

# Team Charter

July 2006



Project Delivery Process



## On time, on budget, on target . . .

*To provide and deliver proficient, consistent, effective, and repeatable project management expertise and services to our Business units, and external business partners*

### Role:

- Project manager
- Relationship owner between IT departments
- Guardian of project process, reporting, and methodology
- Business and technology advocate

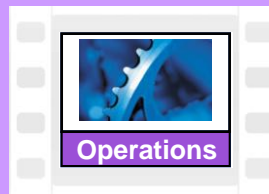
### Key Metrics:

- **Project status/health:** On-time, on-budget, on-spec
- **Portfolio & Project reporting:** In queue, active, completed
- Project methodology adherence



## Business Clients

- Initiate projects
- Provide business leadership
- Establish business metrics



## Project Management Team

- Project manager
- Relationship owner between IT departments
- Guardian of project process, reporting, and methodology
- Business and technology advocate



## Information Technology

- Initiate projects
- Establish success criteria
- Provide infrastructure
- Provide subject matter expertise

Serving our Business Partners



## Infrastructure Project Management

- Conducting project discovery and conceptualization
- Performing project management
- Managing project resources (staff and budget)
- Owning relationship between business clients, and IT
- Refining and enforcing best practices and work efficiencies as established by the XYZ Corp. governance bodies
- Translating business/technology vision into an actionable and achievable project approach (including staffing models and readiness analysis)
- Delivering a holistic, cohesive project vision and reporting system

RESPONSIBILITIES

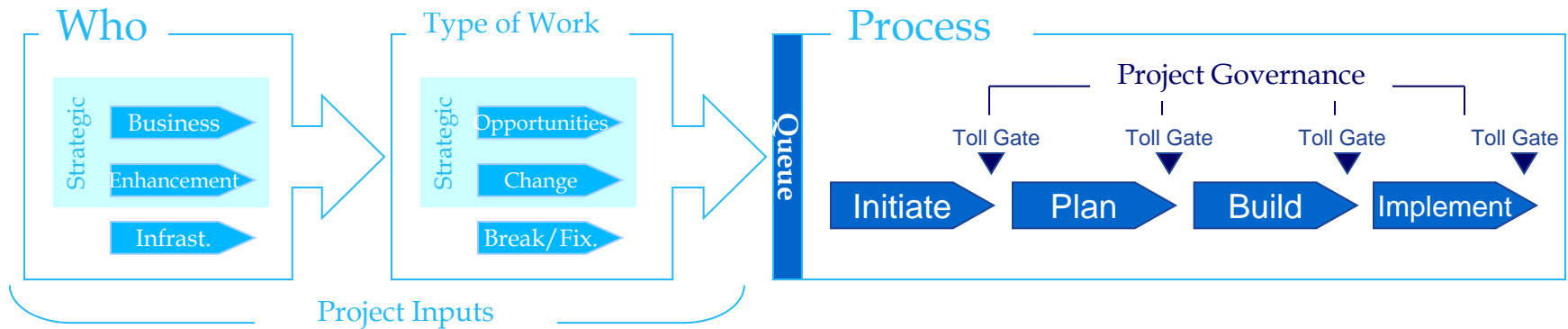


## Goal

*Create one ubiquitous process that allows for variable levels of due diligence*

## Challenge

Project work comes in from different areas and is variable in size, cost, and general scope



**Q:** *How do we align all these variables into one ubiquitous process?*

**A:** *We clearly define and categorize project work*

- 1 *What is a project?*
- 2 *What type of project is it?*
- 3 *What is the size and scope of the project?*

## Project Definition

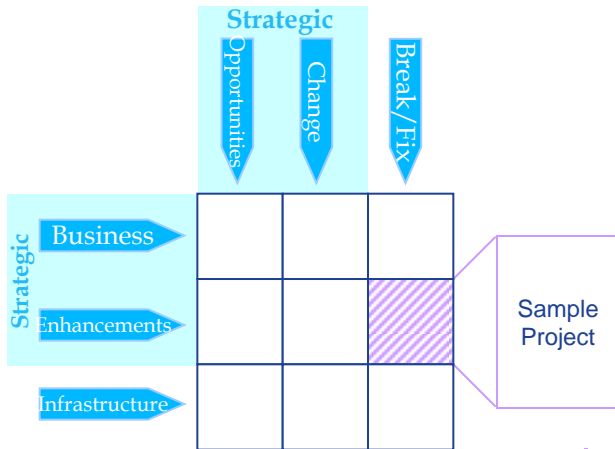
### 1 What is a project? (Meets any of the below)

Project

- 1 Work requires inter-departmental coordination
- 2 Level of effort exceeds 8 business hours
- 3 Cost exceeds \$XXX
- 4 Solution requires a variance in established technology standards or process
- 5 Executive discretion

*Work not meeting any of the above will be considered, and managed, as an Intra-departmental opportunity, change, or break-fix initiative*

### 2 What type of project is it?



### 3 How big is the project

- Business as usual
- Intra-departmental Project
  - Management team initiative
- Inter departmental initiative
- Enterprise solution
- Etc.

