



Basics of Security Project Management

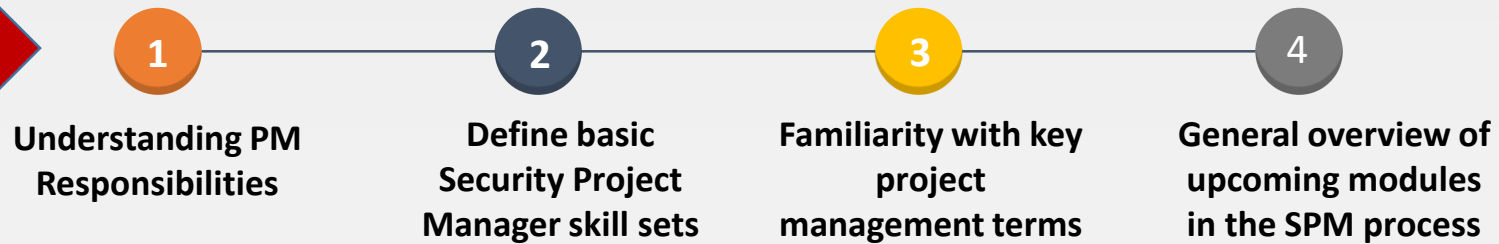


Overview of Security Project Management

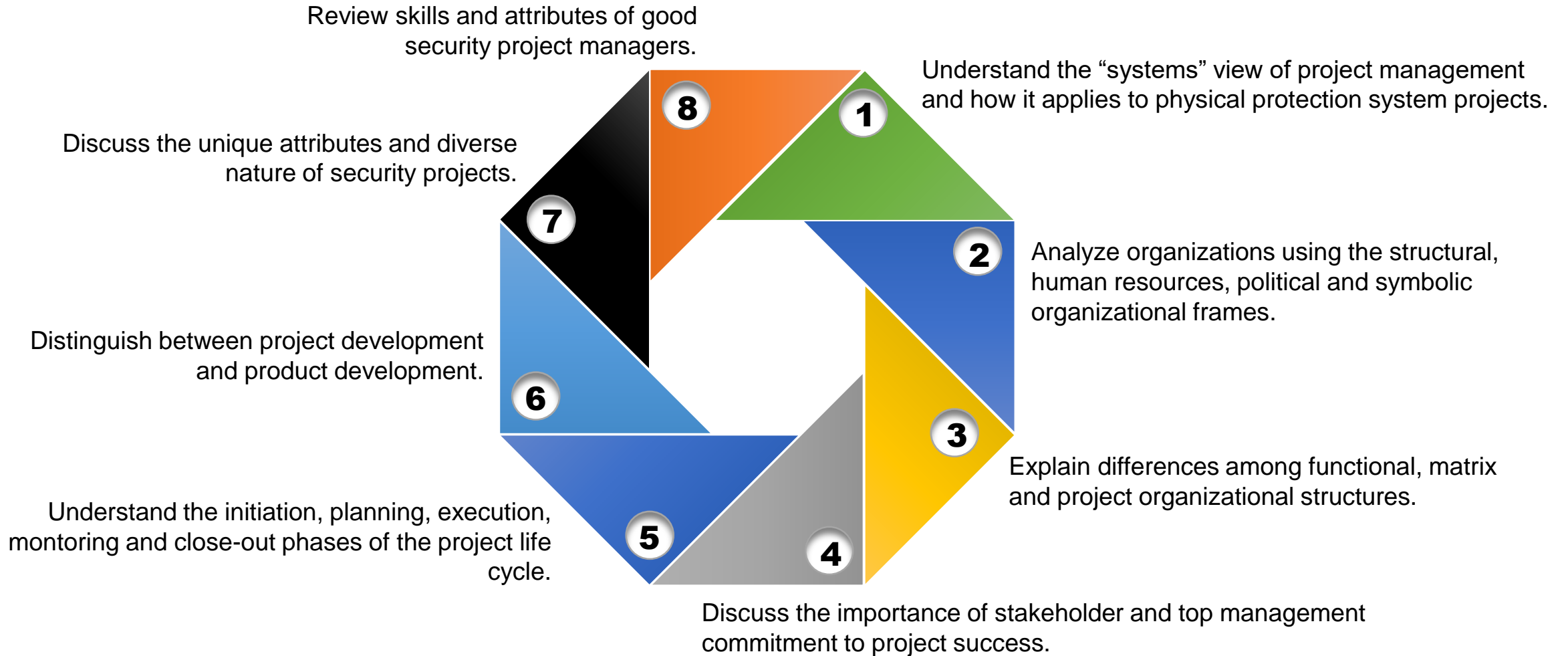
Part II to Planning,
Organizing, & Controlling
Resources during a Project



GOAL

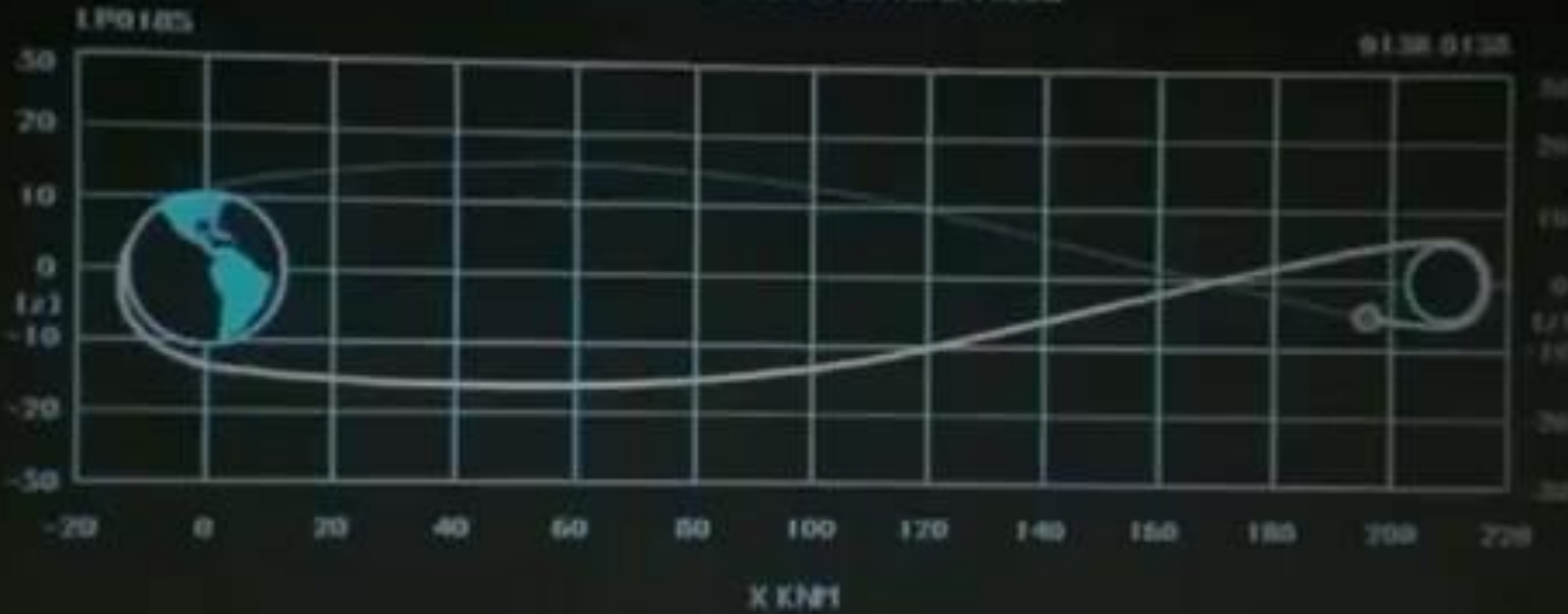


Learning Objectives



EARTH MOON TRANSIT

DISTANCE X 1000 NAUTICAL MILES



02

51

MOVIECLIPS.COM

Definition of a Project



What is a Project?

Activities over a specific period of time for the purpose of achieving a defined goal.

- Has a specific “product” – a system
- Requires certain resources
- Includes defined start and completion dates
- Includes budget constraints



Key Project Objectives

- Maintain required timing
- Meet expected project deliverables
- Schedule invoicing & payments
- Training & operation requirements



What is Project Management?

AMAP: The **ACTION** of **MANAGING** the **ACTIVITIES** of **PROJECTS** to successful completion through proven processes.

- ✓ Scope of Work (SOW)
- ✓ Specified time line (Gantt Charts)
- ✓ Cost Schedule: Budget & Estimates

