THE SCIENCE OF PLANNING A PROJECT THAT #GSD
WE BELIEVE IN THE TRANSFORMATIVE POWER OF GETTING SH*T DONE.

120VC.com
DEFINING THE PROJECT

Foster a fierce commitment to alignment and clear expectations …
PLANNING SUCCESS CRITERIA

1. Challenge – The Status Quo
2. Conflict – Question Everything
3. Critique – In Culturally Appropriate Ways

“We have to look at those things as sources of value creation rather than something to be avoided” – Ed Freeman

1. Define Future State
2. Determine Current State
3. Deliver a Roadmap

No one starts a Project because they want their organization to be the same when it’s over

*** The Ed Freeman quote is derived from his TED Talk titled “Business is About Purpose.”
PROJECT CHARTER LIFECYCLE

- **Purpose**
  - Clarity = 25%
  - Initial Project Owner Interview

- **Objectives and Benefits**
  - Clarity = 50%
  - Executive Stakeholder Commencement Mtg.

- **In Scope, Out of Scope, Approach**
  - Clarity = 75%
  - Project Team Commencement Mtg.

- **Assumptions, Potential Impediments, Constraints**
  - Clarity = 100%
  - Project Team Commencement Mtg.

- **Approval & Acceptance**
  - Alignment = 100%
  - Kick-Off
AGILE VISION & ROADMAP LIFECYCLE

Clarity = 25%

Executive Stakeholder Commencement Mtg.

Clarity = 50%

Product Team Commencement Mtg.

Clarity = 100%

Initial Product Owner Interview

Alignment = 100%

Kick-Off

Vision Statement (Objectives & Benefits)

Product Roadmap (In Scope, Out of Scope, Assumptions, Potential Impediments, Constraints)

Approval & Acceptance
WE COMMUNICATE TO LEAD
THE WBS
1. OVERVIEW

1.1. Purpose

The purpose of this project is to enable the broad use of Client Corp.’s digital assets and intellectual property by identifying and putting into place the information security measures to protect against threats and ensure secure distribution.

1.2. Objectives

- Implementation of HTTP and SMTP monitoring and reporting tools.
- Implementation of Zen as Client Corp.’s software distribution tool.
- Implementation of intrusion detection in two layers of the infrastructure: 1) network, and 2) mobile workstations.
- Implementation of BlackBox as mobile workstation firewall protection.

1.3. Benefits

- Ability to frequently and rapidly deploy updates to Client Corp.’s anti-virus protection.
- Avoidance of cost associated with the recovery of systems and intellectual property affected by a virus attack or intrusion.
- Prevention of intellectual property corruption or theft by an intruder or internal abuser.
- Prevention of workplace efficiency loss with the implementation of tools to enforce data and Internet policies.
- Ability to broadly share digital assets without risk of theft of loss.

• The Why...
  - Tie to Company Objectives/Annual Plan
  - Keep Barely Sufficient

• Bodies of work that support the Purpose
  - Expressed in non-technical business language
  - Objectives = Outline Level 2
  - Objectives have minimum of two scope items

• Specific positive results from completing Objectives
  - Clear, measurable and realized by project closure
  - Define achievable benefits - Do not market
  - Avoid benefits that can only be realized if conditions outside of the project scope are met
2. SCOPE

2.1. Approach

The project's deliverables will be planned and managed in two distinct phases. Phase I will focus on the completion of the project's objectives in N. America. Phase II will focus on the completion of the project's objectives in Europe, Asia, and S. America. This approach allows for N. America to serve as the proof of concept for the remaining regions. The project team will leverage the planning, delivery, and lessons learned from Phase I to rapidly plan and complete the project's objectives in the remaining regions.

Zen has been selected as Client Corp.'s software distribution tool. This tool will provide Client Corp. with the ability to rapidly deploy virus software and definitions. Once installed, client services will have the ability to proactively deploy virus updates to mitigate future virus threat. As Zen is a client server application there are two distinct components to its deployment: 1) a third party Zen expert has been retained to work with Systems Infrastructure to design, test, configure, and deploy the server architecture. 2) Client Services will work with Client Corp. application organizations to identify any application conflicts with the Zen client. Conflicts and their solutions will be piloted to ensure a flawless integration of the Zen client into the production environment.

After deployment of the Zen client, a manual QA of the desktop environment is necessary to ensure installation on 100% of the LAN attached workstations. A new installation policy ensuring the deployment of Zen on all new workstation requests will be in place prior to deployment kick-off.