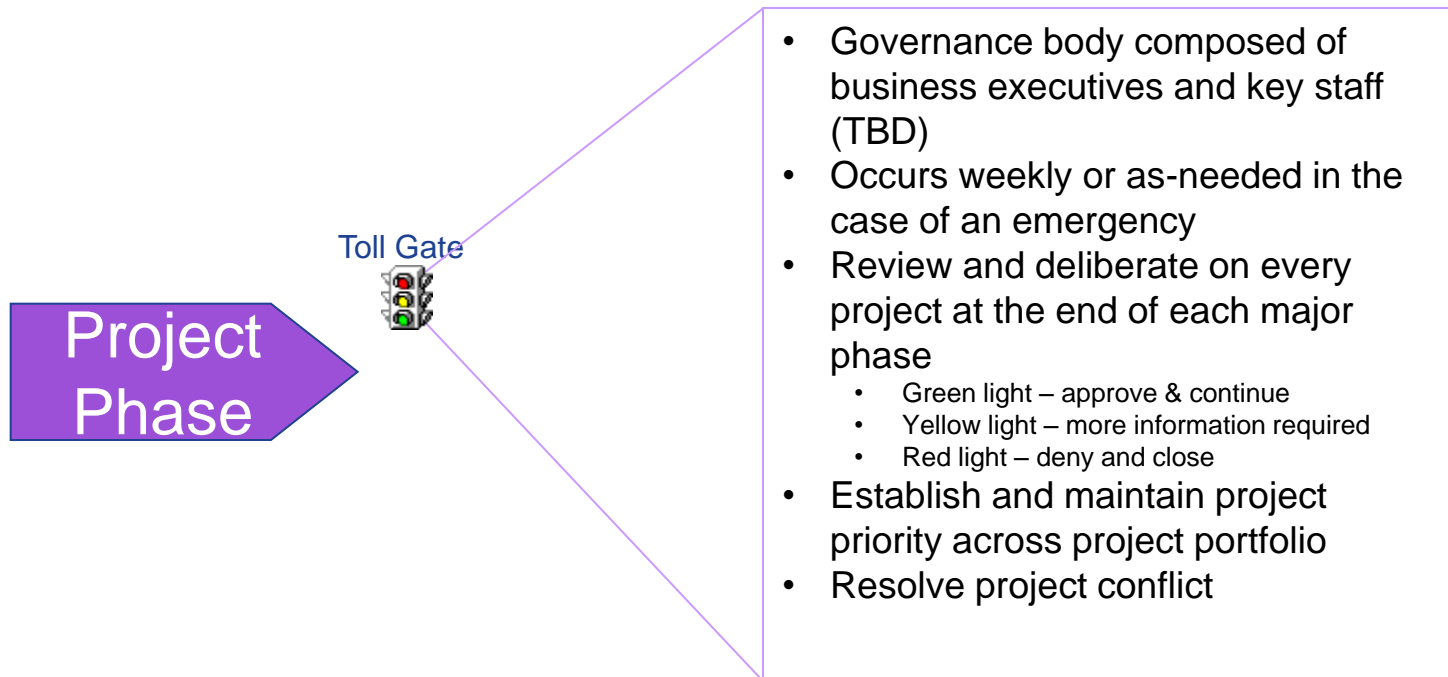
Yield  
Categorical reporting and trending data



## Tollgate Process

### OBJECTIVES:

- 1 To ensure early and frequent communication between executive stakeholders
- 2 To ensure project review and participation across all departments and executive stakeholders
- 3 To ensure project efficiency (staffing, budget, and technology)
- 4 To ensure that all projects align with the DTV business/strategic plan



## Delivery Process

Putting it all together . . .

Toll Gate



Toll Gate



Toll Gate



Toll Gate



### Initiate

- Submit High-level requirements
- Accept & prioritize
- Enter into project tracking system
- Assign PM
- Establish project repository & binder
- Detailed requirements
- Project Brief/Scope
- Roles & respons.
- Comm. Plan
- Work plan
- Rough Order of Magnitude (ROM)

### Design

- Baseline milestones
- Seed funding
- Functional requirements
- Technical requirements
- Make vs. buy analysis
- Functional design
- Technical design
- Test plan
- Baseline budget
- ROI
- Process change/Impact analysis

### Build

- Funding
- Procurement
- Create test cases
- Code/build
- Create content
- Legal approval
- Baselineing
- Test
- QA
- User acceptance testing
- Tuning/optimizing
- QA Cert.
- Infrastructure Cert.