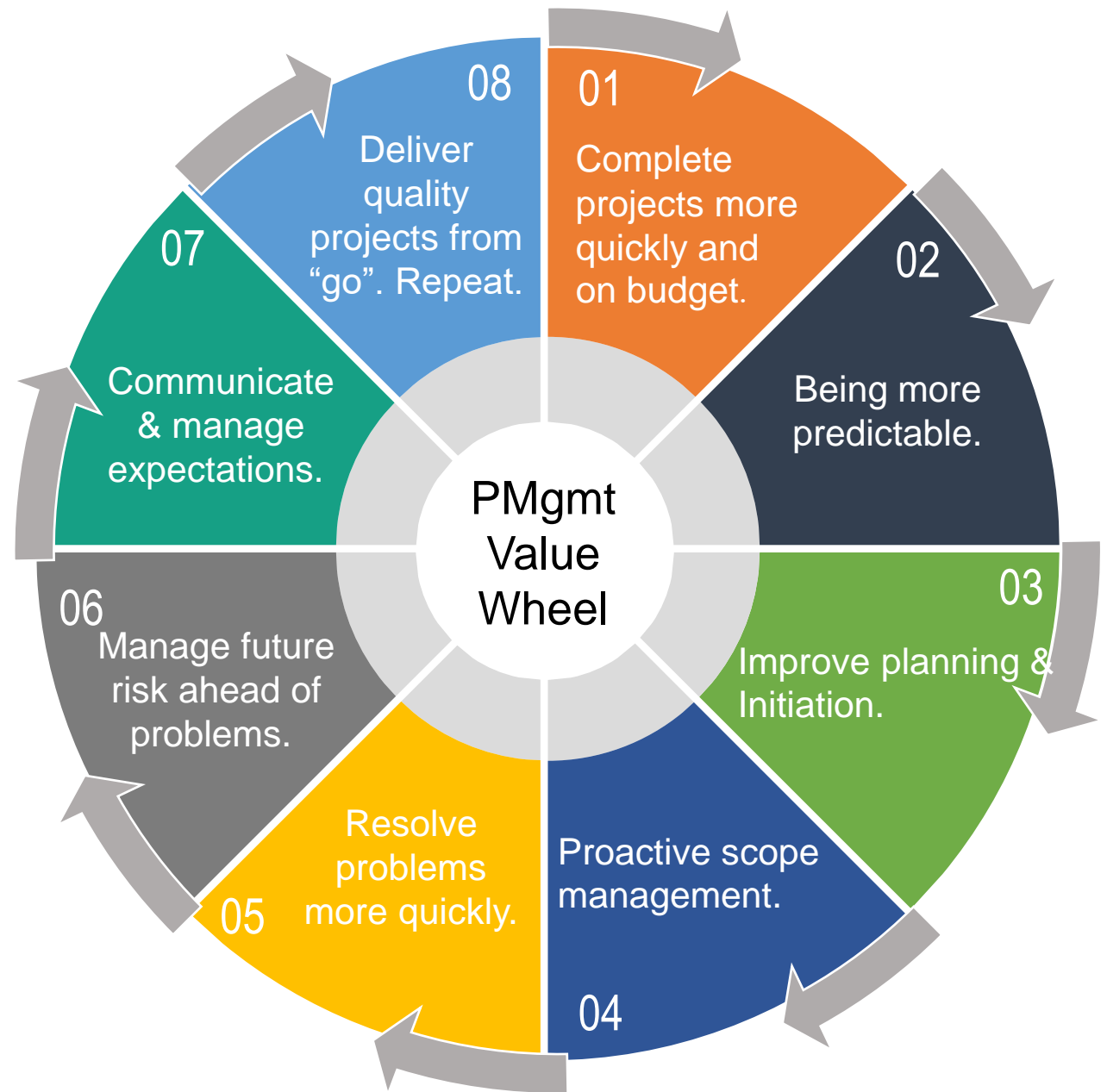
PROPER PROFESSIONAL PROJECT MANAGEMENT WILL PRODUCE
POSITIVE UNIQUE RESULTS

The Project Management Quality Triangle



The Value of Project Management

- Improve schedule & financial management.
- Increase efficiencies.
- Data, metrics & experience for better decision making.
- Improve work environment & team experience.

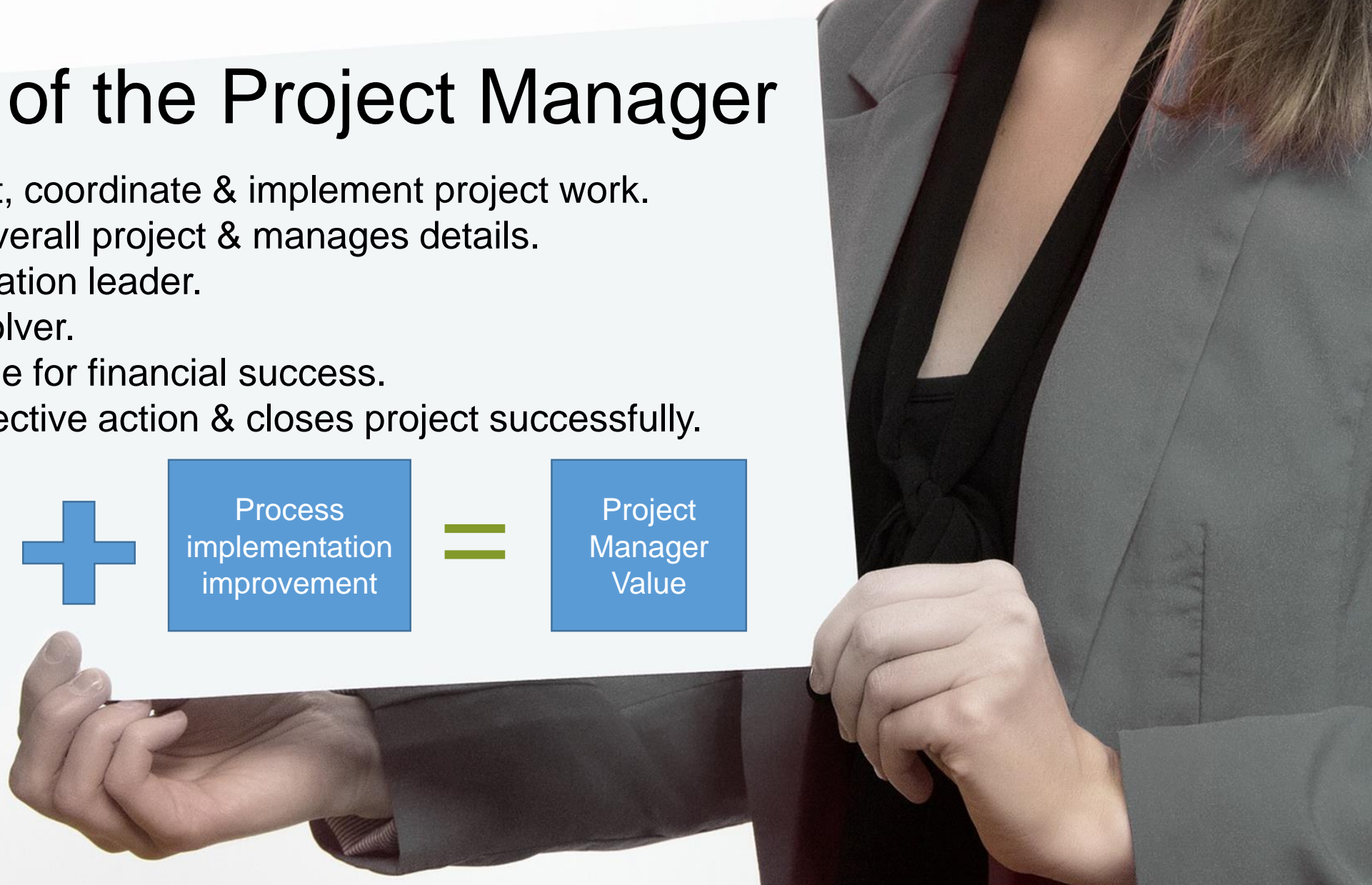


The **Practice** of Project Management

- ✓ Delivers better results
- ✓ Reduces / manages costs
- ✓ Increase efficiencies
- ✓ Improves customer & stakeholder satisfaction
- ✓ Teaches others
- ✓ Provides a competitive advantage

The **Role** of the Project Manager

- ✓ Plan, direct, coordinate & implement project work.
- ✓ Monitors overall project & manages details.
- ✓ Communication leader.
- ✓ Problem solver.
- ✓ Responsible for financial success.
- ✓ Takes corrective action & closes project successfully.



Benefits of Project Management

- ✓ *Defines clear expectations*
- ✓ *Provides faster execution*
- ✓ *Sets & manages priorities*
- ✓ *Improves customer satisfaction*
- ✓ *Manages scope & scope creep*
- ✓ *Decreases issues & delays*
- ✓ *Makes better decisions*

Process to Value

- ✓ Understand customer/stakeholder priorities.
- ✓ Identify project goals and objectives.
- ✓ Qualify: Cost of Time, Money & Effort
- ✓ Implement solutions efficiently.
- ✓ Maintain open communications.
- ✓ Document progress regularly.
- ✓ Close projects completely.





“This project is extremely important, but it has no budget, no guidelines, no support staff and it’s due tomorrow morning. At last, here’s your chance to really impress everyone!”

Basic Security Project Planning Skills:



- Schedules
- Resource allocation
 - Internal
 - External
 - Subcontractors
- Site familiarity
- Permits & additional insurance
- PO/contract requirements
- Budget
- Submittals
- As built drawings
- Sign-off / approvals

Successful Project



Attributes

- Clear statement of objectives
- Defined scope of work
- Time & scheduled managed
- No budget overruns
- System commissioned & approved
- End users trained
- System up and running
- Project closed out

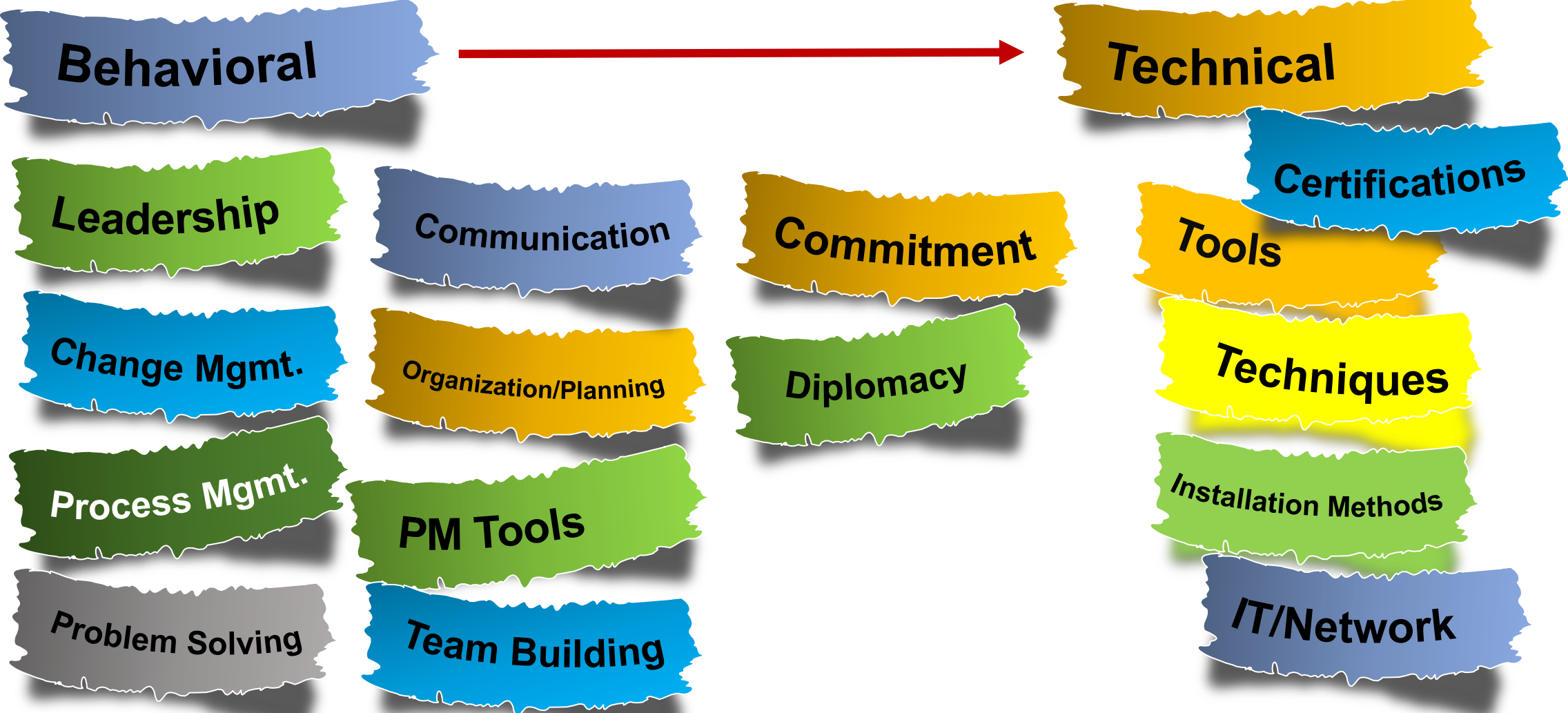
Client's Expectation of Security Project Managers

