

Consulting Project Best Practices

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What is UBC?

University Business Consulting (UBC) is an **internal Mason management consulting** practice committed to identifying and capitalizing on **opportunities for innovation**, turning data into **insights**, and **increasing efficiency** across George Mason University.

Using our **experience in higher education, project management, analytics, and strategic planning**, we work alongside our Mason clients to devise solutions that **support them in reaching their goals** across the university.

UBC is located within Operations and Business Services.

www.consulting.gmu.edu

About Me



- Joined Mason in Feb. 2020 as UBC Director
- Past experience in federal govt. consulting: led healthcare practice, \$40M annual revenue, managed 150+ team
- Expertise in strategic + operational planning, facilitation, program & project mgmt., contracting, process improvement, change mgmt.
- MPA, PMP, and this Fall joining Mason's Leadership Coaching for Organizational Well-Being cohort

AGENDA

- 01 Project Scoping
- 02 Background Research
- 03 Stakeholder Working Groups
- 04 Process Improvement
- 05 Communication & Change Management
- 06 Measuring Success
- 07 Wrap-Up & Resources

PROJECT SCOPING



Project Success Starts at the Beginning

Project Scope: The work to be accomplished during the project or engagement



Understand what you are being asked to do and produce



Clearly define what is IN scope v. OUT of scope



Set an anticipated timeframe for the project



Obtain sponsor sign-off on scope to ensure mutual understanding

Project Charter

- Helpful Components:
 - Project Objective/Goal
 - Timeline and major deliverables
 - Resources
 - Budget
 - Acceptance/Signoff
 - *May also include:* dependencies, success criteria, constraints, risks, roles and responsibilities, etc.

PROJECT CHARTER

Project Name: ARIE Project Management Support

Department/Office Name: Office for Diversity, Equity, and Inclusion

Sponsor POC: Dr. Sharnnia Artis

UBC Project Lead: Whitney Owen

Project Management Summary

Project Element	Description
Problem to Solve	The Presidential Initiative on Anti-Racism and Inclusive Excellence (ARIE) is highly complex and multi-faceted, and needs robust project management (PM) support to successfully achieve its mission and goals.
Project Objective	UBC will provide PM resources and tools to support the Vice President for Diversity, Equity, and Inclusion (DEI) and Chief Diversity Officer, Dr. Sharnnia Artis, over the next year in overseeing and executing ARIE's initiatives and objectives.
Project History	The ARIE initiative was started in 2020 by Dr. Washington to ensure that Mason creates an inclusive and equitable campus environment. There is already an established infrastructure with 10 working groups currently underway working on various programs and new initiatives. Dr. Artis is currently overseeing all of this work with the support of one part-time wage employee and needs additional assistance.
Focus of Change (Check all that apply)	<input type="checkbox"/> Business Process Redesign <input type="checkbox"/> Existing Software / System Redesign <input type="checkbox"/> New Software / System Implementation <input type="checkbox"/> Realignment of Resources / Cost Savings <input checked="" type="checkbox"/> Communication to Stakeholders <input checked="" type="checkbox"/> Other: Project Management Support
High-Level Project Workplan	<ul style="list-style-type: none"> • Summer 2022 – Meet with the DEI office to understand current state of affairs, create a project plan, set meeting cadences, create any needed reporting/communications structures, and plan for Fall 2022 working group activities.

BACKGROUND RESEARCH



Methods

UBC
background
research
includes:



Benchmarking



Literature
Review



Data
Comparison



Surveys



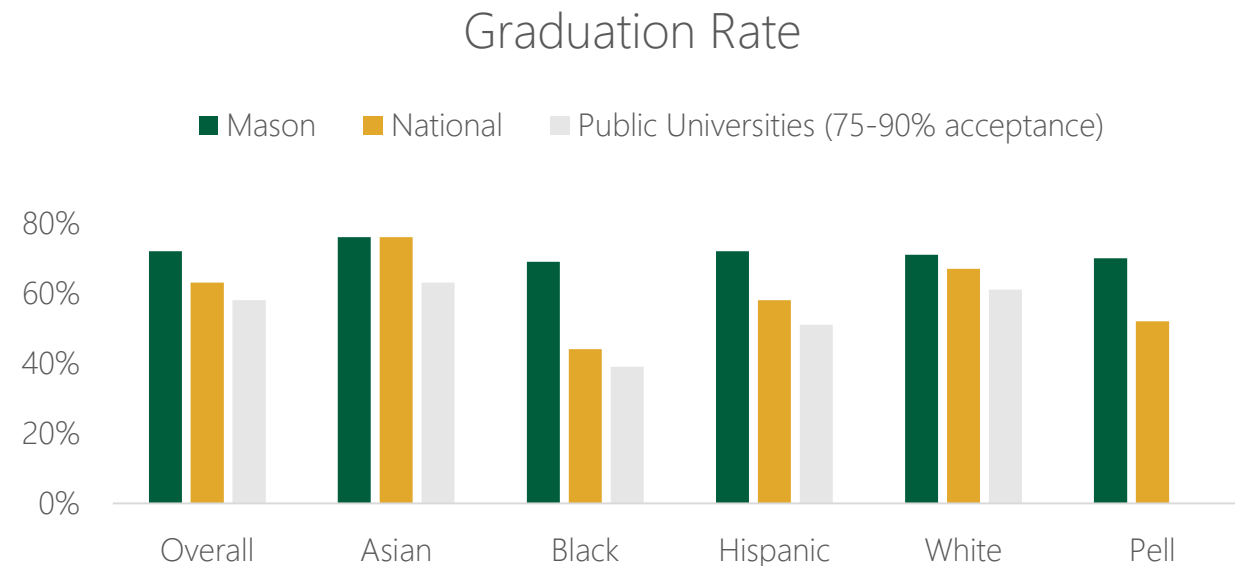
Interviews &
Focus Groups



Peer Reviews

Benchmarking, Lit Review, & Data Comparison

- Useful for comparing Mason programs or data to similar or aspirational units/schools
- Often compare against other R1, doctoral VA schools
- Ensure comparing same data parameters, e.g. UG data from same semesters



Ex. UBC Projects:

Community Policing Plan

Employee Health and Well-being Business Plan

Board of Visitors presentations



Resource: [UBC list of helpful benchmarking sites we use](#)

Surveys, Interviews, and Focus Groups

Method	Positives	Limitations	Additional Notes
Survey	<ul style="list-style-type: none"> • Great for gathering a lot of info across diverse and distributed groups • Can be implemented relatively quickly 	<ul style="list-style-type: none"> • Only know answers to what you ask, not intentions behind the answers • Can have low response rates 	<ul style="list-style-type: none"> • Design survey with the backend data computation in mind • We use Qualtrics and Microsoft Forms
Interview	<ul style="list-style-type: none"> • Can supplement survey responses to dive deeper • Allow for personal connection and feedback 	<ul style="list-style-type: none"> • One person's perception of an issue • Time-intensive process 	<ul style="list-style-type: none"> • Ensure you include a representative population
Focus Groups	<ul style="list-style-type: none"> • Also good to bolt onto surveys • Allow for interaction and shared feedback of aligned people functionally or organizationally 	<ul style="list-style-type: none"> • Also time-intensive • Ensuring one person doesn't dominate the discussion 	<ul style="list-style-type: none"> • Helpful when implementing a major change

Ex. UBC Projects:

CoA Business Processes
COVID Vaccination Status

Peer Reviews

Identify Experts

- Experts outside of Mason volunteer time to review a function or office
- Provide their expertise, SOPs, org charts, etc.

Structure Review

- Review Mason documents for background and gaps
- Conduct interviews and focus groups with leadership, staff, students

Prepare Recommendations

- Compile their findings and recommendations into final report
- UBC facilitates the process, but the report is from the experts

