Project Management for Librarians

Ensuring Successful Projects and Programs

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Manager, Data Operations and Metadata Management

Manulife – Asia Data Office

Learning Targets

- How project management works
- How can we use PM knowledge in our work
- PM tools and techniques

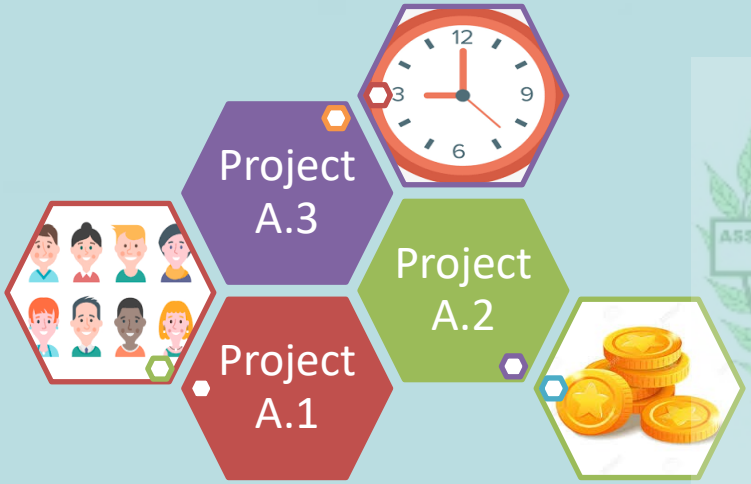
PROJECT MANAGEMENT 101

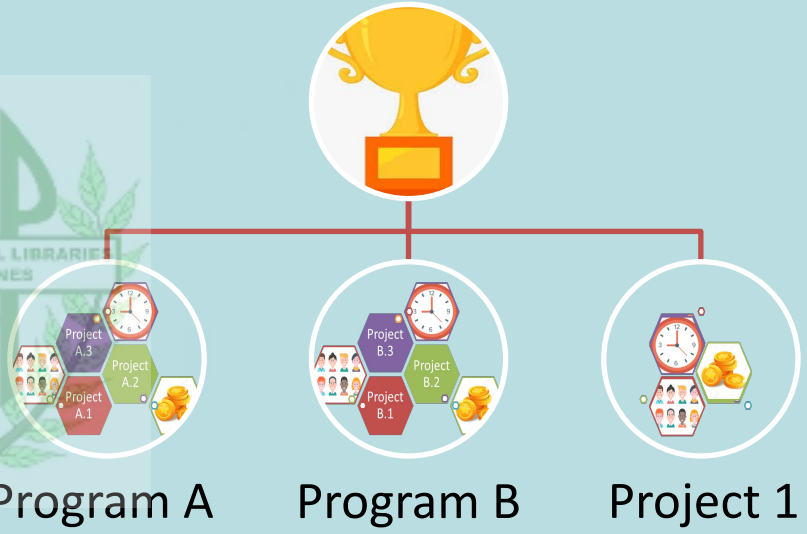
A project is…

- An activity with a start and end date
- Scale may be small, medium or large
- May be a product, service or target result

- ❑ Expanding product/service
- ❑ For efficiency/effectiveness
- ❑ Customer feedback/needs
- ❑ Legal/compliance requirement
- ❑ Social requirement
- ❑ Organizational change
- ❑ Technology upgrade
- ❑ Company targets/goals
- ❑ Mini-projects (wants)

Programs vs Portfolio





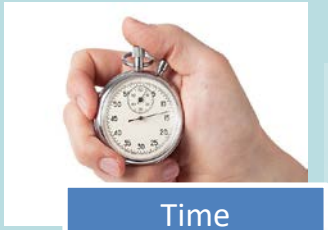
Projects vs Operations

- Initiate
- Plan
- Lead
- Organize
- Control
- Close

- Plan
- Organize
- Lead
- Control

PM Knowledge Areas

Scope

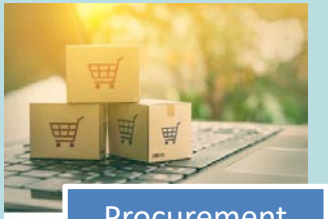


Time

Cost

Quality

Human Resource



Procurement

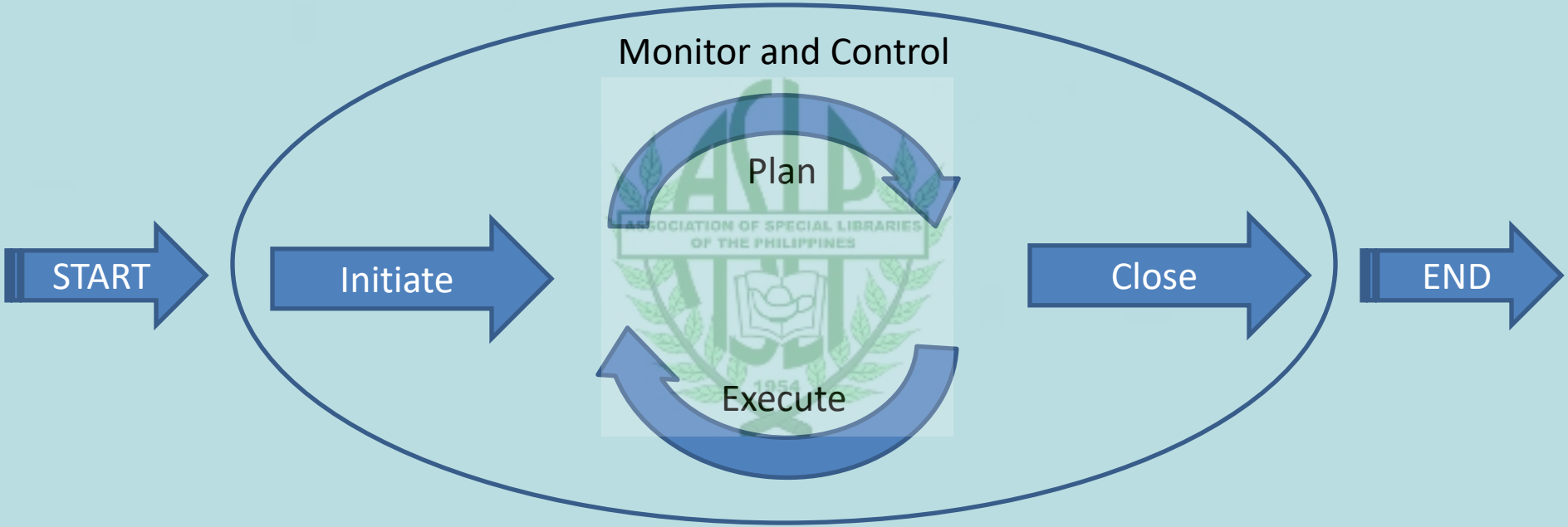
Communication

Stakeholder

Risk

Integration

Process Groups



APPLYING PM CONCEPTS

The Business Case

- Project name and description
- Executive summary
- Problem / opportunity
- Root cause analysis
- Alternative solution/s
- Comparison of alternatives
- Evaluation and recommendation
- Implementation approach

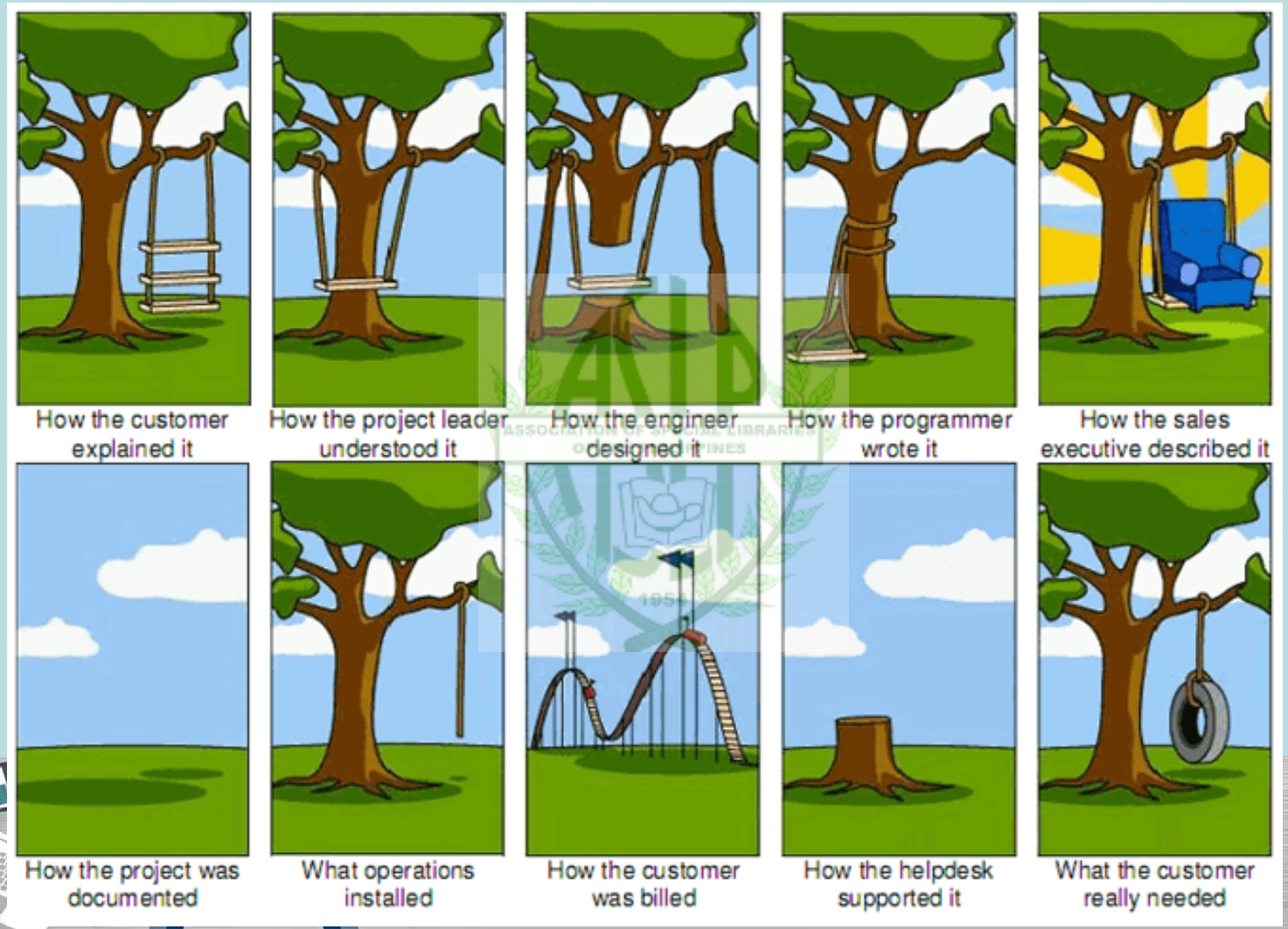
Projects solve “pain points”

