Getting it Done:
Project Management 101

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Associate Registrar
What is a project?

A project is defined as a unique undertaking that has a definitive beginning and end.
Project Basics

- A project needs a specific goal
- A project has a time line
- A project has a final outcome or result
- A project has a budget and requires resources
- A project requires a plan of action defining what needs to be done, when and by whom
- Projects can be evaluated on their own
What is a project management?

• The facilitation of the planning, scheduling, and control of all activities that must be done to meet project objectives. It is a disciplined way of organizing a job.

• The process of guiding your project from its beginning through its performance closure.

• Project management is the process and techniques to follow when you are doing something you have never done before or trying to improve something you have done before.
ASSIGNED AS PROJECT MANAGER

PROJECT MANAGES ITSELF
Basically, the Project Manager puts all the pieces together so the project gets done and makes sure the wheels stay on the bus.

He/She also gets to take the blame if the project fails or performs poorly.
BAD PROJECT MANAGEMENT
To succeed with your project, you must effectively manage:

• **PEOPLE:** Team members, management, other stakeholders in the project

• **PROCESSES:** Plan, organize and control the work; make decisions; resolve conflict

• **SYSTEMS:** Procedures, other sources of information affecting how project activities are performed, and how associated resources are assigned and tracked.
Leading a Successful Project

• Plan and define the charge (avoid scope creep)
• Prioritize objectives
• Define key resources (budget and people)
• Develop a timeline and schedule
• Identify tasks and delegate; break the project down into smaller definable milestones if necessary
• Work out a communication plan—meetings, how communication will be handled (both internal and external). Keep management in the loop.
Leading a Successful Project

• Work with the team on “selling the plan.” Gather support and buy-in from constituents.

• Software tools to manage project (follow task details and timelines) Microsoft Project, Open Workbench, Base Camp, and many others—decide on one and learn to use it well!

• Project closing—Define “complete.” Ask what lessons were learned? Evaluate how the project went and document both the positives and negatives.
Case Study 1

Concur Rollout
We are moving everyone to Concur. You are required to use it as of now. Here’s a website with directions.

Good luck!
WHAT WE HAVE HERE

IS A FAILURE TO COMMUNICATE
Case Study 2

CourseLeaf CLSS Rollout
Previous process:

• For the 2014-2015 academic year, Rice offered over 5300 course sections for registration.

• The process for creating the course schedule involves OTR printing several thousand pages of draft schedules each semester and sending them to departments for review. These drafts are routed back to OTR, and they are then manually processed. Each section being updated may have more than one update, not including the nearly 300 sections that are canceled by departments. This process happens twice a semester, each semester.
Problems with the previous process:

• The entire scheduling process is labor intensive for departments, school, and OTR, and the manual nature can (and does) introduce errors at every step in the process.

• It is during the course schedule process that departments select the time that the course will be offered. Per the Space Task Force (2013) recommendation, departments should schedule courses inside standard time blocks, but this is oftentimes not the case. For the proposed Spring 2016 schedule, there were 549 proposed sections that did not meet in standard time blocks. This creates inefficiencies for student schedules and for classroom utilization.
The Proposal

Proposed process:

- Perform scheduling tasks online and in real time, including: online editing, planning, visualizing, validating, and approving of the course schedule.

Advantages:

- Fewer manual entry errors
- Ability to proactive plan and plan holistically. If resources look slim, we can address it before registration starts.
- Staff are freed from data entry.
Implement an electronic scheduling software as the sole source of course scheduling at Rice.
Prioritize Objectives

1. Identify a tool to complete task
2. Purchase tool
3. Refine tool to meet Rice business practices
4. Train community
5. Media campaign
6. Eliminate paper process completely
Identify Resources

- Find money for tool development or purchase
- OTR Staff (management and support/professional staff)
- Administrative Systems
- Leepfrog
- Peer institutions
- Departmental Scheduling Staff
- Departments
Develop a Timeline

- March - April 2016: Finalize contract between Rice and Leepfrog
- April - May 2016: Perform initial data discovery and analysis of Rice business practice
- June 2016: Begin customization of CLSS for Rice's business practices and scheduling needs
- July-Mid August 2016: Finalize customization and test CLSS to ensure CLSS meets Rice's requirements
- August 8, 2016: Email to departments regarding training time selection
- August 30-31, 2016: On campus training for department and school schedulers for CLSS usage
- August 31, 2016: Launch of the Spring 2017 scheduling process through CLSS
- September 23, 2016: Design Mode ("Round 1") ends. All initials should be submitted on or before this date.
- October 2016: Follow-up with departments regarding the scheduling process and further fine-tune CLSS
- February 2017: Spring 2017 scheduling ends; project finished
All that is great.
But what about the details for you to implement in timeline?

That’s what the wiki is for.
Sell the Plan and Communicate

• Meet and document with the wiki (internal)
• Visited several individual departments and schools prior to launch and several one-on-one meetings post-launch
• Website pages to announce
• On campus training and documentation
• Emails and timelines to facilitate
• Individual conversations to keep morale up
Sell the Plan and Communicate

- Wiki *(internal)* to document and meet up
Sell the Plan and Communicate

- Visited several individual departments and schools prior to launch
Sell the Plan and Communicate

• On campus training and [documentation](#)

![Image: I MADE YOU A WIKI
SAVE YOURSELF](memehumor.com)
Sell the Plan and Communicate

• Emails and timelines to facilitate
Rice has purchased software (CourseLeaf CLSS) to assist in the creation and development of the course schedule. This will help us achieve more efficient course and classroom scheduling, make it easier for departments to meet the two-thirds rule for prime time classroom usage, and create transparency across departments and schools to proactively address scheduling issues before they occur.

