



Project Management

**The Integration of Timekeeping, Case Management, and
Accounting Systems
– Can They Come Together in Harmony?**

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Project Management ...



- Logic says that effective project management makes a world of difference in delivering a project on-time and on-budget.
- And you've probably seen technology tools used to help manage a project (e.g., Microsoft Project, Basecamp, Central Desktop, SharePoint), but there is a lot more to managing a project.
- Characteristics of an effective project manager, including how to bring out the best in your project team, having fun (yes, it is possible), avoiding conflict and misunderstandings, and implementing effective project management across ALL departments of a legal services program, INCLUDING accounting and finance.

Disclaimer...

- The suggestions in this presentation reflect one of many different ways conducting project management
- Each project manager has their own style and set of tools for conducting project management, **so there is NOT just one way** to be an effective project manager.

Section Agenda

- Project Management “Truisms”
- The What, Who, Why of Project Management
- Characteristics of an “Effective” Project Manager
- Steps to Managing ANY Project
- Managing Project Problems
- Why Do Projects Fail
- Reporting and Managing Up

Project Management “Truisms”*

- Nothing is impossible for the person who doesn't have to do it.
- There's never enough time to do it right the first time but there's always enough time to go back and do it again.
- I know that you believe that you understand what you think I said, but I am not sure you realize that what you heard is not what I meant.
- If you can keep your head while all about you are losing theirs, you haven't understood the plan.

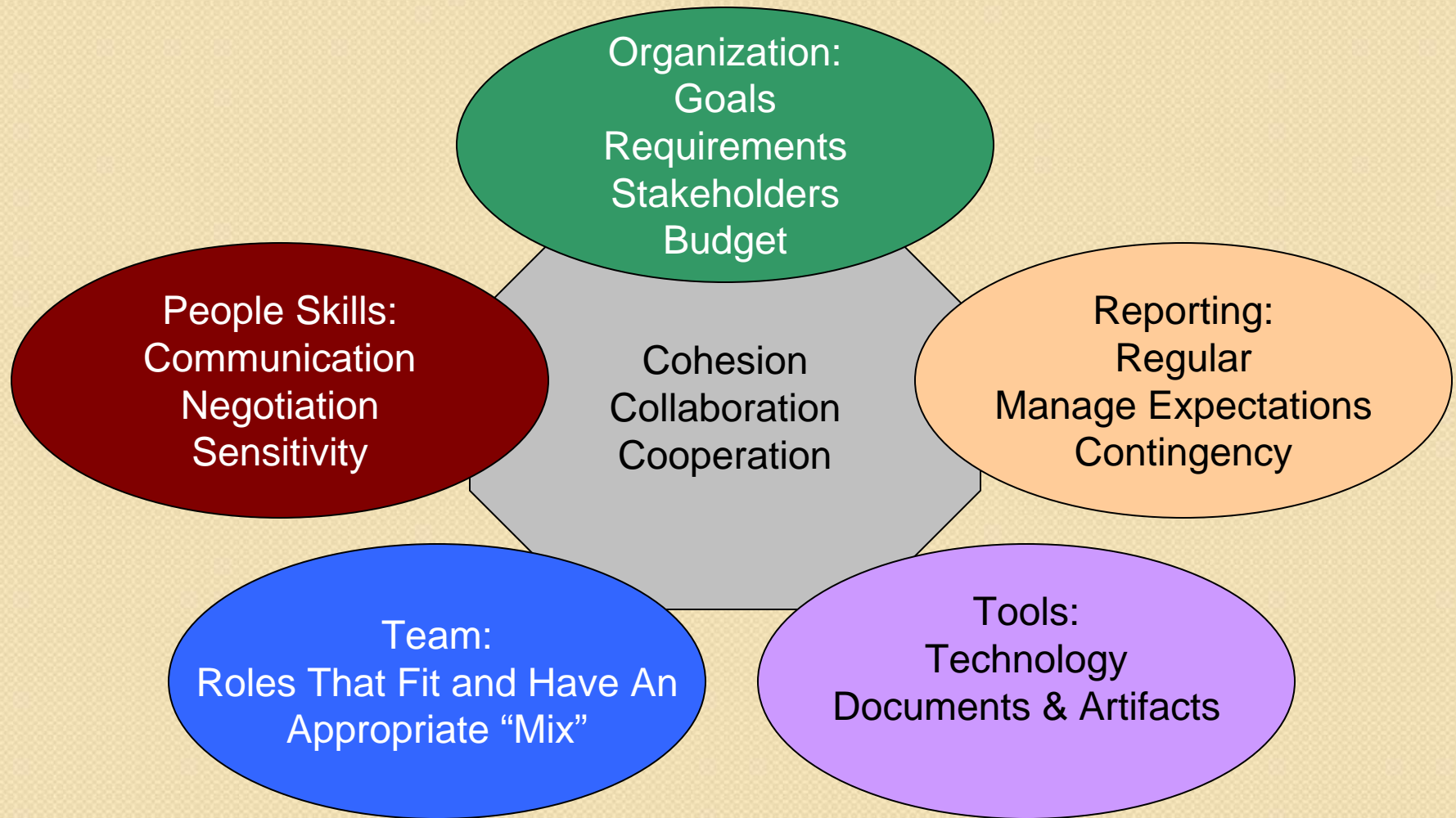
Project Management “Truisms”* *(continued...)*

