Step 1:
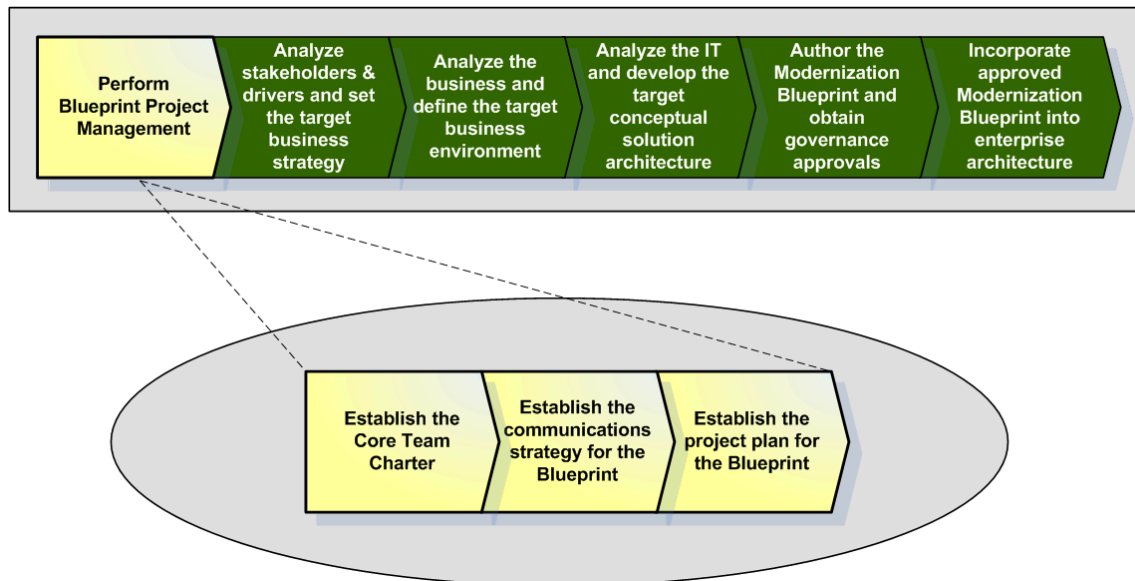
Perform Blueprint Project Management

Version 1.5, December 2006
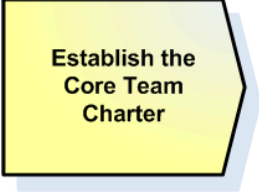
1. Step Description and Purpose

The Perform Blueprint Project Management step is intended to establish the key supporting project management tasks necessary to successfully manage and execute the Blueprint effort. The detailed activities for the Step 1 will ensure the project team follows solid project management practices, establishes its charter in line with blueprint's stated purpose, and executes its critical communications strategy.

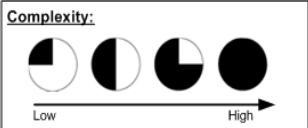# 2. Activities within this Step

The table below provides a quick reference for the activities within this step.

CTRL + click the activities for activity details ->	Establish the Core Team Charter	Establish the communications strategy for the Blueprint	Establish the project plan for the Blueprint
Inputs (source)	Record of Decision for Business Area to Blueprint (Step A) Core Team Commitment Agreement (Step C) Blueprint Purpose Statement (Step B) Record of Decision for Business Area to Blueprint (Step A) Blueprint Purpose Statement (Step B) Core Team Commitment Agreement (Step C)	Record of Decision for Business Area to Blueprint (Step A) Blueprint Purpose Statement (Step B) Core Team Commitment Agreement (Step C) Core Team Charter	MBT Blueprint Project Plan Template (MBT Toolkit) Core Team Charter Communications Strategy
Outputs	Core Team Charter	Communications Strategy Communications Plan	MBT Blueprint Project Plan
Who (role)	Core Team [R] Executive Sponsor [C] Enterprise Architect [Support] CPIC Coordinators/Capital Planning [I]	Core Team [R] Executive Sponsor [C] Enterprise Architect [Support]	Core Team [R] Executive Sponsor [C] Enterprise Architect [Support]
Duration (calendar days for an average project based on past projects)	30 days	25 days	20 days
Complexity			

Legend

Complexity:

Low ——————> High

Who:

R = Responsible
I = Informed
C = Consent

Keys to Success:

The role of the Enterprise Architect is to provide facilitation and support to these activities while allowing the Core Team to begin making group decisions and solidifying their group dynamic.

3. Activity Details

Activity 1 – Establish the Core Team Charter

Activity Short Description:

The Core Team needs to establish a charter to support the development of the Blueprint. The Blueprint's development should be treated as a project management effort. The charter establishes the legitimacy of the project, the role of its players, operational ground rules, and its stated objectives and goals. These are critical decisions in the lifecycle of a project where project criteria like scope and objectives need to be thoroughly defined and understood.

Activity Tasks:

1. Establish time table for Project Charter completion and approval
2. Create draft charter using MBT Toolkit Template for Project Charter
3. Incorporate Core Team composition, Blueprint Purpose and background, Record of Decision (ROD) and ROD background information
4. Develop project management structure
5. Establish decision making rules for team
6. Review and approve Project Charter
7. Get Executive Sponsor signature and endorsement
8. Publish Project Charter

Activity Communications Considerations:

The charter development and its timetable need to be communicated effectively within the Core Team and the executive sponsor.   Charters are often difficult to bring to closure and can cause delays in getting the project going. The effort needs to aggressively pursue the approval of the charter with the executive sponsors, Core Team and support staff, by timely and proactive identification and resolution of issues.