The ability to manage and coordinate:

- People & project resources
- Time & schedule
- Financial
- Risk
- Scope of Work (SOW)
- Communications
- Change orders
- Commissioning
- Testing
- Completion of punch list items
- Commissioning
- Training & Turn-Over
- Manuals, Warranty statements

To be the best: Project, Project, Project...

Skills Needed as a Security Project Manager



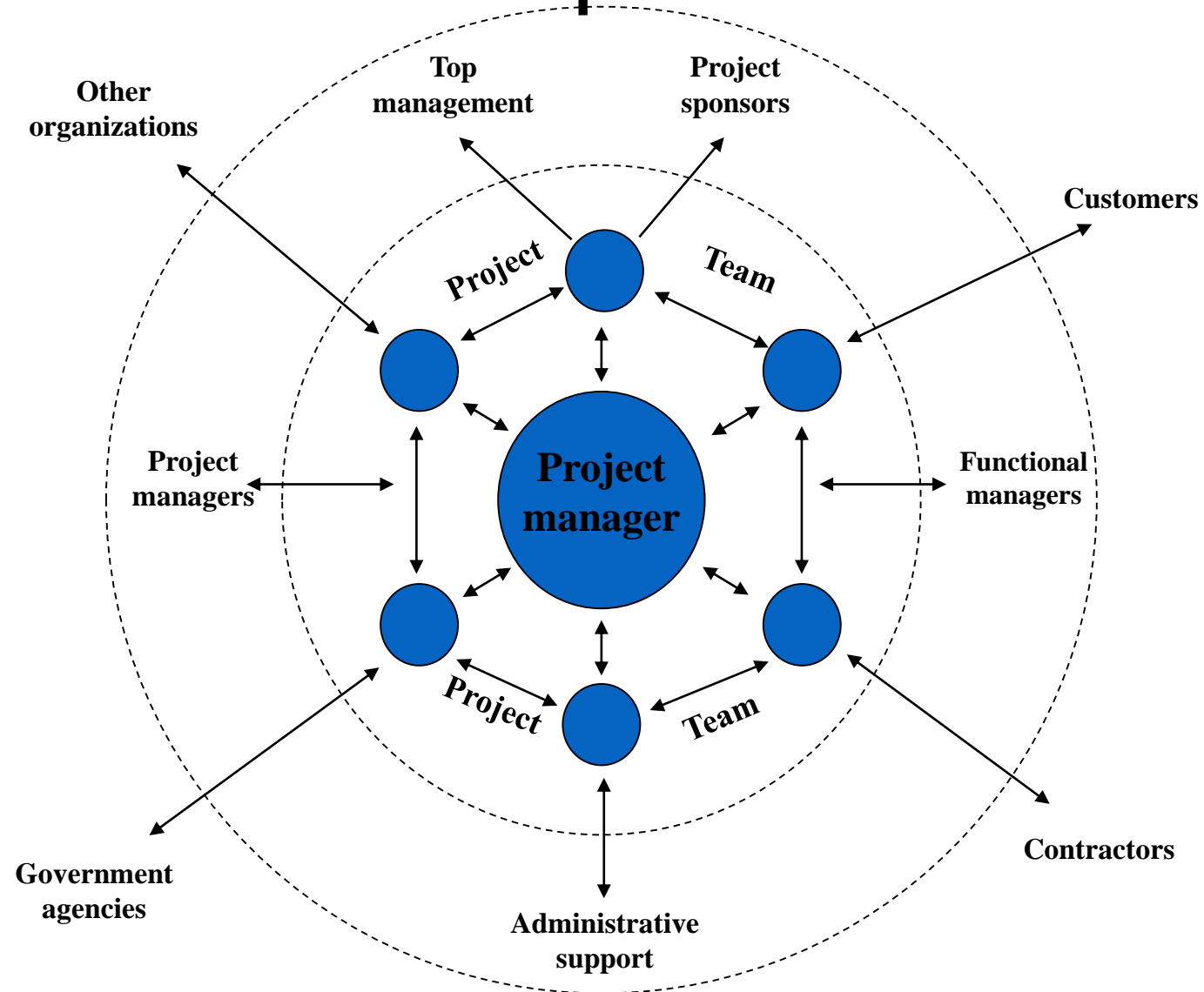
What is the most important criterion when an organization chooses a project-selection model?

1. Organizational fit
2. Flexibility
3. Cost
4. Capability

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Network of Relationships



Commonly Traded Organizational Currencies

Inspiration-related currencies

Vision	Being involved in a task that has larger significance for the unit, organization, customer, or society.
Excellence	Having a chance to do important things really well.
Ethical correctness	Doing what is “right” by a higher standard than efficiency.

Relationship-related currencies

Acceptance	Providing closeness and friendship.
Personal support	Giving personal and emotional backing.
Understanding	Listening to others’ concerns and issues.

Personal-related currencies

Challenge/learning	Sharing tasks that increase skills and abilities.
Ownership/involvement	Letting others have ownership and influence.
Gratitude	Expressing appreciation.

Source: Adapted from A. R. Cohen, and David L. Bradford, *Influence without Authority* (New York: John Wiley and sons, 1990). Reprinted by permission of John Wiley & Sons, Inc.

Commonly Traded Organizational Currencies

Task-related currencies

Resources	Lending or giving money, budget increases, personnel, etc.
Assistance	Helping with existing projects or undertaking unwanted tasks.
Cooperation	Giving task support, providing quicker response time, or aiding implementation.
Information	Providing organizational as well as technical knowledge.

Position-related currencies

Advancement	Giving a task or assignment that can result in promotion.
Recognition	Acknowledging effort, accomplishments, or abilities.
Visibility	Providing a chance to be known by higher-ups or significant others in the organization.
Network/contacts	Providing opportunities for linking with others.

*Source: Adapted from A. R. Cohen, and David L. Bradford, *Influence without Authority* (New York: John Wiley and sons, 1990). Reprinted by permission of John Wiley & Sons, Inc.*

Basic **Security** Project Management Duties

To insure the consistent completion of projects with:

- ✓ the highest positive impact for your company
- ✓ the greatest quality and financial integrity for your client

WILL REQUIRE the PM to:

- Participate during the Sales Process
- Establish core process/procedures in your Company
- Project Plan: imagine devices from furthest point in
- Establish uniformity & consistency with engineered drawings
- Have teams pre-fabricate to the “Nth” degree
- Communicate with & educate all project resources
- Plan ahead, review, analyze, re-align
- General understanding of building and fire codes

Project Objectives – Key Points

- ✓ Clearly understand scope requirements
- ✓ Job site familiarity
- ✓ Safety concerns, requirements
- ✓ Environmental considerations
- ✓ Quality control plan
- ✓ Obtain required resources
- ✓ Meet code requirements
- ✓ Understand technologies to implement



Application of Basic Security Project Management Skills

Job Initiation, Planning & Familiarity:

- Job Kick-Off
- Schedule creation
- Resource allocation
- Scope Review
- Budget Review
- Engineering Review
- Procurement
- Pre-Fabrication
- Site Familiarity
- Permits, certifications, etc.

