

THE GEORGE  
WASHINGTON  
UNIVERSITY  
WASHINGTON, DC

# Project Management *for Everyone*



# Contact Information

Project Management for Everyone

---

**Adam Donaldson, PMP**

Business Management & Analysis Group

System, Analytics & Insights Group

Phone: (202) 994-6867

Email: [adonald@gwu.edu](mailto:adonald@gwu.edu)

**BUSINESS MANAGEMENT  
& ANALYSIS GROUP (BMAG)**

FINANCE DIVISION



# Objectives

## Project Management for Everyone

---

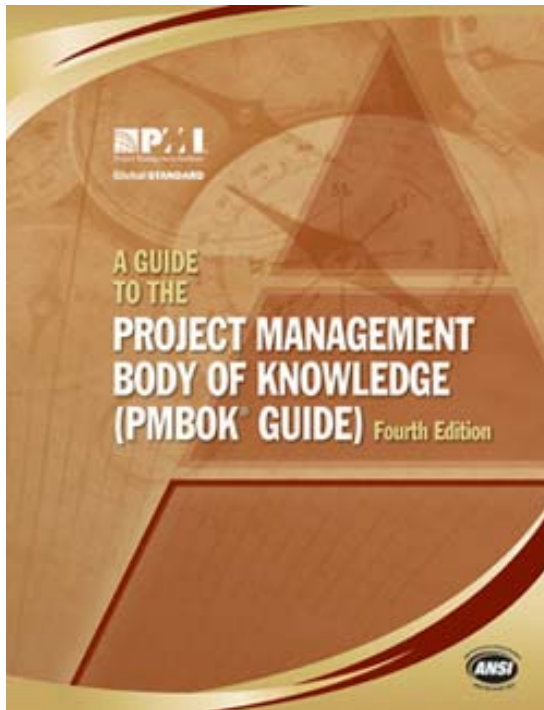
- ❑ Basic understanding of project management principles
- ❑ Share tools and techniques of formal project management that can be used in daily tasks and projects



# Project Management Institute

Project Management for Everyone

---



- ❑ PMI is an aggregation of best practices from thousands of professional project managers
- ❑ Principles in this session are based on PMI methodologies, there are other methodologies
- ❑ Organizations typically use these as a basis for developing custom project management processes



[www.pmi.org](http://www.pmi.org)

# GW MS in Project Management

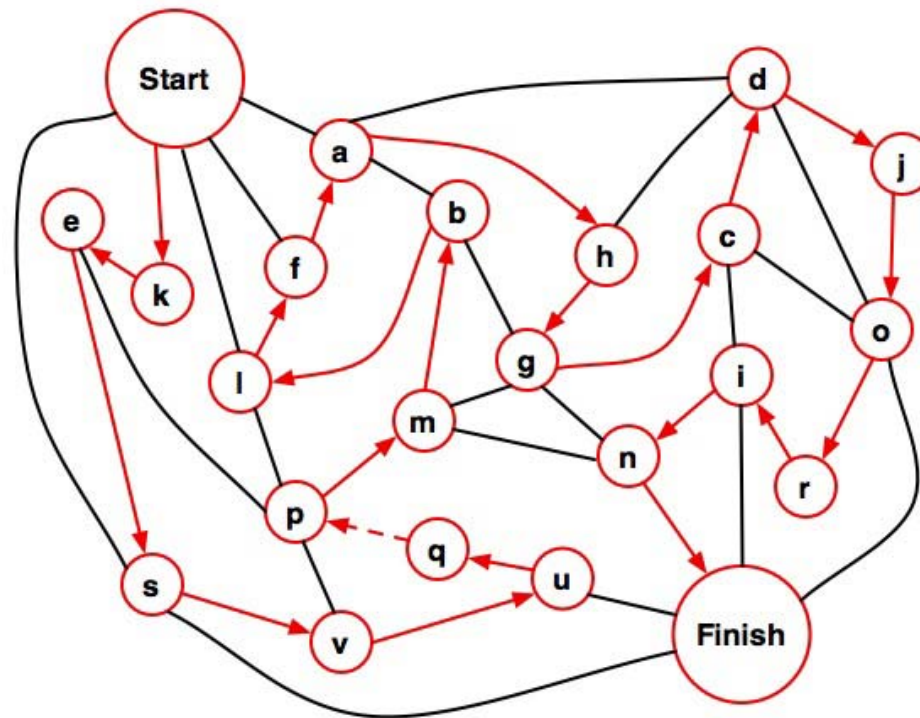
Project Management for Everyone



[business.gwu.edu/programs/specialized-masters/mspm/](https://business.gwu.edu/programs/specialized-masters/mspm/)

