



# PROJECT MANAGEMENT IMPROVEMENT PROGRAM

Review Panel Presentation

Scott Roberts | 10/18/2016



# PRESENTATION OUTLINE

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- Historical Challenges
- Strategic Initiative Approach
- Accomplishments
- Next Steps
- Measuring Benefits

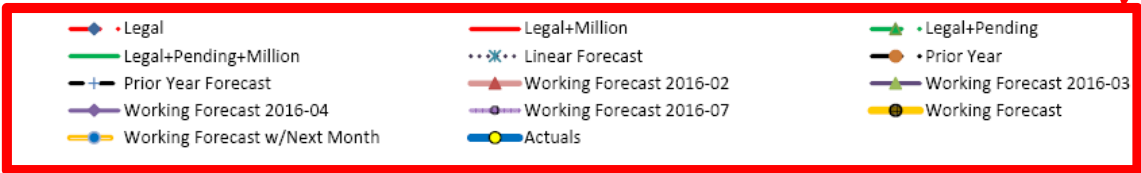
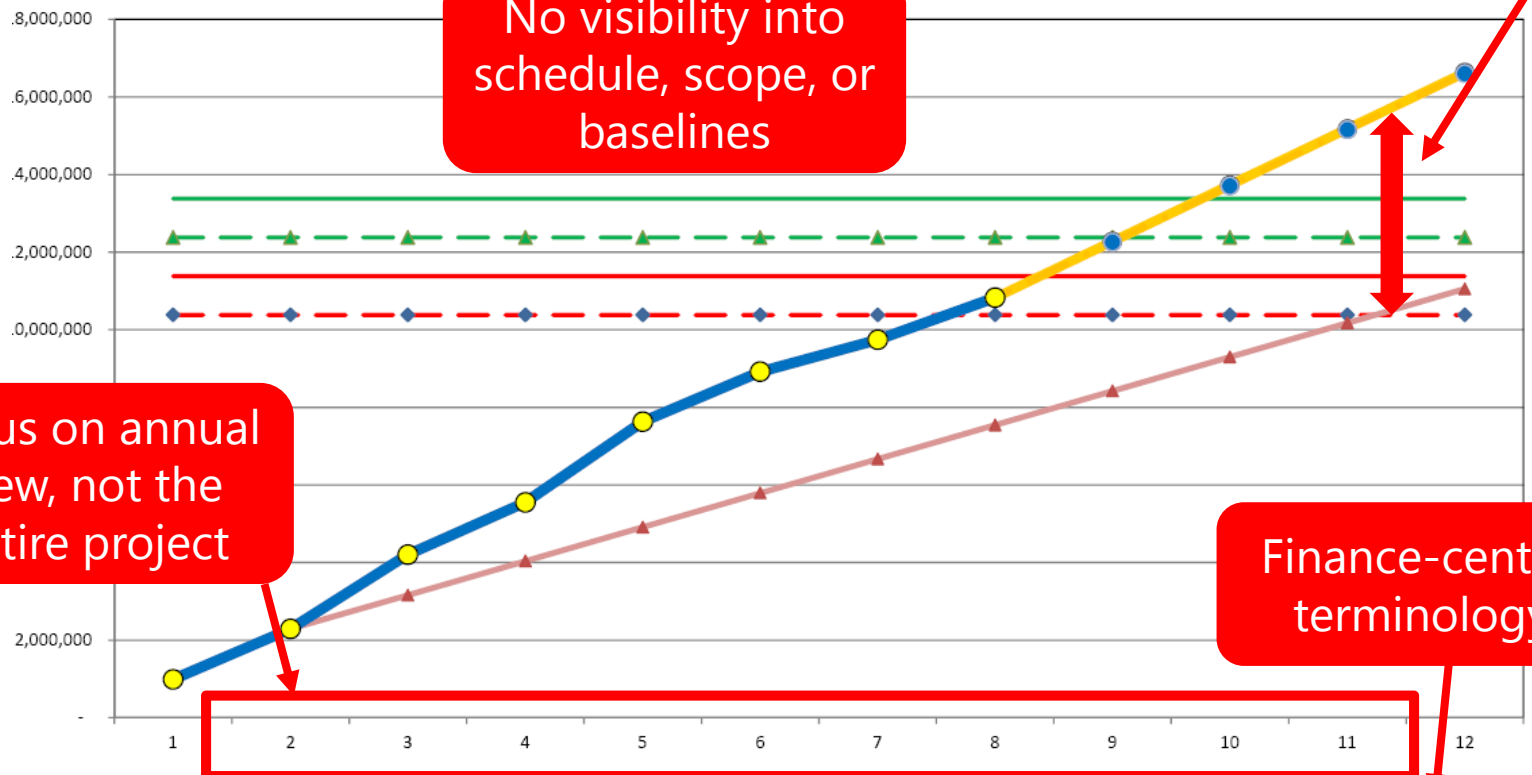
# HISTORICAL CHALLENGES

Cost & Schedule Overruns

No visibility into schedule, scope, or baselines

Focus on annual view, not the entire project

Finance-centric terminology



## HISTORICAL CHALLENGES

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- Differing practices & terminology
- Poor project definition
- Unclear roles and responsibilities
- Inconsistent baselining
- Informal change control
- Lack of project data
- Insufficient tools



