

Chapter 12

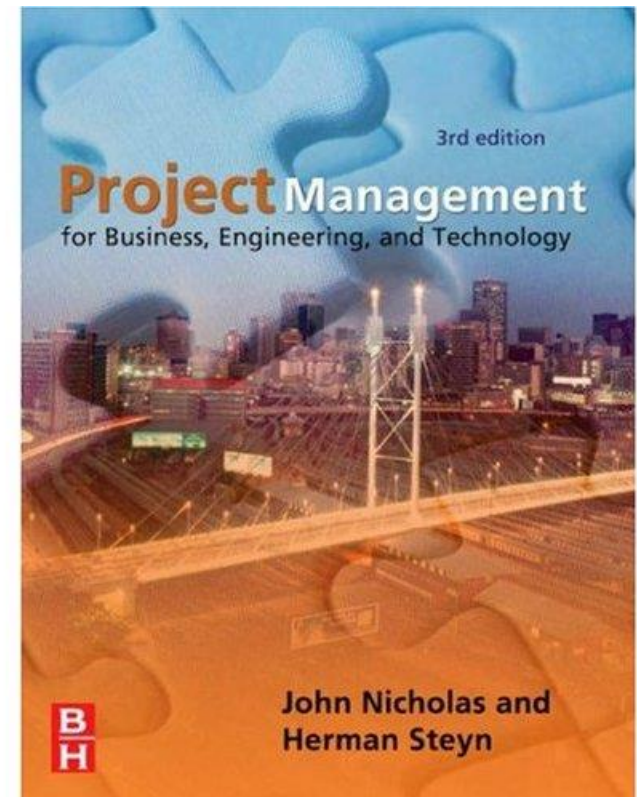
Project Evaluation, Communication, Implementation, and Closeout

Project Management for Business,
Engineering, and Technology

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Project Life Span: Execution

Phase A: Conception phase

Initiation stage
Feasibility stage
Proposal preparation

Phase B: Definition phase

Project definition
System definition
User and system requirements

Phase D: Operation phase

System maintenance
and evaluation

System

Improvement

System

termination

(To Phase A:

— Repeat cycle)

Phase C: Execution phase

Design stage
Product/build stage
Fabrication
Testing
Implementation stage
Training
Acceptance tests
Installation
Termination

Project Evaluation

Formative Evaluation

- Evaluation throughout the life cycle
 - Purpose: to guide the project
 - Asks: “What is happening?” and “How is the project proceeding?”
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Project Evaluation

Summary Evaluation

- Evaluation after the project is completed
 - Purpose: appraise project and assess end-item or outcomes
 - Asks: “What happened?” and “What were the results?”
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Communication Plan

- Addresses all project communication—formal and informal, verbal and written
 - Includes tentative schedule for formal design and management reviews, milestone meetings, etc.
 - describes meeting formats, itineraries, preparations, attendance, and leader.
 - Points of contact: customer, contractor, vendors, subcontractors, supporters, others.
 - Kind of communication needed for each (next slide)
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Project Communication Plan

The Communication Plan is a matrix that details the type of project communications, who receives, and how often.

- 1) Identify parties and roles who require project communication.
- 2) In the 1st column, list parties by role, by group name, or name.
- 3) Identify types of communication needed.
- 4) List communication types across the top row.
- 5) Complete the grid by placing an “X” in the intersecting rows and columns.
- 6) Replace the role description with a person’s name. In the (freq) section, indicate how often the communications take place.

The parties and types of communication listed here are for example only. Project Managers should create a communication plan specific to each project.

Project Information			
Project Name		Initial Release Date	
Project Number		Last Revised Date	
Project Manager			
Client			
Author			

Role/type	Meeting/report													
	Status meeting (frequency)	Status meeting minutes (frequency)	Business feasibility	Information request	Technical feasibility	Business brief	Project plan (frequency)	Problems and issues (frequency)	Business study	Use case analysis	System architecture	Detailed technical design	Other	
Client	X	X	X			X	X	X	X	X				
Relationship manager		X	X	X	X	X	X	X	X	X	X			
Business analyst	X	X	X			X	X	X	X	X	X			
Project manager	X	X	X	X	X	X	X	X	X	X	X		X	
Client project team	X	X	X			X	X	X	X	X				
IT project team	X	X					X	X	X	X	X		X	
Client director		X	X			X		X	X				X	
IT director		X	X	X	X	X	X	X	X	X	X			
Project sponsor		X	X			X			X					
IT VP		X	X						X					
Architect	X	X	X	X	X	X	X	X	X	X	X		X	
Security/audit	X	X	X		X			X	X	X	X			
Internet operations	X	X	X		X		X	X	X	X	X		X	
Intranet operations	X	X	X		X		X	X	X					
Legal/corporations communication		X	X		X			X	X					
Other														

Figure 12-1
Sample communication plan.

