Project and Operational processes, Key differences.
Gotchas when deploying projects into operations
Purpose of this Presentation

- Assist the smooth implementation of projects into production
- I’ve heard too many times of individuals managing operations via project management tools
- Processes are suppose to reduce work, not create work
- Processes are there to assist in achieving objectives not work counter them
- Processes are there to improve communications between team and individuals, not generate more confusion
- Highlight opportunities for conflict or success
- You have to be exceptional to dance a Salsa to the Waltz beat, applying the wrong process to the wrong type of work will cause issues
Format / Structure

• Identify key management points

• Identify differences between Projects and Operations

• Summaries why its important to factor in these differences for successful deployment of projects into operations

• Looking at Operations from an ITIL Perspective

• Looking at Project Management from PMP Perspective
Summary

• Factor in operational requirements from the very start of the project

• Understand that you will require different methods of defining success, measuring success, reporting, technical support etc from projects and operations. You cannot simply directly translate them from the project to operations. They need to be transitioned.

• Communicate with Operations throughout the lifecycle of the project

• Have a very clear and agreed project acceptance criteria from operations (will be different to the business) and agreed time frame for project closure and operational acceptance)
Who am I?

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- Global Systems Management (app and ops)
- Global Project Manager
- Masters in Project Management, ITIL Expert certification
- Just a little bit process oriented
- Currently working as Program Manager for Bank of America. BASEL III System readiness
Target Audience

- Anyone
- Team Managers, Operations and Projects
- Members of Operations Teams
- Members of Development Teams
- Managers of Operations and Development
- Those trying to juggle Operational work and Project work
Agenda

• Importance for Organizational Development and Growth
• Definitions and Differences
• Breakdown and comparison by key areas
  • Governance
  • Team Composition
  • Identification of work modules
• Measurement Metrics
• Release Management
• Documentation Requirements
• Reporting Requirements
• Error correction and identification
• Business interaction, communications
• Technical Support
• Project and Operational Structures in the Organization
• Transitioning a Project into Operations
• Key Tips for successful implementation of collaboration projects into production
• Summary
Importance of Organizational Development and Growth

Projects

• Drive Change and Progress in the Service
• Mechanism for taking advantage of opportunities
  • Reduce Costs
  • Increase Productivity
  • Flexibility to change to meet changing business requirements

Operations

• Protect the service
• Ensure that day to day business is taken care of
• Ensure transition of projects into production
• Continuously improve quality of service
Definitions and Differences
Leaders objectives

**Project Manager**
- Protects the deliverables
- Time
- Cost
- Quality

**Operations Manager**
- Protects the Service
- Availability Management
- Capacity Management
- Budget Management
- Service Delivery Management
- Security
Definitions and Differences

**Time**

- **Projects** have a definitive start and a definitive finish
- **Operations** are continuous

**Task Type**

- **Projects** tasks are specific for that project and have never been done before
- **Operational** tasks are repetitive and cyclical

**Success/Improvement Criteria**

- **Project work** success is based on project objectives identified specifically and uniquely for that project
- **Operational** work success is based on previous indicators (i.e. system availability)
Definitions and Differences

Change Type
- **Projects** implement revolutionary change
- **Operations** implement evolutionary change

Team continuity
- **Project** Teams are formed to implement projects and then disbanded once the project is completed
- **Operational** Teams are consistent

Team Composition
- **Project** teams consist of team members from different departments, different skill sets
- **Operational** teams frequently consist of team members with similar technical skill sets
Governance

• Important to understand who is responsible for what

• Who is leading what?

• Different roles and responsibilities

• Different governance structure

• Not understanding boundaries can lead to conflict

• In a Matrix Organization it can be really important to understand the difference
Governance

Projects

• Project Manager has accountability and authority

• Frequently use consultants, they only care about their tasks on the project not what happens when they leave, and in fairness its not their responsibility

• Stakeholders
  • The business
  • Operations
  • Projects can have a flat hierarchy
  • Career paths for team members is not clear
  • PM sets the priorities
Governance

Operations

• Organizational Structure

• Multi level - Hierarchy

• Clearly defined career paths

• Needs must defines the priorities (System down is a priority)
Identification of work modules

Project objectives \rightarrow Deliverables \rightarrow Resources required \rightarrow Time

- Project Task Scheduling
- Deadline focused
- Skills focused
- Very specific work modules
- Non Repetitive tasks
- Jigsaw impact of tasks
- Each task has a deliverable that contributes to project success
- Time, Cost, Quality
Identification of work modules

IT Operations

• Identify what service you are delivering to the customer
• Identify how to measure quantity of delivery
• Identify how to measure quality of delivery
• Identify the following ways of managing / tracking
  • Standard Service Requests
  • Support
  • Availability Management
  • Incident & Problem Management
  • Capacity Management
  • Release Management
  • Budget Management
  • Change Management
Measurement Metrics

- Are you doing a good job?
  - Achieving the Goal
  - Effective
  - Efficiently
  - Improving

- You have invested a fortune, are you getting your moneys worth?

