

IT Project Management Best Practices at the College of William and Mary

Initiation

- I. Identify the project sponsor (s)
 - a. All projects require decision making authority beyond the PM and the team
 - b. Also give the project legitimacy
- II. Submit a project proposal to the sponsor (s)
 - a. Achieve two objectives: 1) Solidifies buy-in of Sponsor and begins the scope definition. Scoping and planning are iterative processes but they start with the proposal.
- III. Propose a project team and request resources

Planning

- I. Conduct a kick-off meeting with sponsor, project team and key stakeholders
 - a. Establish project manager role and responsibilities
 - b. Review team member roles, responsibilities and availability to project including supervisors
 - c. Ensure project participants and their supervisors have common expectation about time commitment to project and responsibility to project manager
 - d. Review and reach consensus on project scope
- II. Determine what planning documents are required and assign responsibility (depending on scope of project)
- III. Training plan, communications plan, risk plan, post-implementation support plan and SLA
- IV. Develop a schedule and a budget (again, depending on scope of project)
- V. Set up a project site in Ace (or basecamp)
 - a. This allows the PM to schedule due dates for planning docs and to set high level project phases that can be flushed out with more detail as it becomes available (iterative process)
- VI. Hold periodic review meetings to assess planning progress
 - a. Informal review meetings with project team
 - b. Periodic checkpoints that must be signed off on prior to moving forward
- VII. Conduct a planning review meeting to get consensus on final project plan
 - a. Ensure all project participants and key stakeholders understand the project plan and that all issues and risks have been identified and planned for as best as possible

Project Execution, Monitoring, and Controlling

- I. Assign tasks and follow up on progress against schedule
 - a. Keeps project progressing according to plan
- II. Hold periodic status review meetings to assess progress
 - a. Regularly held meetings with structured review agendas help keep the team focused
- III. Use an issue log to track open issues and assignment for resolution
- IV. Review identified risk scenarios to monitor probability of occurrence
 - a. Risks identified in planning have to be monitored and perhaps can be managed prior to becoming obstacles
- V. Communicate regularly to project sponsor and external stakeholders about progress
- VI. If warranted, apply quantitative metrics such as Earned Value Analysis to assess progress against the planned budget and schedule

Project Closeout

- I. Ensure all deliverables have been received and conform to project plan (obtain formal sign-off from client if possible)
- II. Document lessons learned about what worked and what did not work
 - a. Try to relate it to future projects