Ex. UBC Projects:
Facilities Peer Review
Police Peer Review

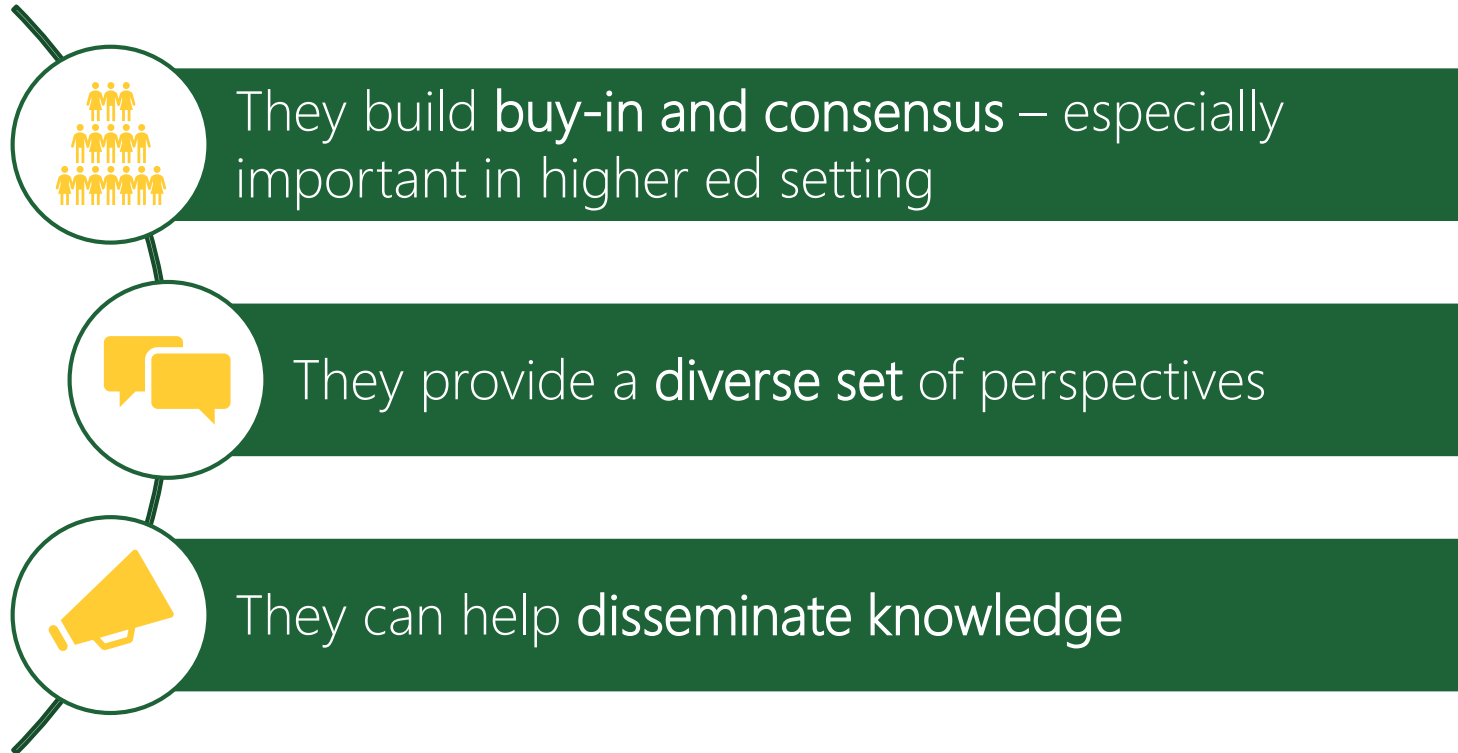
**Simplified version: UBC conducts interviews with experts and prepares report based on benchmarking and interview findings*



STAKEHOLDER WORKING GROUPS

Importance of Working Groups

Why take the time to build and facilitate Working Groups?



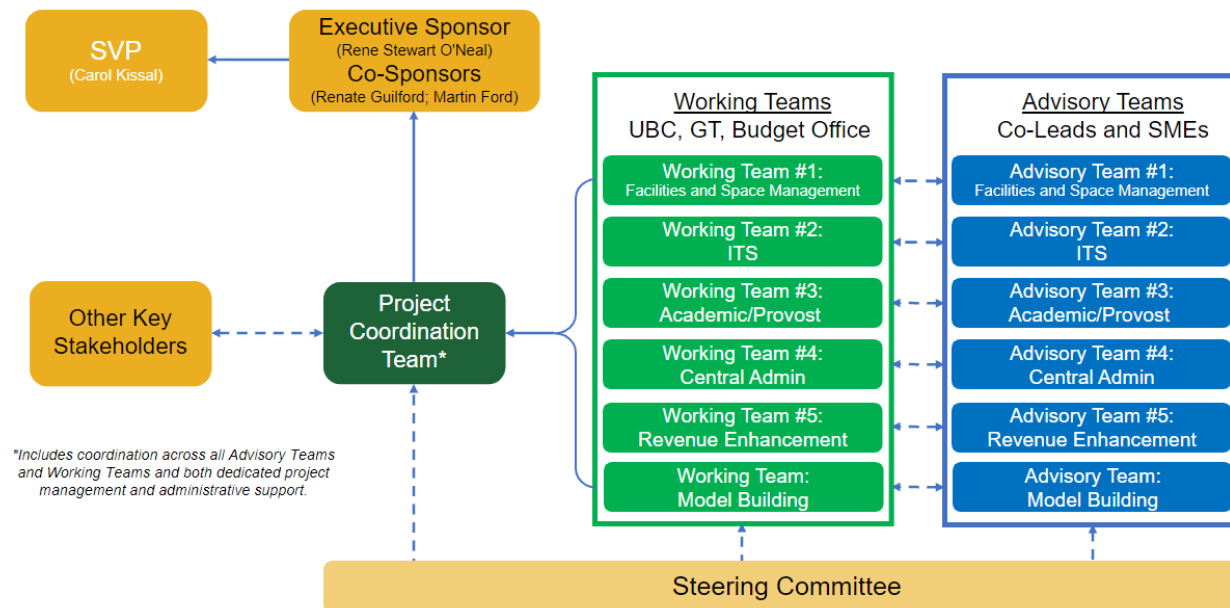
Ex. UBC Projects:

COVID Response – 21 Working Groups (!)

50th Anniversary – Tiger Teams

Assembling Working Groups

- Successful structure:
 - Larger steering committee(s) with smaller, targeted working groups



TIPS

- Use **separate facilitator(s)** (not someone who is in the group)
- Provide a **clear charter** (include mission, objective, timeline)
- Consider **who needs to be included** in the groups: someone with decision-making authority or a staff member who likely has more time to do work?



PROCESS IMPROVEMENT

Process Improvement

Process Improvement: Streamlining processes and/or removing redundancies or manual steps

Before you begin, answer:

- 1 What **question/problem** are you trying to solve? Where are your **pain points**?
- 2 Is the **cost** to improving the process **less than** potential time/money saved?
- 3 How will you **involve stakeholders** up front to help design the ideal process?

Areas where process improvement could help:

- Tasks that include many manual steps
- Repetitive tasks
- Processes with approval steps or signoffs

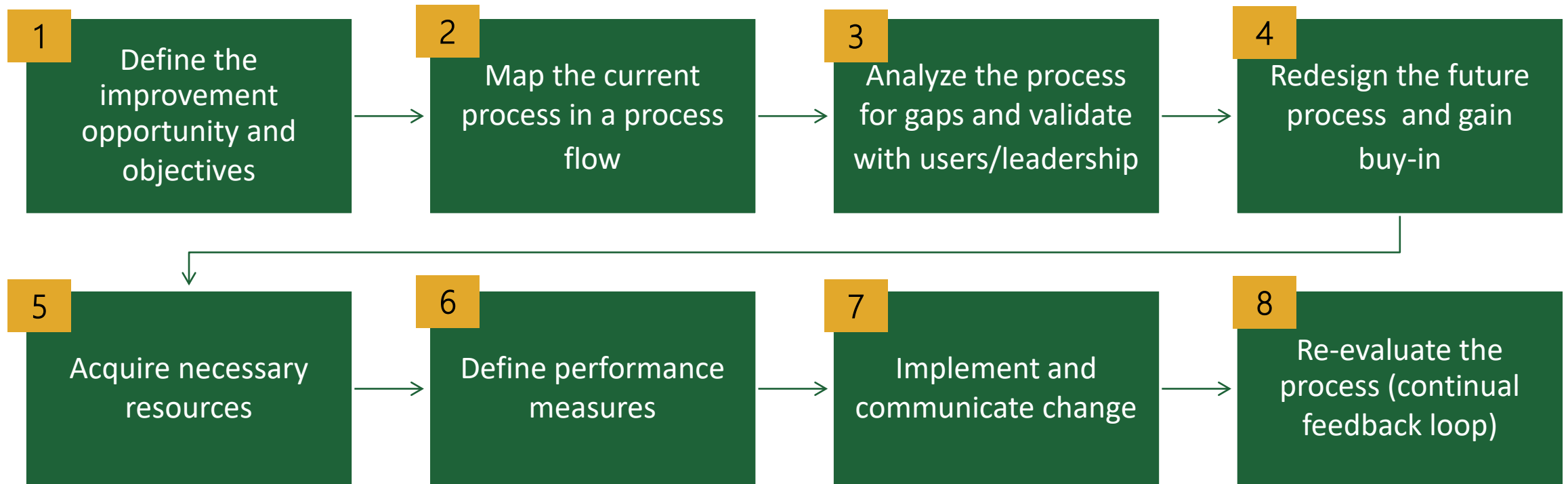
Ex. UBC Projects:

Fiscal Services process mapping
Chart of Accounts business process mapping
OBS Reconciliation process update



Resource: [UBC Business Process Toolkit & Slides](#)