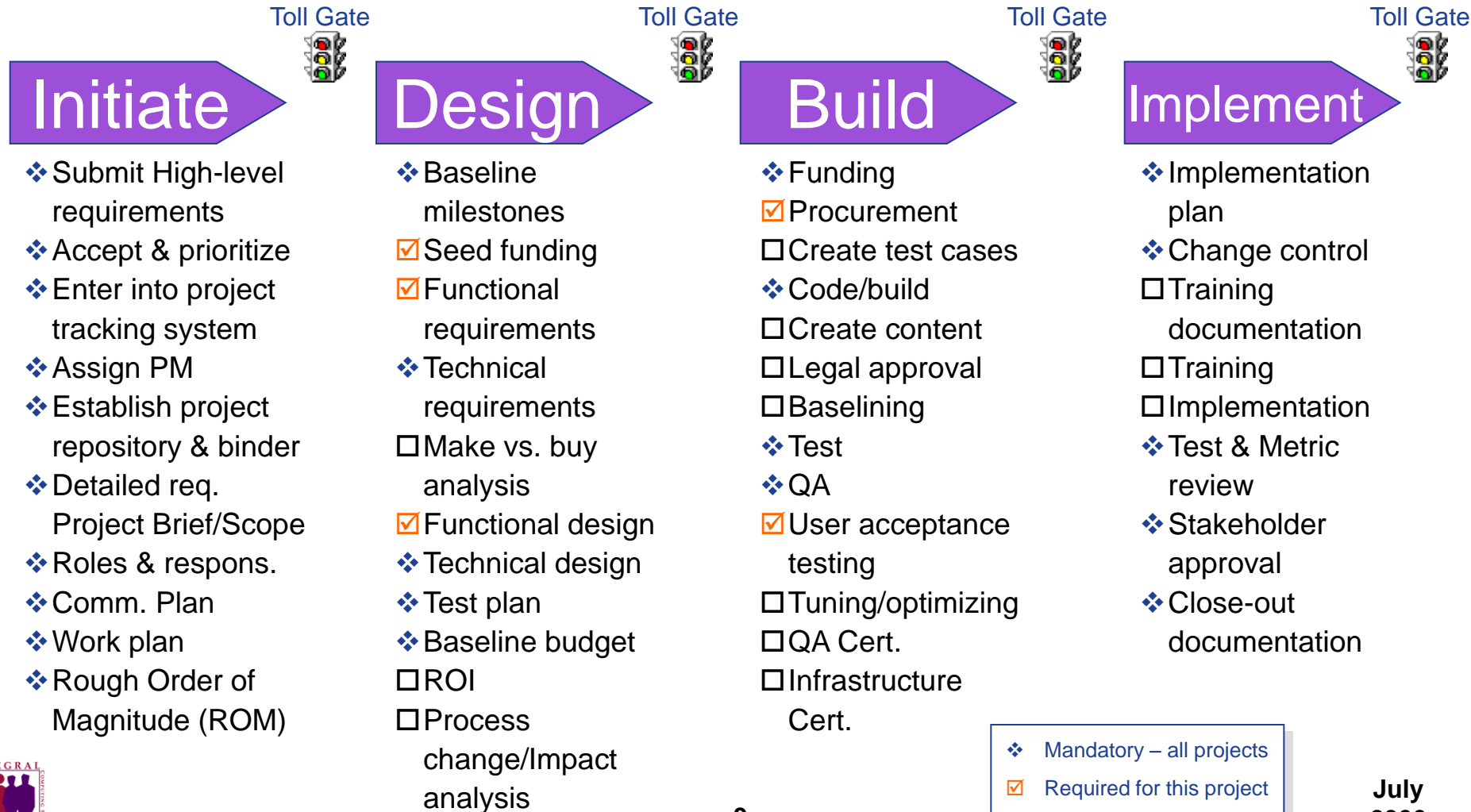
### Implement

- Implementation plan
- Change control
- Training documentation
- Training
- Implementation
- Test & Metric review
- Stakeholder approval
- Close-out documentation



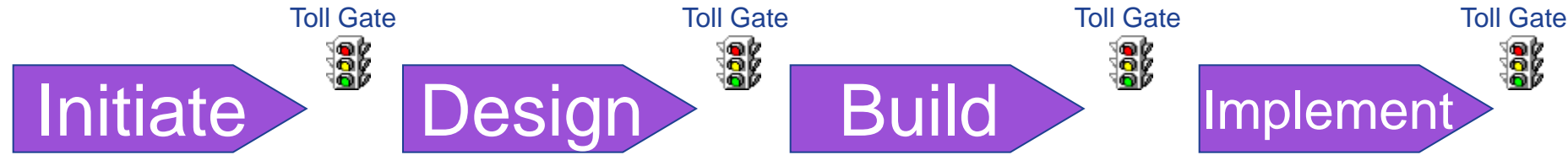
### Variable Diligence Levels

Once the project is defined and categorized, the Producer defines the appropriate level of project diligence



## Repeatable Streamlined Process

Leverage document template library to expedite the process



**High-level requirements**

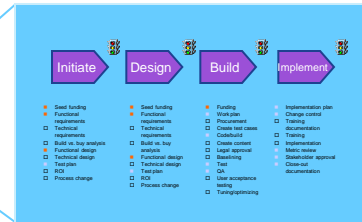
- Accept & prioritize
- Enter into project tracking system
- Assign PM
- Establish project repository & binder
- Detailed req.

- Business objectives
- Metrics
- Timing
- Benefits summary
- etc.