The Project Charter

- Project name and description
- Business case
- Goals, objectives and success criteria
- Project output description
- Milestone schedule
- Summary budget
- Customer/stakeholder requirements
- Project deliverables
- High-level scope
- Resource requirements
- Risks, constraints and assumptions
- PM assignment, authority level and responsibilities
- Approval requirements
- Sponsor or authorized person for the project

Before executing a project…

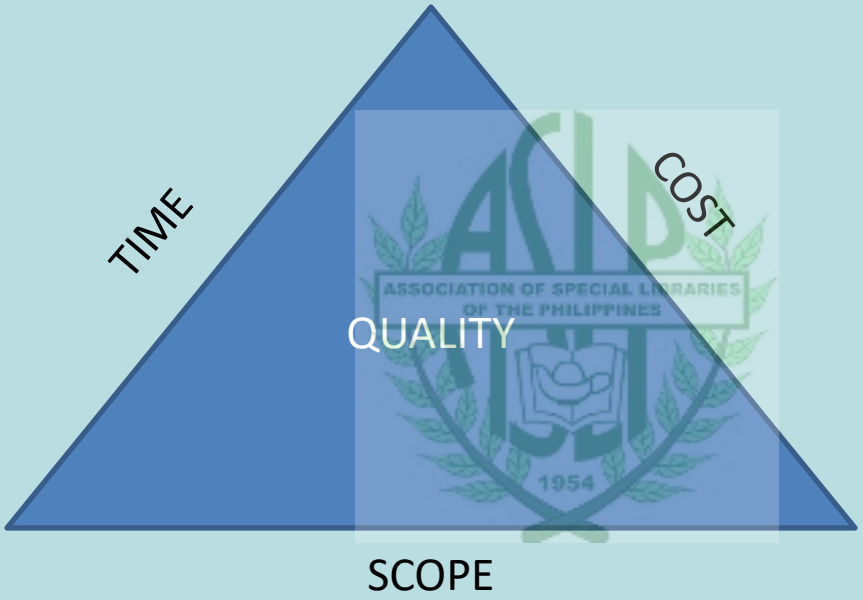
1. Prepare and ensure that the project charter is completed and signed off.
2. Plan out the project scope and identify every **work package** needed.
   - **Work Breakdown Structure (WBS)**
   - **Project Management is also a work package**
3. Gather requirements carefully and thoroughly.


How the customer explained it
How the project leader understood it
How the engineer designed it
How the programmer wrote it
How the sales executive described it
How the project was documented
What operations installed
How the customer was billed
How the helpdesk supported it
What the customer really needed

Before executing a project…

4. Identify assumptions and constraints.
5. Define and organize the project scope.
6. Plan out how to execute your WBS.
7. Define your output vis-à-vis schedule and budget.
   - Identify the project's **critical path.**
8. Define your "quality" product metrics.

The Triangle of (a project's) Life



At least one constraint should remain flexible

Before executing a project…

9. Identify the skills (and people) you need.
   - Plot out your **RACI.**
10. Define the project's communication plan.
   - Who, when, how, how often, whom
11. Identify the other resources you still need.
   - "Make or buy"
12. Identify and plan how you will manage risks.

During execution…

1. You need a strong and competent leader as your PM to direct and manage.
2. Your team should be competent, resilient and have mutual respect for each other.
3. Communication is key for a successful project.

During execution…

4. Control points for milestones is needed.
   - Project CP and Management CP
5. Validate your scope and avoid **scope creep**.
6. Control **schedule, cost, quality and risks.**
7. Manage dependencies and expectations.

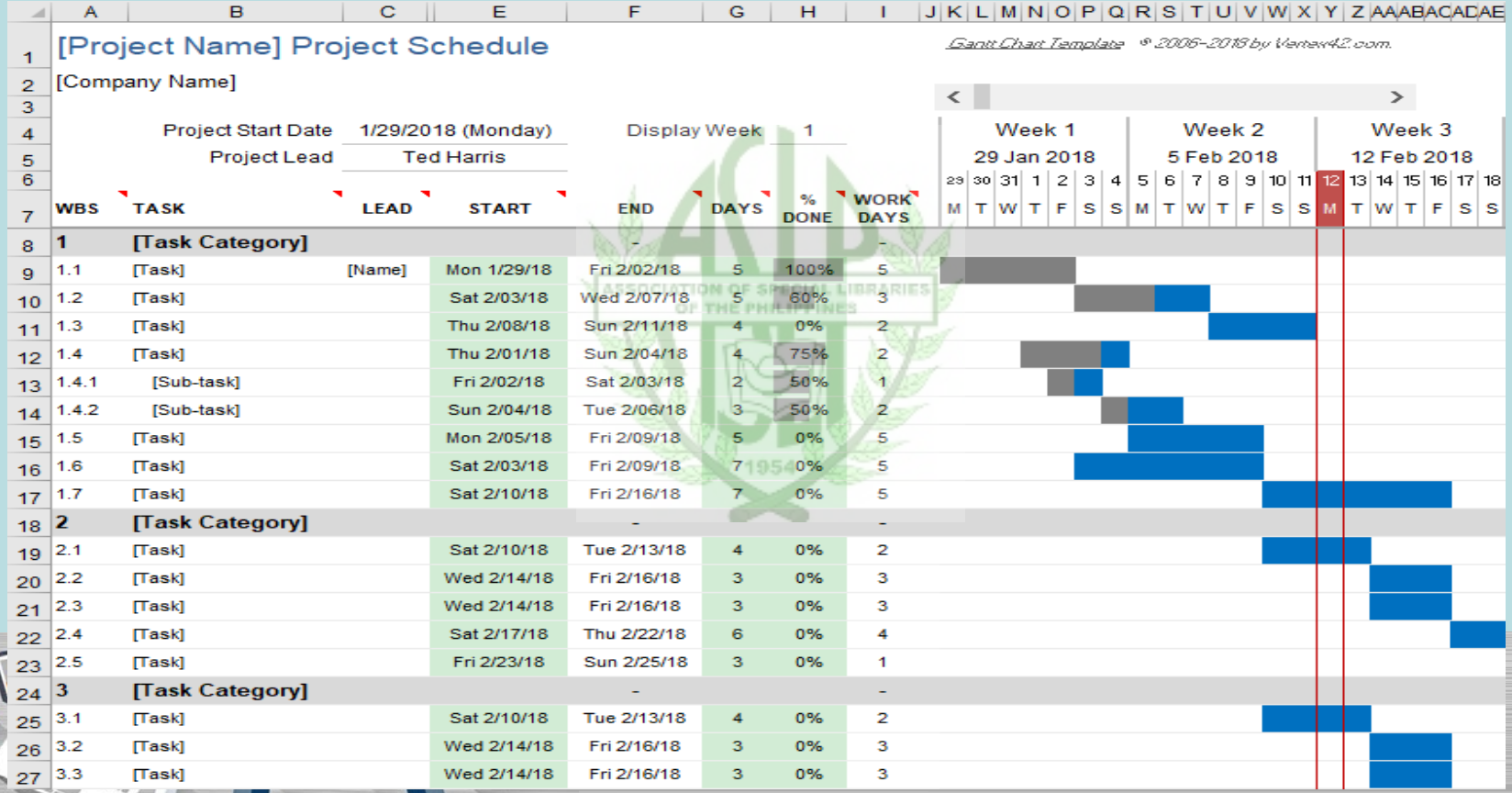
Monitoring and Controlling Projects

PM TOOLS AND TECHNIQUES

Monitoring and Controlling

- Team performance x status x baseline
- Timelines and forecasting
- Deviations or changes
- Risks are mitigated and issues are being resolved
- Stakeholders are apprised of status.

Progress vs Timeline



[Project Name] Project Schedule

Gantt Chart Template © 2006-2018 by Vertex42.com.

[Company Name]

Project Start Date: 1/29/2018 (Monday) | Display Week: 1

Project Lead: Ted Harris

WBS	TASK	LEAD	START	END	DAYS	% DONE	WORK DAYS
1	[Task Category]			-			-
1.1	[Task]	[Name]	Mon 1/29/18	Fri 2/02/18	5	100%	5
1.2	[Task]		Sat 2/03/18	Wed 2/07/18	5	60%	3
1.3	[Task]		Thu 2/08/18	Sun 2/11/18	4	0%	2
1.4	[Task]		Thu 2/01/18	Sun 2/04/18	4	75%	2
1.4.1	[Sub-task]		Fri 2/02/18	Sat 2/03/18	2	50%	1
1.4.2	[Sub-task]		Sun 2/04/18	Tue 2/06/18	3	50%	2
1.5	[Task]		Mon 2/05/18	Fri 2/09/18	5	0%	5
1.6	[Task]		Sat 2/03/18	Fri 2/09/18	7	0%	5
1.7	[Task]		Sat 2/10/18	Fri 2/16/18	7	0%	5
2	[Task Category]			-			-
2.1	[Task]		Sat 2/10/18	Tue 2/13/18	4	0%	2
2.2	[Task]		Wed 2/14/18	Fri 2/16/18	3	0%	3
2.3	[Task]		Wed 2/14/18	Fri 2/16/18	3	0%	3
2.4	[Task]		Sat 2/17/18	Thu 2/22/18	6	0%	4
2.5	[Task]		Fri 2/23/18	Sun 2/25/18	3	0%	1
3	[Task Category]			-			-
3.1	[Task]		Sat 2/10/18	Tue 2/13/18	4	0%	2
3.2	[Task]		Wed 2/14/18	Fri 2/16/18	3	0%	3
3.3	[Task]		Wed 2/14/18	Fri 2/16/18	3	0%	3

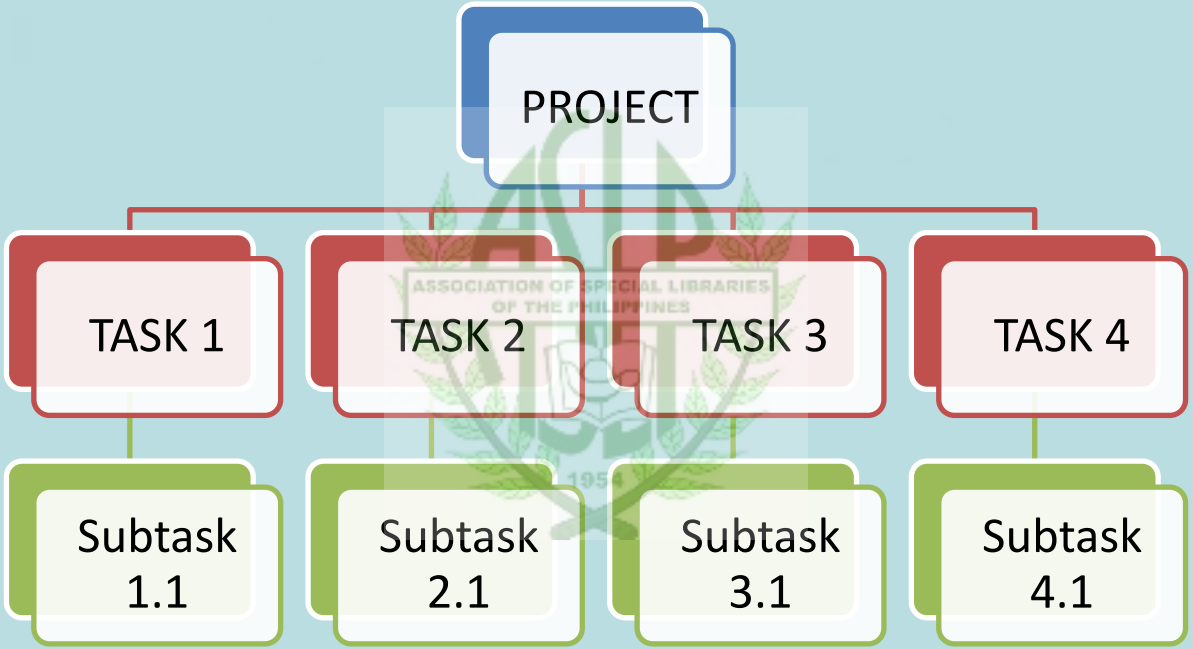
Week 1 — 29 Jan 2018 | Week 2 — 5 Feb 2018 | Week 3 — 12 Feb 2018

