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# Basics of Security Project Management



# Overview of Security Project Management

## Part II to Planning, Organizing, & Controlling Resources during a Project



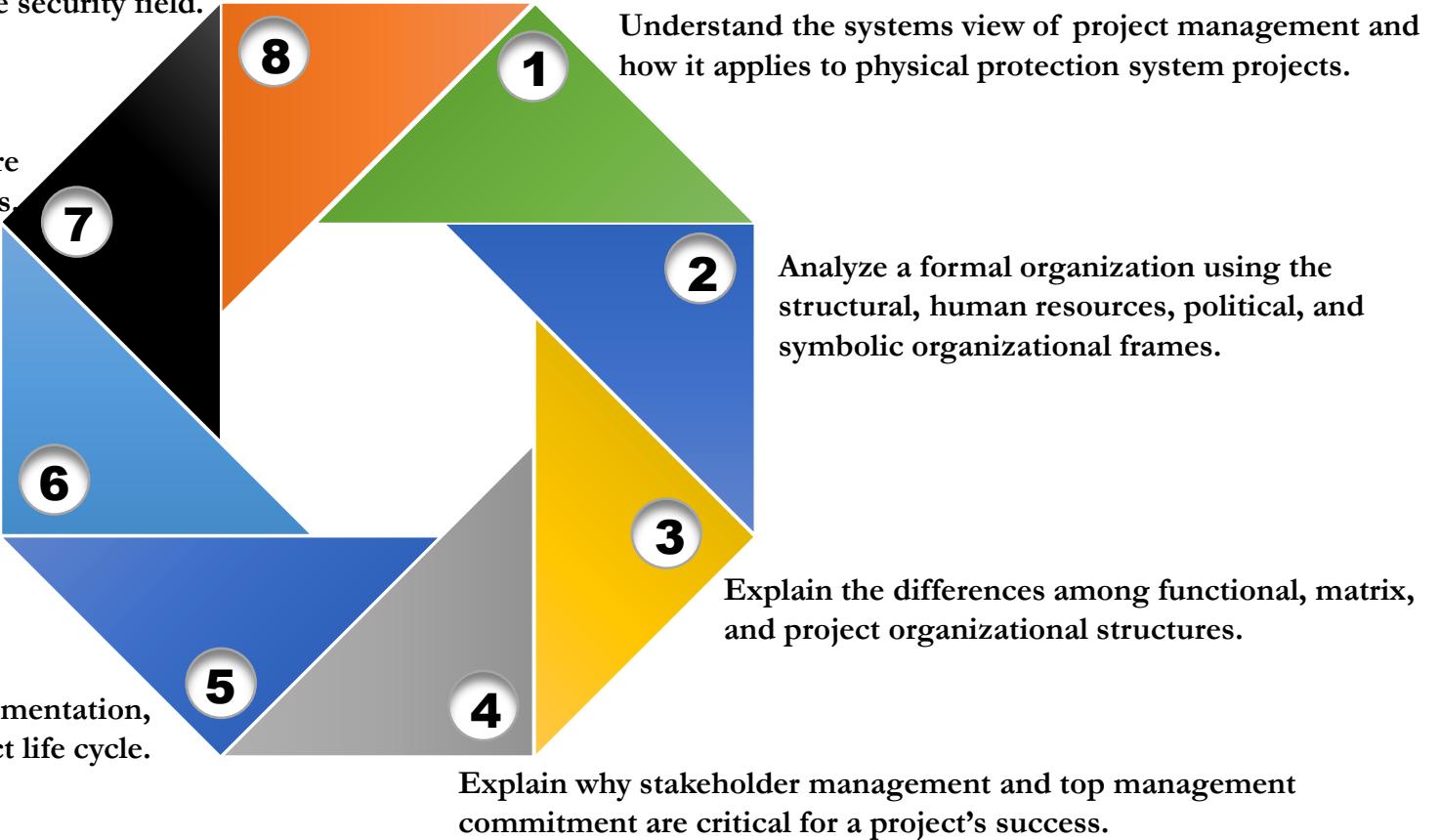
# Learning Objectives

List the skills and attributes of a good project manager in general and in the security field.

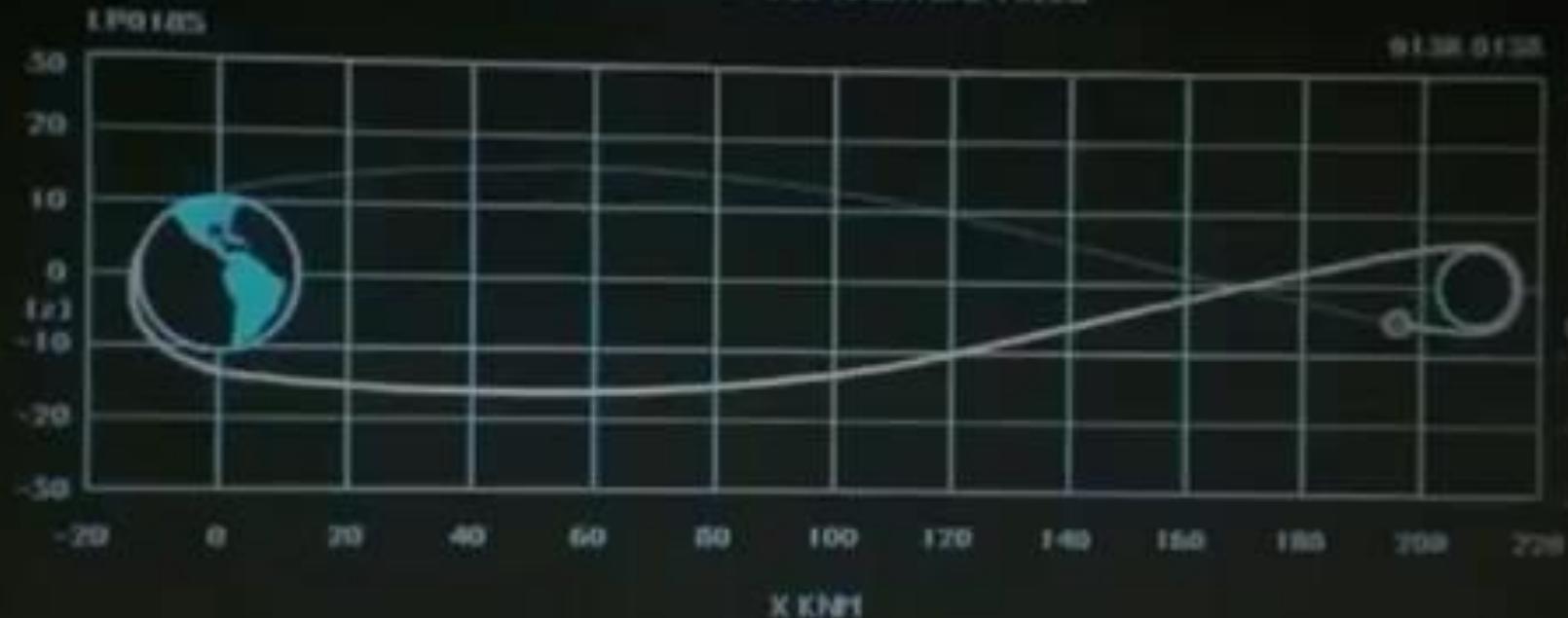
Discuss the unique attributes and diverse nature of security projects.