# Project Management Principles

Project Management for Everyone



# Project Management for Everyone

Temporary / Not Ongoing

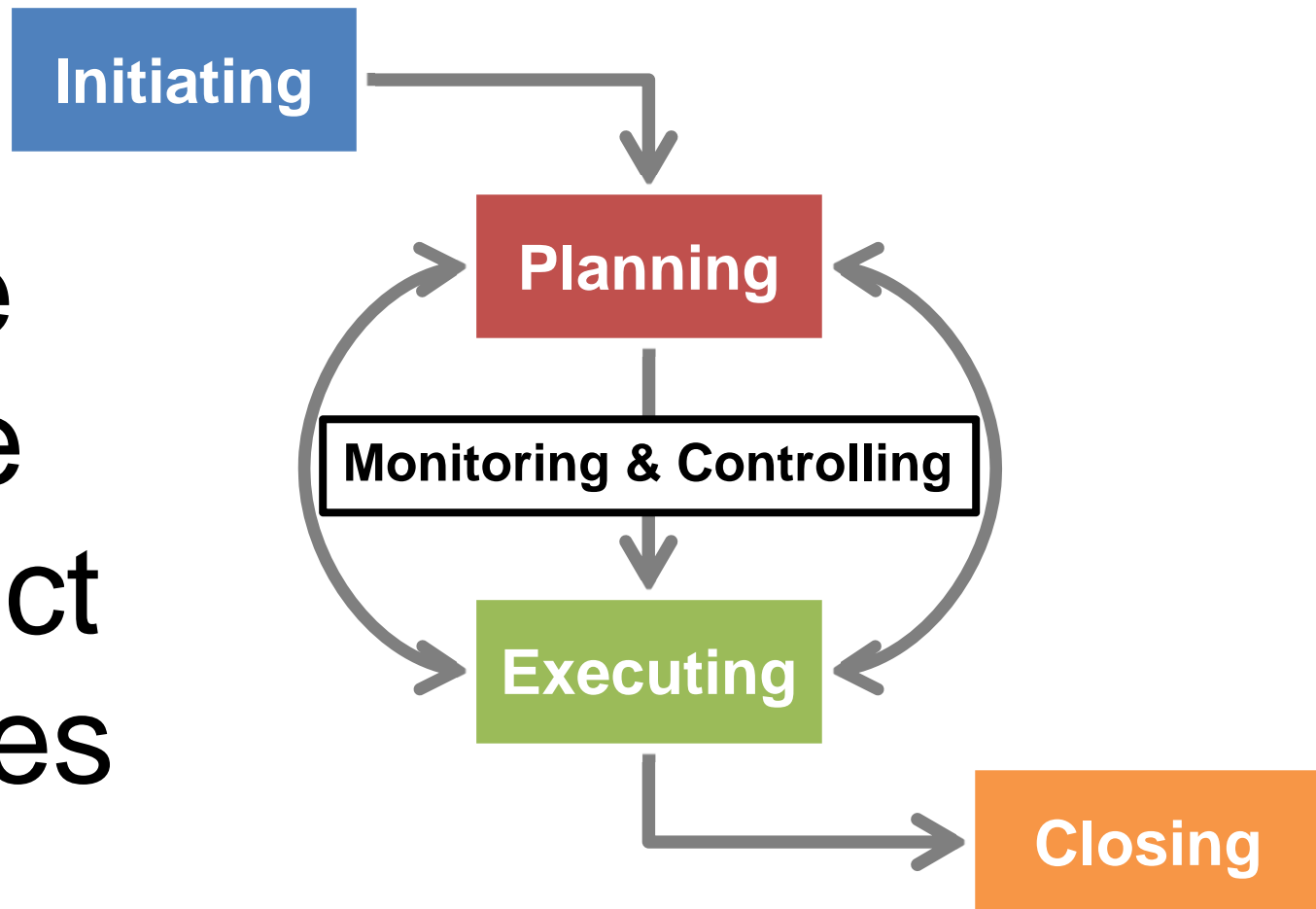
- Unique

- [illegible]

