ORTEC@BUES

Project Management

(in the real life)

Matteo Mazzoleni

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Agenda

01 Project Basic Concepts

02 Project Fundation

03 Project Execution

04 Project Deployment

05 Training Closure

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Let me introduce myself

- 15+ years of experience in Project Management

- Different Industries

- Multinational Customers

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OPTIMIZE YOUR WORLD

Matteo Mazzoleni

Operations Manager

ORTEC s.r.l.
Via Pasubio 5
24044 Dalmine
Italy

Tel. +39 3929293007
matteo.mazzoleni@ortec.com

www.ortec.com

Who are you?

What are your learning goals?

How much experience do you have with PM?

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Ask question and Be Curious
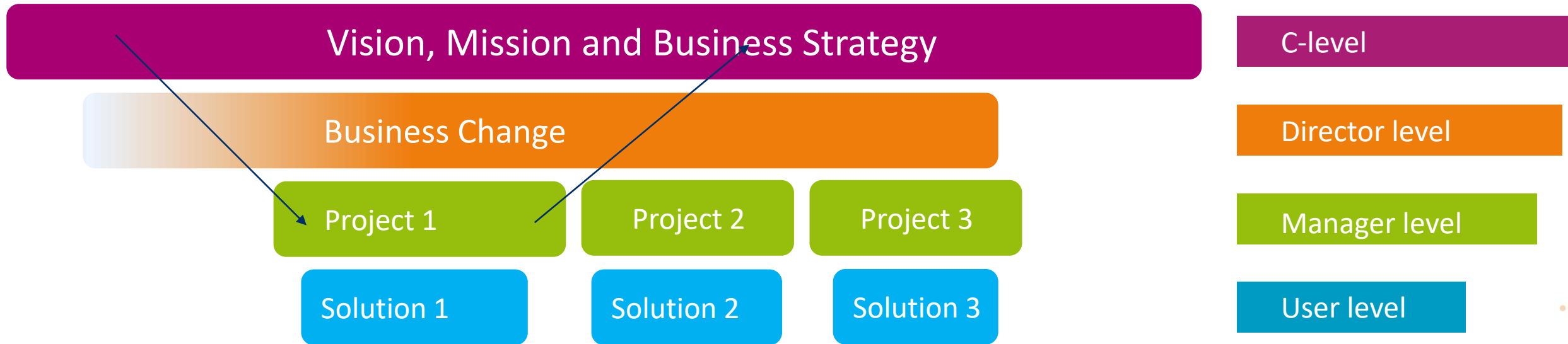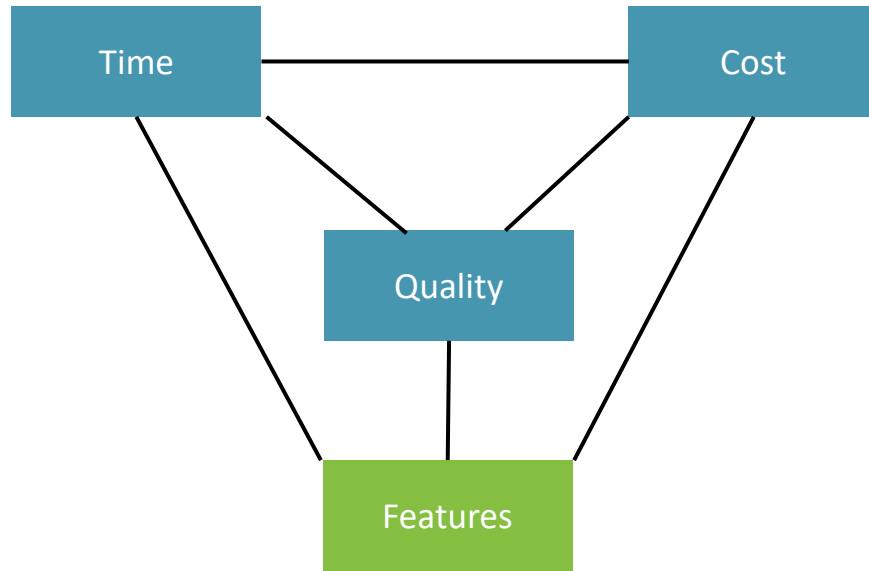
Participate and be Involved

Bi-directional Discussion

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01

Project Basic Concepts

Let's introduce some foundation topics

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Why do we decide to start a project?

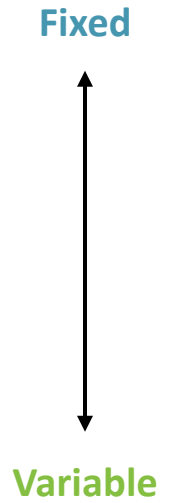| Vision, Mission and Business Strategy | | | C-level |
Business Change			Director level
Project 1	Project 2	Project 3	Manager level
Solution 1	Solution 2	Solution 3	User level

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Introduction to Projects
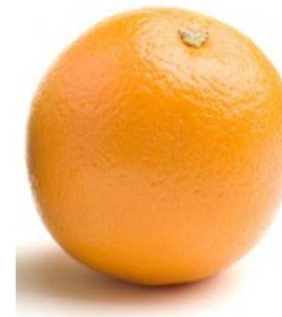

Agile

Waterfall
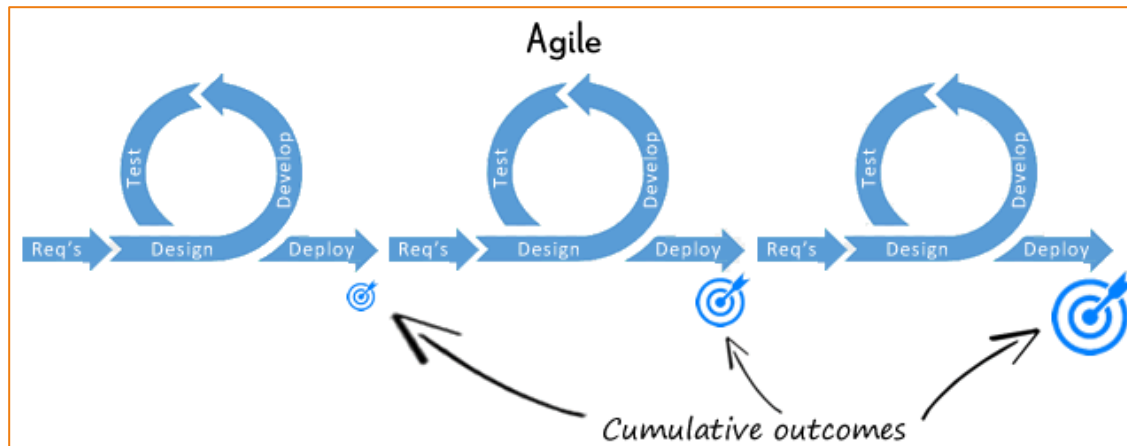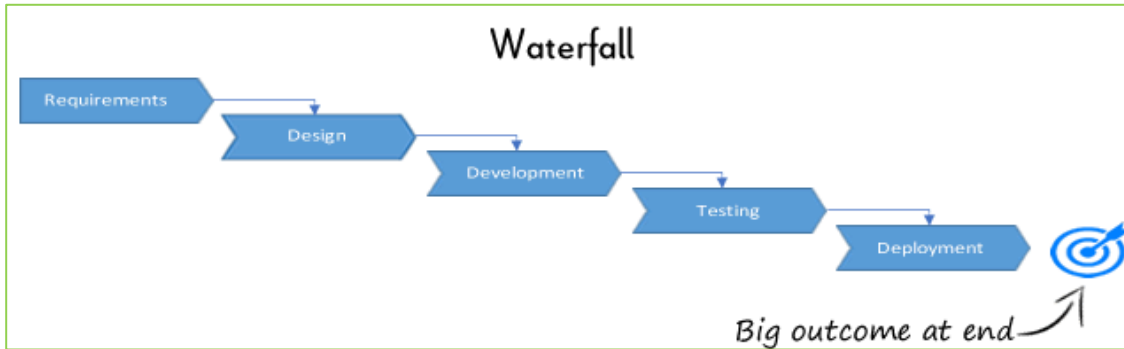
Fixed

Variable

ORTEC Project Management Methodology

ORTEC Project Management Methodology

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ORTEC Project Management Methodology