Distinguish between project development and product development.

Understand the concept, development, implementation, and close-out phases of the project life cycle.



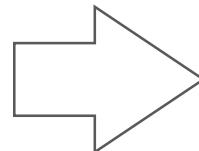
EARTH MOON TRANSIT  
DISTANCE X 1000 NAUTICAL MILES



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# Definition of a Project

- ✓ A project is a unique venture with a beginning and an end, conducted by people to meet established goals within parameters of cost, schedule, and quality
- ✓ \$145 billion/year lost due to failed projects
- ✓ Only 9% of projects for large companies come in on-time and on-budget



# What is Project Management?

**AMAP:** The ACTION of MANAGING the ACTIVITIES of PROJECTS  
to successful completion through proven processes.

- ✓ Scope of Work (SOW)
- ✓ Specified time line (Gantt Charts)
- ✓ Cost Schedule: Budget & Estimates

PROPER PROFESSIONAL PROJECT  
MANAGEMENT WILL PRODUCE  
POSITIVE UNIQUE RESULTS



Project Management Quality Triangle

# The Value of Project Management

Improved financial management.

Stopping “bad” projects more quickly.

More focus on metrics and fact-based decision making.

Improved work environment.



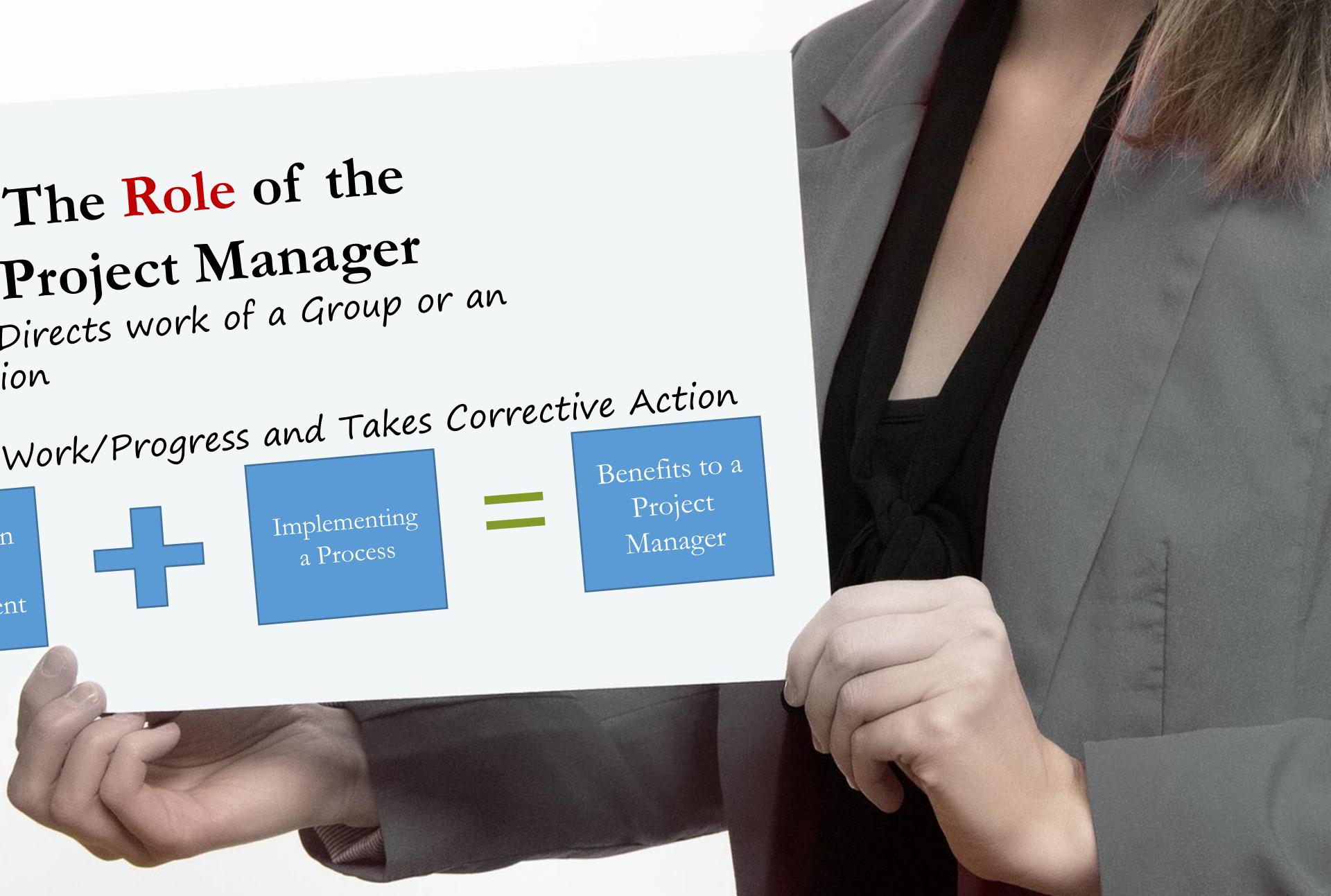
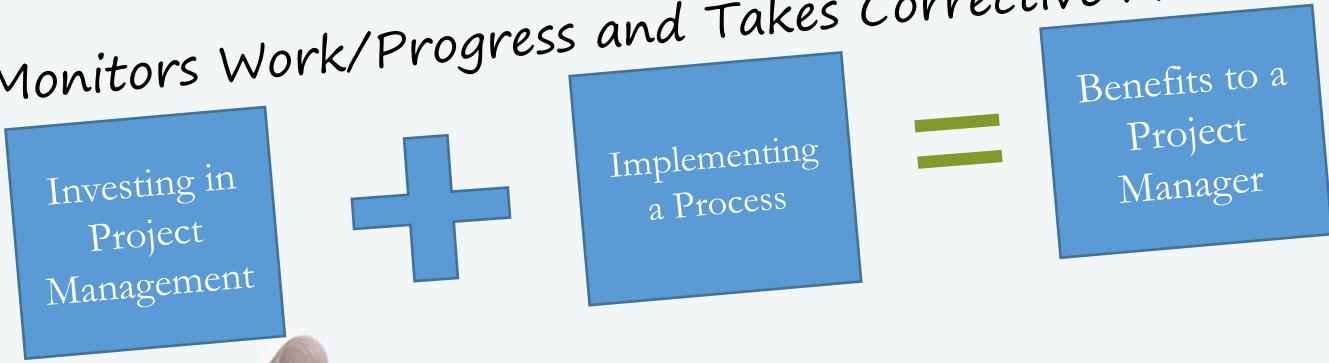


