

PROJECT MANAGEMENT

Topic 16

Start & Termination

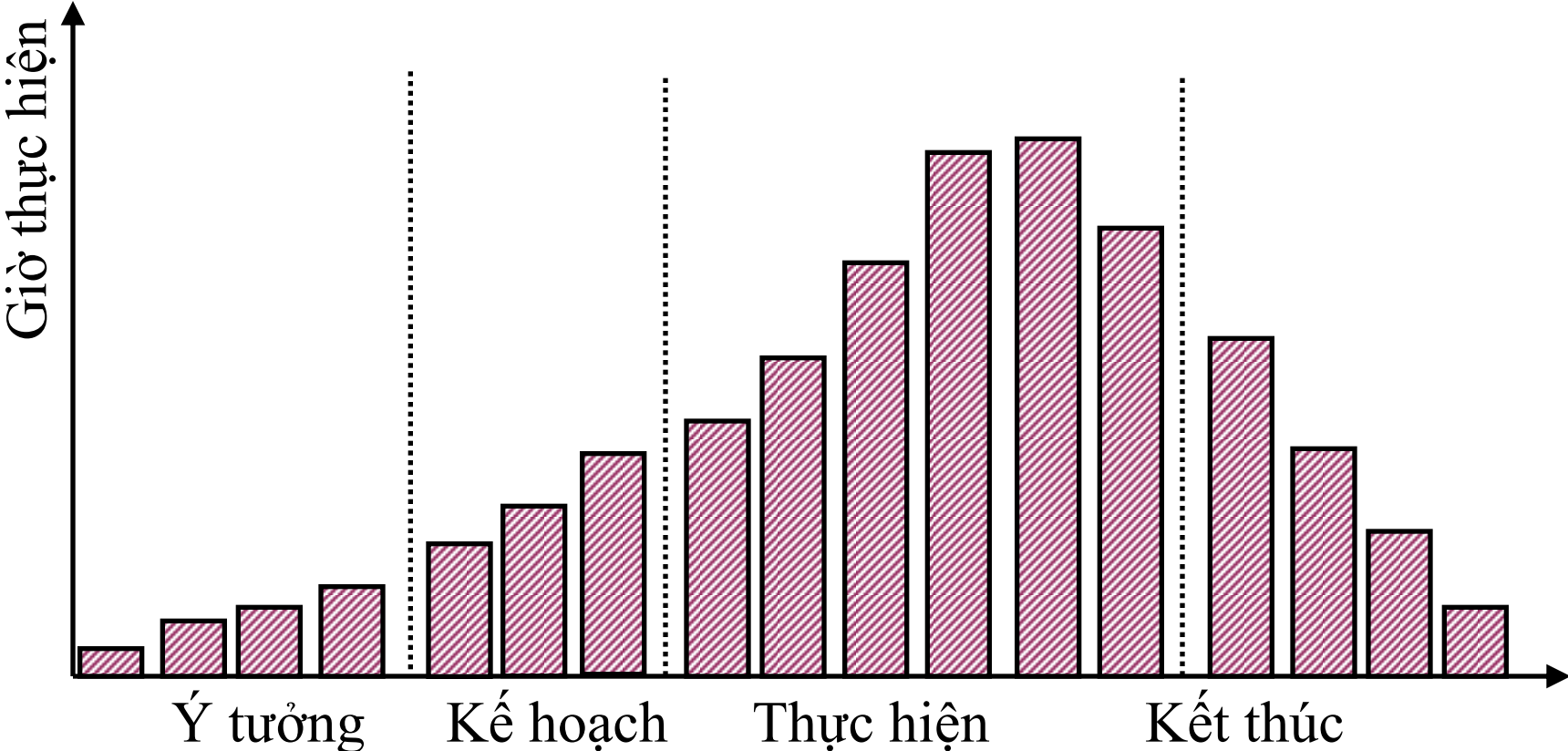
Contents

- Project life
- Project Implement
- Project closure
- Getting Client Acceptance
- Documenting the project
- Conducting the post-implementation audit
- Writing the final report



Project life

Chu kỳ dự án



Project life

Tác vụ

Ý tưởng – Phát triển các mục tiêu ban đầu và đặc tính kỹ thuật.

Kế hoạch – Chi tiết tất cả các đặc tính kỹ thuật, các nhiệm vụ và kế hoạch cho các nhiệm vụ

Thực hiện – Thực hiện dự án

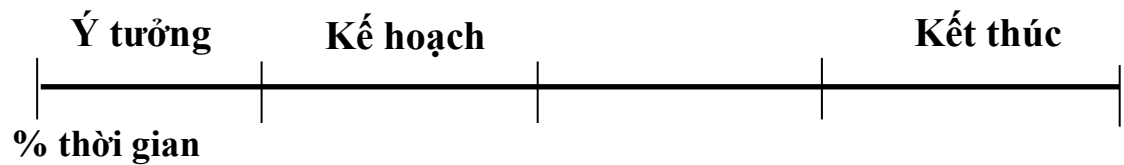
Kết thúc dự án – Chuyển kết quả của dự án đến khách hàng, bố trí lại nhân lực.