Foundation

Construction

Deployment

Project Initiation

Solution Assessment

1. Prioritize requirements

2. Analyze & design

3. Develop & configure

4. Test & integrate

Go-Live

Evaluate & Next Steps
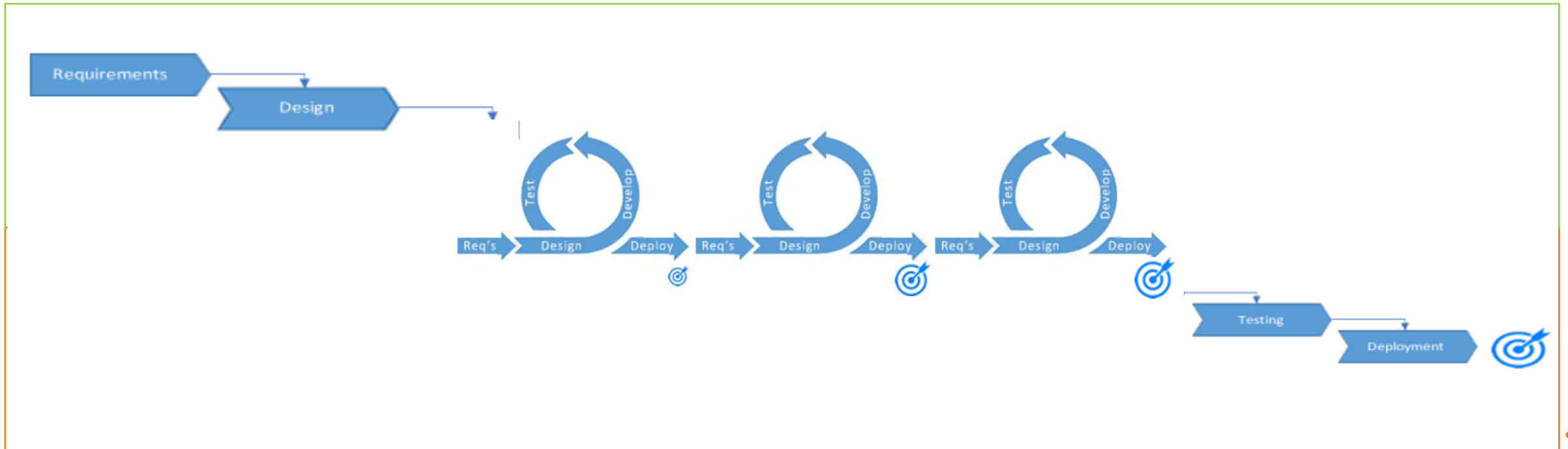
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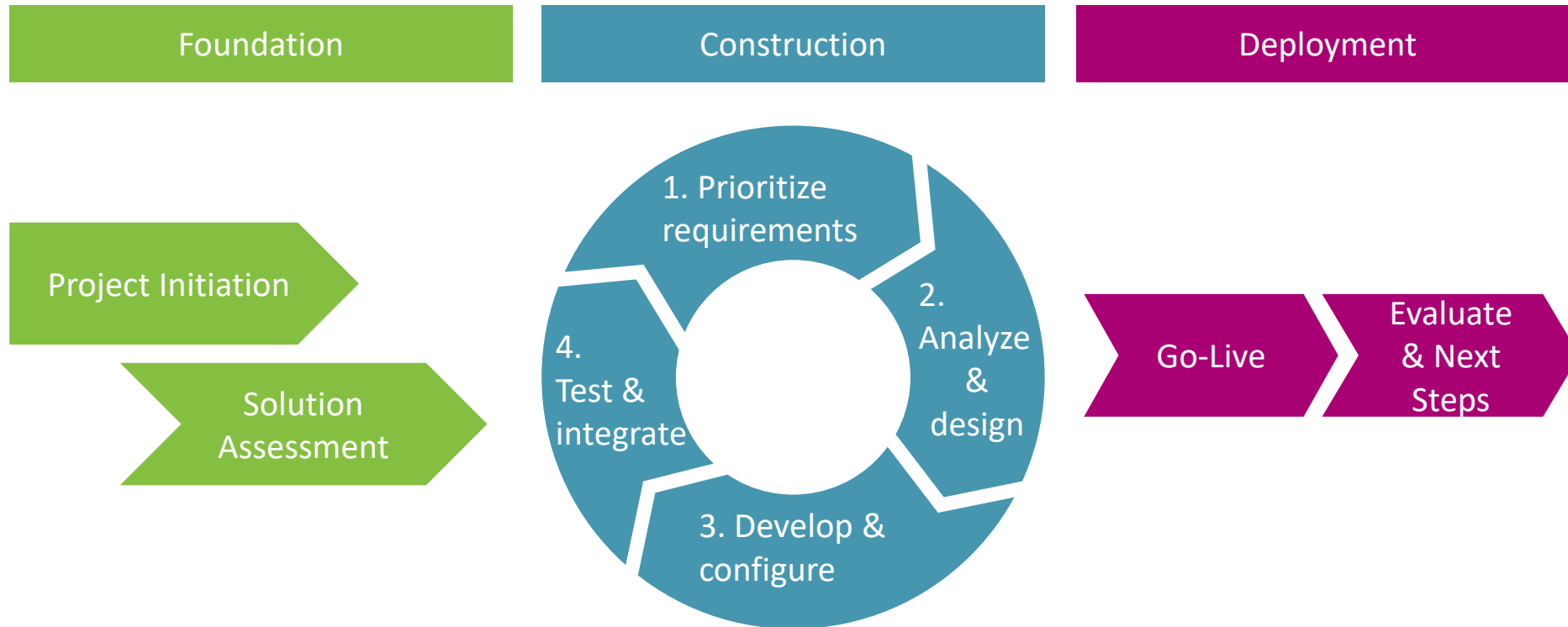
All kinds of Projects

- Proof of Concept

- Study

- Implementation project

- Tailor-made solution

- Capability building

- Small vs. big projects

- Easy vs. complex projects

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Project Organization

- The steering group is focusing on business value and investments (budgets)

- The project level is focusing on the solution and delivery.

- Translation between levels is needed

Different perspectives – Steering level vs. Project level

Steering Level			
Project Sponsor	Business Stakeholder	Technical Stakeholder	Senior ORTEC

Project Level			
Project Manager	Solution Developer	Business Advisor	Technical Advisor

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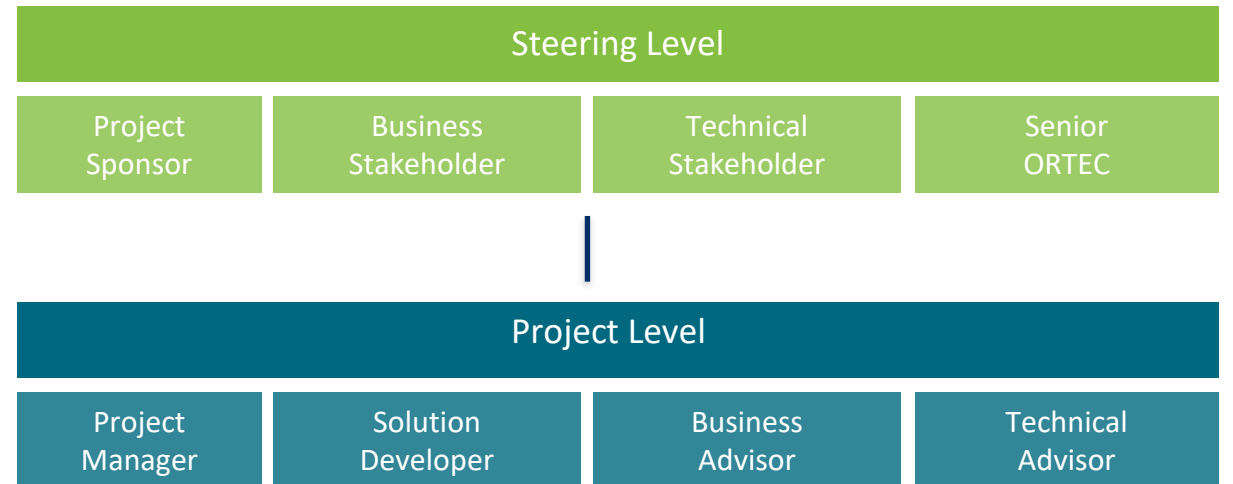
Project Principles

Transparency & Clarity

Transparent and open communication on status of financials, planning, scope, risks and issues

Clear Roles & Responsibilities

Roles & responsibilities are clearly defined, the right people are assigned to these roles (by all parties)

Deliverables for Business Value

Project deliverables are measurable and based upon business needs and processes

Joint Adventure with Customer

Success is a joint effort, achieved by close collaboration with the customer based on trust

Quality & Efficiency

Projects are executed efficiently and within ORTEC Quality standards

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Assignment: Draw a house (using Paint)

Learnings

- Communicate clearly; are we on the same page?

- Importance of getting continuous feedback

- Alignment with internal and external stakeholders is key

- What else?

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Communication & Expectations
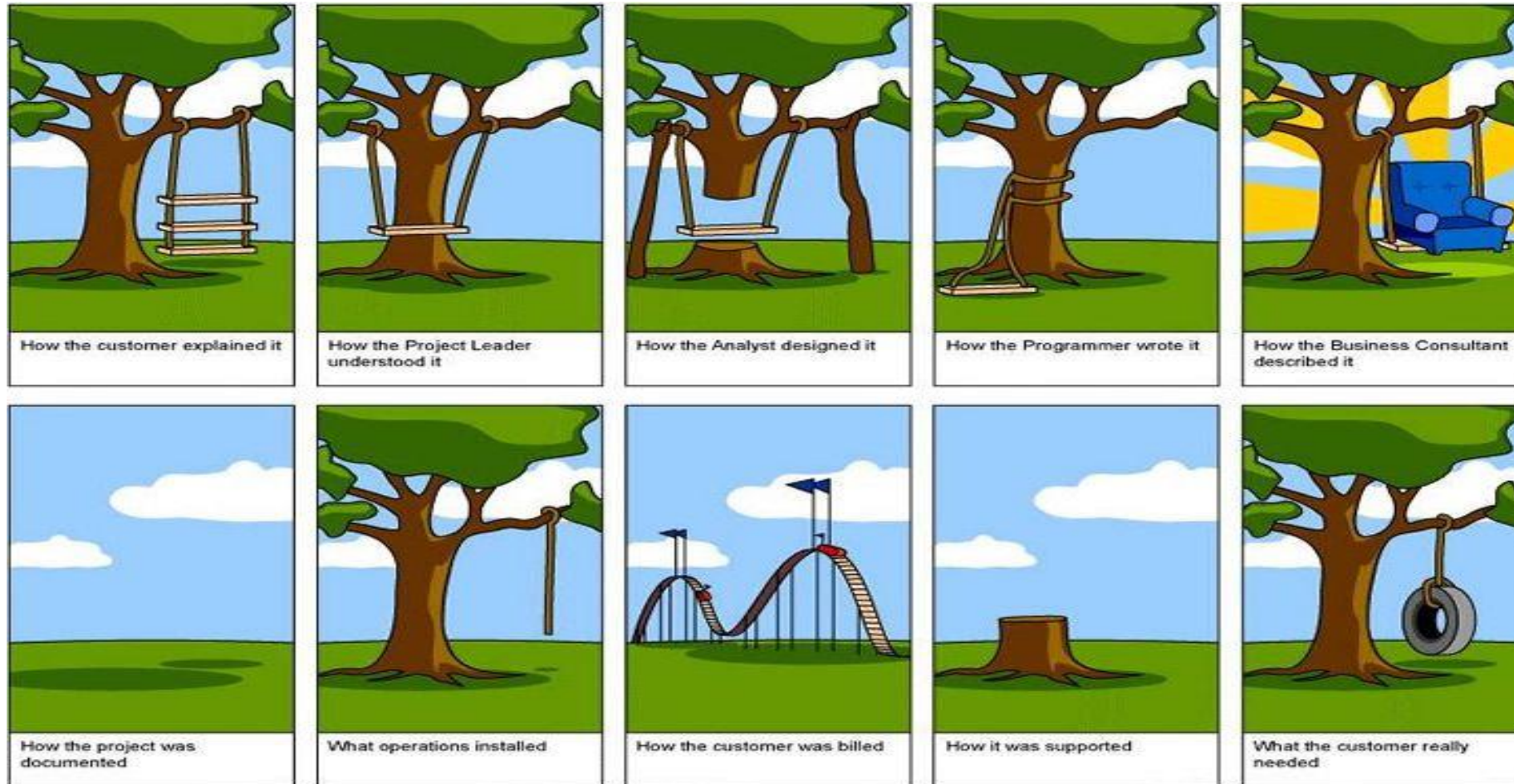
Your responsibilities as a Project Manager

Expectation management

- Customer
- Team
- ORTEC

Team Management

- Set project targets
- Decision maker
- Motivate and support learning goals

Administration

- Monthly report (internal & external)
- Approve hours
- Revenues & invoices

Project Plan

- Planning
- Resources
- Financials

Monitoring

- Scope, quality, timeline & budget

Risk Management

- Identify and mitigate project risks

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02

Project Foundation

Let's get started!

