



Closing the Loop: Project Assessment and Leveraging Goals for Future Planning

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Schedule for this webinar

- Process of project goals and assessment
- Determining useful metrics for a project
- Sharing methods for tracking metrics, progress, and time
- Adapting to project roadblocks
- Defining and celebrating project success
- Setting new goals for future projects



Objectives

- Know how to set measurable goals and determine project success
- Have the tools needed to track project progress
- Be able to communicate goals and outcomes with various audiences
- Feel confident about project progress, even when things don't go as planned



Project Goals and Assessment

Four cornerstones of a project goal:

- Time
- Target
- Budget
- So What?





Project Goals and Assessment



Stick to your goals!



Project Assessment

Downward spiral can lead to:

- Poor quality
- Inefficiency
- Late delivery
- Poor predictability





Discussion

What are some problems you have encountered when working on projects?



Discussion

What are some problems you have encountered when working on projects?

The group spent 5 minutes discussing this question. A complete transcript of Chat 1, Signs of Trouble, can be downloaded on the webinar's home page found in the text below.



Signs of trouble

- Broad scope
- Failure to meet user needs
- Lack of re-engineering and re-definition of job roles and responsibilities
- Lack of clear goals
- Too many leaders
- Too much reliance on outside consultants
- Lack of contingency plan
- Inadequate testing
- Inadequate user training
- Denial that the project is in trouble



Determining useful metrics





Useful metrics for project management

- Productivity
- Scope of work
- Quality and satisfaction
- Cost
- Gross Margin



Discussion

What are some ways your project will help contribute to your organization's increased profits?



Discussion

What are some ways your project will help contribute to your organization's increased profits?

The group spent 5 minutes discussing this question. A complete transcript of Chat 2, Project ROI, can be downloaded on the webinar's home page found in the text below.



Implementing project metrics

Metrics = Action





Metrics for long-term value

- Better control
- Better odds for success
- Insight for future projects
- Build historical data



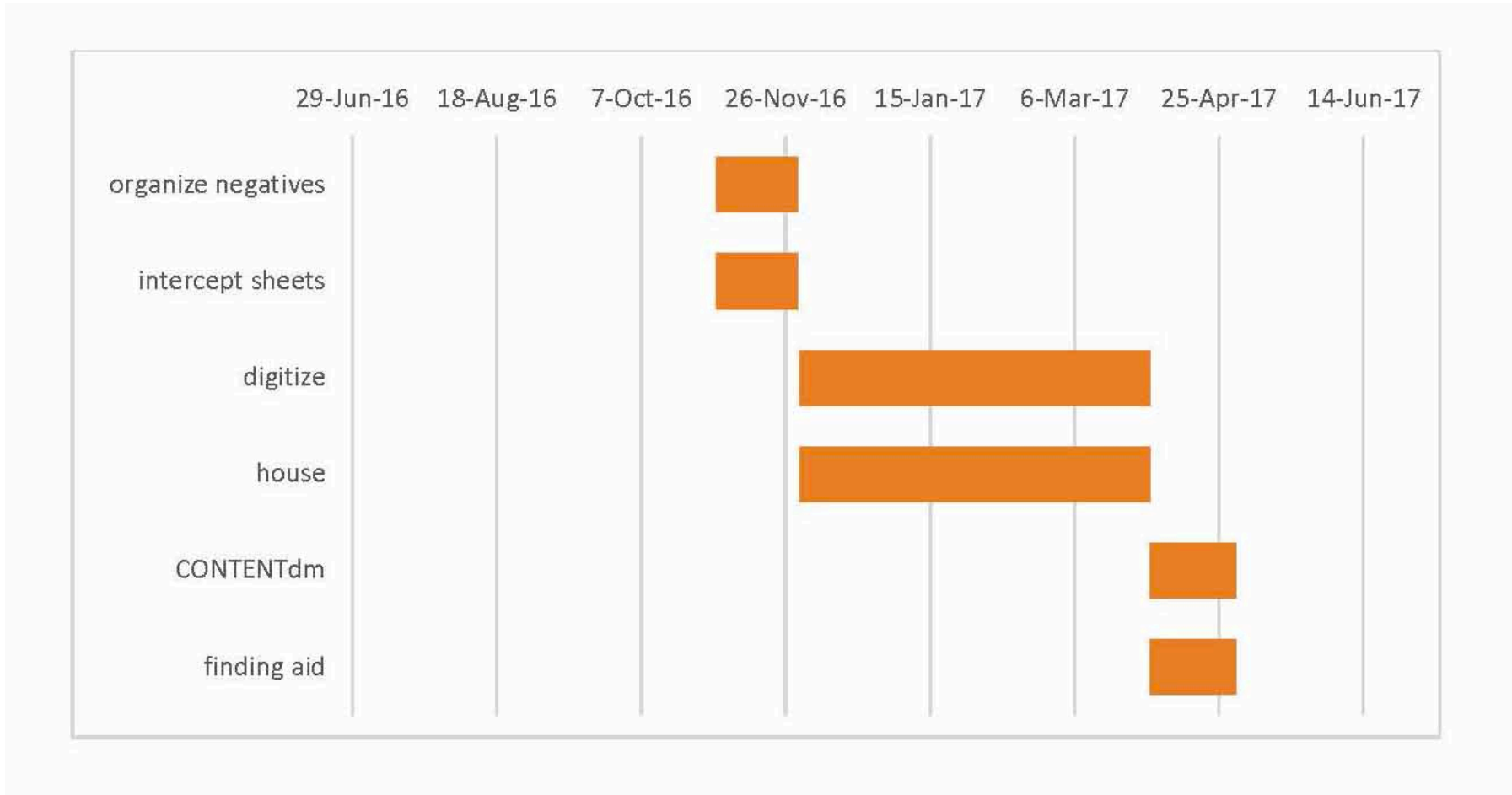
Ellen Ryan: Closing the Loop: Project Assessment and Leveraging Goals for Future Planning