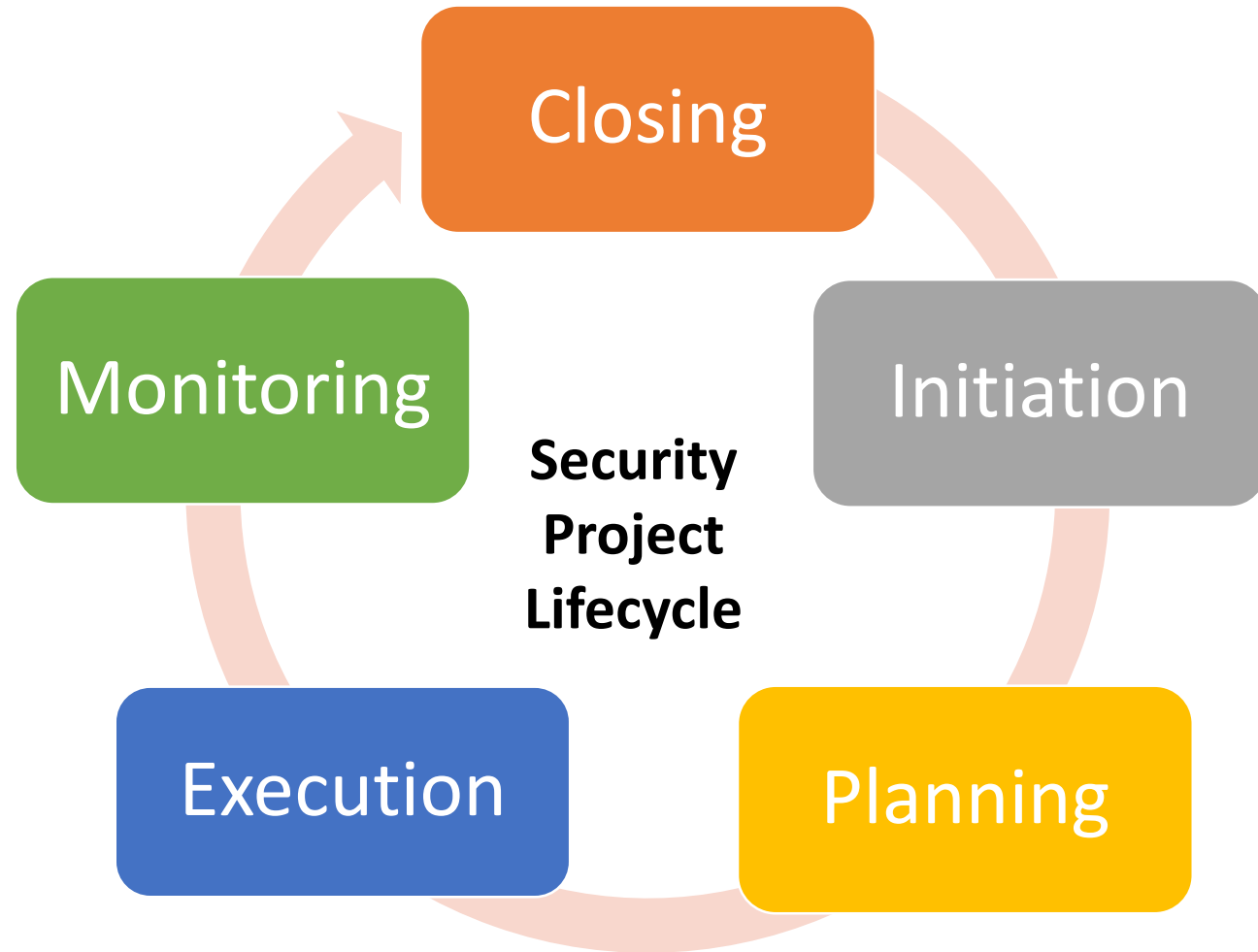
Application of Basic Security Project Management Skills

Coordination, Review & Authorization, Risk Management:

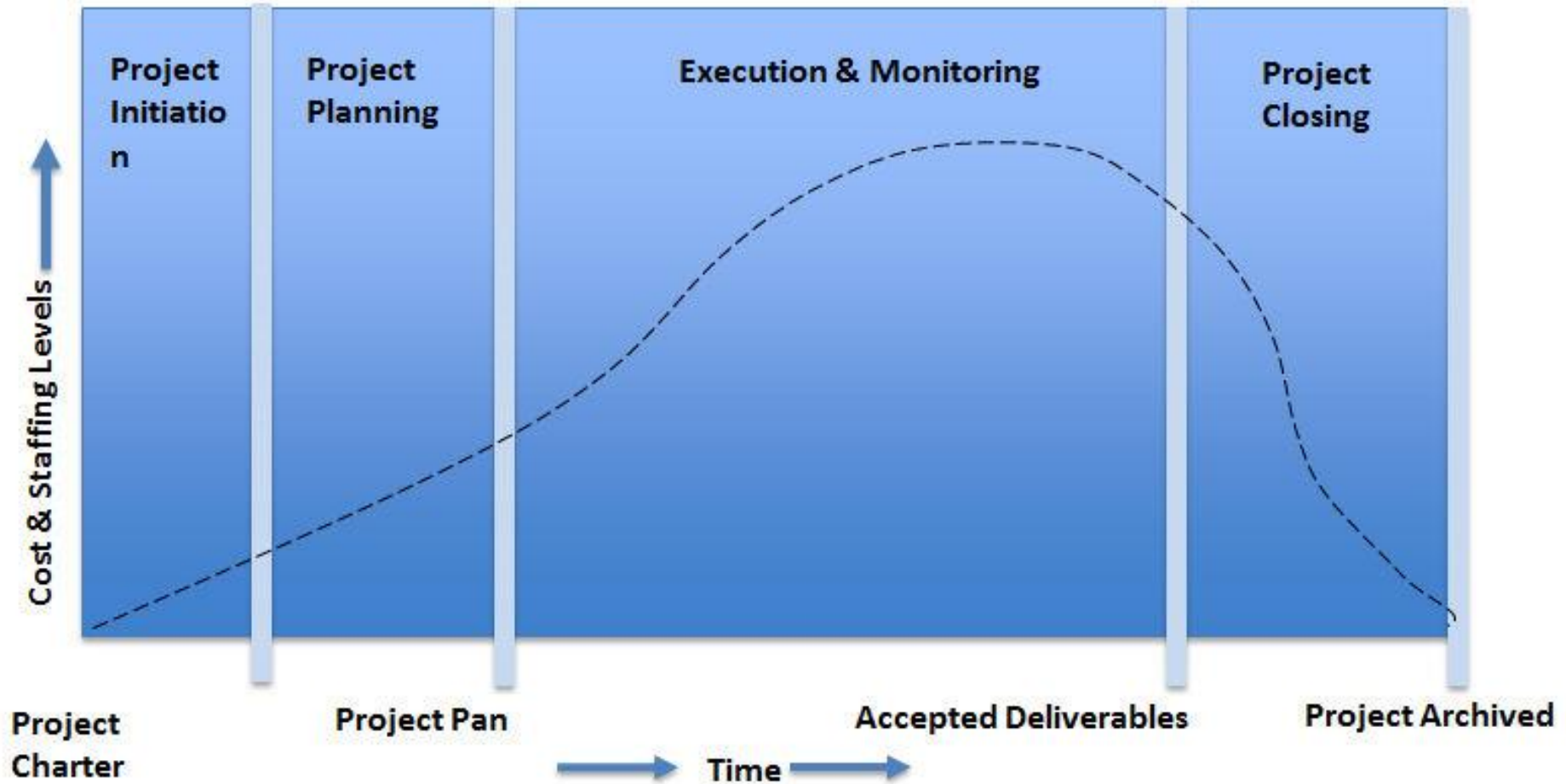
- Coordination
- PO/Contract Requirements
- Budget
- Submittals
- As Build Drawings
- Sign-Off / Approvals
- Risk Mitigation

Security Project Management Life Cycle

- Closing
- Initiation
- Planning
- Execution
- Monitoring



Project Time Curve



Project Initiation

Identify stakeholders, project team members & resources required.

Recognize the required effort.

Identify potential risks, vulnerabilities & threats relative to success.

Confirm project goals & objectives.

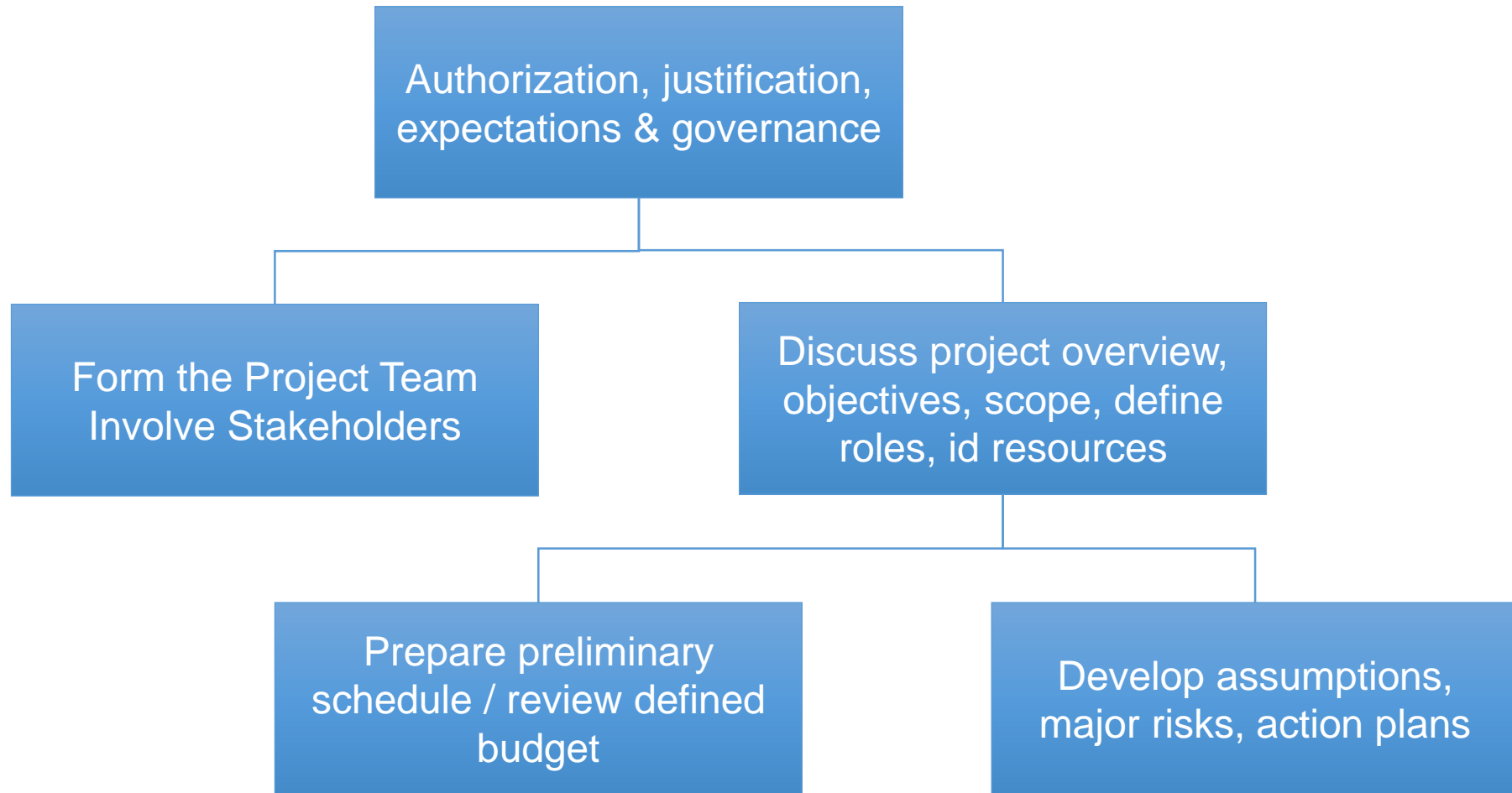
Review project scope, legal requirements, budget, expected time frames, etc.

