Lean and Mean(ingful) Project Documentation

Stripping down project documents to the essential elements

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Project Management Complexity Continuum

- Meta Data
- Statistics
- Analysis
- Dashboards

- Get ‘er done
- Exception reporting
- Get to the next one
- Don’t bother me

- It’s all about getting it done
- Charter and Plan are agreements
- Measurable Objectives
- Minimal Documentation

What is Lean and Mean(ingful)?

What are We Doing?

#1 *Facilitation of Work*

Compliance

Reporting Requirements

Project Management Drivers

Documentation and Tracking

Process Adherence and Improvement

Getting Work Done

- Push Information
- Information must get inside the head
- Storage Doesn’t help

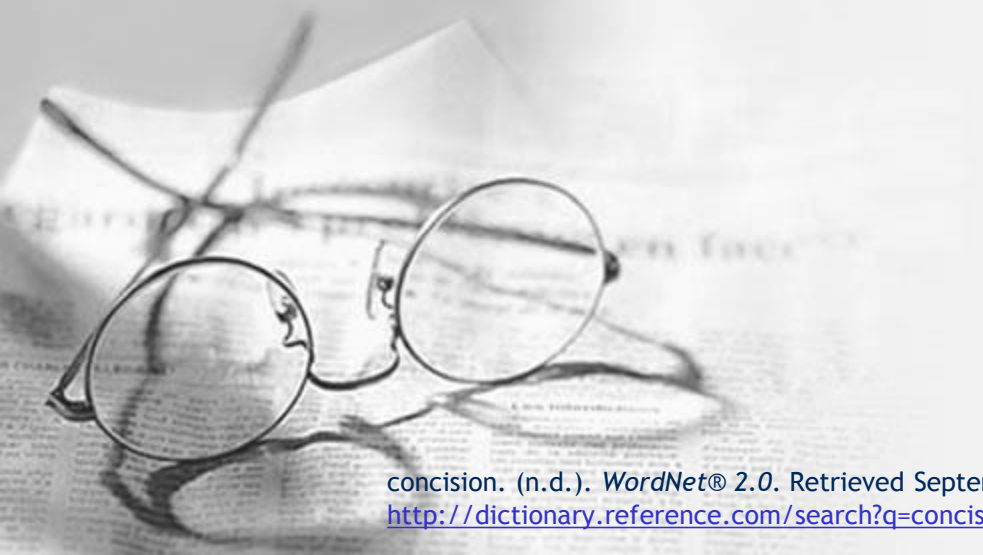
Documents don’t make decisions

Writing in General *Newspaper Style*

- People’s time is the most important commodity they possess
- Make access to information easy

People are in a Hurry

Terseness and economy in writing and speaking achieved by expressing a great deal in just a few words.