# The Practice of Project Management

- ✓ Delivers Constant results
- ✓ Reduce Costs
- ✓ Increase Efficiencies
- ✓ Improves Customer & Stakeholder Satisfaction
- ✓ Provides a Competitive Advantage

# The Role of the Project Manager

- ✓ Plan and Directs work of a Group or an Organization
- ✓ Monitors Work/Progress and Takes Corrective Action



# Benefits to Project Manager

- ✓ Clear Expectations
- ✓ Faster Execution
- ✓ Fewer Issues
- ✓ Better Decisions
- ✓ Higher Customer Satisfaction



# Process to Value PM

- ✓ Discuss their Pain Points
- ✓ Qualify the Cost of Time, Money, & Effort
- ✓ Propose – How would it be if...we could Improve, Increase or Decrease something based on Discovery.
- ✓ Let them have input into the process and make it simple, easy, fast to get to.



Project management is the mixture of people, systems, and techniques required to carry the project to successful completion.



## Successful Project

### Attributes

- Timeliness
- On - Budget
- Objectives met
- Contributed to mission
- Consistent involvement of the end users
- Executive management support
- Clear statement of objectives and



**"This project is extremely important, but it has no budget, no guidelines, no support staff and it's due tomorrow morning. At last, here's your chance to really impress everyone!"**

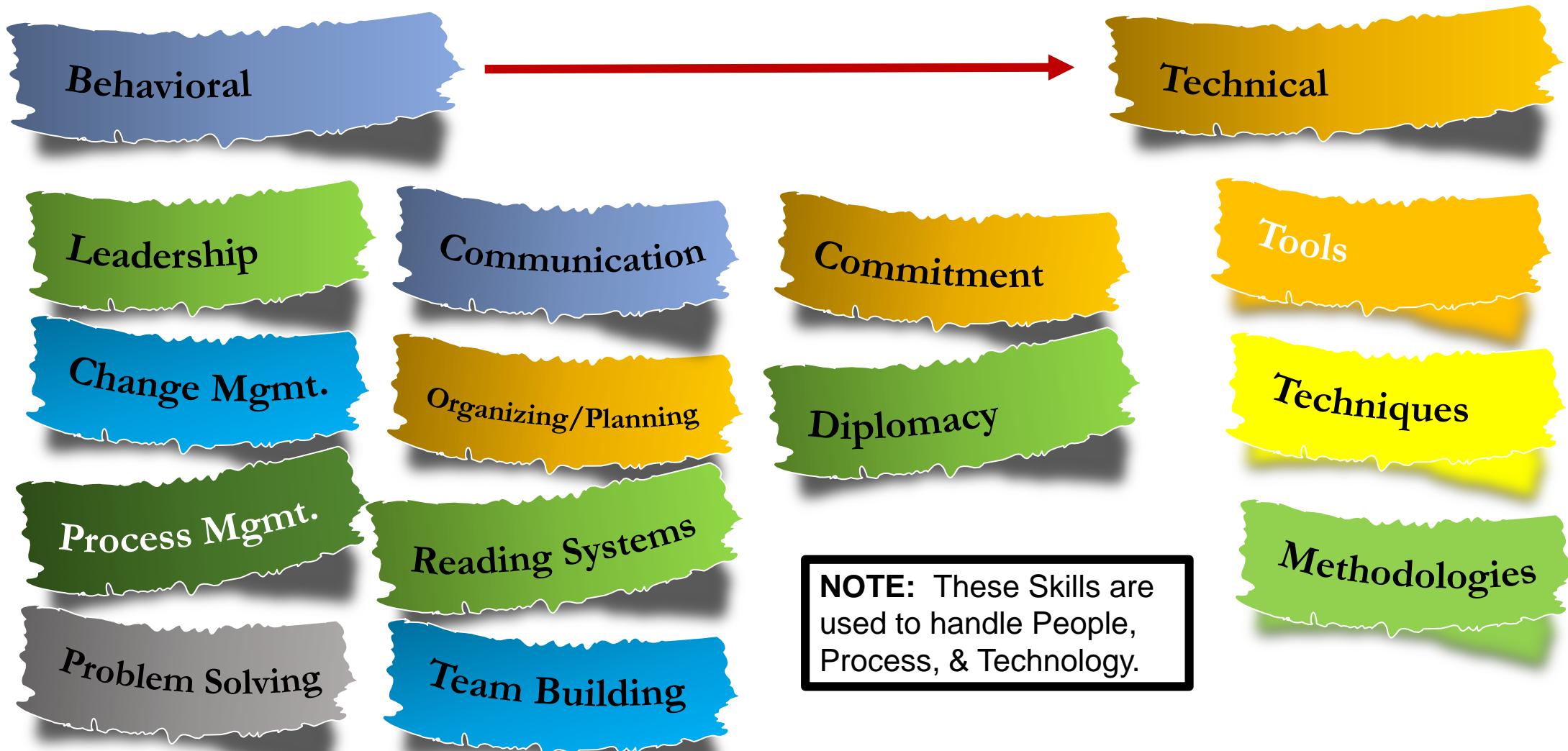
# Client's Expectation of a Security Project Manager?

