



**AIRA**  
AMERICAN IMMUNIZATION  
REGISTRY ASSOCIATION

# Getting the Most out of Your Project Management Tools and Resources

AIRA Discovery Session

July 23, 2018

4pm Eastern

# Project Management Can Be Complex

- ✓ Lots of different roles involved
- ✓ Lots of detail
- ✓ Lots of dependencies
- ✓ Lots of lingo and acronyms

RTM?

PM?

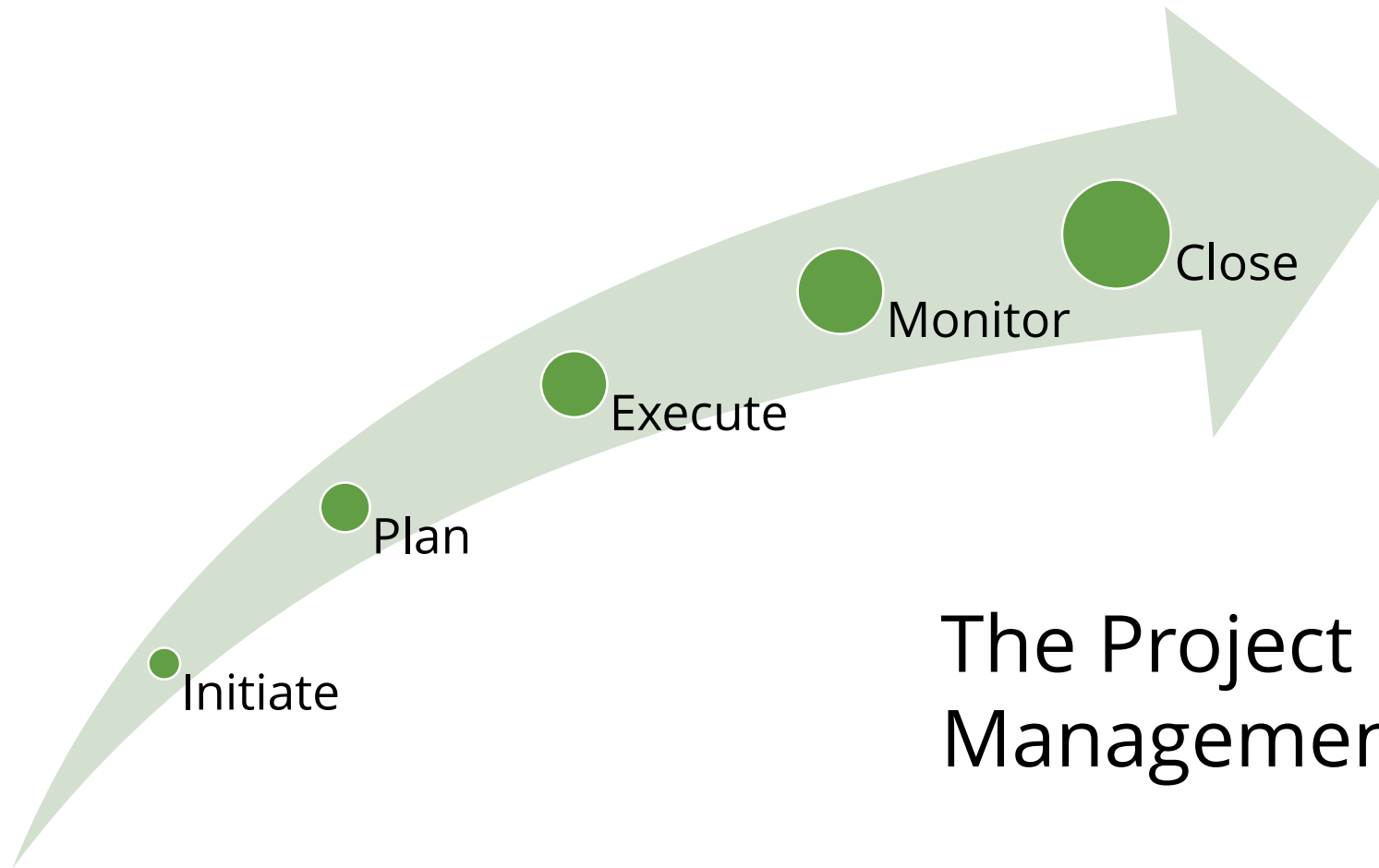
RAID?