Project life

Thời gian cho tác vụ

- Ý tưởng
- Thiết kế, kế hoạch
- Thực hiện
- Kiểm tra
- Kết thúc

Phân bổ thời gian



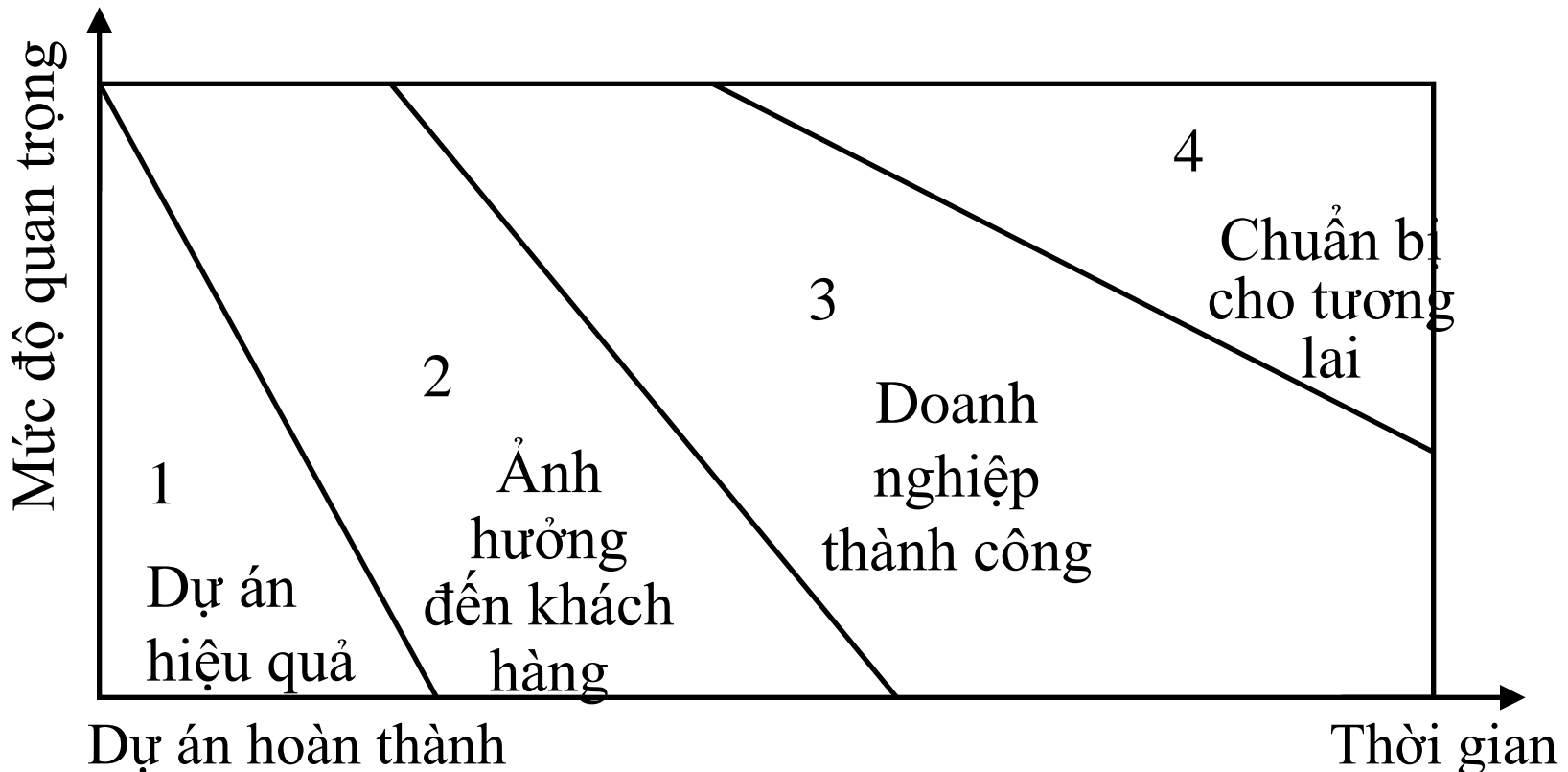
☞ Dựa vào % phân bổ thời gian để đánh giá dự án.

- Ý tưởng, thiết kế - kế hoạch: Cần kiến thức, công nghệ, giá trị cao. Thiết kế tốt sẽ giảm thời gian thi công
- Thực hiện - kiểm tra, kết thúc: Gia công, giá trị thấp.
Kiểm tra: Mọi công việc, đều cần có các điểm kiểm tra (Test point, milestone). Dựa vào các điểm này để quản lý tiến trình. Ngoài ra cũng cần dự kiến thời gian bảo hành để làm lại một công đoạn nào đó nếu chưa đạt yêu cầu(rework).

Project life

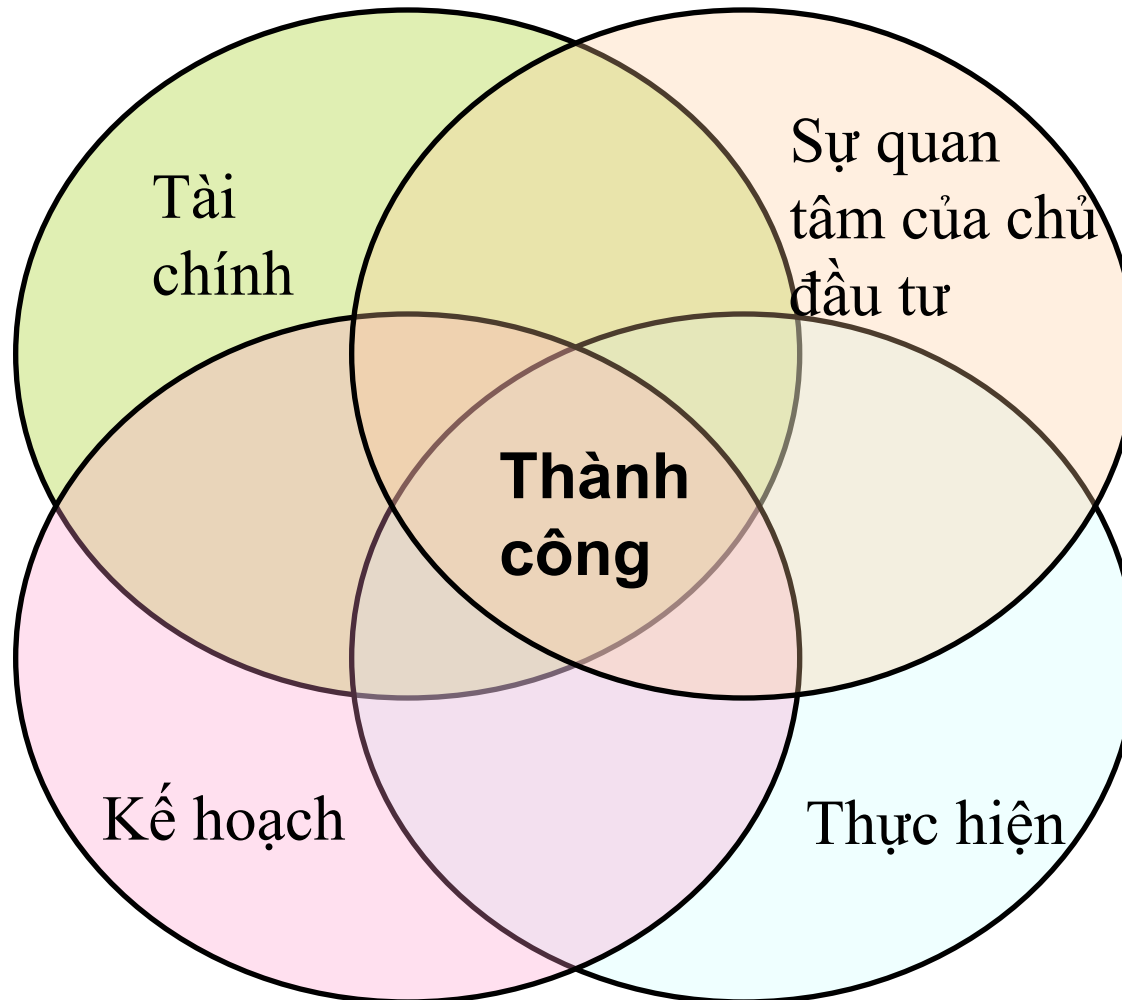
Sự thành công của dự án

- ❖ Khoảng 75% Dự án phần mềm máy tính là thất bại.
- ❖ Khoảng 2.5% doanh nghiệp đạt mức độ thành công của dự án 100%.
- ❖ Khoảng 35% doanh nghiệp thành công có sử dụng kết quả từ dự án.



