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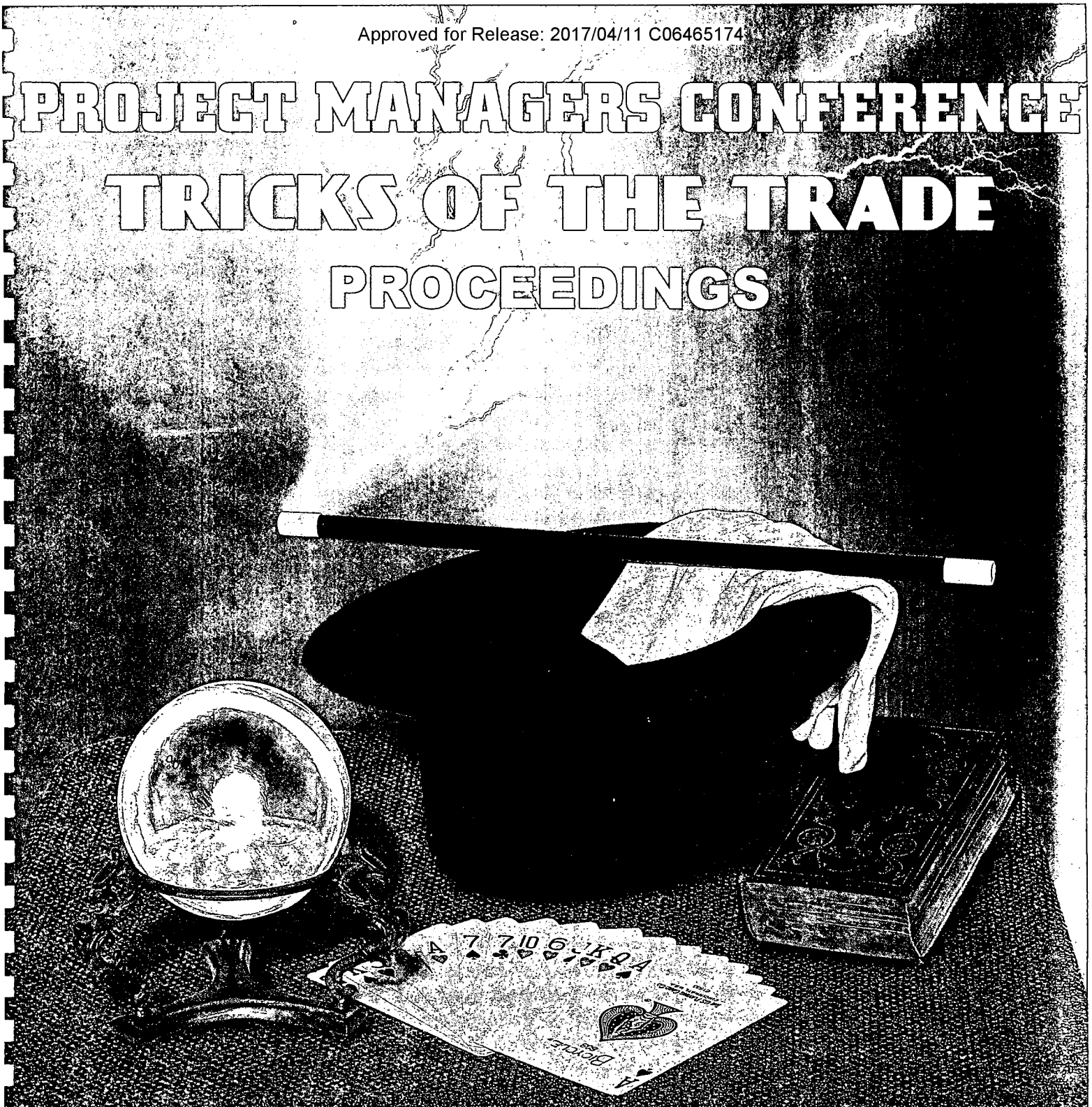
PROJECT MANAGERS CONFERENCE

TRICKS OF THE TRADE

PROCEEDINGS



6 OCTOBER 2004
8:00 A.M. - 3:30 P.M.
HQS AUDITORIUM

Sponsored by:
CIO/Enterprise Program Management Office

For additional information:

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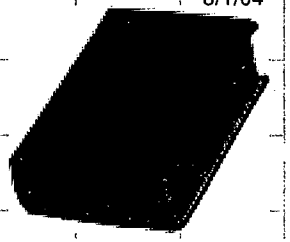
PPMC
PROFESSIONAL PROJECT MANAGER CERTIFICATION

8/1/04

Professional Project Management Certification

FY05 PPMC Curriculum



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Courses	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
PM101 - Introduction to PM and SE (5 days)	4-8 25-29		6-10	3-7 24-28	28-4		4-8	2-6	6-10 20-24		1-5 29-2	
PM201 - Project Integration and Scope Mgmt (4 days)	12-15		20-23			7-10		9-12	27-30			6-9
PM202 - Project Time Management (3 days)	18-20			10-12		14-16		16-18		5-7		12-14
PM203 - Project Cost Management (3 days)	25-27			18 19 21		17 18 21		19 20 23		11-13		15 16 19
PM204 - Project Risk Management (3 days)		1-3		31-2		22-24		24-26		18-20		20-22
PM205 - Project Communication Management (2 days)		4-5			7-8	28-29		31-1			15-16	26-27
PM206 - Project Team Management (2 days)		8-9			9-10	30-31			2-3		17-18	28-29
PM301 - Systems Engineering Principles (2 days)		8-9			7-8		11-12		6-7			
PM302 - Requirements Development (4 days)		10 12 15 16			14-17		18-21		13 16			
PM303 - Concepts and Architecture Development (2 days)		29-30			22-23		25-26		20-21			
PM304 - Integration, Verification and Validation (2 days)			1-2		24-25		27-28		22-23			
PM401 - Complex Project Management (5 days)			13-17							25-29		
PM402 - Strategic Project Management (5 days)				24-28							8-12	
PM001 - PPMC PM101 Test Preparation (1 day)							4	2	6 27		1 29	
PM002 - PPMC 2-Day Workshop (2 days)							11-12 25-26	9-10 23-24	13-14	11-12 25-26	8-9 22-23	12-13 26-27
PM003 - PPMC 3-Day Workshop (3 days)							13-15 27-29	11-13 25-27	15-17	13-15 27-29	10-12 24-26	7-9 22 23 26
PM601 - PPMC Diagnostic/Equivalency Test (2 days)	5-6	2-3	7-8	4-5	1-2	1-2	5-6	3-4	7-8 28-29		2-3 30-31	
PM602 - PPMC Post-Course Tests (1 day)	7 8	4 5	9 10	6 7	3 4	3 4	5 6	5 6	9 10 30	1	4 5	1 2
PM941 - CIA Project Management Process (1 day)	15		3		11		1		22		19	
PM951 - Microsoft Project Course (2 days)						10-11	18-19	19-20		18-19	22-23	19-20
PM952 - Software Engineering Management (5 days)		15-19		6-7		28-1						
PM991 - Executive Actions for Project Success (2 days)			20-21			21-22			20-21		24-25	
Holidays	11	11 25	25	1 20	21			30		4		5

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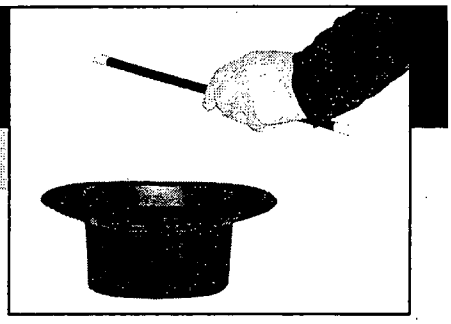
AGENDA



Project Management Conference
6 October 2004
"Tricks of the Trade"

0800	Conference Kickoff by [redacted] DCIO	(b)(3)
0810	EPMO and the CIO One-team by [redacted]	(b)(3)
0830	Portfolio and Project Management by [redacted]	(b)(3) (b)(6) (b)(6)
1000	Portfolio Management in the Agency The Process by [redacted] EPMO The Tool: [redacted]	(b)(3) (b)(3)
1100	[redacted]	(b)(3)
1130	Lunch / Conference PM Networking - Cafeteria Mezzanine	
1300	[redacted]	(b)(3) (b)(6)
1430	Lessons Learned from the PM of the Year - [redacted]	(b)(3)
1500	The Certification Requirements for Promotion [redacted]	(b)(3)
1530	Adjourn	

Conference Presentations may be accessed at [redacted] (b)(3)

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Enterprise Program Management Office (EPMO)

EPMO...Enabling the Agency Do the Right IS Projects Right

The Enterprise Program Management Office (EPMO) focuses on standards, methodologies, tools, policies, and practices that enhance the capability of the CIO to successfully deliver Information Technology (IT) and Information Management (IM) projects that meet the mission needs of the Agency. Our four major business areas in support of these objectives are: **Project Management**, **Portfolio Management**, **IS Governance**, and **IT Acquisition Strategy**. Below is a brief description of each area.

