



ITAM Project Management

From Ad Hoc Practices to Streamlined Processes

Just as our dedicated troops are sent on missions armed with the necessary equipment and the education on how to best utilize that equipment, the global ITAM community is comprised of countless troops of business professionals who are united by the common thread of IT Asset Management education, practices and principles. These are the individuals, your brethren, who in the last 25 years have grown from operating and maintaining relatively meager, mostly isolated and non-networked computer systems, into the highly educated and resourceful professionals that you are today. You are a new breed of highly efficient personnel with a very strong business sense and purpose. This is exactly the reason that we at IAITAM have made it our primary mission to: “Teach the Business Side of IT Asset Management”.

History Lesson in Project Management

In thinking about that brief ITAM history, I was curious as to the roots of what we consider to be modern day Project Management. As such, I put on my “white hat” to find facts and figures concerning the origins of the styles of PM that we teach and practice in today’s ITAM environments.

Project Management is said to have started as a discipline developed from different fields of application such as construction, engineering and defense. Do you know who is considered to be the “forefather” of Project Management? It happens to be the same individual who created a widely used PM planning tool (the Gantt chart); Henry Gantt, often referred to as the father of planning and control techniques. Henry Gantt, using his talents and the theories of Frederick Winslow Taylor, is well known for his studies of the work and management of Navy ship building. The culmination of Henry Gantt’s life work also spurred the creation of many currently used PM tools including Work Breakdown Structure (WBS) and resource allocation.

The foundation of Project Management had clearly been laid, with the formation and refinement of modern PM to follow, starting over 30 years after Gantt’s death in 1919. Through the 1950’s and most of the 60’s, two mathematical management processes were developed and used: Program Evaluation and Review Technique (PERT), and the Critical Path Method, both used mainly for government and large corporation’s plant maintenance projects, and then was quickly adopted by many private enterprises.

On the financial side of Project Management was the

American Association of Cost Engineers (AACE) focused mainly on estimating costs associated with PM. AACE then released what is touted as the first ever integrated process for Portfolio, Program and Project Management (Total Cost Management Framework) in 2006.

In 1967, five volunteers gathered to fill what they saw as a need in the overall field of Project Management. Their contention was that effective Project Management was essentially the same regardless of industry. From the software industry to the construction industry, the principles were the same and relevant to all. In 1969 those individuals formed the Project Management Institute (PMI) to serve the interests of the Project Management Industry.

In 2002, International Association of Informational Technology Asset Management Inc. was founded because a few visionaries did not subscribe to the “one size fits all” form of Project Management as well as many other aspects of the then current IT asset management processes. Because the ITAM community was so unique in their daily workings and needs, it was clear that a specialized, more specifically refined type of Project Management was much needed, focused solely on IT asset management practices. Remember also that compliance issues were already a strong factor in the industry at that time, and needed to be more assertively addressed within the management plan. In fact, it was soon realized that most generalized business plans that were applied to IT asset management were noticeably inadequate.

Through extensive research, observations and the talents of a small but experienced staff, IAITAM was able to groom solid business practices into the newly formed Best Practices that does specifically meet the needs of IT asset management. This was accomplished through the recognition of 12 Key Process Areas (KPA) within ITAM, one of which is Project Management.

An Organized and Managed Group of Activities

While the history of Project Management is quite interesting, the importance of current and future PM practices needs to be covered in some detail. The following information is an overview and outline of IAITAM’s Best Practice in Project Management.

A project can be described as an organized and managed set of activities that results in the achievement of a unique and well defined end-result or work product, often referred to as a

deliverable. Unlike recurring operational activities, a project has a definitive start and a calculated end, with a set timeline for project completion. Another defining indicator of a project is that it is normally accomplished by a team of personnel rather than just one individual.

The purpose of Project Management is straight forward; to manage a group of tasks, resources and people while staying within the boundaries of a defined scope and budget to produce the desired resultant success of the project, which was actually determined during the planning stage of the project.

In our overview of Project Management we will explore the different phases of the process. Planning is your road map to success. Actions without a well thought out plan in place are nothing more than haphazard reactionary movements; not at all proactive.

