Project Management Life Cycle (PMLC)

Section 1
Outline
Project Management Life Cycle

→ PMLC Background
→ PMLC Overview
→ Phases In Depth
  □ Idea
  □ Proposal
PMLC Purpose
Project Management Life Cycle

Employ a project management life cycle intended to enable standardization of methodology, documentation, terminology and approval across organizations, while enabling clear ownership and empowerment of project leadership.
PMLC Collaboration
Project Management Life Cycle

Working Group

- IT Business Process Management (BPM)
- IT Project Management Office (PMO)
- Finance System Support (FSS)
- Business Management and Analysis Group (BMAG)
PMLC Timeline
Project Management Life Cycle

- It is the stated objective that any complex cross functional initiative requiring the use of a trained project manager for all EVP&T and University-wide technology initiatives will use PMLC
- Process may be modified based on lessons learned
- For feedback or support on PMLC, contact Adam
Case Study
Project Management Life Cycle

How the customer described it
How the executive sponsors envisioned it
How the project owner proposed it
Case Study
Project Management Life Cycle

How the analyst designed it
How the project team planned it
How the developers built it
Case Study
Project Management Life Cycle

How the implementation team tested it

How the project was documented

What was actually deployed to the users
Case Study
Project Management Life Cycle
Basic Project Life Cycle

Project Management Life Cycle

- Initiating
- Planning
- Monitoring & Controlling
- Executing
- Closing
Initiating
Project Management Life Cycle

- Quick summary and review of an idea
- Determine if worth expending resources

- Begin gathering requirements
- Provide detail proposal of solution
- If accepted, charter the project
Planning

Project Management Life Cycle

- Develop schedule, plans and requirements for implementation
- Acquire resources and engage the project team
Executing
Project Management Life Cycle

- Transform business requirements into actionable items
- Design and develop the planned solution

- Validate the solution against the business requirements
- Verify deployment readiness

- Verify solution deployment per plan
- Prepare to transition project to operational organization
Monitoring & Controlling

Project Management Life Cycle

- Schedule / Resource Management
- Risk Management
- Change Management
- Stakeholder Management
Closing

Project Management Life Cycle

- Receive approval to close the project
- Transition project items to the operational owner
- Perform Lessons Learned
Process Comparison
Project Management Life Cycle

Initiating → Planning → Executing → Closing

Request → Chartered Project → Monitoring & Controlling
Phase Gates
Project Management Life Cycle

Phase Gate Reviews

- Reviewers are Executive Sponsors
- Receive approval to proceed to the next phase
- Serves as point to monitor the health of a project
- Clarify project attributes such as roles, milestones, and schedules
- Make major decisions about the direction for upcoming phases
PMLC “Lite”

Project Management Life Cycle

- Artifacts for phases can be modified by Gate Review approval
- Phases can be combined by Gate Review approval
- Key is that modifications must be approved by Gate Review
PMLC “Lite”
Project Management Life Cycle

At a minimum, PMLC “Lite” will include:

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<th>Phase Gates</th>
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~Protect integrity of the process~
Project Leadership
Project Management Life Cycle

Executive Sponsor  Project Owner

Project Manager  Project Leads
Project Leadership

Project Management Life Cycle

Executive Sponsor

Project Owner
Director-level accountable owner of the solution

Process Initiator
Manages request analysis

Project Manager
Manages overall project team

Project Leads
Responsible for deliverables

Charter
Project Resources

Project Management Life Cycle:

- **Idea**
- **Proposal**
- **Planning**
- **Analysis, Design & Development**
- **Testing & Readiness**
- **Post Go Live**
- **Closing**

**Request**

**Chartered Project**
Idea Phase - Process
Project Management Life Cycle

Input

Owner has an idea for a project

Engage Process Initiator
(Dept, BMAG, FSS, Others)

Project Request Form

Process Initiator

Project Owner / Requestor

Idea
Proposal
Planning
Analysis, Design & Development
Testing & Readiness
Post Go Live
Closing
Idea Phase - Process

Project Management Life Cycle

**Activities**

- ID initial stakeholders
- Define business need
- Perform initial high-level cost / benefit analysis
- Complete Idea Summary
- Determine *Initial* Gate Reviewers
- Ensure support from stakeholder VPs

**Gate Review**

- **Proceed to Proposal?**
  - Yes
  - No
    - Delay or discard the idea

- **< 40 Staff Hours**

**Process Initiator**

**Idea**

**Proposal**

**Planning**

**Analysis, Design & Development**

**Testing & Readiness**

**Post Go Live**

**Closing**
Idea Phase - Activities

Project Management Life Cycle

Activities

✓ ID initial stakeholders
✓ Define business need
✓ Perform initial high-level cost / benefit analysis
✓ Complete Idea Summary
✓ Determine Initial Gate Review Board
✓ Ensure support from stakeholder VPs

Stakeholder / Team Construct Checklist
Idea Phase - Activities

Project Management Life Cycle

Activities

✓ ID initial stakeholders
✓ Define business need
✓ Perform initial high-level cost / benefit analysis
✓ Complete Idea Summary
✓ Determine Initial Gate Review Board
✓ Ensure support from stakeholder VPs