Project Management

... is the application of a defined process of programmatic rigor to a finite set of requirements that produces a product or service for a customer. EPMO adapts industry standards and best practices for project management and integrates them into the Agency's project management culture. EPMO currently has two major initiatives: CIA Project Management Process (CPMP) and Project Excellence (PE). CPMP is the framework for managing all IS projects from initiation through development, deployment, and retirement/replacement; it is required for all Agency IS projects. CPMP increases the chances of project success by identifying what to do, when, whom to engage, and in what forum. EPMO will be providing guidance in the near future on tailoring the CPMP. PE is an effort to provide best practices tools and guidance to help Project Managers apply the knowledge they gain from the Professional Project Management Certification (PPMC) program to their daily work environments. PE will leverage the nine core Project Management Knowledge Areas that every Project Manager is urged to build over the course of their career. The tools and guidance will be provided to Project Managers and line managers to help them oversee projects more successfully and with less effort. Facilitated sessions to apply the tools and guidance will be offered by EPMO as the tools become available. Risk Management is the first skill area to be addressed, and is currently being piloted in the CIO.

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Portfolio Management

...is the comprehensive management of Information Services (IS) investments throughout all Directorates and Mission Support Offices (MSOs). In order to control IS spending and manage all IS investments, the Agency is establishing specific guidelines for IS investment decision-making. To this end, and consistent with industry best practices, EPMO has taken a phased approach—beginning with the development and release of an innovative project management tool: [redacted] (b)(3) Additionally, EPMO has taken the lead in facilitating the development of a Portfolio Management Investment process within the CIO...and in the Agency. EPMO's commitment is to actively work in partnership with all of the Agency's components toward the common goal of effective Portfolio Management.

IS Governance

...process helps to ensure that IS systems are designed and delivered to meet their Agency customers' mission needs with the highest degree of satisfaction possible within the funding profile. Governance involves Agency senior leaders in the decision-making and review process so that Agency IS investments are made from a corporate and mission perspective. Governance also enables compliance with a variety of business equities such as acquisition, architecture, infosec, infrastructure, programmatics, and records management requirements. Governance includes clarifying the process and defining what supporting documents are essential to a program's successful implementation. Agency Project Managers are provided with document templates, control gate briefing templates, entry and exit criteria, and guidance to assist them in navigating the board process.

IT Acquisition Strategy (ITAS)

...serves as the critical enabler of the CIO's mission by working towards ensuring that all acquisitions for IS are efficiently planned for, formulated, and executed. Such acquisitions include requirements for commercial and non-commercial software and hardware needs, as well as systems integration and technical engineering support. [redacted] (b)(3)

[redacted] The CIO's [redacted] will be at the forefront of changing the way (b)(3) acquisition support is provided Agency-wide for IS requirements by implementing more streamlined, innovative, and cost effective contract vehicles.

We invite you to visit us at our website at [redacted] where you will find additional information and key contacts. (b)(3)

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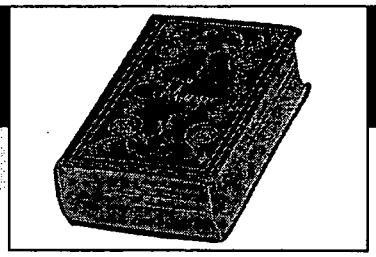

EPMO and the CIO One-team

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To view the EPMO and the CIO One-team presentation, please visit the conference proceedings at

(b)(3)

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Enterprise Program Management Office

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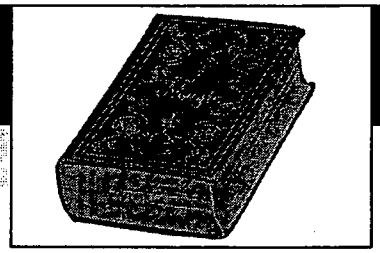

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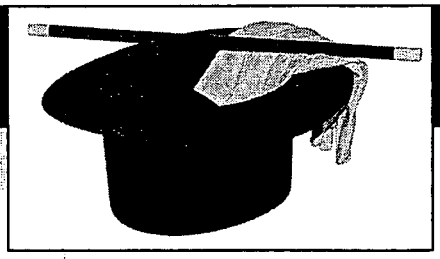

Portfolio and Project Management

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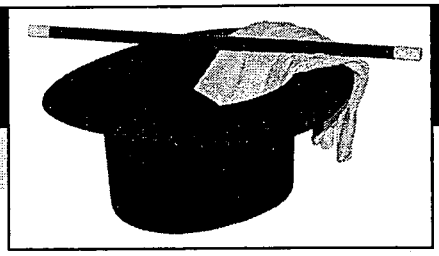

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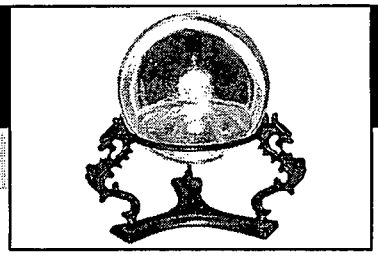

Portfolio Management in the Agency

The Process

[redacted] (b)(3)

EPMO/[redacted] (b)(3)

Enterprise Program Management Office - [redacted] (b)(3)

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Portfolio Management Process Development Project

Process Design

[redacted] (b)(3)

CIO/EPMO/[redacted] (b)(3)

10-06-2004

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Agenda

- Objective
- Project Background
- Process Overview
- Next Steps

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Objectives

We are providing a briefing on the IS Portfolio Management Process in order to inform you of:

1. The process steps, timeline and stakeholders
2. What this process means to Project Managers

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Project Background

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Project Background

- **Joint Requirements Development:**
  - ✓ [redacted] Briefed [redacted] for project kick off (b)(3)
  - ✓ Forum: May 4th & 5th
  - ✓ Follow-on Session 1: June 21st 0800-1000 [redacted] (b)(3)
  - ✓ [redacted] Briefed Alan Wade on Interim Results (June 25th) (b)(3)
  - ✓ [redacted] Briefed [redacted] on Interim Results (b)(3)
  - ✓ Follow-on Session 2: July 9th 1400 – 1600 [redacted] (b)(3)
  - ✓ Follow-on Session 3: July 20th 1300 – 1500 [redacted] (b)(3)
- ✓ Process Design Review Aug 23rd
  - ✓ [redacted] Briefed Alan Wade on Design Review Results (Aug 25th) (b)(3)
  - ✓ Brief CIO Corporate Board Sept. 1st
  - ✓ Brief PRB Sept. 8th
  - ✓ Brief [redacted] Sept 10th (b)(3)
- **Acceptance Review/Operational Readiness Review October 15th**
- Configuration Management/Continuous Process Improvement Ongoing

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Project Background (cont.)

Chairs

- **DD/CIO**
- **DD/CFO**

DO

DI

DS&T

HR

OS

DCI

GS

CFO

CIO

- Ed Cohen

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Project Background (cont.)

Our Scope was to "Define an integrated life cycle process for collaboratively":

- Identifying and prioritizing opportunities for investment.
  Including future investments (FY+2), fast track investments (FY or FY+1) and emergency investments (within 3-6 months)
- Monitoring performance of ongoing projects and activities
- Establishing exit or deceleration criteria for ongoing projects and activities.

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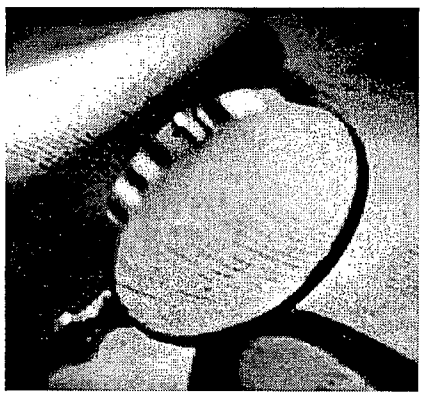
Project Background (cont.)

- The Process we developed is:
  - Repeatable
  - Transparent
  - Integrated
  - Compliant



- More importantly, the process was developed and accepted by a diverse set of Agency stakeholders

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Process Overview

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Process Overview

- Development—Identified "What" needs to be done
  - BPM Facilitated Sessions: Discovery record
  - Past Processes
  - Ad-Hoc Sessions
- Design—Added the "Who's" and "When's"
  - Trace ability
  - Multiple Role based views of process
  - Multi-tiered decomposition approach
  - Web site
- Results
  - Ideas & Needs Generation
  - Select (IPBS)
  - Quarterly Project Reviews