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ORTEC Project Management Methodology

Foundation

Construction

Deployment

Project Initiation

Solution Assessment

1. Prioritize requirements

2. Analyze & design

3. Develop & configure

4. Test & integrate

Go-Live

Evaluate & Next Steps

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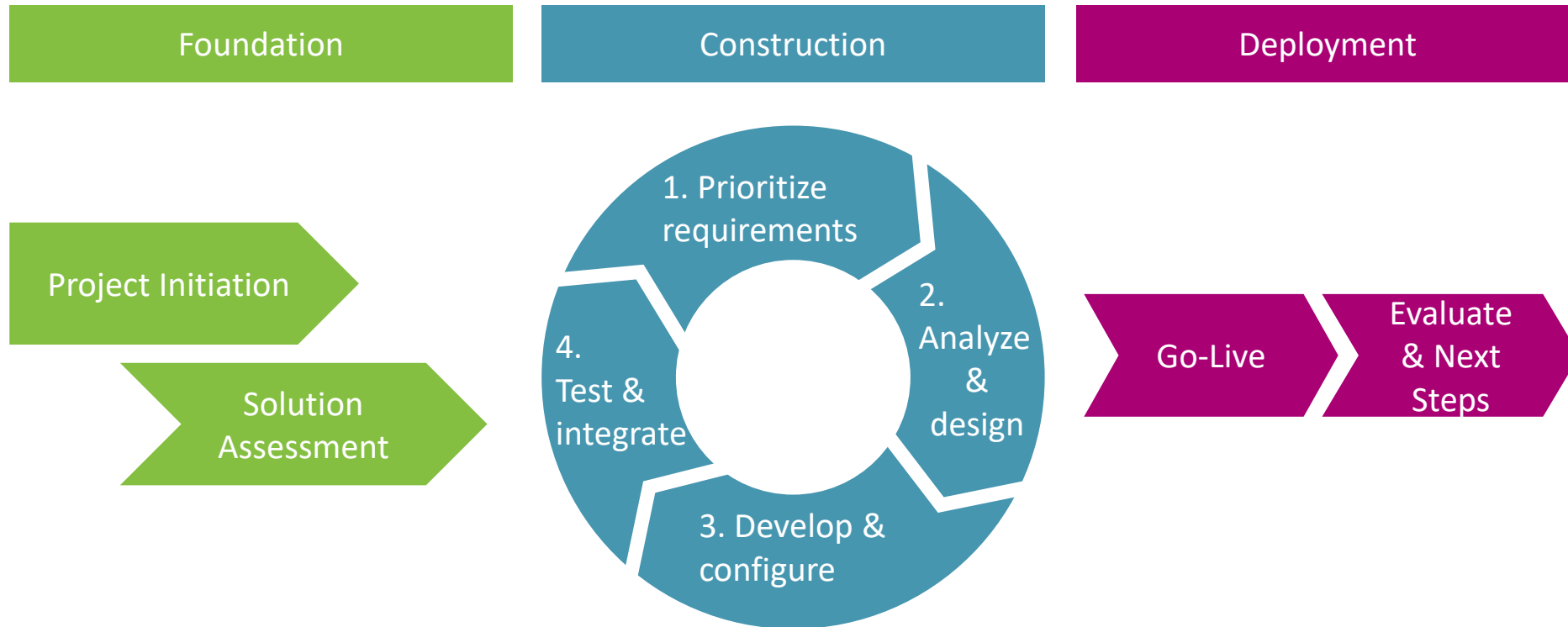
Handover Questions

1. What did we actually sell?

2. What is the high-level approach?

3. What skills do we need?

4. What is the total amount of work?

5. Do we have a signed Agreement and Statement of Work?

6. Do we have experience with this topic/customer/industry?

7. Who was involved at the customer side?

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Assignment – Kick-off subjects

- What is the goal of the kick-off session?

- Which topics do you discuss in the Kick-off meeting?

- Time: 10 minutes

- Go to your Break-out room

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Kick-Off

Why?
- Introduction Industry & customer
- Business Challenge
- Success Criteria

How?
- Scope & Deliverables
- High level planning

Who?
- Stakeholders
- Roles & Responsibilities project team

What?
- Short intro on functional part
- Short intro on technical part

Risks?
- Risk Assessment during the session

Next steps
- Working agreements (project days, etc)
- Concrete actions (who is planning sprints/workshops, checks holidays, etc)

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Resourcing

- Think of which type of resources you need (PM, solution architect, functional analysis, data engineer, data scientist, OR engineer, developer, etc.)

  - Which competences do you need in your project?

- At which part(s) of the project do you need them?

- Create an overview of the resourcing needs to be able to request these people. Make sure that the overview is documented in the Resource Tool and shared with the resourcing lead.

- Note, the Resource Tool is used to make a financial forecast months

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High level Project plan – Example EPS

Scope 🟢
Quality 🟢
Budget 🟢
→ Timeline 🟢
Cooperation 🟢

| Sprint 1 | Sprint 2 | Sprint 3 | Sprint 4 | Sprint 5 |

29 March   27 April   25 May   June   July
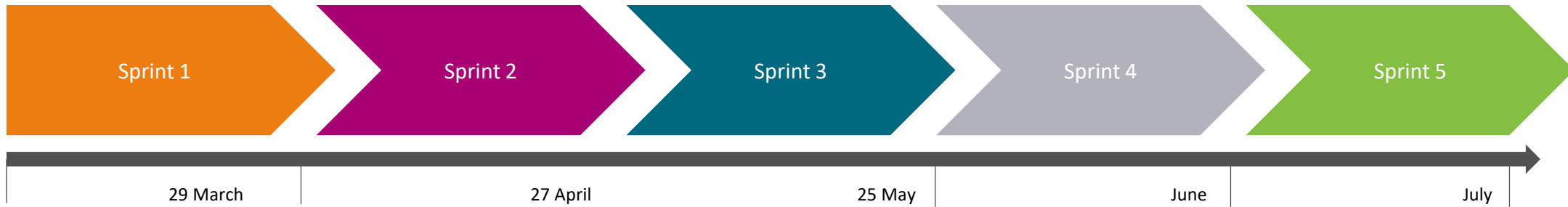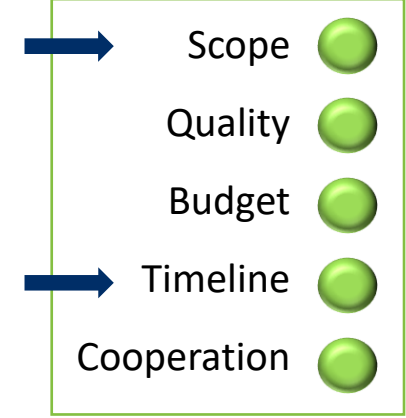
Sprint 1

Strategic Optimizer (70%):
- Full data model
- Integration forecasting
- Strategic scenarios
- 2nd Application

Sprint 2

- Strategic Optimizer (95%)
- Tactical Optimizer (70%)
- Master Data Mng. (70%)
- Country App (70%)
- Reporting App (50%)
- Link to BI (70%)
- Setup BDP(70%)

Sprint 3

- Strategic Optimizer (100%)
- Master Data Mng. (100%)
- Tactical Optimizer (95%)
- Country App (95%)
- Reporting App (70%)
- Link to BI (100%)
- Setup BDP(100%)

- Training Strategic Optimizer
- Documentation Strat. Opt.

Sprint 4

- Tactical Optimizer (100%)
- Country App (100%)
- Reporting App (95%)

- Finetuning on feedback
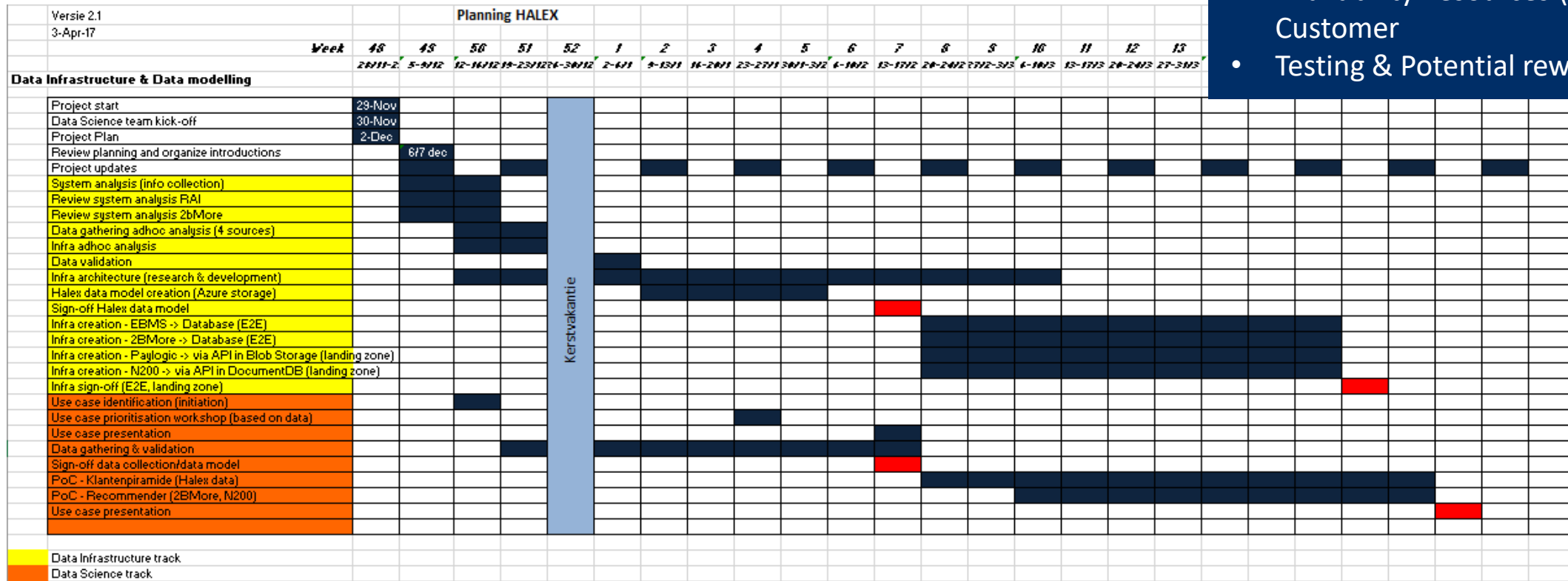- Training Tactical Optimizer
- Documentation Tact. Opt.