Idea Summary

- Expand Project Request Form to detail Business Need
- Detail an initial high-level benefit analysis
- Complete the 1 – 2 page executive summary
Idea Phase - Activities

Project Management Life Cycle

- Work with Owner to identify Executive Sponsors
- Identify any key senior stakeholders with significant impact
- Notify these folks of the idea and schedule a gate review meeting

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Idea Phase – Gate Review
Project Management Life Cycle

Activities
- ID initial stakeholders
- Define business need
- Perform initial high-level cost / benefit analysis
- Complete Idea Summary
- Determine Initial Gate Review Board
- Ensure support from stakeholder VPs

If Idea Approved:
- ✔ Decision to proceed to Proposal Phase
- ✔ Determination of artifacts required, participants required and/or action items for next phase
- ✔ Meeting minutes with decisions made

If Idea Rejected:
- ☑ Plan to notify stakeholders
- ☑ Plan to revisit at a later date, if applicable
- ☑ Meeting minutes with decisions made
Proposal Phase - Process
Project Management Life Cycle

Input

Activities
- Engage stakeholders
- Develop Proposal
- Preliminary IT security / compliance review
- Contract Ts & Cs
- Begin Business Requirements Gathering
- Develop Project Charter

~ 120 Staff Hours

Gate Review

Authorize the Proposal?

Yes

No

Delay authorization, Re-propose, Reject the proposal

Process Initiator

Prop Gate

Idea Proposal Planning Analysis, Design & Development Testing & Readiness Post Go Live Closing
Proposal Phase - Process

Project Management Life Cycle

Review Project Charter

Approve the Charter?

Yes

Project Authorized
Engage Project Manager

No

Rewrite the Project Charter

Output

Prop Gate

Idea → Proposal → Planning → Analysis, Design & Development → Testing & Readiness → Post Go Live → Closing
Proposal Phase - Activities

Project Management Life Cycle

Activities

✓ Engage stakeholders
✓ Develop Proposal
✓ Preliminary security / compliance review
✓ Contract Ts & Cs
✓ Begin Business Requirements Gathering
✓ Develop Project Charter

Re-evaluate stakeholders using Stakeholder / Team Construct Checklist
Proposal Phase - Activities
Project Management Life Cycle

Activities

- Engage stakeholders
- **Develop Proposal**
- Preliminary security / compliance review
- Contract Ts & Cs
- Begin Business Requirements Gathering
- Develop Project Charter

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### Proposal Phase - Activities

**Project Management Life Cycle**

- Engage Compliance and/or IT Security for an initial review, if applicable
- Review for “show stopper” issues
- IT has an official process for security review

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Proposal Phase - Activities

Project Management Life Cycle

- If any contracts, gather Ts and Cs
- Provide to OGC for review
- Executive Sponsors can review at Gate Review if desired

Activities

- Engage stakeholders
- Develop Proposal
- Preliminary security / compliance review
- Contract Ts & Cs
- Begin Business Requirements Gathering
- Develop Project Charter
Proposal Phase - Activities

Project Management Life Cycle

- Engage stakeholders
- Develop Proposal
- Preliminary security / compliance review
- Contract Ts & Cs
- Begin Business Requirements Gathering
- Develop Project Charter

- Document the “what” of the idea at an actionable level
- Can be baselined before or after the Proposal Gate Review
Proposal Phase - Activities

Project Management Life Cycle

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PMLC Project Charter
Proposal Phase – Gate Review

Project Management Life Cycle

If Proposal Approved:

- Decision to proceed to the Planning Phase
- Proposal & Charter signed by Owner/Sponsors
- If Charter changed by review – action to update charter and obtain signatures offline
- Determination of artifacts required, participants required and/or action items for next phase
- Meeting minutes with decisions made

If Proposal Rejected:

- Plan to notify stakeholders
- Plan to revisit at a later date, if applicable
- Meeting minutes with decisions made
Project Authorized

Project Management Life Cycle

✓ The idea request officially becomes a project
✓ If Process Initiator differs from Project Manager, project handoff occurs
✓ Project Manager authorized to engage the project team & resources

~The next session will cover the phases of the chartered project~
Business Requirements
Development Discussion

- Techniques for coordinating requirements development
  - Interviewing subject matter experts
  - Document current state process at high-level
  - Avoiding being too vague – these are scope statements
  - Avoid being too detailed – if you get into the “how” it’s done
  - Iterative documenting and sharing of requirements
  - Document future state process
Business Requirements
Project Management Life Cycle

The Story of CIS

“You keep using that word…..
…..I do not think it means what you think it means.”
Getting to CIS requirements…

- What is to be delivered?
  - Specific inclusions
  - Anything not enumerated is EXCLUDED

- What is going to be modified or replaced?
  - What is to be accomplished
  - Specific significant co-requirements

- Why is this worth the effort?
  - What problem is this intending to solve?
Business Requirements
Project Management Life Cycle

Collaborative Effort…

- Full partnership in development
  - Steering Committee / Working Groups

- Highly iterative process
  - Global acceptance

Integral to the success of the CIS project