Tech Talks

December 18, 2019

Introduction to Project Management
Amy Keach, PMP, EMBA
Announcements: A great App & Please complete Evaluation forms

LiveSafe App

Download the free App (available on iPhone and Androids only)
- Download LiveSafe for iPhone
- Download LiveSafe for ANDROID

What is it?
LiveSafe is an app that gives students, staff, and faculty on campus an effective way to communicate with the police (VPD) via a mobile security device to provide the VPD with accurate information about yourself and your GPS location. Your location and information can be shared with VPD when you use the Emergency Report Tips button within the app.

Tech Talks Evaluation Form

Today’s Date: ___________________________ Topic: ___________________________

Speaker: ___________________________

Your input is very important. We want to insure we are presenting relevant and meaningful content in a positive way. Our speakers want your feedback to help them improve their skills. We are always looking for topic ideas and more speakers.

Describe this presentation in one word: ___________________________

Describe this presentation in one sentence: ___________________________

Evaluate the Topic:
List the strengths of this presentation.

Would you like to learn about this topic?

Yes ☐ No ☐
Announcements: Unconscious Bias Training

IT Staff Development

Yale University
Training and Certification

IT Staff Development

IT Community

<table>
<thead>
<tr>
<th>Course/Form Title</th>
<th>Next Class</th>
<th>Start Time</th>
<th>Seats Available</th>
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<td>IT New Employee Orientation</td>
<td>Contact course owner</td>
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<td>Unconscious Bias Foundations</td>
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IT InfoSec Topics

<table>
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## Announcements: Tech Talks: Jan – Mar 2020

<table>
<thead>
<tr>
<th>Date</th>
<th>Title</th>
<th>Presenter(s)</th>
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<tr>
<td><strong>January 2020</strong></td>
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<tr>
<td>2020-JAN-23</td>
<td>InfoSec Chats with Paul Rivers</td>
<td>Paul Rivers, Jon Sobel, Beth McKinley</td>
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<td>Access Mgt Improvement &amp; DUO Mulit-factor Authentication</td>
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<td>2020-JAN-29</td>
<td>Software Defined Network</td>
<td>Tim Sheets</td>
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<td><strong>February 2020</strong></td>
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<td>2020-FEB-12</td>
<td>AWS@Yale</td>
<td>Camden Fisher, Sandy Bouton</td>
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<td>2020-FEB-20</td>
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<td>2020-FEB-26</td>
<td>Taste of of Enterprise Integration &amp; Applications at Yale</td>
<td>Darrell Cook, Donal Cheung</td>
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<td><strong>March 2020</strong></td>
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<td>2020-MAR-04</td>
<td>Modern Log Analysis Using Elastic Stack</td>
<td>Sasha Mangs, Greg Mackinnon</td>
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<tr>
<td>2020-MAR-18</td>
<td>Writing Optimal SQL</td>
<td>Amit Poddar</td>
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Not a PMBOK master? Chances are either you’ve found yourself leading a project, asked to lead a project, or will in the future. No matter the case, this is the “Tech Talk” for you! Amy teaches project management basics at the University of New Haven and is bringing an IT-focused version of her class to us. She will walk us through: What a project is? Are you working on a project or a task? She will break a project into; Manageable parts, Task accountability, & Project communication. This session provides the tools to get your project over the finish line.
What in the World is a Project?
The Project Management Institute (PMI) says...

“...a temporary endeavor undertaken to create a unique product, service, or result.”

Defined beginning

Defined end

Defined scope

Defined resources

Project management = the application of skills, knowledge, and tools to accomplish the project's requirements
In the Real World, a Project is...

...an initiative undertaken to accomplish a specific goal

Fairly solid start date

Targeted end or “launch” date

Requirements that start solid but inevitably change as the project progresses
Project Examples

- Creating a New Blog Template
- Upgrade to CMS Platform
- Redesign of Website
- Implementing a New Email System
The Basic Structure of a Project
Project Phases

- Initiate
- Plan
- Execute
- Monitor & Control
- Close
1. Initiate

- Generate ideas
- Analyze project paths / possibilities
- Brainstorm components (WBS)
- Consider stakeholders
2. Plan

Create the timeline → Define and assign project components

Identify stakeholders, gain buy-in → Project kickoff
3. Execute

Assign tasks to the team → Daily stand-ups → Weekly project reviews

Status reporting to board

Culminates in launch of product or service
4. Monitor & Control

Monitor and review performance

Adjust as needed – change management
5. Close

EvA analysis

- Did we come in on, over, or under budget?
- What factors influenced the result?
- What could we have done to counteract? *(if applicable)*

