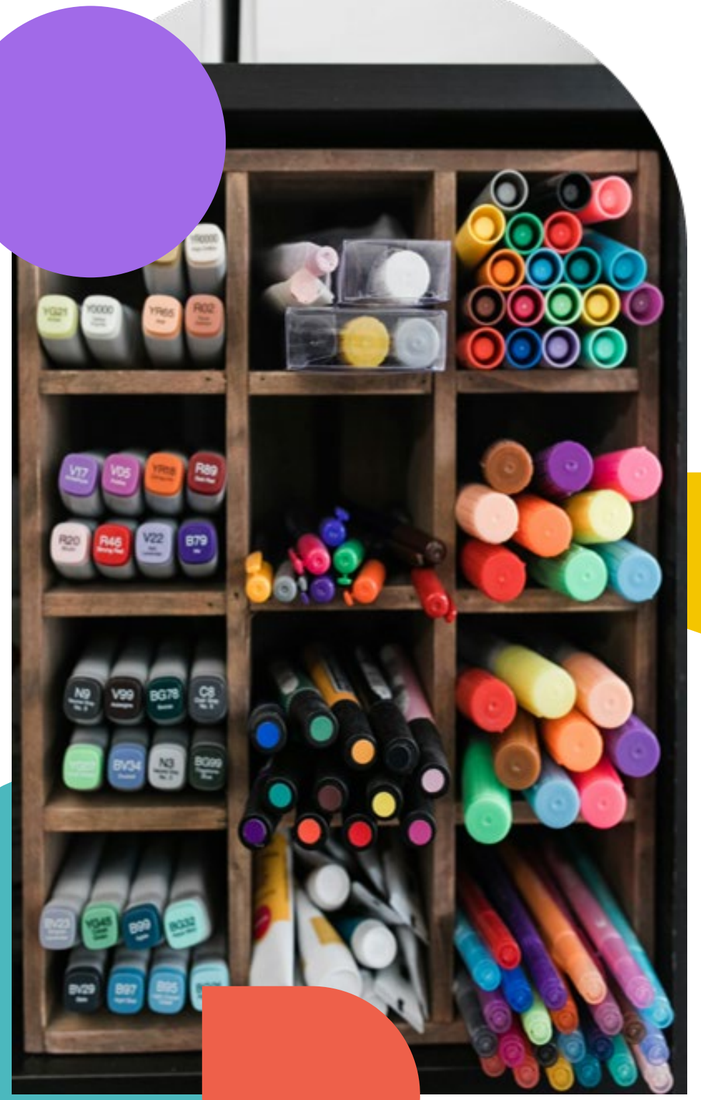
Reflecting on project management:

Incorporating best practices and learning from our experiences



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Agenda

- Project Management 101
- McGill's context
- What we did
- Key takeaways

Project management 101

A project is a **temporary endeavour** to create a product or service

Scope

What are we doing? What are we not doing?

Outcomes

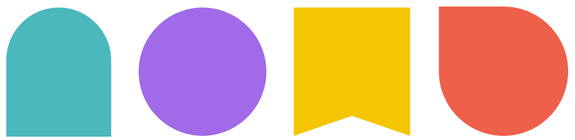
What product or service will exist after the project has concluded? How will it impact our audience?

Risks

What can go wrong? How do we mitigate it?

Communication

Internally (with the project team) and externally (with everyone affected by the project)



Heads up on jargon

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You don't have to be an official project manager to use these tools

All concepts can scale up or down

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McGill's Context

Library Technology unit

12-person department

Oversees:

- Digitization
- Digital collections
- Discovery systems
- Application development
- Website
- Specialized hardware and software support

Types of previous projects

- Offsite storage facility integration
- Digital exhibition platform launch
- Large digitization projects
- System migrations
  - Staff intranet
  - Institutional repository
  - Discovery system

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Lots of project experience

…But often informally learned and not always consistent and concerns about team satisfaction (even if the project was done "on time" and "successful" from a traditional viewpoint)

What did we do?

Formalizing processes

Reviewing documentation and processes

Learning from our past

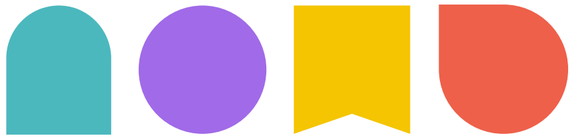
Reviewing our retrospective process

Project charter

Issued by the project initiator or sponsor; formally authorizes the existence of a project

Provides the project manager and team with the authority to use an organization's resources for a project

Defines details like objectives, scope, deliverables, and the resources required



- Brought **clarity and specificity** to several fields in the charter
- Introduced additional **opportunities for critical reflection** throughout the charter creation process
- Added fields to bring **context for new team members** or future team members who will read your documents to learn from them

Project charter

Clarity and specificity

- Define success criteria before the project begins
- List team members responsibilities and clarify who has decision-making authority
- Add tooltips to specify how fields should be filled in

Opportunities for critical reflection

- Conduct a project pre-mortem
- Review past projects &ensure lessons from the past are remembered and applied

Context for incoming team members

- Restate the problem you are trying to solve
- Link to supporting documents

Not all components will be necessary for all projects

Project Name:

Statement of Problem/need:

Project Goal:

Project Summary:

What constitutes success? How will we measure success?