# STRATEGIC INITIATIVE IDEAS

Strategic Initiative

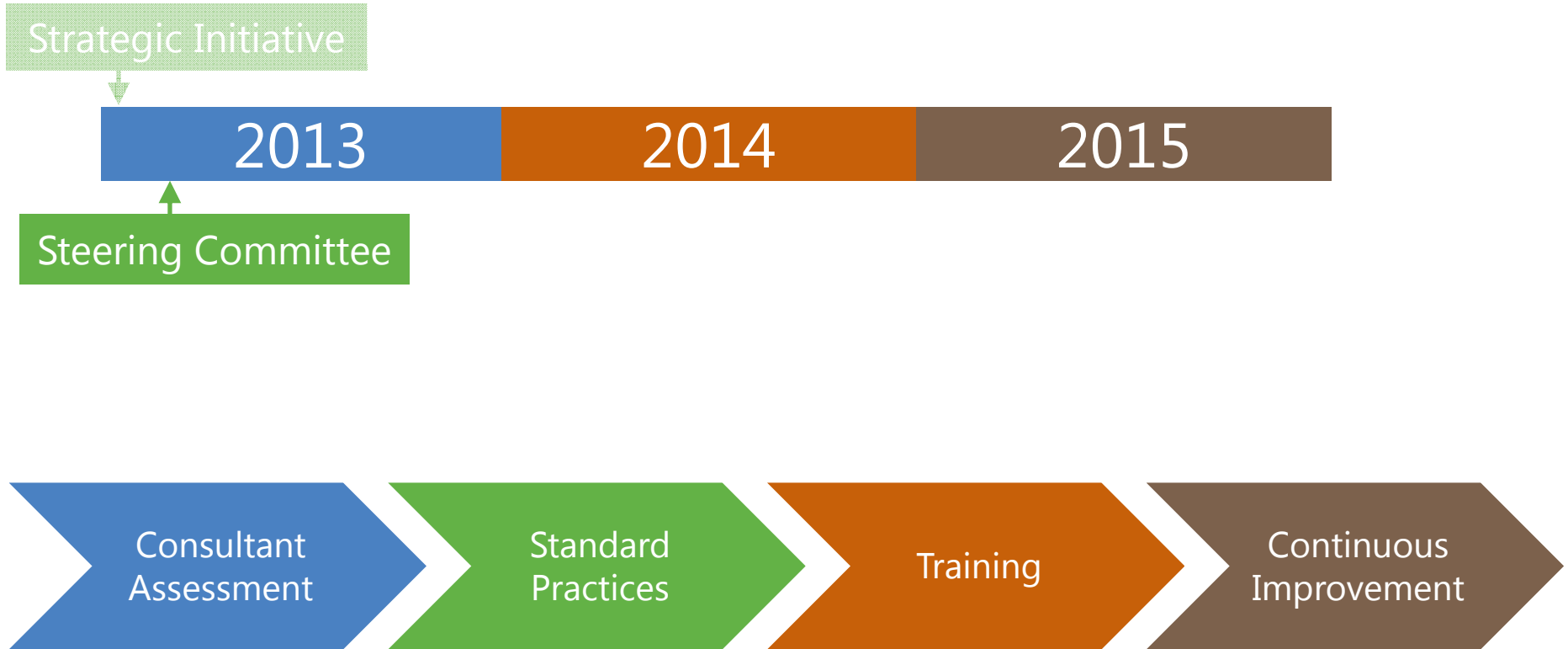
2013

2014

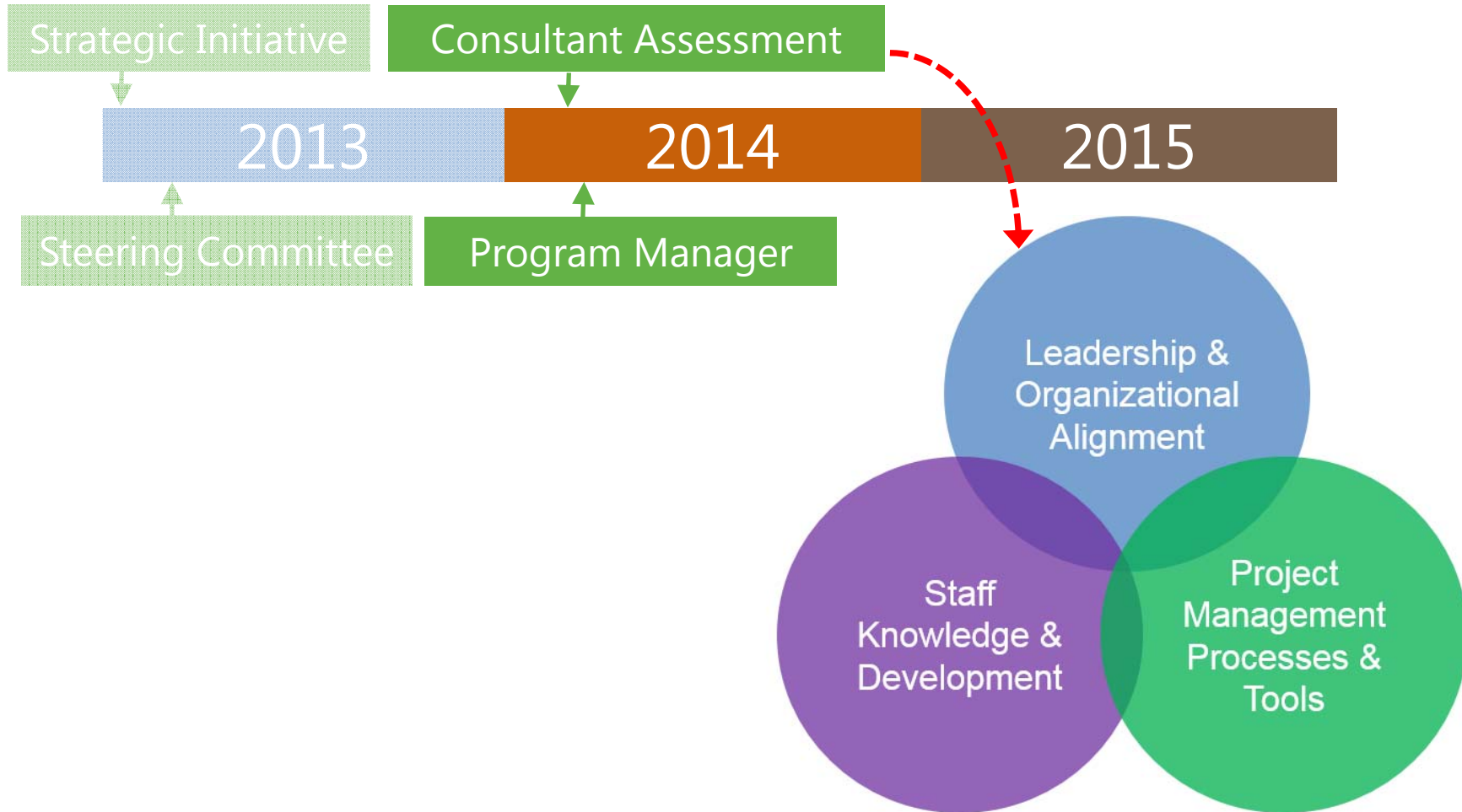
2015



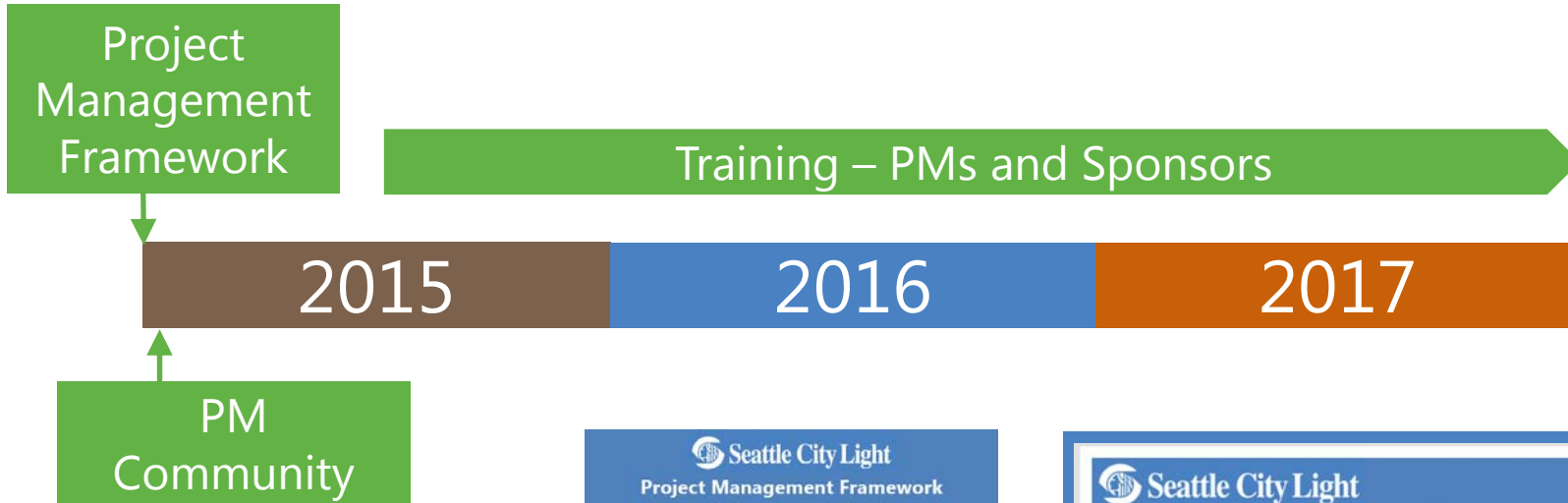
# APPROACH



# AREAS FOR IMPROVEMENT



# BUILD A FOUNDATION



**Seattle City Light**  
**Project Management Framework**  
*Consistent processes, tools, and templates.*  
*helping City Light Project Managers successfully deliver projects.*

Quick Links, Tools and Templates

- Introduction - Welcome to the Framework ..... 1
- Project Management Framework Checklist ..... 1
- Process Group 1 - Initiation ..... 8
- Project Filing Structure ..... 8
- Project Charter ..... 12
- Project Charter - Review Checklist ..... 12
- Roles and Responsibilities Table ..... 17
- Project Team Co-off Agenda ..... 17
- Process Group 2 - Planning ..... 18
- WBS Template (See Figure 3 for Instructions) ..... 19
- WBS Checklist ..... 19
- Risk Register ..... 24
- Risk Identification Tool ..... 24
- Communications Plan Template ..... 29
- Rate and Social Justice Tools ..... 29
- Liability Template (See Figure 11 for Instructions) ..... 33
- Cost Management Template ..... 38
- Contingency Estimating Tool ..... 38
- Project Plan Approval template required ..... 46
- Project Plan Review Checklist ..... 46
- Process Group 3 - Execution ..... 47
- Project Status Report ..... 47
- Advanced Project Status Report ..... 47
- Project Status Meeting Agenda ..... 47
- Lessons Learned Site ..... 47
- Change Request Form ..... 48
- Change Register ..... 48
- Issue Register ..... 51
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- Communication Event Register ..... 53
- Project Status Report ..... 53
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- Cost Management Template ..... 55
- Project ID Manual ..... 55
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- Appendix B - Information Technology Requirements ..... 67

