Effective Project Communications for New Project Managers

UW-Madison IT Professionals Conference
May 31, 2018
Presenter: Tim Doyle, CIO PMO
Walk the Project Fence

Protecting the Team by Managing Stakeholder Expectations & Scope

Providing Business Value & Meeting Sponsor Expectations
It’s All About Knowing Your Audience
Communication Is KEY!

• Identify Expectations
• Timely and Consistent
• Focus on Benefits
• Change Cannot be Ignored
• Every place has its own culture!
And Now A Few Warnings!

• Every Team has different needs
• Prioritize and Prioritize Again!
• It’s NEVER EASY!
• Both Sides of the Fence
Thank you!

Contact info for more:
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Pass the Paper
A Collaboration Pattern

Robert Merrill
CIO Office PMO
May 31, 2018
There are **Software** Design Patterns

There are also **Collaboration** Design Patterns
Receiving Notice that it's Fixed

Story: would be better to notify all people who care

As a campus community member, I receive a notice that an outage I reported has been fixed, so that I don't have to keep checking the thing I can't get to.

You can collect a lot of...

Notes:
Different ways, depending on whether I have internet access, phone with text...

...audience we are helping is tiny (1 pers...

...better to serve anyone who wants...

Currently done via Resolving Incidents Rep...

...their incident was manually linked...

...allow for ad hoc not...
<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Short Name</td>
<td>Receiving Notice that it's Fixed</td>
</tr>
<tr>
<td>Story</td>
<td>As a campus community member, I receive a notice that an outage I reported has been fixed, so that I don’t have to keep checking the thing I can’t get to. You can collect a lot of</td>
</tr>
</tbody>
</table>

**Notes**
Different ways, depending on whether I have internet access, phone with text, or audience we are helping is tiny (1 percent) better to serve anyone who wants.
Repeat
All the way
Around
Follow up activity for Extraverts and Verbal Processors
More Collaboration Patterns and Other People Hacks
5 Project Management Tips for Non-Project Managers
Game of Milestones

A Project Manager’s Journey
Through the 5 Kingdoms of Project
Project Charter – Defining the End Game

What is the organization trying to achieve?

What is in scope or out of scope?

What role does everyone play?

Risks and Assumptions

A “living” document that is referenced throughout the project
Organizational Strategy Tool!

• What is your tool of choice?

• Does this work for everyone?

• Re-evaluate through out the project
Status Reports - No News is Not Necessarily Good News

- Status Report Benefits
- Consistent Frequency
- Review in Person
Status Reports – Impacts to the Project

WINTER IS COMING

GAME OF THRONES
YOU WIN OR YOU DIE
AN EPIC NEW SERIES SATURDAY, APRIL 17, 9PM
Face-to-Face Meetings

The benefits of face-to-face meetings:

• “Human” Connection
• Brainstorming
• Real Time Decision making
Project Closure – The Season Finale

• No Cliff Hangers – Project Charter/Status Reports
• Document what has been delivered with in the project
• Celebrate!!!
The SIPOC tool:
Create a visual model of a high-level process

UW-Madison IT Professionals Conference
May 31, 2018
Presenter: Tamra Dagnon, CIO PMO
Suppliers
Inputs
Process
Outputs
Customers
Use to collaboratively document a high-level business process
Aid project scope discovery
Quickly bring people to a common understanding
<table>
<thead>
<tr>
<th>Process:</th>
<th>Suppliers</th>
<th>Inputs</th>
<th>Outputs</th>
<th>Customers</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Process</th>
<th>Suppliers</th>
<th>Inputs</th>
<th>Outputs</th>
<th>Customers</th>
</tr>
</thead>
</table>
Process name

Use a Verb + Noun format (e.g. Recruit Students).
Begin with the process

Map it in four or five high-level steps
Define the outputs

List tangible things the process produces (e.g. a report or a letter)
Define the customers

List the people who receive the outputs
Define the inputs

List tangible things that trigger the process (e.g. a customer request)
Define the suppliers

List the people who supply the inputs
Every input should have at least one supplier

Sometimes supplier and customer are the same entity
Extras

Process purpose statement – why?