29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18

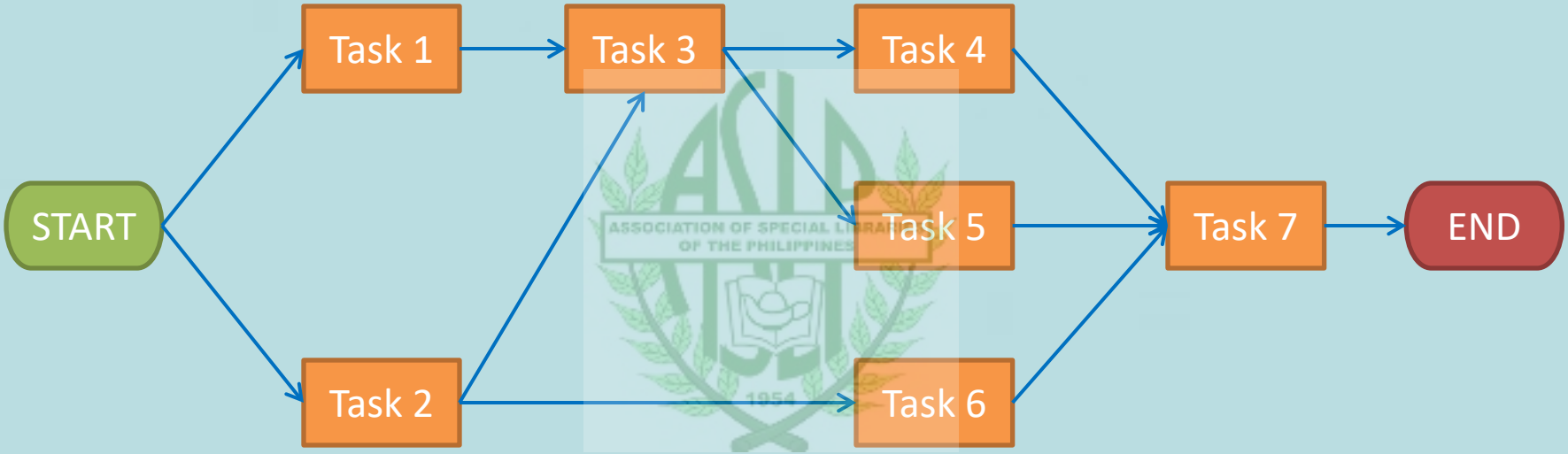
M T W T F S S M T W T F S S M T W T F S S