**Seattle City Light**  
**Project Management Improvement Program – Feedback / Lessons Learned**

Enter your idea or search term here...  [Add a new one](#)

Or leave us a private message

**Knowledge base** [New article \(FAQs\)](#)

**Training Videos**

- Setting up Projects for Success
- Estimating Challenges and Techniques
- Project Management Community Demo
- PM Framework Orientation Training in Cornerstone
- Project Management Lifecycle Training
- Lessons Learned
- Change Management vs. Contingency
- 10 Step Video Archive
- Project Management Improvement Program - Quick Tour
- Effective Project Sponsorship Training in Cornerstone

**Templates**

- Where are the latest templates?
- Do I have to use the templates?
- Who signs the Charter/Project Plan/Change Request?

**Estimating**

**PM Framework**

- What is the definition of a project?
- Is my project exempt from the Charter or Project Plan Approval requirement?
- Key terms from the PM Framework?
- Does the framework follow industry standard practices?
- How to write quality lessons learned statements
- How is a Project Plan different from a Design Plan?

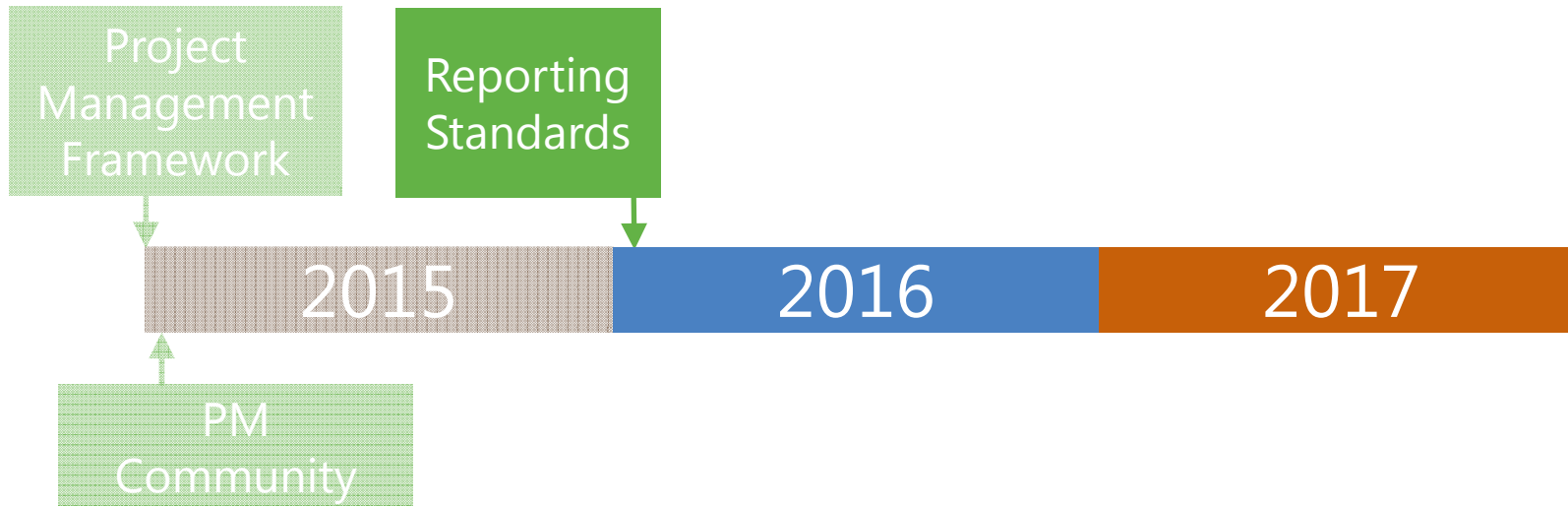
**Scheduling**

- How do I create a task that covers an entire phase or project?