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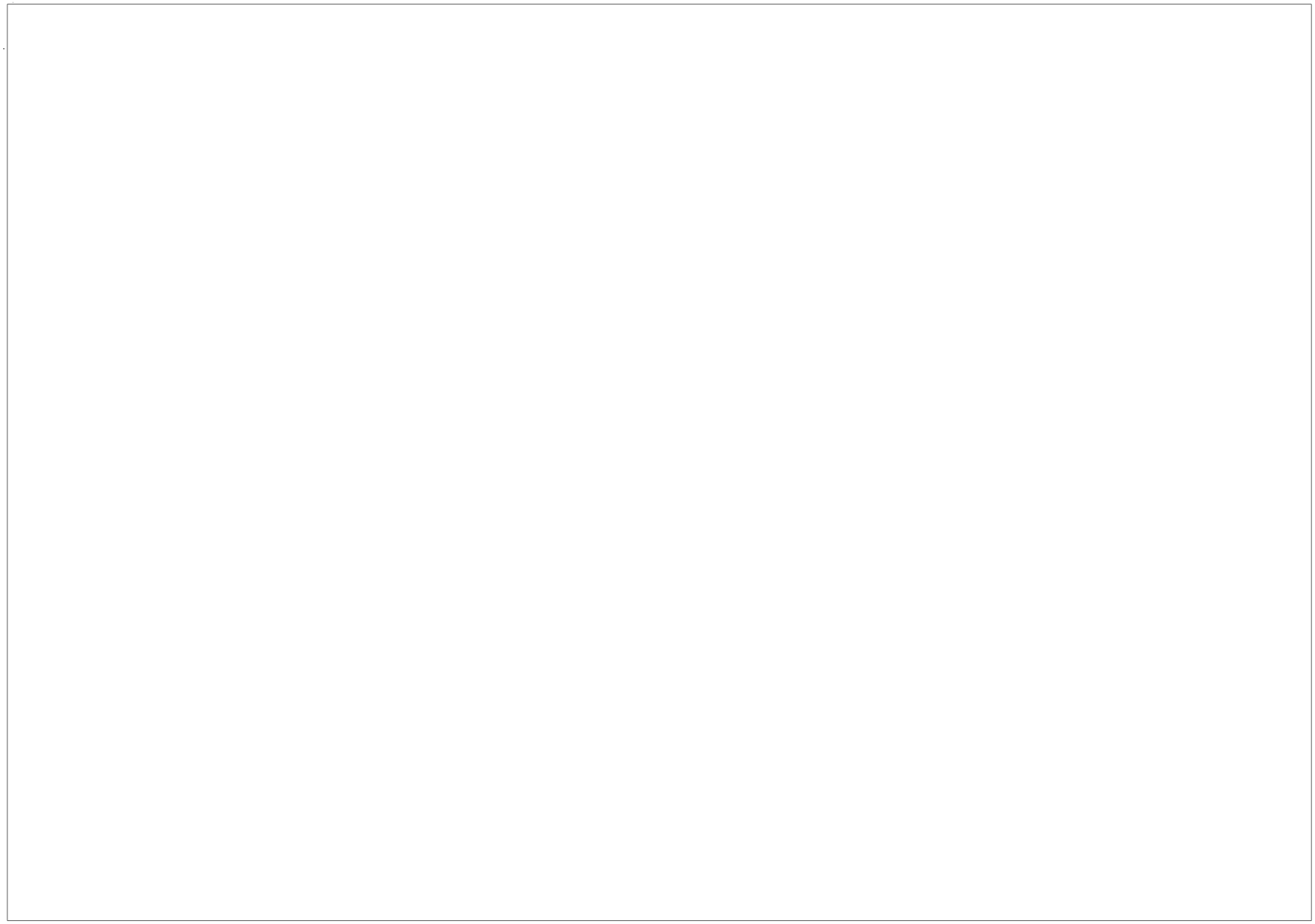

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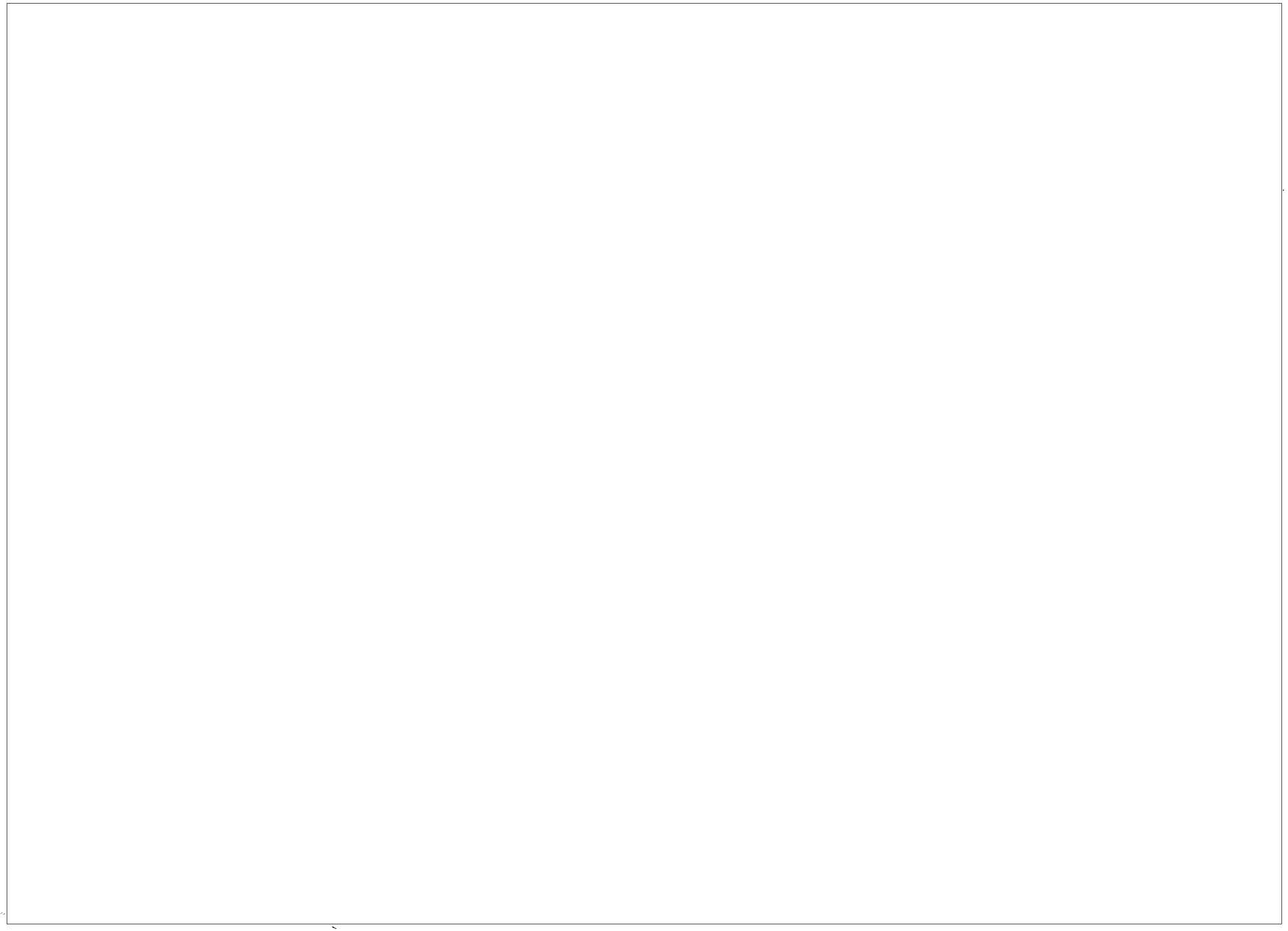

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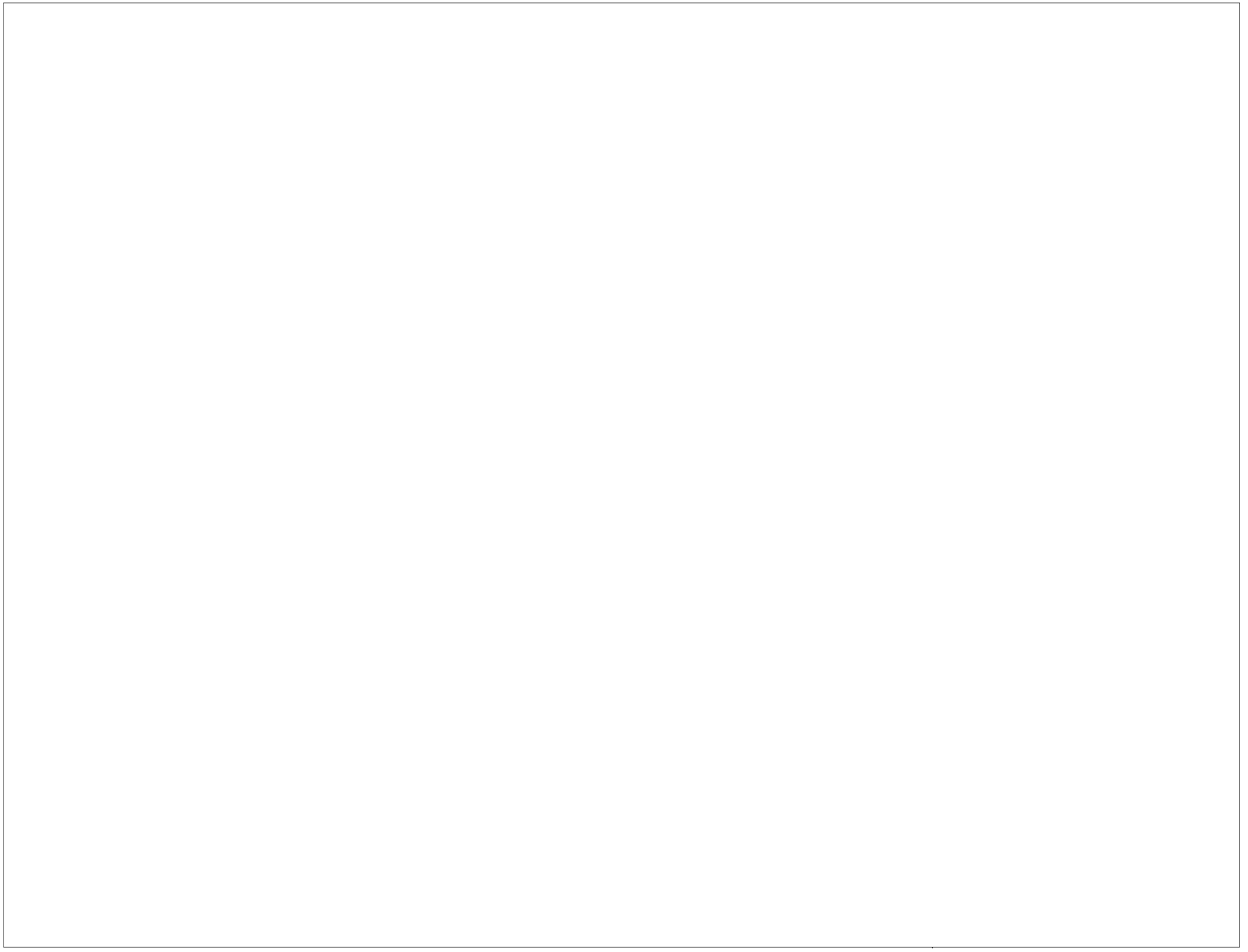