Project Review Meetings

Purpose

- communicate and assess project evaluative information
 - identify and quickly correct deviations from project plan
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Project Review Meetings

Informal Reviews (“Peer Reviews”)

- Held frequently and regularly
 - Involve members of the project team
 - Focus on project status, special problems, emerging issues, and project performance
 - Participation depends on project phase and issues at hand
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Project Review Meetings

Daily Standup Meeting

- Held at the start of each day
 - Short (15 minutes) and to-the-point
 - An update on status
 - team members give a quick run-through of yesterday's progress and today's next steps
-

Project Review Meetings

Formal Reviews

Scheduled at milestones or critical project stages; e.g.,

- Preliminary review
 - Assess how well the functional design specifications fit the basic operational requirements
- Critical review
 - Check design for conformance to the preliminary design specifications
- In phased project planning approach, decision to continue project based upon results of the review
- **Project audit**
 - Review initiated by customer to assess project progress

Project Review Meetings

Action Plan

- *Created for each identified problem*
- *Might include (see next slide)*
 - *statement of the problem*
 - *objectives in resolving it*
 - *the required course of action*
 - *target date*
 - *person responsible*
- Each meeting starts with a status review of items on the action plan.

Sample Action Plan

<u>Problem area</u>	<u>Objective</u>	<u>Actions</u>	<u>Who</u>	<u>When completed</u>
1. Planning and scheduling	1. Establish backup support for each system.	1. (A) Discuss systems with analysts who support them; formulate plan for each system.	Project leaders and analysts	January 1
	2. Review all systems. Eliminate those not used; clean up others.	2. (A) Prepare questionnaire on system status.	Ron Gilmore	November 15
		2. (B) Complete questionnaires.	Analysts and programmers	December 1
		2. (C) Determine status and specific actions.	PL, analysts and programmers	January 31
	3. Provide information on purposes and uses of new project management system.	3. Prepare seminar on PMS and present to staff.	Joan Gibb	Before March 1

Figure 12-2

Project Life Cycle: Implementation Stage

Phase A: Conception phase

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Proposal preparation

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and evaluation

System

Improvement

System

termination

(To Phase A:

Repeat cycle)

Phase C: Execution phase

Design stage
Product/build stage
Fabrication
Testing

Implementation stage

Training

Acceptance tests

Installation

Termination

Implementation Stage

- User acceptance
 - User training
 - User acceptance tests
 - Modifications
 - Final user tests
 - System installation and conversion process
 - Parallel, pilot, cold turkey
 - User approval/punch list
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Installation/ Conversion Strategies