- On Time – For “Cheap” – Works Right – pick two.
- There is no such thing as scope creep, only scope gallop.
- If you don't know how to do a task, start it, then ten people who know less than you will tell you how to do it.
- The person who says it will take the longest and cost the most is the only one with a clue of how to do the job.

What is Project Management?

- Effectively managing and delivering a project on-time and on-budget.
- Do you have to be certified in PMI*? That is certainly an option, but it's not required to be a good project manager.

Core “Pieces” of Project Management



What Projects Should Use Project Management?

- **Any** project with a goal and/or expected outcome, regardless if it has a budget or not, can benefit from using project management principles.
 - Legal Services Examples:
 - Accounting software development
 - Office project to “go green” (paperless)
 - HR project to transition to a new reporting system

Who Does Project Management?

- People at all levels of an organization, **NOT** just IT people.



Why Use Project Management on ALL Projects?

- What you “think” everyone is saying looks very different when they “see it”.
- Resource and cost management depends upon identifying members of the team, and defining exactly:
 - What each team member is doing on the project
 - Who is doing what on the project
 - When, how, for how long
 - At what cost
 - With what outcome
 - With what goals
 - With what measurements

Characteristics of an Effective Project Manager



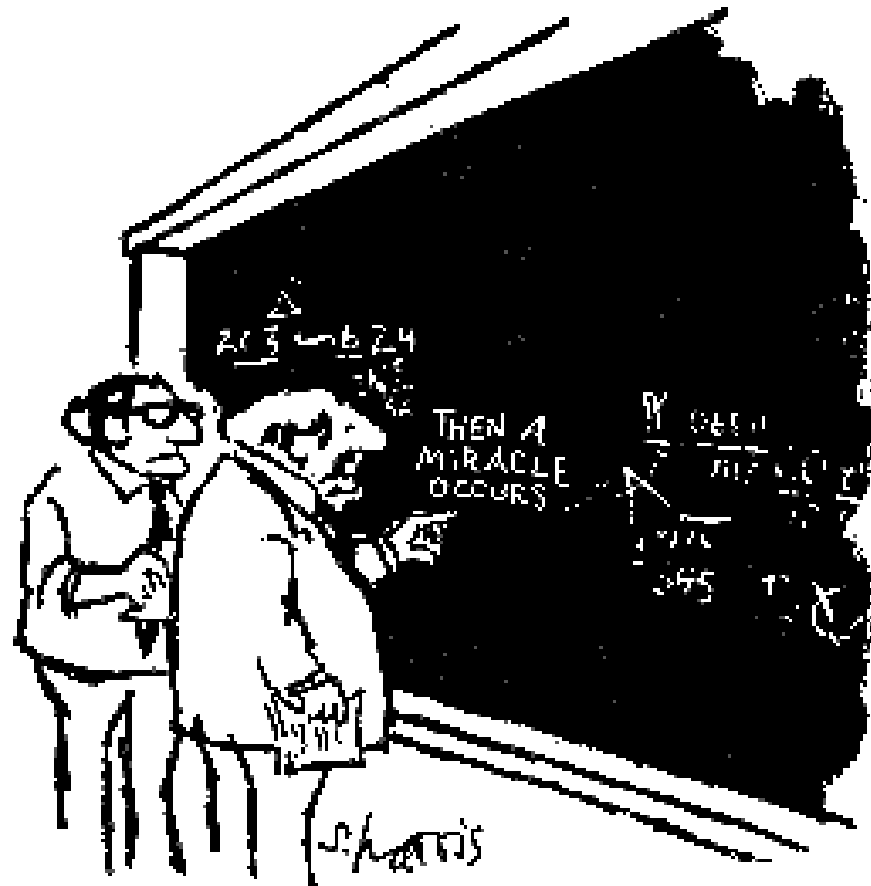
- Enjoys managing and organizing details
- Enjoys facilitating communications and working with people
- Has the ability to communicate with a variety of “personality types” and thinking preference styles
- Has the ability to use “intuitive creativity” to keep a project moving

