# Five Steps to a Successful Project

**Bill Ruck, Principal Engineer**
**Marianne Wolf, Communications Consultant**

CSI TELECOMMUNICATIONS, INC.
750 BATTERY ST., SUITE 350
SAN FRANCISCO, CA 94111



(c) 2014 CSI Telecommunications, Inc.

# Step One: Needs Assessment

- Every project needs a roadmap with clearly defined goals that should remain constant throughout the project.
- A project is successful when the needs of the stakeholders have been met. A stakeholder is anybody directly or indirectly impacted by the project.
- The Needs Assessment becomes the foundation for the entire project.
- Project Acceptance Testing will be developed based on the Needs Assessment.



(c) 2014 CSI Telecommunications, Inc.

# Step One: Needs Assessment

- Once you identify your stakeholders, find out their needs:
  - Conduct interviews
  - Identify “Needs” vs. “Wants”
  - State needs in plain language; no technology terms or specific manufacturer / model
  - Prioritize the list of needs
  - Use the list to create a set of Project Goals
- Balancing your project needs against desired wants versus budgetary constraints is a complex process that can involve mediation and evaluation of cost trade-offs in order to reach a consensus of the stakeholders for the project scope.



(c) 2014 CSI Telecommunications, Inc.

# Step One: Needs Assessment

- BUDGET
  - Some projects have predetermined budgetary limits
  - Most project budgets, particularly large capital projects, will be developed through the planning process
  - Prior to project implementation, a budget estimate will be finalized by the Project Manager and submitted to the Project Sponsor(s) for approval in order to move forward with the project.



(c) 2014 CSI Telecommunications, Inc.

# Step Two: Plan Development

- Once you have established a clear set of project goals:
  - Select Project Manager and Team Members
    - Members should have a vested interest in the outcome and be able to bring functional and practical expertise to the project.
    - Obtain commitments from the project sponsor(s) for member participation for the duration of the project.



(c) 2014 CSI Telecommunications, Inc.

# Step Two: Plan Development

- Create a list of all deliverables
- Develop a Project Plan to include:
  - Tasks to be carried out for each deliverable
  - Approximate time required to complete each task
  - The team member/resource who will carry out each task
- Develop Project Milestones based on the schedule for deliverables
- Establish project reporting guidelines (daily, weekly, or monthly); method of reporting and team meeting schedules



(c) 2014 CSI Telecommunications, Inc.

# Step Two: Plan Development

- Identify Project Risk
  - Time and cost estimates too optimistic
  - Stakeholders adding/changing requirements after the project has started
  - Lack of resource commitment
  - Unexpected budget cuts

- Discuss alternatives available to address those risks:
  - What if new requirements are added to the project?
  - Renegotiating deadlines (project delays)?
  - Adding resources (increased costs)?
  - Reducing the project scope (less delivered)?



(c) 2014 CSI Telecommunications, Inc.

# Step Two: Plan Development

CONCEPTUAL DESIGN

•The conceptual design transfers the list of deliverables identified through the Needs Assessment into plans, drawings and specifications

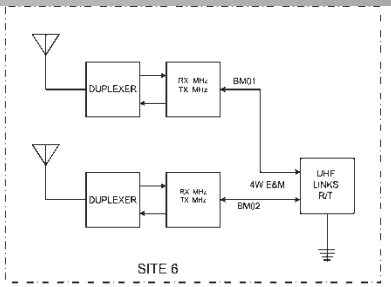
•These plans, drawings and specifications are shared with stakeholders to confirm all needs and functions have been identified

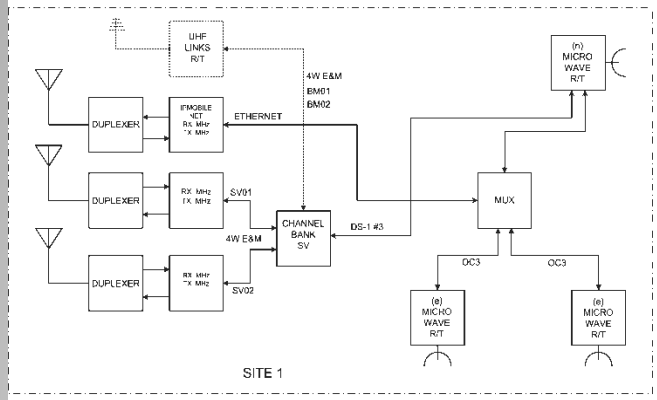
•The conceptual design is then shared with vendors in order to develop budgetary estimates for products, labor and installation