# Project Life Cycle

Project Management for Everyone

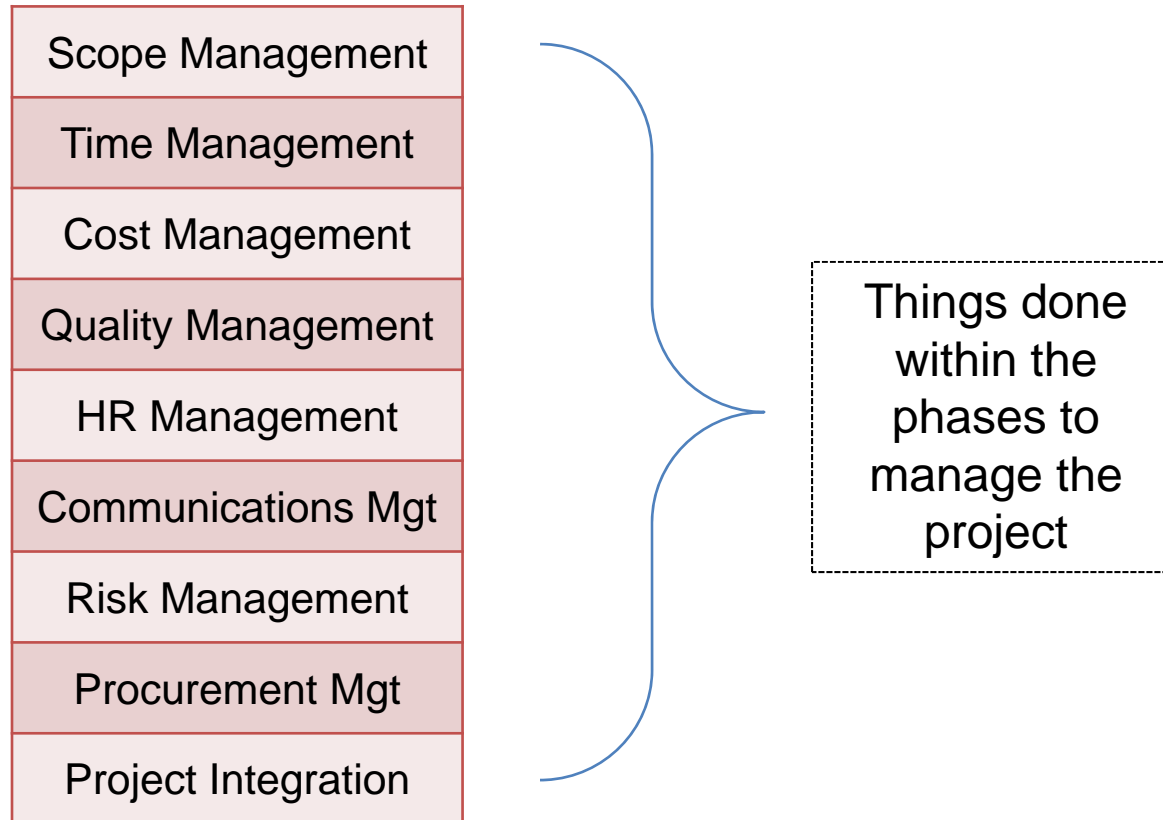
The  
Five  
Project  
Phases



# Project Management Functions

Project Management for Everyone

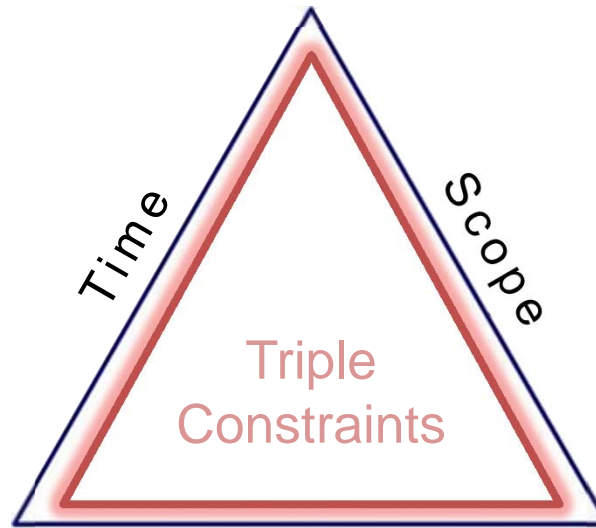
---



~ PMI refers to these as *Knowledge Areas* ~

# Triple Constraints

Project Management for Everyone



Resources



- ✓ Dates
- ✓ Deliverables
- ✓ Dollars

~ Managing these is the primary responsibility of the PM ~

# PM in Practical Terms

Project Management for Everyone

---

## **Define**

Clarify the request  
and objectives

Initiating

## **Plan**

Develop the  
specific approach

Planning

## **Manage**

Task, action,  
communication &  
resource management

Monitoring &  
Controlling

Executing

## **Review**

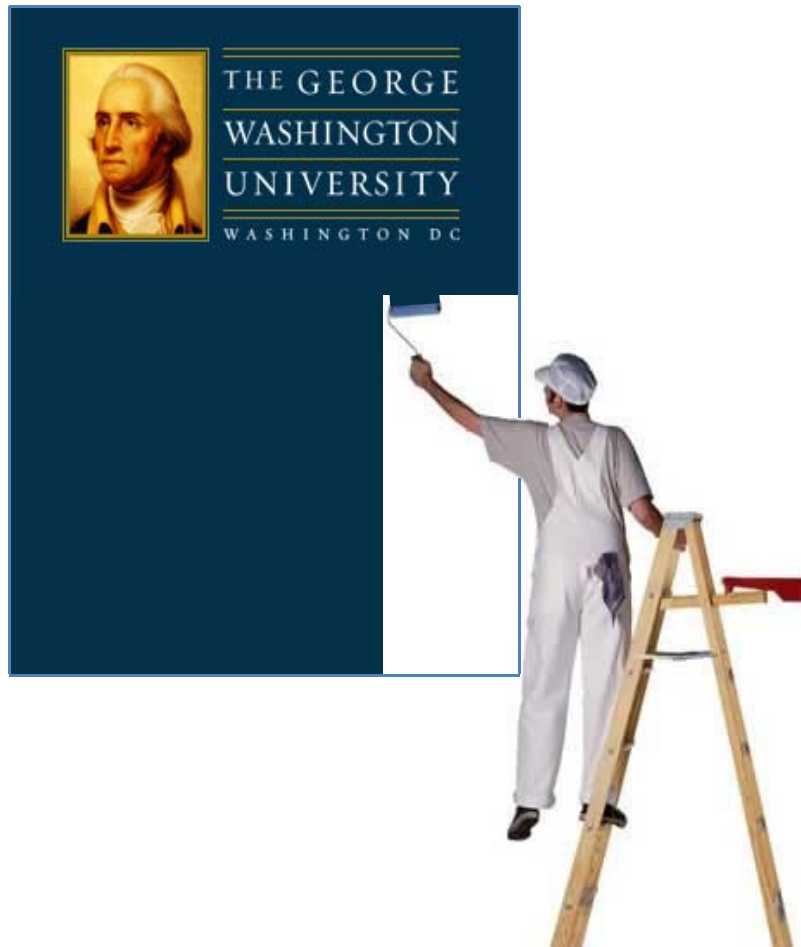
Were expectations  
met?

Closing

# Day to Day Use of PM

Project Management for Everyone

---



*What are some struggles often experienced in projects?*

# Define

Initiating

## Project Management for Everyone

---

- ❑ Clarify the request / initiative
- ❑ Identify stakeholders
- ❑ Define the requirements



# Define - Clarification

## Project Management for Everyone

### PM Tool

#### Project Charter

The screenshot shows a Project Charter form from The George Washington University PMLC (Project Management Life Cycle). The form includes fields for Prepared By, Version, Date, Project Owner, and Process Initiator. It also has a STATUS section with checkboxes for Draft, Pending for Document Approval, Approved, and Unapproved.

Defines high-level scope, exclusions, objectives, milestones & timeline

### Everyday Tool

#### Email / Memo

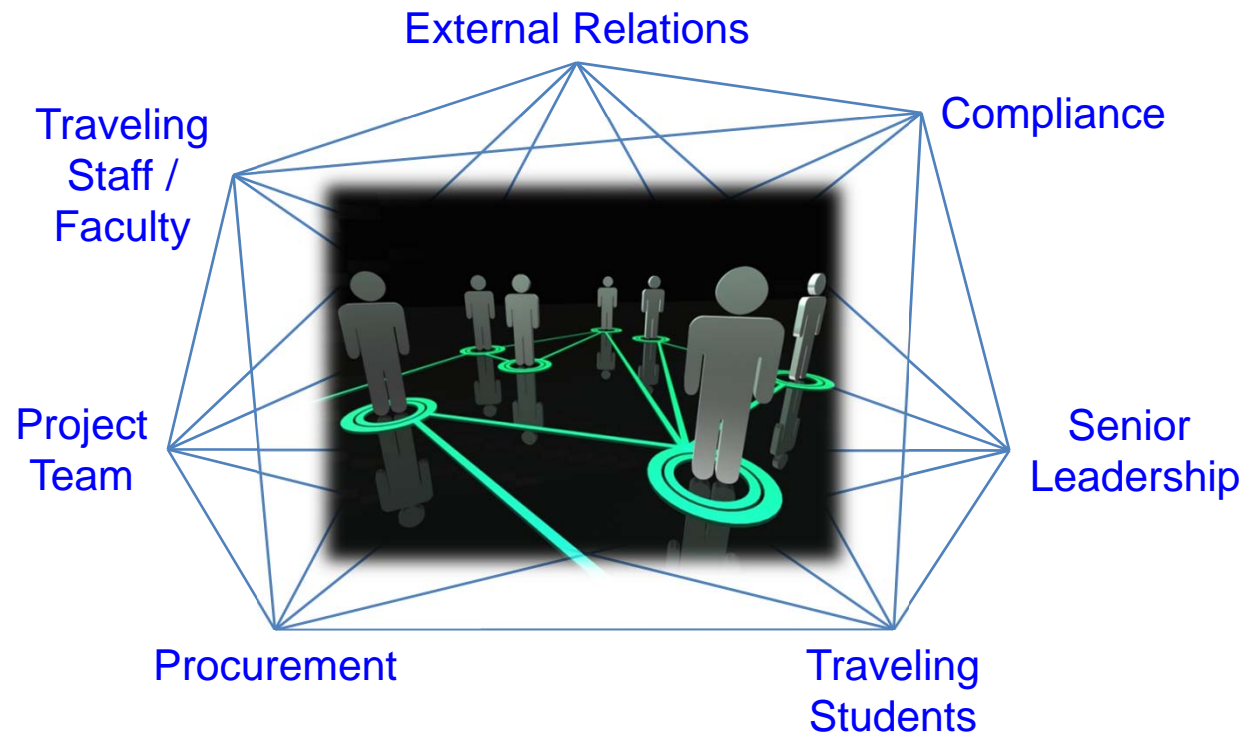
The screenshot shows an email client interface with fields for From, To, Subject, and CC. The email is being composed in the body of the message.

- Document objectives
- Send to requester to validate
- Writing down helps clarify
- Get agreement!!