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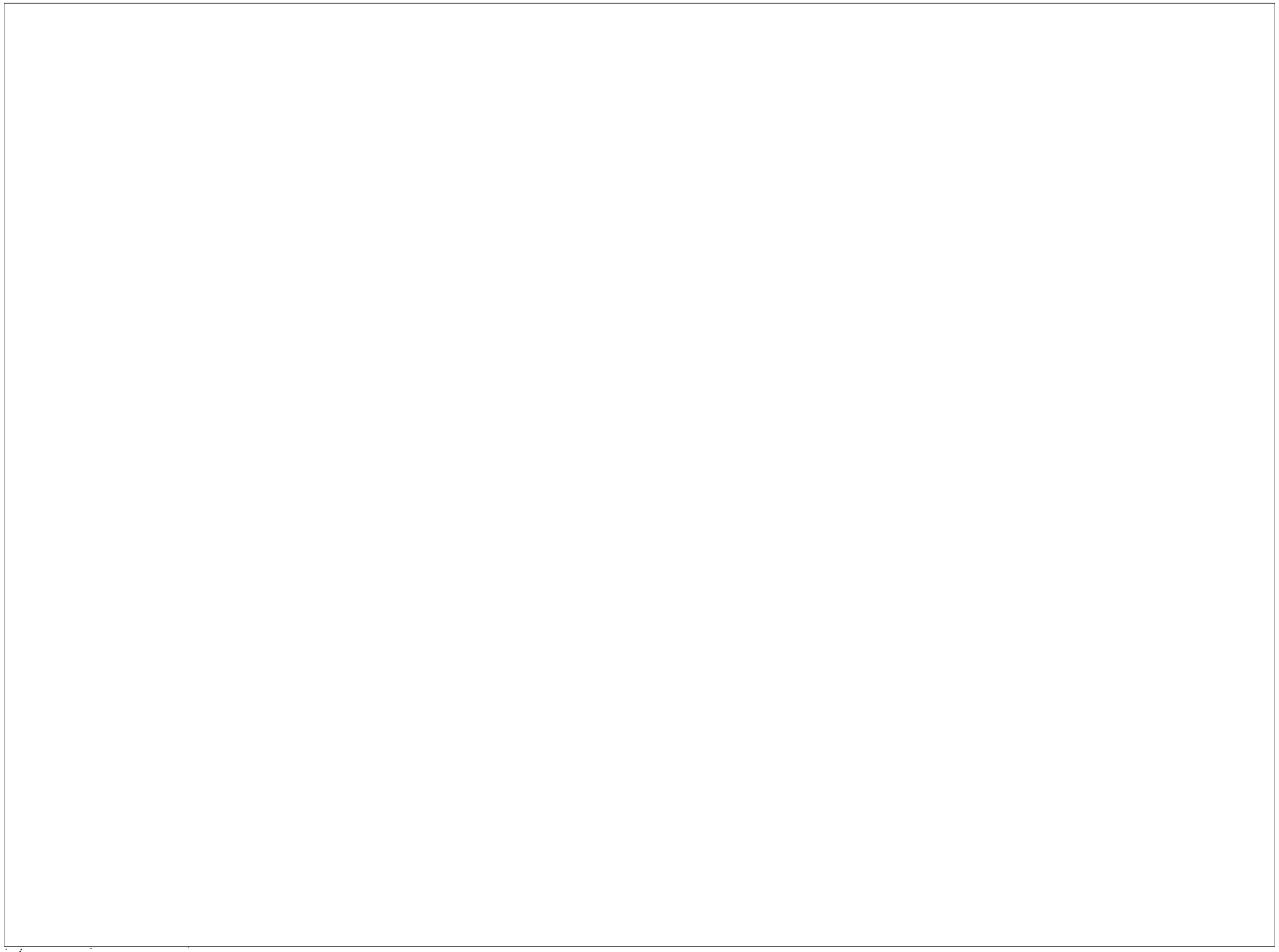

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PM Involvement Summary

- **Ideas and Needs Implementation**
  - Submission of Ideas or Needs for IS investment as appropriate
  - Assist Customer(s) with the development of the full IBC as appropriate

- **FY+2 through FY+7 Portfolio Selection (IPBS) Process**
  - Update Investment data in [redacted] upon request (b)(3)
  - Re-Plan Projects as Appropriate

- **Quarterly Project Review Process**
  - Dec/Mar/Jun/August: Update Investment data in [redacted] upon request (b)(3)
  - Re-Plan Projects as Appropriate

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What is in it for me?

- A better understanding of how seniors are making use of [redacted] data to make decisions
- Full access to the criteria seniors will use to assess investment potential and/or performance
- Better alignment between activities and strategic direction
- Ability to be proactive in IS planning

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Implementation Planning

- Implementation
  - Integration with: EPMO, [redacted] ISC efforts (b)(3)
  - Development/Refinement of Tools and Templates
  - Phased Approach
  - Configuration Management
  - Level of Effort Required
  - Project Schedule
- Process Impacts
  - Other Systems/Policies/Procedures
  - What policies need to be drafted?

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Next Steps

- Final Design Review and Approval
- Upon Design Approval
  - Implementation Plan
  - Web-Enable
  - Template Development
- Conduct Joint AR/ORR Late October
- "Phase-In" Process according to implementation plan

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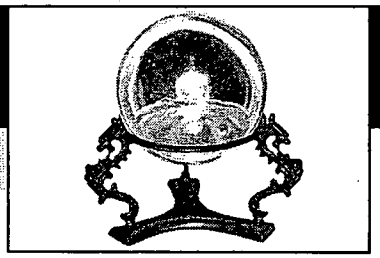

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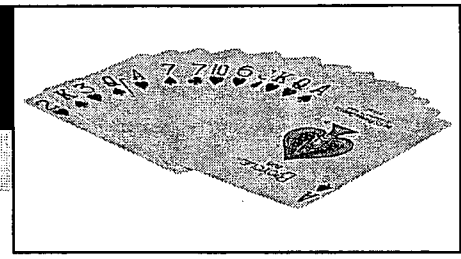

Portfolio Management in the Agency

The Tool: [redacted] (b)(3)

[redacted] (b)(3)

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[redacted] Version 1.1
Project Managers Conference
6 October 2004

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[redacted]

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CIO/EPMO [redacted]

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Status

(b)(3)

- Currently running Version
- Iterative development effort for phased implementation of new capabilities

(b)(3)

  - Phase 1 TRR, Phase 2 CDR on 29 September
  - Testing on 30 September

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Primary Functional (System) Requirements

- Resources
- Mission Alignment
- Schedule/Deliverables
- Business Case Abstract
- Threshold Assessment
- Technical Details
- [redacted] Interface

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Resources

- [redacted]

[redacted]

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Mission Alignment

- Benefit
- Scope
- Investment Type
- Mission Priority
- Strategic Information
- CIO Core Strategy
- Mission Alignment

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Schedule/Deliverables

- Next Deliverable
  - Projected Date of Deliverable/Milestone
  - Actual Date of Deliverable/Milestone
  - Duration
  - Projected Cost of Deliverable/Milestone
  - Actual Cost of Deliverable/Milestone
- IOC Date

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Business Case Abstract

- Current Situation
- Proposed Situation
- Impact Statement
- Measure of Success

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Threshold Assessment

- CPMP Threshold Scoring
- Risk Assessment
  - Organizational Risk Score
  - Requirement Uncertainty and Customer Involvement Risk Score
  - Technical Uncertainty Risk Score
  - IS infrastructure Risk Score
  - Implementation Risk Score

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Technical

- PRB Tracking Status
- Governance Process
- Status
- Number of Actual/Potential Users
- Certification Code
- Dependencies
- Compliance Code(s)
- Testing data
- Software/Hardware Details
- Classified Appendix

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- Integrate IS Portfolio into
  - Canned reports with prompts
  - Dynamic query capability
- Iterative delivery of reports following functional deliveries

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Demonstration

- Currently developing [redacted] (b)(3)
  [redacted] (b)(3)
- Demo will include views as currently available in Development Environment

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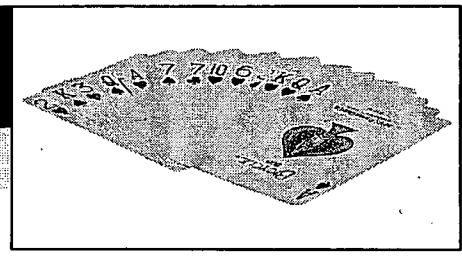

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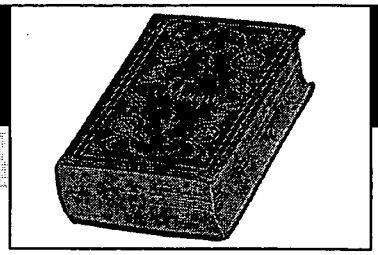

[redacted] Risk Pilot

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[redacted]

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Risk Management:

[redacted] Pilot

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PM Conference

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Agenda

- Introduction: Topics to think about
- Who is Practicing Risk Management (RM)?
- What is RM?
- How does it relate to Portfolio and Project Management?
- Helpful RM materials from the CIO Risk Management Process (C**R**MP)
- [redacted] Pilot Objectives (b)(3)
- [redacted] Risk Management (RM) Pilot Discussion (b)(3)

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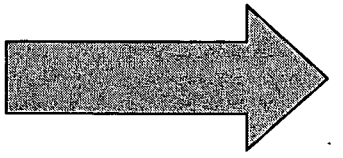
Introduction: Questions to Ponder

- Can you imagine preventing 90% of your project problems?
- Do you want to avoid project surprises and avoid team scrambling at the last minute?
- Would you like to know the deliberate actions to take to increase your probability of project success???