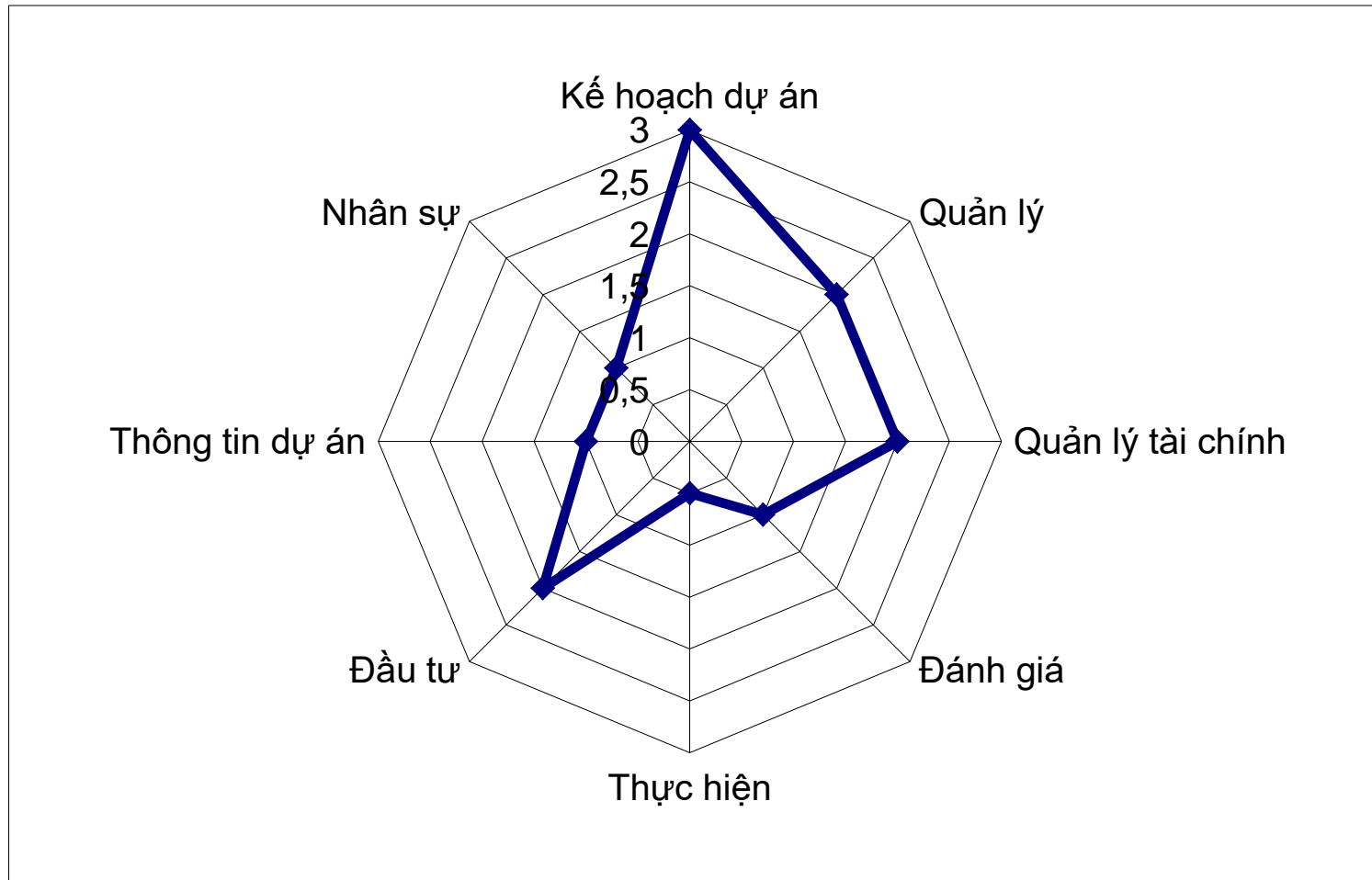
Project life

Sự thành công của dự án



Project life

Dự án phần mềm Hành chính số^(*)



(*)Số liệu giả định

Project Implement

Cấp độ thực hiện dự án

Cấp 5: Tối ưu hóa - Optimizing

Cấp 4: Quản lý chất lượng - Quality management

Cấp 3: Tiêu chuẩn hóa – Defined

Cấp 2: Kế hoạch - Managed

Cấp 1: Sự vụ - Initial

Project Implement

1. Ý tưởng

2. Thành phần dự án SOW
(Statement of Work)

3. Thông cáo dự án
(Project charter)

Kế hoạch

(phân rã công việc WBS, tài chính, thông tin, quản lý rủi ro, chất lượng)

Quản trị dự án

Kết thúc

Project Implement

1. Ý tưởng: Nghiên cứu tính khả thi

- Dự án tiền khả thi.
- Mục tiêu và đặc tính. Nếu chưa có, có thể dự báo hay giả định.

2. Thành phần dự án SOW

- Đội dự án: Tài chính, xây dựng, trang trí.
- Dự án chi tiết
 - Yêu cầu dự án
 - Giới hạn
 - Các yêu cầu
- Tài chính, tài trợ
- Giả định
- Phê duyệt.

Project Implement

3. Thông cáo dự án (Project charter)

I. Giới thiệu

- Mục tiêu
- Giới hạn
- Tham khảo

II. Thông tin tổng thể dự án

- Tên dự án
- Mô tả dự án
- Loại dịch vụ
- Giới hạn
- Khách hàng/quốc gia
- Ngày bắt đầu/Kết thúc
- Tài nguyên
- Kỹ năng yêu cầu
- Quản lý
- Địa điểm
- Email dự án.

Project Implement

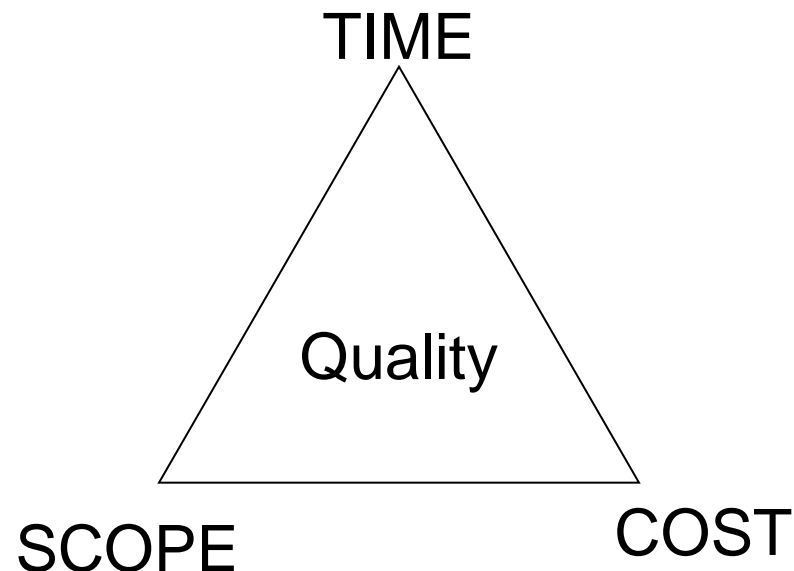
III. Yêu cầu dự án

- Project scope
- Project high level requirement

IV. Tổ chức

- Nhân sự
- Tài chính
- Các vấn đề kỹ thuật.