# Define - Identify Stakeholders

## Project Management for Everyone

Project Stakeholder { *People or groups positively or negatively affected by the project outcome.*



*Stakeholders may or may not exert direct influence over the project*

# Define - Identify Stakeholders

Project Management for Everyone

PM Tool

Everyday Tool

## Stakeholder Matrix

Name	Title	Department / Group	Category	Contact	Impact (H/M/L)	Influence (H/M/L)
Adam Donaldson	Manager	Business Management & Analysis Group	Project Team	202-994-6867 adonald@gwu.edu	H	M
Sally Doe	Executive Director	Procurement	Project Owner	703-555-1212 sally_doe@gwu.edu	M	M
John Doe	Travel Manager	Procurement	Subject Matter Expert	202-555-1212 john_doe@gwu.edu	H	M
Jane Doe	Compliance Manager	Compliance	Subject Matter Expert	202-555-1213 jane_doe@gwu.edu	H	L
Bill Doe	Director	School Budget Officers	Stakeholder	202-555-1214 bill_doe@gwu.edu	M	L

- Identify and track key stakeholders
- Determine importance in order to gauge how to manage
- Ensure thoroughness of communications planning

# Define - Requirements

## Project Management for Everyone

### PM Tool

#### Requirements Document

THE GEORGE WASHINGTON UNIVERSITY  
PMLC  
Project Management Life Cycle

**The George Washington University**  
[Project Name]  
**Business Requirements Document**

Prepared By: [Name(s) of Proposer(s)]  
Version: [Version Number #X]  
Date: [Date]  
Project Owner: [Name & Title of Project Owner]  
[Department]  
Project Manager: [Name of Project Manager]  
[Department]  
[Contact Information]

STATE: ☒ Draft  
☐ Pending for Document Approval  
☐ Approved  
☐ Unapproved

Documents the “what” of the initiative / task and breaks into individually deliverable items

### Everyday Tool

#### Requirements List

#	Requirement Name / Description	Category
1	Travel policy updates shall specify preferred rental car vendors	Travel Policy
2	Travel policy update shall clarify rental car insurance policies	Travel Policy
3	Travel policy shall revise and clarify business class travel rules for international flights	Travel Policy
4	Entertainment policy shall include a per diem and clarify amounts	Entertainment Policy
5	Entertainment policy shall specify exclusions to per diem	Entertainment Policy

- List the “what” items required in the final solution
- Iterative process often requiring multiple interviews
- Critical to defining the solution

# Define

Initiating

## Project Management for Everyone

---

- ☑ Clarification Memo
- ☑ Stakeholder Matrix
- ☑ Requirements List



# Plan

Planning

## Project Management for Everyone

---

- ❑ Organize and plan
- ❑ Determine tasks to be done
- ❑ Create a schedule
- ❑ Plan communications



# Plan – Project Management Plan

Project Management for Everyone

PM Tool

Project Management Plan

The cover page of the Project Management Plan (PMLC) for The George Washington University. It features the university's logo and the title 'PMLC Project Management Life Cycle'. Below this, it reads 'The George Washington University [Project Name] Project Definition Document'. The page includes fields for 'Prepared By:', 'Version:', 'Date:', 'Project Owner:', and 'Project Manager:', each followed by a placeholder in brackets. At the bottom, there is a 'STATUS:' section with three checkboxes: 'Draft' (checked), 'Pending for Document Approval', and 'Approved'.

Establishes plan for planning, execution, monitoring & closing, including all subsidiary plans

Everyday Tool

Project Workbook

A screenshot of a Microsoft Excel spreadsheet titled 'Example Project Workbook'. The spreadsheet has a table with four columns: '#', 'Requirement Name / Description', 'Category', and 'Benefit'. The table contains four rows of data. The first row is a header. The second row describes the project management process. The third row describes the breakdown of the process into sub-phases. The fourth row describes the requirement for a phase review. The fifth row describes the requirement for a single owner responsible for deliverables. The spreadsheet also shows the Excel ribbon with tabs for Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, and Acrobat.

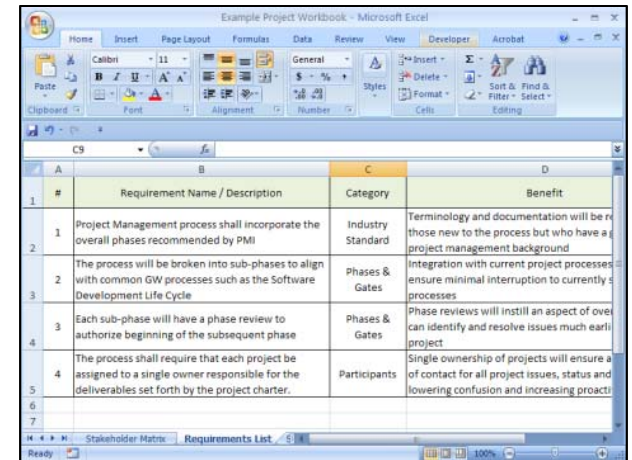
#	Requirement Name / Description	Category	Benefit
1	Project Management process shall incorporate the overall phases recommended by PMI	Industry Standard	Terminology and documentation will be re those new to the process but who have a g project management background
2	The process will be broken into sub-phases to align with common GW processes such as the Software Development Life Cycle	Phases & Gates	Integration with current project processes ensure minimal interruption to currently s processes
3	Each sub-phase will have a phase review to authorize beginning of the subsequent phase	Phases & Gates	Phase reviews will instill an aspect of over can identify and resolve issues much earli project
4	The process shall require that each project be assigned to a single owner responsible for the deliverables set forth by the project charter.	Participants	Single ownership of projects will ensure a of contact for all project issues, status and lowering confusion and increasing proacti



# “Project” Workbook

## Project Management for Everyone

- Include all “project” information
  - Scope / Objectives
  - Stakeholders / Contacts
  - Requirements
  - Schedule, Milestones & Deliverables
  - Action Items and Issues
- Central location for all project info
  - Excel workbook or other similar tool
  - Local / Shared Folder
- Living document
- Serves as a template / historical artifact for similar future endeavors



