

Welcome to F.I.R.E. 2008



Get It Right The First Time

Better Reporting Through Project
Management Methodology

The Rules

- Set all cell phones and pagers to explode
- Smoking is allowed ...inhaling not exhaling
- Interrupting the speaker is not only allowed, it is highly encouraged
- Any mistakes in this presentation are the direct result of budget cuts
- This session is rated CG - Children's Guidance suggested, some material may not be suitable for adults over the age of 13

Introduction

- In this session I will share with you ideas on how to better satisfy your reporting & BI requirements by using Project Management methodology. By sitting through this session you should realize the following benefits
 - Understand that good report planning is as important as good developing
 - See how project management methods can improve the return on investment of your time and effort
 - Learn more about the hidden and mysterious world of users
 - Pick up some cool *cocktail party jargon*

Get It Right The First Time

- How many times has something like this happened to you...
 - You: “Hello. Focus Reporting Central”
 - User: “I need a report that shows the number of ABNE students who were eligible for PELL or FSEO awards but were not work-study participants. Oh, and summarize it by term for the past year. I need this by Friday.”
 - You: “Uh, ... O.K.”



Get It Right The First Time

- CBH Method (Cart Before Horse)
 - Start writing the Focus exec immediately
 - Get sidetracked by a coding issue
 - Read about a really cool technique and spend hours trying to work it into the report
 - Get a phone call asking how the report is coming
 - Go back to original approach and rush to completion
 - No time for testing, so you deploy the report to the production server

Get It Right The First Time

- How not to proceed – Part 2 ...
 - Call the user and say, “It’s finished”
 - Receive phone call back from user, “This isn’t what I asked for. I’ll come over and try to explain”
 - You hide in the bathroom, but user finds you
 - User begins talking about admitted but not enrolled something and Federal grant rules and blah, blah, blah
 - You ask how he liked the font color

Get It Right The First Time

- Might there be a better way?
- “Good artists copy, great artists steal.”
Picasso
- Using a proven standardized process has been shown to improve chances of IT project success up to 100%
- So, how can we apply project methodology to improve report and BI development?

Get It Right The First Time

- All successful technical developments have certain characteristics in common:
 - Well understood and documented requirements
 - Evaluation of alternative solutions that results in the selection of the best one
 - Development of that solution with the highest return on investment
 - Testing the solution to verify functionality
 - Certifying the solution satisfies all requirements

Get It Right The First Time

■ Report development phases:

1. Request for information
2. Analysis to determine data and coding requirements
3. Development and testing
4. Verifying the report is what the user wanted
5. Put report into production

■ Project Management Phases

1. Initiation
2. Planning
3. Execution and Control
4. Closeout
5. Operation and Support

Get It Right The First Time

■ Report Project Management Methodology

■ 1. Report Initiation Phase

- A business need for information creates the need for a technical reporting solution
- Requirements analysis is step one
 - Report content – What is REALLY needed?
 - Data – Can you satisfy the need with the data you have?
 - Processing - What must be done to the data to produce the required information?
 - Distribution – Who, how, how many?
 - Security - Who can access the information?

Get It Right The First Time

- Put all those requirements together and you have the *scope* of the reporting project
- Priority should be established based on the importance of the report to the organization - *project governance*
- Assign responsibility to a person to lead the effort *project manager*
- The requestor becomes the *project sponsor*

Get It Right The First Time

- 2. Report Planning Phase
 - Identify tasks required to develop the report – *Work Breakdown Structure*
 - Assign those tasks to person responsible for their completion – *Resource Breakdown Structure*
 - Decide when the tasks must be done so the report will be completed when due - *Schedule*
 - Decide how to communicate progress, when, and to whom – *Communications Plan*

Get It Right The First Time

- 3. Report Execution and Control Phase
 - Develop the required Focus and data constructs
 - Test the report against the original requirements to insure accuracy
- 4. Report Closeout Phase
 - Acceptance of the report by requestor
- 5. Report Operation and Support Phase
 - Put report under production control

Get It Right The First Time

- “Philosophy is fine, but you can’t build a house with it.” Plato
- What are the key practical applications of PM methodology in reporting?
 1. Understanding the business information need is critical
 2. Evaluating if you have the data to satisfy the information need and what processing must be done to it is key to accurately estimating scope and schedule
 3. Verifying that each data element used in the report accurately represents the right business condition
 4. Testing to verify the solution meets all the requirements