**Project Brief/Scope**

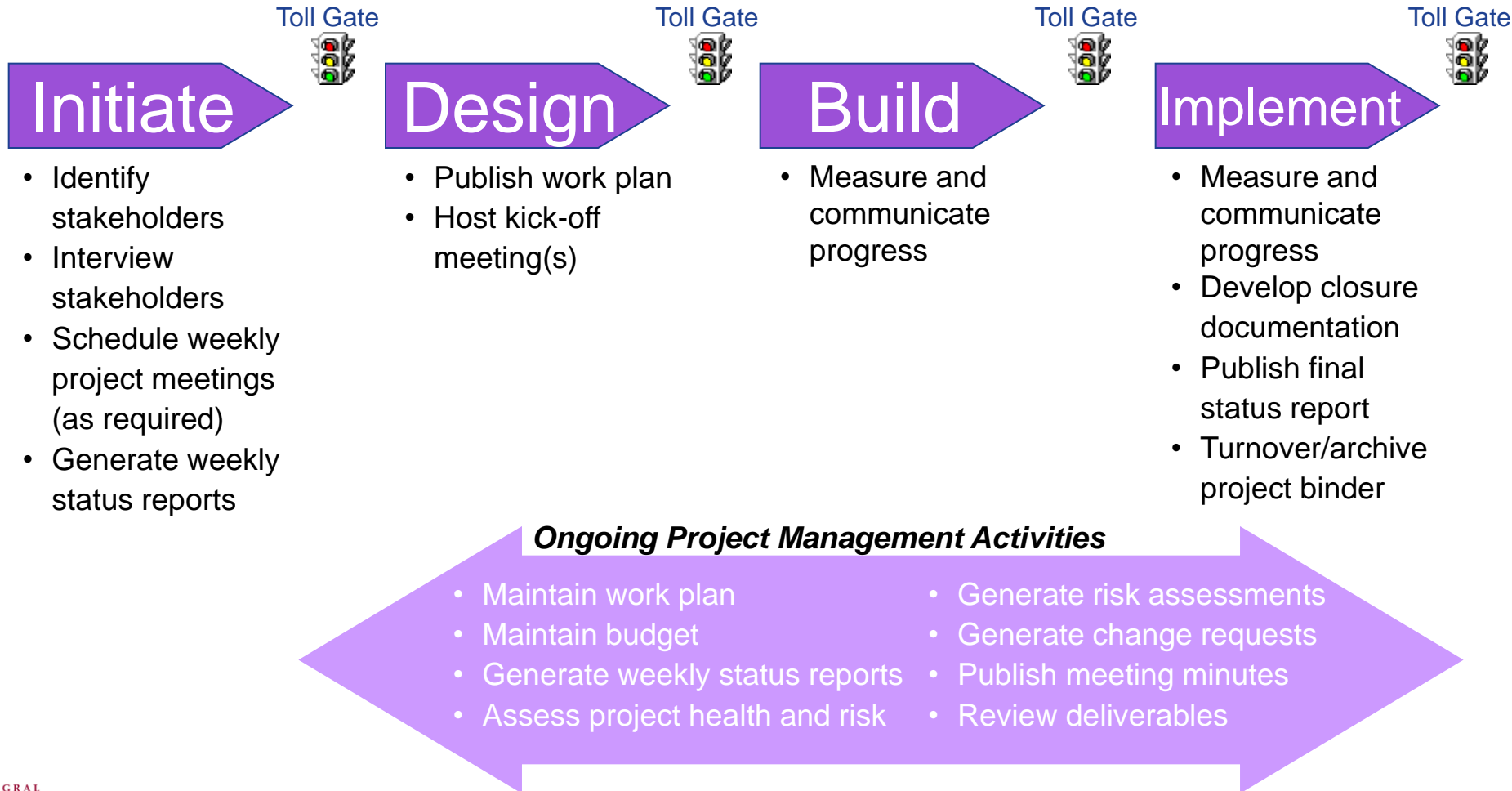
- Roles & respons.
- Comm. Plan
- Work plan
- Rough Order of Magnitude (ROM)

- Project goal(s)
- Project objectives
- Diligence level**
- Scope
- Benefits
- Risks
- Assumptions
- Constraints



Highly tuned templates for regular project types – A “Project Tool Box” concept

## Project Management Activities



## Project Process – Swim Lanes

### Initiate

### Design

### Build

### Implement



**Business**

- High-level requirements

- Seed funding, if necessary

- Funding
- User acceptance testing

- Stakeholder approval



**Producers**

- Log, accept & prioritize request
- Enter into project tracking system
- Assign PM
- Establish project repository
- Detailed requirements
- Project charter

- Functional requirements
- Build vs. buy analysis
- Functional design
- Test plan
- ROI
- Process change

- Work plan
- Procurement
- Create test cases
- Baselining
- Test
- User acceptance testing
- Tuning/optimizing

- Implementation plan
- Change control
- Training documentation
- Training
- Implementation
- Metric review
- Close-out documentation



**Marketing**

- High-level requirements

- Seed funding , if necessary
- Test plan

- Funding
- User acceptance testing

- Stakeholder approval



**Creative**

- High-level requirements

- Seed funding , if necessary
- Test plan

- Create content
- User acceptance testing
- Legal approval
- Code/build (HTML)
- QA