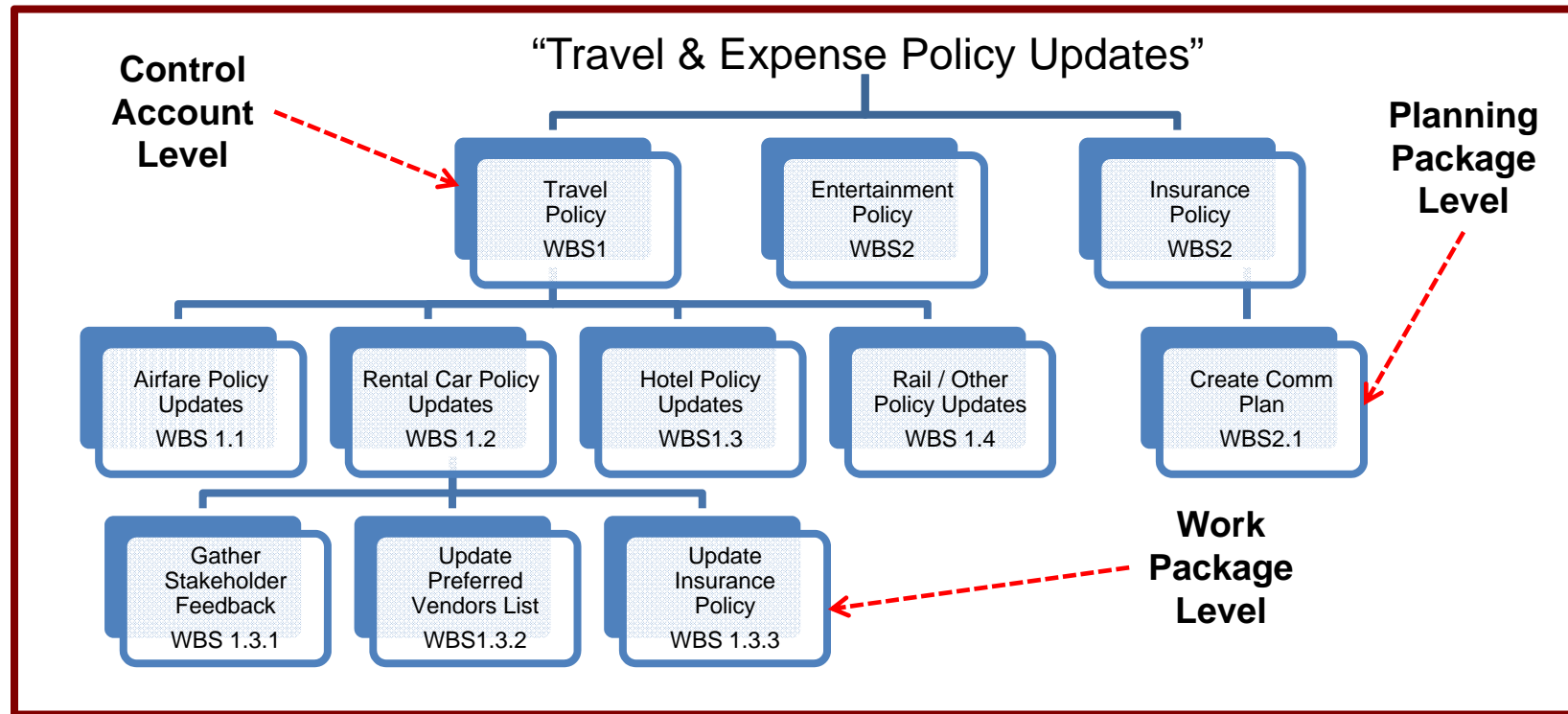
#	Requirement Name / Description	Category	Benefit
1	Project Management process shall incorporate the overall phases recommended by PMI	Industry Standard	Terminology and documentation will be re those new to the process but who have a project management background
2	The process will be broken into sub-phases to align with common GW processes such as the Software Development Life Cycle	Phases & Gates	Integration with current project processes ensure minimal interruption to currently processes
3	Each sub-phase will have a phase review to authorize beginning of the subsequent phase	Phases & Gates	Phase reviews will instill an aspect of over can identify and resolve issues much early project
4	The process shall require that each project be assigned to a single owner responsible for the deliverables set forth by the project charter.	Participants	Single ownership of projects will ensure a of contact for all project issues, status and lowering confusion and increasing proacti

# Plan – Task Identification

Project Management for Everyone

PM Tool

Everyday Tool



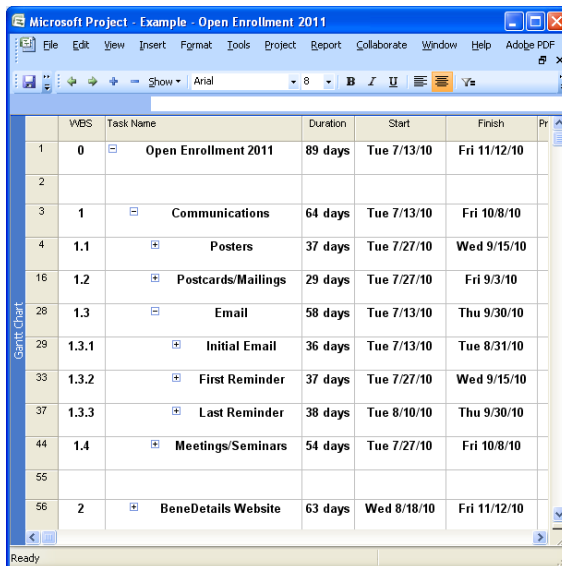
- Breaks deliverables into manageable work packages
- Ensures we don't forget or omit important tasks

# Plan – Schedule

## Project Management for Everyone

PM Tool

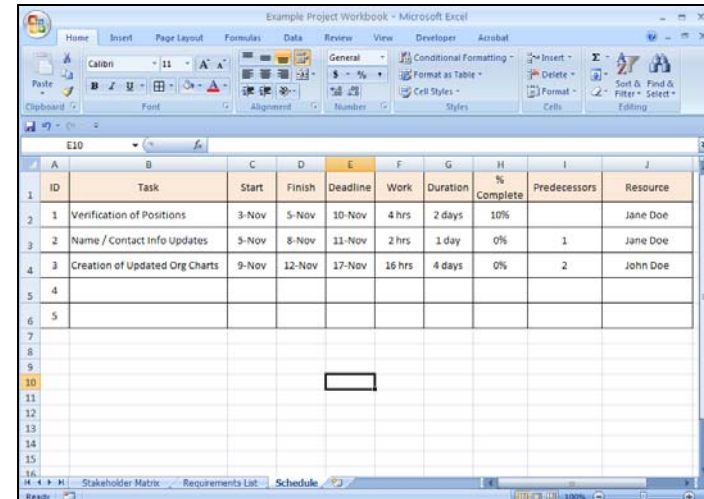
Formal Project Schedule



	WBS	Task Name	Duration	Start	Finish
1	0	Open Enrollment 2011	89 days	Tue 7/13/10	Fri 11/12/10
3	1	Communications	64 days	Tue 7/13/10	Fri 11/8/10
4	1.1	Posters	37 days	Tue 7/27/10	Wed 9/15/10
16	1.2	Postcards/Mailings	29 days	Tue 7/27/10	Fri 9/3/10
28	1.3	Email	58 days	Tue 7/13/10	Thu 9/30/10
29	1.3.1	Initial Email	36 days	Tue 7/13/10	Tue 8/31/10
33	1.3.2	First Reminder	37 days	Tue 7/27/10	Wed 9/15/10
37	1.3.3	Last Reminder	38 days	Tue 8/10/10	Thu 9/30/10
44	1.4	Meetings/Seminars	54 days	Tue 7/27/10	Fri 10/8/10
56	2	BeneDetails Website	63 days	Wed 8/18/10	Fri 11/12/10

Everyday Tool

Task List / Schedule



ID	Task	Start	Finish	Deadline	Work	Duration	% Complete	Predecessors	Resource
1	Verification of Positions	3-Nov	5-Nov	10-Nov	4 hrs	2 days	10%		Jane Doe
2	Name / Contact Info Updates	3-Nov	8-Nov	11-Nov	2 hrs	1 day	0%	1	Jane Doe
3	Creation of updated Org Charts	9-Nov	12-Nov	17-Nov	16 hrs	4 days	0%	2	John Doe
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									

Sequences & defines project tasks  
and monitors status of project against  
milestones / baselines