.....then 

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Try Practicing Risk Management

- Around the world, standard project management practices focus on risk management yet……
- Most project managers and those who work on projects ignore risks by doing nothing about them.

- Why? Is it due to:
  - Time constraints?
  - Lack of knowledge?
  - Inadequate tools?
  - Fear?
  - Negative connotation associated with risk?
  - Lack of open environment?

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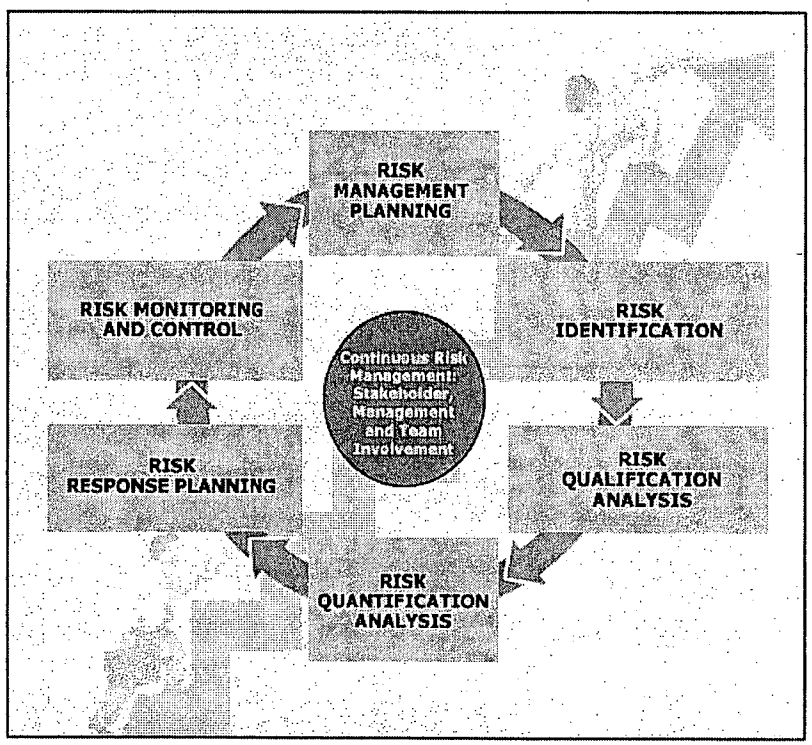
What is Risk Management?

- RM is one of the easier project management disciplines to implement and offers:
  - A structured way to uncover creative solutions to address potential project pitfalls.
  - A method to focus beyond technical topics and surface political, cultural, stakeholder, policy and environmental risks.



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How does RM relate to Portfolio or Project Management?

- Portfolio and Project Management is really all about **managing risk**
  - Lowers the probability of poor decisions
  - Enables the Agency to make solid information services decisions
  - Helps project managers more effectively:
    - Manage their projects
    - Communicate with management and stakeholders
    - Make timely decisions

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Try these Tools to Jumpstart your RM Efforts

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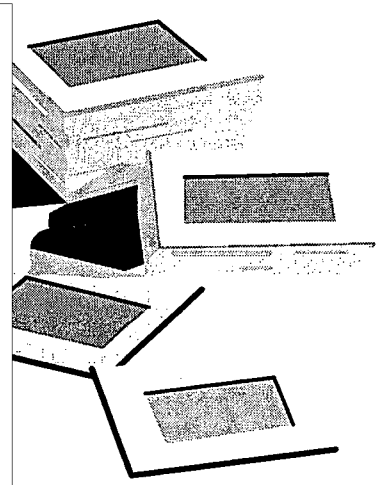

- CRMP Quick Reference Guide
- RM Framework

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Visit

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[redacted] is using CRMP

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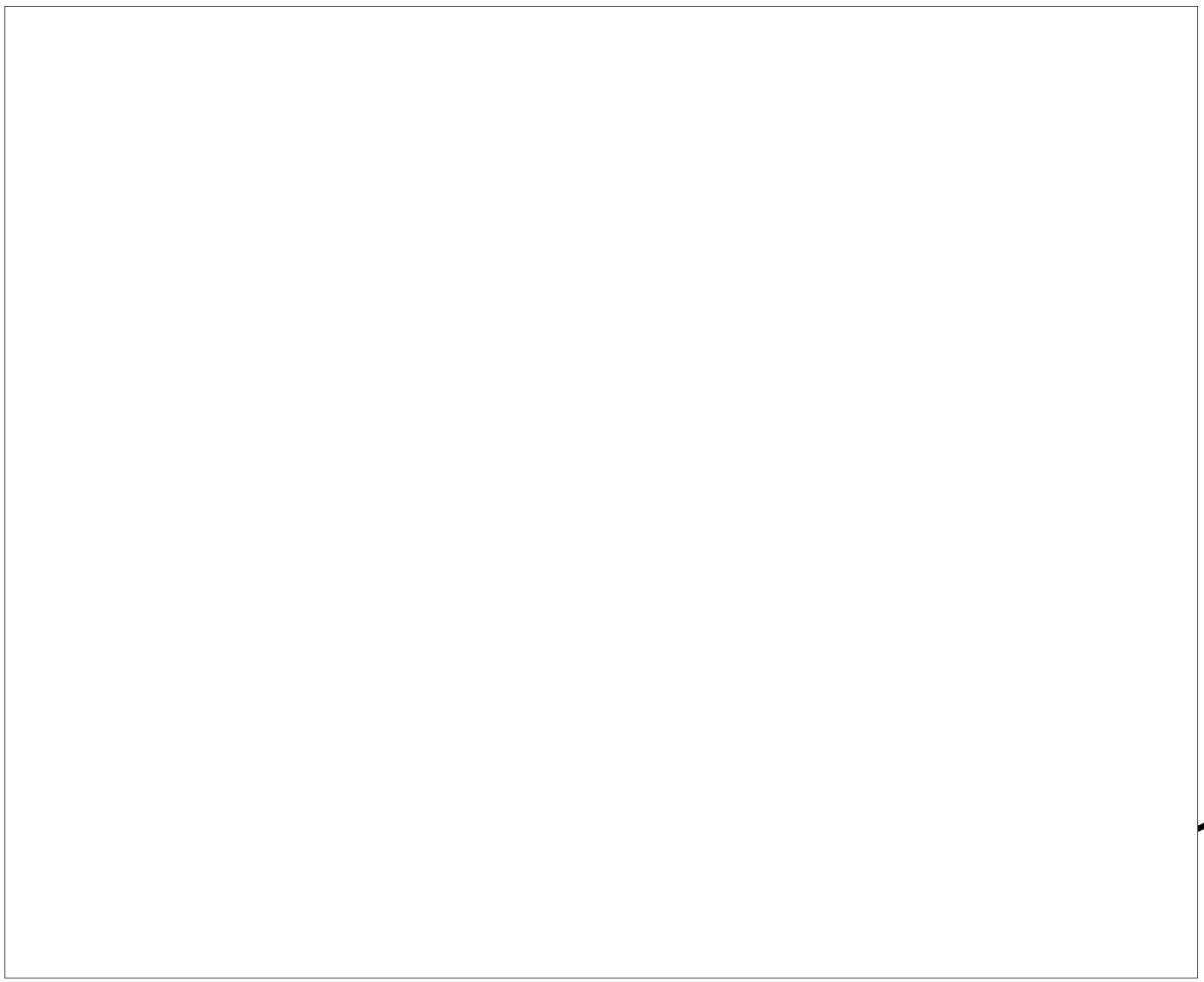

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Pilot Objectives

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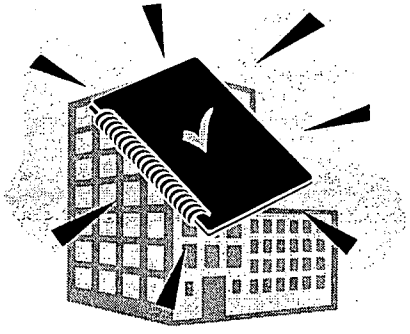
- Facilitate communication among project team members and stakeholders
- Capture an initial list of project risks, issues
- Develop a Top 10 Risk List
- Develop reasonable strategies to address the high priority risks (b)(3)
- Provide feedback to EPMO and on pilot activities and the RM process, techniques, guides, and effectiveness (b)(3)



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[redacted] RM: Pilot Kick-off Planning Session

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- CIO RM process would be followed, but altered to accommodate DCI 180 Day Activity schedule constraints
- Stakeholders would be included in RM Process as schedules allow
- Formal RM status meetings would be held twice per month
- Risk identification sessions would be orchestrated to address changing team dynamics
  - Project team expansion
  - Transition from rapid prototyping to a more formal system development approach
- Top 10 Risk List would be added to [redacted] monthly status reports to [redacted] CIO management