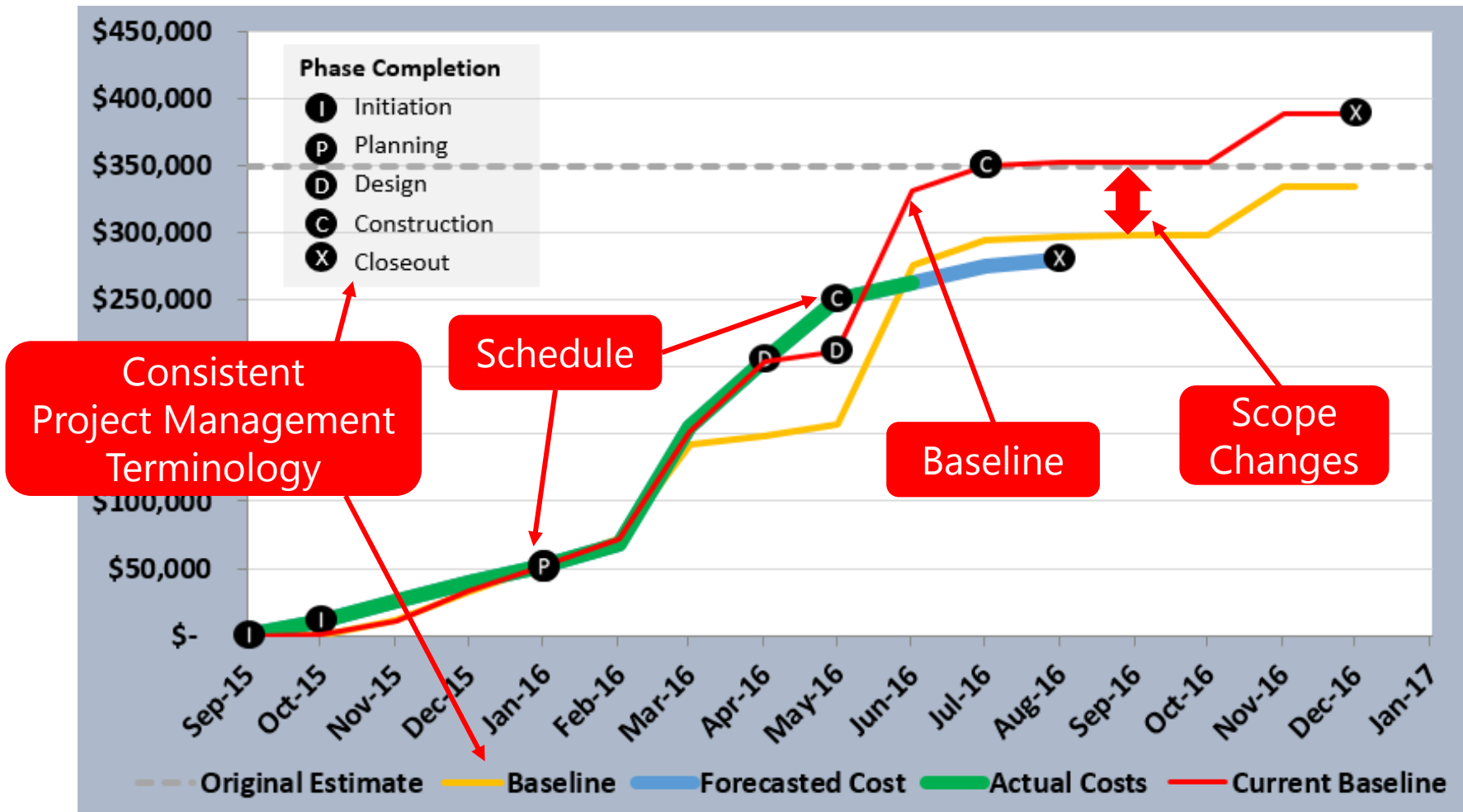
**Project Controls**



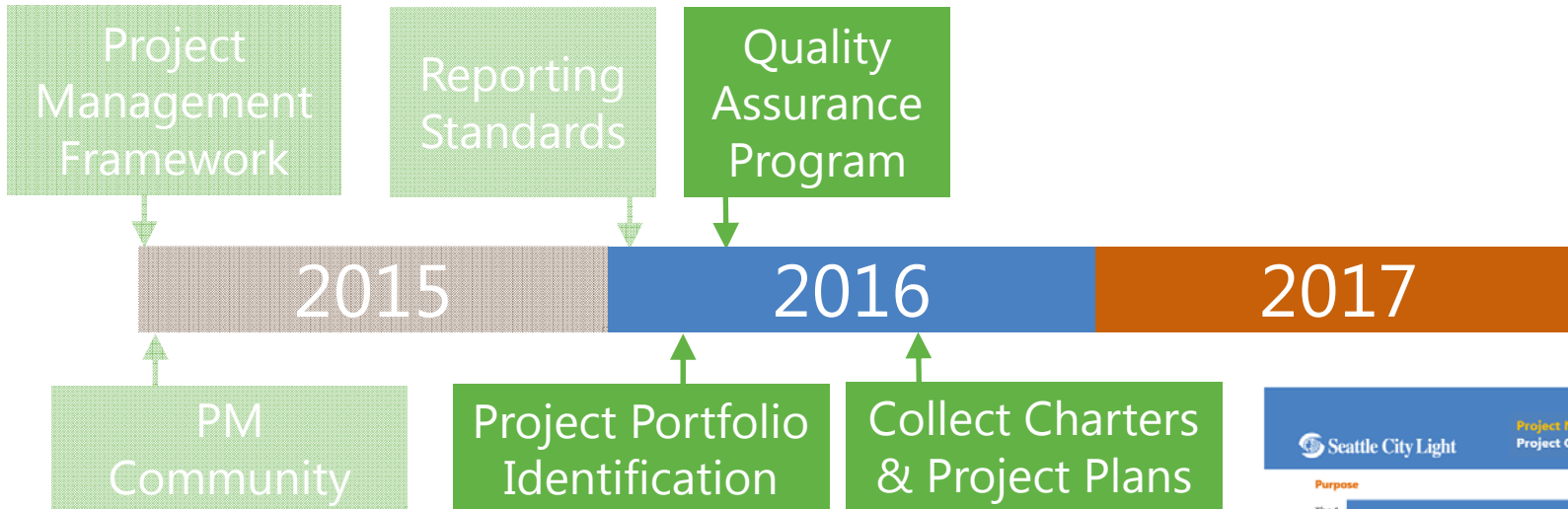
# ESTABLISH REPORTING VISION



# ESTABLISH REPORTING VISION



# ACTIONS TO ACHIEVE VISION



Seattle City Light Project Name Project Charter

**Purpose**

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apply

1. P

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Seattle City Light Project Name Project Plan Approval

This document records Project Plan approvals, and helps to ensure that consistent baseline data is captured for all projects.

