

Closing Reporting Projects

Golden Horseshoe SAS Users Group

October 25, 2013



ArcelorMittal

Lesley Harschnitz
lesley.harschnitz@arcelormittal.com

Overview

- Introduction
- Planning for Closure
- Developing towards Closure
- Driving for Closure
- Summary



Introduction

- Objectives:
 - Share a structured approach for closing reporting projects.
 - Provide some tips based on lessons learned over a number of reporting projects.
- Basis for talk:
 - Expectation is that we are working within a structured project methodology.
 - Most of this is from the view of the project manager.
 - We are working towards a positive result – project closed on time, within budget, happy client.

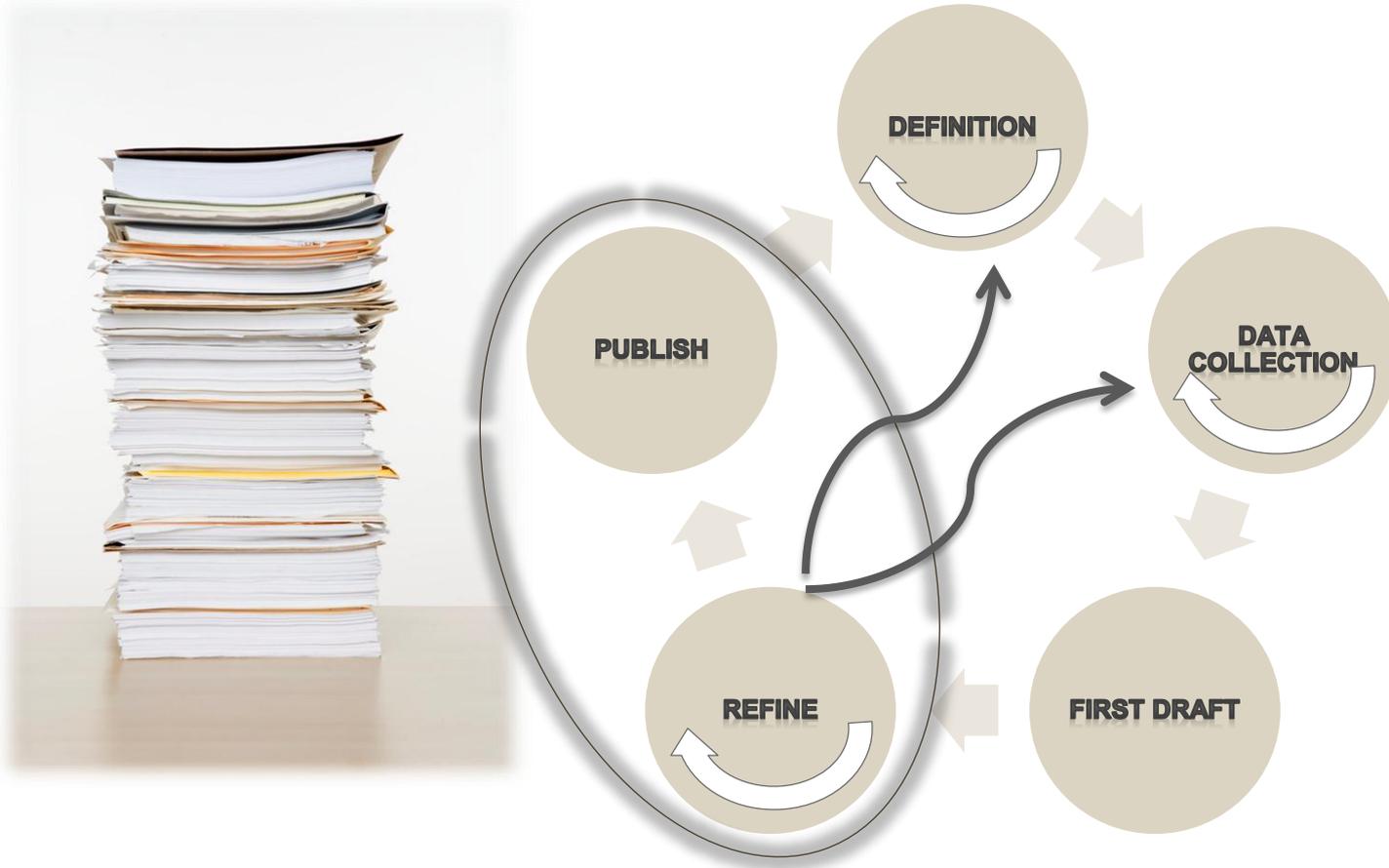
Reporting Project

- A defined set of resources (people, tools) producing a defined set of reports (scope) within a certain time frame (schedule) consuming a certain amount of money (budget).
- Common project milestones:
 - Initiation (sets scope, schedule, resources, budget)
 - Project Plan complete
 - Requirements complete- final scope
 - Work - result in Deliverables - status
 - Deliverables complete
 - Client acceptance
 - Project Close





Creating a Report



Planning for Closure



Have the end in clear view from the beginning

Building Closure using the Project Plan

- Clearly identify a specific set of deliverables that include:
 - Report content, format, delivery
 - Criteria for complete- when is it done.
 - Who is responsible to accept the deliverables
 - What business value they deliver
 - Have a sign-off milestone on scope as early as reasonable
- Clearly identify a change management process and governance
- Allow time and tasks for refining scope
- Be realistic in estimating resources and setting the schedule
- Ensure that you have client participation for testing/feedback
- Ensure that you have an escalation mechanism

Projects are closed in a positive manner when the Client accepts the results.
A good project plan will ensure that there is common understanding
as to what results will be produced.



Expect Iteration



- First view of a report will trigger ideas
- Technology changes or availability
- Data quality
- Data availability
- Automation constraints
- Undiscovered requirements
- Unarticulated assumptions and constraints
- Multiple clients, multiple views

Reports are very difficult to define precisely.
Expecting change allows you to accept the necessity,
make new plans, and move on with minimal impact to the overall work.

Develop Relationships

- Understand the business benefits that this project is expected to produce
- Maintain a good working relationship with the client
- Communicate often and accurately
- Involve the client in overcoming issues



Good working relationships allow both parties to reach common ground easily.

