

120

THE SCIENCE OF PLANNING A PROJECT THAT #GSD



PROJECT & PROGRAM MANAGEMENT
PRODUCT MANAGEMENT
CHANGE MANAGEMENT



**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

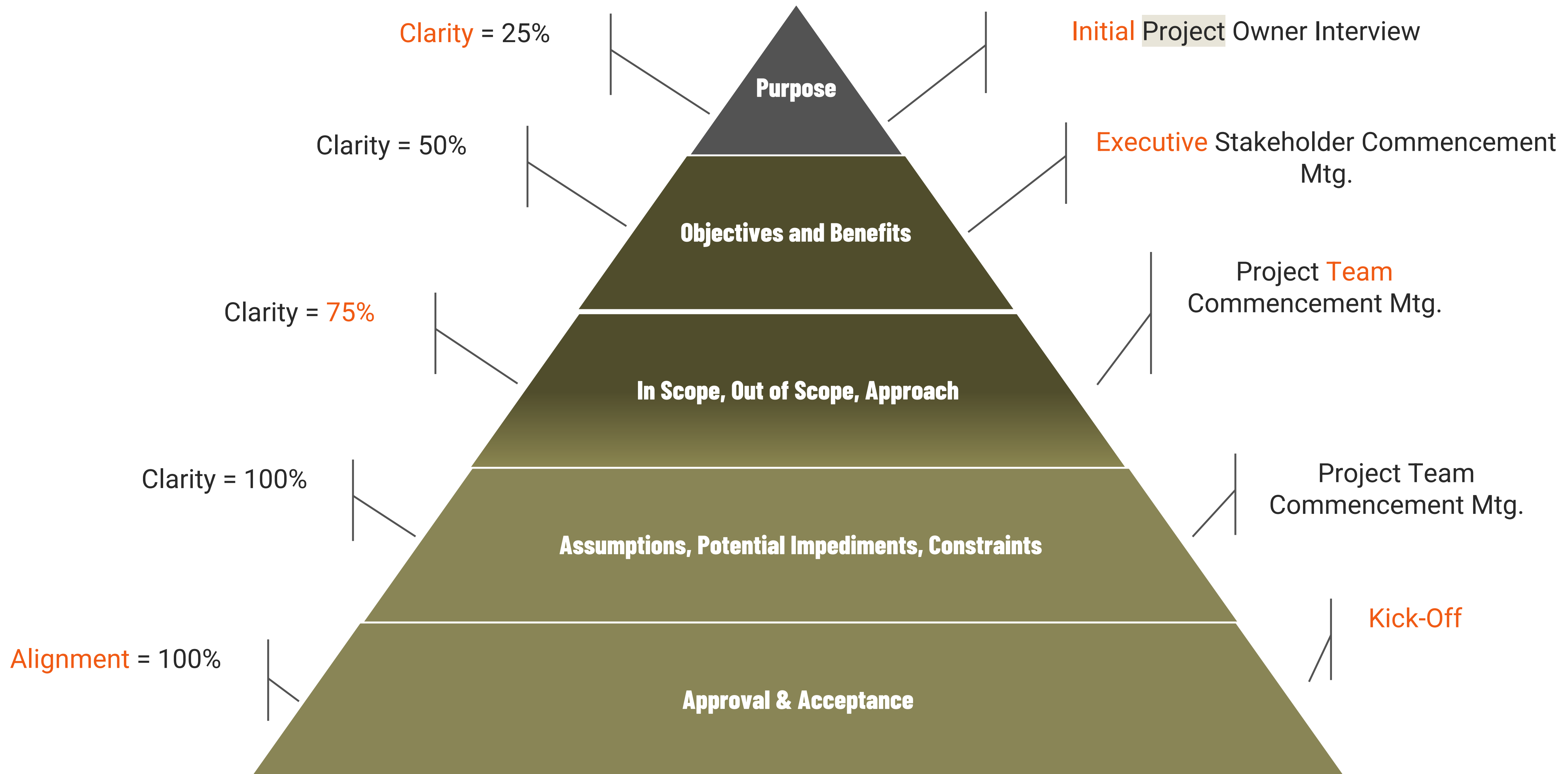
1. Define **Future** State
2. Determine **Current** State
3. **Deliver** a Roadmap