**The ability to manage and coordinate:**

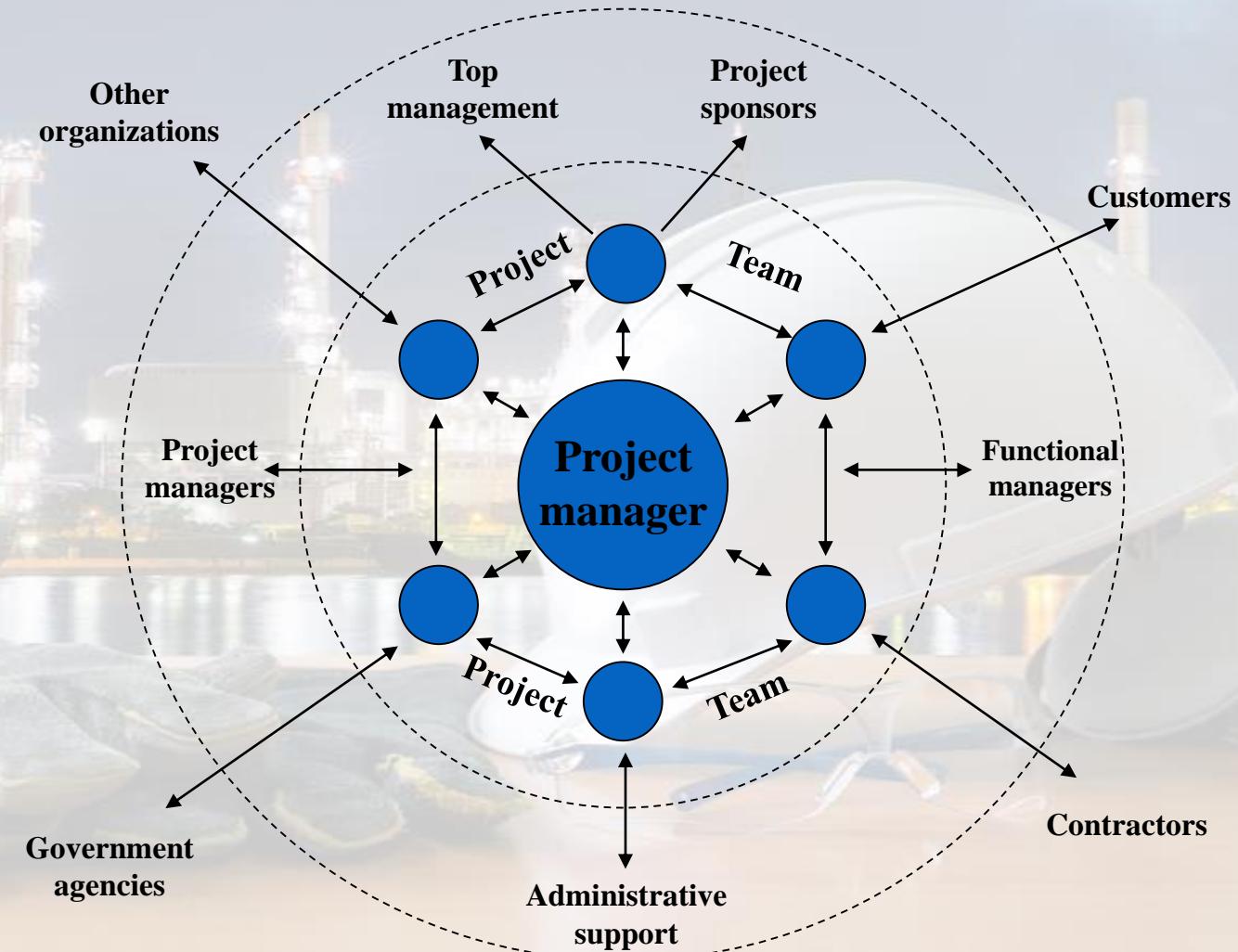
- People & project resources
- Time & Schedule Management
- Financial Management
- Risk Management
- Scope of Work (SOW)
- Changes
- Completion & Testing
- Punch List Items
- Commissioning & Turn-Over

**To be the best: Practice, Practice, Practice...**

# Skills You Need as a Project Manager



# Network of Relationships



# Commonly Traded Organizational Currencies

## Task-related currencies

Resources	Lending or giving money, budget increases, personnel, etc.
Assistance	Helping with existing projects or undertaking unwanted tasks.
Cooperation	Giving task support, providing quicker response time, or aiding implementation.
Information	Providing organizational as well as technical knowledge.

## Position-related currencies

Advancement	Giving a task or assignment that can result in promotion.
Recognition	Acknowledging effort, accomplishments, or abilities.
Visibility	Providing a chance to be known by higher-ups or significant others in the organization.
Network/contacts	Providing opportunities for linking with others.

Source: Adapted from A. R. Cohen, and David L. Bradford, *Influence without Authority* New York: John Wiley and sons, 1990). Reprinted by permission of John Wiley & Sons, Inc.

# Commonly Traded Organizational Currencies

## Inspiration-related currencies

Vision	Being involved in a task that has larger significance for the unit, organization, customer, or society.
Excellence	Having a chance to do important things really well.
Ethical correctness	Doing what is “right” by a higher standard than efficiency.

## Relationship-related currencies

Acceptance	Providing closeness and friendship.
Personal support	Giving personal and emotional backing.
Understanding	Listening to others’ concerns and issues.

## Personal-related currencies

Challenge/learning	Sharing tasks that increase skills and abilities.
Ownership/involvement	Letting others have ownership and influence.
Gratitude	Expressing appreciation.

*Source:* Adapted from A. R. Cohen, and David L. Bradford, *Influence without Authority* New York: John Wiley and sons, 1990). Reprinted by permission of John Wiley & Sons, Inc.