- ❖ Can't manage schedule and budget if scope is out of control (Triple Constraint)
- ❖ Scope docs are used to manage expectations



Project Implement

2. Kế hoạch

- Nhân sự: Quản lý, cố vấn kỹ thuật, và các thành viên.
- WBS: Chia nhỏ công việc. Ước lượng thời gian cho các nhiệm vụ dựa trên số giờ làm việc của nhân công. (có thể lấy từ dữ liệu cũ)
- Kinh phí (dựa vào thời gian)
- Kế hoạch họp đồng, quản lý rủi ro, trao đổi thông tin, chi phí, đào tạo, chất lượng...

Project Implement

Kế hoạch

1. Introduction: Purpose (của project plan), scope, reference, definitions, Acronyms and Abbreviations
2. Project overview: Purpose (của dự án), scope, deliverables, constraints
3. Project quality plan: Acceptance criteria: Đưa ra bộ chuẩn để chấp nhận được
4. Project estimation: Chính là WBS - Phân rã dự án.
5. Project budget plan: Chưa có lợi nhuận.
6. Kế hoạch nguồn lực
 1. Con người
 2. Tổ chức: Ai người giám sát, ai tham gia trực tiếp
 3. Tuyển dụng: Khi nào cần bao nhiêu người cho dự án
 4. Đào tạo: cho nhân sự của dự án

Project Implement

5. Nguồn lực không phải con người: Bảo đảm cho nhân sự làm việc, công tác phí, Phụ cấp làm việc khi đi c.tác, làm việc xa nhà.
7. Project schedule: Ví dụ biểu đồ Gantt
8. Project risk managements plan
9. Project stakeholder involvements: Ghi tên những người có liên quan đến dự án. Ví dụ giám đốc tiếp thị để họ có trách nhiệm kiểm tiền cho dự án. Hay đào tạo để họ chủ động kế hoạch đào tạo.
10. Project communication plan
 - Key contacts list
 - Communication methodology
 - Escalation mechanism
11. Other Plans.

Project Implement

Kế hoạch nguồn lực - đội dự án

❖ Đội dự án

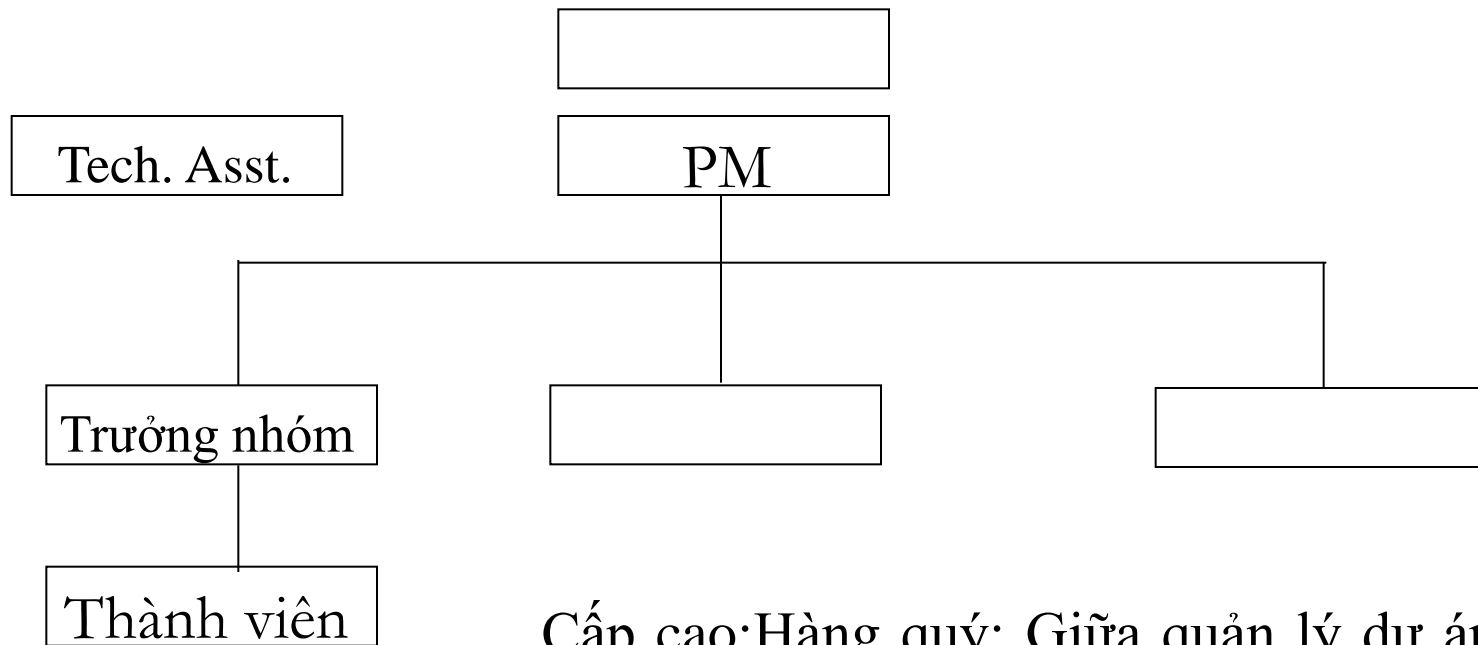
- Nhân sự từ các bộ phận
- Quan sát viên.

❖ Đội trưởng

- Có thể đối mặt với áp lực do đặc tính có thể thất bại
- Cần có kiến thức tổng quát để tập hợp các thành viên tập trung vào công việc của dự án.

Project Implement

Monitoring and controlling plan: Quản trị



Cấp cao:Hàng quý: Giữa quản lý dự án và cấp trên

Cấp trung: Giữa quản lý dự án và thành viên.

Cấp thấp: Giữa các nhóm với nhau.

Project Implement

Ước tính dự án - Phân rã nhiệm vụ

■ Kế hoạch...

■ Project estimation chính là Phân rã nhiệm vụ (Work Breakdown Structure WBS)

- Nhiệm vụ cho các thành viên
- Nhiệm vụ của các nhóm
- Các ký kết, hợp đồng và các nhà cung cấp
- Thời gian yêu cầu hoàn thành các nhiệm vụ

■ Kế hoạch ...