- Are we making good use of our resources?

- How do we plan for the future?
Measurement Metrics - Projects

• Objectives
  • Why the project is established, a focused statement of intent
  • Sets the boundaries of the project
  • May include what the project is NOT

• Deliverables
  • Tangible items
  • Deliverables achieve objectives

• Critical Success Factors
  • Measures the success of the project
  • Quantifiable metrics
  • Time, Cost and Quality
Measurement Metrics - Operations

- **SLA’s - Service Level Agreements**
  - Quantifiable Metrics on Quality of Service
  - Level of Service is formally defined
  - Contracted Delivery measurement of a service
  - May have financial implications
  - Measures Quantity / Quality of delivery of service and hence service team
  - You meet them or break them

- **KPI’s - Key Performance Indicators**
  - Impact on SLA
  - In Operations would be Technical KPI’s
  - KPI’s - Used to show continuous improvement
  - **Incidents**
  - Reactive
  - Proactive
Release Management

- It's cyclical, you do it again and again

- Same team

- Same Success Measurement Metrics every time

- Normally impacts on multiple teams

- It's not going to be the exact same every time

- It has a definite start and a definite finish

- At the end of every project / release you need to have a review. What worked what did not to factor into next release / project
Release Management - Factors to consider whether its a project

- Is this something completely new?
- Size of Release
- Amount of teams involved
- Risk to the company
- Cost of release
- Complexity
- The actual release can be PART of a Project
- Does it need a dedicated Project Manager?
Release Management

Operational

• System upgrade
• Is a patch release a project or release?
• Is a version upgrade a release or a project?

Application

• Does it depend on the size of the change?
• Do you have a dedicated Application support / Development team
• Do you outsource development?
• Process for Problem Management and resolution?
Documentation Requirements

• Documentation is critical to everything

• Critical for business continuity to ensure that critical elements are documented

• Compliance requirements

• Insures against loss of tacit knowledge in Key Team Members

• Valuable training tools

• Observation - projects tend to get documented, less so with Operations, Operations evolve, rarely clearly defined and documented
Documentation Requirements

Projects

- Project Charter
- Constraints and Assumptions
- Communications Plan
- Procurement Management Plan
- Risk Management Plan
- Quality Management Plan
- Work Break Down Structures - Activity Lists
- Project Organizational Structure
- Project Wrap-up report
Documentation Requirements

Operations

- Daily, Weekly, Monthly Checklists
- Frequently asked Questions
- Standard Service Requests (Delegate them)
- Security
- Business continuity and DR Strategy

Process

- User Provisioning
- Maintenance Schedules
- Release Procedure
- Application
  - Release Notes
  - Application Architecture
  - Security
Reporting Requirements

• Managers / Project Managers need visibility into Project / Operations

• Information is required for decision making

• You cannot identify what is an exception if you do not understand normal

• Different levels of details are required at different levels

• Ensure that information delivered is relevant to its target Audience
Reporting Requirements

Projects

• Time (Schedule)
• Cost (Project Budget)
• Quality (Delivery Management)
• Unique to each project
• Critical to track success of project
• Include the Operations team (who will ultimately take responsibility), even if they are not directly part of the project, in the reporting.
• Different data required for Key and Secondary stakeholders
• Inbound from external suppliers is normally exceptionally important
Reporting Requirements - *Operations*

- SLA Management
- SLA, Trend and Exception Management
- Service and System Management
- System & KPI Management
Reporting Requirements

System Reporting (KPI)

Service Reporting (SLA)

Operations

Customer

CIO

Upper Management

Middle Management

Administration
• Reporting Requirements
  Operations

Different types of reporting required

- Technical = KPI’s
- Management = KPI’s / SLA’s
- Customers = SLA’s

- Cyclical - Performance is based on previous indicators (what previous indicators?)
- Continuous, Repeatable, can be automated
- Ensure underpinning contracts that impact on SLA Match your SLA

Key requirements for

- Capacity management
- Availability Management
- Standard Service Request Management
  - (Volume, Quality)
- Incident Management
  - Reactive Incident Management
Error Correction and Identification

- Functional and Quality Checks

- Are the project deliverables being developed to meet functional and quality expectations?