# Basic *Security* Project Management Duties

To insure the consistent completion of projects with:

- ✓ the highest positive impact for your company
- ✓ the greatest quality and financial integrity for your client

## WILL REQUIRE the PM to:

- Participate during the Sales Process
- Establish core process/procedures in your Company
- Project Plan: imagine devices from furthest point in
- Establish uniformity & consistency with engineered drawings
- Have teams pre-fabricate to the “Nth” degree
- Communicate with & educate all project resources
- Plan ahead, review, analyze, re-align
- General understanding of building and fire codes

# *Project Objectives – Key Points*

- ✓ Job site familiarity
- ✓ Safety concerns
- ✓ Environmental
- ✓ Following the quality control plan
- ✓ Obtaining required resources



# Application of Basic Security Project Management Skills

## Job Initiation, Planning & Familiarity:

- Job Kick-Off
- Schedule
- Resource allocation
- Scope Review
- Engineering Review
- Procurement
- Pre-Fabrication
- Site Familiarity



# *Application of Basic Security Project Management Skills*

## **Coordination, Review & Authorization, Risk Management:**

- Coordination
- PO/Contract Requirements
- Budget
- Submittals
- As Build Drawings
- Sign-Off / Approvals
- Risk Mitigation

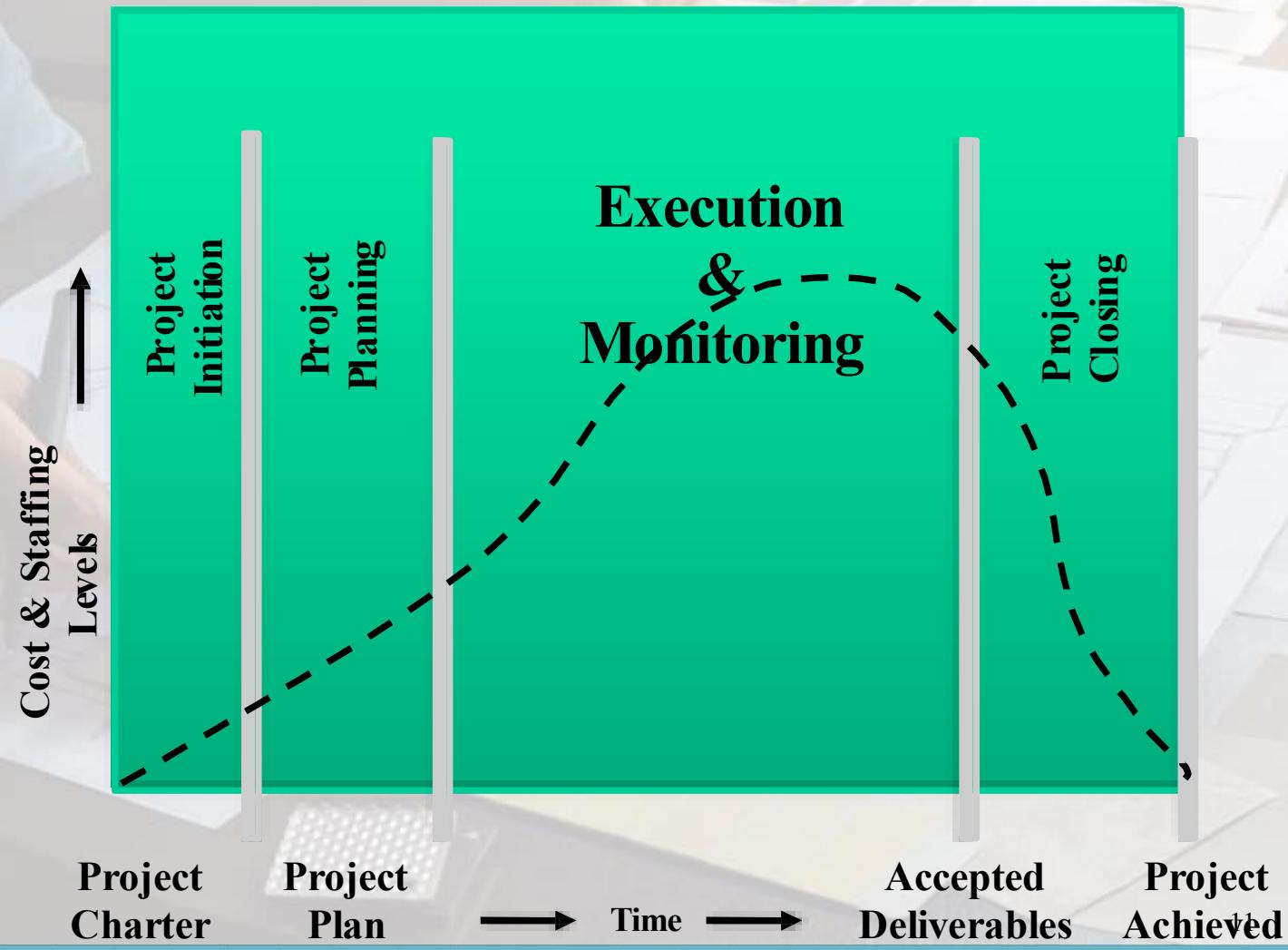
# Project Life Cycle

- Closing
- Initiation
- Planning
- Execution
- Monitoring

*Security Project Management Life Cycle*



# Project Time Requirements



# Project Initiation

Identify stakeholders, including initial members of the project implementation team

Decide that the risks associated with the project are appropriate to probable success.

Define the overall project goals.

Define the general project scope.

Recognize that a project is worth doing.

Determine what the project should accomplish.

Define general expectations of customers, management and other stakeholders, as appropriate.

Develop the Statement of Work (SOW) that documents the project's approved deliverables and operational guidelines.

# Project Initiation

## Activities & Deliverables



# Project Planning

## Activities & Deliverables

- ✓ Threat Assessment
- ✓ Vulnerability Analysis
- ✓ Recommend Safeguards
- ✓ PPS Requirements Documents
- ✓ Project Scope Document
- ✓ Procurement Approach
- ✓ Sole Source Justification
- ✓ Business Objectives
- ✓ Design Criteria
- ✓ Design Requirements
- ✓ Performance Requirements
- ✓ Capacity Requirements





# Project Planning

## Essential Project Planning Steps

Define Project Goals & Objectives

Define Scope Of Work

Define Project Execution Plan

Set Time Parameters

Develop And Finalize Budget

Define Resources Needed, Type, & When

Develop Communications Plan

Develop Project Purchasing, Billing, & Cash Flow Plan

Obtain Necessary Reviews, Authorizations

Prepare Risk Management Plan

# Project Execution

Secure necessary resources to carry out the project plan

Resolve problems that arise during a project

Communicate with stakeholders

Meet with team members

Lead the team

1

2

3

4

5

*Activities & Deliverables*

# Project Monitoring & Control

Document and gain approval for all changes to plans and specifications to avoid nasty surprises and a less-than-ideal project outcome.

Return to the planning stage to make adjustments to the plan, when necessary.

Change the project scope to meet project goals (when appropriate).