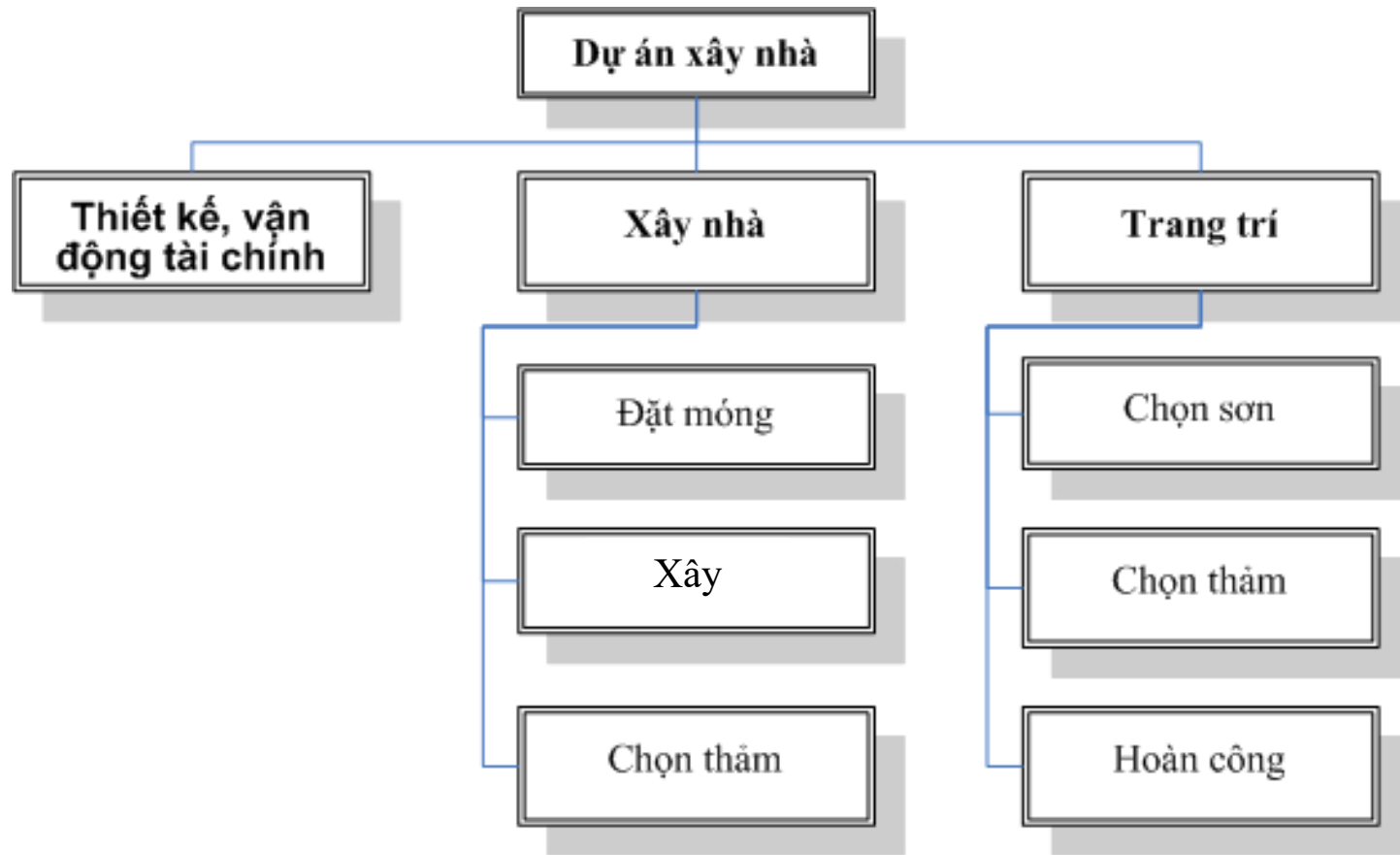
Project Implement

Kế hoạch chi tiết WBS (Work Breakdown Structure)

- Kế hoạch chi tiết được phân rã từ kế hoạch tổng thể (hình thành các modules).
- Modules sau đó được chia nhỏ thành các hoạt động, nhiệm vụ,..
- Nhiệm vụ là đơn vị cơ bản của dự án, phân nhiệm vụ giúp hạn chế trùng lặp
- Cách thức để tiến hành phân rã dự án
 1. Qui trình tuần tự
 2. Trí tuệ tập thể (Brainstorming)

Project Implement

Kế hoạch chi tiết WBS của một dự án xây nhà



Project Implement

Biểu mẫu mô tả kế hoạch chi tiết WBS

REQID	Tên	Chức năng	Tổng SF (Sub function)	Thực hiện	Thức tự
REQ001	Đẹp	Trang trí	- Chọn sơn - Chọn thảm - Hoàn công	90 man day	

Project Implement

Ma trận nhiệm vụ

- Nhiệm vụ được mô tả bằng bảng hay biểu đồ
- Quản trị dự án gán các nhiệm vụ đến các nhóm, cá nhân hay nhà thầu phụ. Ma trận mô tả việc gán các nhiệm vụ đến đối tượng được gọi là ma trận phân bổ công việc (responsibility assignment matrix RAM).