ASSOCIATION OF SPECIAL LIBRARIES OF THE PHILIPPINES 1954

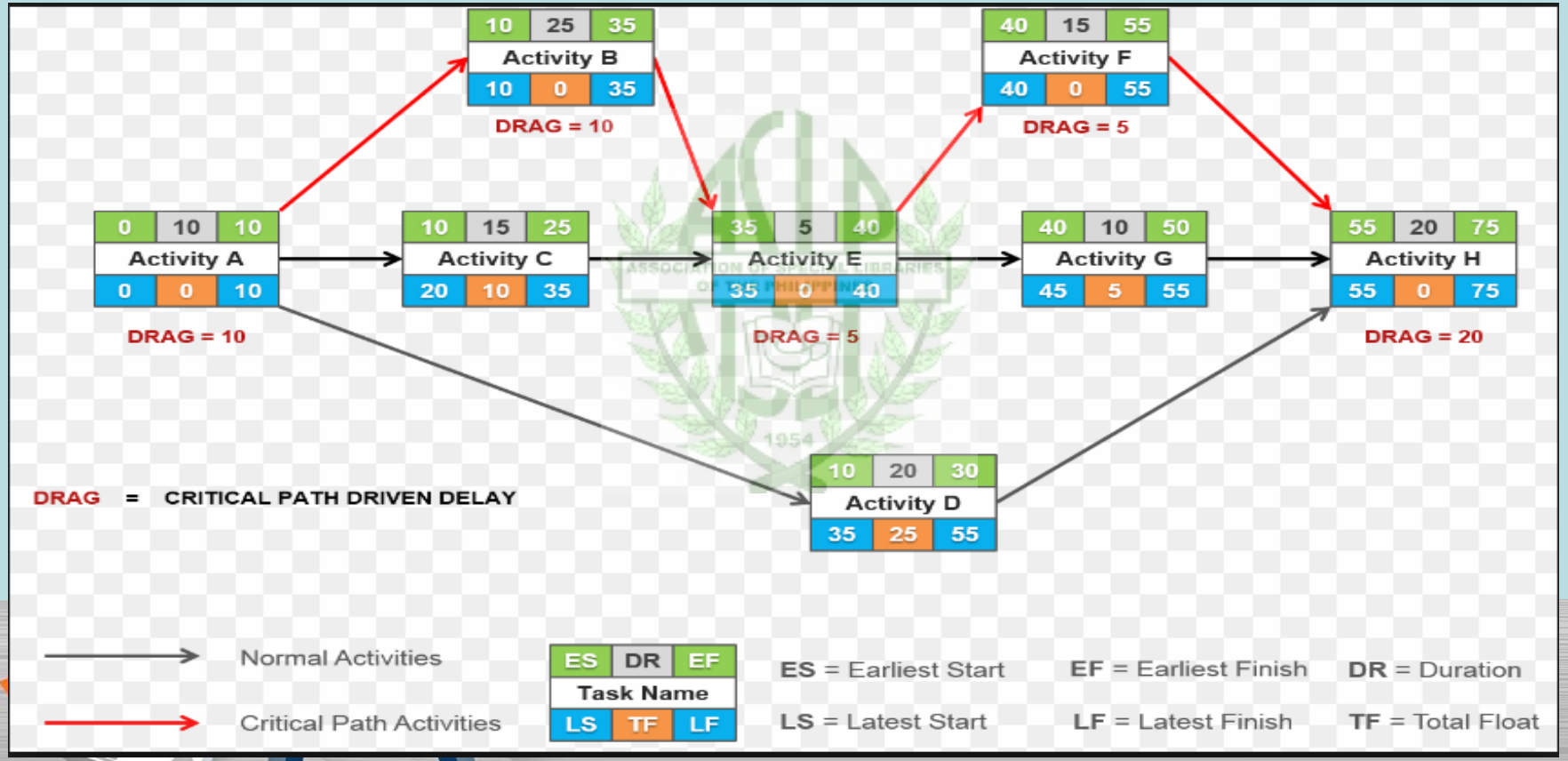
Work Breakdown

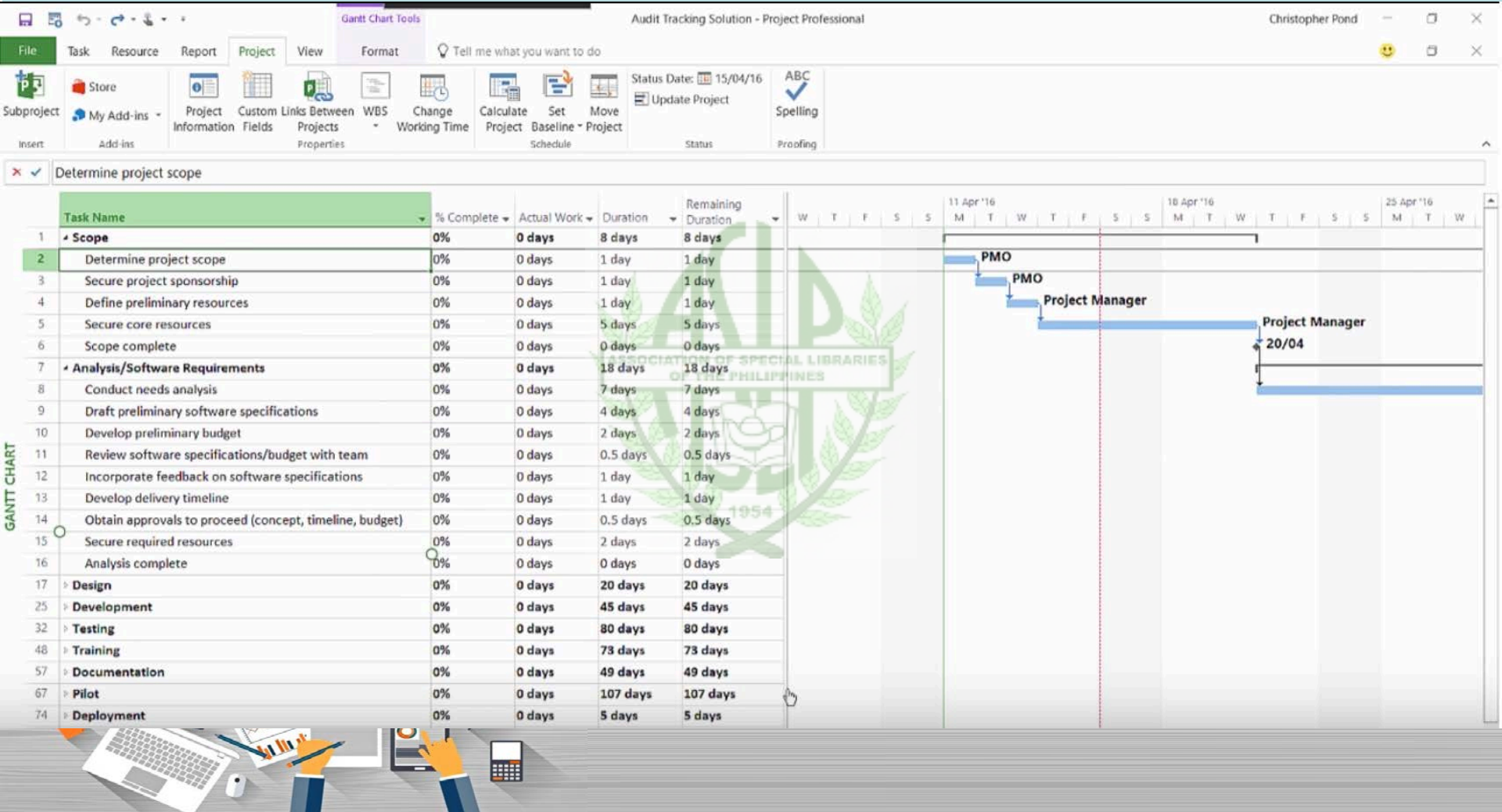


Task sequence



Task and Timeline Review




Gantt Chart Tools
Audit Tracking Solution - Project Professional
Christopher Pond
File
Task
Resource
Report
Project
View
Format
Tell me what you want to do
Subproject
Store
My Add-ins
Project Information
Custom Fields
Links Between Projects
WBS
Change Working Time
Calculate Project
Set Baseline
Move Project
Status Date: 15/04/16
Update Project
Spelling
Insert
Add-ins
Properties
Schedule
Status
Proofing
Determine project scope
GANTT CHART
Task Name
% Complete
Actual Work
Duration
Remaining Duration
11 Apr '16
18 Apr '16
25 Apr '16
1 Scope 0% 0 days 8 days 8 days
2 Determine project scope 0% 0 days 1 day 1 day
3 Secure project sponsorship 0% 0 days 1 day 1 day
4 Define preliminary resources 0% 0 days 1 day 1 day
5 Secure core resources 0% 0 days 5 days 5 days
6 Scope complete 0% 0 days 0 days 0 days
7 Analysis/Software Requirements 0% 0 days 18 days 18 days
8 Conduct needs analysis 0% 0 days 7 days 7 days
9 Draft preliminary software specifications 0% 0 days 4 days 4 days
10 Develop preliminary budget 0% 0 days 2 days 2 days
11 Review software specifications/budget with team 0% 0 days 0.5 days 0.5 days
12 Incorporate feedback on software specifications 0% 0 days 1 day 1 day
13 Develop delivery timeline 0% 0 days 1 day 1 day
14 Obtain approvals to proceed (concept, timeline, budget) 0% 0 days 0.5 days 0.5 days
15 Secure required resources 0% 0 days 2 days 2 days
16 Analysis complete 0% 0 days 0 days 0 days
17 Design 0% 0 days 20 days 20 days
25 Development 0% 0 days 45 days 45 days
32 Testing 0% 0 days 80 days 80 days
48 Training 0% 0 days 73 days 73 days
57 Documentation 0% 0 days 49 days 49 days
67 Pilot 0% 0 days 107 days 107 days
74 Deployment 0% 0 days 5 days 5 days
PMO
PMO
Project Manager
Project Manager
20/04

ProjectLibre *

ProjectLibre

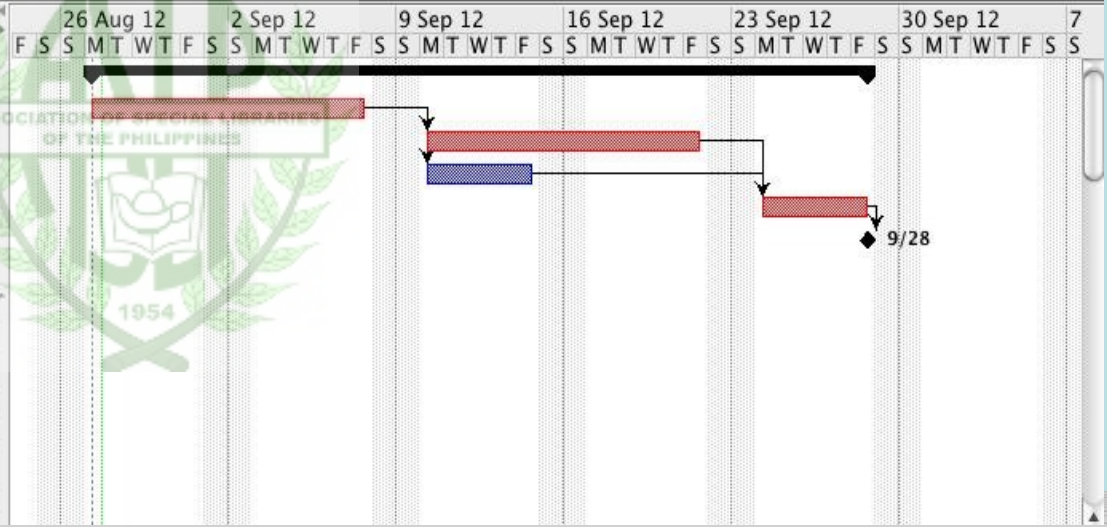
File | Task | Resource | View

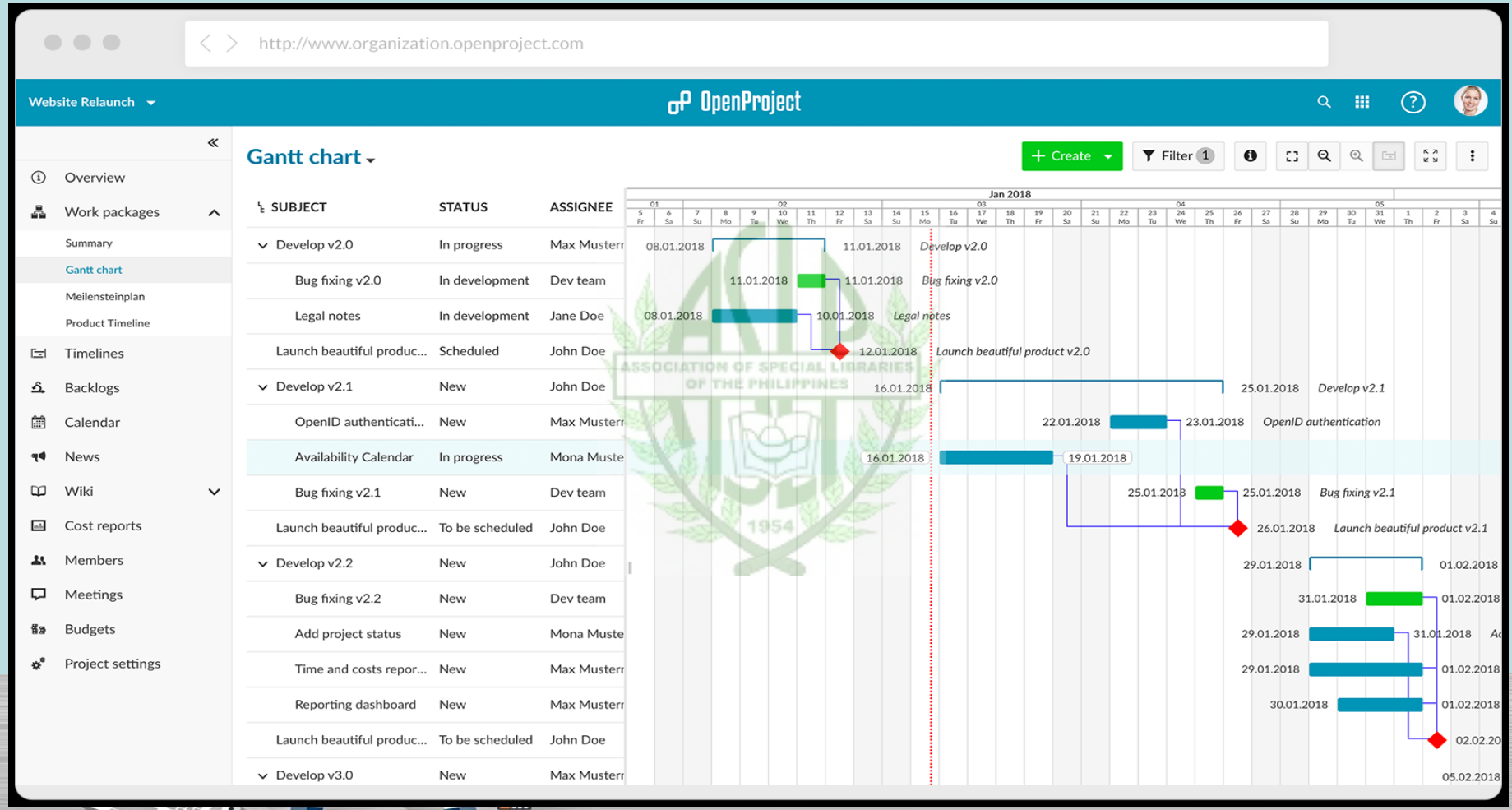
Gantt | Network | WBS | Task Usage | Zoom In | Zoom Out — Views

Paste | Copy | Cut | Delete — Clipboard

Outdent | Indent | Link | Unlink | Information | Calendar | Notes | Assign Resources | Insert | Find | Scroll To Task — Task

	Name	Duration	Start
1	Project Summary	25 days	8/27/12 8:00 AM
2	Design	10 days	8/27/12 8:00 AM
3	Development	10 days	9/10/12 8:00 AM
4	Document	5 days	9/10/12 8:00 AM
5	Test	5 days	9/24/12 8:00 AM
6	Rollout	0 days	9/28/12 5:00 PM




http://www.organization.openproject.com
Website Relaunch
OpenProject
Gantt chart
Create
Filter 1
Overview
Work packages
Summary
Gantt chart
Meilensteinplan
Product Timeline
Timelines
Backlogs
Calendar
News
Wiki
Cost reports
Members
Meetings
Budgets
Project settings
SUBJECT
STATUS
ASSIGNEE
Develop v2.0 In progress Max Muster
Bug fixing v2.0 In development Dev team
Legal notes In development Jane Doe
Launch beautiful produc... Scheduled John Doe
Develop v2.1 New John Doe
OpenID authenticati... New Max Muster
Availability Calendar In progress Mona Muste
Bug fixing v2.1 New Dev team
Launch beautiful produc... To be scheduled John Doe
Develop v2.2 New John Doe
Bug fixing v2.2 New Dev team
Add project status New Mona Muste
Time and costs repor... New Max Muster
Reporting dashboard New Max Muster
Launch beautiful produc... To be scheduled John Doe
Develop v3.0 New Max Muster
Jan 2018
08.01.2018
11.01.2018
Develop v2.0
11.01.2018
11.01.2018
Bug fixing v2.0
08.01.2018
10.01.2018
Legal notes
12.01.2018
Launch beautiful product v2.0
16.01.2018
25.01.2018
Develop v2.1
22.01.2018
23.01.2018
OpenID authentication
16.01.2018
19.01.2018
25.01.2018
25.01.2018
Bug fixing v2.1
26.01.2018
Launch beautiful product v2.1
29.01.2018
01.02.2018
31.01.2018
01.02.2018
29.01.2018
31.01.2018
29.01.2018
01.02.2018
30.01.2018
01.02.2018
02.02.20
05.02.2018