- Implementation
- Stakeholder approval



**IT**

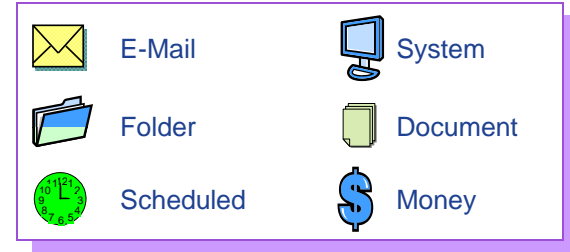
- High-level requirements

- Seed funding, if necessary
- Technical requirements
- Technical Design
- Test plan

- Funding
- Code/Build
- Test
- QA
- Tuning/optimizing

- Stakeholder approval
- Implementation plan
- Change control
- Training documentation
- Training
- Implementation
- Metric review
- Close-out documentation

## Project Flow – Initiate



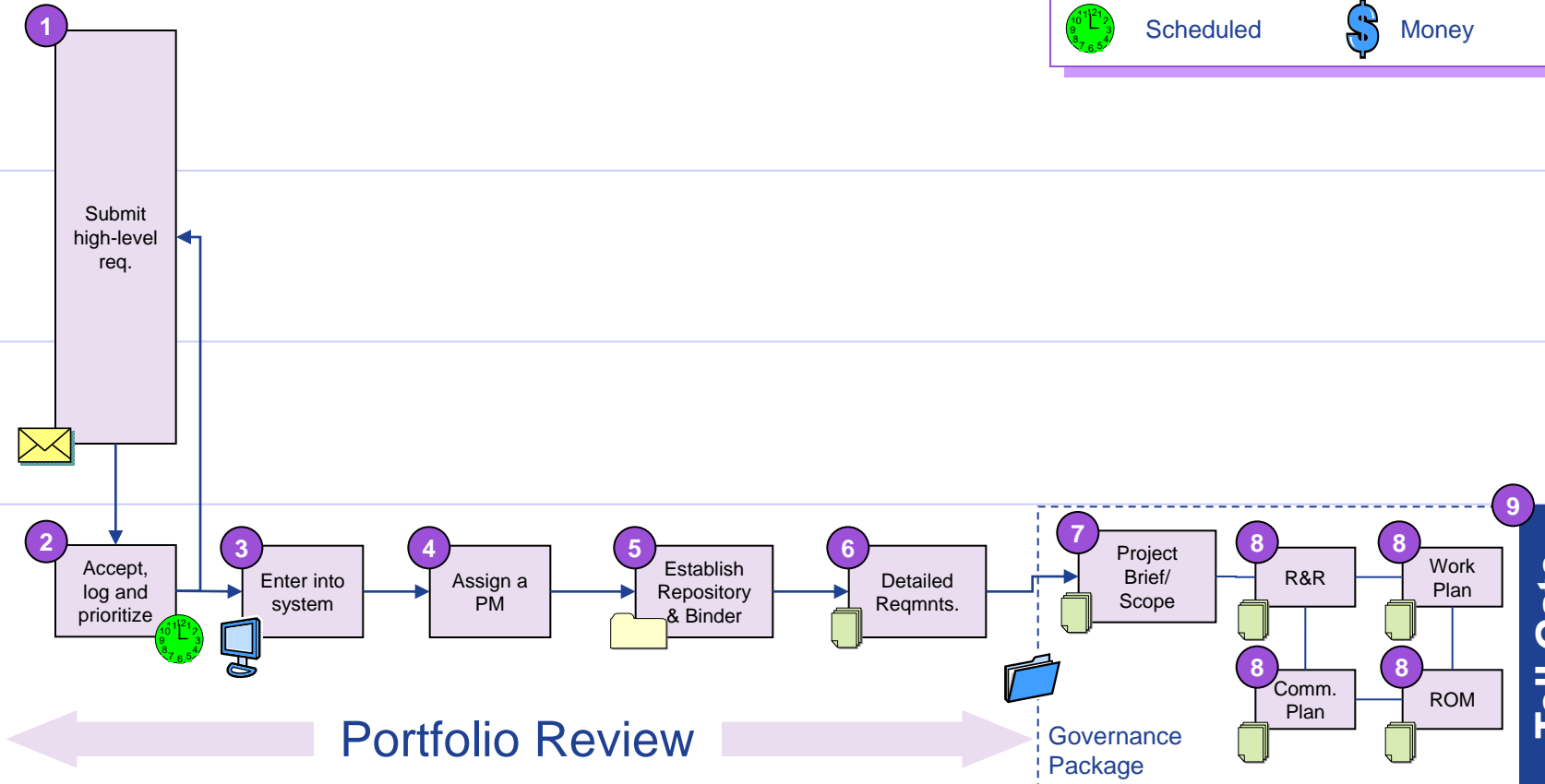