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Risk Identification Sessions

- Session #1: Program Team (b)(3)
- Session #2a: Technical Team (b)(3)
- Session #2b: Technical Team (b)(3)
- Session #3: (b)(3)
- Session #4:
- Session #5:

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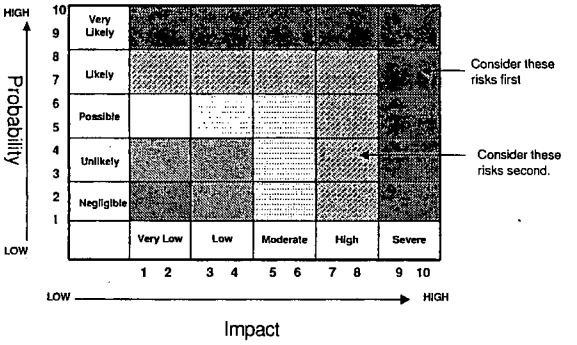
Results of the Pilot



- Identified over 40 issues
  - Examination of issues found that many issues had been or were in the process of being resolved
- Identified and analyzed over 130 risks:
  - 11 Red Risks:
    - Top 3 related to system performance and performance engineering
  - 21 Yellow Risks
- Involved the entire team in analysis of the risks identified on the "Rainbow Wall"
  - 5' by 15' wall of risks posted
  - Ranked based on impact and probability
- Held four risk status meetings, which helped to drive the RM process forward

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Impact of the Pilot Outside the [redacted] Team

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- Participation from team members, management and stakeholders resulted in:
  - Increased communication:
    - Rainbow Wall (Risk Grid) generated awareness and questions on RM
    - Sensitized others to the complexity of the [redacted] effort (b)(3)
  - Risks wider in scope than the [redacted] team were pondered by many (b)(3)
  - Resulted in actions taken by other organizations that benefited [redacted] (b)(3)

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Impact of RM Pilot on [redacted] Team Members

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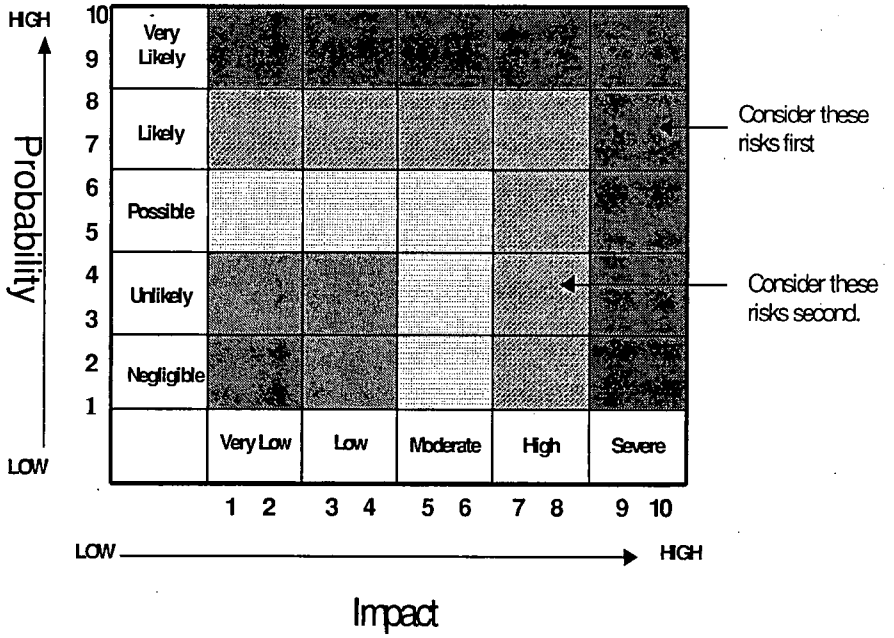
- Boosted morale
- Sensitized the team to the:
  - Importance of their specific contribution to [redacted]
  - Scope of [redacted] and the number of dependencies
  - Criticality of the schedule
- Increased communication by provoking focused informal discussions of the risks posted on the "Rainbow wall" or Risk Grid
- Educated team members who had limited exposure to risk



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Impact of RM Pilot on [redacted] Management Team

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- Elevated some risks into issues
- Addressed certain topics earlier than planned
  - Ex: resources for performance engineering/testing
- Exposed areas that the management team needed to review more in depth
- Identified the need to involve outside resources to handle certain risks

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[redacted] Pilot Feedback (b)(3)

- Key factors that led to successful pilot:
  - Independent risk facilitator
  - Protecting anonymity of those bringing up risks and issues
    - PM, Development Lead not present in other risk identification sessions
  - Materials were clear and thorough
    - [redacted] team offered suggestions to improve materials (b)(3)
    - EPMO RM Resource tailored templates and process to meet [redacted] needs (b)(3)
    - [redacted] team introduced ideas for risk checklists (b)(3)

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[redacted] Pilot Feedback (cont.)

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- Gave those without PM experience a sense of the challenges, issues and risks that must be resolved for the project to be successful
- Achieved the goal of educating [redacted] team members on importance of RM (b)(3)
- Some [redacted] team members are more proactive in bringing risks to PM (b)(3)
  - Not clear if is a result of the pilot or experience of team members
- Gave all stakeholders a broader view of [redacted] (b)(3)
  - Sensitized all stakeholders to "other" categories of risk

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Lessons Learned

- Pilot results would likely be different if:
  - Less experienced PM involved
  - Project chosen followed a more standard development path without such an aggressive schedule
  - RM introduced at project planning/start up phase
- Challenging to conduct pilot because:
  - Schedule pressures
  - Team already stretched
  - Pilot inserted in lifecycle mid-stream

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PM Tips

- Make a commitment to practice RM
  - Communicate this to the team on a regular basis
- Involve the entire team and stakeholders in the RM process
  - Post your risks/issues in a visible location for the team to review
- Schedule dedicated risk status meetings at least twice per month to keep the RM process moving
- Spend time understanding risks identified by drafting complete risk statements:
  - "Because of (condition/cause), there is a possibility that (risk event) will result in (effect/impact)."

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Excerpt from [redacted] Top Ten Risk List

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[redacted]

- Preparing the matrix forces you to think through risks, mitigation strategies and when to communicate to management
  - Which risks go to which level of management

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Where do I learn more?

- Visit [redacted] to explore the CIO Risk Management Process (CRMP)
- Call [redacted] to schedule a consulting session or meeting to jump-start your risk management process

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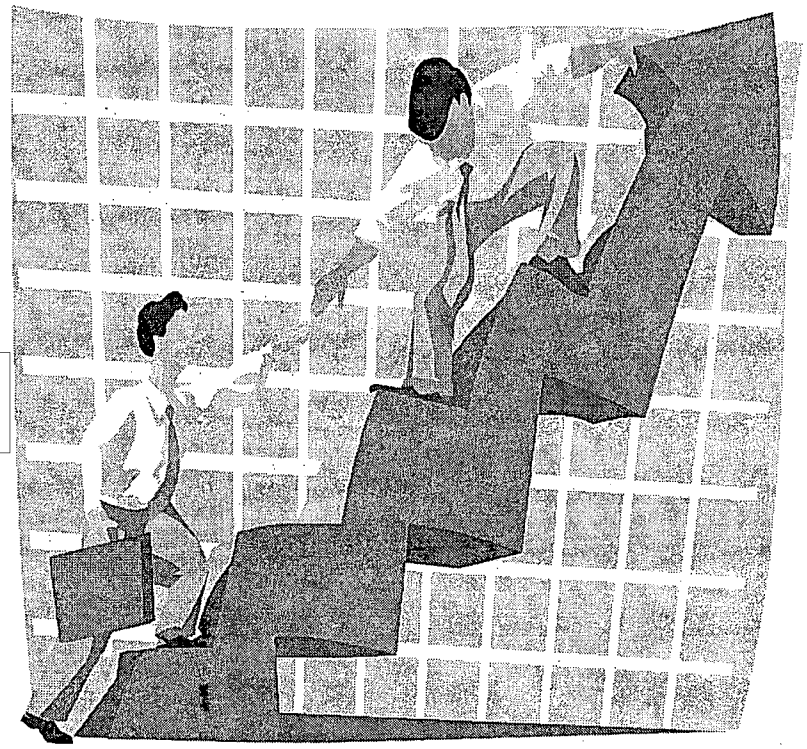

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Back Up Charts

- Back Up Charts

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Why the Focus on Risk Management?