Concision

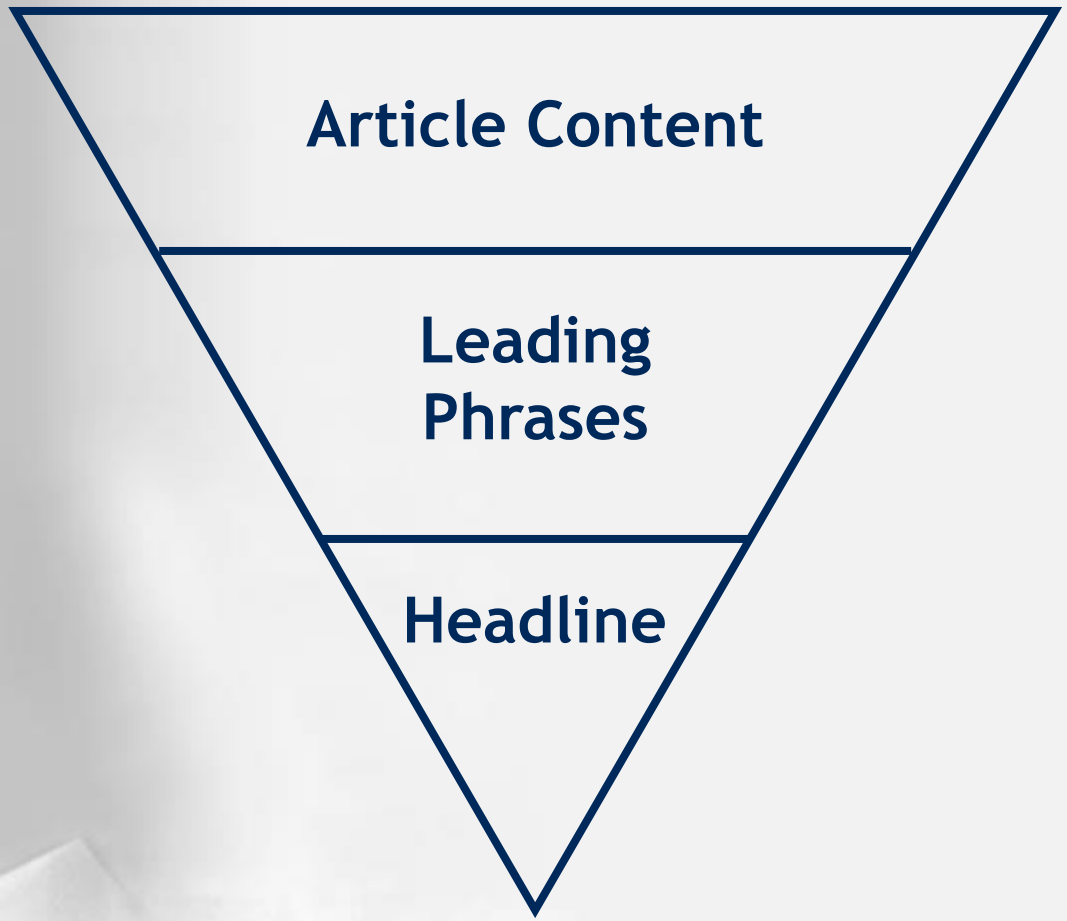
concision. (n.d.). *WordNet® 2.0*. Retrieved September 18, 2006, from Dictionary.com website: http://dictionary.reference.com/search?q=concision

- Logical
- Background of Issue
- Current Situation
- Contributing Factors
- Recommended Solution

Formal Documentation

- Headlines
- Leading Phrases
- Article Content

Newspaper Style



Inverted Pyramid of Detail

- Executive Summaries were invented for the same reason
  - Overview of entire situation
  - Recommended Solution
  - One Page Maximum
  - Details come later in full document

Executive Summaries

1. Charter/Plan – Acts as an agreement
2. Status Reports – Formal Communication
3. Closure Report – Information for the future

3-4 Documents

Lean and Mean(ingful)
Charter / Plan

1. Executive Summary / Charter
2. Goals and Objectives
3. Deliverables & Acceptance Criteria
4. Planning Documentation

Lean and Mean(ingful) Charter/Plan Process

1.0 [Project Name] Executive Summary / Charter (1 page max)

Project Sponsor: [Sponsor Name] **Business Unit: [Department Name]**
Your Data: [Data]

1.1 PROJECT OVERVIEW

[Replace this text with the rationale and business justification for undertaking this project. What are the basic goals, objectives, and success criteria?]

Project goals

[Example: Improve ease of communication between clinics and patients.]

Scope

[Example: This project will run from [date] to [date].
This project will require [#] of Operations personnel.]

Write this last.

Assumptions

[Example: This project does not include training.]

Risks

[Example: Failure to complete this project could result in being out of compliance.]

Costs

[Example: 4 servers will be purchases at a total cost of $XX,XXX]

Timeline

[Example: Requirements will be gathered from [date] to [date].
Example: Design phase will be conducted between [date] and [date].

- Goals can be subjective and indefinable
- Objectives must be measurable
- Connect the subjective to the objective so that success is clearly defined

1. Executive Summary / Plan
2. **Goals and Objectives**
3. Deliverables & Acceptance Criteria
4. Planning Documentation

Define Success

2.0 PROJECT SCOPE

2.1 Goals and Objectives

Goals	Objectives
[High level business goal]	[Specific achievement that supports goal]
	[Specific achievement that supports goal]
[High level business goal]	[Specific achievement that supports goal]
	[Specific achievement that supports goal]

2.0 PROJECT SCOPE

2.1 Goals and Objectives

Goals	Objectives
Increase Usage	
Enable end user to configure interface	
Deploy software.	