JIRA Dashboards Projects Issues Boards Create

Teams in Space
Scrum: Teams in Space

- Backlog
- Active sprints
- Releases
- Reports
- Issues
- Components

PROJECT SHORTCUTS

- Mercury Team HipChat Room
- Development Guide
- Spotify Team Play List
- TIS Roadmap
- TIS Team Org Structure
- Add link

Give feedback

Project administration

All sprints

Switch sprint

0 days remaining Complete Sprint Board

QUICK FILTERS: Product UI Server Only My Issues Recently Updated

12 To Do	4 In Progress	1 Code Review	7 Done

TIS Developer Love 3 issues

To Do

TIS-37
When requesting user details the service should return prior trip
SeeSpaceEZ Plus 2

In Progress

TIS-10
Bad JSON data coming back from hotel API
SeeSpaceEZ Plus

Done

TIS-8
Requesting avaliable flights is now taking > 5 seconds
SeeSpaceEZ Plus

Everything Else 21 issues

To Do

TIS-68
Homepage footer uses an inline style - should use a class
Large Team Support

TIS-20
Engage Saturn Shuttle Lines for group tours
Space Travel Partn... 3

TIS-12
Create 90 day plans for all departments in the Mars Office
Local Mars Office 9

TIS-15
Establish a catering vendor to provide meal service
Local Mars Office 4

In Progress

TIS-17
Engage Saturn's Rings Resort as a preferred provider
Space Travel Partn... 3

TIS-26
Engage the Red Titan Hotel as a preferred provider
Space Travel Partn... 3

TIS-33
Select key travel partners for the Saturn Summer Sizzle
Summer Saturn Sale 1

Code Review

TIS-67
Developer Toolbox does not display by default
Large Team Support

Done

TIS-56
Add pointer to main css file to instruct users to create child themes
Large Team Support

TIS-45
Email non registered users to sign up with Teams In Space
Large Team Support 2

TIS-49
Draft network plan for Mars Office
Local Mars Office 5

TIS-69
Add a String anonymizer to TextUtils
Large Team Support

TIS-23

Teams in Space / TIS-67

Developer Toolbox does not display by default

Attach Files

Screen Shot 2015-08-13 at 4.1
326 kB 20/Aug/15 12:08 PM

Sub-Tasks

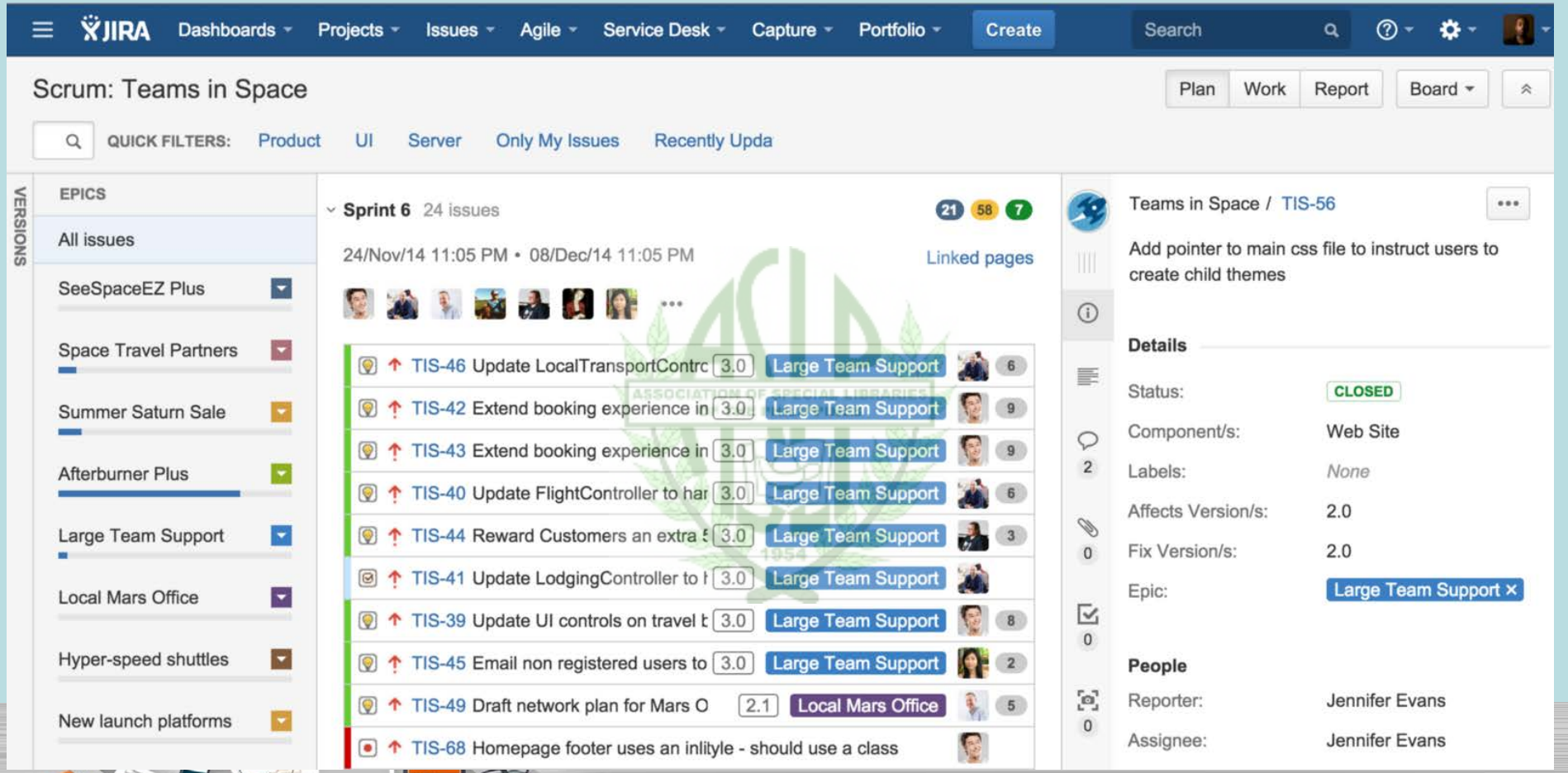
Create Sub-Task

Issue Key	Summary	Status	Actions
TIS-127	Check Java version	OPEN	

Development

1 branch — Updated 17/May/14 7:32 AM
7 commits — Latest 17/May/14 7:30 AM
1 pull request OPEN — Updated 17/May/14 7:32 AM
3 builds — Latest 16/May/14 2:31 PM

Deployed to Staging and Production


JIRA
Dashboards
Projects
Issues
Agile
Service Desk
Capture
Portfolio
Create
Search
Scrum: Teams in Space
Plan
Work
Report
Board
QUICK FILTERS:
Product
UI
Server
Only My Issues
Recently Upda
VERSIONS
EPICS
All issues
SeeSpaceEZ Plus
Space Travel Partners
Summer Saturn Sale
Afterburner Plus
Large Team Support
Local Mars Office
Hyper-speed shuttles
New launch platforms
Sprint 6 24 issues
21
58
7
24/Nov/14 11:05 PM • 08/Dec/14 11:05 PM
Linked pages
TIS-46 Update LocalTransportContrc 3.0 Large Team Support 6
TIS-42 Extend booking experience in 3.0 Large Team Support 9
TIS-43 Extend booking experience in 3.0 Large Team Support 9
TIS-40 Update FlightController to har 3.0 Large Team Support 6
TIS-44 Reward Customers an extra 5 3.0 Large Team Support 3
TIS-41 Update LodgingController to I 3.0 Large Team Support
TIS-39 Update UI controls on travel t 3.0 Large Team Support 8
TIS-45 Email non registered users to 3.0 Large Team Support 2
TIS-49 Draft network plan for Mars O 2.1 Local Mars Office 5
TIS-68 Homepage footer uses an inlityle - should use a class
Teams in Space / TIS-56
Add pointer to main css file to instruct users to create child themes
Details
Status: CLOSED
Component/s: Web Site
Labels: None
Affects Version/s: 2.0
Fix Version/s: 2.0
Epic: Large Team Support ×
People
Reporter: Jennifer Evans
Assignee: Jennifer Evans