C250 Janice Hill Collection																		
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
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	Mary Ann Craig (Posey) Papers (1830-1878)	1	2	6/25/2012	4/11/2012									Ellen				
	David Dewolf Papers (1849-50; 1861-1862)	2	6	6/25/2012	5/2/2012		8/28/2012		2					Ellen				
	James P. Haines Papers	2	6	6/25/2012	10/23/2012									Sawyer Magnus				
	James A. B. Butterfield (1834-1865)	10	29	6/25/2012	2/8/2013									Ellen				
	Cyrus Hutchinson Papers (1861-1863)	5	18	6/26/2012										Ellen				
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	Phillip Welshimer (1826-1900) Papers (Ms)	28	56	6/26/2012	11/16/2012									Jessica				
	Joseph B. Williamson Diary (Oct 1862-Oct 1863)	2	27	6/29/2012	11/5/2012		11/9/2012		2					Ellen				
	Calkins Family Papers	5	11	6/27/2012	9/20/2012									Robert Keough				
	Lyman H. Needham Letters (1861-1864)	1	2	6/27/2012	9/27/2012		11/9/2012		1					Robert Keough				
	Alexander K. Ewing Papers, 1862-1942 (1862-1864)	4	15	6/27/2012	11/2/2012									Amber Cason				
	Daniel W. Messick Letter	1	2	6/27/2012	10/25/2012									Sawyer Magnus				
	Daniel Lindly Miles (1827-1862) Papers (7/1862-1864)	2	3	6/27/2012	10/30/2012									Robert Keough				
	Daniel R. Smith Papers, 1860-1864	4	11	6/27/2012	1/28/2013									Ellen				
	Andrew (Civil War soldier)	1	2	6/27/2012	10/16/2012		11/9/2012		1					Robert Keough				
	William Kerley Strong	6	14	6/27/2012	9/18/2012									Nick Powell				
	James Swales	11	35	6/28/2012	1/18/2013									Ira King				
	Jeremiah Butcher	2	6	6/28/2012	10/30/2012									Sawyer Magnus				
	John Glenn	6	15	6/28/2012	10/16/2012									Sawyer Magnus				
	Cape Cnty Archives																	
	Loyalty Oath Bounty Claims Correspondence																	
		Bloss, Wolfgang, Claim for Bounty, 1866	3	8	9/25/2012	11/3/2011									AJ			
		Civil War-Soldier Claim for Bounty, Wille,	1	2	9/25/2012	11/3/2011									AJ			
	Correspondence, Washington D.C., 1866	19	32	9/25/2012	11/2/2011									AJ				
	Letter, Atlanta, GA, July, 1864	1	2	9/25/2012	11/3/2011									AJ				
	Letter, John Beck to Arnold, Dept. Provos	1	2	9/25/2012	11/2/2011									AJ				
	Oaths of Loyalty	11	21	9/25/2012	11/2/2011									AJ				
	Shoults, Amanda Jane	2	3	9/25/2012	11/3/2011									AJ				
	Waterbury, E. S.	4	8	9/25/2012	11/3/2011									AJ				
Cape River Heritage																		
	Oliver Collection (Soldier's Handbook)	1	34	10/1/2012	N/A													
	Photo, Red Rover	1	1	9/21/2012	N/A													
	Ledger	1	52	10/1/2012														



