



Client Enrichment Series

Introduction to Project Management Practices

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Agenda

- Importance of Project Management
- Project Initiation
- Communications
- Requirements Development
- Schedule Management
- Project Close-Out
- Wrap Up

Importance of Project Management

PBS Mission

To promote effective, mobile, sustainable workplace solutions for federal agencies at best value for the American taxpayer

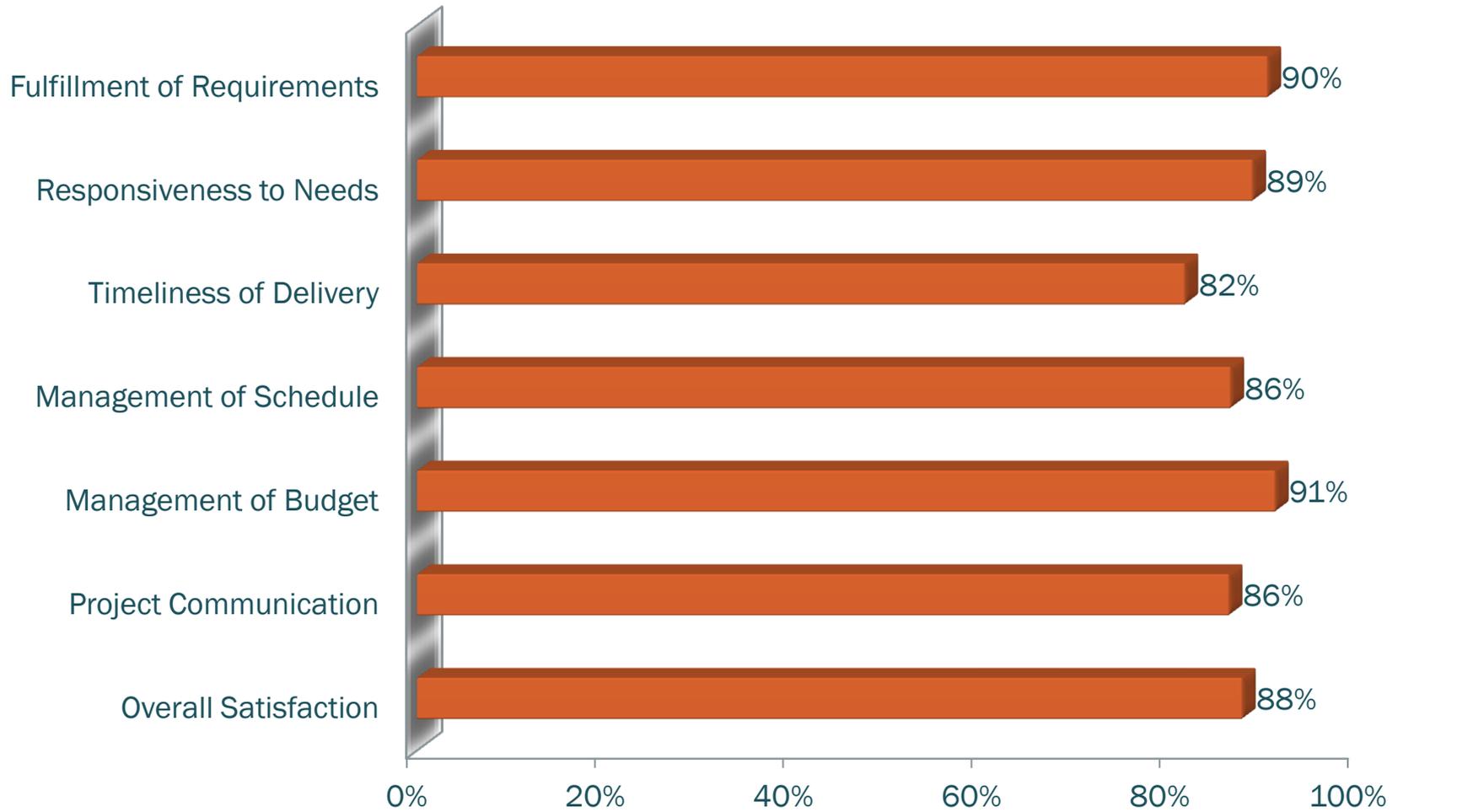
PBS's emphasis on Project Management practices:

1. Trained, skilled, and experienced employees lead project teams
2. Leverage expertise to improve project delivery
3. Mission focus through Project Management industry best practices

Results

Solutions that meet our clients needs and exceeds their expectations

FY13 Client Transaction Survey Results



Client Transaction Survey - You Told Us...

The Good

“...Other project managers could learn from the **customer service** provided by him.”

“...There was an **excellent communication** with the project manager.”

“...(He) did an **excellent job** and was outstanding. He went beyond my expectations.”

The Bad

“...There could be **better coordination** by the Project Manager.”

“...They did not **close out** some items. GSA has a local service center that has been getting a lot of unresolved items. There was **miscommunication** among GSA and PBS.”

“...It's about their **time limits**. PBS is **very slow**. They should have better customer services and they need to respond a lot quicker.”

The Ugly

“...They could have **communicated** better with me and my staff. They should be honest about **time frames**, meet their own internal time and deliver what they promise.”

“...They should meet their **own internal time**. They failed miserably.”

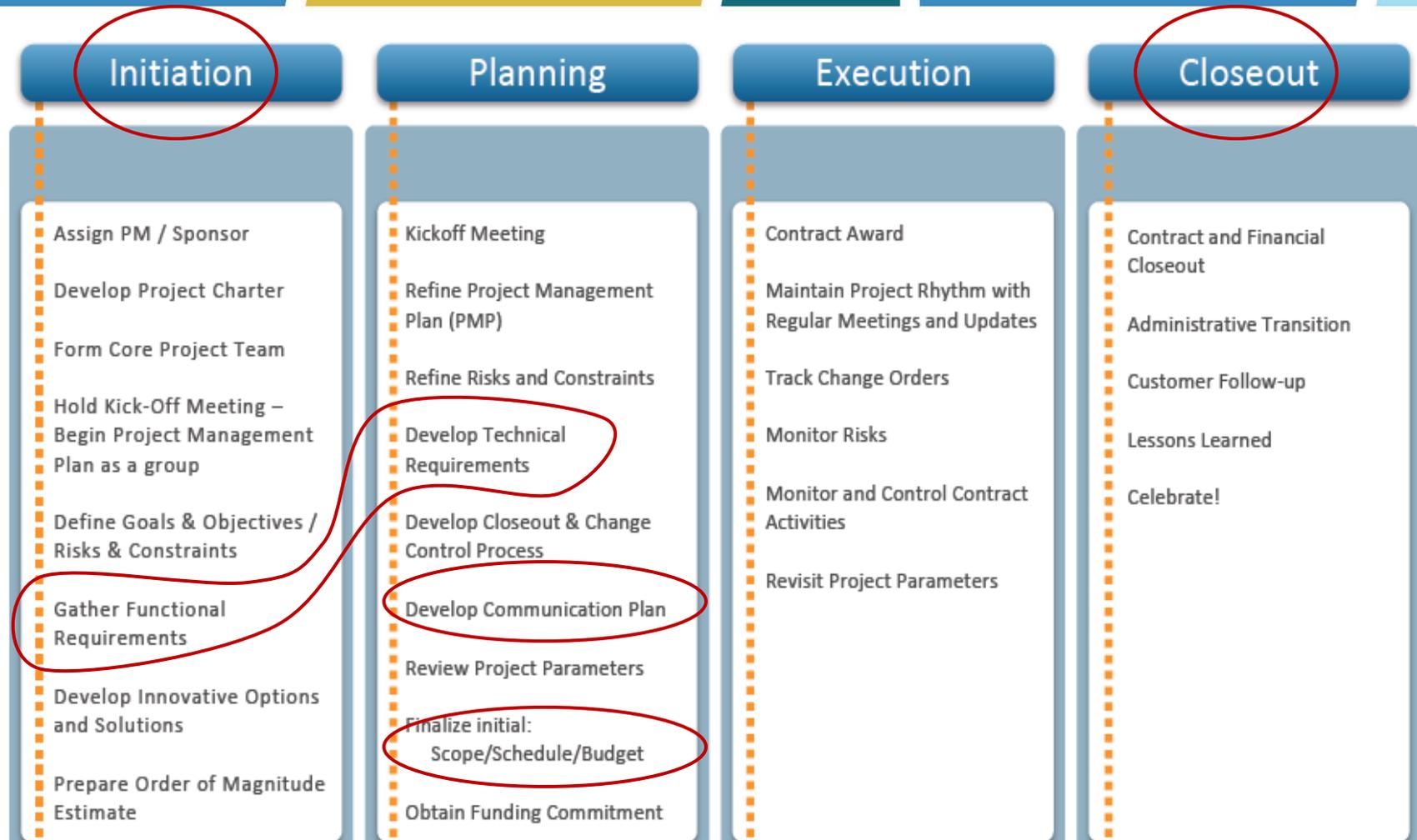
“...It's because of the lack of **communication** and **schedule** management. It is frustrating. We could have done the project faster and better elsewhere.”