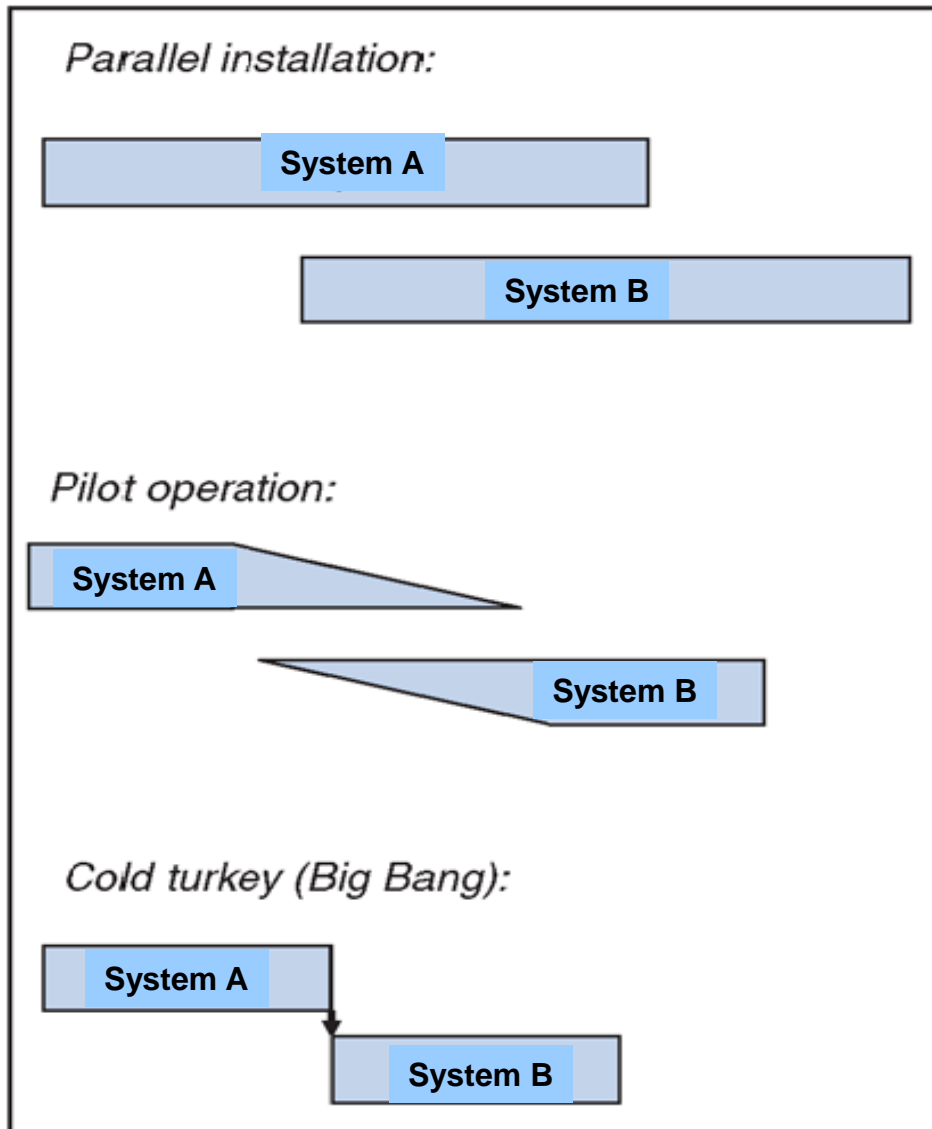


Figure 12-4
Three strategies for system conversion.

Project Life Cycle: Termination and Closeout

Phase A: Conception phase

Initiation stage
Feasibility stage
Proposal preparation

Phase B: Definition phase

Project definition
System definition
User and system requirements

Phase D: Operation phase

System maintenance
and evaluation

System

Improvement

System

termination

(To Phase A:

— Repeat cycle)

Phase C: Execution phase

Design stage
Product/build stage
Fabrication
Testing
Implementation stage
Training
Acceptance tests
Installation

Termination/ closeout

Termination and Close-out

- Termination

- Planning of close-out
- Final close-out
- Post-completion project summary review/postmortem



Termination and Close-out Responsibilities

Planning, scheduling, and monitoring completion activities:

- ❑ Prepare and coordinate termination plans and schedules
 - ❑ Plan to reassign project team personnel, and transfer resources
 - ❑ Monitor termination activities and completion of all contractual agreements
 - ❑ Monitor disposition of surplus materials and special project equipment
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Termination and Close-out Responsibilities

Final close-out activities:

- ❑ Close out all work orders
 - ❑ Approve completion of all subcontracted work
 - ❑ Notify all departments and stakeholders of project completion
 - ❑ Close project office, project facilities, and project books
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Closing the Contract

- Attention to side-items vs. end-items

- Manuals
- Tools/peripherals
- User training
 - E.g., simulators



- Negotiated adjustments to final contract

Project Summary Evaluation

Post-completion Project Review

(Postmortem): Reviews:

- Initial project performance, cost, and schedule objectives
- Soundness of objectives in view of initial problem or needs
- “Needs” that the end-item was supposed to fulfill



Project Summary Evaluation

Post-completion Project Review

Reviews (cont'd):

- Evolution of objectives; reasons for changes
- Project performance with respect to final objectives
- Effectiveness of project management; relationships among managers, project team members, subcontractors and suppliers, and customer
- Termination process: customer reactions and satisfaction