Characteristics of an Effective Project Manager *(continued.)*



- Is constantly scanning the environment for signs of conflict
- Anticipates obstacles and changes in requirements
- Keeps the team and upper management abreast of changes in project timelines and deliverables
- Checks their ego-at-the-door and knows when to say “I don’t know, but I’ll find out and get back to you”

Miracle Happens Here



"I think you should be more explicit here in step two."

Steps to Managing Any Project

- Step 1 - The Idea (Solution, Suggestion) is Born of Perceived Necessity – **Inception Stage**
 - Brainstorm first
 - Narrow down the focus of the project
- Step 2 - The Details (what does that look like and what will it take for it to work) – **Elaboration Stage**
 - Written, specific details
 - DRAW IT OUT – Everyone has a different notion of what it will look like; get it on paper and then see if everyone agrees; if not, revise and review until everyone agrees
- Step 3 - The Build – **Construction Stage** (test, test, test)
 - Construction can be mockups of a print piece, a procedure, a brochure or a web-based tool, but NEVER go to final until all pieces have been tested by stakeholders and end-users
- Step 4 - “Go Live” – **Transition Stage**

Tools Utilized in Project Management

- GoToMeeting / GoToWebinar
 - For Communications, collaboration, meetings, etc.
- Technology
 - Basecamp
 - Central Desktop
 - SharePoint
 - Microsoft Project (and other MS products)

Project Management Tools

- Basecamp

[Back to Dashboard](#) | [Switch to a different project](#) [Project Settings](#)

Court Tour Audio-to-Video Project Huber and Company

Overview Messages To-Do Milestones Writeboards Chat Files People & Roles

Project overview & activity [New message](#) | [New to-do list](#) | [New milestone](#) | [New file](#)

TODAY

Comment

[Re: Better Way to Download Video Files](#)

Posted by Bryan H.

Comment

[Re: Better Way to Download Video Files](#)

Posted by Cynthia V.

WEDNESDAY, 17 DECEMBER 2008

Comment

[Re: Better Way to Download Video Files](#)

Posted by Chris C.

Comment

[Re: Better Way to Download Video Files](#)

Posted by Bryan H.

Milestone

[Integrate Videos with Player on Website](#)

Completed by Cynthia V.

Milestone

[Chris and Justin - Integrate Videos](#) (Due 5 Jan)

Assigned to Chris C.

Message

[Better Way to Download Video Files](#)

Posted by Cynthia V.

TUESDAY, 16 DECEMBER 2008

Comment

[Re: Kaivo Assistance with Court Tour Movie Integration](#)

Posted by Cynthia V.


