Laying the Foundation for Project Success

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Duke University – At A Glance

Located in Durham, NC, Duke University is regarded as one of America’s leading research universities. Its 10 graduate and professional schools are among the leaders in their fields, and the university’s health system combines clinical care, research and education. Duke is the third largest private employer in North Carolina. Duke is also active internationally through Duke Kunshan University in China, the Duke-NUS Graduate Medical School in Singapore and numerous research and education programs across the globe.

Duke By The Numbers:

• Undergraduate students – 14,832
• Graduate students – 3,445
• Employees – 37,142
• Active alumni – 147,017
Three DukeCard Offices, One Goal

Our goal is to provide:
- A high-quality, single card system
- Convenient access to buildings and payment capabilities
- Courteous, timely and effective support
- Evolving use of advanced card industry technology

Annually, we produce over 38,000 cards:
- University Office – 20,857 cards
- Med Center Office - 16,995 cards
- The Link - 917 cards
Imagine Your Last Project…

- Stakeholders, management seemed unengaged
- Lack of shared expectations on project objectives and deliverables
- Lack of forward movement
- Scope creep!
- Nobody knows what success looks like!

It’s like herding cats.
What If Your Next Project…

- Everyone was engaged: management, stakeholders and project team
- Clear expectations set and agreed upon
- Team members know their role
- Deadlines are met
- Deliverables are understood
- Team execution is high
- Positive customer feedback received
Exploring the Project Lifecycle

Conception & Initiation
- Business Case
- High Level Requirements
- Constraints, Assumptions
- Preliminary Budget Estimate
- Project Charter
- Stakeholder Analysis

Definition & Planning
- Scope Definition
- Work Breakdown Structure
- Project Plan & Gantt Chart
- Project Budget
- Risk Analysis
- Communications Plan

Execution
- Direct & Manage project work
- Perform Q/A activities
- Manage Project Team
- Manage Project Risk
- Manage Communications
- Manage Stakeholder Engagement

Monitoring & Control
- Monitor & Control project work
- Perform Change Control
- Control Scope, Schedule, Cost, Quality, Risk
- Control Communications
- Control Stakeholder Engagement

Project Close
- Project Punch list
- Final Project Budget
- Final Project Report
- Archive Project Documents and Deliverables
- Celebrate Project Success

Every successful project goes through all five stages!
All Projects Need the Initiation Stage!

Large Project

Medium Project

Small Project
Project Initiation Stage: How You Begin Determines How You Will End

• Why are you doing this project?
• What are you doing?
• What are you **not** doing?
• Why should you do the project now?
• What business benefits will this give us?
• Who are the major stakeholders and what commitments do you need from them?
• How will you know when you’re done?

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<tr>
<th>Open Questions</th>
<th>Detailed Questions</th>
<th>Closed Questions</th>
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Shared, Measurable and Clear Expectations!
Stakeholders: Persons or Organizations actively involved in a project or those who are positively or negatively impacted by it.
I need 2 volunteers!
Two Moose Were Sitting On A Log…
The Most Important Thing a Project Manager Can Do

• Ask Questions
• Clarify Responses
• Listen to Understand, Not to Respond

80% to 90% of your time should be spent listening

10% to 20% of your time should be spent talking
Project Initiation Phase: PM Responsibilities

• Define project purpose
• Establish critical success factors
• Gather strategic and background information
• Determine high-level planning data
• Develop budget and schedule estimates
The Project Charter Document
The Project Charter Is Your Roadmap to Project Success!
What Happens When You Shortchange the Initiation Phase?
Let the Project Charter Be Your Guide
Keys to Successful Project Initiation

• Do your homework: do you understand why the project is being done, why now and the expected business benefits
• Develop a rapport with key stakeholders: set expectations and document commitments up front
• Communicate effectively: be clear about project roles and who is responsible for what
• Start the Charter document early: and evolve!
• Make Charter sign-off meaningful
Congratulations! Your Project Has Been Initiated!

Project Approval!

Project Kickoff Meeting
Project Management Resources

• Resources
  • Project Management Institute (www.pmi.org)
  • Project Management.com (https://www.projectmanagement.com)
  • Sensible Project Manager (www.sensiblepm.com)
  • PM Network publication (app available)
  • PM for the Masses podcast and blog (pmforthemasses.com)

• Online Software
  • Basecamp (https://basecamp.com)
  • Smartsheet (https://smartsheet.com)
  • Bitrix24 (https://www.bitrix24.com)
Project Management Resources

• Books
  • Project Management for the Unofficial Project Manager by Kory Kogon, Suzette Blakemore and James Woods
  • Project Management for Non-Project Managers by Jack Ferraro, PMP
  • Everyday Project Management by Peter Mulraney
  • Project Management for Beginners by Bryan Mathis
  • Project Management Lite by Juana Clark Craig, PMP
  • Project Management for You by Cesar Abeid, PMP
  • A Guide to the Project Management Body of Knowledge (PMBOK Guide), Fifth Edition