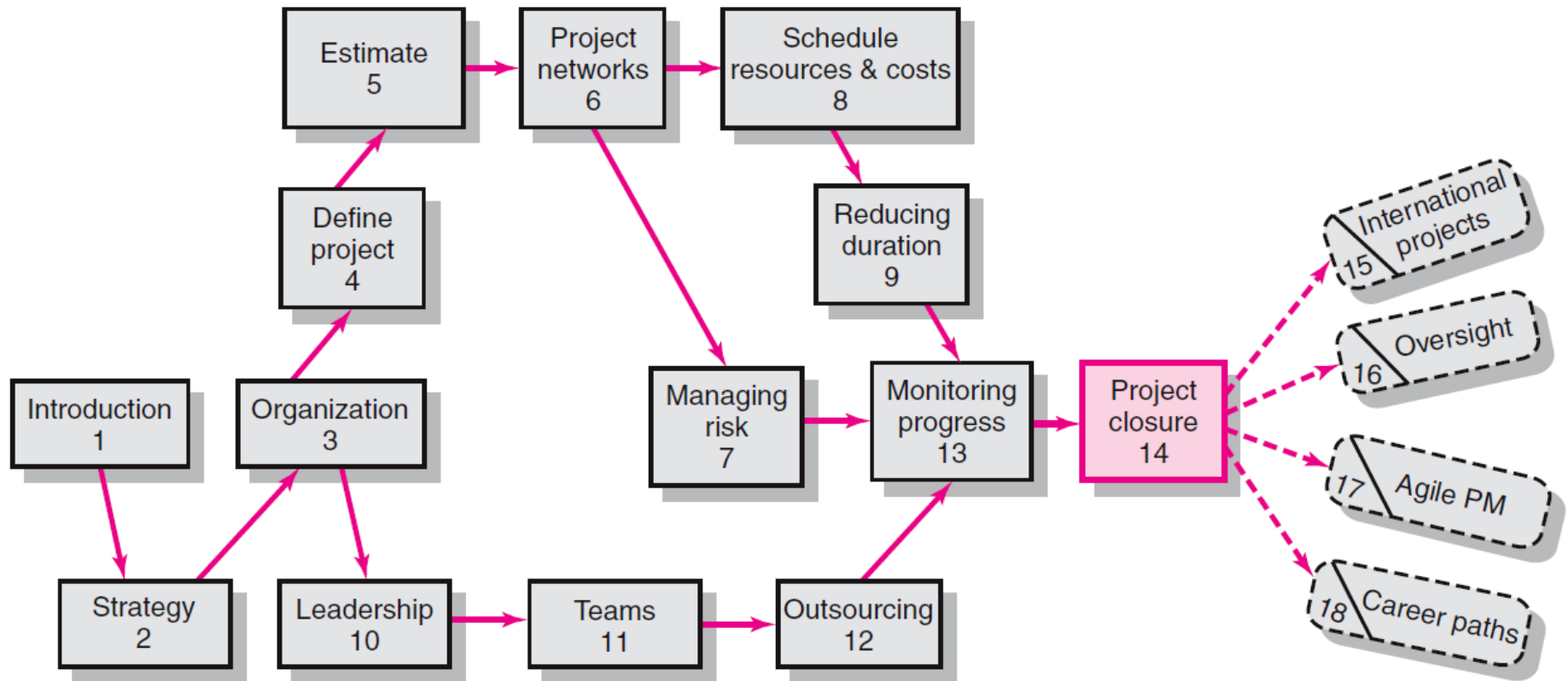
Ma trận nhiệm vụ cho yêu cầu trang trí

Đơn vị đảm trách	3.1 Chọn sơn	3.2 Chọn thảm	3.3 Hoàn công
Chồng			2
Vợ	1	1	1
Vật liệu xây dựng	3	3	3
Nhà thầu	2	2	2

(*)Mức độ đáp ứng: 1: Tổng thể, 2: Thực hiện, 3: Hỗ trợ, cung cấp

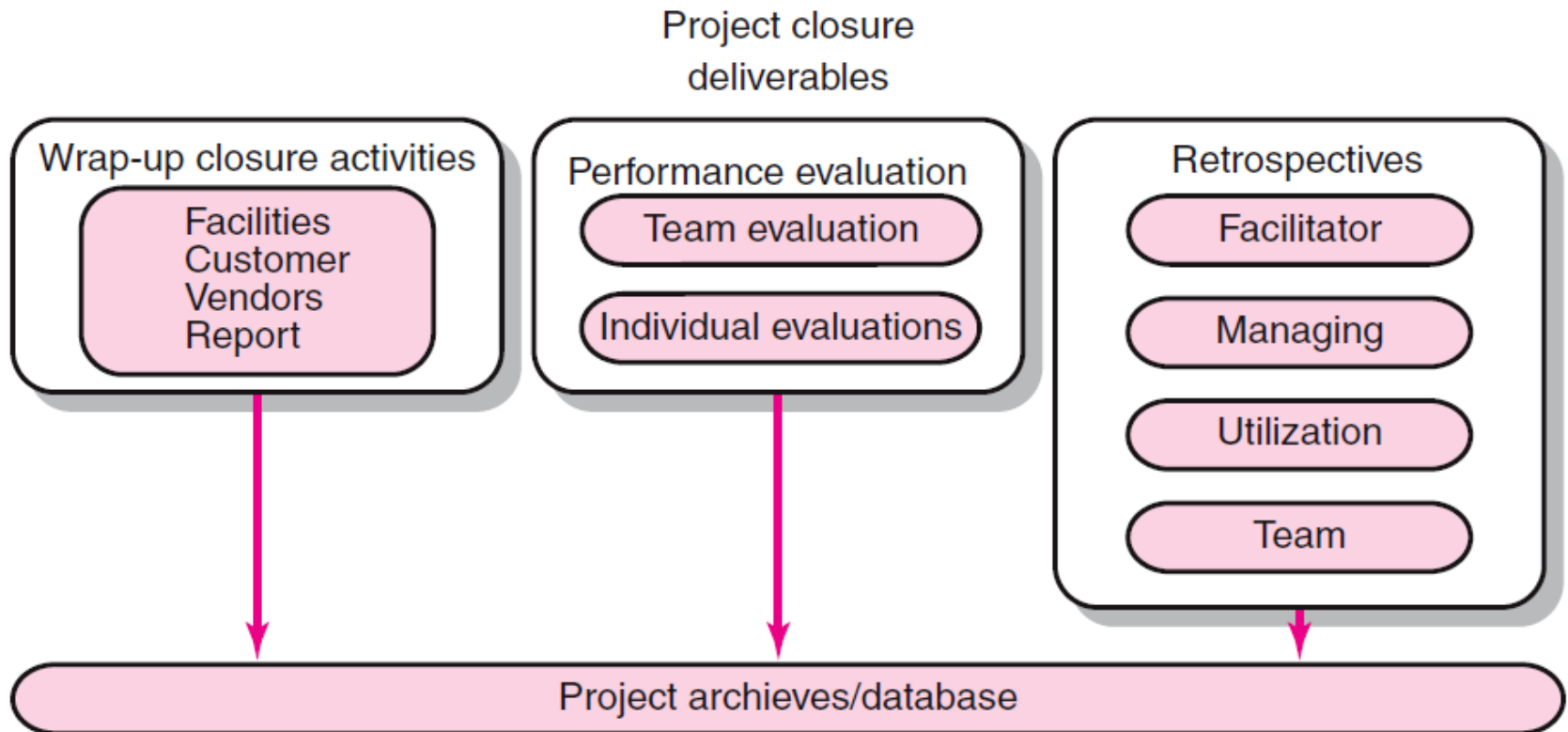
Project Closure

Where we are now



Project Closure

Review Deliverables



Key Terms

Lessons learned

Organization evaluation

Performance review

Project closure

Project evaluation

Project facilitator

Retrospective

Team evaluation

360-degree review

Project Closure

Types of Project Closure

- Normal
- Premature
- Perpetual
- Failed Project
- Changed Priority



Project Closure

Steps to Closing a Project

1. Get client acceptance of deliverables.
2. Documenting the Project.
3. Conducting the Post-Implementation Audit.
4. Writing final report.
5. Retrospectives.



Getting Client Acceptance

- The client decides when the project is done.
- It is your job as the project manager to demonstrate that the deliverables (whether products or services) meet client specifications.
- For small projects, this acceptance can be very **informal and ceremonial**,
- Or it can be very **formal**, involving extensive acceptance testing against the client's performance specifications.

Getting Client Acceptance

The process of writing and maintaining client acceptance test procedures:

- begins during requirements gathering,
- is documented during project planning,
- is maintained during project execution, and
- is applied as the only criteria for moving to the project Closing Phase.

Getting Client Acceptance

Ceremonial acceptance is an informal acceptance by the client. It does not have an accompanying sign-off of completion or acceptance. It simply happens.

Formal acceptance occurs in projects for which you and the client have written an acceptance test procedure (ATP). A checklist is used and requires a feature-by-feature sign-off based on performance tests.