- IS projects are inherently high risk:
  - Integration efforts take Project Managers (PMs) into the unknown
  - Dependencies and interdependencies are challenging to manage!
  - Resource constraints impact project delivery schedules
  - Touchy stakeholder, legal, political, and implementation risks are challenging.
- PMs practice RM as part of their thinking process, but usually not in a formal way, so they are often:
  - Over-burdened and can be less effective
  - Focused more on issues – not proactively approaching risk management

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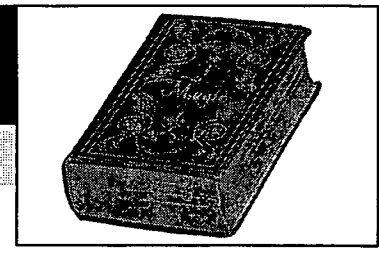

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Introducing: CIO Risk Management Process

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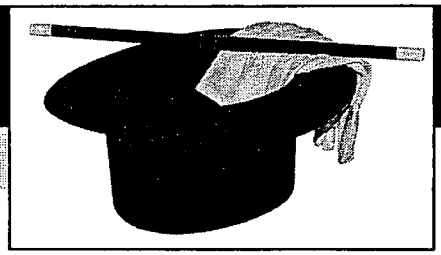

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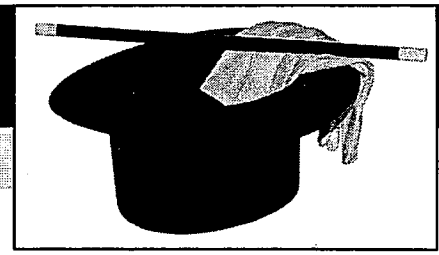

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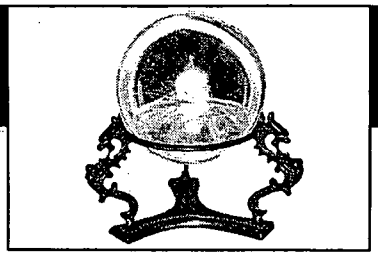

Lessons Learned from the PM of the Year

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To view the Lessons Learned from the PM of the Year presentation, please visit the conference proceedings at (b)(3)

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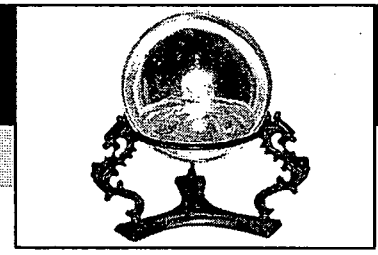

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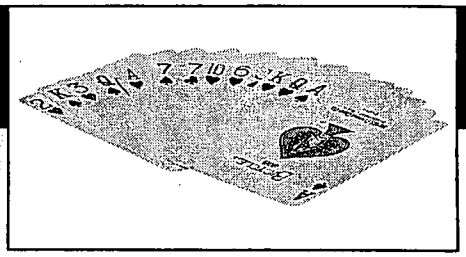

The Certification Requirements for Promotion

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PPMC
PROFESSIONAL PROJECT MANAGER CERTIFICATION

Professional Project Manager Certification

CIO PM Conference

6 October 2004

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Rev 1

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PPMC
PROFESSIONAL PROJECT MANAGER CERTIFICATION

Where Do We Stand?

- Eight courses piloted and in production
  - Level 1: PM 101
  - Level 2: Integration and Scope, Time, Cost, Risk, Communications, Team
  - Level 4: Strategic PM
- Five courses to be piloted in the next four months and are available for enrollment
  - Level 3: SE Principles, Requirements, Architecture, IV&V
  - Level 4: Complex PM
- Diagnostic/Equivalency Tests covering Levels 1 and 2 are now being offered

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PPMC
PROFESSIONAL PROJECT MANAGER CERTIFICATION

Where Do We Stand?

- PM 101 Test Preparation Workshop to be ready Spring 05

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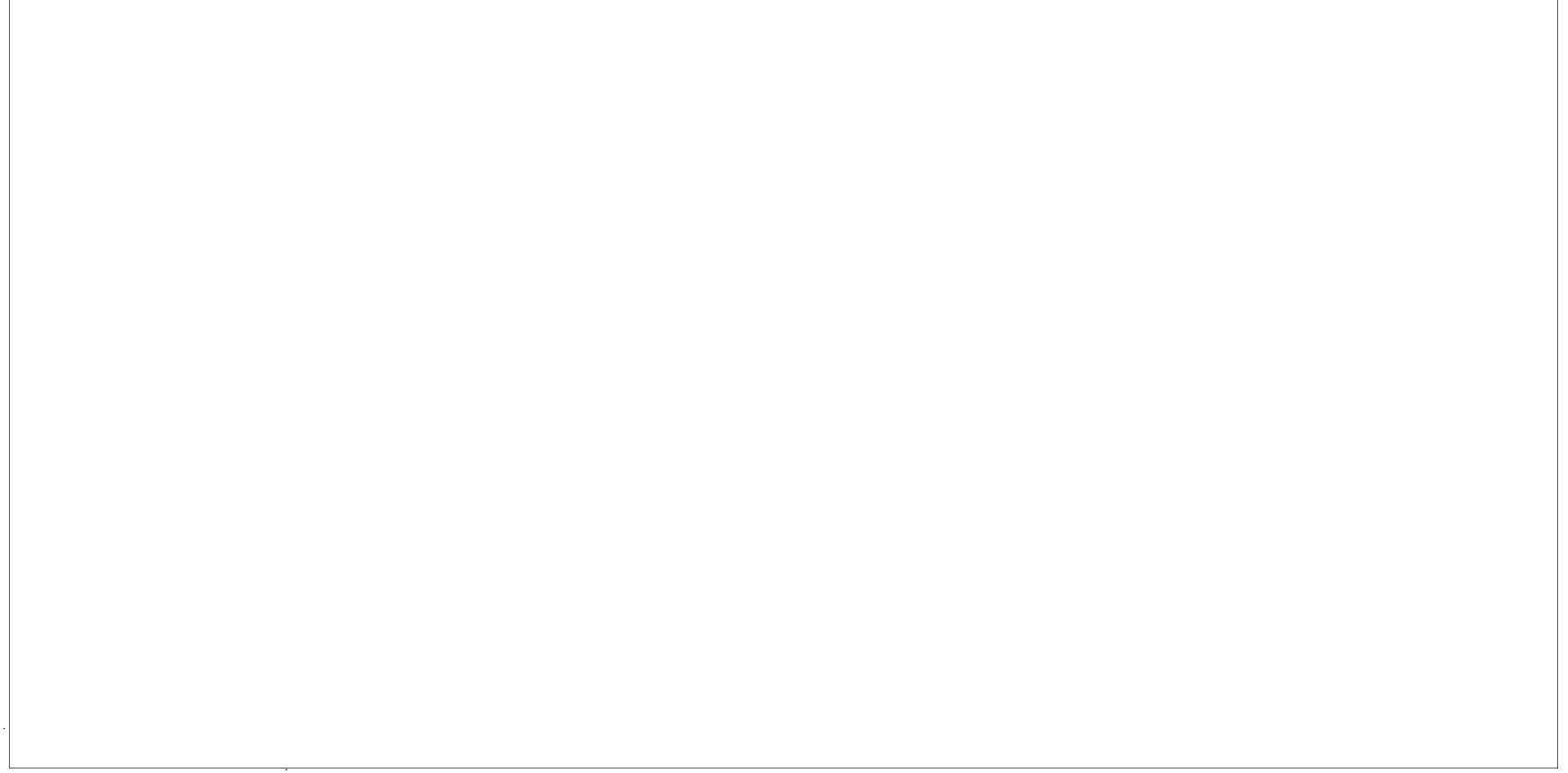

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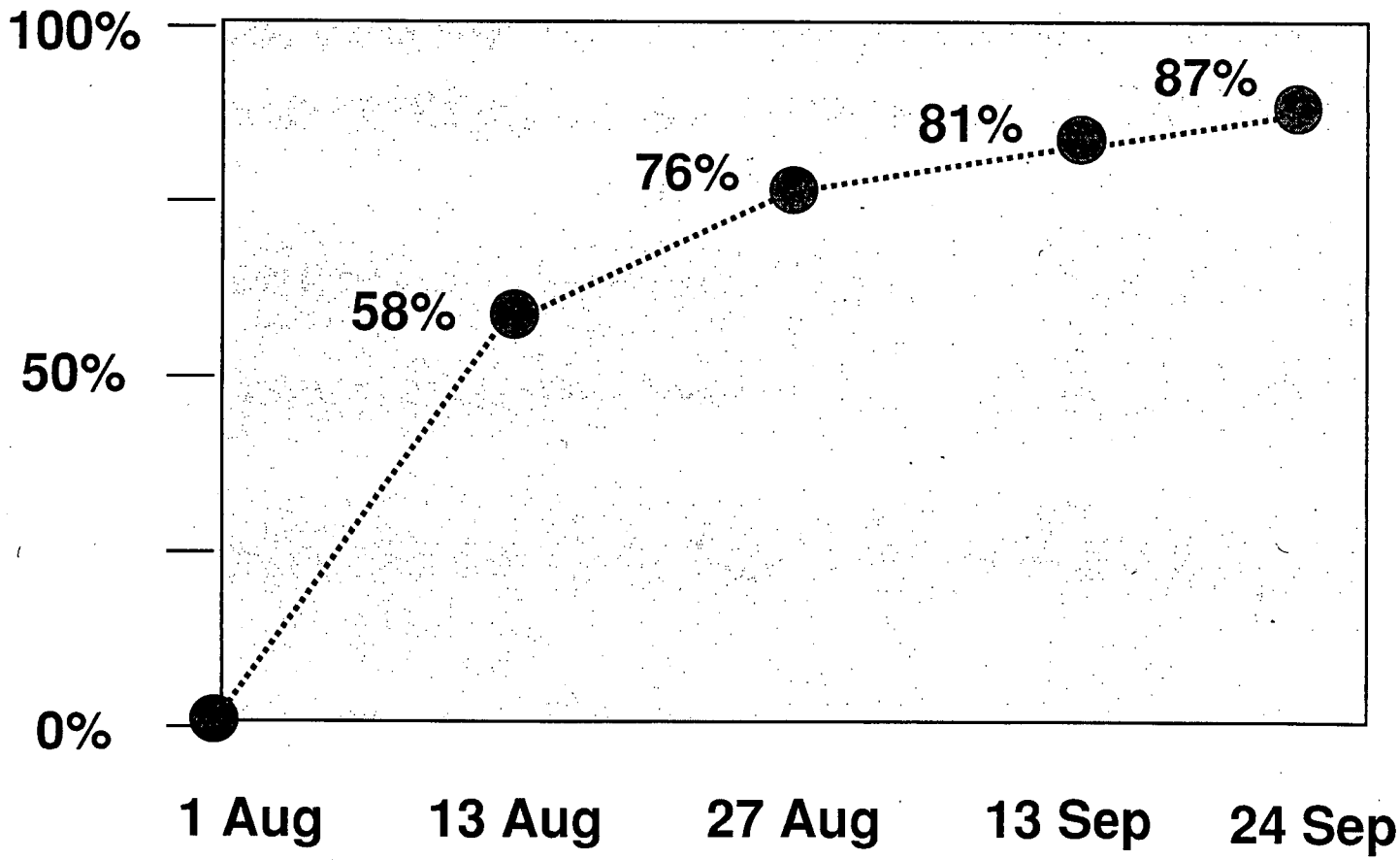
PPMC
PROFESSIONAL PROJECT MANAGER CERTIFICATION