IntruderHunt/IntruderTrap by Recount Technologies and BlackBox by DST will be employed as our intrusion detection systems. Intrusion detection is critical to ensuring our systems and intellectual property are never compromised. Recount technologies will provide a turnkey solution by installing and configuring the network appliances that host the IntruderHunt and IntruderTrap products. BlackBox will be deployed to all remote workstations and laptops. Local IT groups within Client Corp. will use Zen to deploy BlackBox over VPN to the remote and mobile users.

Internet Inspector and IM Messenger Inspector/Anti Virus bundle by Excener have been selected as Client Corp.'s HTTP and SMTP monitoring and reporting tools. These packages will provide Client Corp. with the ability to manage the appropriate use of the Internet and email. This will not only provide the ability to reclaim the loss in workspace efficiency, but prevent the potential compromise of our environment. By limiting Internet and email use to company business, we are decreasing the risk of a viral infection or being attached by a hacker monitoring Internet activity. These solutions are turnkey network appliances that will be deployed without any impact to the end-users.

- Describe how the project team will execute
- Executives aren’t SME’s – Keep it simple
- Describe how and in what order the Scope and Objectives will be executed – How the pieces fit together
- Illustrate how the delivery of scope progressively meets the objectives
- Use local terminology – phases, Gates, SDLC, etc...
2.2. In Scope

Establishment of the Security Services Support Policies and Procedures
- Establishment of Zen software distribution, inventory, and remote control policies.
- Establishment of IceBox and BlackBox policies and procedures.

Implementation of HTTP and SMTP monitoring and reporting tools
- Procurement of hardware for HTTP and SMTP intrusion detection.
- Deployment of network intrusion detection (Internet Inspector) and mobile workstation intrusion detection (Messenger Inspector).

Implementation of Zen as Client Corp.'s software distribution tool
- Establishment of Zen requirements and documentation of environment design.
- Building of Zen test environment.
- Piloting of Zen in deployment within Client Corp. IT only.
- Creation and certification of standard workstation image.
- Procurement of hardware and software for Zen deployment.
- Set up and configuration of Zen infrastructure and deployment of Zen in Los Angeles, New York, Miami, Toronto, and Dallas.

Implementation of intrusion detection in two layers of the infrastructure: 1) network, and 2) mobile workstations
- Procurement of hardware and software for deployment of intrusion detection/HTTP & SMTP monitoring.
- Deployment of Intruder Hunt and Intruder/Trap in Southern California and remote locations.

Implementation of BlackBox as mobile workstation firewall protection
- Implementation of IceBox.
- Preparation for BlackBox deployment, pilot, and full deployment.

2.3. Out of Scope

- Standalone offices not attached to the WAN
- Remote dial up workstations.
- Macintosh workstations.

- Things that must be completed to complete each objective
- Each scope item must tie-back to one objective
- Each scope item will result in one or more Scope Items in the work plan – Meaningful status
- Each scope item must represent several tasks
- If it can be assigned to a contributor, it’s not scope

- Items that stakeholders might assume are included but are not
- Items that were discussed and decided against
- Items that traditionally go together – peanut butter &...
- Locations or departments that were intentionally excluded
2.4. Assumptions

- The mobile users will make themselves available to support the Zen and BlackBox client rollout schedule.
- Mobile users are all using company supplied standardized equipment.
- The deployment of Zen over the network will not slow or bring down the LAN or WAN by overloading the circuits.
- The proposed solutions will integrate with the software standards currently deployed in the environment.
- The Zen software distribution tool once implemented will be capable of deploying BlackBox mobile workstation protection over VPN.

2.5. Constraints

- No changes can be made to the environment during monthly, quarterly, and yearly financial close.
- No changes can be made to the environment during scheduled working hours.
- Zen will be deployed as the enterprise software distribution tool.
- IntruderHunt/IntruderTrap by Account Technologies and BlackBox by JST will be employed as our intrusion detection systems.
- Internet Inspector and IM Messenger Inspector/Anti-virus bundle by Ecxerox will be employed as our HTTP and SMTP monitoring and reporting tool.
- BlackBox will be deployed as our workstation firewall tool.