2.0 PROJECT SCOPE

2.1 Goals and Objectives

Goals	Objectives
Increase Usage	Increase users from 50 to 200 in the first quarter of 2009.
Enable end user to configure interface	Conduct 1 hour end user training during 3rd phase of project.
Deploy software.	Install software on desktop computers for 100% of local users.
	Install software on laptops computers of 65% of local users.
	Publicize web site with download links and instructions for off site users and traveling employees.

- Milestone – What Phase?
- Deliverable – What Am I Giving?
- Acceptance Criteria – How do I know it is good enough?

1. Executive Summary / Plan
2. Goals and Objectives
3. **Deliverables & Acceptance Criteria**
4. Planning Documentation

Define what the customer is getting

2.2 High Level Timeline & Deliverables

Any Deliverables listed in the Objectives section must be listed here along with the acceptance criteria for that deliverable.

Milestone	Deliverable	Acceptance Criteria
[When?]	[What?]	[How do we know it's good enough?]
	[What?]	[How do we know it's good enough?]
	[What?]	[How do we know it's good enough?]
[When?]	[[What?]	[How do we know it's good enough?]
	[What?]	[How do we know it's good enough?]
	[What?]	[How do we know it's good enough?]

2.2 High Level Timeline & Deliverables

Any Deliverables listed in the Objectives section must be listed here along with the acceptance criteria for that deliverable.

Milestone	Deliverable	Acceptance Criteria
Development	Design Document	Approved by engineering and security team leads.
	Floor Plans	Floor Plans contain sufficient information for operations to enter required data in configuration database.
Deployment	Training Class	Students demonstrate ability to configure interface with no assistance during class.
	Server Installation	System powers up, obtains IP address and passes 10 point test.
Testing	Test Script	Test Script has all required tests marked as successfully completed, and signed by tester.

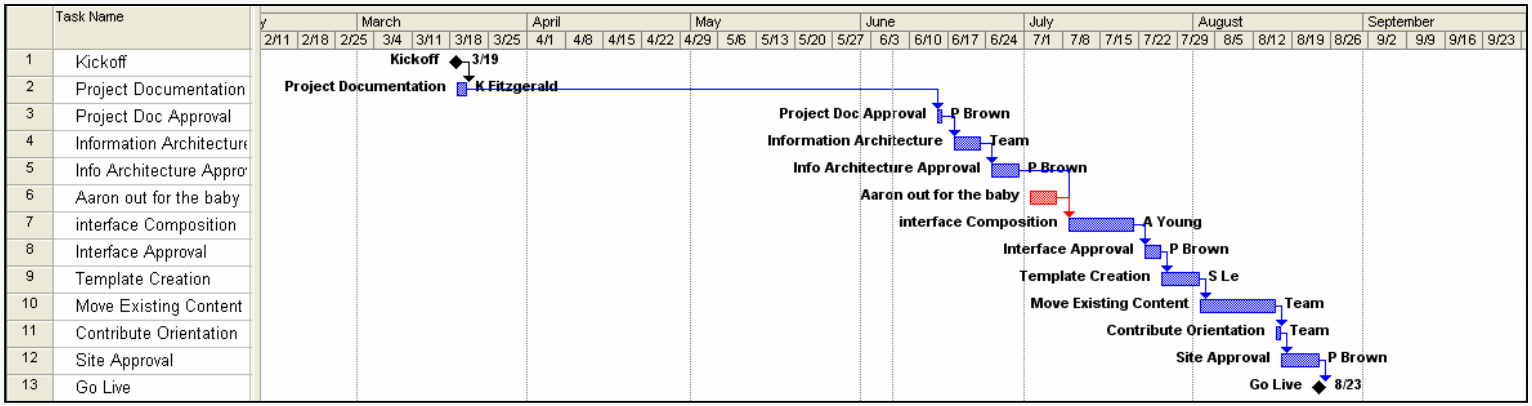
- Schedule
- Out of scope, Assumptions, Constraints
- Risk, Teams, Communication Plan

1. Executive Summary / Plan
2. Goals and Objectives
3. Deliverables & Acceptance Criteria
4. **Planning Documentation**

Define what the customer is getting

2.3 Project Schedule

[Replace this text with a table containing tasks and dates, or a screen capture of the Gant chart from the MS-Project file. You may need to rotate the screen capture 90 degrees to make it readable.]