[Add a paragraph of context for success criteria if the table isn't sufficient]

Success criteria	Method of measurement (may be qualitative or quantitative)

Project description

Assumptions or dependencies?:

Project risks/Pre-mortem *(answer: what could go wrong?)*:

Features (deliverables) in scope:	Features (deliverables) out of scope:

Workflow to handle scope change requests (e.g., process and who has final say over scope change):

List any lessons learned from previous project retrospectives applicable to this project:

List of user groups and profiles impacted in this project (e.g., students, alumni). Outline here any specific needs.

Unique library needs (applicable only to projects with external stakeholders): Identify here any unique library needs to be communicated

Related documents (e.g., reports, intranet pages) that give additional context:

Project context

High-level Timeline:

[Can format as a table with deliverables and due dates, or as a Gantt chart. If you are using MS Planner for your task list, summarize the Planner outline, don't repeat the task list here]

Communication plan (internal to project group):

- *Frequency of communication, method (e.g, intranet, Teams, emails, meetings)*
- *Who is responsible for communicating with different parties/ different subgroups on the project (if applicable)*
- *Where are decisions documented and by whom?*

Communication plan (external users and stakeholders):

- *Frequency of communication, method (e.g, intranet, Teams, emails, meetings)*
- *Who is responsible for communicating with different parties/ different subgroups on the project (if applicable) and documentation*
- *See example*

Status updates

[how often PM will prepare a status update document, etc., who will receive the status update document and where will it live]

See intranet template - Project Status Update

Communication details

Project Team Members, Partners, Stakeholders, and other interested parties

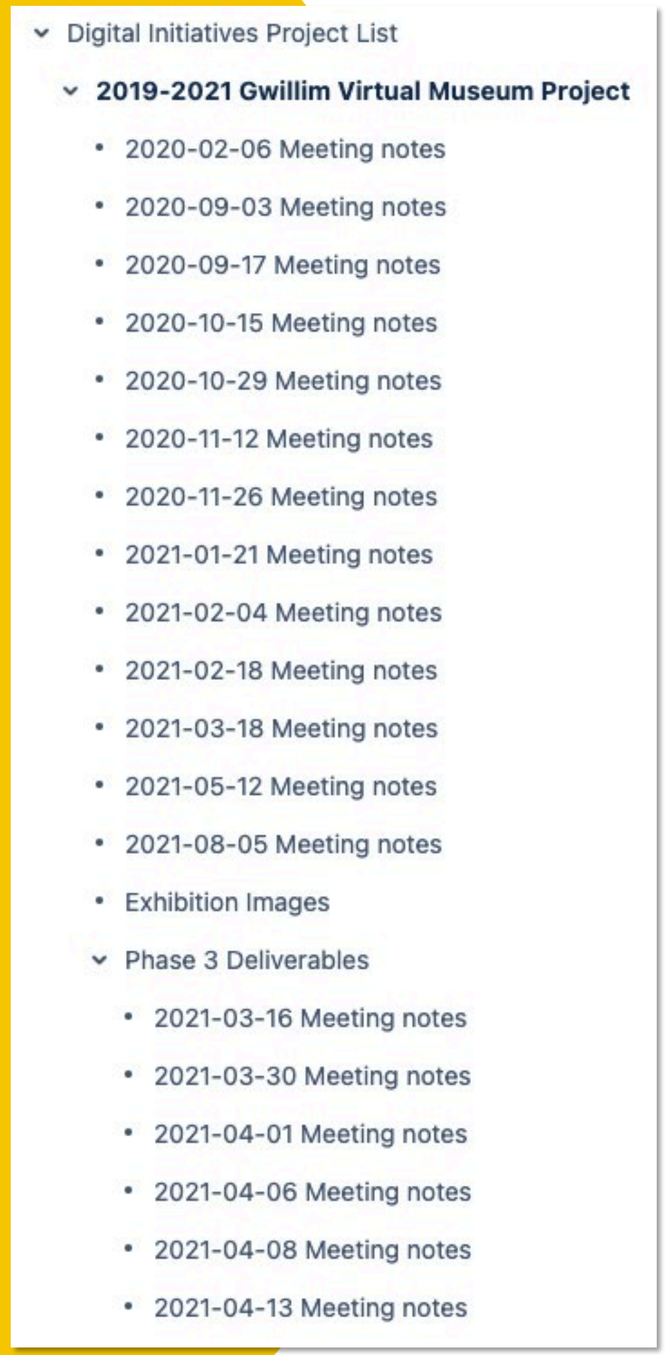
Name	Role	Responsibilities (e.g., note taking, vendor liaising, decision documentation, training, stakeholder communicating, testing etc.)	Has decision making authority on?:

Signatures

Name	Charter approved?	Date

Personnel

Instead of hunting through a never -ending list of meeting minutes to figure out why we made a specific decision…



Now we compile regular project status updates.

