



# The Accidental Project Manager

## Roles and Responsibilities for the Newly-Promoted

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# Birth of the APM



- Developer
- Business analyst
- Power user
- Senior manager's pet

# Training of the APM



- Organization's training program in software project management and development methodology
- Outside courses or tutorials
- Mentoring by experienced software project manager
- Mentoring by SQA manager
- Sink or swim

# APM's greatest challenges



- Phases of development
- Roles of project manager

# Development phases



Before coding: analysis and planning



During development: design and construction

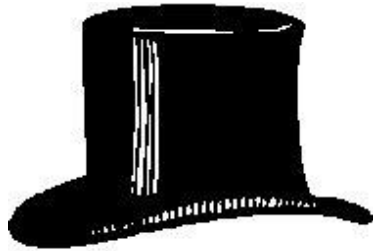


At rollout: integration and deployment

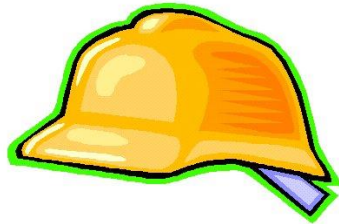


After release: assimilation and maintenance

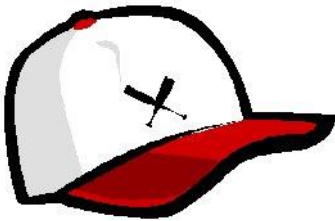
# Project manager roles



Entrepreneur



Technology partner

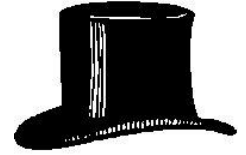


Team captain





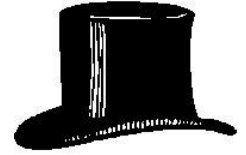
# Before coding: entrepreneur



- Know the users
- Know the management
- Know the environment



# Before coding: entrepreneur



- Know the users
  - Assumptions
  - Fieldwork
  - Data analysis
  - Advisory groups



# Before coding: entrepreneur



- Know the management
  - User community
  - IT department
  - Cultural issues



# Before coding: entrepreneur



- Know the environment
  - Hardware configurations
  - Software standards
  - Tools
  - Administration
  - User support



# Before coding: technology partner



- Define the product
- Analyze the requirements
- Create the plan
- Present the proposal





# Before coding: technology partner



- Define the product
  - Project request
  - Feasibility study
  - Product definition



# Before coding: technology partner



- Analyze the requirements
  - Design
  - Infrastructure
  - Tools
  - IT services
  - Administration



# Before coding: technology partner



- Create the plan
  - Methodology
  - Process
  - Work breakdown
  - Industry statistics
  - Productivity factors



# Before coding: technology partner

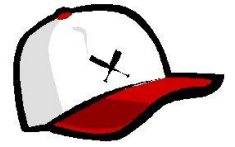


- Present the proposal
  - Participants
  - Contents
  - Negotiation



Before coding:

team captain

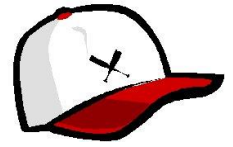


- Form the team
- Provide training
- Foster collegiality





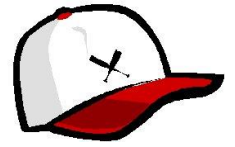
# Before coding: team captain



- Form the team
  - Team members
  - Team profile
  - Resource time line
  - Job descriptions
  - Interviews



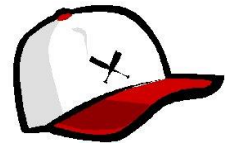
# Before coding: team captain



- Provide training
  - Background information
  - Development strategy
  - Project tracking



# Before coding: team captain



- Foster collegiality
  - Social activities
  - Group assignments
  - Attitude



# During development: entrepreneur



- Confer with users
- Communicate with management
- Plan education and support



# During development: entrepreneur

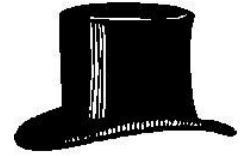


- Confer with users
  - User interface design
  - Testing
  - Process adjustment





# During development: entrepreneur



- Communicate with management
  - Scope creep
  - Organizational change
  - Outsourcing
  - Conflicts



# During development: entrepreneur



- Plan education and support
  - User documentation
  - Training
  - Troubleshooting



# During development: technology partner



- Create appropriate test plans
- Organize the workshop
- Track program changes
- Rehearse the deployment



# During development: technology partner



- Create appropriate test plans
  - Testing overview
  - Test plan criteria
  - Test methodologies
  - Test priorities
  - Success factors



# During development: technology partner



- Organize the workshop
  - Documentation library
  - Version control
  - Configuration management



# During development: technology partner



- Track program changes
  - Change management process
  - Tools for change management
  - Issues of change management



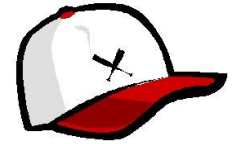
# During development: technology partner



- Rehearse the deployment
  - Choreography of product launch
  - Advance preparations
  - Installation test