Documenting the Project

There are at least five reasons why you need to write documentation:

1. Reference for future changes in deliverables: for the follow-up projects.
2. Historical record for estimating duration and cost on future projects, activities and tasks
3. Training resource for new project managers: Such items as how the Work Breakdown Structure (WBS) was determined
4. Input for further training and development of the project team: such as How a similar problem or change request was handled in the past
5. Input for performance evaluation by the functional managers of the project team members

Documenting the Project

The Project Notebook

- POS
- RBS and all revisions
- Proposal and backup data
- Original and revised project schedules
- Minutes of all project team meetings
- Copies of all status reports
- Design documents
- Copies of all change notices
- Copies of all written communications
- Outstanding issues reports
- Final report
- Sample deliverables (if appropriate)
- Client acceptance documents
- Post-implementation audit report

NOTE:
Start the project notebook on the first day

Conducting the Post-Implementation Audit

The post-implementation audit is an evaluation of the project's goals and activity achievement as measured against the project plan, budget, time deadlines, quality of deliverables, specifications, and client satisfaction.

The following six important questions should be answered:

1. Was the project goal achieved?
 - Does it do what project team said it would?
 - Does it do what client said it would?
2. Was the project work done on time, within budget, and according to specification?

Conducting the Post-Implementation Audit

3. Was the client satisfied with the project results?
 - It is possible that the answers to the first two questions are yes, but the answer to this question is no. How can that happen? Simple: the Conditions of Satisfaction (COS) changed, but no one was aware that they had.
4. Was business value realized?
 - Check success criteria: such as improvement in profit or market share
5. What lessons were learned about your project management methodology?
 - Different parts of the methodology may work well for certain types of projects or in certain situations
6. How well did the team follow the methodology?

Conducting the Post-Implementation Audit

Reasons for Poor-Quality Project Performance Evaluations:

- Evaluations of individuals are left to supervisors of the team member's home department.
- Typically measure team performance only on time, cost, and specifications.



Conducting the Post-Implementation Audit

Post-Implementation Conditions: Team

- Are standards and goals for measuring performance clear, challenging, and attainable? Lead to positive consequences?
- Are responsibilities and performance standards known by all team members?
- Are team rewards adequate? Management believes teams are important?
- Is there a career path for successful project managers
- Does the team have discretionary authority to manage short-term difficulties?
- Is there a high level of trust within the organization culture?
- Are there criteria beyond time, cost, and specifications?

Conducting the Post-Implementation Audit

Sample Team Evaluation and Feedback Survey

	Disagree			Agree	
<i>Using the scale below, assess each statement.</i>					
1. The team shared a sense of common purpose, and each member was willing to work toward achieving project objectives.	1	2	3	4	5
2. Respect was shown for other points of view. Differences of opinion were encouraged and freely expressed.	1	2	3	4	5
3. All interaction among team members occurred in a comfortable, supportive atmosphere.	1	2	3	4	5

Conducting the Post-Implementation Audit

Project Performance Evaluation: Individual

Performance Assessment Responsibilities:

- Functional organization or functional matrix: the individual's area manager.
 - The area manager may solicit the project manager's opinion of the individual's performance on a specific project.
- Balanced matrix: the project manager and the area manager jointly evaluate an individual's performance.
- Project matrix and project organizations: the project manager is responsible for appraising individual performance.

Conducting the Post-Implementation Audit

Conducting Performance Reviews

- ❑ Begin by asking the individual to evaluate his or her own performance.
- ❑ Avoid drawing comparisons with other team members; rather, assess the individual in terms of established standards and expectations.
- ❑ Focus criticism on specific behaviors rather than on the individual personally.
- ❑ Be consistent and fair in treatment of all team members.
- ❑ Treat the review as one point in an ongoing process.

Conducting the Post-Implementation Audit

Individual Performance Assessment

Multirater appraisal (“360-degree feedback”)

- Involves soliciting feedback concerning team members’ performance from all of the people that their work affects.
- Project managers, area managers, peers, subordinates, and customers.



Project Process Review Questionnaire

1. Were the project objectives and strategic intent of the project clearly and explicitly communicated?
2. Were the objectives and strategy in alignment?
3. Were the stakeholders identified and included in the planning?
4. Were project resources adequate for this project?
5. Were people with the right skill sets assigned to this project?
6. Were time estimates reasonable and achievable?
7. Were the risks for the project appropriately identified and assessed before the project started?
8. Were the processes and practices appropriate for this type of project? Should projects of similar size and type use these systems? Why/why not?
9. Did outside contractors perform as expected? Explain.
10. Were communication methods appropriate and adequate among all stakeholders? Explain.
11. Is the customer satisfied with the project product?
12. Are the customers using the project deliverables as intended? Are they satisfied?
13. Were the project objectives met?
14. Are the stakeholders satisfied their strategic intents have been met?
15. Has the customer or sponsor accepted a formal statement that the terms of the project charter and scope have been met?
16. Were schedule, budget, and scope standards met?
17. Is there any one important area that needs to be reviewed and improved upon? Can you identify the cause?

Organizational Culture Review Questionnaire

1. Was the organizational culture supportive for this type of project?
2. Was senior management support adequate?
3. Were people with the right skills assigned to this project?
4. Did the project office help or hinder management of the project?
Explain.
5. Did the team have access to organizational resources (people, funds, equipment)?
6. Was training for this project adequate? Explain.
7. Were lessons learned from earlier projects useful? Why? Where?
8. Did the project have a clear link to organizational objectives?
Explain.
9. Was project staff properly reassigned?
10. Was the Human Resources Office helpful in finding new assignments? Comment.

Conducting the Post-Implementation Audit

Reasons for not doing a post-implementation audit

- Managers don't want to know
- Managers don't want to pay the cost
- It's not a high priority
 - Other projects are waiting to have work done on them, and completed projects don't rate very high on the priority list.
- There's too much other scheduled work to do.

Creating the Final Report

- Executive Summary
- Overall success and performance of project
- Organization and administration of project
- Techniques used to accomplish results
- Strengths and weaknesses of the approach
 - What features, practices, and processes proved to be strengths or weaknesses?
- Recommendations
- Appendices
 - POS, WBS
 - Resource Schedule
 - Change Requests
 - Final Deliverables
 - Other ..

Creating the Final Report

Executive Summary

- Project goals met/unmet
- Stakeholder satisfaction with project
- User reactions to quality of deliverables

Analysis

- Project mission and objective
- Procedures and systems used
- Organization resources used

Recommendations

- Technical improvements
- Corrective actions

Lessons Learned

- Reminders
- Retrospectives

Appendix

- Backup data
- Critical information

Retrospectives

Lessons Learned

- An analysis carried out during and shortly after the project life cycle to capture positive and negative project learning—“what worked and what didn’t?”

Goals of Retrospectives

- To reuse learned solutions
- To stop repetitive mistakes.



Retrospectives

Barriers to Organizational Learning

- Lack of post-project time for developing lessons
- No post-project direction or support for teams
- Lessons become blame sessions
- Lessons are not applied in other locations
- Organizational culture does not recognize value of learning



Retrospectives

Making Retrospectives Effective:

- Use an independent facilitator to guide the project team through the analysis project activities.
- Include a minimum of three in-process learning gates during the life project cycle.
- Designate a team member as owner for each point in the retrospective.
- Develop an easy-to-use learning repository to ensure future utilization of retrospective lessons.
- Mandate use of retrospectives as part of the normal process for all projects.