Initiating the Project

With the importance of planning steps in mind, the realization becomes clear that we must have a reason for a plan of action. Projects don't just happen to fill our workdays, they exist and are implemented to satisfy a recognized need within the organization. The recognition of need can stem from any number of sources, which for simplicity's sake we will classify as the project stakeholder(s). A stakeholder is the entity that wants to promote a positive initiative for the enterprise and has a strong and vested interest in the successful completion of the project. Since we have now been given reason to start a project, the effective use of the five phases of a project can be utilized, starting with the Project Initiation steps:

- Recognition of the project need
- Select the initial members of the project team
- Determine what the project needs to accomplish
- Define the overall project goal(s), end results, deliverables
- Define general expectations of customers, management and other stakeholders as appropriate
- Define the general project scope

Planning the Project

As I stated earlier, planning is the real foundation of the whole project. This is the area where full effort, intuition, experience and guidelines will determine how well the project will be able to achieve the desired goals, or if poorly planned, the outcome could be dismal. The preferred steps include:

- Begin the preliminary planning phase
- Conduct a feasibility and return evaluation
- List all planned tasks and activities
- Optimally sequence all activities
- Develop a working schedule and budget for assigning resources
- Gain plan approval from stakeholders
- Conduct detailed planning with combined information
- Refine the project scope

Executing the Project

This is the point where the entirety of the puzzle pieces fit together to form the execution phase of the plan. Choosing the best resources, developing budgets, examining detailed facets of varied analysis, the gaining of necessary approvals, etc, all mesh together as the beginning of the action phase of the project. This is also the point where strong and constant communications between the Project Manager and all involved entities is imperative. Some of those communication factors include:

- Provide strong leadership to the team
- Regularly schedule meetings with team members
- Ensure adequate communications with stakeholders
- Conduct damage control to resolve problems (communication and delegation)
- Secure and maintain necessary resources to complete the project plan

Controlling the Project

The project is now well underway yet far from completion. Strong communication has been established with all involved entities and is conducted on a regular basis. The project seems to be going fairly well, yet, as we all know; there are always wrinkles to iron out. Change is a wrinkle that can be very small or tear the fabric of the whole project requiring huge adaptation and manipulation to the original project plan. It is during this time that the Project Manager needs to conduct the following activities:

- Monitor all deviation from the plan
- Take corrective action to match actual progress with the plan
- Receive and evaluate the requested project changes
- Reschedule the project as necessary
- Adapt all resource levels as necessary in accordance with plan changes
- Realign the project scope as necessary
- Return to the planning stages, only as necessary

Closing the Project

Depending on the project, it could have been weeks, months or years since project initiation, and all of the diligent efforts have finally paid off. The project is now drawing to a close. If all went according to plan (and amendments) the project met all time and needs requirements and stayed at least near budget. Now we must have proper closure by following the recommended actions listed below:

- Acknowledge achievements and announce results
- Gain knowledge from all aspects of the project experience
- Review the finished project process and outcomes
- Write a final project report covering all aspects of the

project

- Upon project completion, shut down the operations and disband the team, leaving only key personnel to conduct follow-up activities

While the Phases of a Project shown here are quite abbreviated, they display a very good basic outline of actions to be taken during the various portions of a project. Obviously, each action shown in the bullet statements will take some portion of the project time (you did account for that time during scheduling, didn't you?) and many are in fact macro-projects within the overall project. With the exception of the necessary follow-up activities, when all actions are completed they form the culmination of the project.



The Importance of Planning

Now it is time to look a little deeper into the specific actions of Planning that we so briefly overviewed. The steps of planning a project are numerous and require analytical thought. Experience in this area is highly beneficial but remember that we all had our first time in commandeering a project of some sort, at some time. If Project Management inexperience is an issue, then look for information, advice and guidance from people that do have that experience. Never let pride stand in the way of a learning experience. It might be hard for a person to ask for help, but it is harder to fix mistakes caused by a strong ego coupled with a lack of experience. Remember that ignorance is just a lack of knowledge.

In the initial planning of the project, conducting a feasibility and return evaluation will help to determine and substantiate if the proposed project request has merit in the overall return to the enterprise versus the personnel-hours and resources that will be devoted to the project. The information gained will also lend direction in the establishment of goals, objectives, project activities, project structure, as well as resource and time

requirements.

Other project planning guidelines include listing all planned tasks and activities, optimally sequencing all of the planned activities and developing a working schedule and budget for assigning resources. All of this may seem a bit overwhelming, but a vision of the project goals and a dedicated plan of resource utilization will help to make the burden less severe. This is also one of the most important areas to seek help and guidance if at all necessary.

Now that there is valid, definitive and usable information ascertained, that information can be presented to the stakeholders for final approval that it will confirm both their original vision of the project needs and provide additional finite information concerning the logistics of the project. The information presented will define for them the direction of the project, budget information and an overview of milestones and landmark activities. Be aware that the information presented might also reveal that the project may not be in the best interest of the enterprise.

With information in hand, full support of the stakeholders and senior executives, the Project Manager can now finalize the planning stage by creating a detailed planning report showing the most detailed information that has been gained to this point. Additionally, the updated facts and figures will allow further refinement of the project scope.