Sprint 5

- Reporting App (100%)

- Hypercare
- Open items

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Project Plan & Timeline

Consider:
- Deadlines
- Dependencies topics
- Leadtime topics
- Availability Resources (ORTEC & Customer
- Testing & Potential rework

Planning HALEX

	Week	48	49	50	51	52	1	2	3	4	5	6	7	8	9	10	11	12	13
		28/11-2	5-9/12	12-16/12	19-23/12	26-30/12	2-6/1	4-13/1	16-20/1	23-27/1	30/1-3/2	6-10/2	13-17/2	20-24/2	27/2-3/3	6-10/3	13-17/3	20-24/3	27-31/3

Versie 2.1
3-Apr-17

Data Infrastructure & Data modelling

- Project start — 29-Nov
- Data Science team kick-off — 30-Nov
- Project Plan — 2-Dec
- Review planning and organize introductions — 6/7 dec
- Project updates
- System analysis (info collection)
- Review system analysis RAI
- Review system analysis 2bMore
- Data gathering adhoc analysis (4 sources)
- Infra adhoc analysis
- Data validation
- Infra architecture (research & development)
- Halex data model creation (Azure storage)
- Sign-off Halex data model
- Infra creation - EBMS -> Database (E2E)
- Infra creation - 2BMore -> Database (E2E)
- Infra creation - Paylogic -> via API in Blob Storage (landing zone)
- Infra creation - N200 -> via API in DocumentDB (landing zone)
- Infra sign-off (E2E, landing zone)
- Use case identification (initiation)
- Use case prioritisation workshop (based on data)
- Use case presentation
- Data gathering & validation
- Sign-off data collection/data model
- PoC - Klantenpiramide (Halex data)
- PoC - Recommender (2BMore, N200)
- Use case presentation

Kerstvakantie

Data Infrastructure track
Data Science track

Project Plan & Timeline ll – Small Project

Scope 🟢
Quality 🟢
Budget 🟢
Timeline 🟢
Cooperation 🟢

Epic	High level inschatting incl slack	Preparation		Development phase												Verschil
		29-jun	6-jul	13-jul	20-jul	27-jul	3-aug	10-aug	17-aug	24-aug	31-aug	7-sep	14-sep	21-sep	28-sep	
Back-end	17	1	3	2	2	2	2	2	2	1						0
General + Home Screen	4			1	1	2	0									0
Insights	5					1	2	2								0
Price Overrides	9			4	2	1	2									0
Specials	8						2	4	1	1						0
Model Prices	7							1	4	1	1					0
Initial Prices	9								2	2,5	3	1,5				0
Settings	19										4	6,5	7	1,5		0
Rework														4,5	3	
Totaal	78															

Development Resourcing	Totaal															
Resource 1	30	1	2	3	2	2	3	3	3	1,5	2	2	2	1	1	-1,5
Resource 3	25			2	2	2	2	2	2	2	3	3	2	2	1	0
Resource 3	7						2	2	2	1						0
Resource 4	23			1	1	2	1	2	2	1	3	3	3	3	1	0
Resource 5	2		1	1												0

| | Verschil | | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |

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03

Project Execution

Let's leave the harbor and start to sail
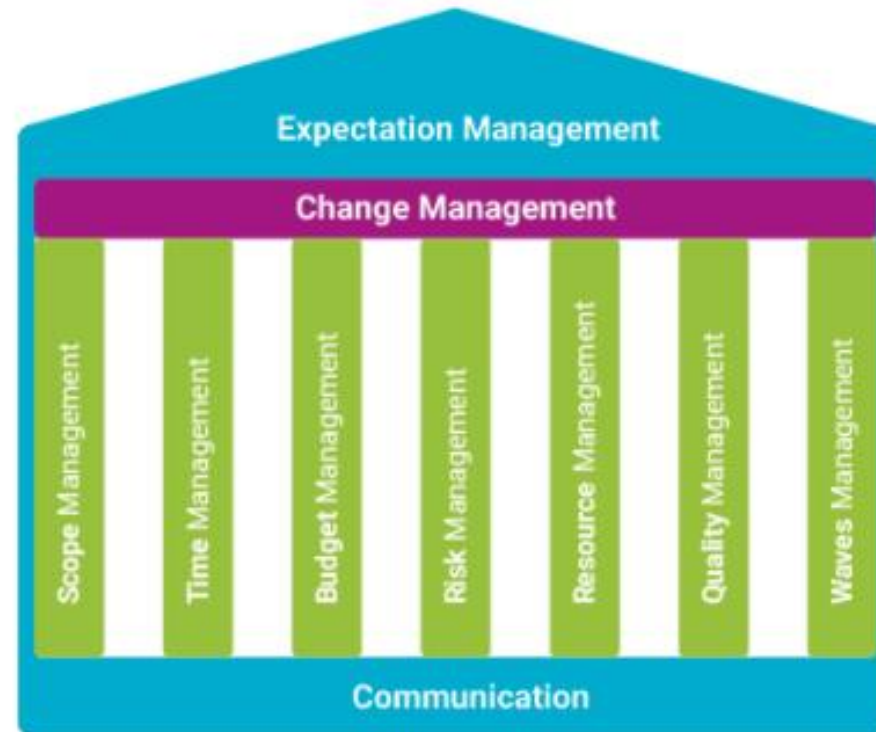
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Daily life of a project manager

- Having initiated the project, life is good ☺.
  You're the skipper: you look ahead and make sure the journey and destination are in line with your assignment and within the capabilities of the crew.

- Everybody onboard delivers his/her tasks and feels part of the crew?

- Everybody onboard know's the next haven and final destination?

- Everybody onboard knows the schedule and when the journey will be a succes?

  Happy sailing!

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How: tasks of the skipper

- Science

  - Monitoring of scope, quality, timeline & budget
  - Monthly financials
  - Planning

Expectation Management

Change Management

Scope Management · Time Management · Budget Management · Risk Management · Resource Management · Quality Management · Waves Management

Communication

- Art

  - Communication on expectations
  - Supporting the customer in the change
  - Crew/team involvement
  - Signaling Risks & issues

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Daily life of a PM – the science part:

Administration

- Monthly report (internal & external)
- Approve hours
- Revenues & invoices

Project Plan

- Planning
- Resources
- Financials

Monitoring

- Scope, quality, timeline & budget

Aan elkaar knopen met monitoring & control slide
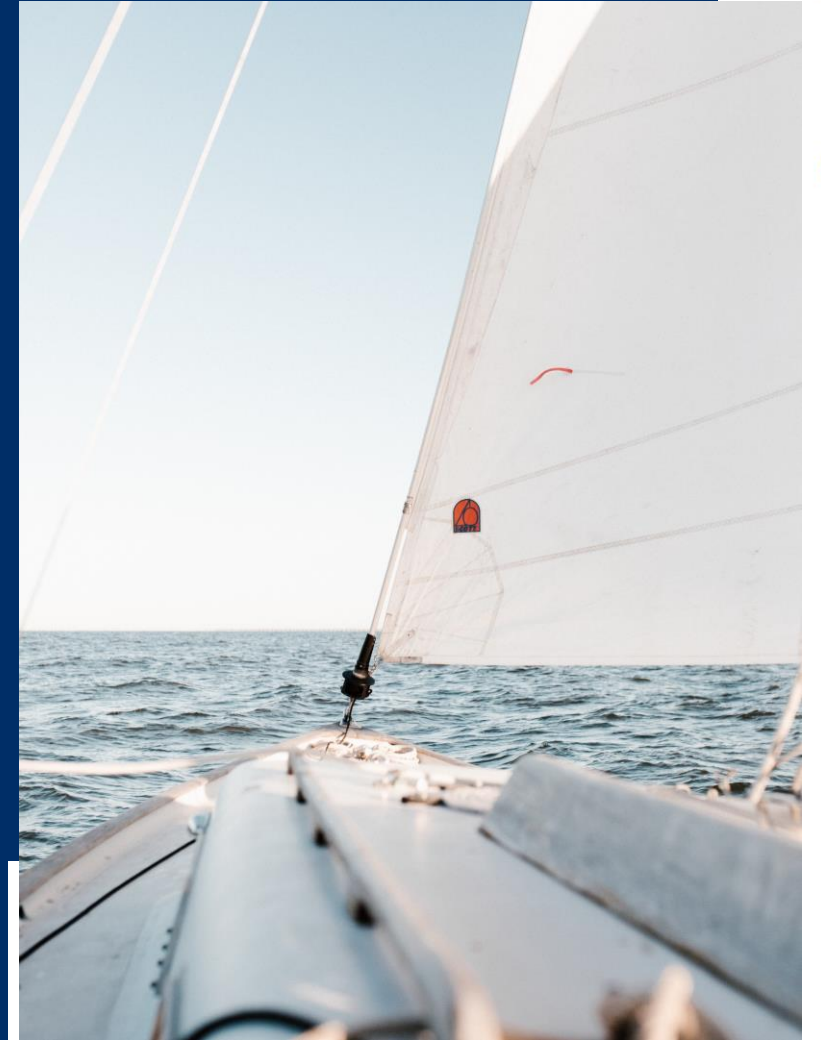
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Daily life of a PM – the art part:

Expectation management

- Customer
- Team
- ORTEC

Team Management

- Set project targets
- Happy team
- Motivate and support learning goals

Risk Management

- Identify and mitigate project risks

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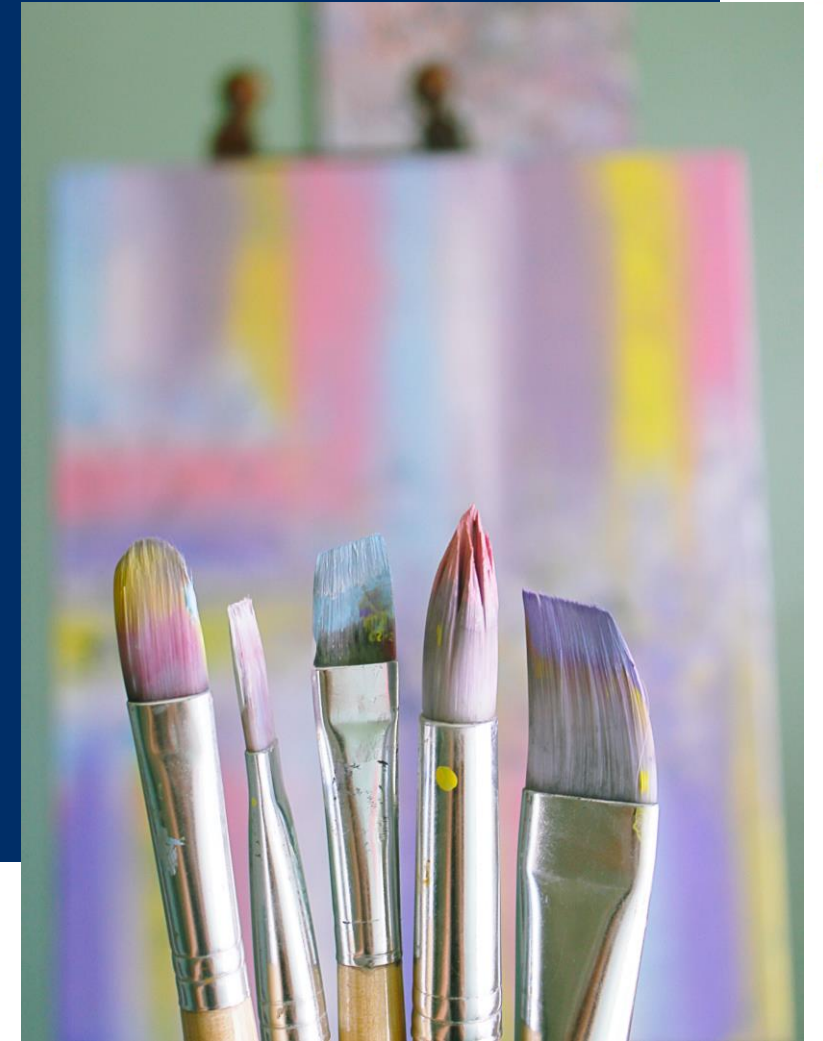
General tips

- You don't have to do everything yourself. Use **delegation** & **escalation** to create time and clarity.