OHIO LEGAL ASSISTANCE FOUNDATION

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someone posts a message, comment, or completes a to-do item or milestone?
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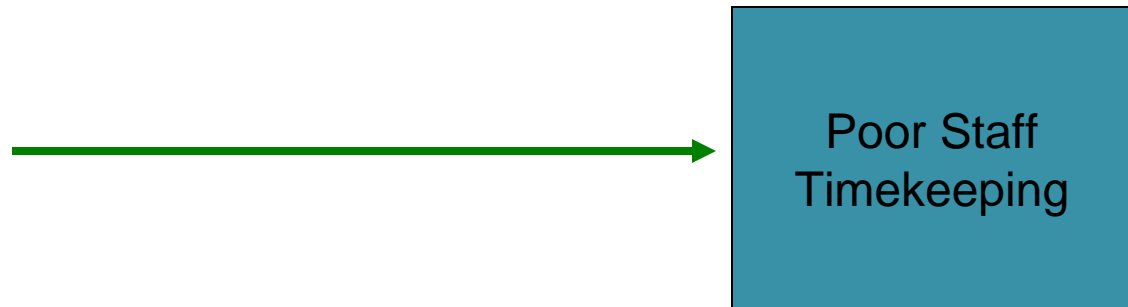
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A Suggested Technique for Analyzing Critical Project Problems*

- Cause and Effect Diagram – Fishbone Diagram
 - Problems can happen on any project.
 - Identifying interrelated causes can help analyze the situation and provide possible solutions
 - Benefits of the technique include:
 - Various causes can be explored
 - Encourages brainstorming for solutions
 - Provides a “visual” representation of the problem and possible causes

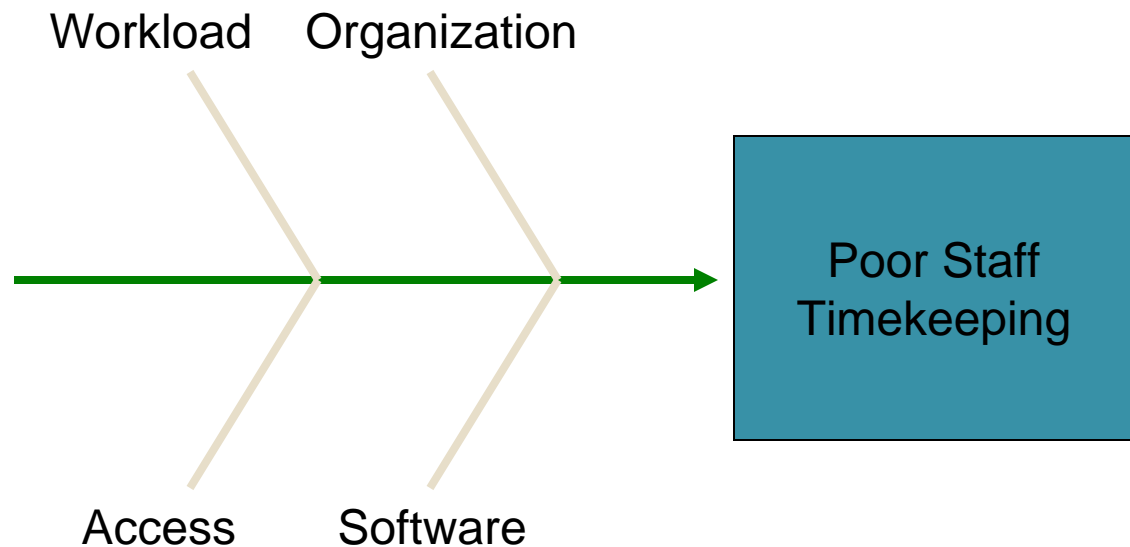
Fishbone Diagram

- Step 1– Describe the problem in a box on the right-hand side of the diagram and create the “fish” backbone by drawing a line to the problem.