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

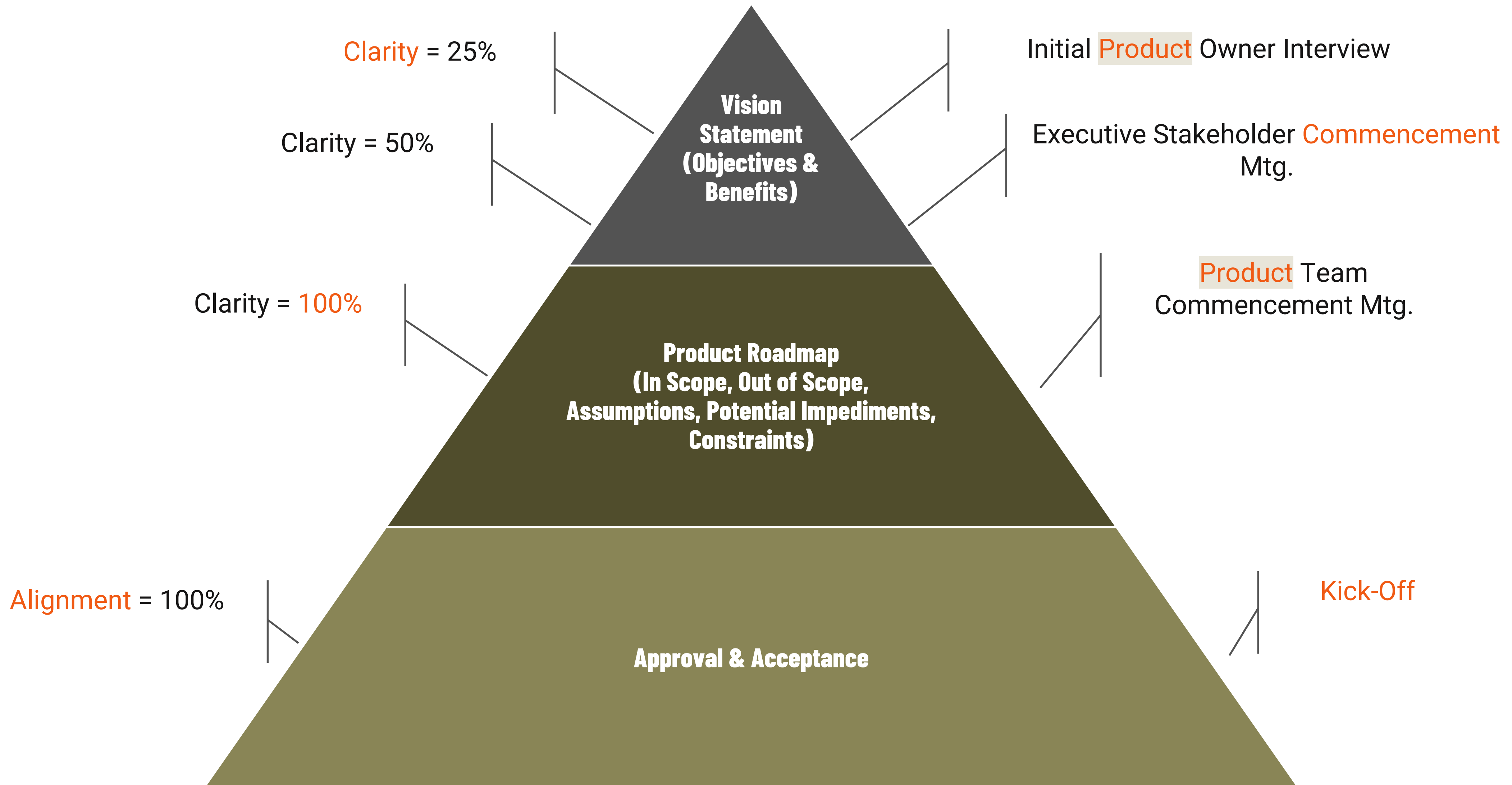


*** The Ed Freeman quote is derived from his TED Talk titled "[Business is About Purpose.](#)"

PROJECT CHARTER LIFECYCLE



AGILE VISION & ROADMAP LIFECYCLE



WE COMMUNICATE TO LEAD

THE WBS

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.
- Testing of Zen and its certification for use in the production 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 IntruderHunt and IntruderTrap 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.