2.4 Deliverables Out of Scope, Assumptions & Constraints

[Replace this with a description of areas not considered part of this project. Examples are data, processes, applications, or business management.]

[Example: Deliverables for this project include designing a database for the application but do not include installing the application.
Example: This project does include training development.]

2.5 Other

Impacts to organization?
Fulfillment of corporate compliance?

3.0 PLANNING DOCUMENTATION

3.1 Risk

Issue Name	Owner	Description	Mitigation
[Issue Title]	[Name]	[Description of the issue]	[Plan]

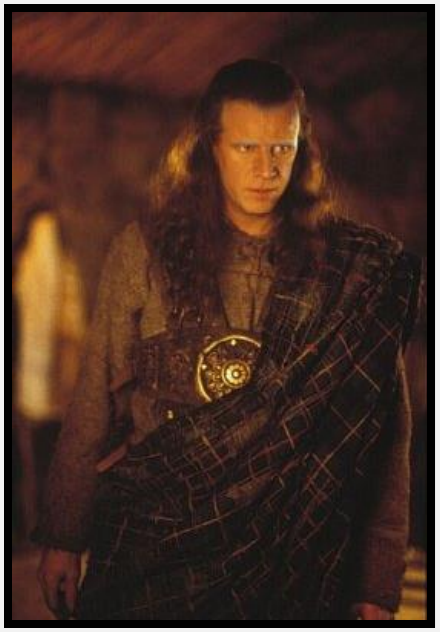
3.2 Team Members, Roles, Organizations

Project Team Role	Project Team Members	Responsibilities
[Role Title]	[Name]	[Replace this text with a description of the Role Responsibilities.]

3.3 Communication Plan

List team members, sponsors and stakeholders who will receive status reports.
Define any other special reporting structures that exist.

- **Executive Summary / Charter**
- 1 Page – 1 Page – 1 Page – 1 Page
- Did I mention one page?
- Only the most important content that fits on one page.



(If you have more than one page of important information, cut the least important information until you have one page.)

There can be only one.

1.0 [Project Name] Executive Summary / Charter (1 page max)

Project Sponsor: [Sponsor Name] **Business Unit: [Department Name]**
Your Data: [Data]

1.1 PROJECT OVERVIEW

[Replace this text with a description of the project, the justification for undertaking this project, and the goals, objectives, and success criteria.]

Project Goals

Scope

Assumptions

Risks

Costs

Timeline

???

1. Executive Summary / Charter
2. Goals and Objectives
3. Deliverables & Acceptance Criteria
4. Planning Documentation

Charter Conclusion

Lean and Mean(ingful) *Status Reports*

RE: Status Reports - week ending April 4th
Kevin, Fitzgerald
To: ProjectStakeholder@email.com
Attachments: StatusReport.doc

Project Name: Customer Service Portal
Synopsis: Applications Team successfully tests production servers.
Status: Green
Accomplished This Week: The App team has tested the connectivity between the public gateway and the application servers and has corrected all problems. The project will go live as scheduled.

- 25 load testing scenarios were run Monday.
- 23 of the tests ran to completion with no errors.
- One test did not complete because of an error in the test's scripting. The error was corrected and the test ran successfully.
- Another test failed because of a blocked port between the application server and a third party reporting server. The firewall access control list has been edited to open this port and the test was run a second time with no problems.

Planned for next week: Customer validation begins Monday.
Changes: None
Submitted by: Kevin Fitzgerald

RE: Status Reports - week ending April 4th
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Headline

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Leading Phrases

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Specific Details

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Who?

What?

When?

Where?

Why?

The 5 Ws

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Why?

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- Newspaper style of writing
- Inverted pyramid
- Concision
- 5 Ws

Status Report
Conclusion

Lean and Mean(ingful)
Closure

- **Lessons Learned**
- **Project Retrospective**
- **Post Mortem**
- Document
  - Performance of the project
  - What went right, and how to do it again
  - What went wrong, and how to prevent it in the future

Closing Meeting

1.0 Executive Overview [one page maximum]

1.1 Project Description

Project Sponsor: [Sponsor Name] **Business Unit: [Department Name]**
Your Data: [Data]

Overview

What were the original goals, objectives, and success criteria? Refer to project overview statement and/or project charter for this information.