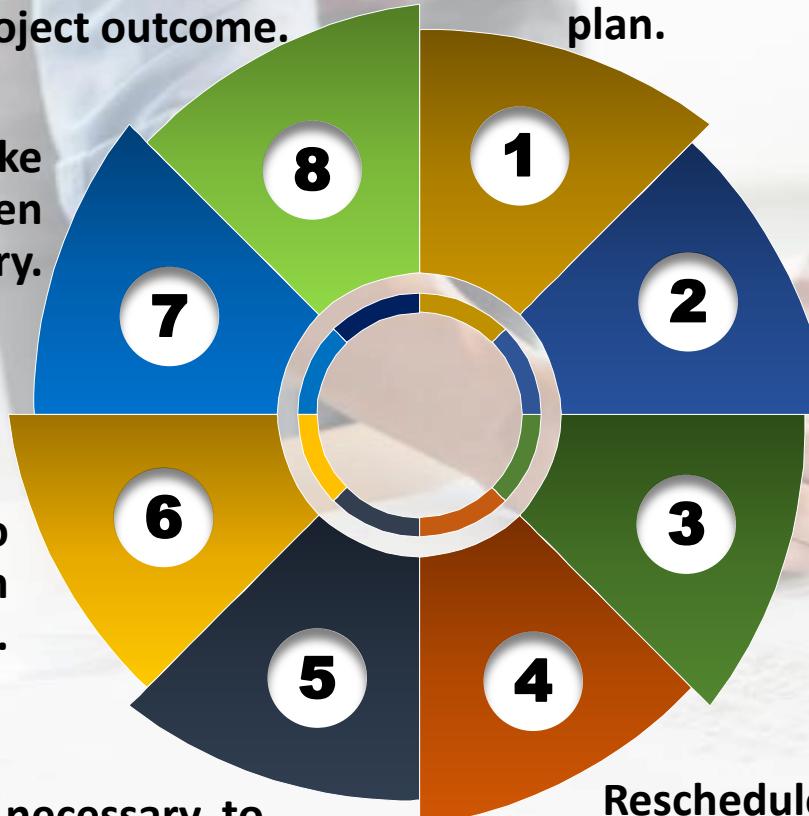
Adapt resource levels, as necessary, to achieve on-time delivery of project outcomes.

Monitor project progress and deviation from the project plan.

Take corrective action to handle day-to-day problems and difficulties.

Receive and evaluate project changes requested from stakeholders and team members

Reschedule the project, if necessary, to meet resource or outcome restraints.



# Project Closing



## NOTE:

- ✓ Complete, distribute project specific documents
- ✓ Review/Approve/Close Out Project Budget Items
- ✓ Compile/Complete/Submit Final Contract Documents
- ✓ Obtain written Sign-Off



## Keys to a Successful Security Project

- ✓ Remember that people count!
- ✓ Gain the formal and ongoing support of management and stakeholders, not just ahead of time, but for every step of the project.
- ✓ Be willing to change.
- ✓ Keep people informed of what you're doing.
- ✓ Be ready to try new things.
- ✓ Become a project leader as well as a manager.
- ✓ Gain consensus on project outcomes.
- ✓ Build the best team you can.
- ✓ Develop a comprehensive, workable plan and keep it updated.
- ✓ Determine what you really need to get things done.
- ✓ Maintain a realistic schedule.
- ✓ Do not try to do more than can be done.