- Create **a healthy and cooperative working** atmosphere with your team and customer. Preferably on-site. People aren't 'resources' and generally like and deserve attention.

- Be a **leader** to your team, in good & bad times. Give the right example when issues occur.
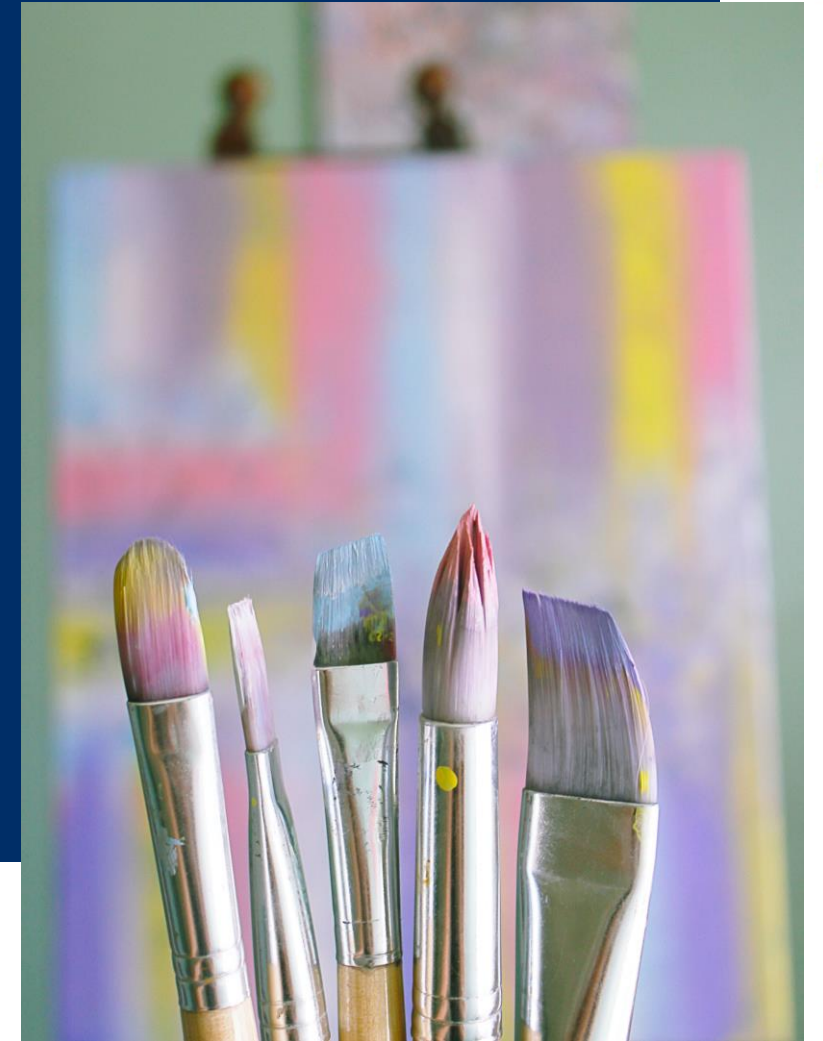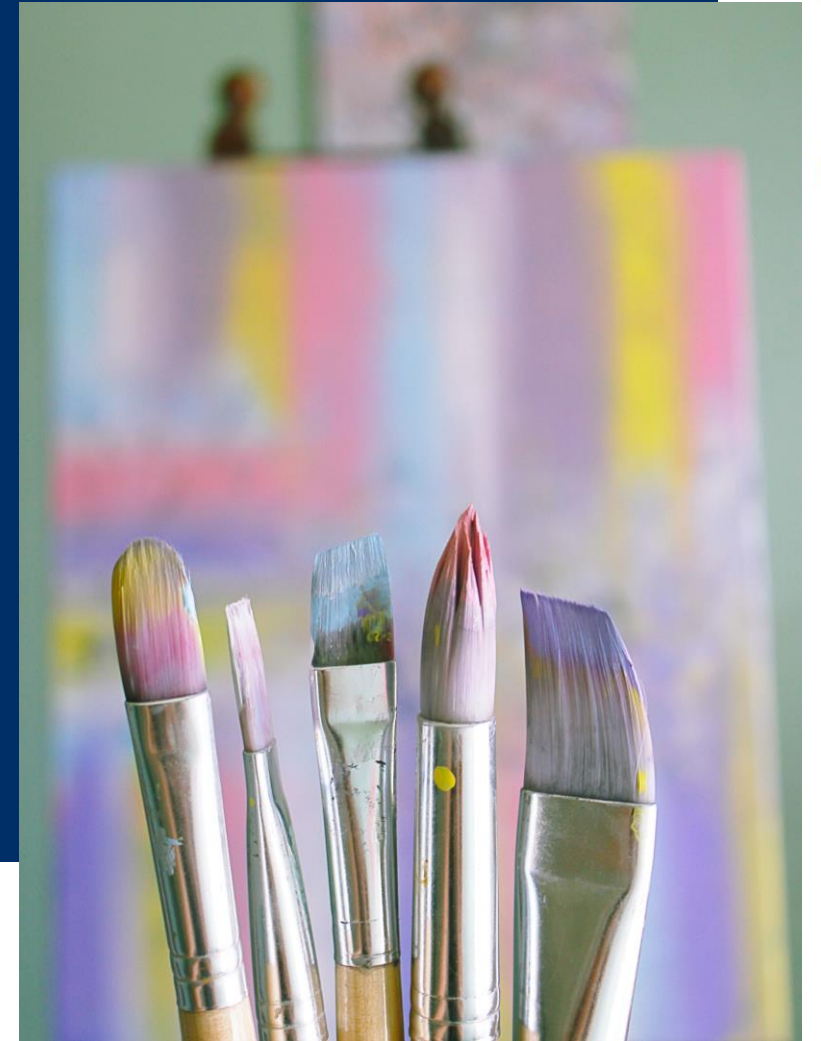
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Daily life: communication

- **Communication** is key to keeping stakeholders informed, happy and be aware of status and risks.

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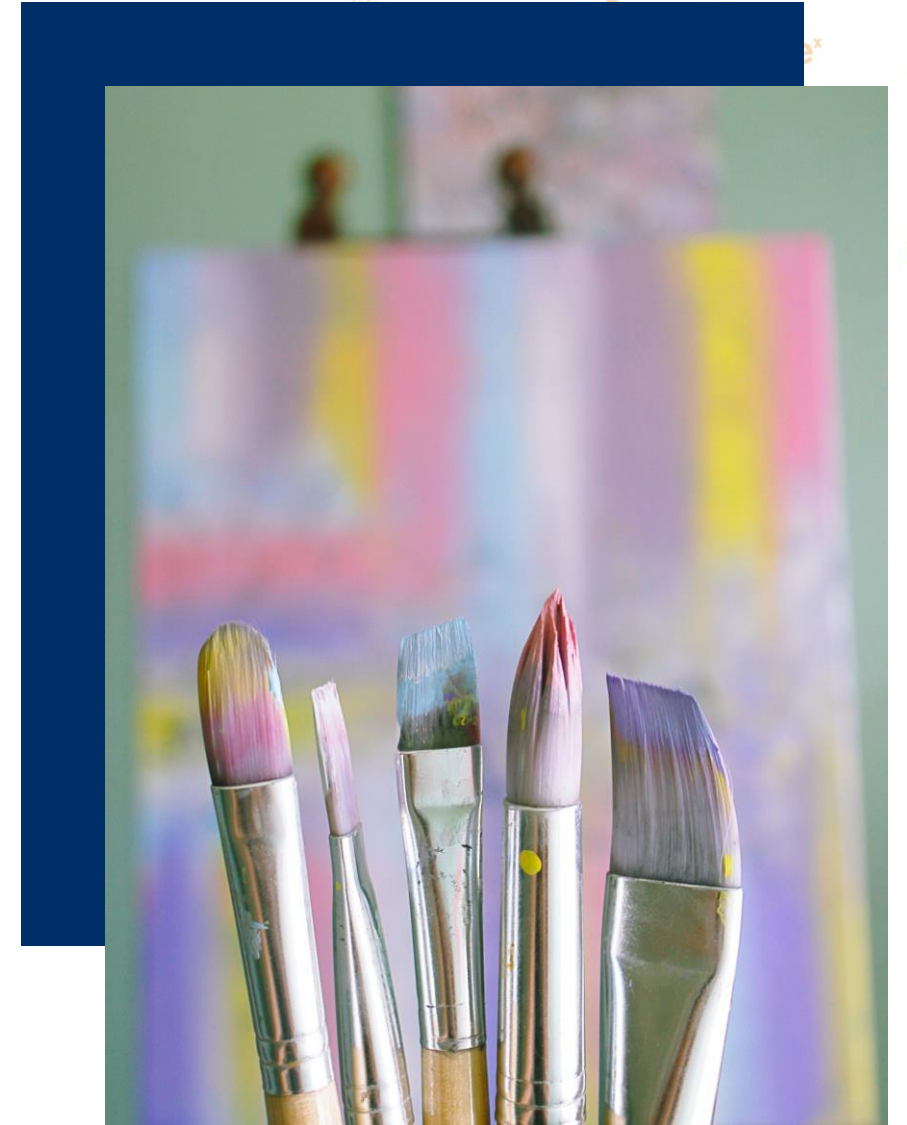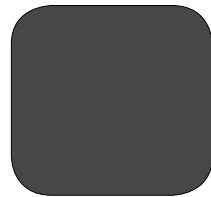
Daily life: communication

