

# It's an Plan, It's a Project!

Working with your Vendor with Best Practices  
in Project Management

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October 1, 2013

# We have all done this!

- Been inspired to begin a project
- Began the project
- Stopped to buy a tool we thought we had but didn't have
- Asked for some help when we got stuck
- Wondered how we missed an important aspect of an integrated project issue
- Asked for more help
- Wondered how we went over budget and still wasn't done.

# It all began with an inspiration

- And no practical skills to complete the project
- **Lab Projects are the same!**
  - You come back from a meeting and you want to make an improvement...

# How do we get a handle on a project?

Utilize some Project Management steps

1. PLAN
2. CONDUCT
3. CONTROL
4. CLOSE

# Remember!

- **The nice thing about not planning is that failure comes as a *complete* surprise rather than being preceded by a period of worry and depression.**

# PLANNING – your biggest step

Without the PLAN, nothing can happen

- Research what you want to accomplish – see the big picture, and the details
- Ask your experts for advice – technical manager and lead techs for technical advice, financial piece per each organization
- View the options – meet the vendors with an open mind
- Get bids – request bids from the companies you believe will fit your needs

# Appoint a Project Manager Based on Skills

You need a PM because:

1. You need someone to be the “conductor” of the project. They see the big picture and sweat the details
2. You need someone to coordinate your internal work
3. You have to communicate information up and down the org chart and with the vendor. It should come from one person
4. You have a budget, a time line and staff you need to control it.

# Once you have a Vendor

- Ask them questions on how they manage their projects
  - What is their specific responsibilities for this project? Are you being given a PM from their side? Details, details, and more details. Ask a lot of questions. What you don't know hurts.
  - Are there Project Management tools they use that you can also use for your end of the project?
  - What is the time line of your work and mine?



# Become familiar with PM lingo

## - you will hear it

- Gantt chart – a spreadsheet that includes a timeline, details behind the main activities and a way to organize the work breakdown structure ownership
- WBS – Work breakdown structure – the detail of what work must be completed
- Scope Creep - Adding new aspects to the project after the project has been defined

# Step 2

- **Conduct the Plan!**

- Like a symphony conductor, he follows a script of notes, you have a script of work
- Put detail to the WBS it will affect your budget
- Incorporate a communication plan – for the Project Sponsor, Staff and Vendor
  - the method of communicating,
  - the frequency of communicating,
  - the where will that take place

# Step 3

- Control the work
  - Set review time for the budget
  - Watch for risks to the timeline
    - Delivery of lab equipment, work space, available workforce
    - Vendor availability to your schedule of completed work
    - Look for dependency of events

# Step 4

- Close the Project when you have your vision completed.
  - The vendor has done what they said they would do
  - The staff is ready and excited to begin working with the result of the project
  - You can balance your budget and maybe have money left over for a party!

# What happens if you don't use PM steps or PM tools

- You will be working without a complete plan
- You will not know what you are responsible for
- You will not know what the vendor is responsible for
- You will not be able to conduct the work because you won't know what the work is
- You will be over budget because you didn't plan for the work you need to do
- You will not complete the project because you keep creeping the scope
- You will have to answer to the Project Sponsor who gave you the \$\$ for the project!

# 3 Actions to Take

- Pretend a project! See if you can work out the large picture of what you want the project to accomplish and what it would take to get there.
- You need to excite and inform your staff, what does your communication plan look like? How often do you want to meet with your vendor?
- Look for a future PM in your lab. It could be someone in the management staff but it doesn't have to be. Look at skill sets in your staff that lend themselves to PM. Whoever has the ability to drive, commands respect within the organization, has the attention to detail should be at the top of the list.

# Thanks for you attention!

- Good luck on you next project
- If you need some staff training, call me!