Process owner

Start- and end-points

Boundaries/limitations
### Example – High-level process capture

**Process: Manage Work Orders**

<table>
<thead>
<tr>
<th>Suppliers</th>
<th>Inputs</th>
<th>Outputs</th>
<th>Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>UW staff</td>
<td>Service work order (reactive to customer request)</td>
<td>Prioritized work</td>
<td>UW staff</td>
</tr>
<tr>
<td>FP&amp;M staff (including CRS)</td>
<td>Preventive maintenance (proactive)</td>
<td>Completed work</td>
<td>FP&amp;M staff</td>
</tr>
<tr>
<td>Students</td>
<td>Predictive maintenance (planned)</td>
<td>Ongoing/recurring work (open work orders)</td>
<td>Students</td>
</tr>
<tr>
<td>The public</td>
<td>Work order</td>
<td>Customer communication</td>
<td>The public</td>
</tr>
<tr>
<td>UW infrastructure, including automated systems (alarms, runtime monitors, etc.)</td>
<td>Funding</td>
<td>Reports</td>
<td>UW infrastructure, including automated systems</td>
</tr>
<tr>
<td>Non-UW agencies (City of Madison, contractors, DGA, regulatory agencies)</td>
<td>Approval (customer or supervisor)</td>
<td>Work order</td>
<td>Non-UW agencies (City of Madison, contractors, DGA, regulatory agencies)</td>
</tr>
<tr>
<td></td>
<td>Billing</td>
<td></td>
<td>UW schools/colleges/departments/programs</td>
</tr>
<tr>
<td></td>
<td>Approval (customer or supervisor)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Process**

**Create work order**
- Requires: Location, description of work needed/shop, requester information, funding information; documents/photos are optional, safety concerns (ties in to priority)
- Includes meetings, consultations, training, etc.

**Triage/prioritize/re-prioritize work**
- Could be just for an estimate

**Assign/plan/approve work**

**Perform/track/communicate about work**
- Includes tracking time, obtaining supplies from inventory or purchasing materials, and customer communications
  - (Time tracking, purchasing and customer portal processes are covered elsewhere)

**Complete work**
- Includes customer notification, satisfaction surveys, and billing
  - (Billing process is covered elsewhere)
- Could be re-opened to address unfinished or unsatisfactory work
Example – Common scope discovery

<table>
<thead>
<tr>
<th>Suppliers (of Leads)</th>
<th>Inputs</th>
<th>Process</th>
<th>Outputs</th>
<th>Customers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>Lead data</td>
<td></td>
<td>Engaged leads</td>
<td>Chancellor's Office</td>
</tr>
<tr>
<td>Applications</td>
<td>Work list</td>
<td></td>
<td>Orientation attendees</td>
<td>Registrar's Office</td>
</tr>
<tr>
<td>Deposits</td>
<td>Commitments</td>
<td></td>
<td>Prioritized leads</td>
<td>Students</td>
</tr>
<tr>
<td>Orientation registrations</td>
<td></td>
<td></td>
<td>Admission decision</td>
<td>Campus partners</td>
</tr>
<tr>
<td>Lists</td>
<td></td>
<td></td>
<td>Segmented communications</td>
<td>Internal staff</td>
</tr>
<tr>
<td>Social media</td>
<td></td>
<td></td>
<td>Work list</td>
<td></td>
</tr>
<tr>
<td>Referrals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Students</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Manage contact records (See separate SIPOC; happens throughout Recruit Students process)
2. Conduct outreach
3. Receive/review application
4. Make admission decision
5. Manage enrollment
6. Measure enrollments

Note: This is a NON-linear process
Sorry, no time for questions…. but for answers, contact Tamra Dagnon!

tamra.dagnon@wisc.edu

Thank you!