February 10 Lunch and Learn

1. Intro

You’ve been told that a new project is coming up, so now what do you do? As a project manager, there are specific process groups and knowledge areas that are followed methodically with every project. What about the initiating phase, one of the process groups with the least amount of knowledge areas, but does that make it less important?

Getting a project started correctly is the key to a smooth execution in the later phases. In order to make a positive first impression, we must consider not only the first customer contact, sales handoff, internal and external kickoffs, project plan, and initial project schedule. What elements need to be addressed in the first weeks of a project that give the team a solid foundation on which to build a successful project?

1. Initiating Phase
   1. First phase
   2. Introduction
      1. In advance
      2. Pre kickoff informal introductions/meeting.
   3. Importance
      1. Research project, company, customer, etc.
      2. First impressions
      3. Sets the tone
      4. Setting expectations, ground rules
      5. Ensures success
2. Discussion – What are the key ways to promote positive first impressions and appropriate expectations?
3. Internal Team Kickoff
   1. Why
      1. Why are we doing this?
      2. Is this possible?
      3. What are the issues?
      4. What could be the setbacks?
      5. What about the timeline?
      6. Ensures success
   2. What
      1. What is it we are doing?
      2. What information do we have to date?
      3. What don’t we know?
      4. What do we need to ask of the external team?
      5. Discuss feasibility of project
         1. Continue?
      6. What should the results be?
   3. Who
      1. Key members
         1. Technical sponsor
         2. Sales team
         3. Delivery team (engineers)
         4. Testers
         5. ??
   4. When
      1. Before planning begins
4. External Team Kickoff
   1. Face to Face
      1. Importance of
         1. Personal, one on one interaction
         2. Communication clarity
      2. Can be combined with other project tasks to save money
   2. Why
      1. Overview of project
      2. Project resources
      3. Discussion
      4. Confirmation
      5. Ensures success
   3. What
      1. What is it we are doing?
      2. What information do we have to date?
      3. What don’t we know?
      4. What do we need to ask of the external team?
      5. Discuss feasibility of project
         1. Continue?
      6. What should the results be?
   4. Who
      1. Key members
         1. Business Sponsor
         2. Customer
         3. Internal key members, as agreed
5. Conclusion
   1. What next – move forward?
      1. Can the project be “killed” at this stage?
   2. Transitioning to requirements planning
   3. Team alignment