# During development: team captain

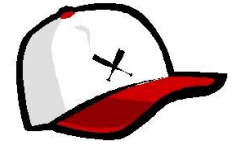


- Maintain standards
- Share information
- Deal with conflicts





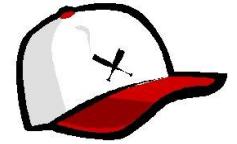
# During development: team captain



- Maintain standards
  - Definition
  - Modification
  - Consistency



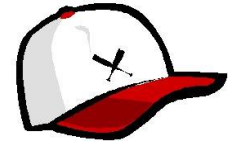
# During development: team captain



- Share information
  - Requirements
  - Progress
  - Quality



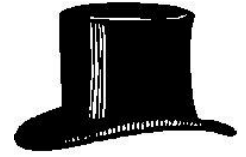
# During development: team captain



- Deal with conflicts
  - Resource balancing
  - Health and environment
  - Human behavior



# At rollout: entrepreneur



- Manage expectations
- Create a buzz
- Schedule training



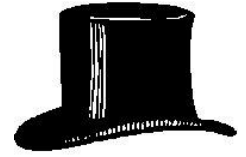
# At rollout: entrepreneur



- Manage expectations
  - Triage
  - Launch types
  - Disclosure



# At rollout: entrepreneur



- Create a buzz
  - Timing
  - Media
  - Coordination



# At rollout: entrepreneur



- Schedule training
  - Compulsory / voluntary
  - Logistics
  - Phases



# At rollout: technology partner



- Coordinate environment changes
- Test the production system
- Track problems and questions





# At rollout: technology partner



- Coordinate environment changes
  - Impact on the environment
  - Expansion of the project team
  - Special documentation
  - Deployment project plan



# At rollout: technology partner



- Test the production system
  - Special test plan
  - Incentives for participation
  - Arrangements for downtime
  - Rollback procedures



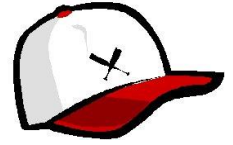
# At rollout: technology partner



- Track problems and questions
  - Unforeseen events
  - Resource monitoring
  - Inputs to knowledge base



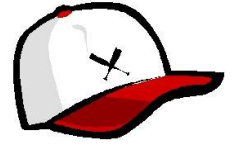
# At rollout: team captain



- Pull your team together
- Pull yourself together



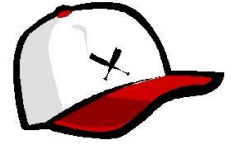
# At rollout: team captain



- Pull your team together
  - War Room
  - Opening night jitters
  - PM's finest hour



# At rollout: team captain



- Pull yourself together
  - Team dynamics
  - Stamina
  - Role model
  - Perspective



# After release: entrepreneur



- Monitor acceptance
- Empower your users
- Report to management



# After release: entrepreneur



- Monitor acceptance
  - Initial resistance
  - Data gathering
  - Personal reports





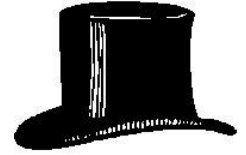
# After release: entrepreneur



- Empower your users
  - Point person profile
  - Recruitment
  - Training
  - Turnover



# After release: entrepreneur



- Report to management
  - Client
  - IT services
  - PMO



# After release: technology partner



- Plan maintenance
- Compile statistics
- Evaluate tools
- Finish documentation



# After release: technology partner



- Plan maintenance
  - Maturity and entropy
  - Enhancements
  - Environment changes
  - Decommissioning



# After release: technology partner



- Compile statistics
  - Environmental impact
  - Project plan variance
  - Development metrics
  - QA metrics



# After release: technology partner



- Evaluate tools
  - Project planning
  - Development
  - Testing
  - Forms and templates



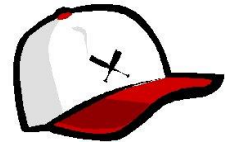
# After release: technology partner



- Finish documentation
  - Project closure
  - System reconstruction
  - Test arsenal
  - User education



# After release: team captain

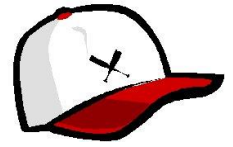


- Recognize accomplishments
- Evaluate performance
- Schedule training
- Celebrate





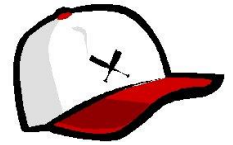
# After release: team captain



- Recognize accomplishments
  - Team focus
  - Individual acknowledgments
  - Publicity



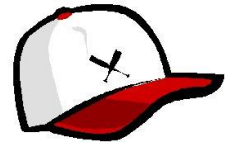
# After release: team captain



- Evaluate performance
  - Team members
  - IT colleagues
  - Consultants and vendors
  - Self



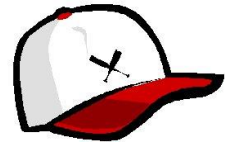
# After release: team captain



- Schedule training
  - Domain knowledge
  - Business analysis
  - Planning and estimating
  - Tools
  - Professional growth



# After release: team captain



- Celebrate

- Timing
- Budget
- Cultural issues
- Team preferences
- Camera
- Speeches
- Honor and glory

 WILEY

# *The* **Accidental Project Manager**

Surviving the  
Transition  
from Techie  
to Manager

Patricia Ensworth