SLA?

UAT?



Today, we hope to give you some tools to best leverage your own resources



The Project  
Management Lifecycle



# Today's Actors:



- Maria Volk, Assistant Branch Chief, California Immunization Program
  - Playing the role of Project Lead



- Marcey Propp, Project Manager, HLN Consulting, LLC
  - Playing the role of Project Manager - Contractor

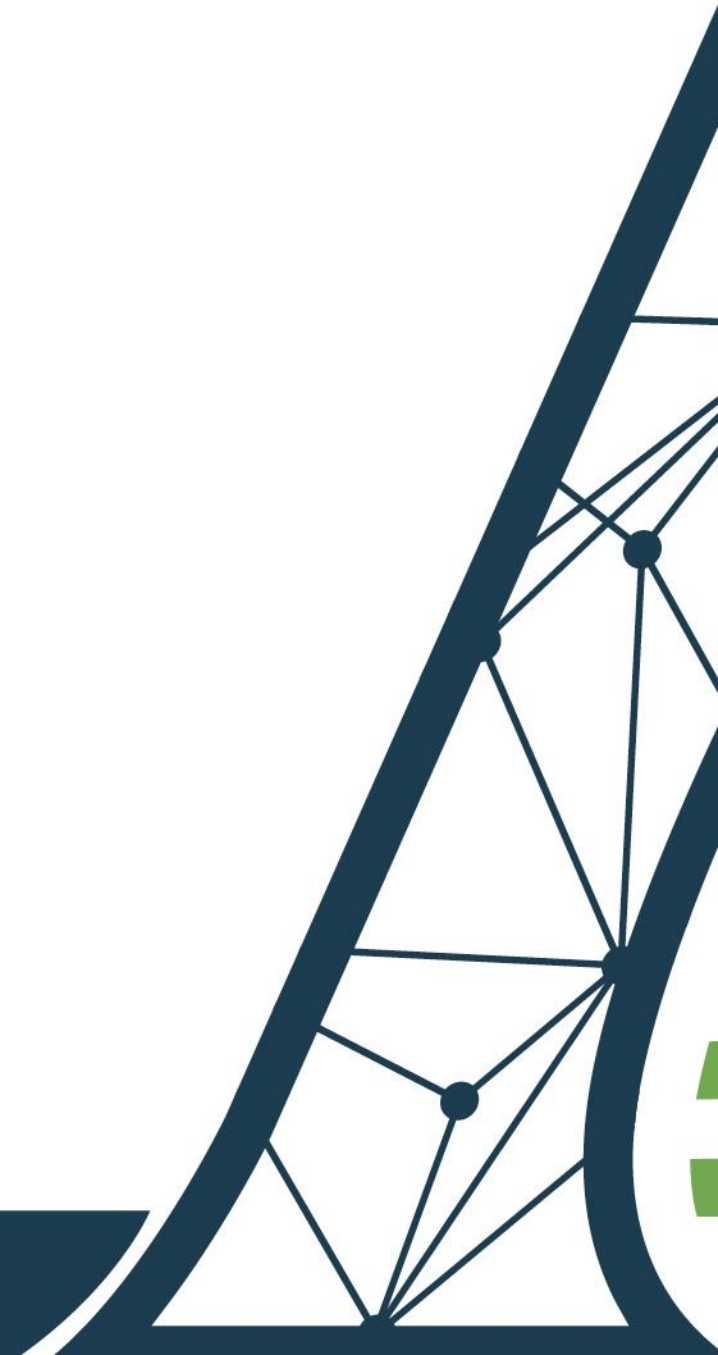


- Katie Reed, IIS Capability Leader, DXC Technology
  - Playing the role of IIS Vendor Project Manager