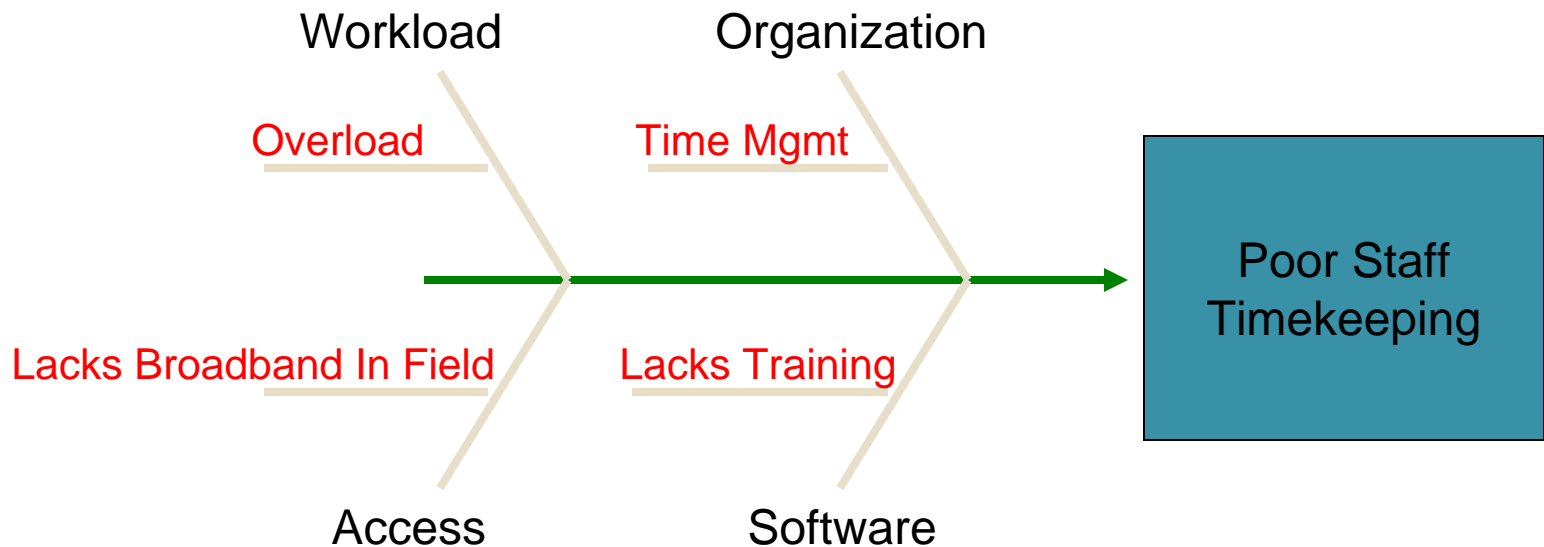
Fishbone Diagram *(continued...)*

- Step 2– Identify potential causes for the problem and group them as the “bones” of the fish. Use brainstorming to identify causes.