Gantt Charts

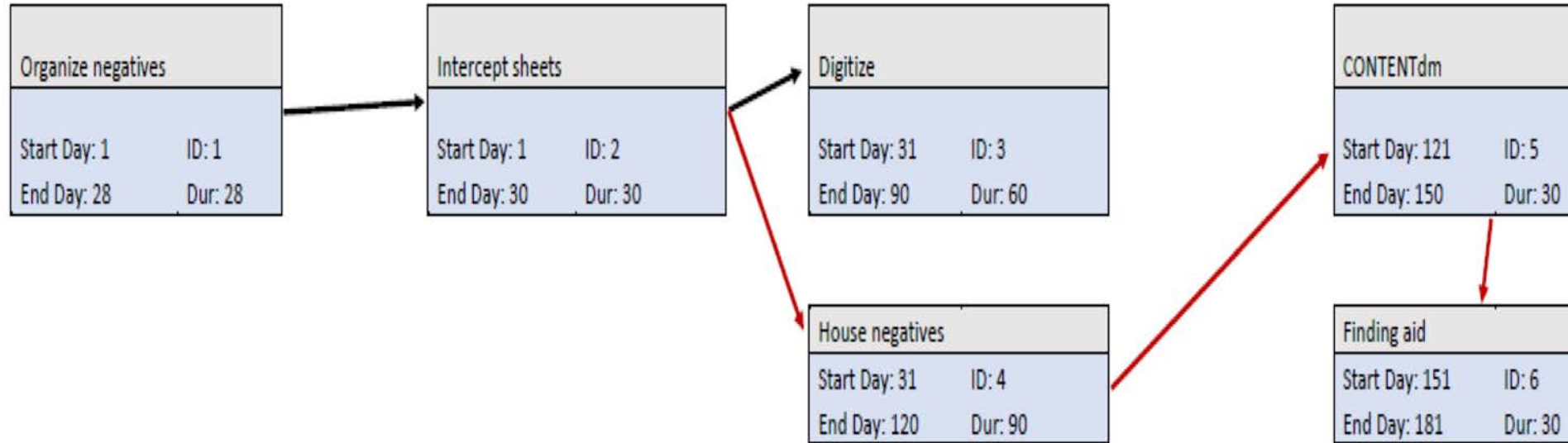
- Visual tool
- Display project schedules
- List project activities with start and end dates