Get It Right The First Time

- Document the report requirements
 - Not in your language, in theirs
 - Be specific, explain every term & calculation as YOU understand it
 - Ask, nay, demand verification before doing anything
- Communicate
 - Update the requestor on your progress
 - Notify *stakeholders* of any issues as soon as they arise
 - Remember, transmission is not communication

Get It Right The First Time

■ Testing

- Consider *rapid prototyping* to incrementally test report functionality
- Insure the results of the report are confirmed by another source

■ Signoff

- Obtain verification from the requestor that the report satisfies all requirements

Get It Right The First Time

- Top Three Reasons Projects Fail

3. Ineffective stakeholder management

2. Ineffective issue management

1. Lack of estimating and scheduling

Get It Right The First Time

- Strategies to insure your report project is a success
 1. Spend the time to develop the most accurate estimates and schedule you can
 2. When an issue arises, notify all stakeholders immediately, analyze alternative solutions, make a recommendation
 3. Users are people who think this is how a computer works...
http://www.berro.com/joke/how_computer_works.htm

Get It Right The First Time

■ Understanding users

- “Two peoples separated by a common language”
– W. Churchill
- *Agile Development* requires face-to-face collaboration between developers and users
- Everyone loves to tell you what they do, so for any request you are not 100% sure of, try saying
“Help me understand what you mean by that”

Top 10 Things Heard on a Failing Project

- **10. “Project Plan? This project is too simple to spend time creating a project plan!”**
- Surprisingly, many believe a small project does not need a project plan to manage the workload. But the truth is, even the smallest efforts need some kind of plan so that everyone involved knows what is expected and when.

Top 10 Things Heard on a Failing Project

- 9. “Since I didn’t hear otherwise, I *assumed* all was going well.”
- The PM reports that all is well because he did not hear bad news. Truth is that no one likes to report bad news. The successful project manager must proactively seek status to ensure all aspects of the project are progressing as planned.

Top 10 Things Heard on a Failing Project

- **8. “We’ll do all the documentation later.”**
- Bottom line is that without the proper documentation, the project is doomed, certainly in the long term, and often the short term as well. The trick is to determine the proper level of required documentation, and ensure the time is spent wisely in preparing it.

Top 10 Things Heard on a Failing Project

- **7. “The customer needs the project completed earlier. Take some time out of testing.”**
- When the schedule needs to be shortened, the first tendency is to cut components at the end of the project, often resulting in reduced testing, shortcuts, or compressed time for error correction.

Top 10 Things Heard on a Failing Project

- **6. “Development is taking longer than expected. Take some more time out of testing!”**
- If development is taking longer than expected, either you are not managing scope, or the development is more complex than planned.

Top 10 Things Heard on a Failing Project

- **5. “This one small change shouldn’t affect anything.”**
- That may be true, but are you willing to bet the project’s success on it? More often than not, changes have some kind of ripple effect, including documentation, testing, and training.

Top 10 Things Heard on a Failing Project

- **4. “The team is reporting their tasks as 95 percent complete, so we must be almost done.”**
- A Japanese proverb states, “When you are 95 percent complete, you are halfway there.”

Top 10 Things Heard on a Failing Project

- **3. “I communicate on a ‘need to know’ basis”**
- Communication is the most critical job of a project manager, and you need to be careful if you are restricting information.

Top 10 Things Heard on a Failing Project

- **2. “No tasks are late, so the project must be in good shape.”**
- I call this “the head in the sand” approach to project management. If action is only taken after tasks are late, then the project manager is in reaction mode, not planning mode.

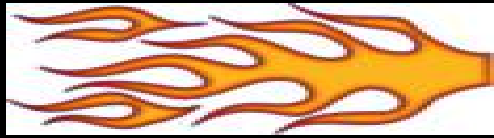
Top 10 Things Heard on a Failing Project

- And the number one quote heard on a failing project (drum roll, please)...
- **1. “There is nothing I can do; I’m just the project manager!”**
- A definition of a project manager is “the single person accountable for the success of the project.” Need I say more?

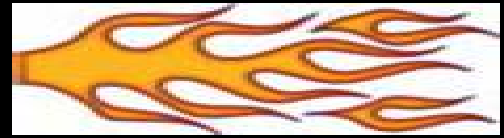
Get It Right The First Time

- So, why do this project thing?
 - Do it right and you only have to do it once
 - Accurate estimations and schedules will establish your reputation for truth in advertising
 - Inspire confidence in your abilities and get yourself promoted
 - Project planning can be used in all aspects of life, practice it and it will improve yours





Q & A



Thank You For Attending!!!

James C. Thomas

jcthomas@vcu.edu

804-828-9954