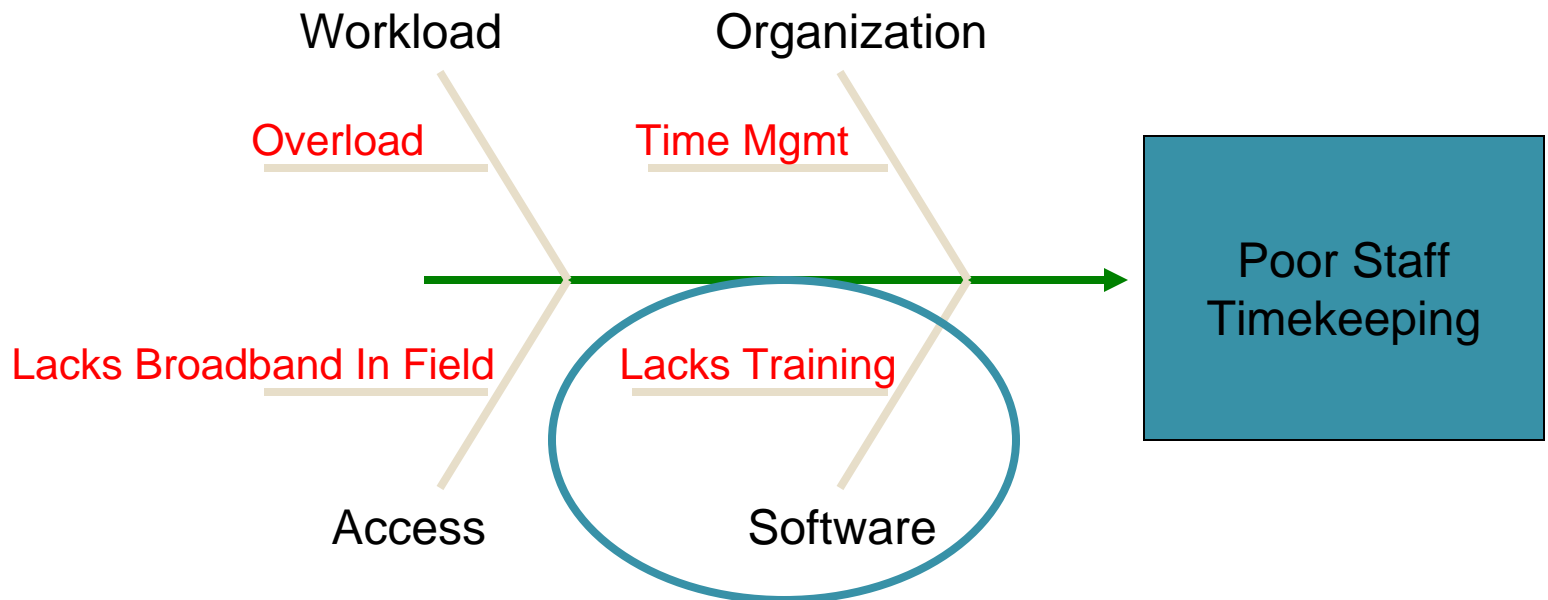
Fishbone Diagram *(continued...)*

- Step 3— Continue to brainstorm causes and fill in each “bone” with more details. Three levels of detail are usually enough.



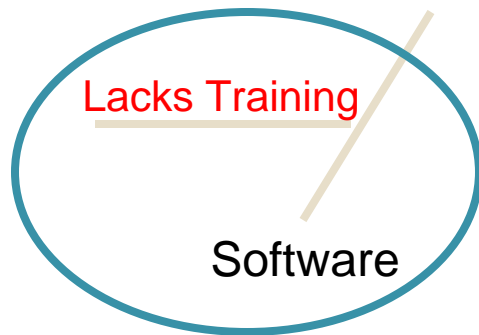
Fishbone Diagram *(continued...)*

- Step 4 – Analyze potential causes, then circle the one(s) that is most likely contributing to the problem.



Fishbone Diagram *(continued...)*

- Step 5 - Create a detailed task list with priorities and specific assignments to team members, with deadlines stating when issues will be resolved.



1. Survey all staff to determine level of issue
2. Identify staff that can train on software
3. Setup schedule of online training sessions
4. Conduct training sessions
5. Survey all staff for feedback on training
6. Re-evaluate and measure staff time keeping

Why Projects Fail

- Companies with **poor business analysis capability** will have three times as many project failures (versus successes).
- 68% of companies are more likely to have a **marginal project or outright failure** than a success due to the way they approach business analysis.
- Companies **pay a premium** of as much as 60% on time and budget when they use poor requirements practices on their projects.
- The vast majority of projects surveyed did not utilize sufficient business analysis skill to consistently bring projects in on time and budget.

Reasons Organizations Fail at Project Management*

- Organizations don't know how to implement cultural change
- Your organization is not committed
- You may have been burned in the past
- Organizations don't value the upfront investment of time
- Senior managers think that project management is a software tool

Percentage of Projects That Fail

- According to new research*, success in 68% of technology projects is “improbable.”
- The reasons include:
 - Poor requirements analysis causes many of these failures, meaning projects are doomed right from the start.

How to Execute Effective Project Management

- Requirements definition is critical.
- Be specific – write it down and DRAW IT OUT!
- Review the “drawing” with all stakeholders BEFORE coding, work, activity, etc., begins.
- Get feedback from the end user BEFORE finalizing anything!
- ALWAYS have the staff responsible for building, writing, coding, etc. , IN THE ROOM when requirements and goals are established for the project.

Tools For Handling Project Problems

- Spreadsheet of Issues:
 - State known problems (can use Excel or other table format)
 - Brainstorm possible solutions (for the first round of brainstorming, not “judge” it)
 - Eliminate what is known won’t work to fix the problem
 - Identify what will work
 - Assign who will do what, when and how
 - Schedule the next follow up meeting and include expectations for deliverables
- Fishbone Diagram

Questions?

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