PERT Charts

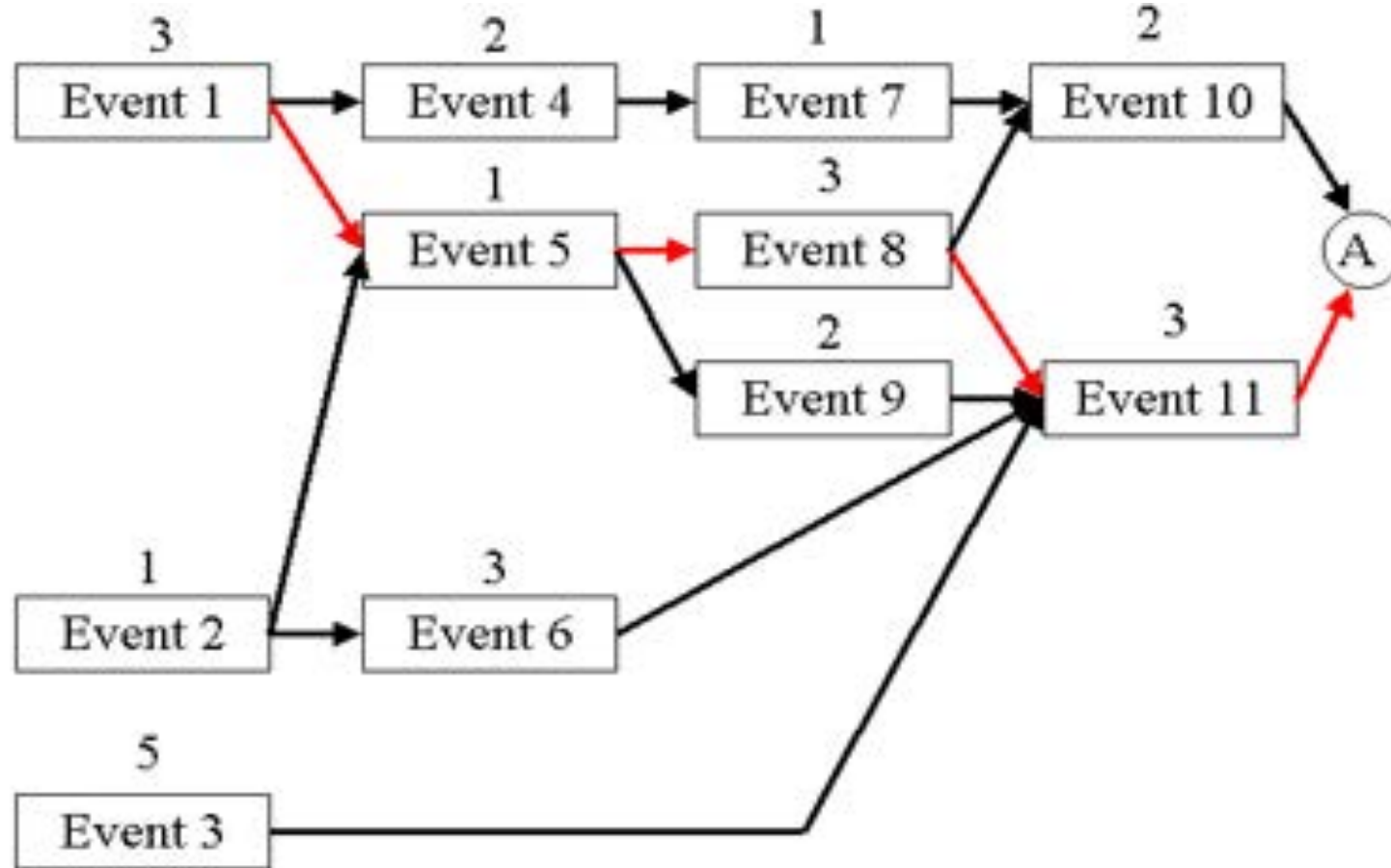
- Schedule
- Organize
- Coordinate tasks





CPM chart

- Fixed time estimates
- Analyze cost/time tradeoffs





PERT and CPM

- Schedule
- Budget
- Resources
- Time constraints





Six steps common to PERT and CPM

1. Define the project and prepare the work breakdown structure
2. Develop relationships among the activities
3. Draw the network connecting all of the activities
4. Assign the time and/or cost estimates to each activity
5. Compute the longest time path through the network (*critical path*)
6. Use the network to plan, schedule, monitor, and control the project



Adapting to roadblocks





Adapting to roadblocks

1. Ad hoc process
2. Structured and clear review process



Change can lead to conflict

1. Ideological conflict
2. Nonproductive conflict





Unexpected projects



Special Collections and Archives, Eli M. Oboler Library, Idaho State University



Discussion

What, if any, roadblocks have you encountered when working on projects?

How did you deal with them?

How do you deal with change?



Discussion

What, if any, roadblocks have you encountered when working on projects?

How did you deal with them?

How do you deal with change?

The group spent 8 minutes discussing this question. A complete transcript of Chat 3, Roadblocks, can be downloaded on the webinar's home page found in the text below.



Defining & celebrating project success





Defining and celebrating project success

- Realistic and definite goals
- Client satisfaction
- Profitability
- Market or service availability
- Implementation process
- Perceived value of project
- Communication
- Teamwork



Discussion

Does anyone else have ideas about celebrating project success?
How would you celebrate?



Discussion

Does anyone else have ideas about celebrating project success?

How would you celebrate?

The group spent 6 minutes discussing this question. A complete transcript of Chat 4, Celebration, can be downloaded on the webinar's home page found in the text below.



Defining and celebrating project success

- Thank you notes
- Reception
- Outing
- Flowers
- Awards ceremony
- Press release
- Lecture
- Exhibit
- Time off



Setting new goals built on previous projects

- What went wrong?
- What went right?
- What could have been better?



Common mistakes

- Too busy to evaluate projects once they've finished
- Moving on to the next project before taking the time to review the one you have just finished
- Failure to learn the lessons of past projects
- Not making those lessons learned available to other members of the organization



Questions, answers, and feedback

Thank You!

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