# Plan – Schedule

## Project Management for Everyone

### Task List / Schedule

ID	Task	Start	Finish	Deadline	Work	Duration	% Cmpl	Predecessors	Resource
	<b>Rental Car Policy Updates</b>	<b>3-Jun</b>	<b>5-Jun</b>	-	<b>30 hrs</b>	<b>14 days</b>	<b>7%</b>		
1	Gather Stakeholder Feedback	3-Jun	7-Jun	-	8 hrs	5 days	20%		John Doe
2	Update Preferred Vendor Information	10-Jun	14-Jun	-	16 hrs	5 days	0%	1	John Doe
3	Update Rental Car Insurance Instructions / Policy	17-Jun	18-Jun	-	2 hrs	2 days	0%	2	Sally Doe
4	Dept Approval of Rental Car Section	19-Jun	20-Jun	-	4 hrs	2 days	0%	3	Sally Doe
5	<b>Rental Car Section Updated Ready for Approval Process</b>	<b>21-Jun</b>	<b>21-Jun</b>	<b>21-Jun</b>	-	-	0%	4	

- Excel or other common tool
- Turn WBS work packages into tasks
- Clearly identify major milestones
- Identify dependencies – one task which relies on another

# Plan – Communications Matrix

Project Management for Everyone

PM Tool

Communications Plan

The screenshot shows a template for a Project Communication Plan. At the top left is the George Washington University logo. To the right is the PMLC (Project Management Life Cycle) logo. The title is "The George Washington University [Project Name] Project Communication Plan". Below the title are fields for "Prepared By:", "Version:", "Date:", "Project Owner:", and "Project Manager:", each followed by a bracketed placeholder for the respective information.

Documents the detailed plan  
for communicating with all  
stakeholders

Everyday Tool

Communications Matrix

The screenshot shows a Microsoft Excel spreadsheet titled "Example Project Workbook - Microsoft Excel". The spreadsheet contains a table with the following data:

#	Communication	Medium	Delivery Date	Frequency	Audience	Reviewer	Owner	Status
1	Notification of department heads of efforts to update web	Email	5-Nov	One-Time	Directors in Finance	Jane Doe	John Doe	Open
2	Solicitation to entire department for content	Email	8-Nov	One-Time	Finance	Jane Doe	John Doe	Open
3	Communicate changes to UWS / External Relations	Meeting	12-Nov	Bi-Weekly	IT, External Relations	N/A	Adam Donaldson	Open
4	Department web content update review	Meeting	8-Nov	Weekly	Finance	N/A	Adam Donaldson	Open
5	Status Report	Memo	9-Nov	Weekly	Finance SAVP	John Smith	Jane Doe	Open



# Plan – Communications Matrix

## Project Management for Everyone

### Communications Matrix

#	Communication	Medium	Delivery Date	Frequency	Audience	Reviewer	Owner	Status
1	Project Kickoff w/ Stakeholders	Meeting	1-Jun	Weekly	Finance Directors Department Heads	N/A	Adam Donaldson	Open
2	Notification of Policy Update Efforts	Email	15-Jun	One Time	Faculty & Staff via Infomail	Jane Doe	John Doe	Open
3	Focus Groups for Update Gathering	Meeting	22-Jun	One Time	Finance Directors / Departments	N/A	John Doe	Open
4	Notification of New Policy When Effetive	Email	1-Jul	One Time	Finance	N/A	John Doe	Open
5	Status Report	Memo	1-Jun through 1 Jul	Weekly	Executive VP & Treasurer	Jane Doe	Adam Donaldson	Open

- Target communications towards stakeholders identified
- Consider both “internal” and “external” communications
- One of the most vital efforts in any project

# Plan

Planning

## Project Management for Everyone

---

- ☑ Project Workbook
- ☑ Task Identification / WBS
- ☑ Task List / Schedule
- ☑ Communications Matrix



# Manage

Project Management for Everyone

Executing

Monitoring

- ❑ Executing schedule tasks
- ❑ Managing action items & issues
- ❑ Report status



# Manage – Actions & Issues

Project Management for Everyone

PM Tool

Everyday Tool

## Action & Issues Register

Action #	Priority	Description	Owner	Open Date	Next Update Date	Status	Close Date
4	Low	Finish Kickoff Presentation and schedule the kickoff meeting	Adam	5/25/15	5/30/15	Closed	
5	Med	Contact Rental Car vendor re: Insurance. Get Rental Car vendor contact info from John	Bill	6/1/15	6/5/15	Open	
6	Med	Gather language for "preferred choice" airline provider for international flight section of policy	Dave	6/1/15	6/9/12	Open	
7	High	Coordinate schedules for the policy approval meetings	Adam	6/1/15	6/12/12	Open	
8	Med	Notify Compliance that we will be requesting approvals after 6/21. Need to get process started.	Adam	6/7/15	6/14/12	Open	
9	Med	Onboard the new Procurement Manager on the project.	Sally	6/9/15	6/16/15	Open	

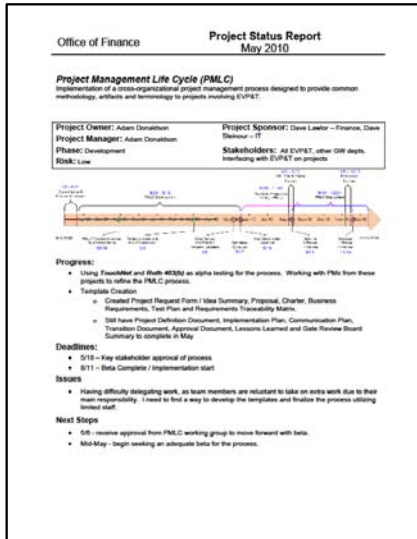
- Log and track all actions and issues – ensures accountability
- Tasks are scheduled – Action Items “pop up”

# Communicate – Status Report

## Project Management for Everyone

PM Tool

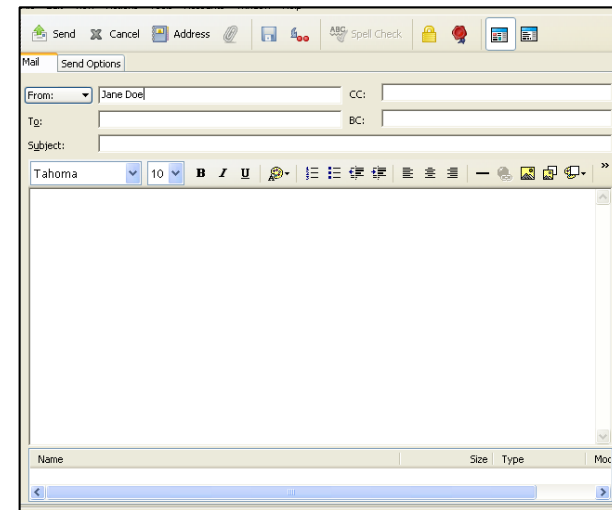
Project Status Report



Provides succinct information  
conveying timelines, progress,  
issues & next steps

Everyday Tool

Email / Memo



# Communicate – Status Report

## Project Management for Everyone

**Office of Finance**

**Project Status Report  
May 2010**

---

**Project Management Life Cycle (PMLC)**  
Implementation of a cross-organizational project management process designed to provide common methodology, artifacts and terminology to projects involving EVP&T.