Task	Original due date	Status and notes

Project retrospective

After a project has concluded, a retrospective brings together the whole team to reflect on the project and discuss:

- What went well?
- What didn't go well?
- What can we do differently in the future?

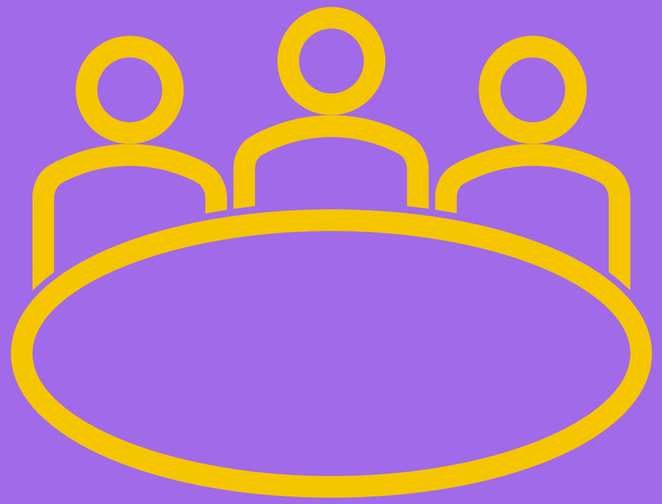
- Assign a **neutral facilitator** and note taker
- Encourage **open and honest conversation** that is free from blame
- Identify **action items** or lessons to apply to future projects

Ground rules

- Start on a positive note
- Follow the agenda
- Be solution-focused
- Assume positive intent
- Respect different thoughts &opinions
- Remain open to new ideas
- Resist the urge to place blame

Process

- **Start:**
  - Review what is a project retrospective and what it's for
- **First 5-10 minutes :**
  - Review basics of project
- **Following 30- 40 minutes :**
  - Discuss three questions
- **Last 15 minutes :**
  - Based on discussion, make a set of recommendations



At the end:

- Short summary report written and shared including recommendations and actions

Example:

What went well

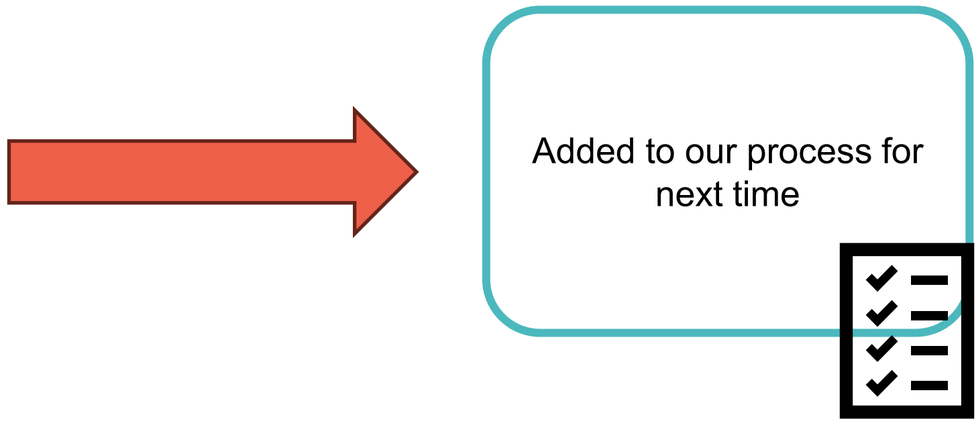
- Team work
- Adjusting to changes in schedule

What didn't go well

- Communication between teams
- Unrealistic timeline

What can we do differently in the future?

- Determine who has decision making authority at the start
- Identify how we will communicate internally/between teams
- Conduct more thorough work breakdowns before setting a timeline



Instead of cryptic or ambiguous notes about where we went wrong…

- Deciding the tool for the job without conducting analysis of the project needs and the technical requirements; fitting the tool to the project
- Being pressured into a grant application without time to review the capacity/requirements/ set proper parameters
- Grant drove decision making which hindered development of Spotlight to its full potential

Now we explicitly name and describe the impact of each problem.

Issue name	Description of issue	Impact on project

How well does this work in practice?

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What concepts can I apply in my context?

Take a moment and chat with your neighbour

Key takeaways

Solid documentation and processes can set you up for success

Ensure that you make time/set a process to actually apply the lessons you learn

Make your documents clear, thorough, unambiguous tools for communicating with your future colleagues (+ your future self!)

Concepts can be scaled to projects of any size. Take what you need and leave the rest!

Questions?

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Download our PM documentation templates via OneDrive

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