 Business Client

 Creative







 Marketing






 Producers

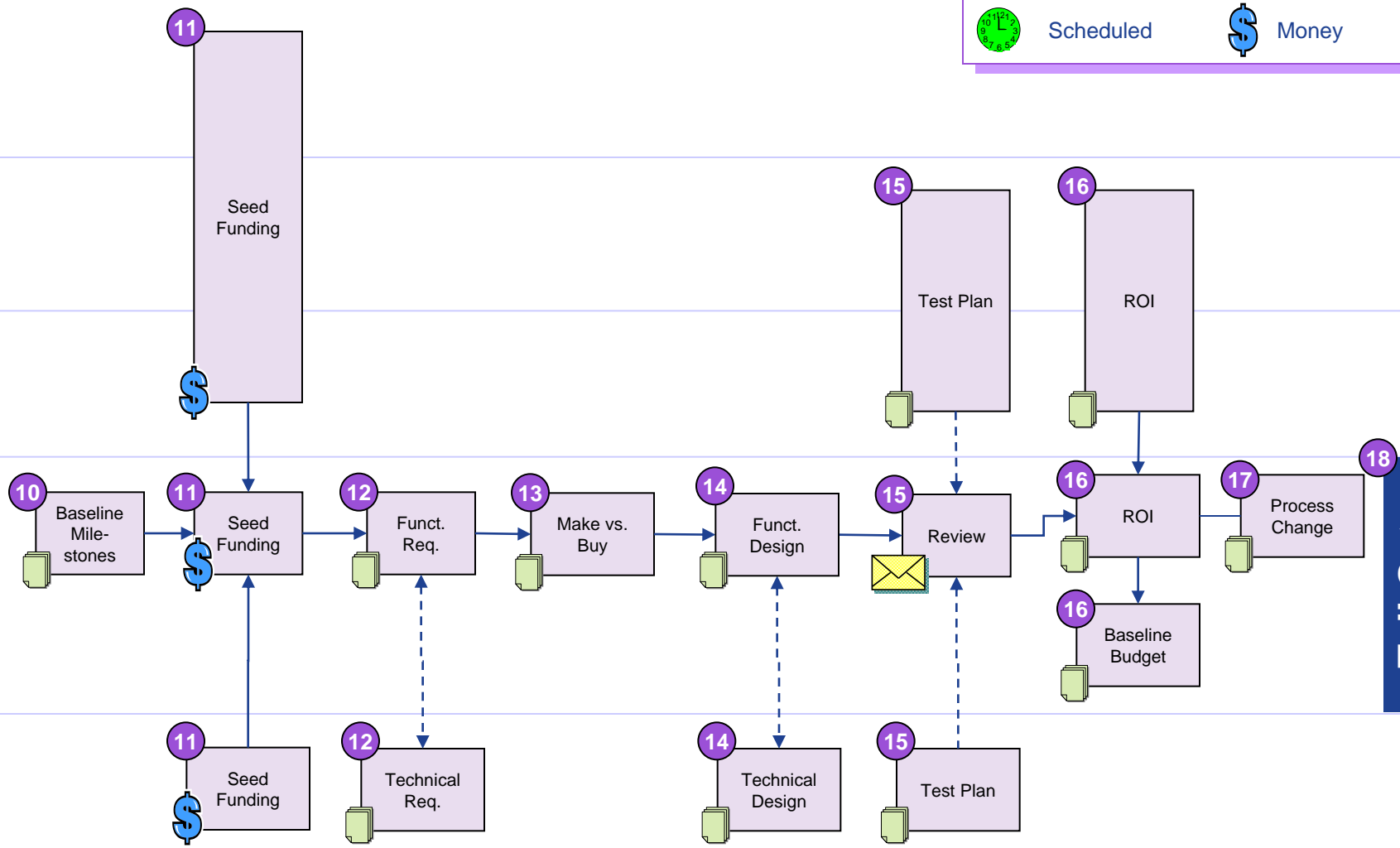
 IT









## Project Flow – Design

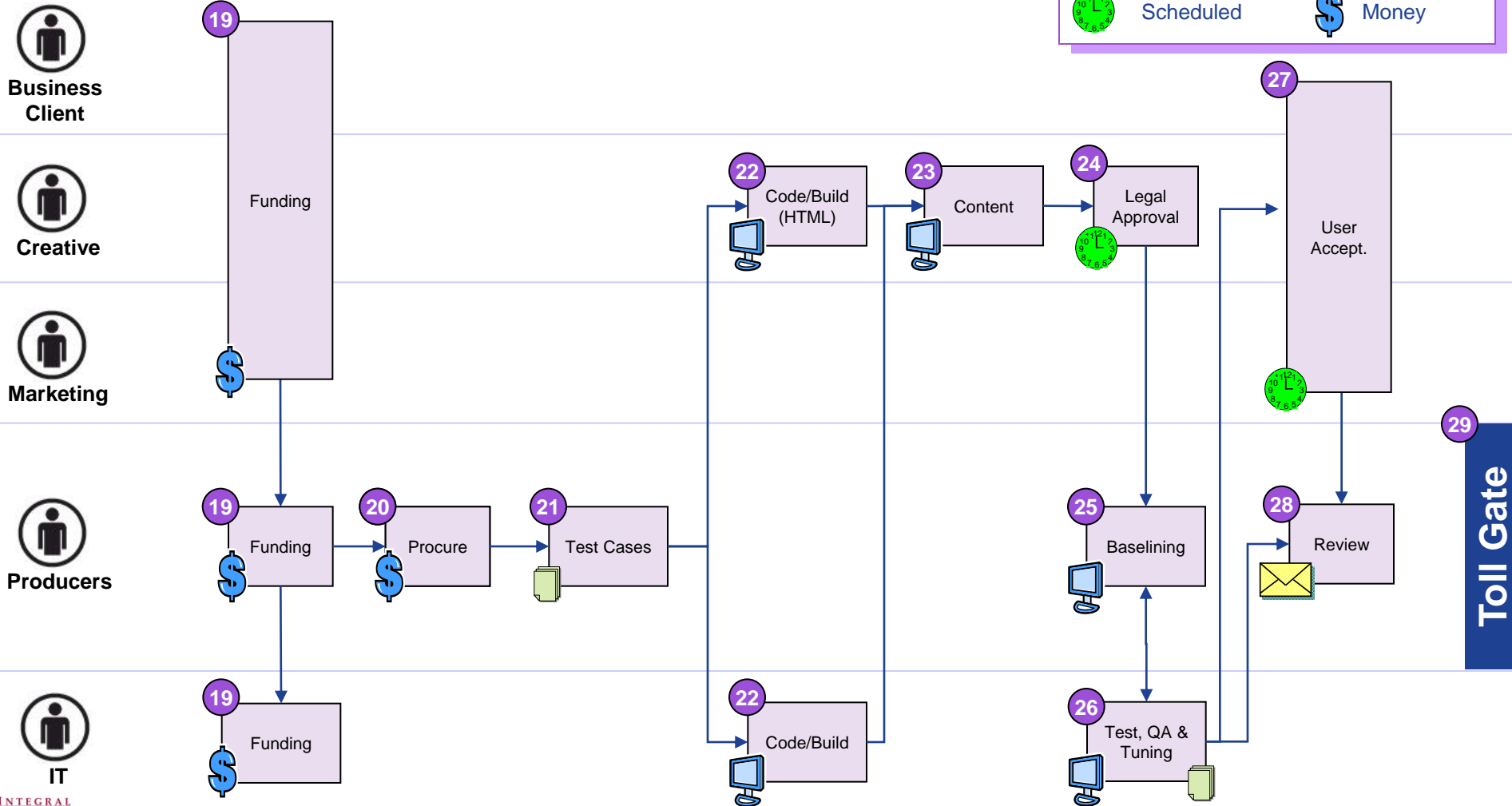
	E-Mail		System
	Folder		Document
	Scheduled		Money