2.6. Potential Impediments

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<thead>
<tr>
<th>Impediment</th>
<th>Mitigation</th>
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<tbody>
<tr>
<td>Limited internal security product deployment and management expertise (single point of failure)</td>
<td>External resources with security product and deployment management experience will be procured to assist with project planning and key stages of deployment.</td>
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<tr>
<td>Mobile user variant schedules and availability</td>
<td>The deployment plan will be structured to accommodate the schedules of mobile users by allowing multiple appointment times and equipment exchange opportunities.</td>
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<tr>
<td>Mobile users with personal equipment utilizing nonstandard software</td>
<td>A separate initiative will institute a new policy requiring that only Client Corp. equipment will be authorized to connect to the network.</td>
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<tr>
<td>LAN segment downtime due to increased traffic related to remote software distribution</td>
<td>The implementation activities will be executed during non-peak hours, and resources will be on-hand to address issues immediately as they arise.</td>
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- Unsubstantiated beliefs that the Approach is based on
- Avoid assumptions about Executive decisions
- Conditions that cannot be changed and must be worked with
- You don’t have a carte blanche budget
- The software or hardware must meet client “standards”
- Assumptions that, if invalid, could affect the cost, schedule, or scope
- Mitigation strategies are reflected in the work plan
  - No mitigation? It’s a constraint!
  - No good can come from marketing a constraint as a risk
  - BCHB
PLANNING THE PROJECT

Take time to plan, or plan to fail ...
LEADERSHIP IS... ACTIVE LISTENING

ADOPT THE ACTIVE LISTENING MINDSET

• Listen without deciding.
• Avoid listening autobiographically.
• Give undivided attention.
• Use neutral tone of voice.
• Maintain eye contact and a relaxed posture.

QUESTIONING

• Ask open-ended questions.
• Go through the doors they open up.

SUMMARIZING

• Periodically summarize key themes.
• Summarize and get closure.

REFLECTING

• Restate ideas and facts to show understanding.
• Remain impartial – don’t agree or disagree.

LEADERSHIP IS A FIERCE COMMITMENT TO ALIGNMENT AND CLEAR EXPECTATIONS

CLARIFYING

• Ask powerful questions, seek deep clarity & understanding
  • Bring unclear points into focus.
  • Ensure an accurate understanding.

EMPATHIZING

• Suspend judgment.
• Understand and identify with emotions.
• Find out what YOU are missing.
REDIRECTING ENERGY

**Center (Recalibrate)**
- **Stop** – Don’t react, take a deep breath.
- **Buy-time** – Ask them to “say more.”
- **Reflect** – Mentally ask “what do I really want?”
- **Answer** – To be a successful leader!

**Connect**
- Active Listen & **Empathize** accurately
- **Disarming** – Find something being said to agree with

**Redirect**
- Accurately **paraphrase** their point
- Let them know you “**get it**”
- Ask **permission** to put it in the “parking lot”
- Bring the group back on topic with a “**reframe**”
WORK PLAN STEP 1
GATHER THE PROJECT DETAILS

Work Plan Step 1 Rules of Engagement
1. Invite necessary SME’s Only (keep groups small)
2. SME’s Define the Tasks

Define the Following Details for Each Task
1. Task Definition (must have a verb)
2. Effort in Hours (no more than 12 hrs. per task)
3. Predecessor / Successor relationships
4. Confirm Task Owner (ideally the SME that defined the task)

The Secret Formula: Develop a conceptual understanding of each task and it’s duration ...
Work Plan Step 2 Rules of Engagement

1. Invite only the SME’s that defined the work (keep groups small)
2. The draft Work Plan was built using the half time model to determine task durations

Vet the Following Details for Each Task

1. Task Definition (must have a verb)
2. Duration in Days (no more than 3 days per task)
3. Predecessor / Successor relationships
4. Confirm Task Owner (ideally the SME that defined the task)

The Secret Formula: The Sanity Check Identifies missing tasks and ensures “Good Commitments”...
Work Plan Step 1 Rules of Engagement

1. Invite necessary SME’s & their Functional Managers. (keep groups small)

2. Functional Managers Define the Project Schedule

Review the Following Details for Each Task

1. Task Definition (must have a verb)

2. Duration in Days (no more than 3 days per task)

3. Predecessor / Successor relationships

4. Confirm Task Owner (ideally the SME that defined the task)

The Secret Formula: Develop a conceptual understanding of each task’s scheduling constraints...
RESOURCES

• Email me with questions | jason@120vc.com – Connect w/ me on LinkedIn

• Download “The Irreverent Guide to Project Management, An Agile Approach to Enterprise Project Management” from 120VC.COM at no cost with coupon code: PLANNING-BOOK

• Schedule me to deliver a #GSD Talk for your Team – Free!

• Check out upcoming 120VC events & our Transformational Leadership Network on 120VC.com

• Save $1,000 on our 14-week Transformational Leadership Program starting 5/18/22 | Earn 47 PDU’s and become an expert in #GSD | coupon code: PLANNING-TLP