Confirm against expectations of stakeholders & written documentation.

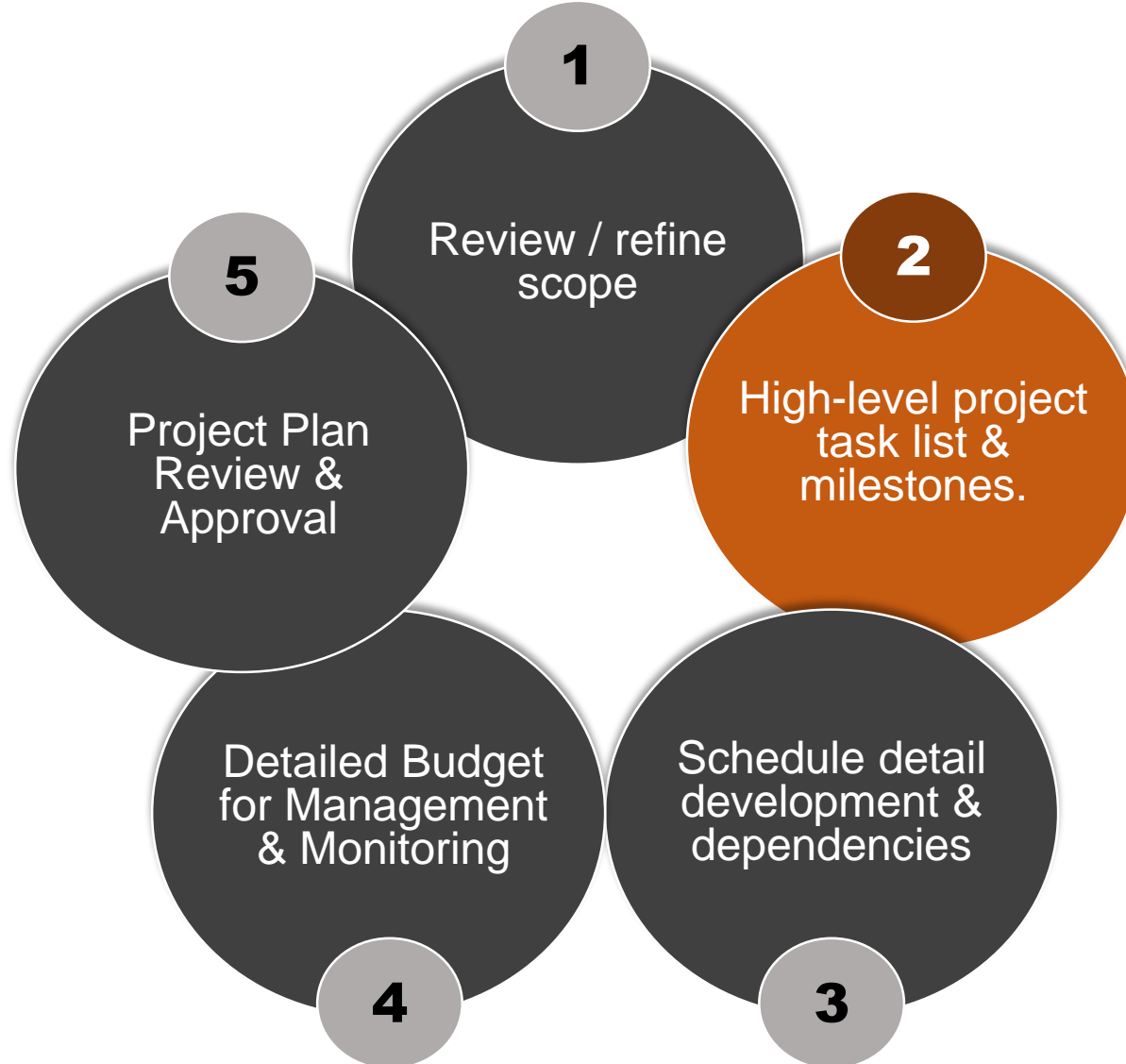
Discuss & review project closing expectations.

What is required for successful signoff of completion & closing.

Project Initiation: Activities & Deliverables



Project Planning: Activities & Deliverables



Project Planning: Essential Steps

Define Project Goals & Objectives

Define Scope Of Work

Define Project Execution Plan

Set Time Parameters

Develop And Finalize Budget

Define Resources Needed,
Type, & When

Develop Communications Plan

Develop Project Purchasing,
Billing, & Cash Flow Plan

Obtain Necessary Reviews,
& Authorizations

Prepare Risk Management Plan

Project Execution

Always be closing.

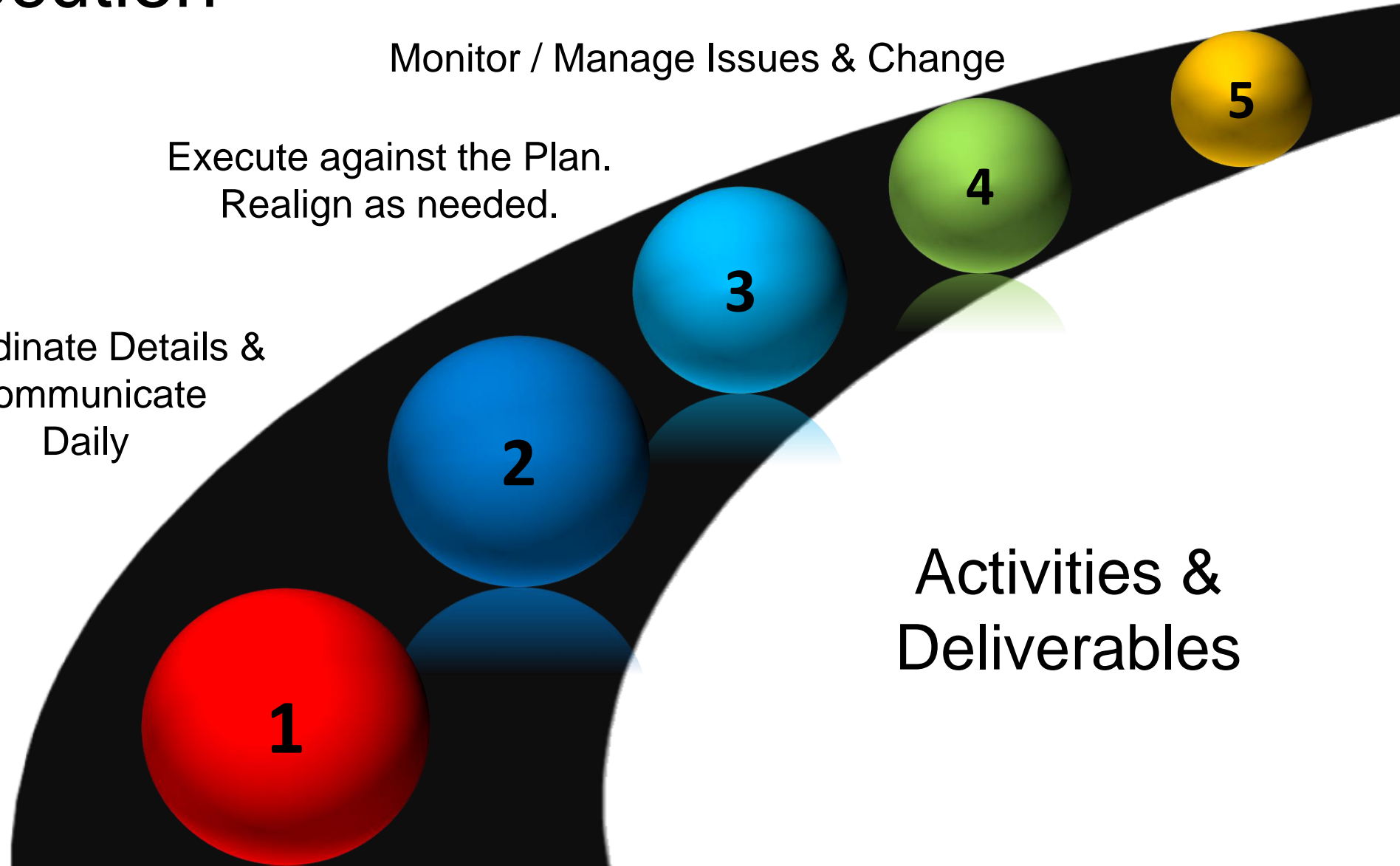
Monitor / Manage Issues & Change

Execute against the Plan.
Realign as needed.

Coordinate Details &
Communicate
Daily

Lead & Manage
the Team. Establish
expectations.