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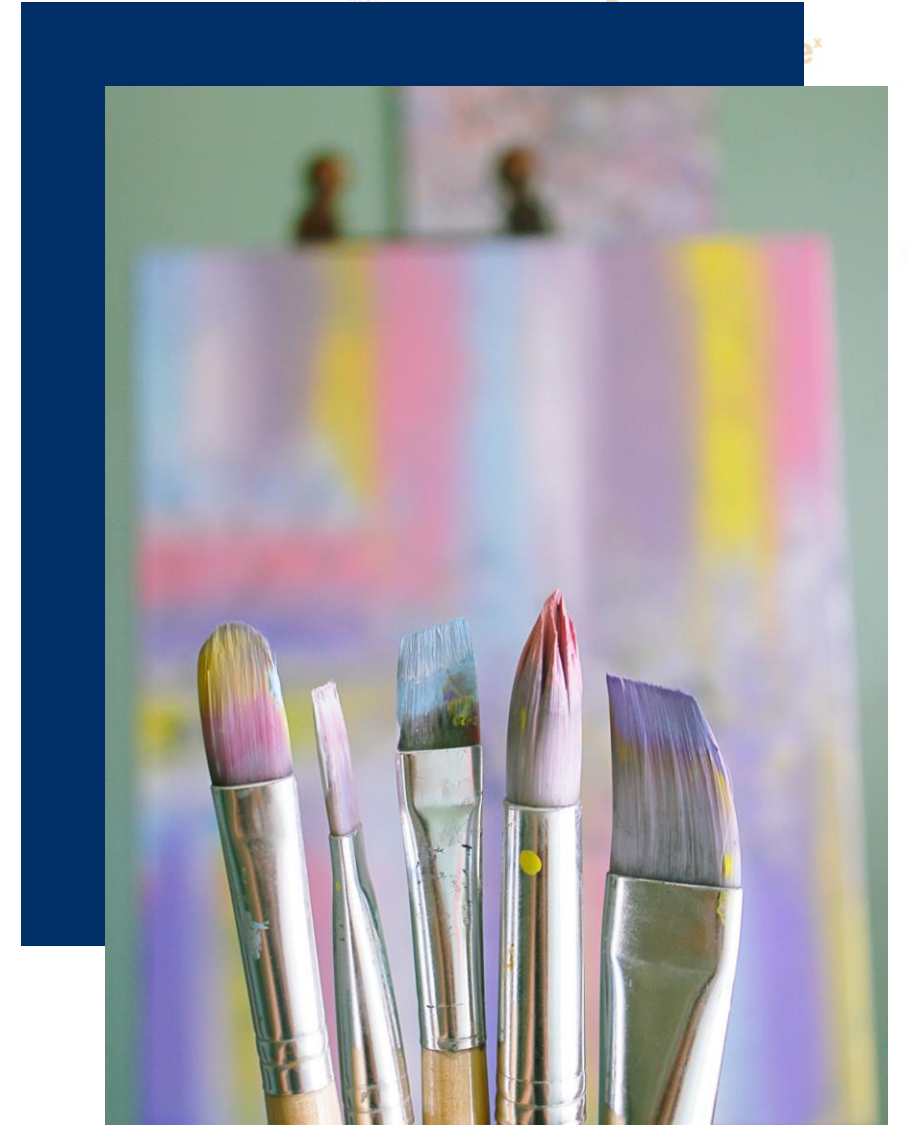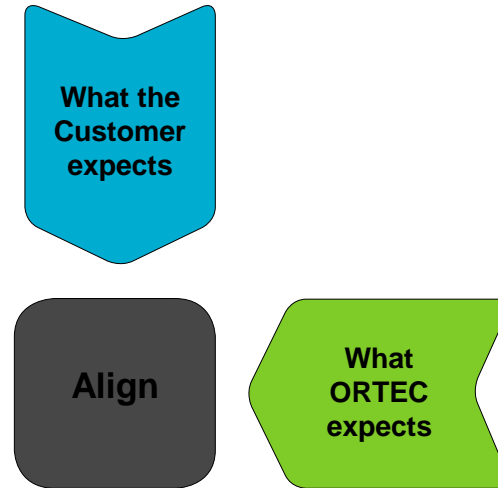
Align

ORTEC

Daily life: communication

- **Communication** is key to keeping stakeholders informed, happy and be aware of status and risks.

What the Customer expects

Align
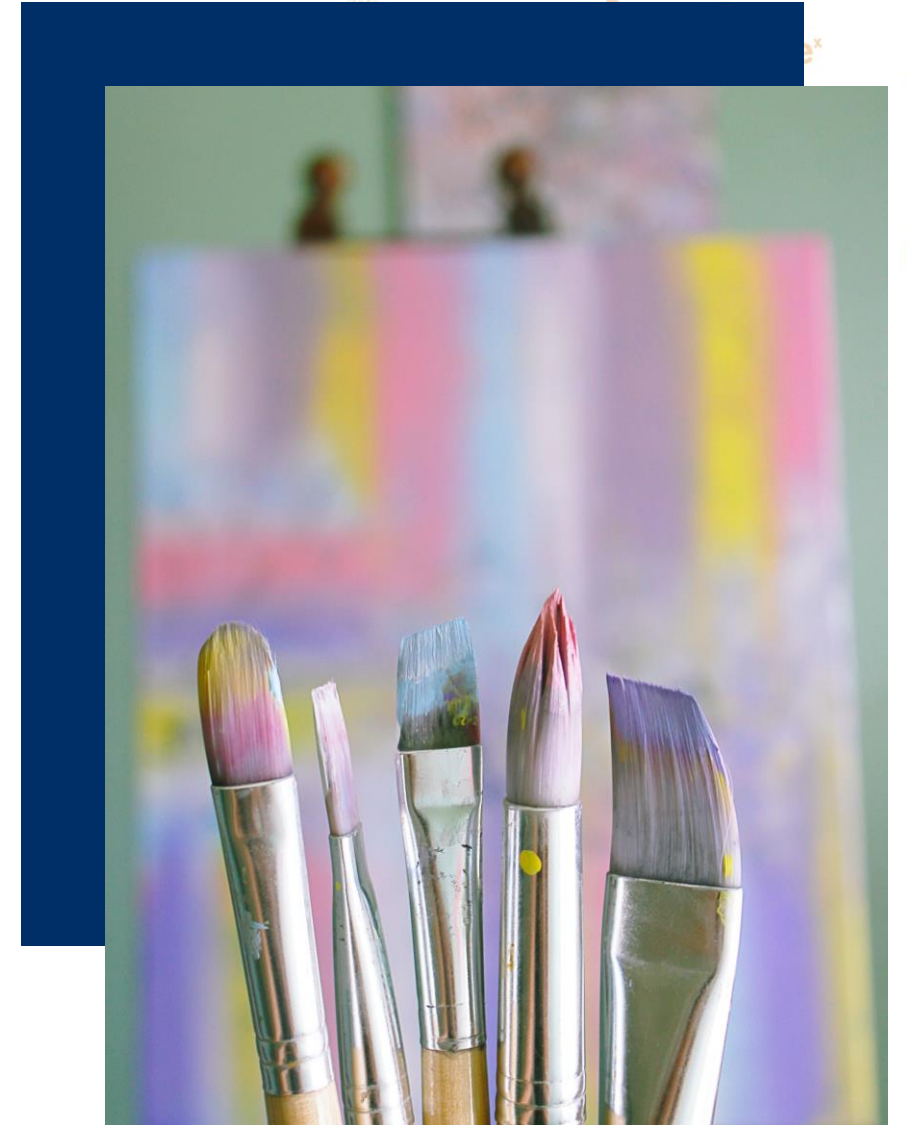
Daily life: communication

- **Communication** is key to keeping stakeholders informed, happy and be aware of status and risks.

What the Customer expects

Align

What ORTEC expects

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Daily life: communication

- **Communication** is key to keeping stakeholders informed, happy and be aware of status and risks.

What the Customer expects
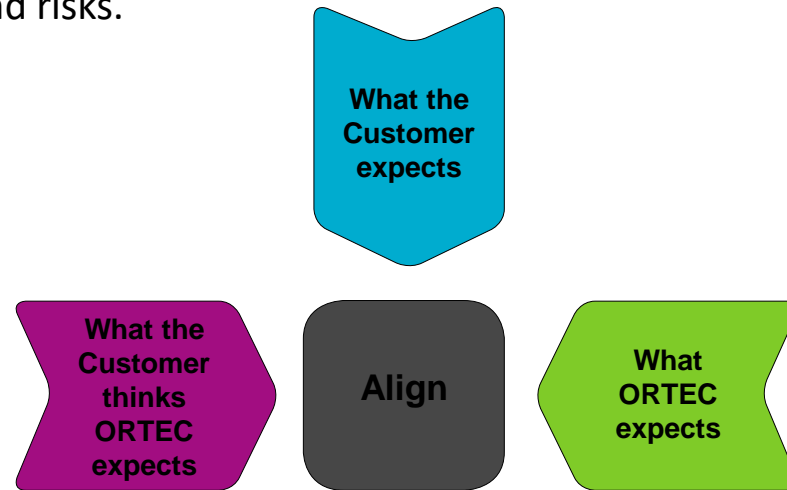
What the Customer thinks ORTEC expects

Align

What ORTEC expects

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Daily life: communication

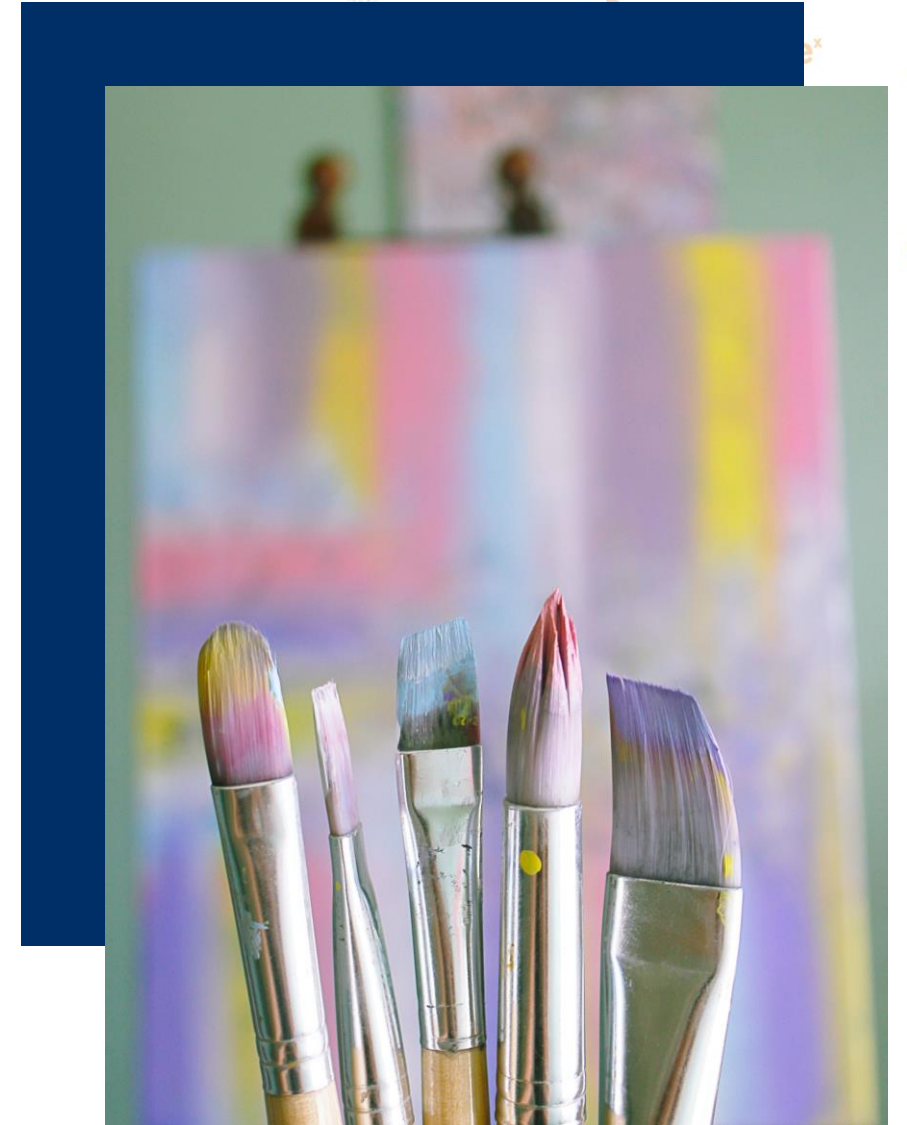- **Communication** is key to keeping stakeholders informed, happy and be aware of status and risks.