1. Project Information

Project Number (s)	Project number(s)
Project Sponsor	Project Sponsor name
Project Manager	Project Manager name

2. P

What  
back:  
so th

2. Project Plan Documentation

The primary documents used to produce this project plan are listed below.

Document	Description	Location Stored

3. L

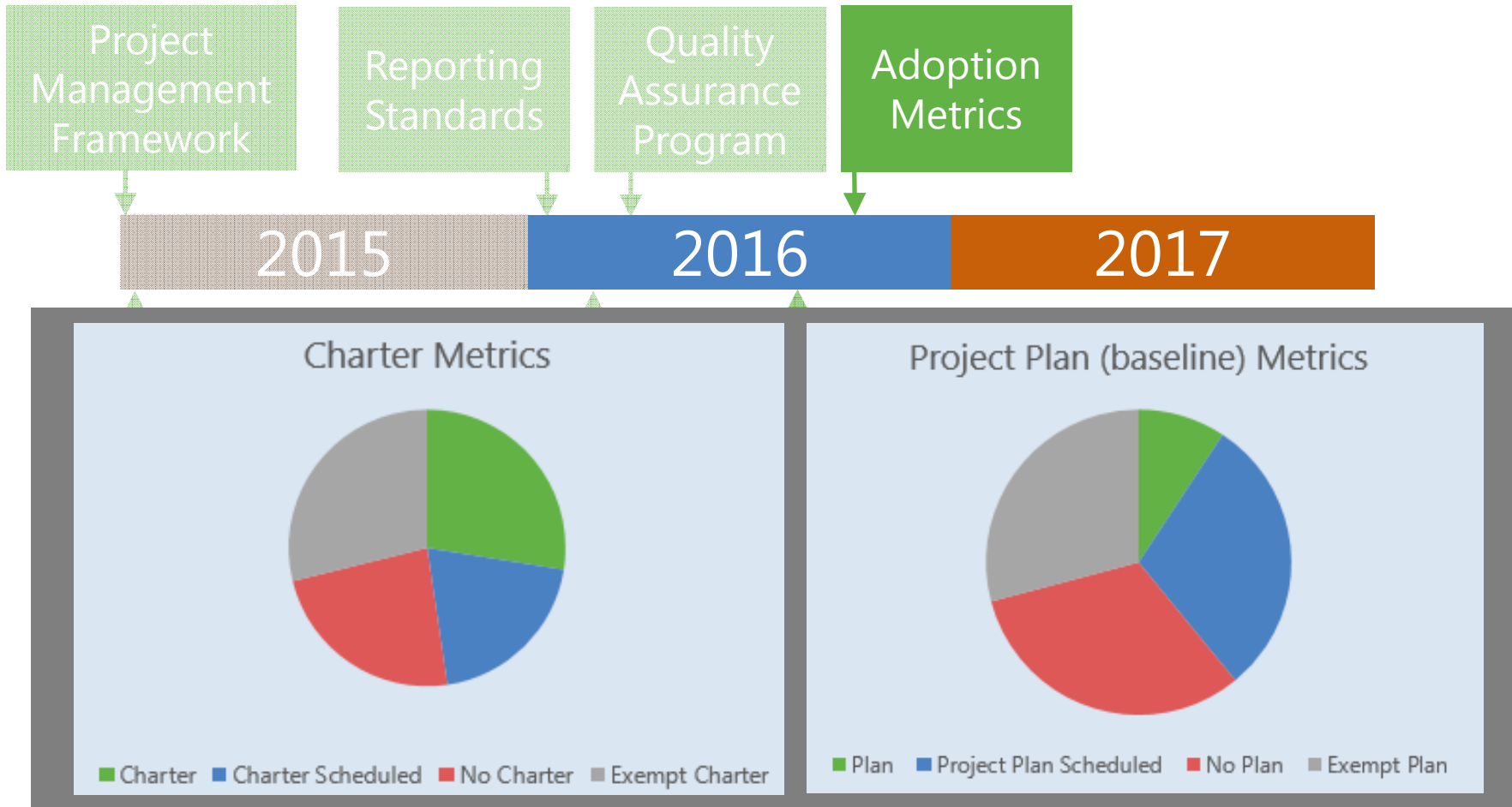
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3. Data Sources