Activities &
Deliverables



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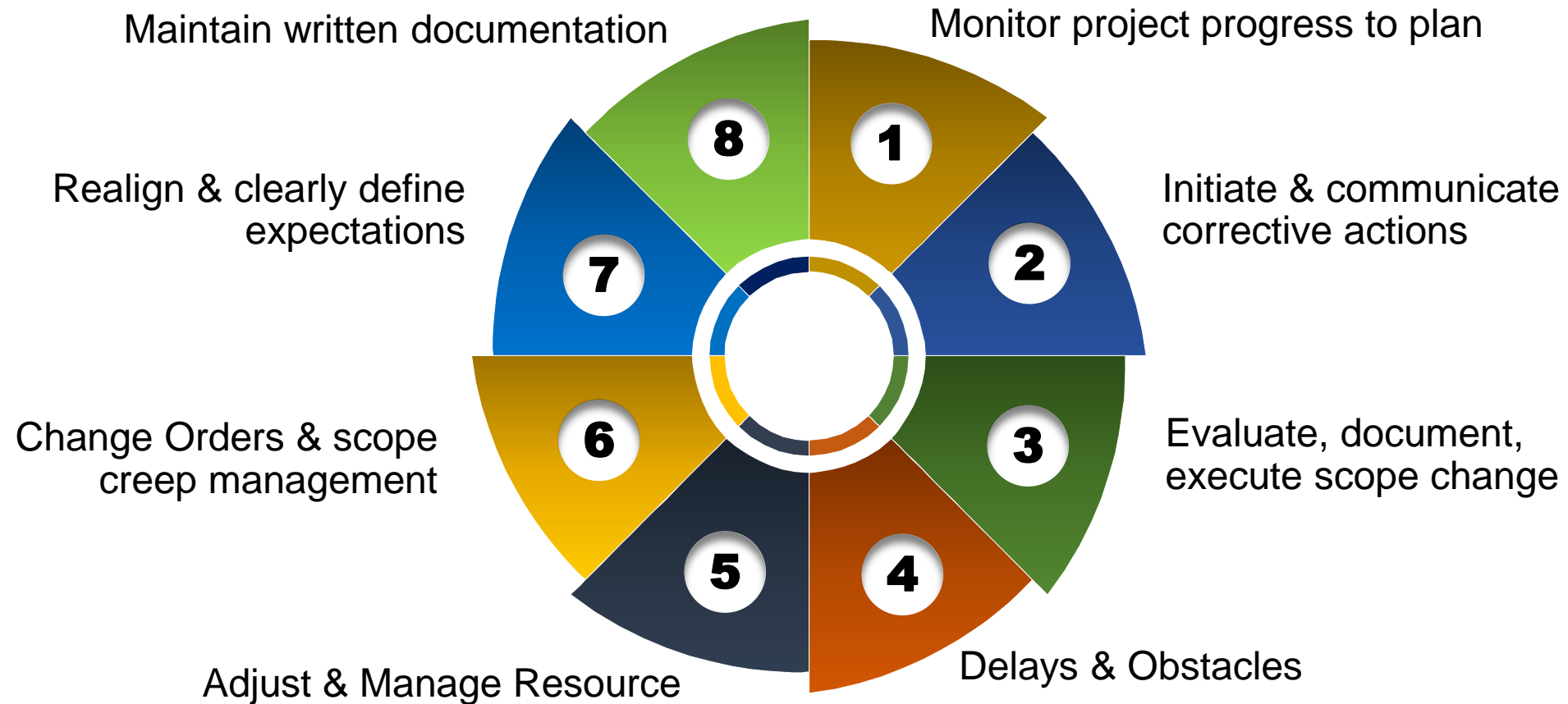
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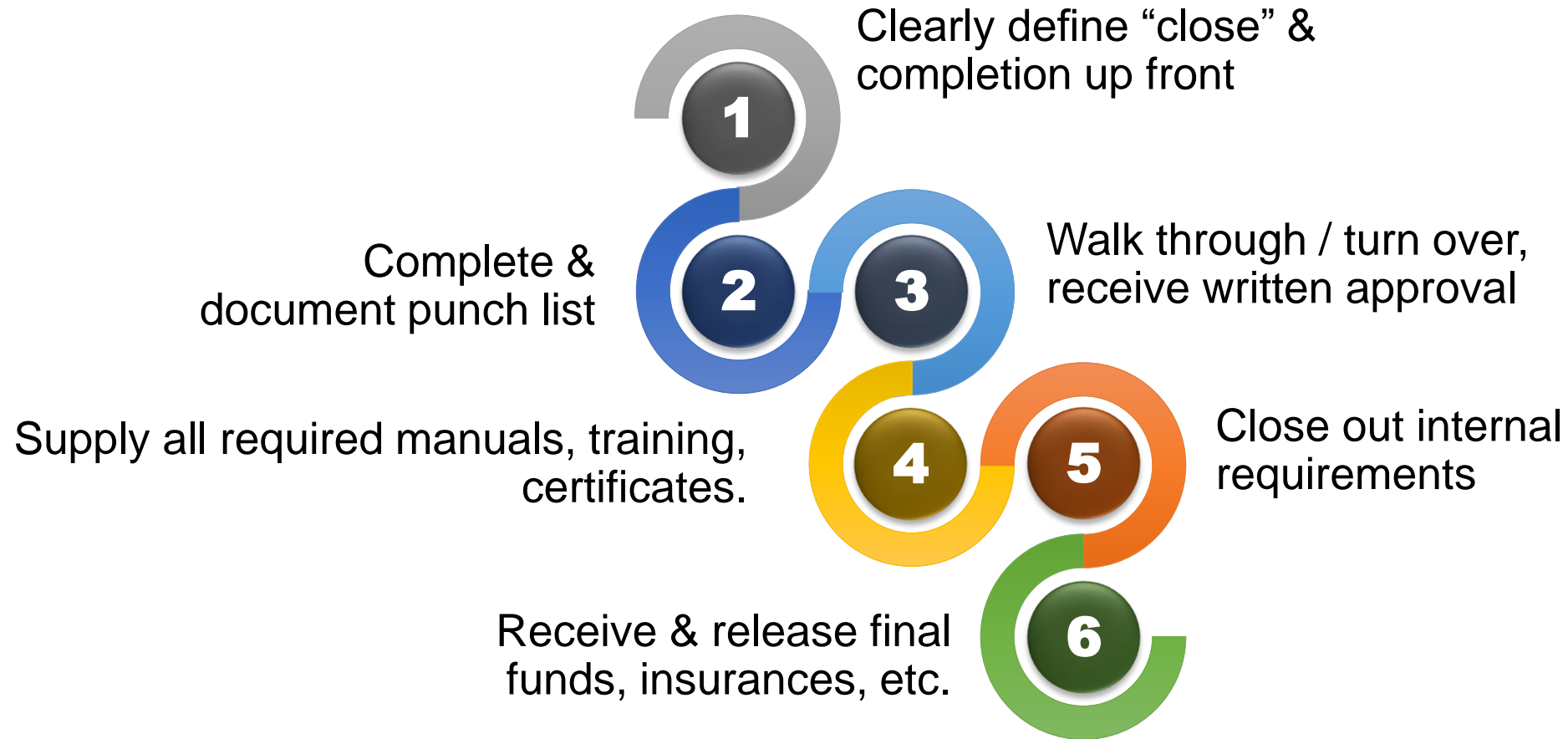
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Project Monitoring & Control



Project Closing



Keys to Successful Security Project Management

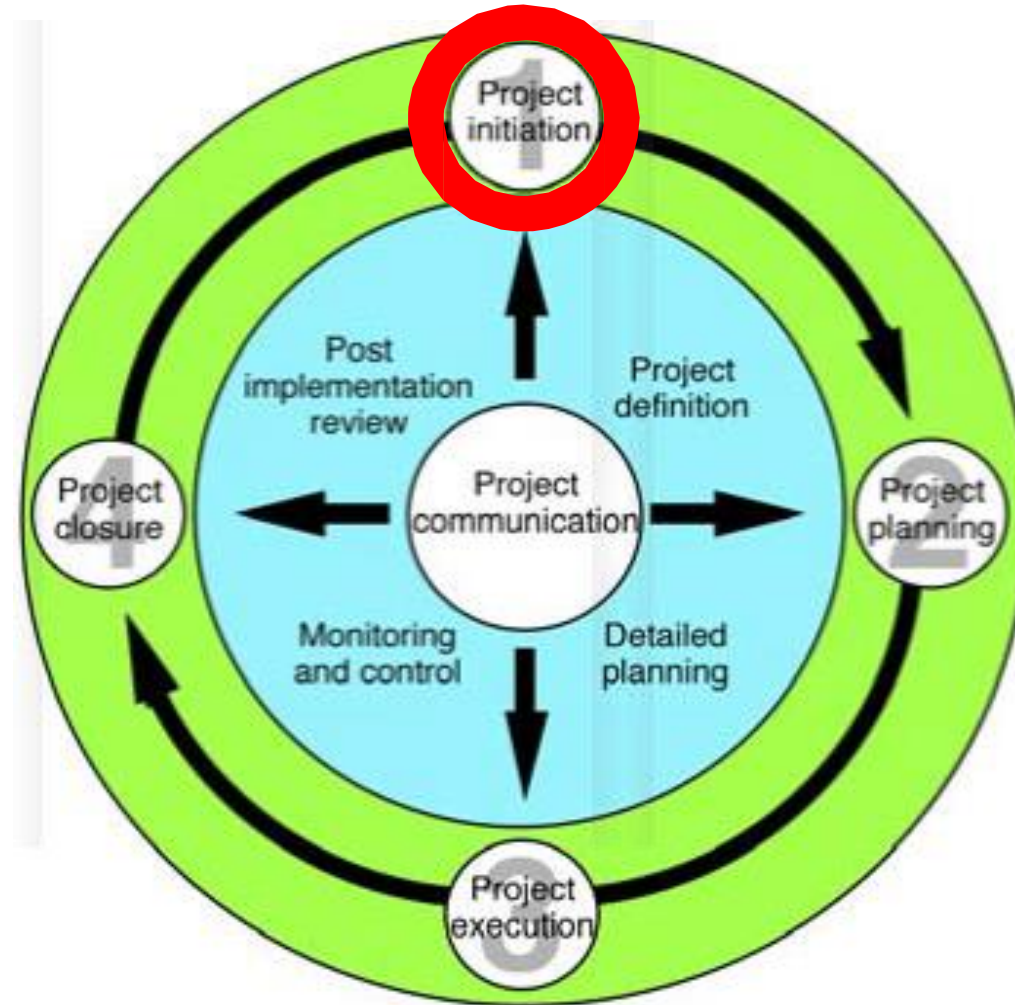


- Leadership
- Resourcefulness
- Communication clarity
- Decision maker
- Detailed, coordinated plan
- Prioritize
- Monitor & realign
- Deliver excellence

A hand is pointing at a bar chart on a document. The chart has several bars of varying heights, with the tallest bar highlighted in a light blue color. The background is a blurred office setting with a wooden desk and a laptop. Overlaid on the image are various digital graphics, including a network of nodes and lines, a circular gauge, and a stylized globe. The text is contained within a white, cloud-like shape.