PPMC Enrollment Growth for FY-05



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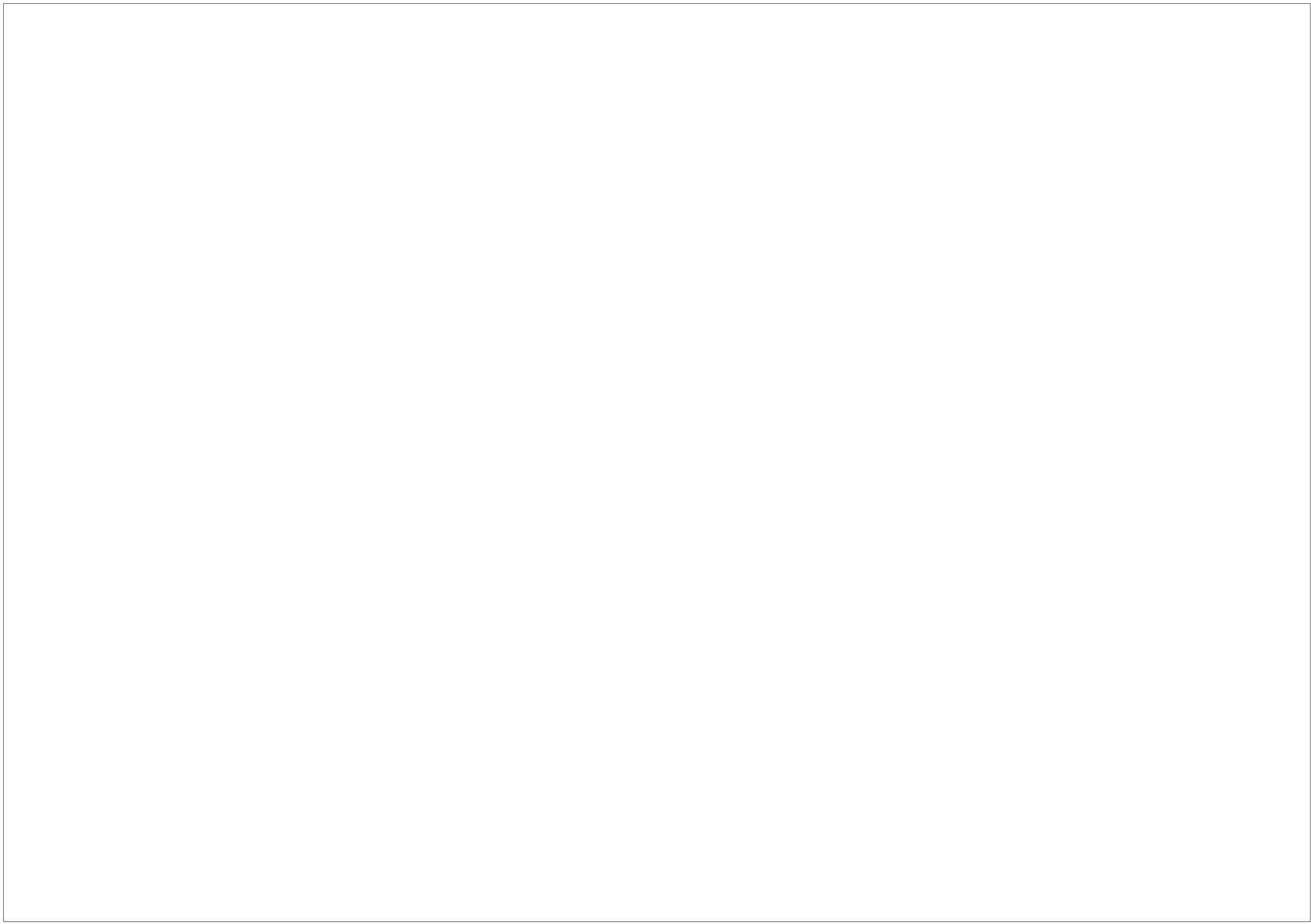

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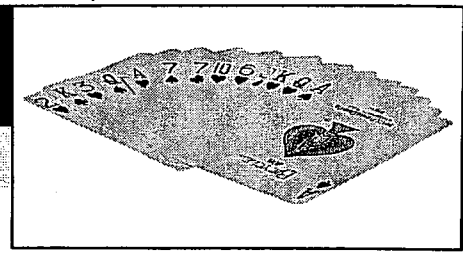
TRICKS OF THE TRADE

NOTES



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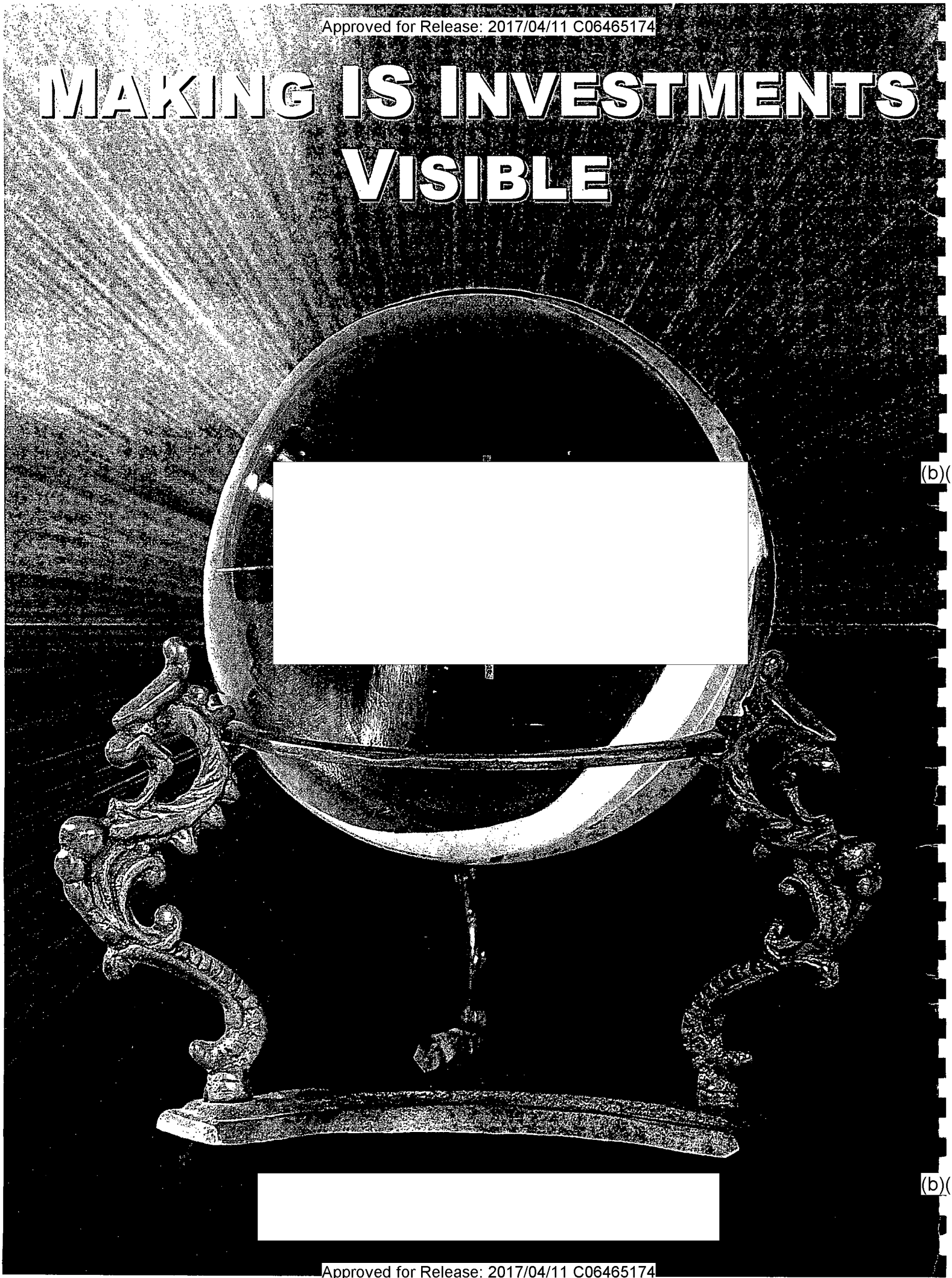
MAKING IS INVESTMENTS VISIBLE



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