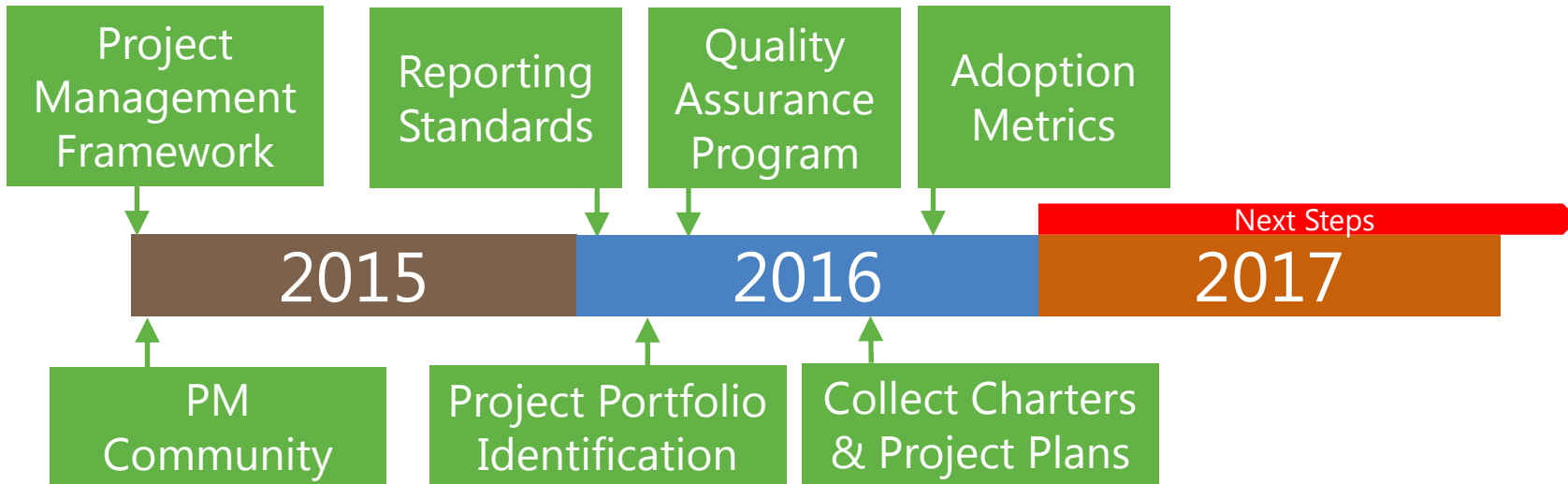
**What is the data source for collecting actual costs on the project?**  
Explanation must include precise numbers that isolate 100% of the project costs and only costs attributable to the project.

**Where are forecasted cost and schedule maintained?**  
Explanation must provide the location where monthly forecasted costs and forecasted completion dates for major milestones will be maintained.

