaluation Report	X								
Sponsor Memo – Coaching (Email)		X			End-users	Change Management Specialist	Change Management Team Leader		
Coaching **FACT Sheet** (coaching Information, email attachment with Sponsor Memo email)		X			End-users	Change Management Specialist	Change Management Team Leader	In Progress	
Coaching Sponsor Memo and FACT sheet **Website Update**		X			End-users	Change Management Specialist	Change Management Team Leader		
Lessons Learned **Document**				X	Sponsors	Change Management Specialist	Change Management Specialist		

<u>Communication Plan includes:</u>

- Event
- Scheduled Date
- Audience

- Communicator
- Release Authority
- Status
- Comments

Communication Tracking Spreadsheet

Communication Title	Communication Media	Date Sent	Sent From	Organization/Team	Phone #	email address	Sent to:	Organization	Phone #	email address	Follow-up needed		Type of Follow up		
											Yes	No	Meeting	email	Other

- Communication Title
- Media
- Date Sent
- Sent from and to
  - Organization/Team
  - Phone
  - Email Address

- Follow-up Needed
  - Yes
  - No
- Type of Follow-up Needed
  - Meeting
  - Phone call
  - Email
  - Other
- Comments

End-user Inventory

1ˢᵗ
End-user Identification and Demographic Information

2nd
Skills Inventory

3rd
IT sppt.

DTI Readiness Methodology

All Project

I N P U T

Functional Impacts

Functional Impacts Documentation

Master Readiness Tracking Spreadsheet

Readiness Checklist

End Users

Successful System Implementation

Functional Impacts

Current Process	Process Changes Overall Business Impact	New Roles: The Task that a Person Does is Different	The Way the Task Gets Done is Different	Timelines: When the Task Must Be Done has Changed	Integration: With whom the Person Interacts has Changed	New Info Available (online or report)	New Technology Required	Description of Impact - New process	Include in Training Materials	Communicate Business Process Change	Address Security Impacts - Forms, Access, Authorization	Communication to end-users	Use Readiness Methodology to have tasks completed	Date Due	Date Completed	

Master Readiness Tracking Spreadsheet

	Target Due Date	Org 1	Org 2	Org 3	Org 4	Org 5	Org 6	Org 7	Org 8	Org 9	Org 10	Org 11	Org 12	Org 13	Org 14	Org 15	Org 16	Org 17	Org 18	Org 19	Org 20	Org 21	Org 22	Org 23	Org 24		24
Send in user names and userIDs	07/19/06		✔	✔	✔	X	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	✔	X	X	✔	✔	✔	✔	X	X	18	
		User ID Task for New Castle County 75% complete																									
Register for Training	07/31/06		✔	✔	✔	▲	✔	✔	✔	✔	✔	✔	✔	▲	✔	✔	✔	▲	▲	✔	✔	▲	✔	▲	▲	16	
		Training Registration for New Castle County 66% Complete																									
Had at least one person attend training	08/18/06		✔	X	✔	X	✔	✔	✔	✔	✔	✔	✔	X	✔	✔	✔	X	X	✔	✔	X	✔	X	X	15	
		Had individuals attend training 63%																									
How many attended training			4	X	1	X	2	1	1	1	2	5	2	X	5	2	2	X	X	2	1	X	2	X	X		
																											44

Readiness Checklists

September 2006

DTI Team: _____

	Activity	Target Due Date	Check When Done
1	Using the attached spreadsheet, verify systems/applications used by your team, the data steward, how data on that system is classfied, which DTI teams use it, the assigned data classification, and the Disaster recovery category that has been assigned to it.	Sept 30, 2006	
2	Using the attached spreadsheet Identify all individuals on your team who handle data that is confidential, secret, or top secret	Sept 30, 2006	
3.	On the spreadsheet indicate if these individuals have the ability to secure these documents	Sept 30, 2006	
4.	If individuals do not have the ability to secure these documents, please indicate if you would like the security office to work with them to address this concern.	Sept 30, 2006	
	Email Completed Checklist to cindy.bray@state.de.us	Sept 30, 2006	