Retrospectives

Characteristics of a Facilitator

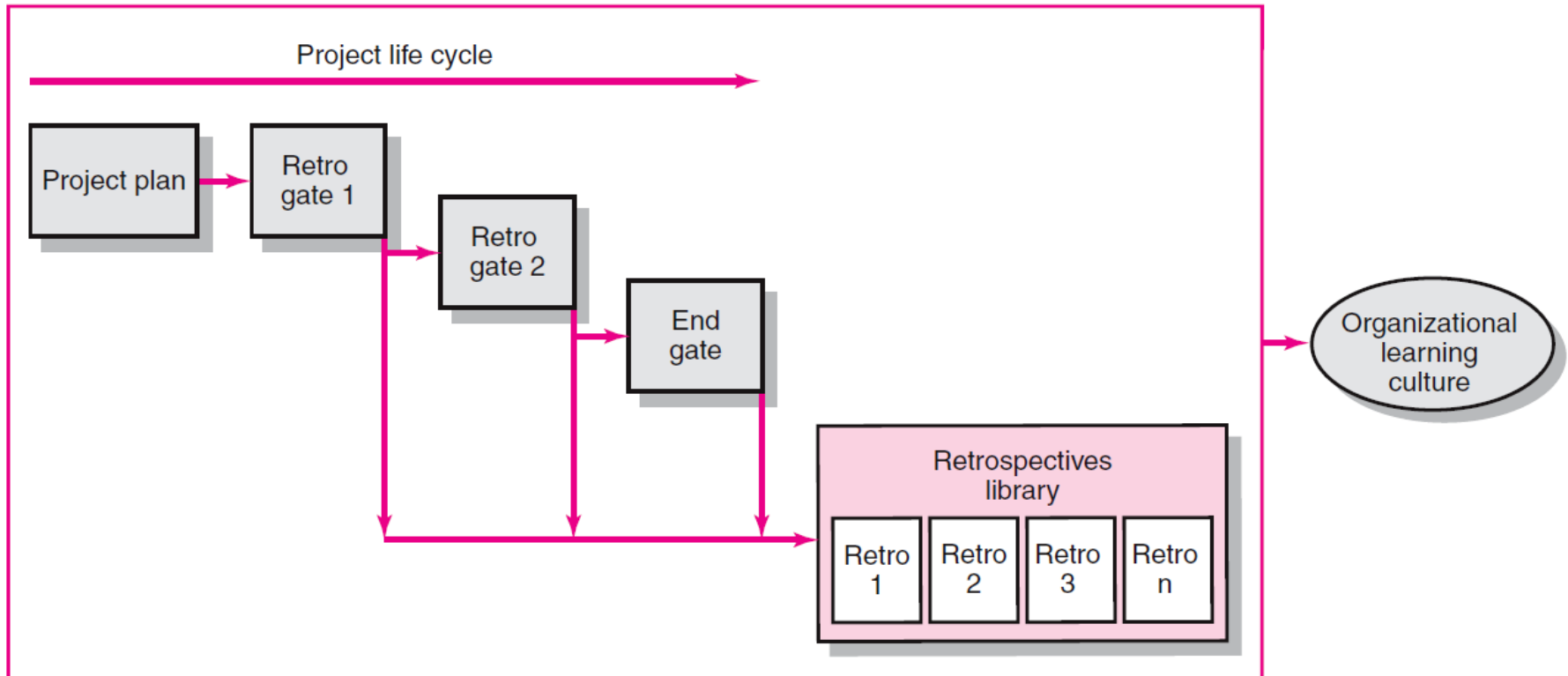
1. No direct involvement or direct interest in the project.
2. Perceived as impartial and fair
3. Respect of senior management and other project stakeholders.
4. Willingness to listen.
5. Independence and authority to report results without fear of recriminations from special interests.
6. Perceived as having the best interests of the organization in making decisions.
7. Broad-based experience in the organization or industry.

Initiating the Retrospective Review

- Have automatic times or points when reviews will take place. Avoid surprises.
- Conduct reviews carefully and with sensitivity
- Review staff must independent from the project.
- Review reports need to be used and accessible.
- Reviews support organizational culture
- Project closures should be planned and orderly.
- Certain “core conditions” must be in place to support team and individual evaluation.
- Conduct individual and team evaluations separate from pay or merit reviews.

Retrospectives

The Retrospectives Process



Retrospectives

Conducting a Retrospective Analysis

- ❑ Initiation and Staffing
- ❑ Data Collection and Analysis
- ❑ Reporting.



Archiving Retrospectives

Classifying of Projects:

- Project type
- Size
- Staffing
- Technology level
- Strategic or support
- Issues and problems
- Project mission and objectives
- Procedures and systems used
- Organization resources used



Retrospectives

Celebrating Success

- There must be some recognition for the project team at the end of the project.
- Don't pass up an opportunity to show the team your appreciation. This simple act on the part of senior management promotes loyalty, motivation, and commitment in their professional staff.



Project Closeout Checklist

	Item	Status	Comments/Plan to Resolve
1	Have all the product or service deliverables been accepted by the customer?		
1.1	Are there contingencies or conditions related to the acceptance? If so, describe in the Comments.		
2	Has the project been evaluated against each performance goal established in the project performance plan?		
3	Has the actual cost of the project been tallied and compared to the approved cost baseline?		
3.1	Have all approved changes to the cost baseline been identified and their impact on the project documented?		
4	Have the actual milestone completion dates been compared to the approved schedule?		
4.1	Have all approved changes to the schedule baseline been identified and their impact on the project documented?		
5	Have all approved changes to the project scope been identified and their impact on the performance, cost, and schedule baselines documented?		

(Continued)

Euro Conversion— Project Closure Checklist

Project Euro Conversion

Customer Finance Department

Project manager Hans Kramer

Completion date 12 December XX

	Due date	Person responsible	Notes
1. Document finance department acceptance	16/12	Hans	
2. Customer training in Euro software	28/12	Joan	Train all departments before conversion
3. Archive all			
Schedules/actuals	31/12	Maeyke	
Budgets/actual costs	31/12	Maeyke	
Changes	31/12	Maeyke	
4. Close out all accounts with vendors	31/12	Guido	
5. Close out all work orders	31/12	Mayo	
6. Close out partner accounts	31/12	Guido	
7. Reassign project staff	16/12	Sophie	
8. Evaluation of			
Vendors	31/12	Mayo	Use standard questionnaire for vendors
Staff members	31/12	Sophie	Have HR department develop and administer
9. Final report and lessons learned meeting	4/1	Hans	Send notice to all stakeholders
10. Lessons learned archive to database	10/1	Maeyke	Contact IS department
tribute awards		Sophie	Notify all stakeholders