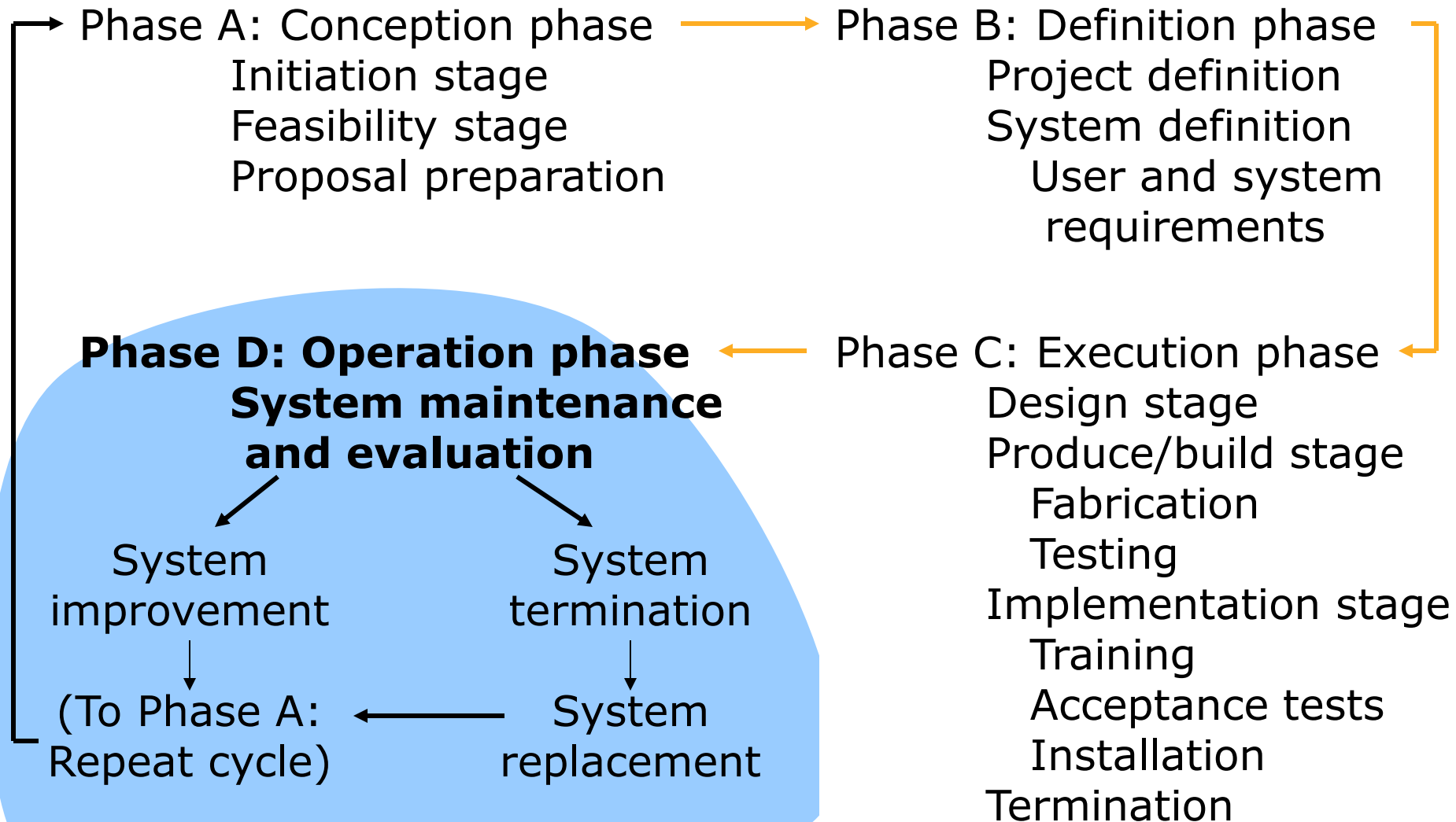


Project Summary Evaluation

Post-installation System Review

- Evaluates the fully operational end-item system
 - Focuses on the end-item system
 - Provides operation and maintenance information for the system's designers
 - Addresses
 - Is the end-item doing what it was intended to do?
 - Is the user getting the expected benefits
 - What changes to the system would fulfill the user's needs?
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Project Life Cycle: Operation Phase



Phase D: Operation

- Project ends with completion of Phase C, project manager goes on to another project and core team disbands
 - Sometimes, SDO remains involved with customer and end-item in some principal aspect of operation
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Phase D: Operation

- System review Maintenance
 - Repair/preventative
 - Standard, periodic
 - Post-installation

 - Enhancement
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