Access - Bizagi Modeler

File Home Format View Publish Export / Import Tools Help Sign In

Paste Clipboard

Diagrams Run Workflow Simulation View Resources Validate Info Model

Save as Share Bizagi Cloud

Segoe UI 8 Formatting

Find Select Delete Editing

Spelling Review

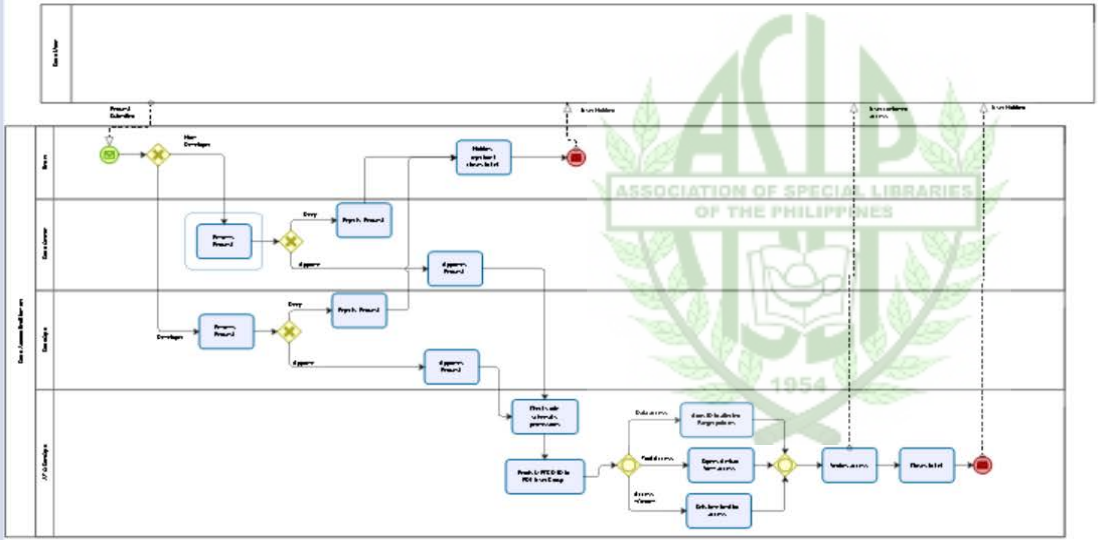
Bizagi Suite Online Courses Discover

Palette

Flow

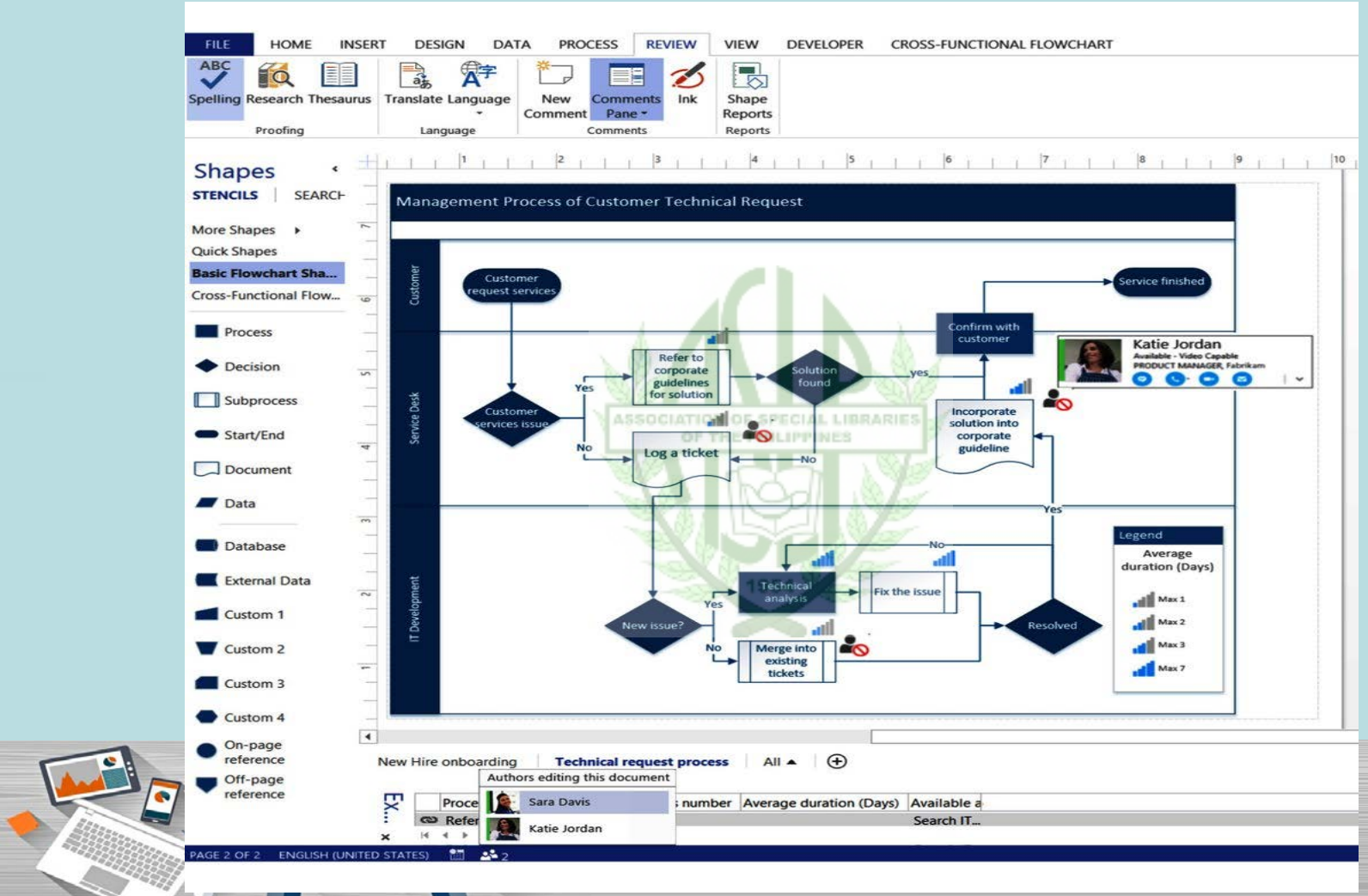
Data

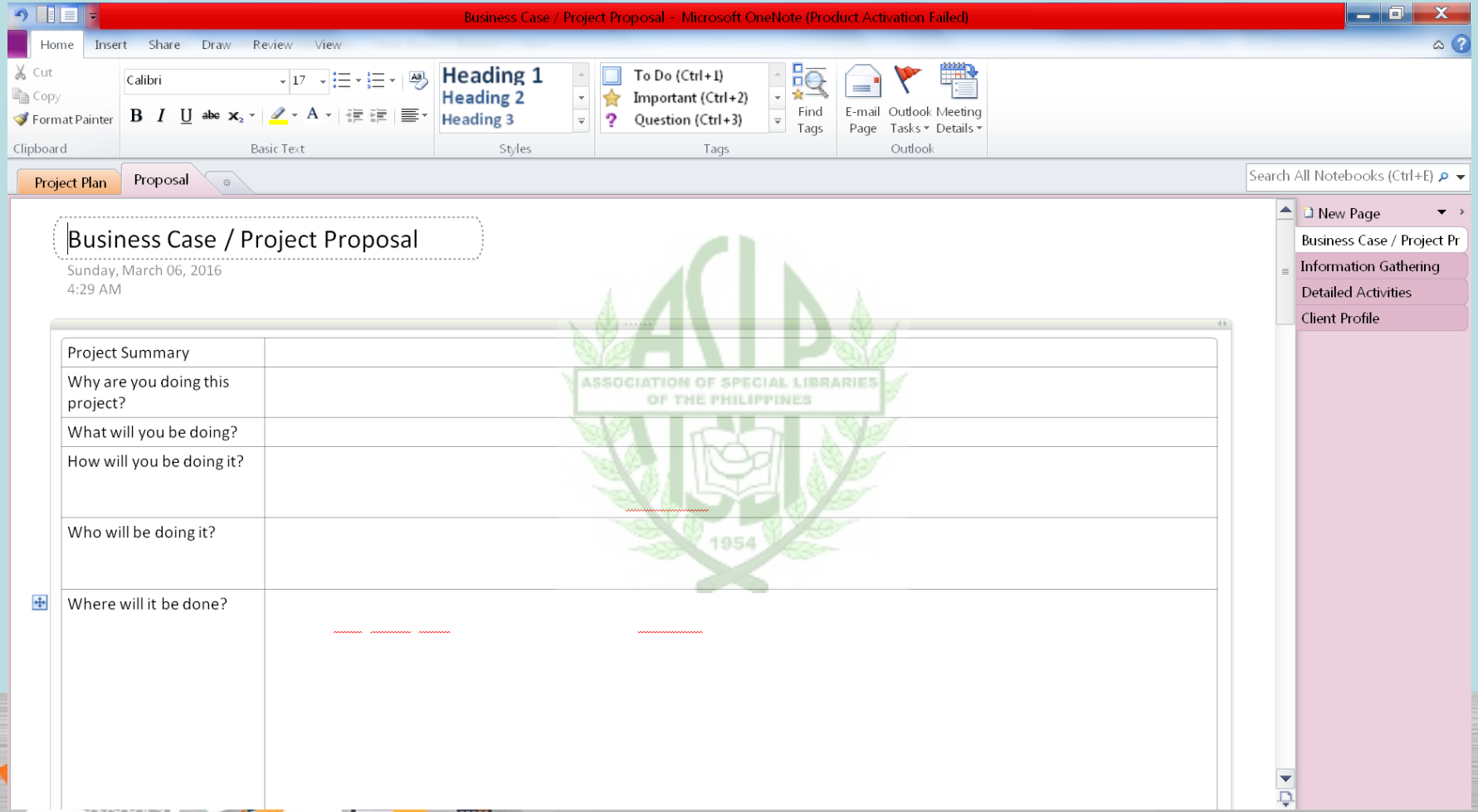
Diagram 1

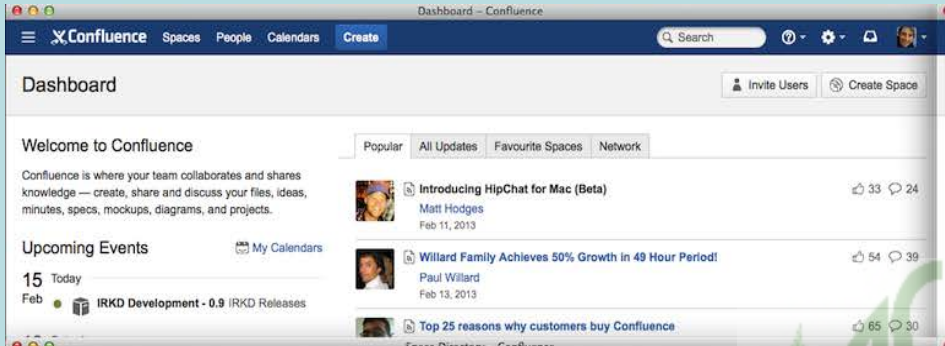


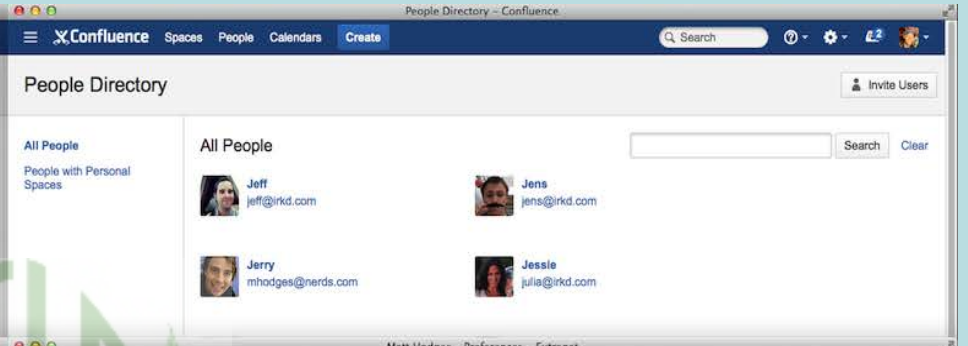
ASSOCIATION OF SPECIAL LIBRARIES OF THE PHILIPPINES 1954

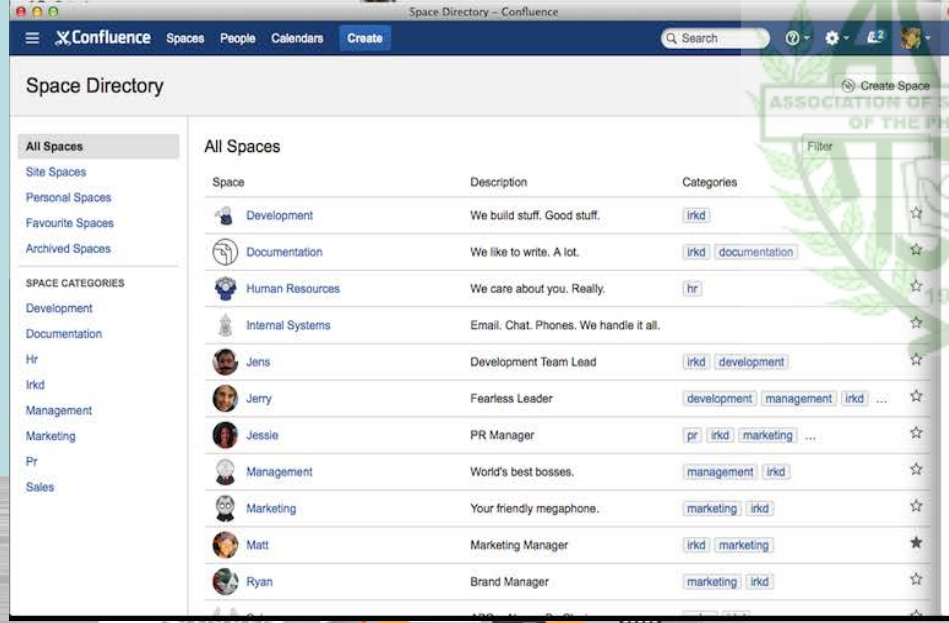
40%

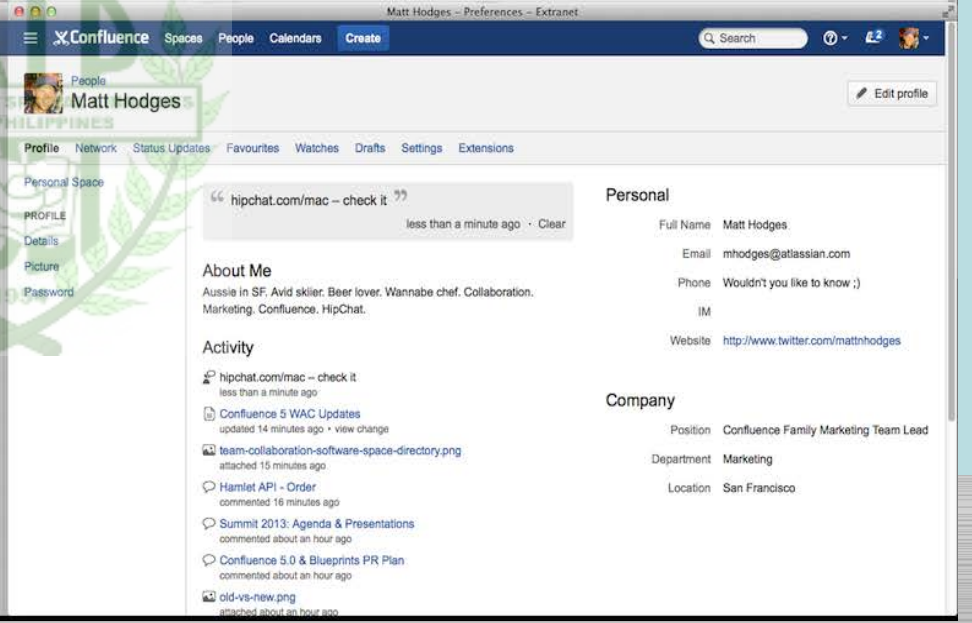

FILE
HOME
INSERT
DESIGN
DATA
PROCESS
REVIEW
VIEW
DEVELOPER
CROSS-FUNCTIONAL FLOWCHART
Spelling
Research
Thesaurus
Translate
Language
New Comment
Comments Pane
Ink
Shape Reports
Proofing
Language
Comments
Reports
Shapes
STENCILS
SEARCH
More Shapes
Quick Shapes
Basic Flowchart Sha...
Cross-Functional Flow...
Process
Decision
Subprocess
Start/End
Document
Data
Database
External Data
Custom 1
Custom 2
Custom 3
Custom 4
On-page reference
Off-page reference
Management Process of Customer Technical Request
Customer
Service Desk
IT Development
Customer request services
Customer services issue