Additional actions that will be necessary during project planning include:

- Forming a project team. Hand pick the individuals whenever possible and select those individuals based on the skills they can bring to the project
- Initiate and incorporate procedures to track and control the progress of the project aspects such as milestone deadlines, scheduling implementation, progress reports, etc.
- Define the WBS (Work Breakdown Structure)
- STU (Standard Task Unit) should be utilized for repetitive tasks during the project to increase continuity and reduce unnecessary time expenditure
- Create network diagrams to graphically show the relationships between tasks within a project indicating that there is no lag between task completions, or unforeseen overlap of time and resources
- Create an action plan for change. Change is inevitable, and being prepared for change is a virtue. Having some form of an alternative action plan in place when changes do occur will alleviate some frustration, as well as to show the stakeholders backing the project that the Project Manager is prepared for adversities as they may appear

Plan on Change

Since change can cause such adversity to even the best planned projects, it would be beneficial to delve somewhat deeper into the subject of Change Management because change left unattended in Project Management can dramatically alter the direction of the project and attitudes of your project team.

That direction though, can be swayed to the positive by incorporating flexibility during the project planning stage.

There are many ways to handle unforeseen changes. Some must be dealt with as they occur, such as a major fire, flood, etc. Those are huge changes that can cause the demise of not only ongoing projects, but can possibly cripple the whole enterprise. More normal daily changes can be buffered with anticipation, flexibility, float and a review process.

Float is the practice of buffering the project schedule with added time and resources. This is a precarious area where if too much float is added, the Project Manager might be seen as a sloppy planner, which would prove to be a negative in the eyes of the project funding entities. In essence, “I happen to know that Project Manager pads every project by at least 20%, so let’s reduce the requested budget funding by 20%; that should be about right”. This is not a proper way to present or negotiate a budget.

Anticipation and flexibility tend to go hand in hand. Experience will allow (from hindsight) the ability to foresee problem areas that seem to surface in many projects, and the flexibility to plan through those changes as they occur.

Diligent scheduled reviews are mandatory for keeping track of progress as well as changes and trouble areas. Just as a good driver will keep constant vigil on the total environment around his or her moving vehicle, a well versed Project Manager will constantly review the condition of the project. Progress reports, network diagrams, scheduled email reports, verbal communications with the team; always aware of the condition of the different aspects of the project. Total awareness will help to queue the Project Manager when changes (deviations) are happening in a time frame much earlier than if the Project Manager were not aware. Early change detection will allow a timely assessment before the change has a chance to spiral out of control.

Communication Protocol

When thinking about the important aspects of Project Management, communication is one of the most basic yet most important factors involved. Communication is all encompassing in its importance and controls the very basis and outcome of every project. Everything relies on the effective use of communication. Questions, answers, direction, negotiations, proposals, etc, are all aspects of projects that are communicated. Since the importance of communication is a well known fact, there is little reason to further expound upon it. The overall fact about communication that I would like to convey is that the better the communication skills a person possesses, the better that person will be able to sway any situation into his or her favor.

Exactly who does the Project Manager communicate to? Why, it’s the chain of command of course, where proper business etiquette and decorum dictate the standards of communication both up and down the chain of command. It is also quite beneficial to know your chain of command and use that to your advantage during communications.

Each person in the chain of command has respective roles and responsibilities. An example would be the Project Manager who is normally “The individual responsible for the success of the assigned project”. This includes assembling the project team, project charter and other plans, obtaining executive buy-in and overall management throughout the life of the project. The Project Manager normally reports to the Program Manager, and together, they work to support, interact and contribute to the success of the ITAM program. Responsibilities include but are not limited to:

- Deliverables
- Project Reporting
- Contractor, Resource, Budget and Document Management
- Change Management
- Project Plan Creation
- Oversee and Manage IT Projects
- Set Project Criteria, Requirements, Timelines, Scope and Purpose
- Manage Scope and Expectations

Knowing the chain of command, their roles and responsibilities, allows the Project Manager to more fully utilize the available organizational resources.

Conclusion

We have covered the tip of the iceberg that is Project Management. Little is seen on the surface as compared to the immensity of what lies underneath; when properly managed the inner mechanisms work in unison like a clock function. All actions must work in correlation with each other to achieve the planned outcome.

We also understand that that Project Management involves the discipline of organizing, allocating and managing resources to provide the desired end result of the project within a defined scope, budget and time constraints. Effective Project Management is founded on a solid plan, a structured approach and a dedicated team to meet organizational goals.

ITAK Reference Statement

Excerpts of this article were taken from IAITAM Best Practice Library (IBPL) Volume 5 Project Management, IAITAM Best Practice Blue Print (BP2), Wikipedia encyclopedia, Project Management

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