# **Initiation**

## **Part III to Planning, Organizing, & Controlling Resources during a Project**

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# GOAL



1

Understand the  
importance of the  
Initiation Stage

2

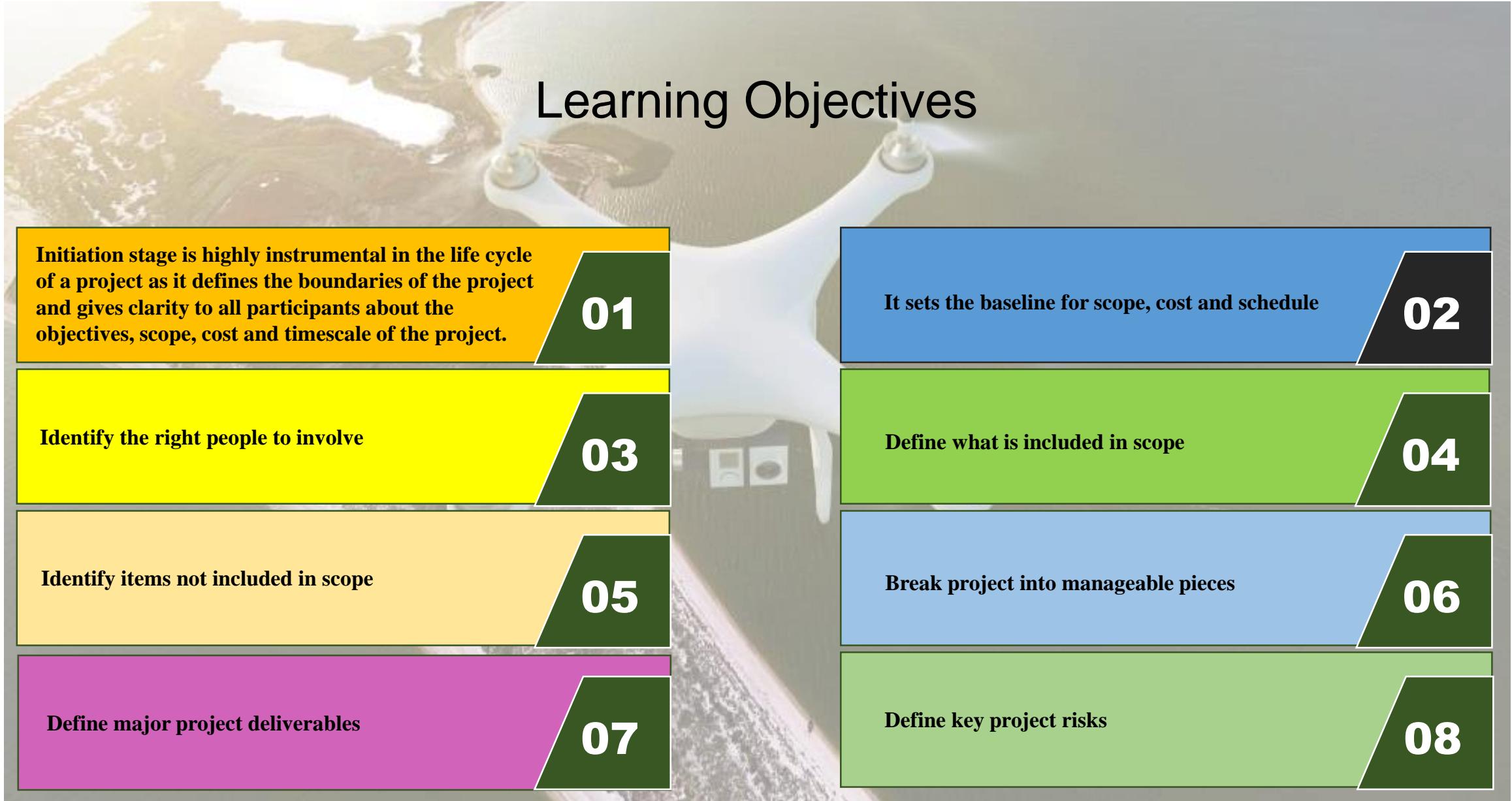
Define Key Project  
Risks

3

Compartmentalize  
while maintaining the  
overall objectives

4

Understanding Scope



# Learning Objectives

Initiation stage is highly instrumental in the life cycle of a project as it defines the boundaries of the project and gives clarity to all participants about the objectives, scope, cost and timescale of the project.