Yes
No
Refer to corporate guidelines for solution
Solution found
yes
Log a ticket
No
Service finished
Confirm with customer
Incorporate solution into corporate guideline
Katie Jordan
Available - Video Capable
PRODUCT MANAGER, Fabrikam
Yes
No
Technical analysis
Fix the issue
New issue?
Yes
No
Merge into existing tickets
Resolved
Legend
Average duration (Days)
Max 1
Max 2
Max 3
Max 7
New Hire onboarding
Technical request process
All
Authors editing this document
Sara Davis
Katie Jordan
Average duration (Days)
Search IT...
PAGE 2 OF 2
ENGLISH (UNITED STATES)

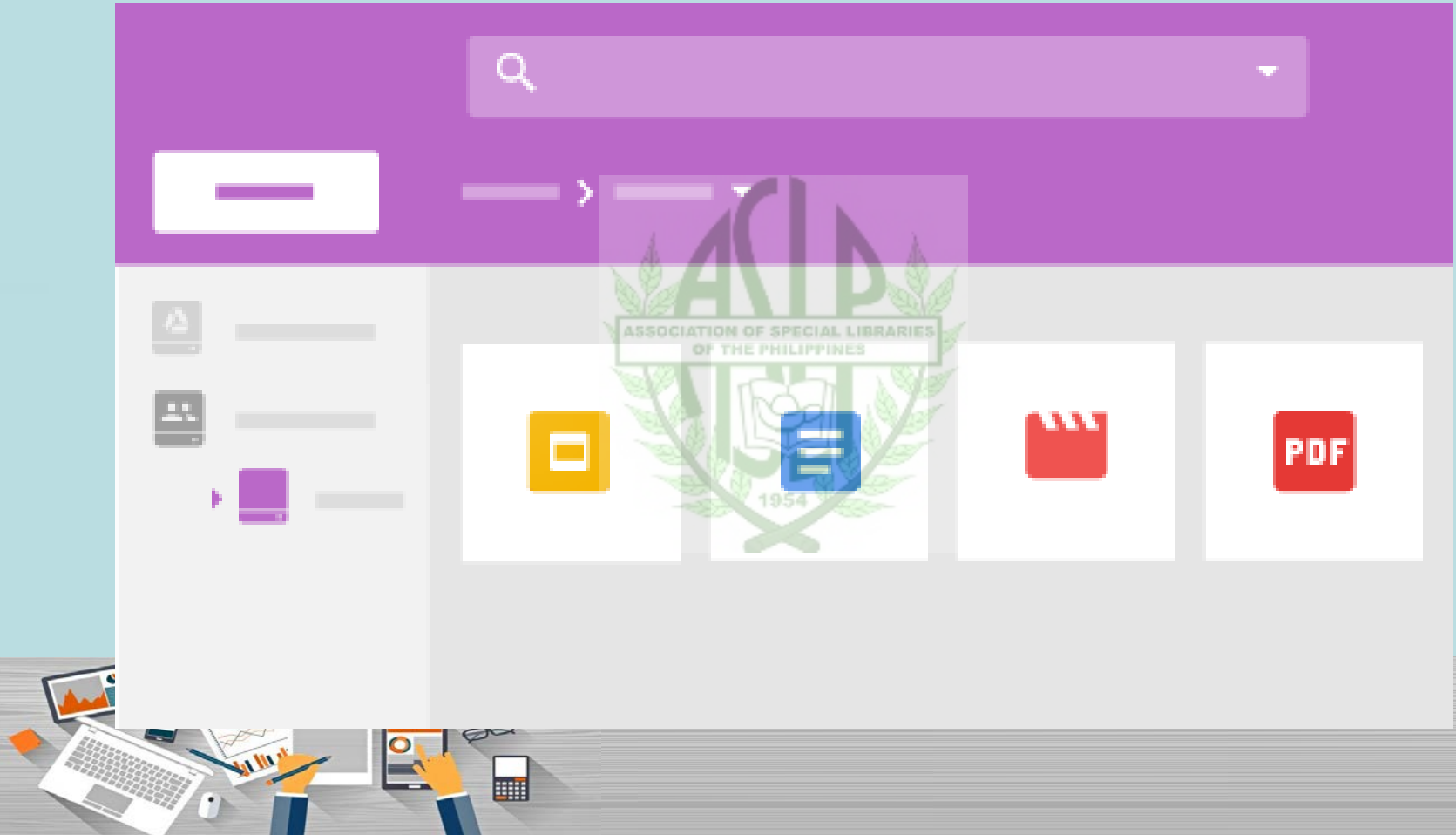

Business Case / Project Proposal - Microsoft OneNote (Product Activation Failed)
Home
Insert
Share
Draw
Review
View
Cut
Copy
Format Painter
Clipboard
Calibri
17
Basic Text
Heading 1
Heading 2
Heading 3
Styles
To Do (Ctrl+1)
Important (Ctrl+2)
Question (Ctrl+3)
Find Tags
Tags
E-mail Page
Outlook Tasks
Meeting Details
Outlook
Project Plan
Proposal
Search All Notebooks (Ctrl+E)
Business Case / Project Proposal
Sunday, March 06, 2016
4:29 AM
Project Summary
Why are you doing this project?
What will you be doing?
How will you be doing it?
Who will be doing it?
Where will it be done?
New Page
Business Case / Project Pr
Information Gathering
Detailed Activities
Client Profile