Initiation
Part III to Planning,
Organizing, & Controlling
Resources during a Project

Project Initiation



Project Initiation



1

Understand the importance of the Initiation Stage

2

Identify potential Project Risks

3

Perspective: details & overall objectives

4

Project Plan against required scope

Initiation Objectives

Initiation: start, pre-plan **01**

Clearly defined scope of work **03**

Timeline, phases, completion date **05**

Definition of major project deliverables **07**

Fence & Boundaries: Specific Project Goals **02**

Resource Identification **04**

Understanding of Stakeholder requirements **06**

Definition of key project risks **08**

Planning Objectives

Understand Project Scope & contract documents

01

Define project time lines & detailed schedule.

03

Define project budget, management process & tools

05

Define project monitoring, tracking & communications protocols

07

Define project deliverables, milestones & requirements for closing

02

Define & allocate project resources & requirements

04

Identify key risks, issues and impacts. Establish escalation process.

06

Identify key risks and interdependencies
Analyze to define gaps

08

Objectives and Deliverables

Objectives

Project Definition Scope & Objectives

- Project timeframe /milestones
- Deliverables
- Project organization / stakeholders
- Identify budget
- Identify key risks, issues and interdependencies
- Define project monitoring & KPIs
- Identify scope, time, budget, resource gaps

Deliverables

Project Charter covering:

- Objectives
- Scope
- Milestones & deliverables
- Organization / stakeholders
- Budget approvals
- Resource allocation
- Schedule
- Assigned Project Manager
- Formal Approval to Proceed

Project Management Knowledge Areas – Initiation

Project Integration Management

- **Develop Project Charter**
- Develop Project Management Plan
- Direct and Manage Project Execution
- Monitor and Control Project Work
- Perform Integrated Change Control
- Close Project or Phase

Project Time Management

- Define Activities
- Sequence Activities
- Estimate Activity Resources
- Estimate Activity Durations
- **Develop Schedule**
- Control Schedule

Project Scope Management

- Collect Requirements
- **Define Scope**
- Create WBS
- Verify Project Scope
- Control Project Scope

Project Cost Management

- **Estimate Costs**
- **Determine Budget**
- Control Costs

Project Quality Management

- Plan Quality
- Perform Quality Assurance
- Perform Quality Control

Understanding the nature of projects

PM Knowledge: Initiation Processes

Project Human Resources Management

- Develop Human Resource Plan
- Acquire Project Team
- Develop Project Team
- Manage Project Team

Project Risk Management

- Plan Risk Management
- **Identify Risks**
- Perform Qualitative Risk Analysis
- Perform Quantitative Risk Analysis
- Plan Risk Responses
- Monitor and Control Risks

Project Procurement Management

- Plan Procurements
- Conduct Procurements
- Administer Procurements
- Close Procurements

Project Communication Management

- **Identify Stakeholders**
- **Plan Communications**
- Manage Communication
- Manage Stakeholder Expectations
- Report Performance

In which scope-management process are subject mater experts first used?

1. Scope planning
2. Scope definition
3. Initiation
4. Scope verification

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1. Scope planning
2. Scope definition
3. **Initiation**
4. Scope verification

Project Definition



Project Definition

Triggers



Triggers help define project criticalities, priorities, deadlines & impact on expected outcomes.

- Responding to an existing problem
- Fulfilling strategic objective
- Responding to a new or amended legislation, etc.
- End of life products during project execution
- AHJ approvals

Project Definition

Goals & Objectives



Goals: high level statements.

Provide context of purpose & alignment to business objectives.

- Customer
- Your Company

Objectives are lower level statements that describe the specific, tangible products and deliverables that the project will deliver.

Project Definition: Goals & Objectives



- ✓ Goal statements are designed to be vague.
- ✓ Objectives need to be well-worded to be **SMART**:
 - S**pecific,
 - M**easurable,
 - A**ttainable/Achievable,
 - R**ealistic and
 - T**ime-bound.

Project Definition: Goals & Objectives



An example of a project goal is:

To increase the overall satisfaction levels for customer system administrator training.

Project Definition: Goals & Objectives

An example of an objective statement is:

Enhance the capabilities and skill level of the staff handling stakeholder interactions within a period of three months on services and on how to track the status of stakeholder requests aiming to increase the ratio of first time response to 75%.

Project Definition Scope



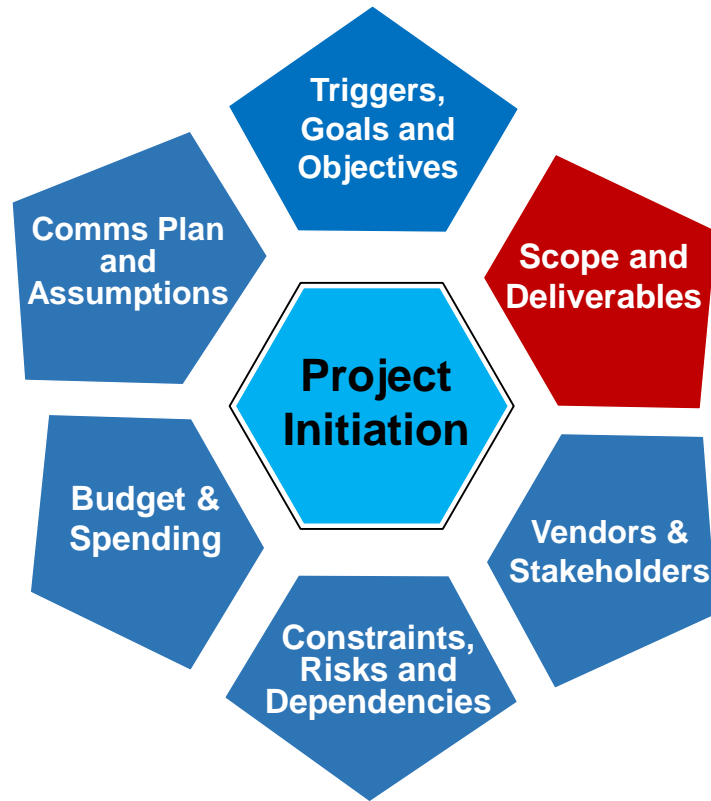
- Clearly defining project scope leads to **SUCCESS**.
- Project scope is about clearly articulating
 - *what is included* in your project and more importantly
 - *what is not included*
- Consider:
 - Contract
 - RFP requirements / Bid Response
 - Issued for Construction Drawings, Specs, RFI responses, etc.
- Manage to contract terms

Project Definition Scope



- Scope changes require definition
- A specific process
- Are contractual
- Approval required prior to execution
- Fall under original contract terms & conditions
- May require line item pricing per original schedule of values
- May include 3rd party i.e. subcontractors with separate contracts
- May increase bonding and insurance requirements
- Increase risk

Project Definition Deliverables



- ✓ Once the goals / objectives and scope are defined, the project manager needs to clearly define the set of deliverables that the project is expected to achieve.
- ✓ Deliverables can be either Tangible or Intangible.
For example: a report, document or system upgrade are considered tangible deliverables while deliverables such as “achieving recognition” or “building capability or human competence” are intangible.
- ✓ Deliverables must be achievable, so when defining a deliverable you should ask yourself “can this actually be delivered?”

Project Definition

Vendors & Stakeholders



Vendors

When defining the security project, if there is a need to procure services or products from a specific vendor, the following shall be defined:

Type of capabilities required

Vendors that can provide the service or product that fulfill the required capabilities

Vendors are engaged by contractual agreements which are supported by SOW that clearly define the role of the vendor

Stakeholders

Are entities that have an interest in a given project.

May be inside or outside an organization (Sponsor, Influencer, etc.)

Stakeholders need to be updated regularly on project progress

Find Stakeholders early in the process; Have your communication plan ready.

Ask them for assistance when needed. Inform them about project closure.

Project Definition

Constraints



1

Constraint: restriction or being compelled to avoid performing some action.

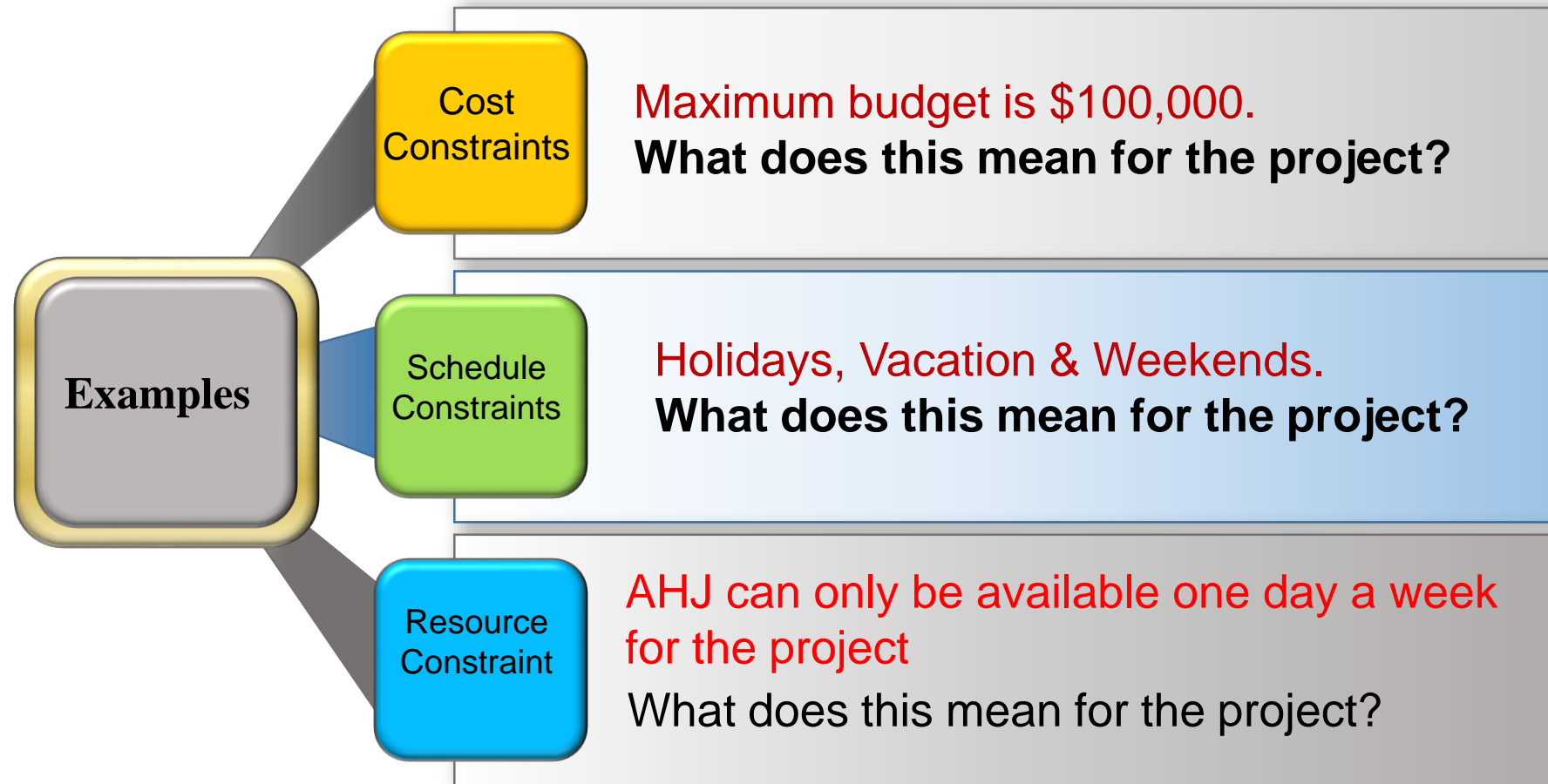
2

Include any limitations to project team's ability to completing the project successfully.