The completed and approved charter with its scope and objectives should be communicated to the governance community and executive management to ensure the initial purpose will be addressed by the scope and objectives.

Activity Work Products and Templates:

Blueprint Core Team Charter Template: Template for a Blueprint Core Team Charter

- **TEMPLATE:** Link to Core Team Charter Template (MS Word Format)

Activity 2 – Establish the communications strategy for the Blueprint

Successful Blueprint communication requires the development of two supporting products. A communication strategy and a supporting plan to execute the strategy. The strategy work product uses the Blueprint Purpose Statement, knowledge of the existing organization and ongoing organizational activities to identify the classes of stakeholders who will be influenced by the effort. It develops the necessary value-based messages for the respective class of stakeholders. As an integral part of its strategy, the project should establish a web site to facilitate barrier-less information dissemination. The

supporting plan addresses the necessary targeting, (stakeholder, timing and delivery means) of the value message. This targeting should orchestrate with existing organizational, informational channels, behaviors, calendars and events to optimize reach and usefulness. Examples of key organizational events would be annual workshops, collaborative forums, Communities of Practice or Interest (COP, COI), annual budget cycle, field season, and so forth. The plan should identify the optimal formats, delivery mechanisms (email, brochure, presentations, and web) to sustain effective communications.

Activity Tasks:

1. Develop Communication Strategy
2. Identify the classes of stakeholders and key messages for the project
3. Develop the project's communication plan
4. Identify related key events and activities related to each stakeholder
5. Outreach to COI and COPs to establish communication points of contact
6. Customize messages for project status and stakeholders
7. Implement the Project Web Site
8. Execute Communication Plan continuously

Activity Communications Considerations:

In enterprise transformation efforts, it is important that the affected stakeholders be aware of the potential changes like new business processes, and changes in organizational relationships or policy as early as possible. Successful transformation relies on clearly defined, transparent objectives and enterprise goals with strong supporting communications to attain organizational buy-in. Communication should be treated as a continuous activity whose benefits are to be measured in the long term during acceptance of a project's recommendations. As stakeholders begin to provide feedback into ongoing activities, it is important to log the communications and resolve and respond as resources permit.

Activity Work Products and Templates:

Communications Strategy: This product identifies the key classes of stakeholders and the strategic messages that need to express the value of the project to the organization.

- **TEMPLATE :** Link to Communications Strategy Template (MS Word format)

Communications Plan: The plan takes the strategy and puts the strategy into an actionable set of activities. These activities should be integrated into the overall MBT schedule.

- **TEMPLATE :** Link to Communications Plan Template (MS Excel Format)

Activity 3 – Establish the project plan for the Blueprint

Activity Short Description:

The blueprint project will require the development and maintenance of a project plan. Blueprint project efforts can take between six to nine months and involve dozens of participants from executive managers to subject matter experts. The blueprint plan template, a part of the MBT toolkit, identifies the necessary activities, their sequence and associated deliverables. The creation of the project plan requires having the Core Team and executive sponsorship established. In addition to the plan, the project should establish a collaborative site to manage the development and review of work products and final deliverables.

Activity Tasks:

1. Review blueprint project plan template.

    a. Review blueprint sample work products

    b. Assess the Enterprise Architecture (EA) Repository for availability and quality of existing information for the blueprint business area to determine level of data collection effort. Use the reporting web site to access reports.

2. Establish Resource Requirements

3. Establish Collaborative Work Area

    a. Establish document approval process and document management rules

    b. Create role based access for document approval process

    c. Establish communication information for key participants including email, phone

4. Develop background knowledge

    a. Assess the CPIC Databases for related investments

    b. Assess and organize the relevant information from the following areas: Performance Accountability Report (PAR), Program Assessment Rating Tool (PART), GAO reports, E-gov, Security, HR related efforts, and external agencies related architectures.

    c. Identify and assess other ongoing transformation initiatives (other blueprint projects, business re-engineering) for relevance to blueprint project

5. Build Project Resource

    a. Establish resource availability and projected roles

    b. Identify external technical experts if required

    c. Identify Subject matter experts

6. Integrate CPIC and Governance Calendars into Blueprint Project Plan

7. Integrate Communications Plan into Blueprint Project Plan

8. Identify resource and schedule risks.

9. Build out resource loaded Blueprint plan

10. Publish Plan for Review by Core Team

11. Publish approved plan into DOI Enterprise Transition Plan (MS Server version of Project)

Activity Communications Considerations:

Keep the established stakeholders informed with the projected status of the project plan key milestones.

Activity Work Products and Templates:

MBT Blueprint Project Plan: The blueprint project plan should contain all the necessary activities, dependencies, resources and deliverables to support the successful development of the blueprint.

- **TEMPLATE :** Link to MBT Blueprint Project Plan Template (Zip file containing MS Project and Adobe Acrobat formats)

4. Step References

Not Applicable.