- Is the Service being delivered providing the expected service to the expected quality levels?
Error Correction and Identification

- Projects
- Focus’s on Project deliverables
- Schedule and Resource management
- Budget Management
- Unique to each project
Error Correction and Identification

- Operations
  - Identify and Track KPI’s that impact on SLA’s
    - Manage the KPI’s and the SLAs take care of themselves
  - Incident Management -> Problem Management
- Incident Classification
  - Reactive Incidents
  - Proactive Incidents
- Alert Classification
- Log Analysis
Business Interaction

• Everything revolves around the business

• Projects are not for the hell of it

• Points of interaction and communications are essential
Projects

• Most projects will have a business sponsor

• Business Sponsor is a Key Stakeholder in the project and involved in all Key Stakeholder staging meetings

• Business Sponsor agrees Critical Success Factors and signs off on finished project

• Business Sponsor more than likely pays for the project

• Project Manager manages the relationship with the Business Sponsor

• Business need to perform UAT (User Acceptance Testing)
Business Interaction

**Operations**

- Customer defines the Service Delivery Metrics with Service Manager
- Customer receives a regular report on Service Metrics
- Service Strategy is reviewed on a regular cycle (maybe annually)
- Maintenance windows
  - Need to be agreed / Communicated with the business
- Availability expectations
- DR / Business Continuity expectations, requirements
- Application Release Management
  - Problem Management
  - UAT Testing
Technical Support

• Working with IT Projects and Operations users need support

• Can be a dedicated Service desk or just go directly to Admin team

• Good support is critical to the success of operations / projects

• Require excellent communication and technical skills

• Problem Solver and Customer focused
Technical Support

Projects

• Depends on the Projects
• May have dedicated Technical support or use operations Service support
• Have a handover period to operations with a definite cutoff date

Operations

• Ensure that you have adequate staffing to meet expected increase in incidents
• Ensure there is a handover period from projects to Operations
• Ensure there is a tracking mechanism for incidents related to project implementation (so that project related incidents do not impact on operational metrics)
• Ensure that it has to be signed off and accepted
• Ensure that there is a roll back mechanism

• Persistent Pilots ;-)}
Technical Support

Operations

- Primary point of interaction with the customer
- Incident Management
- Be careful of definition of incidents
  - Something is broken
  - Something is not working the way it is suppose to
  - User is unable to work (they forgot their password)
- Have a system for tracking (Service desk, Key support point)
- Differentiate Proactive and Reactive Incident
- Have a problem management process
  - Operations
  - Applications
Project and Operational Structures

Typical Matrix organization

Chief Executive

Functional Manager
- Staff
- Staff
- Staff

Functional Manager
- Staff

Functional Manager
- Staff

Manager of Project Managers
- Project Manager
- Project Manager

(Black boxes represent staff engaged in project activities.)

Project Coordination
Project and Operational Structures -
Matrix Organization

**Pros**
- Utilization of Skills from Operations
- Eases acceptance of Projects into Operations
- Maximum efficiency and use of resources
- Knowledge sharing
- Individual Development

**Cons**
- Resources can have conflicting priorities
- Urgent operational requirements take precedent over Projects (Keep day to day operations going)
- Difficult to allocate time
Transitioning a project into Operations

• Before even starting project perform a LifeCycle Cost Analysis
  • What will it cost to develop, build and maintain this project

• Identify all of the Operational Requirements and factor into Project
  • Support
  • Backup
  • DR
  • Monitoring and Reporting

• Factor in a handover and support period. Do not throw and run. Have a formalized acceptance Criteria

• Ensure there is a Roll Back option / Decision Criteria

• Have a mechanism for tracking incidents directly related to project implementation

• Have agreed sign off time period and acceptance criteria
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• Communicate with Operations throughout the lifecycle of the project

• Have a very clear and agreed project acceptance criteria from operations (will be different to the business) and agreed time frame for project closure and operational acceptance)
Summary

• Project and Operational Projects are different

• Successful co existence is critical

• Not understanding the difference can lead to confusion
Thank you!!

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