<b>Project Owner:</b> Adam Donaldson	<b>Project Sponsor:</b> Dave Lawlor – Finance, Dave Steinour – IT
<b>Project Manager:</b> Adam Donaldson	
<b>Phase:</b> Development	<b>Stakeholders:</b> All EVP&T, other GW depts. Interfacing with EVP&T on projects
<b>Risk:</b> Low	

The timeline chart illustrates the PMLC process from May 2009 to October 2010. Key milestones include:
 

- May 09:** PMLC Process Approved by Working Group
- Aug 09:** Beta Complete / Implementation start
- Oct 09:** PMLC Process Approved by Working Group
- Dec 09:** Beta Complete / Implementation start
- Feb 10:** Beta Complete / Implementation start
- Apr 10:** Beta Complete / Implementation start
- Jun 10:** Beta Complete / Implementation start
- Aug 10:** Beta Complete / Implementation start
- Oct 10:** Beta Complete / Implementation start

**Progress:**

- Using **TouchNet** and **Roth 403(b)** as alpha testing for the process. Working with PMs from these projects to refine the PMLC process.
- Template Creation
  - Created Project Request Form / Idea Summary, Proposal, Charter, Business Requirements, Test Plan and Requirements Traceability Matrix.
  - Still have Project Definition Document, Implementation Plan, Communication Plan, Transition Document, Approval Document, Lessons Learned and Gate Review Board Summary to complete in May

**Deadlines:**

- 5/18 – Key stakeholder approval of process
- 8/11 – Beta Complete / Implementation start

**Issues**

- Having difficulty delegating work, as team members are reluctant to take on extra work due to their main responsibility. I need to find a way to develop the templates and finalize the process utilizing limited staff.

**Next Steps**

- 5/6 - receive approval from PMLC working group to move forward with beta.
- Mid-May - begin seeking an adequate beta for the process.

- Description
- Timeline
- Progress
- Deadlines
- Issues
- Next Steps

# Manage

Project Management for Everyone

Executing

Monitoring

- ☑ Schedule & Project Workbook
- ☑ Action & Issues Register
- ☑ Status Report



# Review

Closing

## Project Management for Everyone

---

- ❑ Discuss what went right & wrong
- ❑ Hold final review

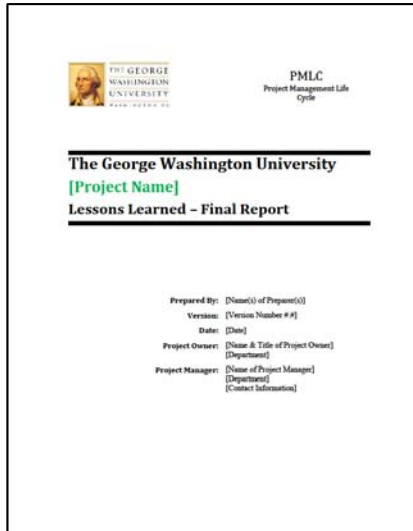


# Review – Lessons Learned

## Project Management for Everyone

### PM Tool

#### Lessons Learned Document

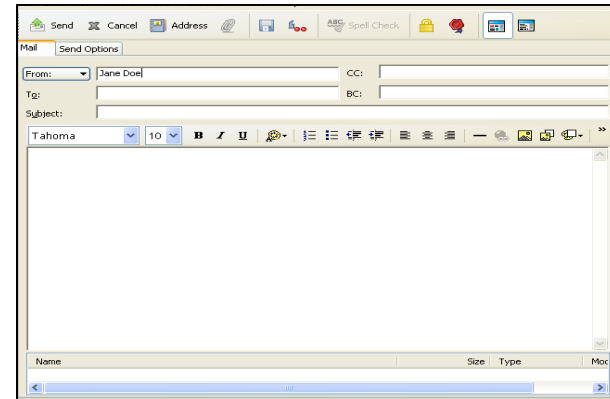


The cover page of a Lessons Learned document from The George Washington University PMLC (Project Management Life Cycle). It features the university logo and the title "Lessons Learned – Final Report". Below the title, there are fields for "Prepared By:", "Version:", "Date:", "Project Owner:", and "Project Manager:", each followed by a placeholder in brackets indicating where to enter the relevant information.

Formally documents lessons learned throughout the project by phase

### Everyday Tool

#### Email / Memo



A screenshot of an email client interface, likely Microsoft Outlook. The window shows the "Mail" tab with "Send Options" selected. The "From:" field is filled with "Jane Doe". The "To:" and "Subject:" fields are empty. The "Cc:" and "Bc:" fields are also empty. The "Tahoma" font is selected, and the font size is set to 10. The main body of the email is empty. At the bottom, there is a table with columns for "Name", "Size", "Type", and "Mod".

- Gather key participants to discuss lessons learned
- Capture important lessons which could help others engaged in similar activity

# Review – Final Review

## Project Management for Everyone

### PM Tool

#### Project Approval Document

The George Washington University  
[Project Name]  
Project Transition Document

Prepared By: [Name(s) of Preparer(s)]  
Version: [Version Number #]  
Date: [Date]  
Project Owner: [Name & Title of Project Owner]  
[Department]  
Project Manager: [Name of Project Manager]  
[Department]  
[Contact Information]