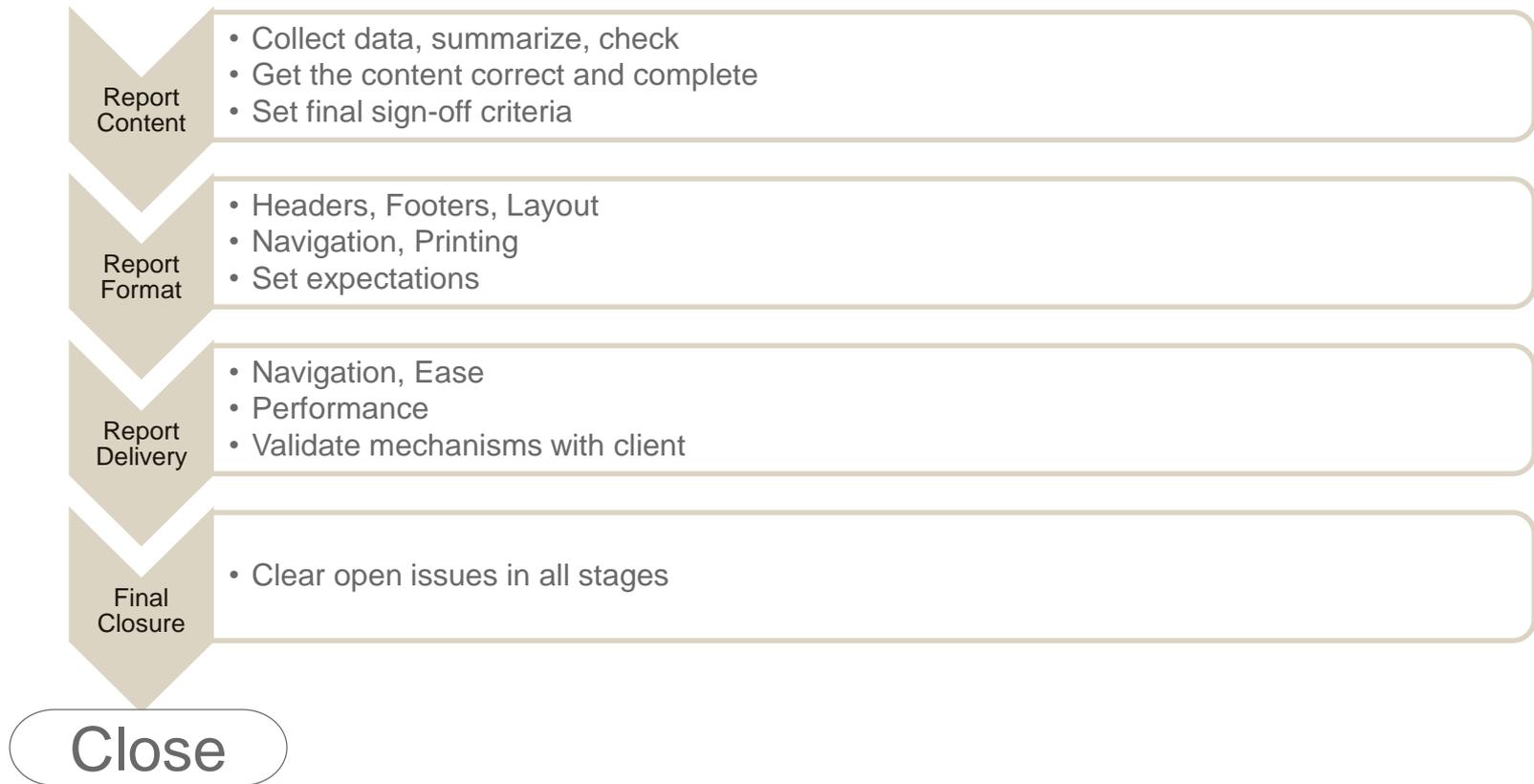


Developing toward Closure



Staged development promotes clean deliverables and better closure.

Development Process



Take the planned time for a report and devote 50% to content, 30% to format and 20% to delivery



Setting Expectations during Development

- Profile data and review- it's all about data
- Create a specific acceptance list as soon as data finalized
- Educate clients on the development process.
- Set up and use feedback sessions with the client
- Be ready to pause and regroup
- Understand and be ready to explain balance between what is delivered and maintainability.
- Use resource tracking and discuss
- Clearly identify enhancement requests, but take advantage of “low hanging fruit”
- Use the change process and maintain a clear list of deliverables – trade work
- Set up and use regular status meetings, reports, and open issues lists



The Client should always have a good view of what is possible, what is not, deliverable status, and any open issues.



Driving for Closure



Reaching a final agreement on project closure is more than a check list.

Identifying Closure Blocks

Data Issues - incomplete reports

- Data not available
- Data not connected
- Data quality issues
- Backfill issues

Architecture Issues - performance, ease of use

- Performance, reliability, availability, access
- Platform
- Feature creep

Resource Availability - response time

- Dedicated project resources
- Quick response to change requests
- New enhancements

During the progress of a project various issues may remain open.

Overcoming Blocks

Data Issues

- Identify, document issue
- Either plan correction and timeline or document acceptance

Architecture Issues

- Identify, document issue or need
- Use change process to determine in/out
- Plan future work if needed

Resource Availability

- Understand the comfort level
- Use closure mechanisms

Blocks are most easily resolved when documentation is complete and relationships are good.

Closure Mechanisms

- Revert back to original scope and closure criteria
- Make sure you have a clear view of open issues and the opportunities to resolve them
- Use “low hanging fruit” work done as leverage
- If you have incomplete work, or unavailable infrastructure, negotiate a follow up project
- Shift enhancement requests to regular internal maintenance
- Use your escalation process (last choice)

When you have reached an understanding on remaining work, document it.

Summary

- Planning for Success
- Developing towards Closure
- Driving for Closure

Closure starts the day the project starts.

Questions, Contact



- Lesley Harschnitz
lesley.harschnitz@arcelormittal.com