The Office of the Registrar and Administrative Systems are currently in the middle of implementation of this software package. Later on this month, we will provide an update on the status of the implementation, as well as the next steps that need to be taken, including training for departments. We will use the software for Spring 2017 course scheduling when the schedule build process begins in August 2016.

We have created a webpage that highlights the timeline for CLSS, as well as a few additional items: <<LINK>>. If you have questions or concerns about the process, please contact Justin Schilke, Associate Registrar (x3157, jschilke@rice.edu).
Sell the Plan and Communicate

### CLSS Stages Quick Tip Sheet

<table>
<thead>
<tr>
<th>Mode</th>
<th>Design</th>
<th>OTR Work</th>
<th>Refine</th>
<th>OTR Work</th>
<th>Refine</th>
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</thead>
<tbody>
<tr>
<td>Phase</td>
<td>Plan (First Round)</td>
<td>Locked</td>
<td>Plan (Final Round)</td>
<td>Locked</td>
<td>Publish</td>
<td>Rooms</td>
<td>Publish</td>
<td>Publish (2nd POT)</td>
</tr>
<tr>
<td>Early development of the schedule; the vast majority of changes should occur at this time</td>
<td>Final changes before the schedule goes live for students and the campus community to view. You should only be making minimal corrections at this point and adding/deleting only a few classes</td>
<td>Registration period when schedule is live to the community and students are either registering for classes or placing them in the ESTHER Course Registration Planner</td>
<td>OTR assigns rooms</td>
<td>Classrooms have been assigned and student registration continues</td>
<td>All items, except for changes to an instructor, for the Full Term and 1st Half of Full Term are locked; changes may only be made to 2nd Half of Full Term and MBA courses</td>
<td>CLSS is locked for all sections; no changes can be made to any section</td>
<td></td>
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<tr>
<td>Add and delete classes, adjust existing offerings, plan around other department schedules</td>
<td>Baseline will consist of the previous years like term (Spring 2017 will have Spring 2016’s final schedule)</td>
<td>Only very minor changes to the schedule should be made</td>
<td>The same changes can be made that can be made in Publish phase, however changes to some items will trigger a workflow because it could affect room assignments</td>
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<td>Live enrollment counts are visible in CLSS once registration begins</td>
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<tr>
<td>This information will not yet be viewable to the campus community</td>
<td>No data will be updated directly in Banner—must be submitted as a whole</td>
<td>Live enrollment counts are visible in CLSS once registration begins</td>
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<tr>
<td>No data will be updated directly in Banner—must be submitted as a whole</td>
<td>OTR will send info to CLSS such as new topics, course additions, and catalog changes every night</td>
<td>When enrollment exists on a section, no edits are allowed to instructional method, meeting time, part of term (session), status, or the waitlist</td>
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<tr>
<td>Delete classes, do not cancel in “Status”</td>
<td>Press “Validate” to send finalized schedule to the OTR</td>
<td>All edits sections will go through the pertinent workflow and will appear in Banner immediately after approval</td>
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<tbody>
<tr>
<td>Week 2–Week 3</td>
<td>Week 6</td>
<td>Week 7–Week 9</td>
<td>Week 11</td>
<td>Week 12 – Week 16</td>
<td>Thru Sp17 Week 2</td>
<td>Week 3 – Week 7</td>
<td>Week 8+</td>
<td></td>
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Sell the Plan and Communicate

- Individual conversations to keep morale up
• Went live on 8/30 with a reset on 8/31
• All scheduling units required to participate; no exceptions were made.
Close the Project

- CLSS fully launched for Spring 2017 scheduling
- Follow-up with departments after registration

Project will be considered complete on Monday of Week 8 of Spring 2017, and then we move into the “after” phase: maintenance.
Close the Project

Success or failure?
"There is a subset of people who go into administration purely as an expression of their spite toward humankind."
What We Learned – The Good

• Rice is small and unconventional, and top-down approaches do NOT work; individual touch and meetings eased departments
• Provide people information and tools to do it on their own after you leave
• Media/communication is your friend
• Well-connected advisors/faculty/coordinators can be your biggest ally in certain projects (other times, it might be the students)
• It was important to show the community it worked and saved time
What We Learned – The Bad

• Some people will never like what you are doing…period
• Don’t bite off too much at once. Nibble at the pieces, and you’ll get it done.
• Don’t neglect software updates/patches and be sure to monitor the tool regularly
• Plan out the project thoroughly ahead of time, use tools, know who is doing what, and hold them accountable
I have made a terrible mistake
1. They are afraid to present the real status of a project. They would rather spin positive information than reveal negative information.

2. They let themselves be bullied by team members not wanting to plan or document.

3. They are afraid to ask for what the project needs (more money, resources, time)

4. They don’t see the value in following a methodology until the project goes wrong.

5. They fail to properly account for risk.
6. They don’t motivate their teams to get the best from them everyday.

7. They don’t use proper scheduling tools, making it impossible to understand if they are ahead or behind schedule.

8. They create documents because they are supposed to, not because they understand why they should be done.

9. They don’t develop the team; they let the team come together without a leader.

10. They think that if they plan properly, then nothing will go wrong with the project.

Available Tools

• Trello (free)
• Producteev (free)
• Basecamp
• Wrike
• Teamwork Projects
• Zoho Projects
• Clarizen

And lots more…
IT'S DONE.

THE PROJECT MANAGEMENT COURSE IS FINALLY OVER!