# Phase 1 - Initiate

Maria Volk



# Phase 1: Objective and Goals

- **Objective**

- Define the project purpose, scope and objectives

- **Goals**

- Identify the opportunity or problem to be solved
- Garner executive support and funding
- Obtain approval to initiate and kick-off the project



## **Project Lead (IIS Program)**

- Develop business case
- Obtain approval to initiate project
- Secure funding
- Negotiate vendor/PM contracts



## **Project Manager (Contractor/IT)**

- Draft charter



## **Project Manager (IIS Vendor)**

- Review project artifacts and existing documentation
- Conduct kick-off meeting



# Kick-Off Meeting (Typically planned by IIS Vendor PM)



- Goals

- Create or confirm common vocabulary/references/acronyms
- Confirm project expectations/assumptions
- Provide early opportunity to identify possible misalignments and address before they can create havoc

- Activities

- Optimally meet face to face
- Formally walk through SOW or Contract
- Introduce and Review Roles and Responsibilities of primary project team



# Phase 2 - Plan

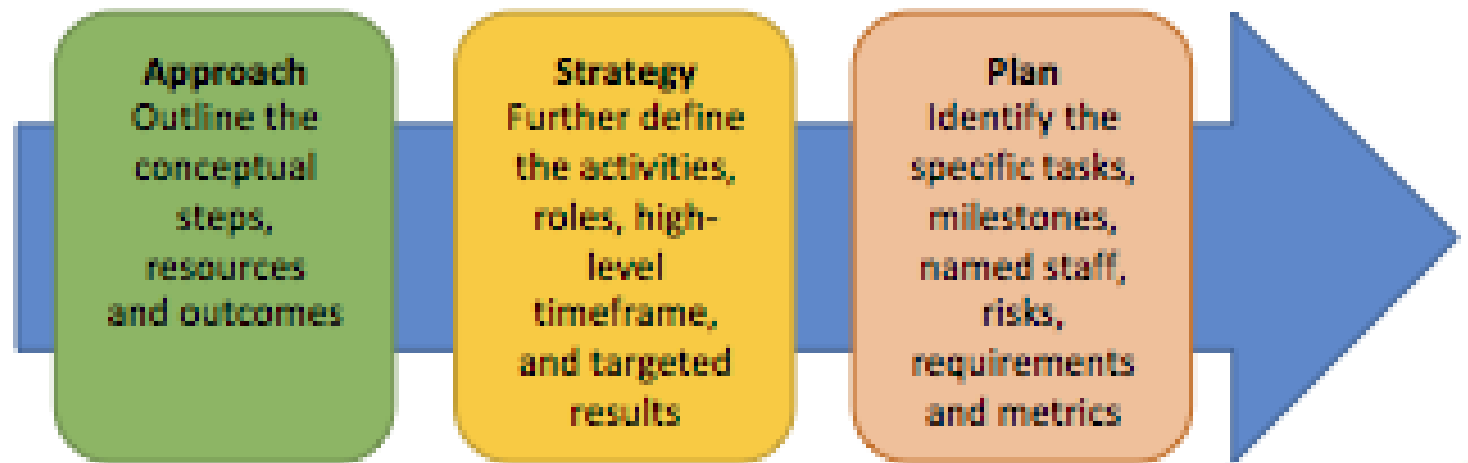
Marcey Propp





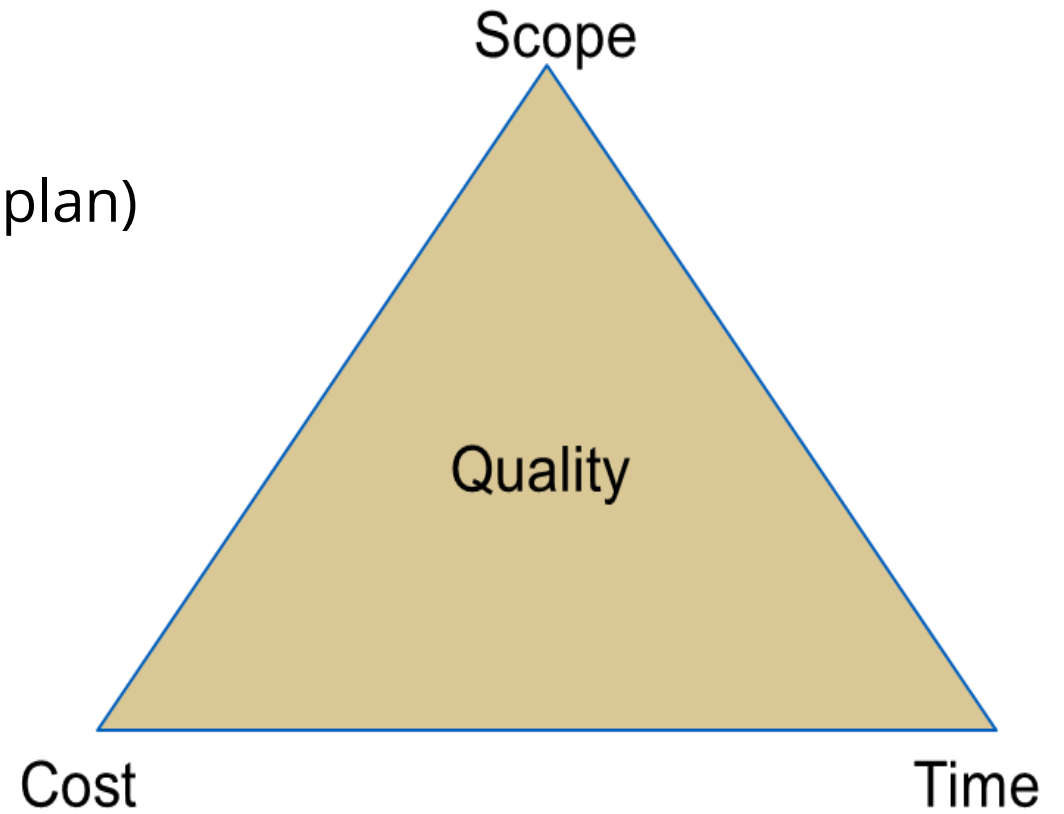
# Phase 2: Plan Objective and Goals

- **Objective**
  - Clarify how project will be executed, monitored and reported
- **Goals**
  - Project approach and timeline defined and agreed
  - Key stakeholders and roles identified
  - Resources available and committed for project duration



# Project Management Plan

- A formal document that provides further detail on:
  - Project scope
  - Milestones/tasks
  - Level of effort
  - Resources
  - Schedule (project plan)
  - Dependencies
- Defines the basis for all project work.
- Describes HOW the project will be executed, monitored and reported.
- Could be summary or detailed definition; adjunct to the charter.



# Planning Artifacts

- Project Management Plan – Can be inclusive artifact or reference subsidiary management documents, such as:
  - Resource forecast
  - Communication plan
  - Training plan
  - Test plan
  - Implementation plan
  - Maintenance and operations plan
  - Project closeout plan
- Project Schedule
- Requirements Traceability Matrix (RTM)



- Review/approve artifacts
- Commit project resources
- Establish project governance



- Draft the PMP
- Assemble project team
- Create RAID Log



- Draft project schedule
- Draft RTM



# Checkpoint: Where Should a Program Be At The End of Planning?

At the very least, the program should be comfortable with:

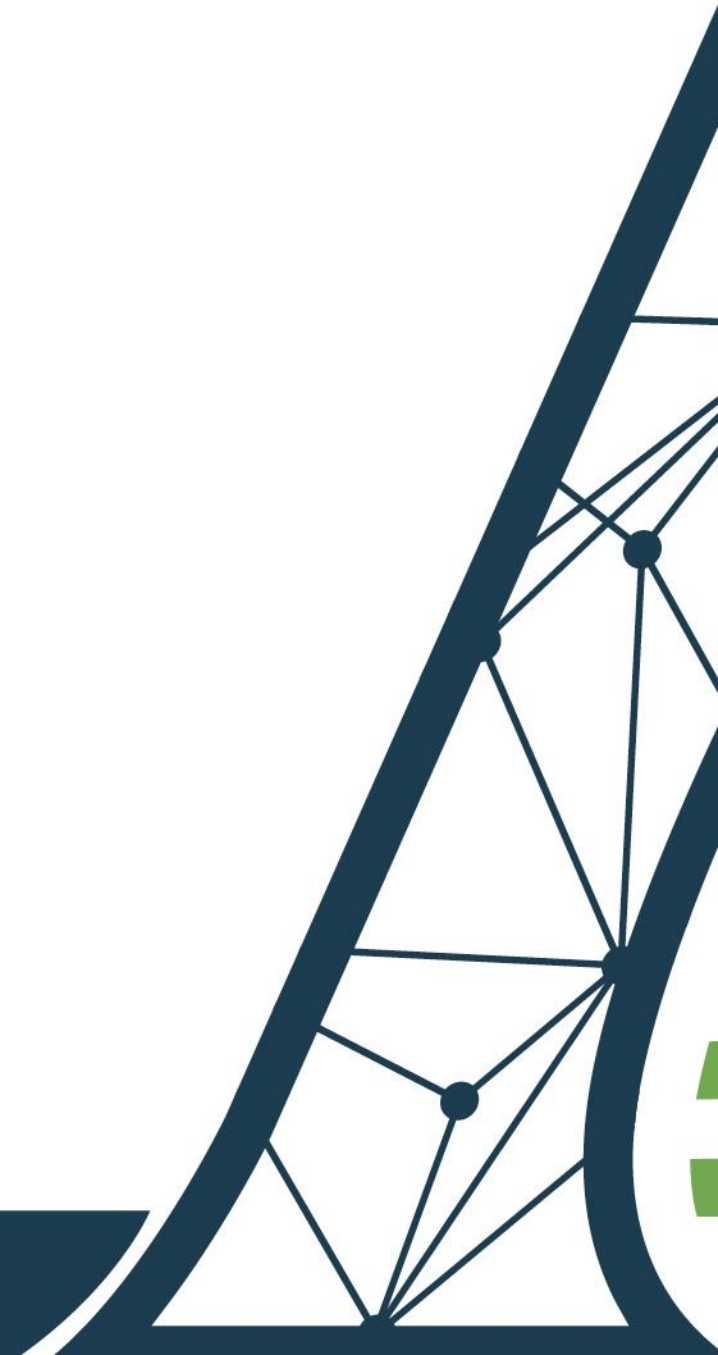
- ✓ Requirements
- ✓ Timelines
- ✓ Roles and Responsibilities (who is doing what)

*If not, challenge your PM(s) for more information!*



# Phase 3/4 – Execute and Monitor

Katie Reed



# Ongoing Project Activities

- Weekly project status meetings/status reports
  - Review items in progress
  - Review Schedule and possible variations
  - Review risk points
  - Discuss open Issues
- Communication/Risks, Actions, Issues, Decisions (RAID) Log
- Requirements Traceability Matrix (RTM) – track agreed upon requirements through each phase
- Appropriate escalation