	%	Task Name	Duration	Work	Start
16	0%	[-] Security Services Support Policies & Procedures Establishment	151 days	211 hrs	Mon 1/31
17	0%	[+] Establish Zen software distribution policy & procedure	28 days	87 hrs	Mon 1/31
31	0%	[+] Establish Zen software inventory policy & procedure	15 days	29 hrs	Thu 3/10
41	0%	[+] Establish Zen remote control policy & procedure	14 days	32 hrs	Thu 3/31
51	0%	[+] Establish IceBox policy & procedure	14 days	31 hrs	Wed 4/20
61	0%	[+] Establish BlackBox policy & procedure	11 days	32 hrs	Tue 5/10
71					
72	13%	[-] HTTP & SMTP Monitoring & Reporting Implementation	60 days	74 hrs	Mon 1/31
73	38%	[+] Procure HTTP & SMTP Monitoring Hardware	48 days	18 hrs	Mon 1/31
80	0%	[+] Deploy Internet Inspector	6 days	23 hrs	Thu 4/7
84	0%	[+] Deploy Messenger Inspector	6 days	33 hrs	Fri 4/15
89					
90	2%	[-] Zen Software Distribution Implementation	190 days	1,631 hrs	Mon 1/31
91	45%	[+] Establish Zen requirements & environment design documentation	22 days	75 hrs	Mon 1/31
102	0%	[+] Build Zen test environment	31 days	119 hrs	Wed 3/2
117	0%	[+] Test Zen & certify for use in Production environment	20 days	62 hrs	Thu 4/14
133	0%	[+] Deploy Zen IT pilot	11 days	35 hrs	Thu 5/12
140	0%	[+] Create & certify standard workstation image for Zen deployment	18 days	64 hrs	Fri 5/27
147	0%	[+] Procure hardware & software for Zen deployment	32 days	22 hrs	Wed 6/22
157	0%	[+] Set up & configure Zen infrastructure in Los Angeles	25 days	100 hrs	Thu 7/21
171	0%	[+] Deploy Zen in Los Angeles	21 days	70 hrs	Thu 8/25
181	0%	[+] Set up & configure Zen infrastructure in New York	25 days	100 hrs	Thu 7/21
195	0%	[+] Deploy Zen in New York	20 days	63 hrs	Thu 8/25
205	0%	<u>Completion of Miami office construction</u>	<u>130 days</u>	<u>520 hrs</u>	<u>Mon 1/31</u>
206	0%	[+] Set up & configure Zen infrastructure in Miami	13 days	52 hrs	Thu 9/22
220	0%	[+] Deploy Zen in Miami	9 days	28 hrs	Tue 10/11
230	0%	[+] Set up & configure Zen infrastructure in Toronto	25 days	100 hrs	Thu 7/21
244	0%	[+] Deploy Zen in Toronto	17 days	60 hrs	Thu 8/25
254	0%	[+] Set up & configure Zen infrastructure in Dallas	25 days	98 hrs	Thu 7/21
268	0%	[+] Deploy Zen in Dallas	8 days	63 hrs	Thu 8/25
278					
279	0%	[-] Network & Mobile Workstation Intrusion Detection Implementation	101 days	210 hrs	Mon 1/31
280	0%	[+] Establish Intrusion Detection Hardware and Software Design	4 days	16 hrs	Mon 1/31
283	0%	[+] Procure Intrusion Detection hardware & software	25 days	12 hrs	Fri 2/4
290	0%	[+] Deploy IntruderHunt in S. California	12 days	48 hrs	Thu 3/10
295	0%	[+] Deploy IntruderTrap in S. California	16 days	52 hrs	Wed 4/13
301	0%	[+] Stage and Configure IntruderHunt & IntruderTrap for remote locations	17 days	34 hrs	Thu 5/5
307	0%	[+] Deploy IntruderHunt & IntruderTrap in remote locations	16 days	48 hrs	Mon 5/30
320					
321	0%	[-] BlackBox Mobile Workstation Firewall Protection Implementation	48 days	266 hrs	Mon 1/31
322	0%	[+] Prepare for BlackBox deployment	23 days	85 hrs	Mon 1/31
332	0%	<u>IceBox version 5.0 is released</u>	<u>25 days</u>	<u>100 hrs</u>	<u>Mon 1/31</u>
333	0%	[+] Implement IceBox	8 days	29 hrs	Mon 3/7
338	0%	[+] Deploy BlackBox pilot	11 days	38 hrs	Thu 3/17

120VC Work Plan Print View

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

- Establishment of the Security Services Support Policies and Procedures.
- 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 Recont Technologies and BlackBox by IST will be employed as our intrusion detection systems. Intrusion detection is critical to ensuring our systems and intellectual property are never compromised. Recont 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 Exceron 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 attacked 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

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2.3. Out of Scope

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- 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 Recount Technologies and BlackBox by IST will be employed as our intrusion detection systems.
- Internet Inspector and IM Messenger Inspector/Anti-virus bundle by Exceron will be employed as our HTTP and SMTP monitoring and reporting tools.
- BlackBox will be deployed as our workstation firewall tool.

2.6. Potential Impediments

Impediment	Mitigation
Limited internal security product deployment and management expertise (single point of failure).	External resources with security product and deployment management experience will be procured to assist with project planning and key stages of deployment.
Mobile user variant schedules and availability.	The deployment plan will be structured to accommodate the schedules of mobile users by allowing multiple appointment times and equipment exchange opportunities.
Mobile users with personal equipment utilizing nonstandard software.	A separate initiative will institute a new policy requiring that only Client Corp. equipment will be authorized to connect to the network.
LAN segment downtime due to increased traffic related to remote software distribution.	The implementation activities will be executed during non-peak hours, and resources will be on-hand to address issues immediately as they arise.

- **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

QUESTIONING

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

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.

LEADERSHIP IS A FIERCE COMMITMENT TO ALIGNMENT AND CLEAR EXPECTATIONS

SUMMARIZING

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

REFLECTING

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

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

VET & SANITY CHECK

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 3

FINALIZE THE SCHEDULE

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 tasks **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](https://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](https://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



THANKS