Project Challenges - Recurring Themes

- Inconsistent communication
- Inconsistent levels of service delivery
- Personnel Changes
- Unrealistic schedules
- Takes too long
- Surprises
- Over budget
- Requirements not met
- Poor client experience



Project Lifecycle



Project Initiation

Challenges

- Poor project start-up
- RWA requests not responded to timely
- Delay in working on Expiring Leases, Assignments & Occupancy Agreements

Improvement Strategies

- Project Manager assignment earlier & based on best fit
- Role delineation on lease projects
- Project Manager Skills Assessment & Registry
- Core team formed early
- No intentional hand-offs throughout project

Project Initiation – What You Can Expect

- Early and often notification of lease expiration – 18 to 36 months – depending on size/complexity
- Acknowledgement of RWA requests back to client within 5 business days
- Earlier engagement by project manager & project team
- Increase time available options analysis prior to requirements development
- A primary point of contact through life of project & no “intentional” hand-offs during project

Project Communication

Challenges

- Phone calls and emails not returned, Lack of follow-up
- Surprises – bad news shared after it is too late
- Information provided on a “need to know” basis only
- Different stories from different GSA team members

Improvement Strategies

- Email and voicemail communication protocols
- Project communication plans tailored to meet client needs
- Regular project meetings, project updates
- Proactive stakeholder communication
- Identify key decision makers on project – GSA and client
- Escalation & recovery strategies defined early

Project Communication – What You Can Expect

- Return phone calls and emails within 24 hours
- Out of office reply to email and alternative point of contact provided
- Communication plan tailored to meet your needs by project
- “How do you want to be communicated with on this project?”
- Early communication of projects risks and challenges
- “How are we doing?” – from PM & project team
- Project supervisor engagement – “How are we doing?”