Executive Sponsor Reporting

Major Project Status Overview – S A M P L E

PHRST ERP Project Implementations Status Overview

PHRST Upgrade	Risk	Comments
On time		
Under Budget		
• eBenefits		
• Recruitment		
• eRecruitment		
Readiness		
Training		

Time & Labor	Risk	Comments
On-time		
Under Budget		
Training		
Readiness		

Risk Color Key	
On Target – no risk	(green)
In Progress – may complete late	(yellow)
At Risk – needs attention	(red)

Readiness Status Report – S A M P L E

Activity/Task & Categories	Target Start Date	Target Due Date	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name	Org. Name
Monthly Checklists																
September	9/1/03	9/30/03	X	X	X	X	X	X	X	X	X	X	X	X	X	X
October	10/1/03	10/31/03	X	X	X	X	X	X	X	X	X	X	X	X	X	X
November	11/1/03	11/30/03	X				X			X						X	
Other Critical Tasks																
Leave Survey	8/1/03	9/31/03	X	▲	X	X	▲	X	X	X	X	▲	X	X	▲	X
Recruitment Survey	9/1/03	10/31/03		▲					▲		▲		▲			

X — Organization has completed as required

▲ (yellow) — Organization is in process of completing task but will not finish by due date. No risk to readiness

▲ (red) — Organization has not started this task and is jeopardizing readiness for this target. No risk to readiness.

3.1 Customer Engagement

> How do you engage customers to serve their needs and build relationships?

- Advanced Course
  - Resistance Assessment
  - Resistance Management Plan
  - Mentoring

3.2 Voice of the Customer

How do you obtain and use information from your customers?

- Intermediate Course
  - Lessons Learned
  - Feedback emails set up for each project
  - Organizational Readiness Assessment Surveys
  - Coaching plan (manager/supervisor outreach)
- Advanced Course
  - Negotiation

4.1 Measurement, Analysis, and Knowledge Management

How do you measure, analyze, and then improve organization performance?

- Intermediate Course
  - Organizational Change Management Metrics
  - PM Metrics
  - Project Monitoring

Organizational Change Management Enterprise Metrics

- Organizational Change Management adherence to Best Practices
- On-time Readiness task completion
- Customer satisfaction
- Number of projects the team is on. The percentage of these projects completed on-time/under-budget.
- How effective the team is overall.
- The percentage of our tools that are used. Which tools are used most often, which tools are used the least.
- Communication efforts. What type of feedback have we received? What are the most common questions we are asked? What type of communication is used most often, etc.
- What is the most common category of problem encountered upon implementation?
- Web trends
- Training Metrics

Individual or Specific Project Metrics

- How effective is each Organizational Change Management specialist.

- Communication efforts. What type of feedback have we received? What are the most common questions we are asked? What type of communication is used most often, etc.

Sponsor Metrics

- Number of projects with sponsors
- Average sponsor power rankings
- Sponsor Commitment index
- Sponsor Coalition index
- Sponsor Communication index
- Sponsor as Manager index

Training Metrics

- Organizational Change Management is involved in developing the training strategy, and oversight of the training effort.

- All training that is provided by the project will be evaluated.

- Additionally, the Organizational Change Management team will track
    - Number of attendees
    - Time or day of training preferences
    - Training venue preferences
    - Instructor preferences

Coaching Metrics

- Manager/supervisor efforts to explaining the project to subordinates.

- Manager/supervisor support for the project.

- Manager/supervisor to aid staff in preparing for the project and completion of readiness efforts.

- Manager/supervisor efforts to collect feedback from staff.

- Manager/supervisor support of the project through re-prioritization of work efforts.

Customer Satisfaction Surveys

- Understanding-Awareness Survey
- Impact-Desires Survey
- Training Survey
- Coaching Survey
- Post Implementation Survey
- Evaluation Survey

Resistance Metrics

- Awareness Resistance

- Org Restructuring Resistance

- Status Quo Resistance

Project Management Metrics

- Baselining your Schedule

- Earned Value Management - Given My Burn Rate *(variances)*, Will We…
  - Run out of time?
  - Run out of money?
  - Both?!?!