What the Customer expects
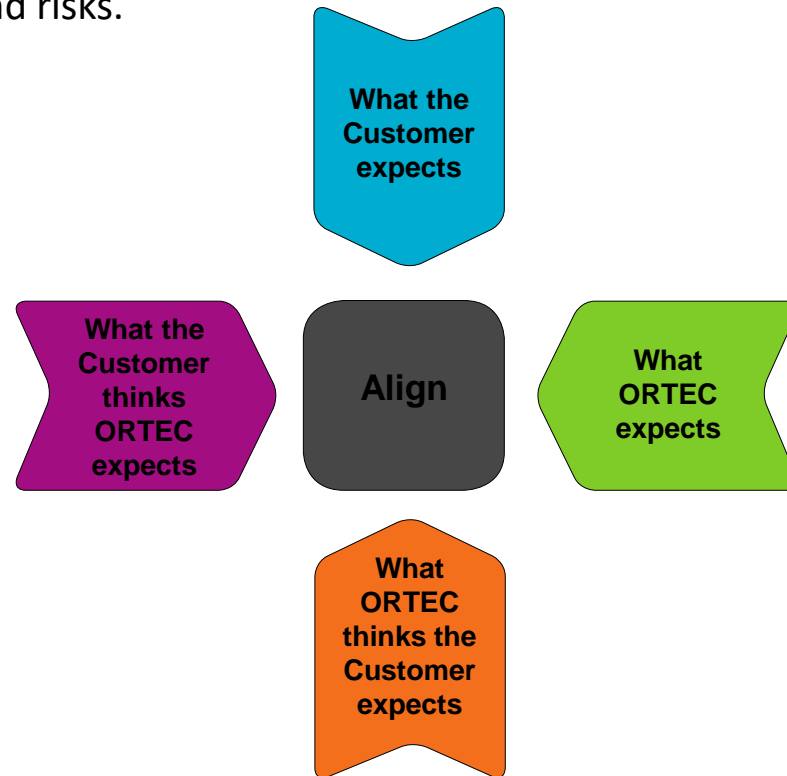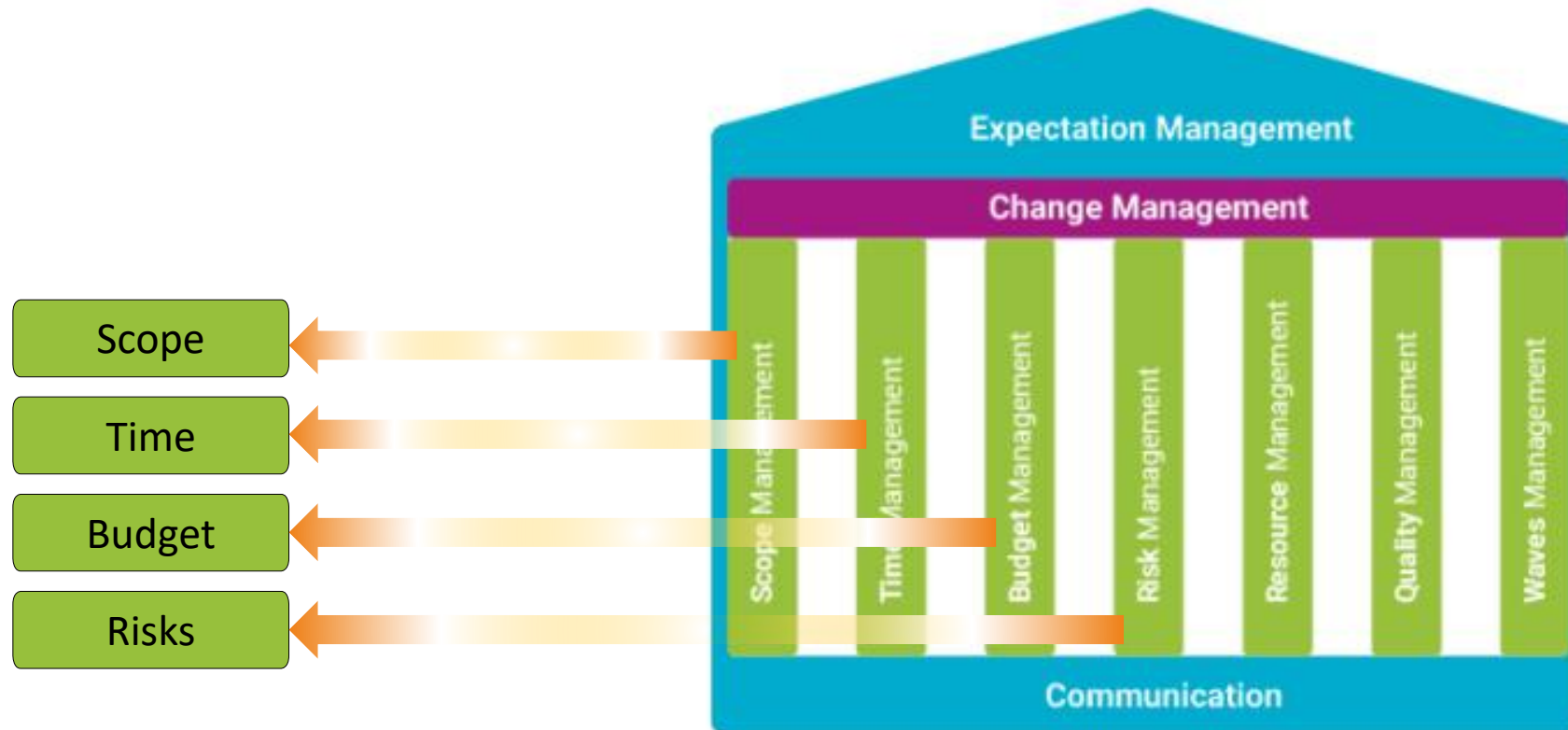
What the Customer thinks ORTEC expects

Align

What ORTEC expects

What ORTEC thinks the Customer expects

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What to emphasize in project communication?

Scope management
('Keep an eye on the value')

Definition

Managing the work agreed upon between project manager(s) and the project board.

Scope: what the project delivers and what it will not include

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Scope management ('Keep an eye on the value')
Working in Projects revisited

Requirements
Gather requirements and prioritize

Solution and deliverables
Define solution (features and functionality), document & sign off

Monitor
Monitor each (proposed) scope change

Out of scope
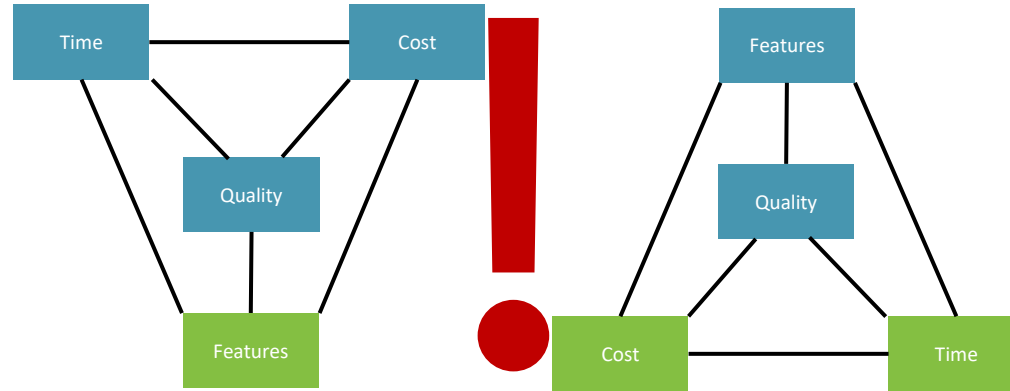Beneficial to the project success criteria?

Approval
Get approval for each change

Completeness
Final review of delivery against agreed scope, sign off

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Scope Management – Daily Life

Evaluate

Request change

Implement

Analysis

Approval

| Time | Cost |
| Quality |
| Features |

| Features |
| Quality |
| Cost | Time |

Keep your project balanced at all time

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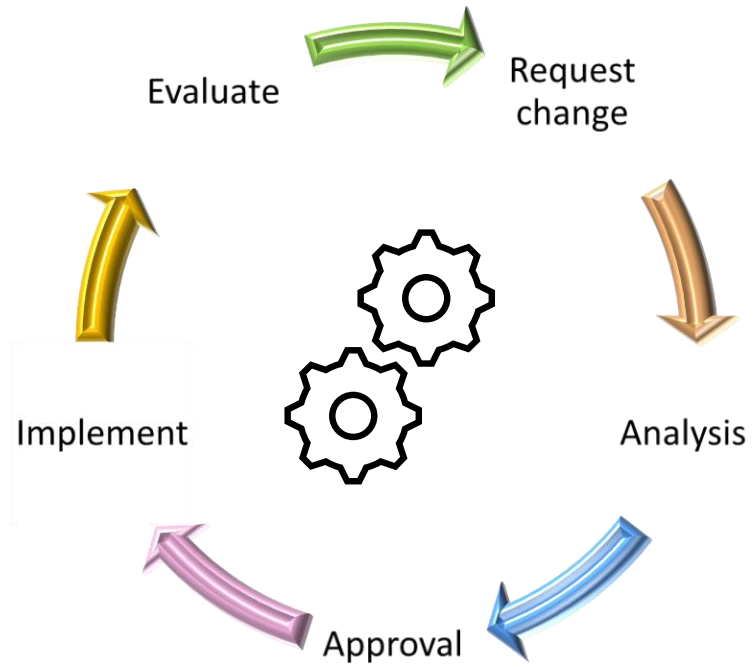
Time management
('Will Time overcome all problems?')