-  Business Client
-  Creative
-  Marketing
-  Producers
-  IT

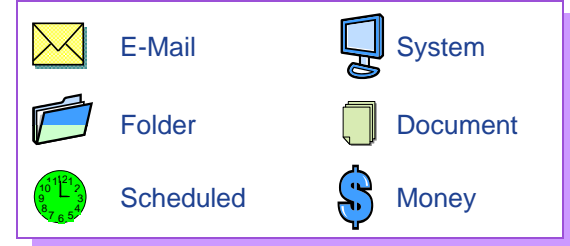


## Project Flow – Build

	E-Mail		System
	Folder		Document
	Scheduled		Money



## Project Flow – Implement



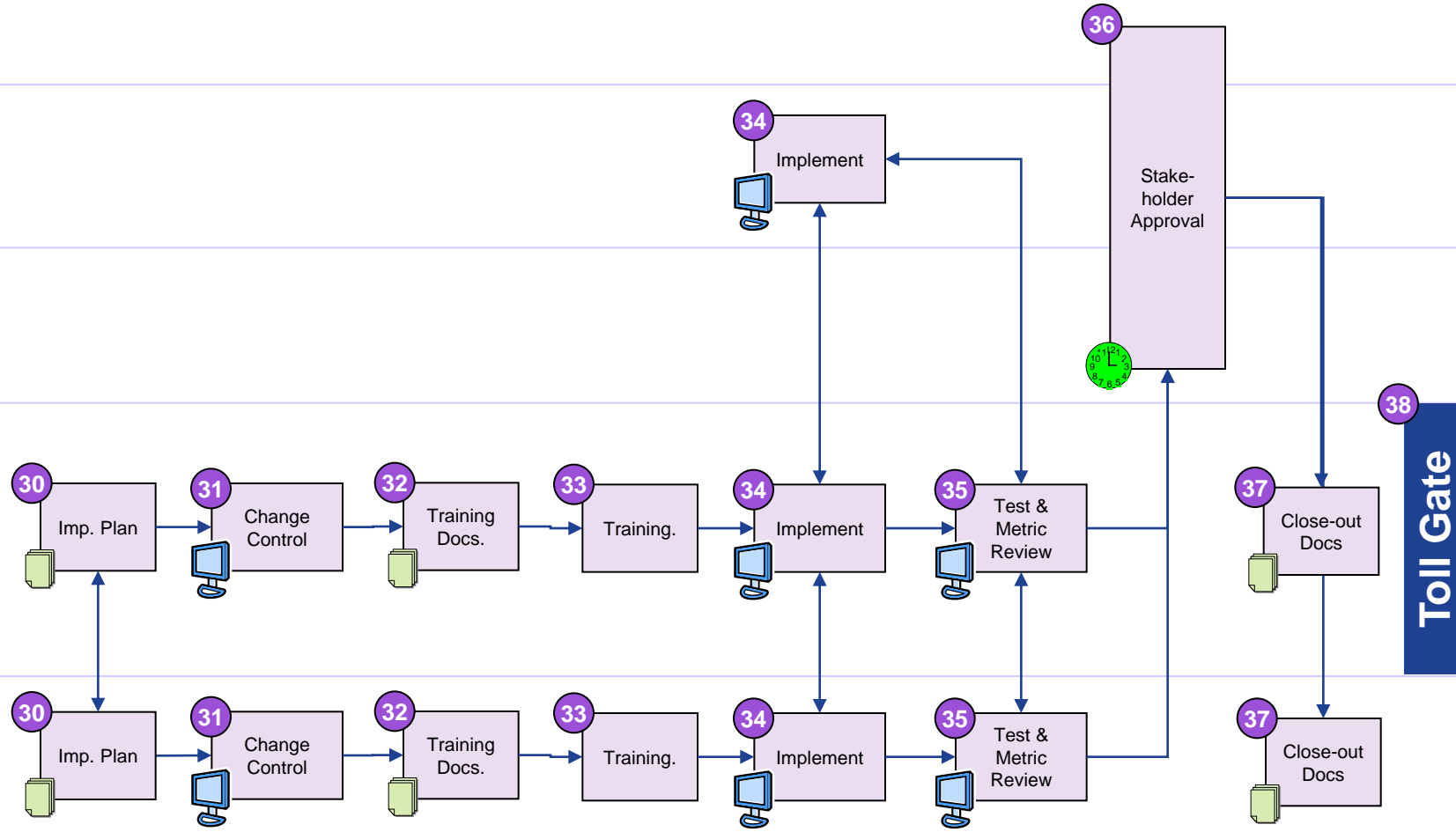
  
Business Client

  
Creative

  
Marketing

  
Producers

  
IT



Toll Gate





## e-Room Structure – Security Hierarchy

	E-Mail		System
	Folder		Document
	Scheduled		Money

### Security Level

XYZ Corp.

#### Public Access

- Project portfolio
- Team charter and organizational charts
- Project methodology
- Project start folder

#### XYZ Corp. Group – General Staff

- Memos
- Team policies
- Team metrics
- Project folders

#### XYZ Corp. Group – Management

- Team status reports
- Staff targets
- Sales targets and metrics





## e-Room Structure - Project folders

	E-Mail		System
	Folder		Document
	Scheduled		Money

### Start

- High-level requirements
- Expected benefits/baseline metrics

### Initiate

- Detailed req.
- Project scope
- Role & responsibilities
- Comm. plan
- Work plan
- ROM

### Design

- Baseline milestones
- Functional req.
- Technical req.
- Make vs. buy
- Functional des.
- Technical des.
- Test plan
- Baseline budget
- ROI
- Process impact analysis

### Build

- Test cases
- Content
- Baseline data
- Test results
- QA results
- QA cert.
- Infrastructure certification

### Imp.

- Implementation plan
- Training docs
- Metric summary
- Close-out documentation

### Artifacts

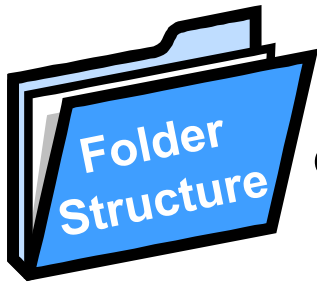
- Quotes
- Brochures
- Meeting Minutes
- Notes
- Contracts
- Tech. specs.
- Project status reports

Public Access



XYZ Corp. - Staff Access





## e-Room Automation

	E-Mail		System
	Folder		Document
	Scheduled		Money

### Start

- High-level requirements
- Expected benefits/baseline metrics

### Initiate

- Detailed req.
- Project scope
- Role & responsibilities
- Comm. plan
- Work plan
- ROM

### Design\*

- Baseline milestones
- Make vs. buy
- Test plan
- Baseline budget
- ROI
- Process impact analysis

### Build

- Test cases

### Imp.

- Implementation plan

### Artifacts

- Quotes
- Brochures
- Meeting Minutes
- Notes
- Contracts
- Tech. specs.
- Project status reports

Templates

Actions

- e-Mail notice to Producers
- Producers approve project
- Pending approval, create project folders

- e-Mail notice to Governance
- Facilitate online approvals
- Pending approval, "unlock" Design folder

- e-Mail notice to Governance
- Facilitate online approvals
- Pending approval, "unlock" Build folder

- e-Mail notice to Governance
- Facilitate online approvals
- Pending approval, "unlock" Implement folder

- e-Mail notice to Governance
- Facilitate online approvals

\* Functional and technical requirements to be created by other teams – as such, templates will not be automatically generated