Post-mortem review

- What worked?
- What didn’t work?
- What will we do differently (or repeat) next time to ensure success?
Tools of the Trade
Key Tools for Any Project

- Team List with Roles (RACI)
- SOW (Scope of Work)
- WBS
- Project Plan
- Status Report
- Change/Decision Control Log
Team List with Roles

- Who's on the team
- Who is responsible for what deliverables
- Who are the decision makers
SOW: Define Deliverables

IN SCOPE

NOT IN SCOPE
Work Breakdown Structure

Identify
- Break components into individual tasks to complete

Group
- Arrange components into logical groups

Order
- Arrange the groups in executional order
  - Note interdependencies between tasks
Project Plan

01 Create schedule based on WBS
  • Team and individual ownership mixed

02 Assign tasks to team
  • Clear individual vs team responsibility

03 Use a tool to create workflows
  • Efficient communication and process maintenance
Visual Task Management

Project phases have swimlanes

Tasks have cards that can be updated and moved between swimlanes

Cards can be assigned – and users are notified when a card is assigned to them

Clear, easily understood overview of all components for entire team
# Communication Basics

<table>
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<th>Who?</th>
<th>Inform</th>
<th>Keep It Simple</th>
<th>Timing</th>
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<tbody>
<tr>
<td>Identify all team members and their information needs</td>
<td>Provide enough data to avoid surprises</td>
<td>Don’t overwhelm with minute details</td>
<td>Find the right frequency</td>
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</table>
Communications Tools and Approach

Excel, Word, Powerpoint

Determine right approach by asking the board what info they want and how often they want it

Online template

Be prepared to change
Anatomy of a Status Report

Overview of work in progress (includes schedule/budget status)

Accomplishments during reporting period

Upcoming meetings / key dates review

Overview of risks and issues

Overview of change control (decision log)

OOTO schedule
# Status Report Examples

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<th>Topic</th>
<th>Deliverable</th>
<th>May 12</th>
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**Planned:**
- Information Architecture (IA)
- Functional Requirements
- Technical Architecture
- Information Architecture (IA)
- Wizard UI
- Dashboard IA
- Creative Brief
- Site Identity (Design)
- Quick UI Design
- Wizard UI Design
- Dashboard UI Design

**In Progress:**
- User Acceptance Testing (UAT)
- Site Launch - Code Freeze
- Site Launch - UI/UX

**On Track:**
- On Track

**On Hold:**
- On Hold

**Pending:**
- Pending

**To Do:**
- To Do

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**Examples**

- *Example 1*
  - Description: This is an example of a deliverable.
  - Status: Pending
  - Due Date: 08/01

- *Example 2*
  - Description: This is another example of a deliverable.
  - Status: Pending
  - Due Date: 08/01

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**Notes:**
- Notes for delivery of deliverables.
- Notes for acceptance testing.
- Notes for user acceptance.

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**Tables:**
- Table for tracking deliverables and weekly status.
- Table for tracking tasks and milestones.

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**PPT:**
- Presentation slides for current status and next steps.

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**References:**
- References for further information.
- References for best practices.

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**Contact:**
- Contact information for project team.
- Contact information for stakeholders.

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**Recommendations:**
- Recommendations for future projects.
- Recommendations for process improvements.

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**Conclusion:**
- Summary of the status report.
- Summary of the upcoming milestones.

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Daily stand-up meetings

QUICK – no more than 15 minutes

No one sits but the note taker

Round-robin, brief updates

• What I worked on yesterday
• What I’m working on today
• What challenges I’m facing

Do NOT troubleshoot during the stand-up
### Daily Stand-up Benefits

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Description</th>
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<tbody>
<tr>
<td>Everyone knows what everyone else is working on</td>
<td>Encourages teamwork for resolving challenges</td>
</tr>
<tr>
<td>Keeps you on top of everything without micromanaging or analyzing timesheets</td>
<td>Allows you to more efficiently redirect work when needed</td>
</tr>
<tr>
<td>• Or partner team members together for better results</td>
<td>Reduces risk of surprises</td>
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<td></td>
<td>Makes your own status reporting more efficient</td>
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</table>
Key Takeaways
Review and Repeat

PMI is not always right – but the structure is sound

A good WBS is your friend

Stick to the timeline, but understand change is constant

Communication is key: Use the best tools available for the project, team, and stakeholders

Status reports are critical for communicating with stakeholders and keeping the team synced

Daily stand-up meetings will keep you on top of what you need to know between status meetings
You don’t have to see the whole staircase, just take the first step.

Martin Luther King, Jr.
Thank you

Q & A

Visit the “IT Staff Development (Public)” Box folder

https://yale.box.com/v/it-staff-development