1.2 Project Closure Summary

[Replace this text with a brief description of why the project is being closed.]
Is it being closed because all project objectives and deliverables have been met, or is it being closed for other reasons (loss of funding, shift in strategy, etc.)?

1.3 Project Closure Recommendations

[Replace this text with a list of recommendations arising from review of closure tasks.]
The main recommendation are usually to gain project closure approval from the Project Sponsor, including agreement that the project has fulfilled all of the requirements as documented and the Project Sponsor is satisfied that all outstanding items have been satisfactorily addressed.

1.4 Post Project or Outstanding Tasks

[Replace this text with a list of outstanding issues for this project. *If this list causes the executive summary to exceed one page, summarize the outstanding tasks here and put a detailed list in section 2.3 Outstanding Tasks and Issues. Refer to the detailed list in the summary that goes here.]*
What actions are not yet completed? Who is responsible for them? Which success criteria are not yet met? Which deliverables are not yet achieved? Which training requirements are still outstanding?

2.0 Project Performance

2.1 Goals and Objectives

[Replace this text with a comparison of actual project performance to project objectives.]

2.2 Outstanding Tasks and Issues

[*Delete this section if it has been thoroughly covered in section 1.4. Otherwise, replace this text with a detailed list of any tasks or issues still outstanding at the end of the project.*]

Will each task or issue be resolved? What actions are not yet completed? Which success criteria are not yet met? Which deliverables are not yet achieved? Which training requirements are still outstanding? To whom are these tasks and issues assigned? Who will continue to report on each issue's progress?

2.3 Project Performance

Milestone and Deliverables Performance

[Replace this text with an outline of actual performance of project milestones and corresponding deliverables.]

Were all deliverables achieved on time with high quality and customer acceptance? If not, what were the reasons? Is achievement anticipated at a later date?

2.0 Project Performance

2.1 Goals and Objectives

Goals	Objectives
✓ Increase Usage	✓ Increase users from 50 to 200 in the first quarter of 2009.
✓ Enable end user to ✓ configure interface	✓ Conduct 1 hour end user training during 3rd phase of project.
✓ Deploy software.	✓ Install software on desktop computers for 100% of local users.

2.2 Outstanding Tasks and Issues

The opt-out function for notification system has not been enabled. Resources have not been available to implement a process. A work order has been created and David Fairborn has committed to complete this task by June 11th.

2.3 Project Performance

Issue	Week 1	Week 2	Week 3	Decline Phase 1	Decline Phase 2	Total Decline
1. User assumes event requires action.	30	12	2	60.00%	33.33%	**93.33%**
2. User cannot find the event message.	5	5	1	0.00%	80.00%	**80.00%**
3. User accidentally deletes notification.	45	2	1.25	95.56%	1.67%	**97.22%**

3.0 Lessons Learned & Best Practices

3.1 Lessons Learned

[Replace this text with a list of successes and shortcomings to remember for the future.
Which activities and processes worked well?
Which could have been improved, and how?]

3.2 Best Practices

[List practices that were developed that should be applied to similar projects.]

3.0 Lessons Learned & Best Practices

Issue: Project requirements not well defined after vendor refused to support Linux.
Design requirements seemed to change daily.
Potential Solutions: Acknowledge that a project build phase has been canceled and that a research/design phase has been re-started.

Issue: Work room did not have enough network drops.
Potential Solutions: A switch should be put in each work room so that there are plenty of network connections.

Issue: Snacks were not provided as in past projects.
Potential Solutions: Project Managers should provide more snacks.

Issue: Individual team members did not want to sign up for the large number of forums and online tech resources needed to find information for project. (This would attract spam.)
Potential Solutions: A team email account and profile was created with a free email service. Team members then used that account to register for online resources.

Issue: It was difficult to get people together for team work because of meetings and interruptions.
Potential Solutions: Exchange was used to schedule a large number of team work meetings over the course of the project so that team member's schedules were blocked off and they knew exactly when they would be getting together to work.

- It’s all about getting it done
- Documents are agreements
- Measurable Objectives
- Minimal Documentation
  1. Charter – Acts as an agreement
  2. Status Reports – Formal Communication
  3. Closure Report – Info for the future

Lean and Mean(ingful) Conclusion

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Questions?