# MEASURING PROGRESS

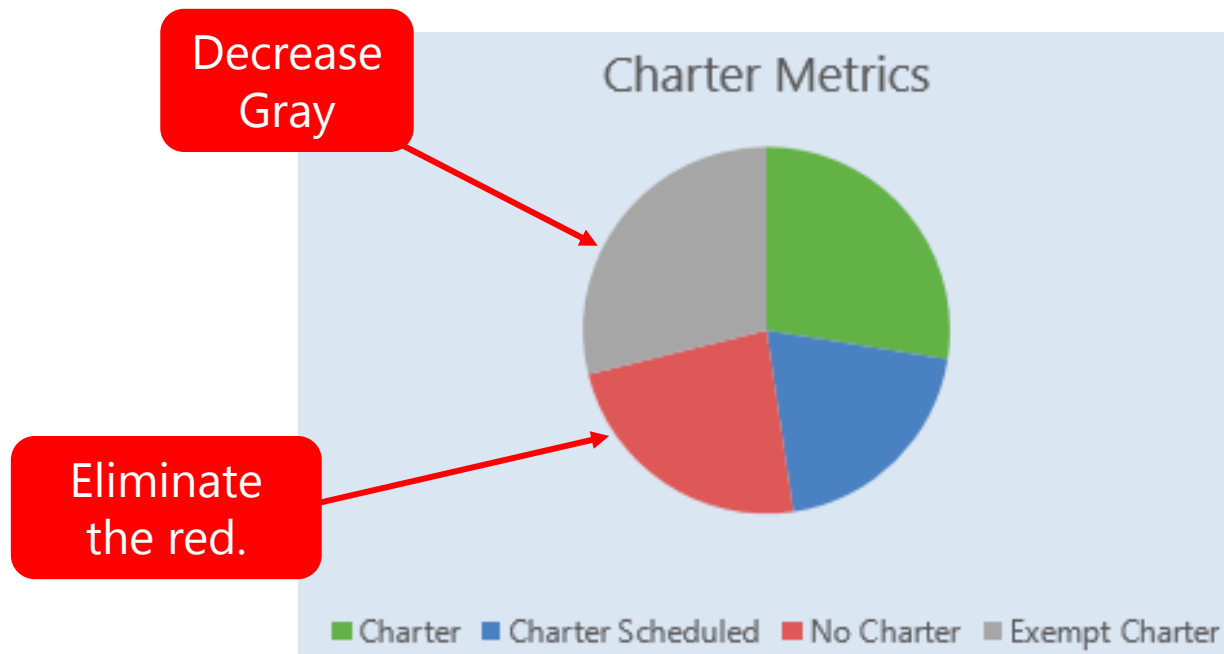


# NEXT STEPS?





# IMPROVE ADOPTION

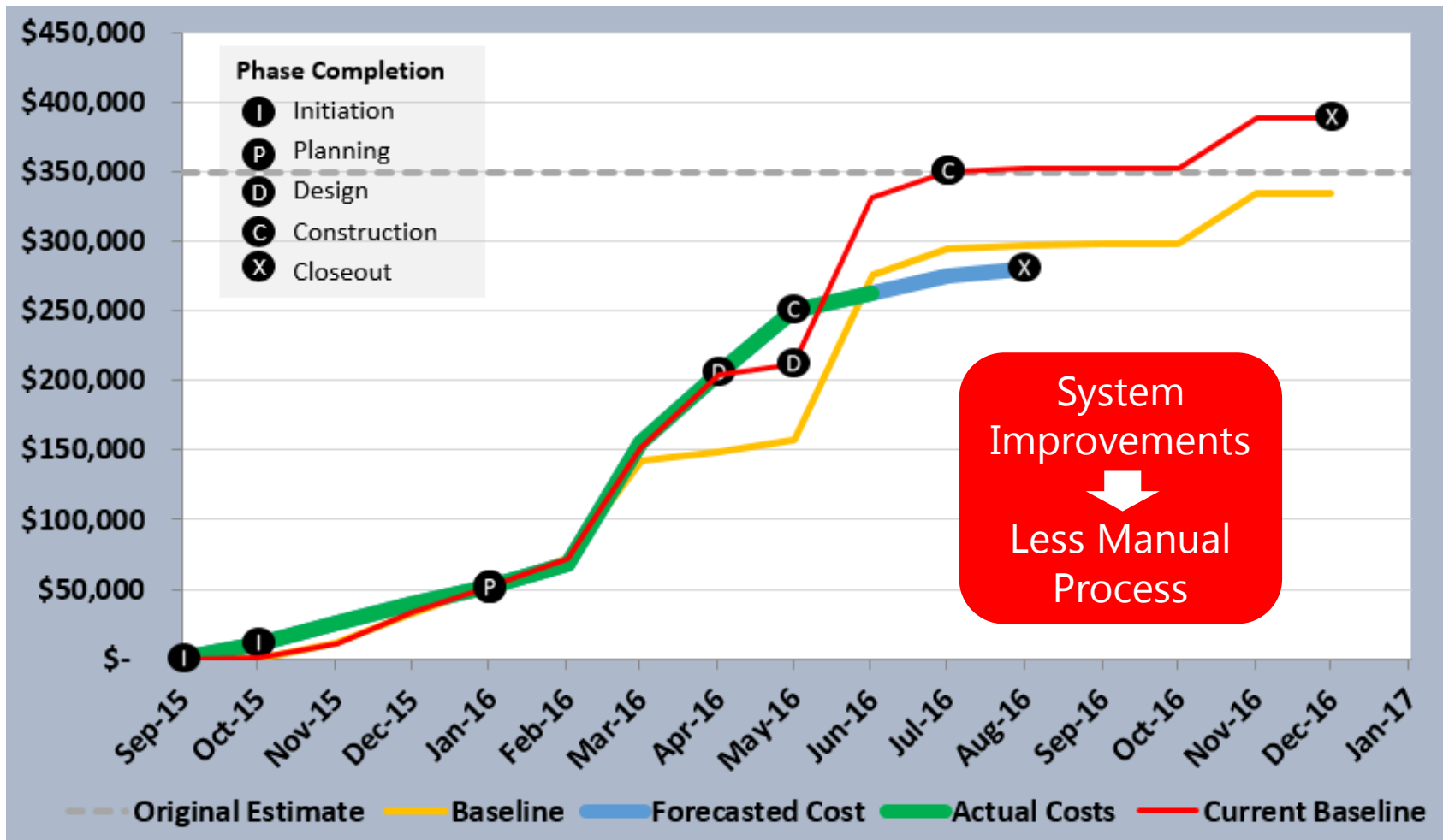


# BETTER BOTTOM-UP ESTIMATING

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# MORE EFFICIENT REPORTING

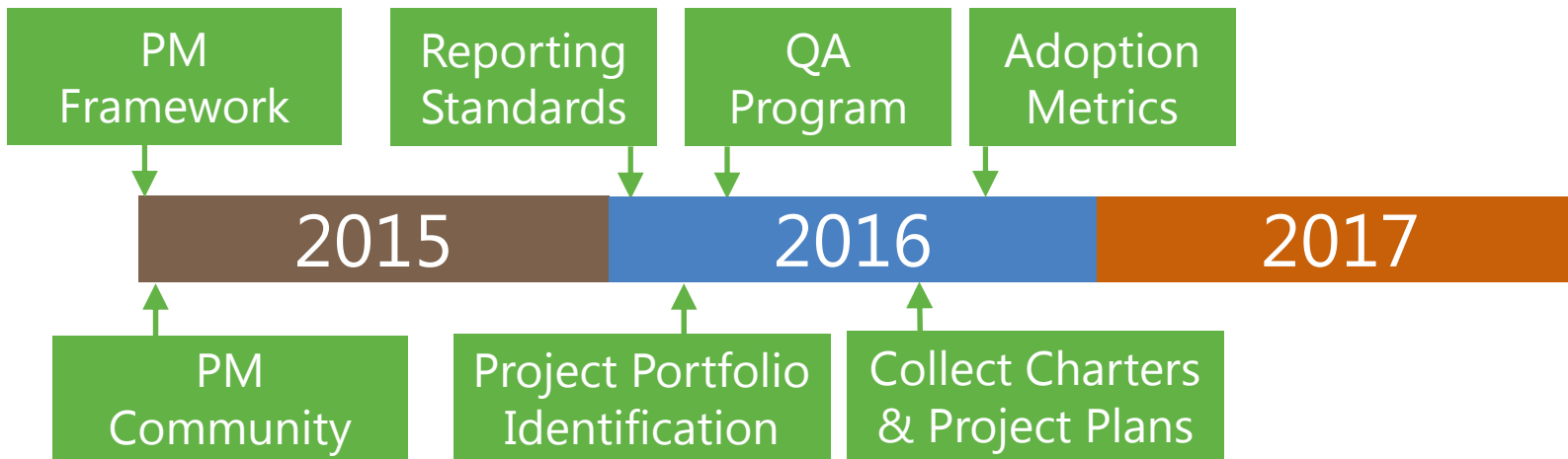


# MEASURING BENEFITS

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1. Increase efficiency of projects
2. Establish consistent data for future measures
3. Qualitative benefits
4. Project success stories

# QUESTIONS?



## Next Steps

1. Improve adoption (documentation)
2. Team based estimating (accuracy)
3. Efficient reporting (systems)