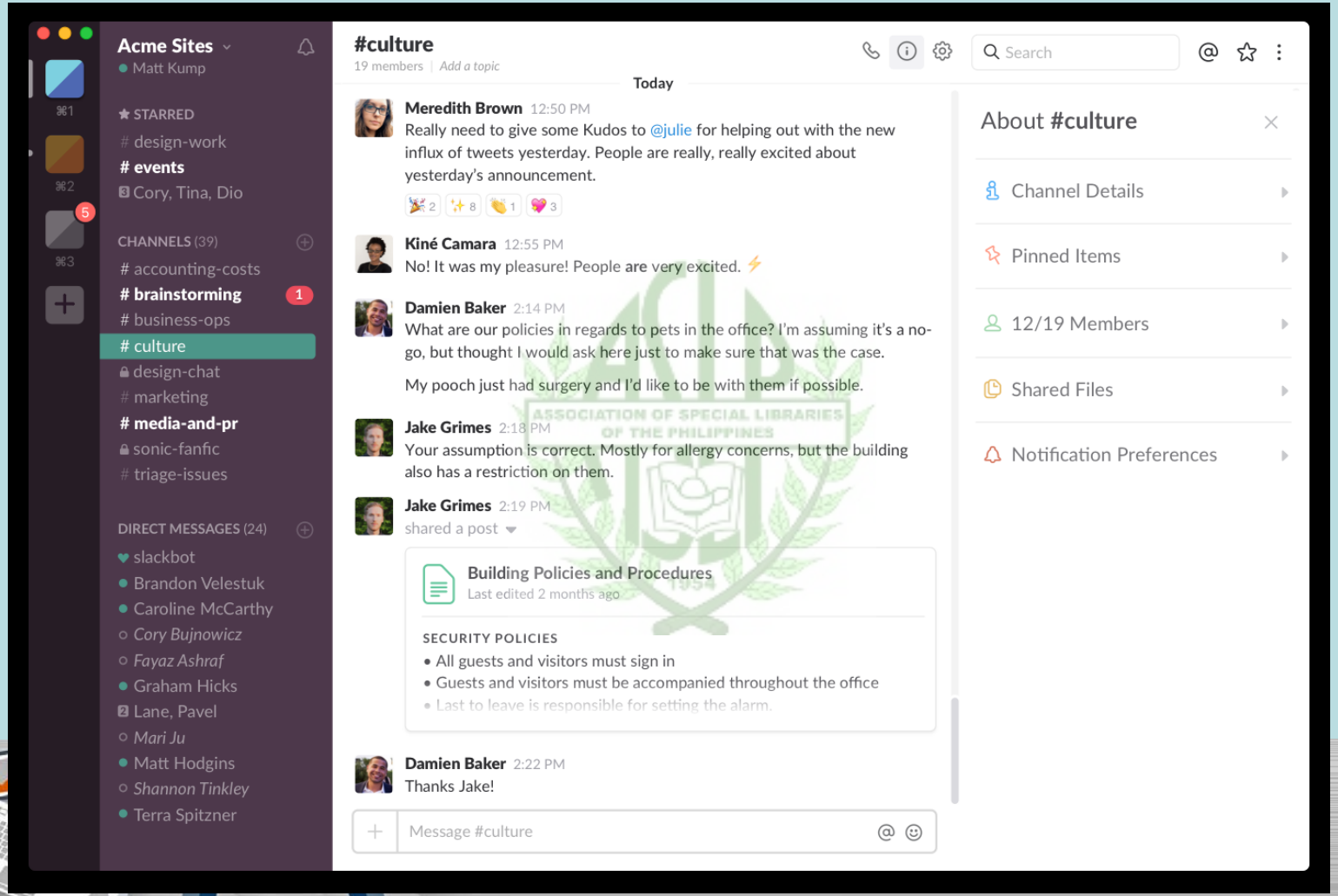

Dashboard – Confluence
Confluence
Spaces
People
Calendars
Create
Search
Dashboard
Invite Users
Create Space
Welcome to Confluence
Confluence is where your team collaborates and shares knowledge — create, share and discuss your files, ideas, minutes, specs, mockups, diagrams, and projects.
Upcoming Events
My Calendars
15 Today
Feb
IRKD Development - 0.9 IRKD Releases
Popular
All Updates
Favourite Spaces
Network
Introducing HipChat for Mac (Beta)
Matt Hodges
Feb 11, 2013
33
24
Willard Family Achieves 50% Growth in 49 Hour Period!
Paul Willard
Feb 13, 2013
54
39
Top 25 reasons why customers buy Confluence
65
30


People Directory – Confluence
Confluence
Spaces
People
Calendars
Create
Search
People Directory
Invite Users
All People
People with Personal Spaces
All People
Search
Clear
Jeff
jeff@irkd.com
Jens
jens@irkd.com
Jerry
mhodges@nerds.com
Jessie
julia@irkd.com


Space Directory – Confluence
Confluence
Spaces
People
Calendars
Create
Search
Space Directory
Create Space
All Spaces
Site Spaces
Personal Spaces
Favourite Spaces
Archived Spaces
SPACE CATEGORIES
Development
Documentation
Hr
Irkd
Management
Marketing
Pr
Sales
All Spaces
Filter
Space
Description
Categories
Development
We build stuff. Good stuff.
irkd
Documentation
We like to write. A lot.
irkd
documentation
Human Resources
We care about you. Really.
hr
Internal Systems
Email. Chat. Phones. We handle it all.
Jens
Development Team Lead
irkd
development
Jerry
Fearless Leader
development
management
irkd
Jessie
PR Manager
pr
irkd
marketing
Management
World's best bosses.
management
irkd
Marketing
Your friendly megaphone.
marketing
irkd
Matt
Marketing Manager
irkd
marketing
Ryan
Brand Manager
marketing
irkd

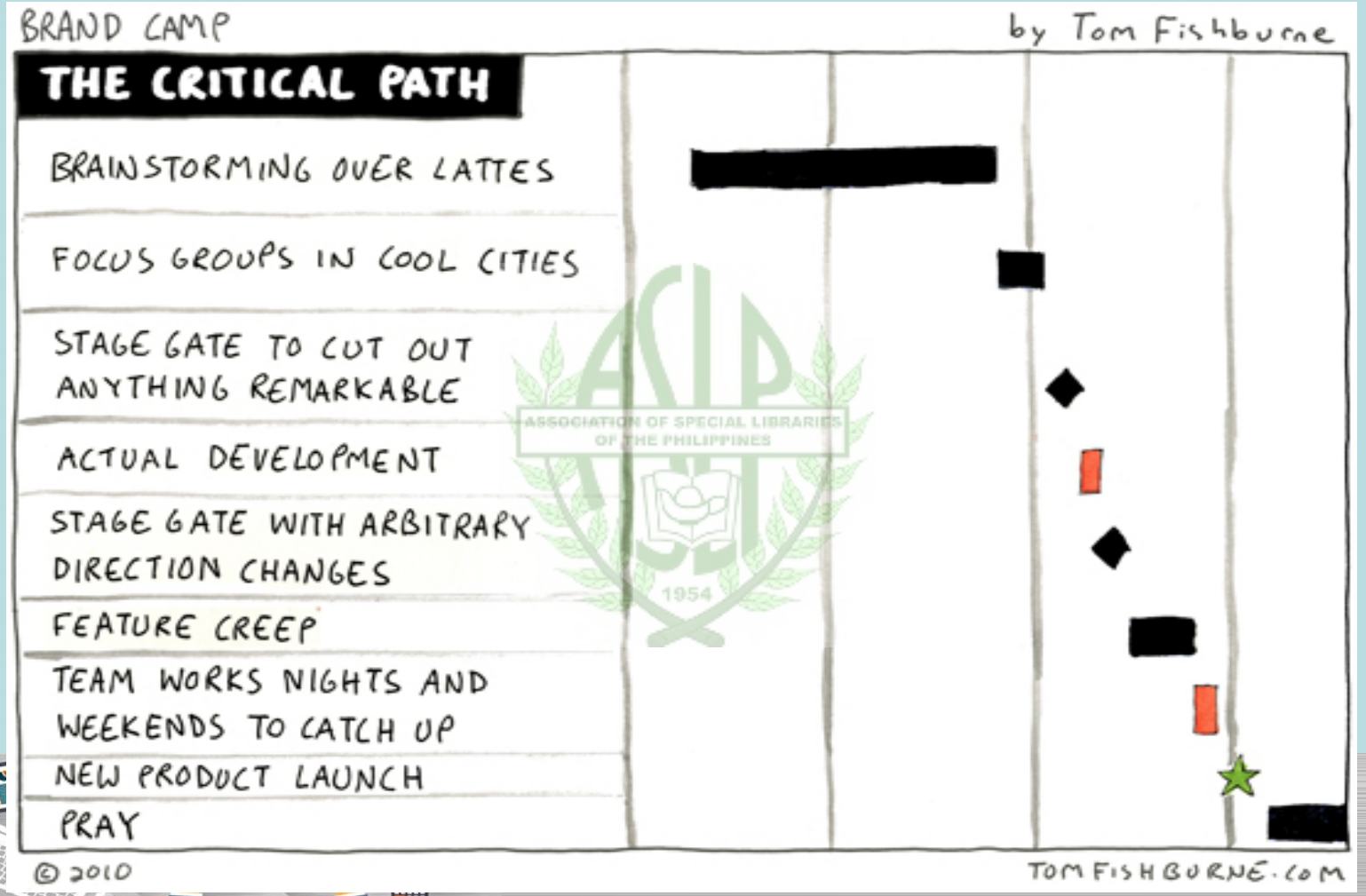

Matt Hodges – Preferences – Extranet
Confluence
Spaces
People
Calendars
Create
Search
People
Matt Hodges
Edit profile
Profile
Network
Status Updates
Favourites
Watches
Drafts
Settings
Extensions
Personal Space
PROFILE
Details
Picture
Password
hipchat.com/mac – check it
less than a minute ago · Clear
About Me
Aussie in SF. Avid skiier. Beer lover. Wannabe chef. Collaboration. Marketing. Confluence. HipChat.
Activity
hipchat.com/mac – check it
less than a minute ago
Confluence 5 WAC Updates
updated 14 minutes ago • view change
team-collaboration-software-space-directory.png
attached 15 minutes ago
Hamlet API - Order
commented 16 minutes ago
Summit 2013: Agenda & Presentations
commented about an hour ago
Confluence 5.0 & Blueprints PR Plan
commented about an hour ago
old-vs-new.png
Personal
Full Name Matt Hodges
Email mhodges@atlassian.com
Phone Wouldn't you like to know ;)
IM
Website http://www.twitter.com/mattnhodges
Company
Position Confluence Family Marketing Team Lead
Department Marketing
Location San Francisco


PDF


Acme Sites
Matt Kump
⌘1
⌘2
⌘3
STARRED
design-work
events
Cory, Tina, Dio
CHANNELS (39)
accounting-costs
brainstorming
business-ops
culture
design-chat
marketing
media-and-pr
sonic-fanfic
triage-issues
DIRECT MESSAGES (24)
slackbot
Brandon Velestuk
Caroline McCarthy
Cory Bujnowicz
Fayaz Ashraf
Graham Hicks
Lane, Pavel
Mari Ju
Matt Hodgins
Shannon Tinkley
Terra Spitzner
#culture
19 members | Add a topic
Search
Today
Meredith Brown 12:50 PM
Really need to give some Kudos to @julie for helping out with the new influx of tweets yesterday. People are really, really excited about yesterday's announcement.
Kiné Camara 12:55 PM
No! It was my pleasure! People are very excited.
Damien Baker 2:14 PM
What are our policies in regards to pets in the office? I'm assuming it's a no-go, but thought I would ask here just to make sure that was the case.
My pooch just had surgery and I'd like to be with them if possible.
Jake Grimes 2:18 PM
Your assumption is correct. Mostly for allergy concerns, but the building also has a restriction on them.
Jake Grimes 2:19 PM
shared a post
Building Policies and Procedures
Last edited 2 months ago
SECURITY POLICIES
• All guests and visitors must sign in
• Guests and visitors must be accompanied throughout the office
• Last to leave is responsible for setting the alarm.
Damien Baker 2:22 PM
Thanks Jake!
Message #culture
About #culture
Channel Details
Pinned Items
12/19 Members
Shared Files
Notification Preferences

Samples

- Process flow
- Project proposal


BRAND CAMP
by Tom Fishburne
THE CRITICAL PATH
BRAINSTORMING OVER LATTES
FOCUS GROUPS IN COOL CITIES
STAGE GATE TO CUT OUT ANYTHING REMARKABLE
ACTUAL DEVELOPMENT
STAGE GATE WITH ARBITRARY DIRECTION CHANGES
FEATURE CREEP
TEAM WORKS NIGHTS AND WEEKENDS TO CATCH UP
NEW PRODUCT LAUNCH
PRAY
© 2010
TOMFISHBURNE.COM

Questions

- Give two knowledge areas of project management which you think is important for you in your work as a librarian.
- Look back on a project you did in your library, among the ideas presented, which knowledge area do you think your project may have been successful with? Explain briefly.
- Where do you think it may have failed? Explain briefly.