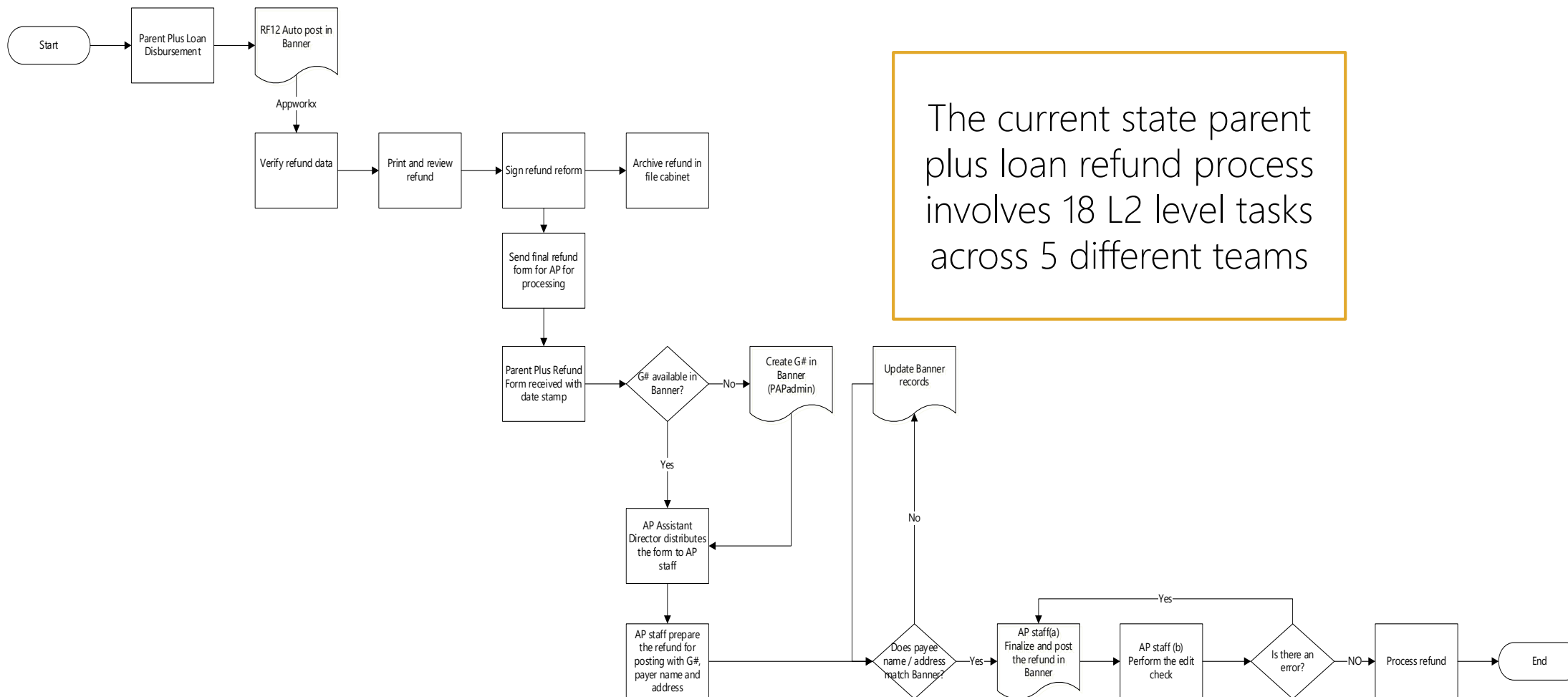
UBC Steps for Process Improvement Projects



FISCAL SERVICES PROCESS MAPPING EXAMPLE

UBC 2020 Project

Parent Plus Loan Refund – Current State Process



The current state parent plus loan refund process involves 18 L2 level tasks across 5 different teams

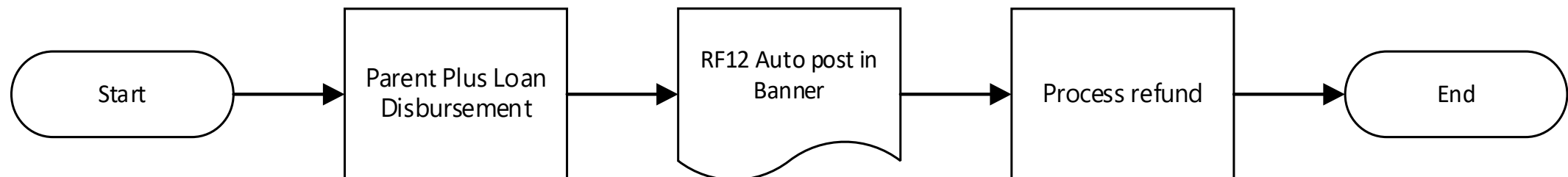
FISCAL SERVICES PROCESS MAPPING EXAMPLE

UBC 2020 Project

Parent Plus Loan Refund – Future State Process

The future state parent plus loan refund process involves 3 L2 level tasks for a single team

The future state parent plus loan refund process was fully automated using existing Banner functionality. 16 steps in the previous current state process flow were consolidated into 1 step for the future state process flow.