STATUS: ☒ Draft  
☐ Ready for Document Approval  
☐ Approved  
☐ Unapproved

Documents formal signature  
approval of the project

### Everyday Tool

#### Review of Project Workbook

Example Project Workbook - Microsoft Excel

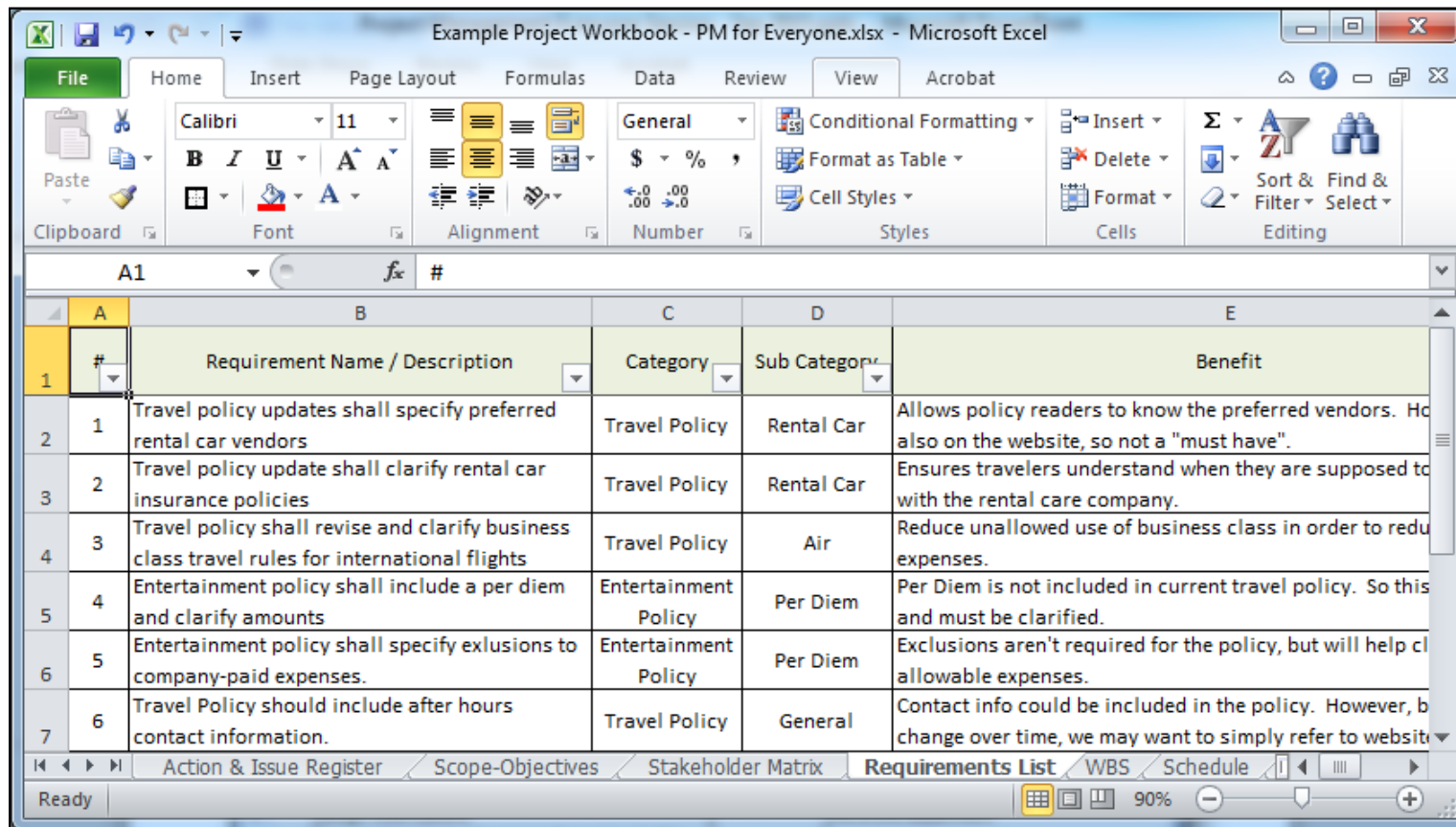
News and home page content updates will include information and occurrences

A	B	C	D
#	Requirement Name / Description	Category	Benefit
1	Department web page modifications shall conform to design standards set forth by External Relations	Design	Overall layout and color scheme will be consistent with GW standards and will continue to be easily updated
2	News and home page content updates will include information and occurrences which have happened within the previous 6 months	Content	Information contained on the front page needs to be timely and current in order to encourage users to continually return
3	Department managers will approve all content and design modifications	Governance	Ensures all web site updates have been agreed-upon by the entire department
4	Organization chart and contact information shall be validated and made current as of the date of publishing to the web site.	Content	Provides the most current organization information possible to users of the web site
5	Time and date of the last update shall be displayed to the users	Content	Allows users to understand the currency of the information being presented



# Review – Final Review

## Project Management for Everyone



	A	B	C	D	E
	#	Requirement Name / Description	Category	Sub Category	Benefit
1	1	Travel policy updates shall specify preferred rental car vendors	Travel Policy	Rental Car	Allows policy readers to know the preferred vendors. He also on the website, so not a "must have".
2	2	Travel policy update shall clarify rental car insurance policies	Travel Policy	Rental Car	Ensures travelers understand when they are supposed to with the rental care company.
3	3	Travel policy shall revise and clarify business class travel rules for international flights	Travel Policy	Air	Reduce unallowed use of business class in order to redu expenses.
4	4	Entertainment policy shall include a per diem and clarify amounts	Entertainment Policy	Per Diem	Per Diem is not included in current travel policy. So this and must be clarified.
5	5	Entertainment policy shall specify exlusions to company-paid expenses.	Entertainment Policy	Per Diem	Exclusions aren't required for the policy, but will help cl allowable expenses.
6	6	Travel Policy should include after hours contact information.	Travel Policy	General	Contact info could be included in the policy. However, b change over time, we may want to simply refer to website

- Review objectives & requirements
- Review lessons learned
- Discuss plan to close open actions

# Review

Closing

## Project Management for Everyone

---

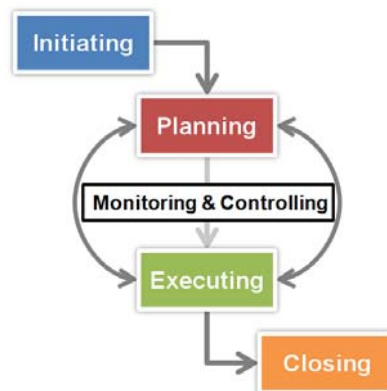
- ☑ Lessons Learned
- ☑ Project Workbook



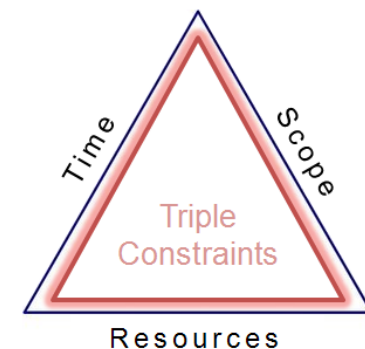
# Summary

## Project Management for Everyone

- ✓ Project Management Concepts
  - Definition of a project
  - Project Lifecycle
  - Project Management Functions
  - Triple Constraints



Scope Management
Time Management
Cost Management
Quality Management
HR Management
Communications Mgt
Risk Management
Procurement Mgt
Project Integration



# Summary

## Project Management for Everyone

---

### *Project tools for everyday tasks & projects*

- Define

Initiating

- Clarification Memo
- Stakeholder Matrix
- Requirements List

- Plan

Planning

- Project Workbook
- Task Identification / WBS
- Schedule
- Communications Matrix

- Manage

Executing

Monitoring & Controlling

- Schedule / Proj Workbook
- Actions & Issues Register
- Status Report

- Review

Closing

- Lessons Learned Document
- Project Workbook

# Questions

Project Management for Everyone

---



# Thank You!!!

## Project Management for Everyone

---

**Adam Donaldson, PMP**

Business Management & Analysis Group

Systems, Analytics & Insights Group

Phone: (202) 994-6867

Email: [adonald@gwu.edu](mailto:adonald@gwu.edu)