3

Typically constraints relate to resources, cost, personnel, schedule, scope or quality.

Project Definition Constraints



Project Definition Risks



From the point of initiation, why should assumptions be documented?

1. Assumptions limit the project team's options for decision making.
2. Assumptions might prove to be incorrect. The ability to identify these assumptions allows for baseline adjustments in case of project crisis.
3. Assumption analysis is a key technique of risk identification.
4. In case of schedule or budget overruns, the documentation of assumptions provides an accountability trail.

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You have created the project charter but could not get it approved by senior management. Your manager and his boss have asked you to begin the project anyway. Which of the following actions is the best thing to do?

1. Focus on other projects that have a signed charter.
2. Start work on critical path tasks.
3. Update your Project Risk Log.
4. Show your manager the impact of proceeding without approval.

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Project Definition

Dependencies & Schedule



- Security Project details include numerous dependencies:
 - Prior to C, A & B must be completed
- Identify dependencies upfront
- Consider:
 - Resources
 - Specific work details
 - Holidays
 - 3rd party work
 - Overall schedule, your schedule within overall
 - Risks: contractual, other schedules, costs, etc.

Project Definition

Budget & Spending



- Budget Definition
 - Review your company's bid / proposal response
 - Thoroughly review estimates leading to response
 - Complete engineering review
 - Understand subcontracted portions of work
- Determine budget management
 - Cadence of review
 - Invoicing dates you to customer; your subs to you
 - Budget change management
 - % to complete
- Customer:
 - What information are you required to share?

Project Definition

Communications Plan

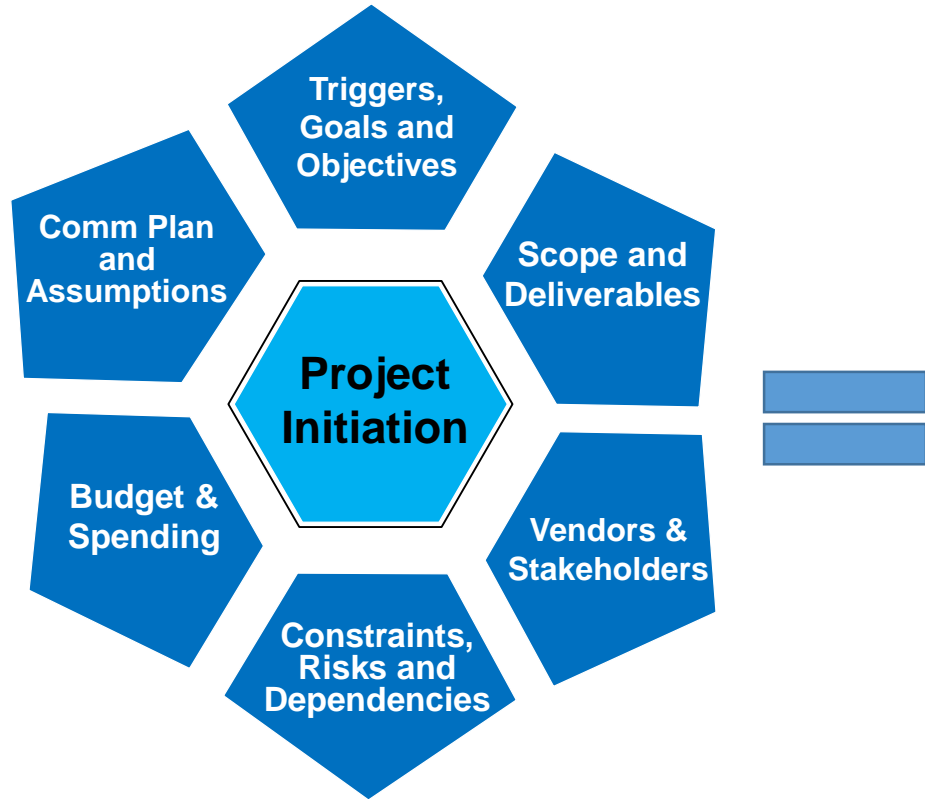


A well planned project has a well planned communication strategy.

The following are some options when creating a Communication Plan:


- Initiation Meeting
- Project Kick-Off
- Status Reports

Project Initiation




Project Charter


A Project Charter is a living document outlining the issues, targets and framework of a process improvement effort.




Problem Statement
The problem captured in the form of a measurement.




Business Case
The business reasons for doing the project.




Goal Statement
The target of the process measurement.



Timeline
When each project phase will be completed.



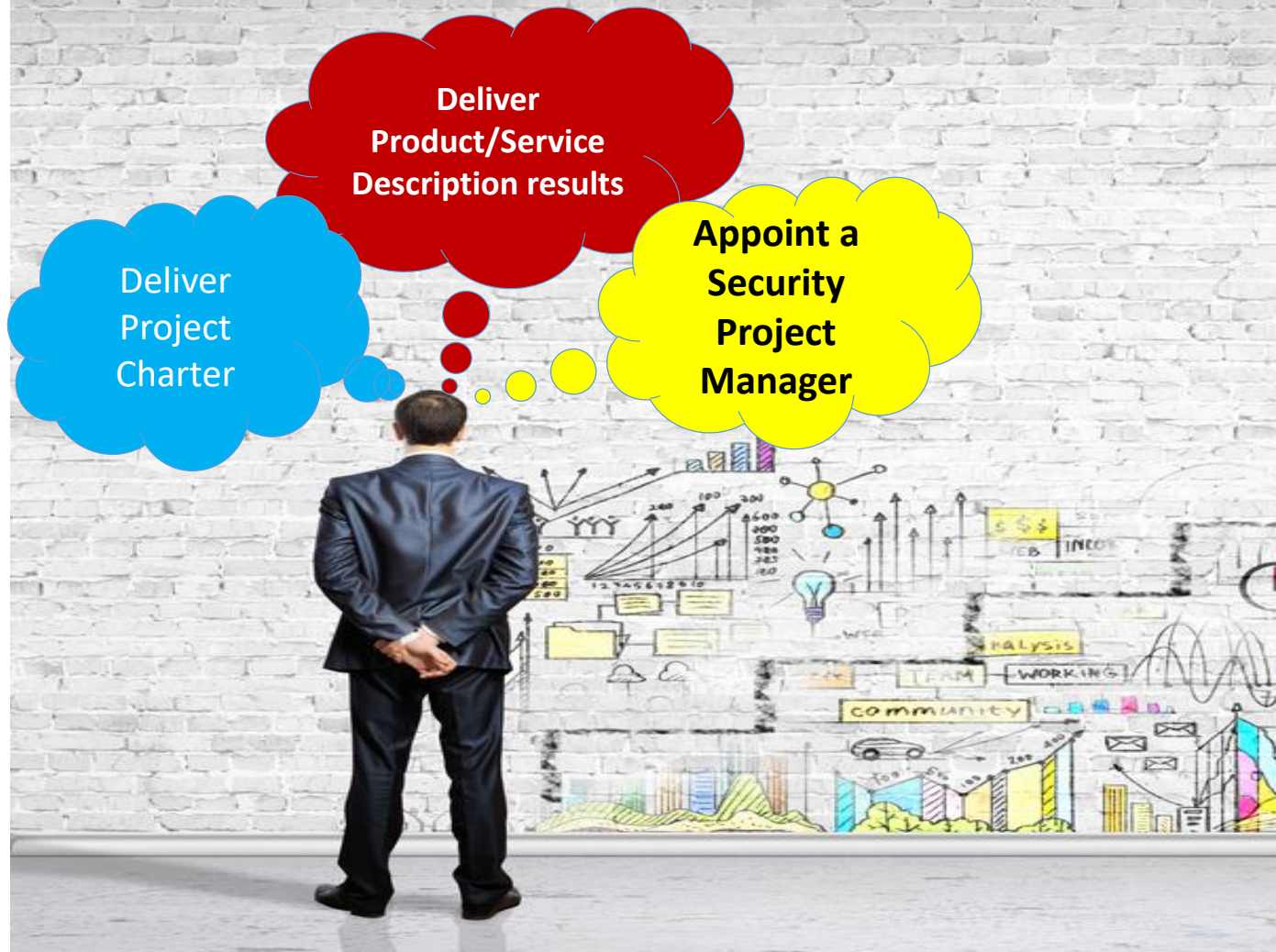
Scope
What's in and what's out of the project.



Team Members
The people who will participate in the project.

Project Charter			
Project Name			
Project Description			
Project Manager		Date Approved	
Project Sponsor		Signature	
Business Case		Expected Goals/Deliverables	
Team Members			
	Name	Role	
Risks and Constraints		Milestones	

Keys to a Successful Security Project Initiation



- Project Charter Defined
- Goals & Objectives Understood
- Project Scope Defined
- Timeline Defined
- Assumptions & Constraints Identified