Definition
A range of skills, tools, and techniques used to manage time when accomplishing specific activities and deliverables

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Time management ('Time will overcome all problems?')
Working in Projects revisited

Baseline
Create baseline: establish project plan. Create new baseline when your project plan changes

Sign off
Sign off baseline by project board

Measure
Create detailed plan at the start of each wave and monitor progress

Analyze
Analyze possible effects of changes to project plan

Monitor
Monitor progress and forecast against plan

Act
If needed, act on any deviations

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Time Management – Daily Life

- Managing time = Managing the schedule

  - Measure progress against your baseline plan (know your schedule status)

  - Obtain status for each project deliverable (% complete)

  - Monitor at least once a month (smaller/critical projects require different frequency)

  - Ask team leads/consultants for end date of completed deliverables

  - Update your plan with the obtained status information

- Proactively inform your stakeholders. Focus on deliverables and not single activities

- Stick to the schedule whenever possible. Changes to the schedule introduce extra cost and new risks

- Consider Crashing or fast-tracking your schedule to keep on track.

Keep your project balanced at all time

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Budget management
('It's all about the money')

Definition

Budget management is the process for establishing the total budget and monitoring and controlling the actual costs of the project against the budget.

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Budget management ('It's all about the money')
Working in Projects revisited

Baseline
Create baseline: establish project budget
(effort, hardware, software license)

Sign off
Sign off baseline by project board

Measure
Create detailed plan at the start of each wave
and monitor progress

Analyze
Analyze possible effects of changes to project
Budget

Monitor
Monitor progress and forecast against budget

Act
If needed, act on any deviations

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Budget Management – Daily Life

- Control your budget by controlling your Scope, Schedule and Risks. Never reduce cost by cutting down on quality

    Keep your project balanced at all time

- Know cost status of your project (not only hours but also materials)

| Project:		Current Month		To Date		Planned		Remaining	
Cost Acct	Item/person	Hrs	Cost	Hrs	Cost	Hrs	Cost	Hrs	Cost
0001									
	Total								
0002									
	Total								
Total									

- Actively monitor project hours. Do not wait until the end of the month

- Implement timesheet procedure. Ask team members to enter their hours daily (spent & forecast). A project manager can only manage the budget when information is current.

- Communicate any deviations as soon as possible. Try to present solutions not only facts.

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Risk management
('Expect the unexpected')

Definition
Risk Management is the identification, evaluation and prioritization of risks followed by actions to minimize, control and monitor these potentially impacting events.

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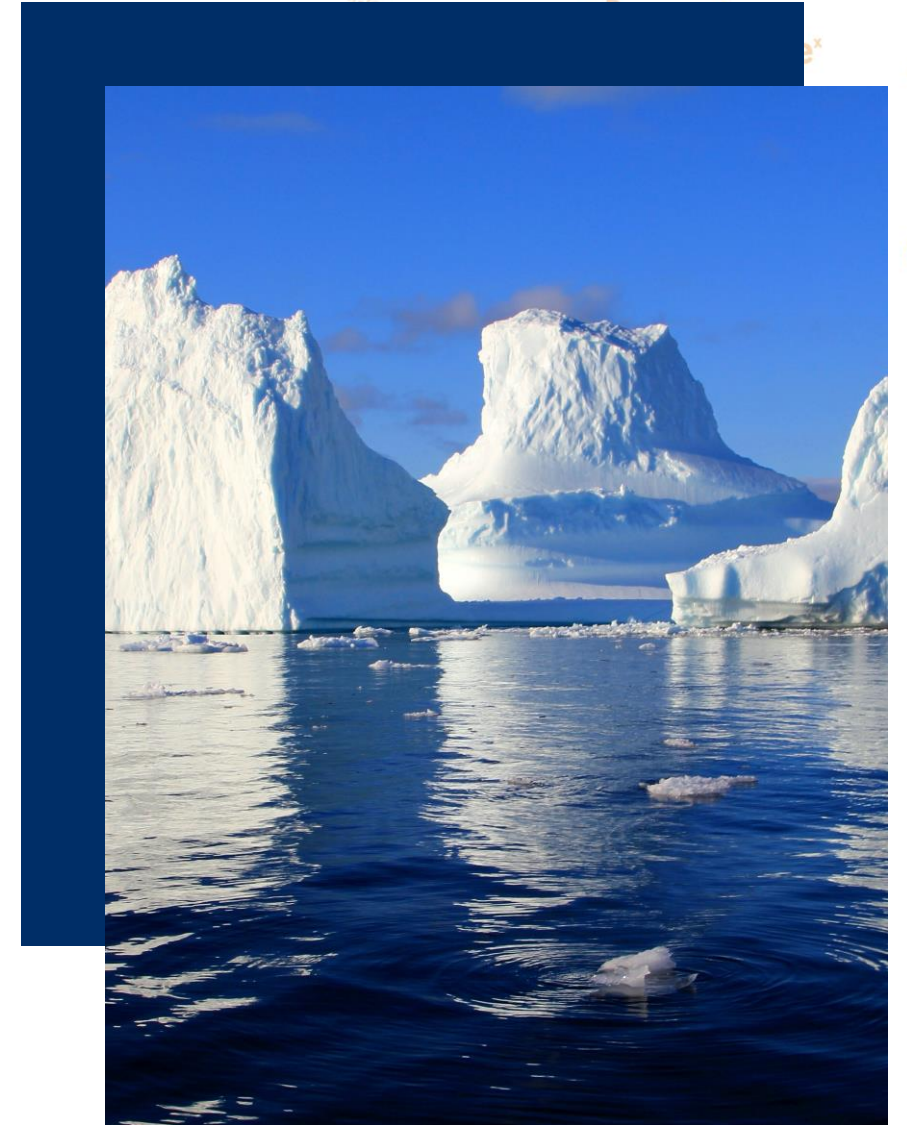
Risk management ('Expect the unexpected')
Working in Projects revisited

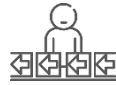**Identify**
Identify all risks throughout the project life cycle

Quantify
Quantify each risk
(impact and likelihood)

Action
Assign owner and determine appropriate action for each risk
(avoid, transfer, mitigate or accept)

Monitor
Continually monitor all risks

Log
Create and maintain a risk log

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Risk vs. Issue

Risk is an uncertain event that, should it occur, will influence the outcome of your project. (positive/negative)

Issue is a 100% certain problem that will have a negative impact on your project.

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How to manage Issues – Daily Life

- Log all issues in your project issue log

- Check and update your issue log regularly

- Take action asap

  - Clarify
  - Assign to person
  - Adapt planning (if required)
  - Solve asap ☺

- Communicate to stakeholders

- Evaluate process

Ref#	Category	Description	Impact	Issuer	Owner	Action taken	Status

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Huston...we have a problem

- Situation: you're the PM of a FP project. There's a very complex bug in the AIMMS environment . Your team wants to solve it, but doesn't know how. Could this be an AIMMS problem?

  Customer is angry, they paid bigtime, need to go live YESTERDAY, and demand this bug to be solved ASAP.

- Business Lead is very angry, because the project margin is already very low.... and doesn't want to spend more budget.

- Which are the max 4 actions you take within the following 6 domains (15 minutes):

- Expectations Management, Team management

- Risk, Monitoring, Administration

- Project Plan

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My take:

- I would:

  1) **Scope.** -> Who owns this problem? Do we agree that ORTEC needs to solve this? Who's responsibility for an AIMMS problem?

  2) **Team Management** -> Give full responsibility to the lead consultant to get it sorted, and create an positive atmosphere and facilitate problem solving.

  3) **Project Plan** -> Organize maximal resourcing support, including AIMMS of expertise via busines lead (also managing expectations ☺)

  4) **Administration** -> Setup daily or even hourly routine to inform the customer on progress, and give them the idea that we do <u>everything</u> it takes.

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04

Project Deployment

It's a wrap!

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Assignment – Project Closure

- What is needed to officially close your project?
- Which actions do you need to take at the end of your project?
- Time: 10 minutes

- Go to your Break-out room

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Project Closure

The last mile

- All deliverables finished? (Pay attention to special ones e.g., user training and documentation)
- Go-live period
- Hypercare period

Closure meeting

- Official discharge from the customer
- Evaluate
- Plan follow-up meeting
- Next projects & Up/cross-sell ideas spawned

Support

- Prepare handover to GCS (Global Customer Support) or M&S-team (Maintenance & Support)
- GCS/M&S-team informed & trained

Administration

- Close Synergy code, MS Teams, Jira etc.

Celebration!

- Communicate about the project
- Celebrate the closure of the project

05

Training Closure

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Listen To Your Gut Feeling
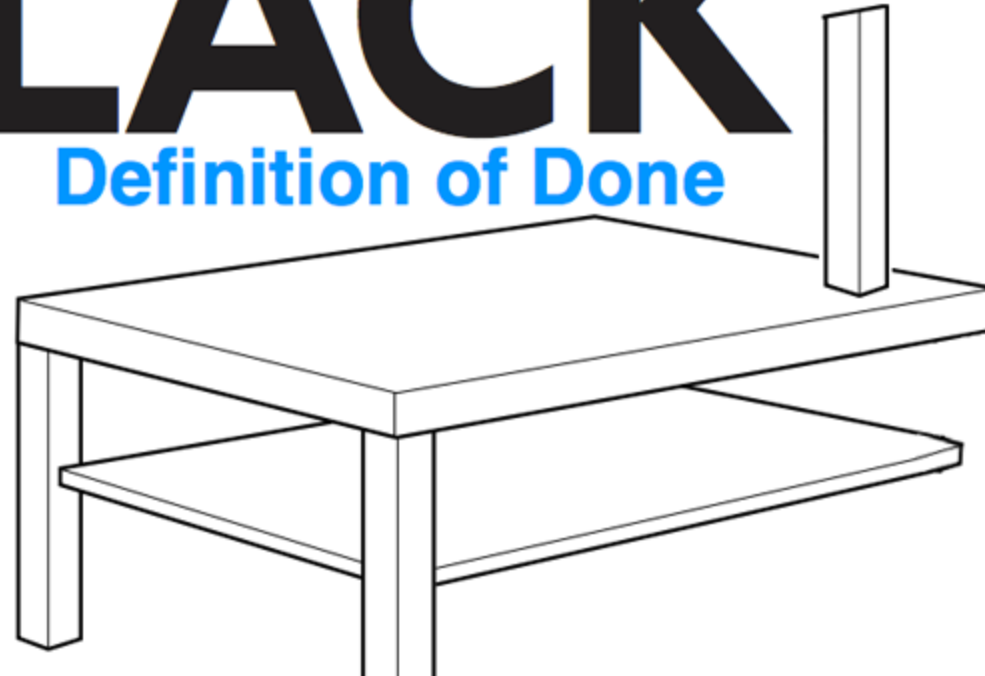
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Involve The People Around You

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Invest In Relationships

TRUST

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Make Clear Agreements

Have your administration in order

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Your most important take-aways?

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