COMMUNICATION & CHANGE MANAGEMENT



Effective Communications



Focused Meetings

Use meeting agendas and set objectives for meetings.
Send materials in advance for review.



Repeat Your Message

People are busy – you may think you’ve said it, but they need to hear it multiple times.



Meeting Follow-Up

Send summary notes with action items and next steps up front.
Record meetings for those who miss.



Consider All Stakeholders

Not just your immediate team – leadership updates, Deans, faculty, staff, students, etc.



Non-Meeting Comms

Use Teams! Biweekly newsletters, polls, email check-ins. Include Teams links to your resources. Eliminate meetings where you can.



Make a Plan

Lay out your comms strategy, messages, cadence, etc. and FOLLOW it.

Managing Change

Keep Change Top of Mind

Think about the change at all project phases, not just the end. How can you prepare people in advance?

Ask for and Address Input

Involve stakeholders all along, but be prepared to address their feedback to increase their buy-in to the change.

Acknowledge the Discomfort

Change can be stressful. Acknowledge its impact on people and help to address their concerns.

Create a Positive Vision for the Future

People will likely support changes they can visualize achieving – create an attainable vision they can get behind and be sure to point out the *benefits to them* along the way.



MEASURING SUCCESS



SMART Goals

Specific

- ❖ State exactly what you want to accomplish
- ❖ Include the benefits to Mason, your unit of the goal

Measurable

- ❖ Quantitative or qualitative metrics for how you will measure progress or success

Achievable

- ❖ Goal should be within your capacity to achieve
- ❖ Can accomplish within known resource or timeline constraints

Relevant

- ❖ Why is this goal worthwhile for you/your unit?
- ❖ How does this goal help Mason and align with priorities?

Time-Bound

- ❖ Deadline or timeframe for accomplishing your goal

Set goals for your project that will help you ensure you achieve and can measure your desired end-state success.

Measuring Success – Smaller Projects

- Know what “done” looks like (from charter)
- Small, easily identifiable scope – can use a checklist approach
- Did you achieve project goals/benefits?
- Can self-assess, customer interviews, or surveys

Internal UBC Completed Project Review:

Project Retrospective Questions:

- Does the product delivered meet the stakeholder’s expectations?
- Did the processes associated with completing the project work meet the stakeholder’s expectations?
- Has the project/product enabled the anticipated business results/benefits?
- Were the expectations and requirements of the project / product well defined and understood on the project team? Were the requirements effectively implemented?
- Were communications about the project effective and timely? Were the appropriate communications vehicles utilized? Did communications include the appropriate content?
- How effective were the process and tools to complete project work? Were the appropriate plans in place to properly guide the project team throughout the project life cycle?
- Overall rating of the success of the project (both what was delivered, and how it was delivered).

Measuring Success – Large Projects

Large, complex projects, 6+ months or involving many units:

- Set metrics up front that are agreed upon by sponsor and key stakeholders – quantifiable if possible

Key Performance Indicators (KPIs)

- Reflect a target and performance against it; e.g., ROI, NPV*, # of new classes offered
- Usually reflect the health of an org/unit and performance against a portfolio of projects over time**
- May compare against internal or external (Governor or other school) targets

Lessons Learned

- Qualitative method for gathering feedback on project success and what can be improved upon
- Involve many stakeholders for holistic insights

*Return on Investment (ROI), Net Present Value (NPV)

**Sanchez, H. & Robert, B. (2010). Measuring portfolio strategic performance using key performance indicators. *Project Management Journal*, 41(5), 64–73.

WRAP UP & RESOURCES



Resources and Next Session

- [Benchmarking Resources Sheet](#) – Available on the UBC Site
- [UBC Business Process Guide and Toolkit Slides](#) available in MasonLeaps
- PMI.org on all topics (for Project Management Institute members)
- Feedback survey on today's presentation – we want to hear from you!

[Project Request Form](#)



Join us on August 17, 2022 at 12pm for
Facilitation Tips and Tricks

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