

Project Management

Planning for Successful Project Execution

The Project Management Institute defines a *project* as a temporary endeavor undertaken to create a unique product, service, or result.

One of the primary prerequisites to successful project execution is strong effective planning. Projects are planned not only for the purpose of sequencing and estimating work activities but also to develop a way by which to measure performance over the life of that effort by monitoring, controlling, and measuring what was plan. However, in 2010 the Standish Group published a report indicating that approximately 68% of projects failed to succeed. This implies that on occasion effective planning is sometimes ignored in favor of moving an effort forward. Some reasons why the majority of projects failed to succeed might include:

- Poorly defined requirements
- Unrealistic expectations
- Lack of communication
- Insufficient resources
- Inadequate design
- Scope creep

A successfully executed project shifts more time and resources into earlier phases. This does require additional resources and investment earlier in the life cycle from project managers, business owners, and governance for the review and approval of planning activities. However, over the life of a typical project, this increased investment in planning is often more than offset by returns gained from reduced resources spent on duplicating efforts, reworking avoidable errors, efficient execution of activities, prevention of avoidable issues/problems, and increased deliverable quality. The Department of Health and Human Services Enterprise Performance Life Cycle encourages this by providing a framework that outlines some of the planning inputs that should be completed prior to starting any project execution phase(s).

Business Needs Statement – A Business Needs Statement identifies the business need for a proposed investment or project. It includes a brief description of the proposed project’s purpose, goals, and scope. The Business Needs Statement should provide enough sufficient information to justify a decision whether or not an organization should move forward with the development of a full business case.

Business Case – Once a Business Need has been identified, the Business Case assists stakeholders in making decisions regarding the viability of a proposed investment. It is a documented, structured proposal for business improvement that is prepared to facilitate a selection decision for a proposed project by organizational decision makers. The Business Case describes the reasons and justification for the project in terms of business process performance, needs and/or problems, and expected benefits. It identifies the high-level requirements that are to be satisfied, includes an analysis of proposed alternative solutions (with reasons for rejecting or carrying forward each option), assumptions, constraints, a risk-adjusted cost-benefit analysis, and preliminary acquisition plan.

Project Charter – The Project Charter formally authorizes a project, describes the business need for the project, and the product to be created by the project. The charter also provides the project manager with the authority to apply up to a certain level of organizational resources to project activities.

Project Management Plan (PMP) and components - The Project Management Plan is a dynamic formal approved document that defines how the project is executed, monitored, and controlled. It may be summary or detailed and may be composed of one or more subsidiary management plans and other planning documents. The main objective of the PMP is to document assumptions and decisions for how

the project is to be managed, to help in communication between all of the concerned parties and to document the scope, cost, and time sequencing of the project.

HHS uses the PMP as the principal tool for organizing and managing IT projects throughout the EPLC. The PMP establishes the baselines and benchmark activities that project performance will be reported and tracked against. Project managers keep the PMP current by updating its subordinate-level plans as required to reflect changes and refinements during the life cycle.

Project Process Agreement - The Project Process Agreement defines how the EPLC is to be tailored by specifying project deliverables and their expected levels of detail, and documents the justification for tailoring EPLC elements. It is used to authorize and document the justifications for using, not using, or combining specific Stage Gate Reviews and the selection of specific deliverables applicable to the investment/project, including the expected level of detail to be provided.

Integrated Baseline Review - During the Integrated Baseline Review, the IT Governance organization examines whether scope, cost, and schedule that have been established for the project are adequately documented and that the project management strategy is appropriate for moving the project forward in the life cycle.

Once a project is ready to move on to executing planned project activities some of the goals of this life cycle phase include:

- Controlling scope, schedule, and cost by monitor the critical path of scheduled activities; effectively managing any schedule float/slack; recognizing the capacity of available resources and keeping utilization expectations realistic; performing earned value calculations and respond to variances from planned baselines.
- Minimizing risk by using existing assets, standards, methods, and systems, to improve accountability and internal controls; planning risk mitigation strategies, developing contingency plans, and understanding risk triggers while actively monitoring and controlling identified risks.
- Managing stakeholder expectations by delivering work products that meet customer expectations while using agreed upon standards, metrics, checklists, templates, etc.
- Keeping lines of communication open; regularly interacting with stakeholders as planned; making you available and responding in a timely manner

to information inquiries.

- Delivering quality by producing work products that meet agreed upon quality standards and customer expectations.

Portions of this newsletter were paraphrased from a presentation by Kevin Lyday, PMP CISSP, CIPP/G during the June 2010 meeting of the CDC Project Management Community of Practice (PMCoP) and from the HHS Enterprise Performance Life Cycle Framework (EPLC). For more information on the PMCoP, or the CDC Unified Process please visit the CDC UP website at <http://www.cdc.gov/cdcup/>. ■

Project Management Community of Practice

- **September 24, 2010**
Effective Stakeholder Communication
- **October 29, 2010**
Leadership and Mentoring
- **December 10, 2010**
Managing Projects in a virtual World

For more information on the Project Management Community of Practice visit the PMCoP website at <http://www2.cdc.gov/cdcup/library/pmcp/> ■

CDC Unified Process Presentations

The CDC UP offers a short overview presentation to any CDC employee and/or contractor group, upon your request. Presentations are often performed at your facility, on a day of the week convenient for your group, and typically take place over lunch structured as 1-hour brown bag/lunch-and-learn style meeting.

Contact the CDC Unified Process at cdcup@cdc.gov or visit <http://www.cdc.gov/cdcup> to arrange a short overview presentation for your group. ■

Contact the CDC Unified Process

The *CDC Unified Process Project Management Newsletter* is authored by Daniel Vitek, MBA, PMP and published by the Office of Surveillance, Epidemiology, and Laboratory Services.

For questions about the CDC UP, comments regarding this newsletter, suggestions for future newsletter topics, or to subscribe to the CDC UP Project Management Newsletter please contact the CDC UP Team at cdcup@cdc.gov

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