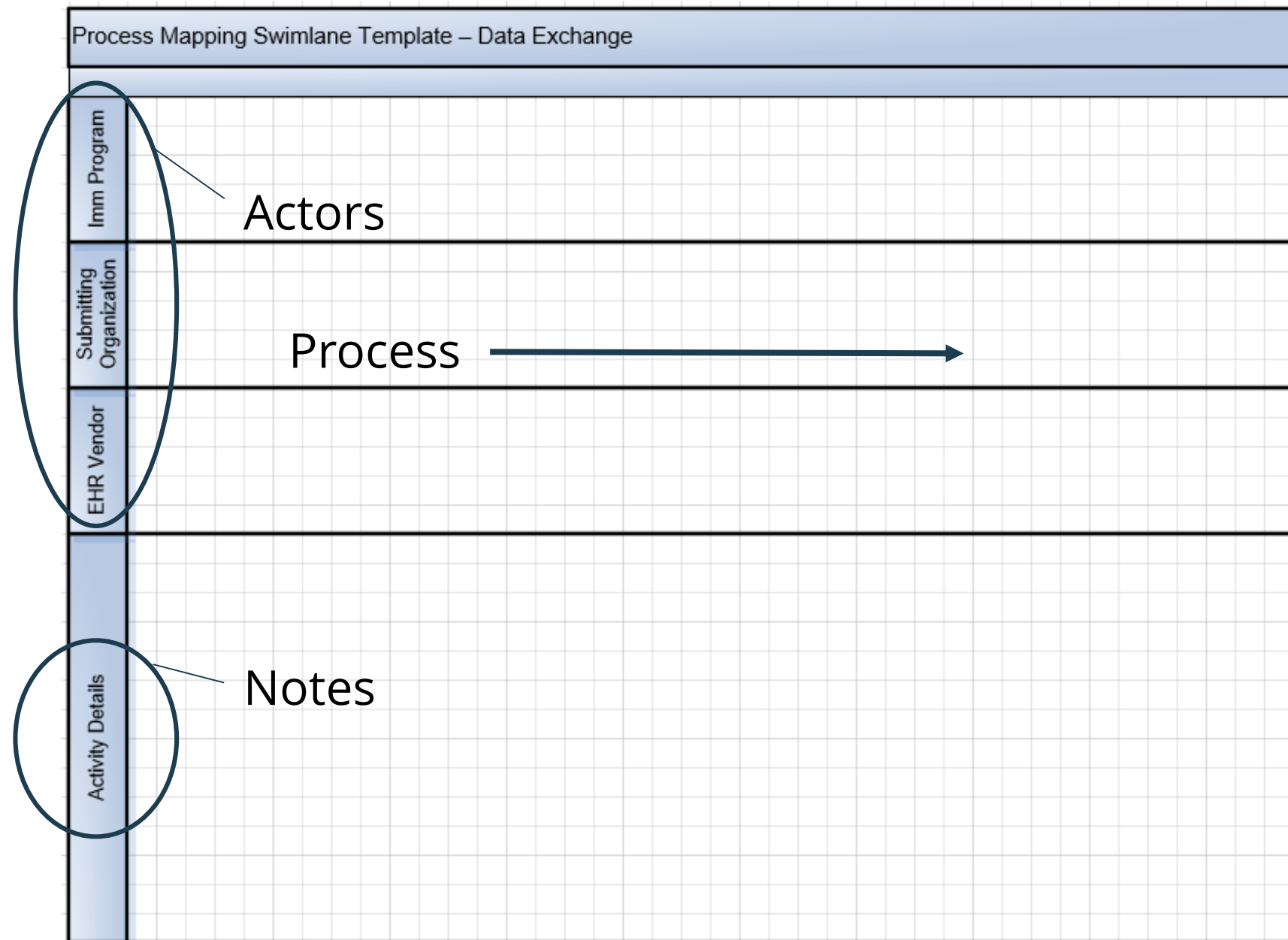


# Activities That Impact Multiple Teams

- Routine Subject Matter Expert (SME) group touch points....
  - data migration
  - Interface
  - Training/Communications
  - Integration Planning
- User Acceptance Testing (UAT)
  - Define State UAT team/confirm schedule/bandwidth
  - Prepare Test Cases
  - Develop Test Data/Process
  - Conduct UAT