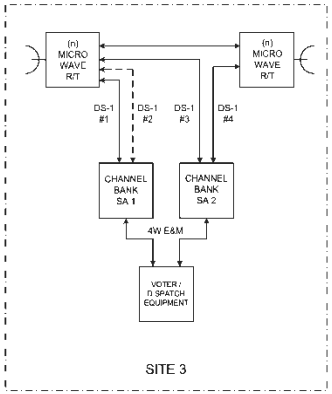


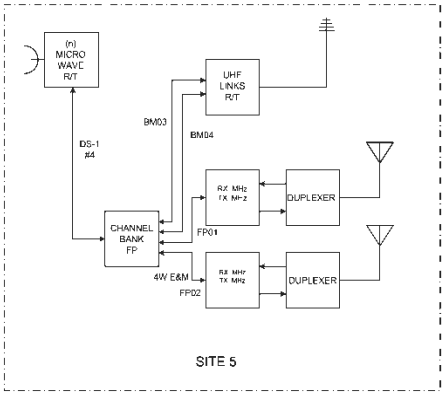
(c) 2014 CSI Telecommunications, Inc.

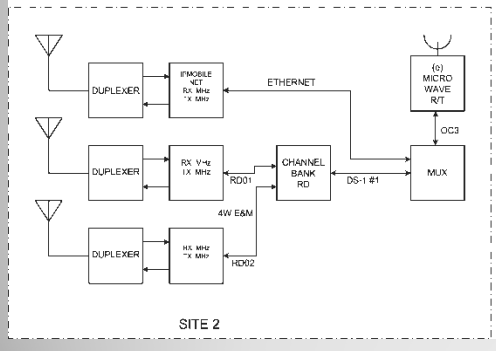
# Example of Radio System Conceptual Design

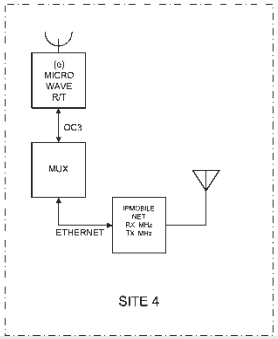



CONCEPTUAL DESIGN
NTS/DNS
CSI TELECOMMUNICATIONS, INC.



(c) 2014 CSI Telecommunications, Inc.

# Step Three: Procurement

- Develop detailed technical specifications based on the Conceptual Design
- Develop and issue Request for Proposal or Request for Bid
  - Review RFP/RFB responses for compliance with specifications
  - Conduct product demo's and site visits if applicable
  - Conduct vendor reference checks
  - Make recommendation(s) to Project Sponsor(s) for purchase
- Submit orders to vendors



(c) 2014 CSI Telecommunications, Inc.

# Step Four: Project Implementation

- "Design Freeze" : Confirm the project design, configuration, specifications with vendors in order to avoid/minimize problems or change orders as the project progresses
- Confirm product deliverables with vendors
- Update Project Schedule if needed
- Project "Kick Off" Meeting with Project Team & Vendors
  - Review roles, responsibilities and expectations with team members and vendors
  - Identify process for minimizing/mitigating problems and for keeping the project on schedule



(c) 2014 CSI Telecommunications, Inc.

# Step Five: Final Acceptance

- Create a punch list applicable to the project deliverables
  - Both Vendor and Project Manager should sign off each item on the punch list
- Witness Acceptance Testing of all equipment
- Obtain copies of all project inspections reports from County or City if applicable
- Work with vendor(s) to resolve any unsatisfactory performance issues
- Once all obligations have been met and equipment and deliverables have been accepted, submit recommendation to the Project Sponsor(s) for approval of final payments to vendors



(c) 2014 CSI Telecommunications, Inc.

# Step Five: Final Acceptance

- When the project is done, don't forget to thank:
  - Project Team Members for their time and contributions
  - Project Sponsors for their commitment and support
  - Project Stakeholders for their patience and support
  - Project Vendors for their assistance and partnership



(c) 2014 CSI Telecommunications, Inc.

# Questions ?


- Bill Ruck, Principal Engineer
  (415) 751-8845
  bruck@csitele.com

- Marianne Wolf, Communications Consultant
  (916) 531-3036
  mwolf@csitele.com

CSI TELECOMMUNICATIONS, Inc.
750 Battery Street Suite 350
San Francisco, CA 94111

www.csitele.com




(c) 2014 CSI Telecommunications, Inc.