



Project Management: Leveraging Technology and Utilizing Resources

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Road Map

- Why Project Management?
- Identifying Projects
- Building a Business Case
- Making Milestones
- Managing Go Live
- Bringing the Project to a Close




Why Project Management?

- Managing change through projects allows for well-organized and well-communicated business process creation or transformation.
- In 2019, almost all new business processes will require some form of technology to be thoughtfully integrated.


Where Does Technology Come Into Play?

- Good project management helps protect resources and ensure that technology is integrated in an intentional and efficient manner.
- When considering improvements to a business process in your department ask yourself:
 - Could a computer do this work for me?
 - What parts of this process could be automated?
 - Can technology offer greater accuracy?



Identifying a Project: What is the Problem?

- We all have problems:
 - Existing procedures or processes that are inefficient or outdated.
 - Business processes that are not student-service centered.
 - New systems that need to be implemented intentionally.
- **Take some time to think about outdated procedures in your own office that do not serve students most effectively, or where a new system implementation is needed.**



Does This Problem Lend Itself to Project Management?

- Using a Decision Matrix can help identify if your problem is ideally solved by creating a project.
 - It could be that your problem does not need an entire project to be solved.
- It can additionally help you prioritize any projects that you do identify.

Project Name		Sample Problem #1	Sample Problem #2
Number of Students Impacted	5- all 3- half 1-few		
Number of Offices Impacted	5- all 3- half 1-few		
Foundational to Office's Function	10- critical 7- pressing 4- need		
Critical Deadline / Legislation / Compliance Issue	10 - < 3 mo 7 - < 6 mo 4 - < 12 mo		
New Automation	5- yes 3- partial 0-no		
Alignment with CU Mission	10- yes 5-partial 0-no		
Total Points			
Resources Required: Human, IT/Software, Monetary			



Caveat #1

- Not all problems lend themselves to full-blown projects!
- Sometimes a problem or issue can be solved on a much smaller scale.
- For these types of mini-projects, especially those that do NOT require input from IT resources outside of your office, it can be ideal to utilize tools like executive summaries and timelines on their own.



Exploring Solutions

- Explore ALL possible solutions to a problem, not just those that have occurred to you personally or that you prefer.
- Take time to explore the problem with teammates and coworkers, maybe host some initial conversations with key stakeholders. Multiple perspectives are best!
- This strengthens your case as you explain to other stakeholders and project team members why the proposed solution is optimal.



Building a Business Case

- This is the written form of your project plan. This document steers your project and holds you and other project team members accountable.
- Ask yourself: If you do not have all expectations and deadlines outlined how will you communicate **what** needs to be done, **when** it needs to be done and **why** it needs to be done to others?

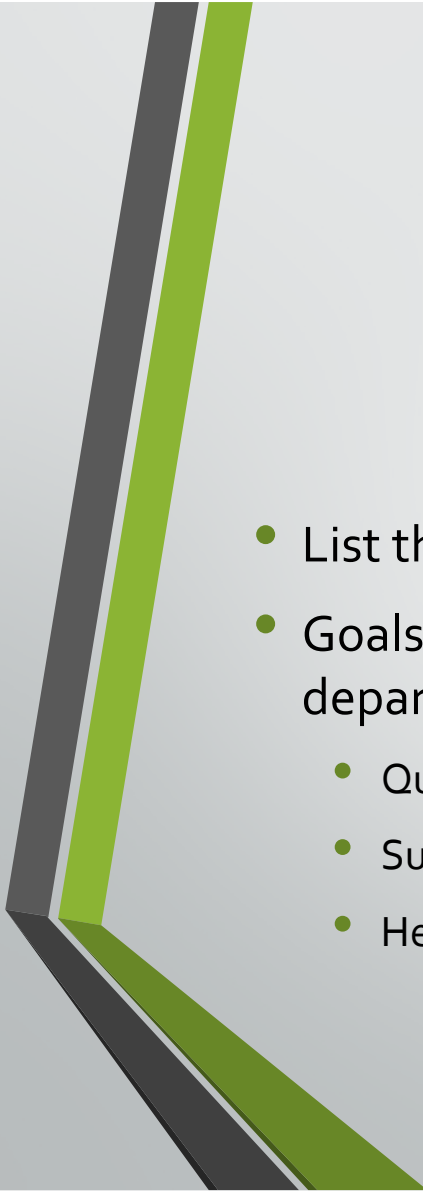


Business Need/Problem/Opportunity

- High level statement of the problem or opportunity.
- Defines the gap between the current state and desired state of the business process. Define how the current process is not working well.
- Indicate if this is a legislative, compliance, or accreditation requirement.
- Usually needed prior to project approval.

Proposed Solution

- Your audience agrees there's a problem/opportunity, now you have to paint a picture of what an improved business process looks like.
- Address all solutions that were explored, if more than one.
- Describe the recommended proposed solution in detail.
 - Who and how did you gather feedback from stakeholders to determine the recommend solution?
 - How does the solution support the problem?
 - What are the benefits? Who is benefited?
- Could include:
 - Process changes – flow chart (process map) comparing current process to proposed solution
 - Coding/System changes



Goals & Objectives

- List the key performance goals and objectives of the proposed solution.
- Goals should be measurable, attainable, and support the mission of the department.
 - Quantitative and qualitative measurements
 - Supports buy in from others
 - Helps identify when the project is a success and communicating with stakeholders

Stakeholders

- Identifying stakeholders gives you a complete picture of who it is you need to be in communication with in order to have a successful project come to fruition.
 - Who does this project touch directly?
 - Whose help does this project require? (Does this project require IT expertise?)
 - Whose business practices might be impacted by what this project changes?

Timeline

- Timelines are an order of events or actions needed to complete a project by a specific date or time of year.
 - Allow for the unexpected or unforeseen to happen that could impact the projects timeline
 - Helpful in communicating when support is needed from stakeholders
- Timeline tools
 - Simple calendar
 - Gantt chart
 - Microsoft/Excel



Milestones

- Milestones are identified completion steps within the project timeline.
- Milestones help keep stakeholders engaged and monitor progress.
 - Communicate
 - Celebrate

Executive Summary

- The 30,000 ft view of the project. Someone who does not need to know all the fine details should be able to read the executive summary and understand:
 - The main problem
 - The proposed solution
- Placed at the beginning of your Business Case but written last

Caveat #2

- This session will not address cost or risk management aspects of project management.
- For more information about how to integrate cost/budget and risk management into a project plan we recommend the [*Project Management Foundations: Budgets*](#) and [*Project Management Foundations: Risk*](#) courses from Lynda.com.



Managing the Go Live

- The “go live” is the launch of your product or project outcome. Go live is the date or time when your technological solution is launched and available to the intended end-user.





Managing the Go Live

- Communication!
- Test, Test, Test and then Test Again
- Set expectations and responsibilities
- Offer appropriate support day-of, week-of and ongoing

Bringing the Project to a Close

- Communication!
- Prepare for project evaluation
 - Survey stakeholders/end users
 - Gather metric data based on the project's measurable goals
- Create and distribute project summary
- Prepare for 2.0

Questions?



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