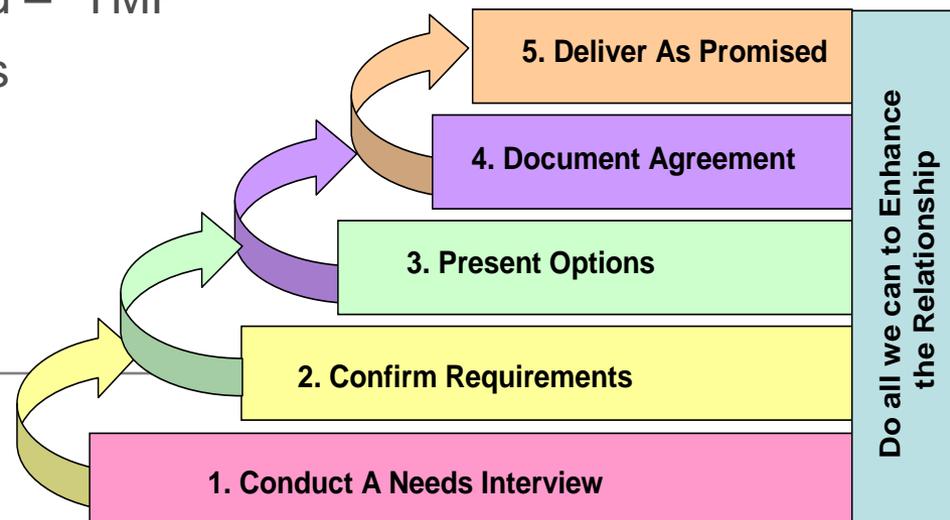
Requirements Development

Challenges

- Order taking vs. developing requirements
- Rushing through requirements development
- Failure to bring in right expertise early on
- Misalignment between scope, schedule and budget

Improvement Strategies

- Earlier project initiation
- Requirements Development Method – “TMP”
- Work+Place PMO tools & resources
- Alternative workplace strategies
- Improved cost estimating standards



Requirements Development – What You Can Expect

- Earlier engagement by project team with client
- Initial needs interview to understand underlying needs, problems, drivers for project
- Bring in-house or outside experts/consultants to the table
- Explore options with you before finalizing a solution
- Confirm project scope, schedule & budget in a documented agreement (RWA or Occupancy Agreement)
- Updated and refined estimates as requirements are defined

Schedule Management

Schedule Challenges

- Simple milestones used rather than detailed, task level schedule
- Unrealistic or overly optimistic
- Task durations not accurately estimated
- Not tailored to meet your needs

Improvement Strategies

- Scheduling training delivered
- Scheduling guide & standards developed
- Scheduling templates established
- Project cycle time measured

Schedule Management – What You Can Expect

- Every project is required to have a task level schedule
- Durations within the schedule are realistic
- Project manager is required to work with the client to develop the schedule
- Key milestones are agreed upon with PM and client
- Critical path tasks and float time are identified in the schedule and explained to client
- Schedules include key activities performed by client

Project Closeout

Challenges

- Lack of planning for key details during and after move in
- Lack of follow up after substantial completion or beneficial occupancy
- Key project information not transferred to facilities
- RWA's left open tying up unused funds

Improvement Strategies

- Comprehensive closeout planning tools developed
 - Ensure clients needs are anticipated
 - Ensure the right people involved in closeout
 - Post project follow up meetings or check-in with clients
 - Timely return of RWA funds
- Client transaction survey redesign
- Lessons learned completed & documented

Project Closeout – What You Can Expect

- Comprehensive task level schedule or plan identifying all closeout activities
- Client transition requirements included in closeout planning
 - Move coordination, furniture, IT, access to space, etc
- Timely closeout and return of RWA funds
- Follow up by project team and/or facilities staff post project
- Request for feedback on how we did by Project Manager, Project Sponsor, and/or formal survey
- Lessons learned discussion with project team
 - For more complex projects
- Smoother transition, less disruption, less down time to client

Client Transaction Survey Redesign

- Expand client project surveyed
- Improve timeliness of survey
- Improve survey delivery mechanism (on line)
- Client input sought

What about timeliness of delivery?

- Initiate projects earlier +
 - Ensure open lines of communication +
 - Matching requirements to needs +
 - Accurate, task level scheduling +
 - Comprehensive closeout & transition +
- = Improved management of client expectations**



Questions?

Contact Information

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Thank you for joining us today for a discussion on
Introduction to Project Management Practices

- **Future sessions**

- May 15, 2014: Introduction to eRETA and VCSS Updates
- June 19, 2014: Introduction to Federal Acquisition Service (FAS)

www.gsa.gov/ces

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