- Application of Key Value Areas, aka Value-Based Metrics

4.2 Management of Information, Knowledge, and Information Technology

How do you manage your information, organizational knowledge, and information technology?

- Advanced Course
  - Transition
  - Transition planning
  - Knowledge transfer and coaching between project team and production
  - Lessons Learned

Knowledge Transfer Plan

Required Skills by Team Role

Skill areas =========> Knowledge Role V	PeopleSoft Process Knowledge	PeopleSoft Configuration	Design & Build Reports, Interfaces, Conversions, Extensions	Site Operations	General Project	Change Management
		PeopleSoft Financials Related Skills			**General Project Related Skills**	
Functional	High	Low	Low	Low	High	Low
Configuration	Medium	High	Medium	Medium	Medium	Low
Technical	Medium	Medium	High	High	Medium	Low
Change Management	NA	NA	NA	NA	Medium	High

Definitions		
High =	No supervision required and can lead	
Medium =	Requires some supervision	
Low =	Requires routine and direct supervision	

Business Process – Documentation, evaluation, design and build of business processes (State and PeopleSoft processes) within assigned areas of responsibility	**High**	Able to explain business processes Able to explain and defend rationale for business process decisions Able to documents current processes, analyze potential process changes and design future processes
	Medium	Able to explain business processes Able to assist documentation and design of future processes with supervision
	Low	Aware of business processes, able to explain overview
Configuration – Configuration of the PeopleSoft application	**High**	Significant experience with one or more PeopleSoft modules and able to lead and teach others to configure PeopleSoft
	Medium	Able to configure PeopleSoft to support maintenance and future implementations
	Low	Sufficient understanding to evaluate future enhancements, create functional specifications with supervision
Reports, Interfaces, Conversions, Extensions – Identification of functional and technical requirements and specification, build/program, and implementation of reports, interfaces, conversions and extensions. (some or all)	**High**	Able to define/design functional requirements and/or specification for reports interfaces, conversions and extensions Able to create Technical Specifications
	Medium	Able to support and troubleshoot technical problems in their area (Reports, Interfaces, Conversions or Enhancements) Requires some direction and supervision to define/design functional requirements and/or specification for these activities Requires some direction and supervision to support and troubleshoot technical problems in their area
	Low	Requires continuous supervision to define/design functional requirements and/or specification for these activities Requires continuous supervision to support and troubleshoot technical problems in their area
Site Operations – Routine activities and management	**High**	Can execute PeopleSoft batch scheduling, error handling, security administration, configuration/workbench transports Can respond to helpdesk for phone support, PeopleSoft printers, and GUI installation, upgrade and support Can manage all 3rd party tool administration

Knowledge Transfer – Action Plan

Section 2 – Action Plan by Role

Provide all planned activities that will help develop the desired level of competency set by the goals above. Use the appropriate tables below and delete unnecessary tables. Additional rows should be added to the tables as needed.

Functional:

Training Course, Activity, Demonstration Opportunity	Instructor / Coach	Target Date	Comment / Demonstration Results

5.1 Workforce Engagement

How do you engage your workforce to achieve organizational and personal success?

- PMO education
- Advanced Course
  - Lessons Learned Process
  - Mentoring

5.2 Workforce Environment

How do you build an effective and supportive workforce environment?

- PMO education
- Advanced Course
  - Lessons Learned Process
  - Mentoring
  - Why do projects fail?

6.1 Work Systems

How do you design your work systems?

- Basic Course
  - Organizational Change Management and PM integration
- Advanced Course
  - Advanced topics in PM Research
  - Panel discussion

6.2 Work Processes

How do you design, manage, and improve your key organizational work processes?

- Basic Course
  - Overview of DTI's PMO processes
- Intermediate Course
  - In depth coverage of DTI's PMO processes
  - Hands on activities using our templates and tools
- Advanced Course
  - Lessons Learned Process

Questions?