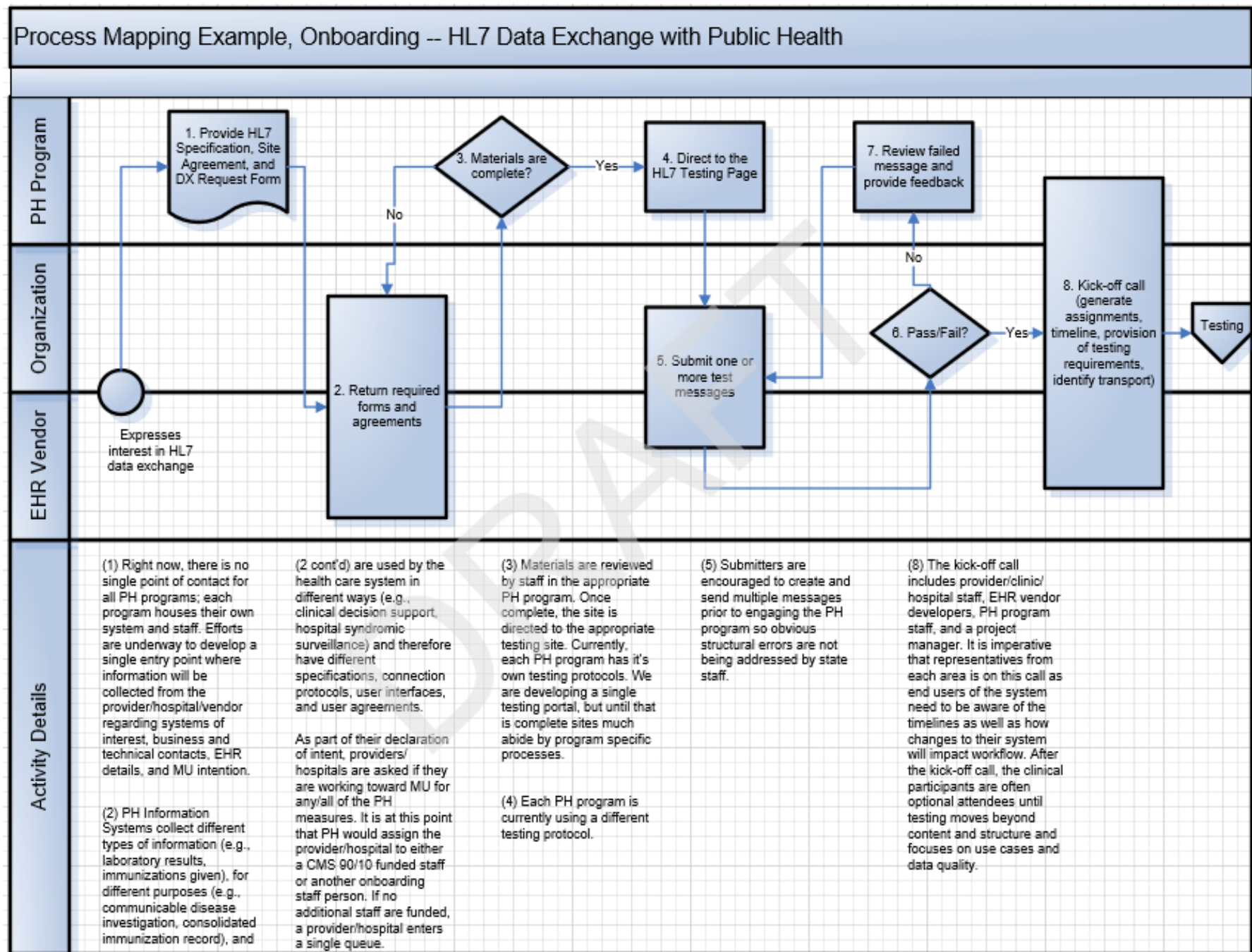


# Process Mapping Swimlane Template





# Process Mapping Example (onboarding Initiation)



# Phase 5 - Close

All



# Project Closeout Artifacts



## **Role of the Project Lead**

- Review/approve artifacts
- Ensure success metrics achieved
- Establish mechanism for user feedback
- Communication plan - post implementation



# Project Closeout Artifacts



## **Role of the Contracted PM**

- Draft SLAs
- Determine disposition of hardware (if needed)
- Identify end date of existing contracts



# Project Closeout Artifacts



## **Role of the IIS Vendor PM:**

- Remediate critical defects
- Obtain approval to launch
- Establish warranty period
- Transition of code to ongoing support/maintenance mode



Questions, Comments, Discussion?



Thanks so much!

A survey link with a brief evaluation  
will be emailed to all attendees  
following this webinar