**01**

It sets the baseline for scope, cost and schedule

**02**

Identify the right people to involve

**03**

Define what is included in scope

**04**

Identify items not included in scope

**05**

Break project into manageable pieces

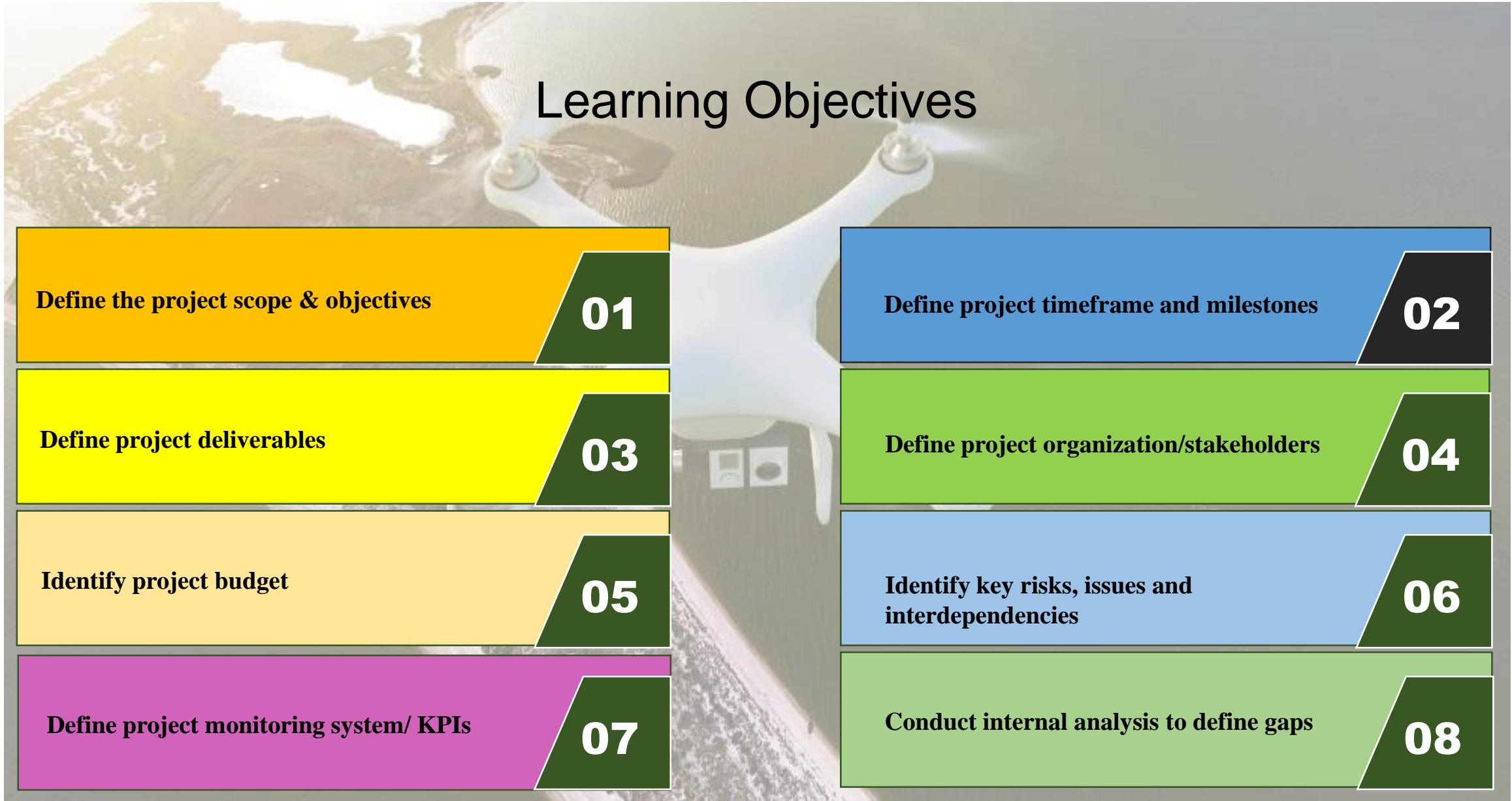
**06**

Define major project deliverables

**07**

Define key project risks

**08**



# Learning Objectives

Define the project scope & objectives

**01**

Define project deliverables

**03**

Identify project budget

**05**

Define project monitoring system/ KPIs

**07**

Define project timeframe and milestones

**02**

Define project organization/stakeholders

**04**

Identify key risks, issues and  
interdependencies

**06**

Conduct internal analysis to define gaps

**08**

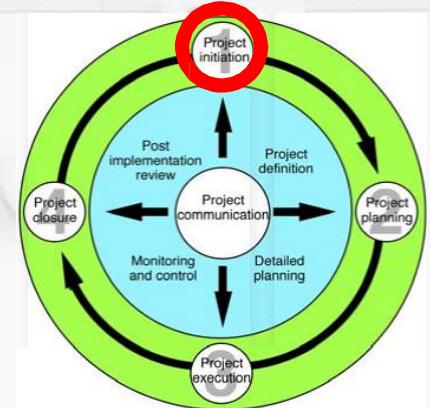


# Project Initiation

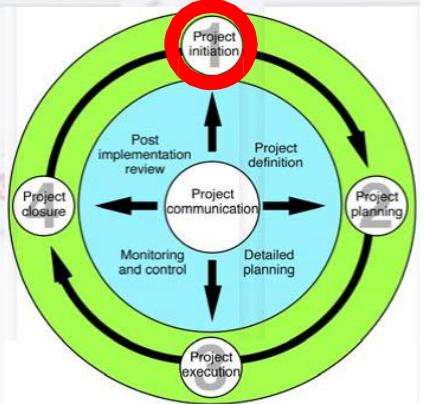
## Overview



- ✓ Initiation stage is highly instrumental in the life cycle of a project as it defines the boundaries of the project and gives clarity to all participants about the objectives, scope, cost and timescale of the project.
- ✓ It sets the baseline for scope, cost and schedule
- ✓ Identifies the right people to involve
- ✓ Defines what is included in scope
- ✓ Identifies items not included in scope
- ✓ Breaks project into manageable pieces
- ✓ Defines major project deliverables
- ✓ Define key project risks



# Objectives and Deliverables



## Objectives

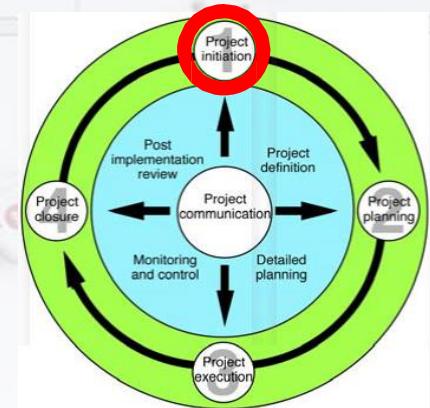
- Define the project scope & objectives
- Define project timeframe and milestones
- Define project deliverables
- Define project organization/stakeholders
- Identify project budget
- Identify key risks, issues and interdependencies
- Define project monitoring system/ KPIs
- Conduct internal analysis to define gaps

## Deliverables

- Project Charter covering:
  - Project objectives
  - Project scope
  - Project milestones and deliverables
  - Project organization / stakeholders
  - Budget approvals and resource allocation
  - Success factors, constraints, expected expenditure
  - Confirmed project manager assignment
  - Formal Steering Committee approval

# Understanding the nature of projects

## PM Knowledge Areas – Initiation Processes



### Project Integration Management

- Develop Project Charter
- Develop Project Management Plan
- Direct and Manage Project Execution
- Monitor and Control Project Work
- Perform Integrated Change Control
- Close Project or Phase

### Project Time Management

- Estimate Activity Resources
- Estimate Activity Durations
- Develop Schedule
- Control Schedule
- Define Activities
- Sequence Activities

### Project Scope Management

- Collect Requirements
- Define Scope
- Create WBS
- Verify Project Scope
- Control Project Scope

### Project Cost Management

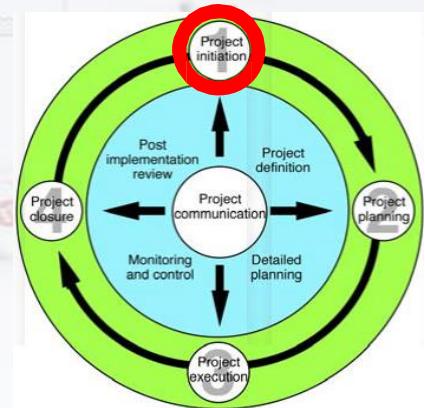
- Estimate Costs
- Determine Budget
- Control Costs

### Project Quality Management

- Plan Quality
- Perform Quality Assurance
- Perform Quality Control

# Understanding the nature of projects

## PM Knowledge Areas – Initiation Processes



### Project Human Resources Management

- Develop Human Resource Plan
- Acquire Project Team
- Develop Project Team
- Manage Project Team

### Project Risk Management

- Plan Risk Management
- Identify Risks
- Perform Qualitative Risk Analysis
- Perform Quantitative Risk Analysis
- Plan Risk Responses
- Monitor and Control Risks

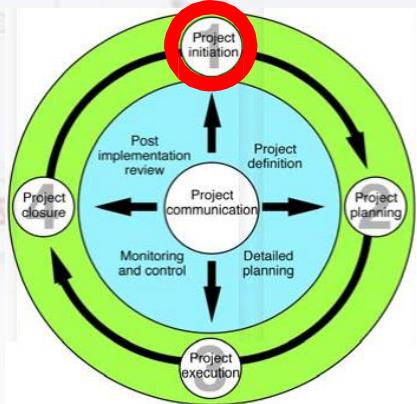
### Project Procurement Management

- Plan Procurements
- Conduct Procurements
- Administer Procurements
- Close Procurements

### Project Communication Management

- Identify Stakeholders
- Plan Communications
- Manage Communication
- Manage Stakeholder Expectations
- Report Performance

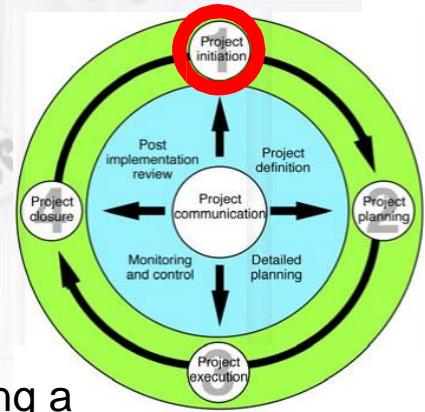
# Project Definition



# Project Definition Triggers



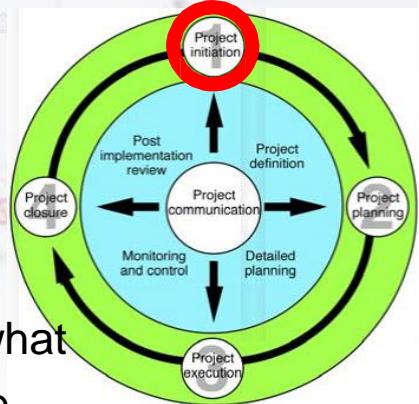
- ✓ Understanding the real triggers behind introducing a project is important in defining the project and understanding its constraints
  - ✓ Triggers help define the project's criticality, priority, deadline, impact, expected outcomes, risks, etc...
  - ✓ Example project triggers:
    - Responding to an existing problem
    - Fulfilling strategic objective
    - Responding to a new or amended legislation, etc...



# Project Definition Goals & Objectives



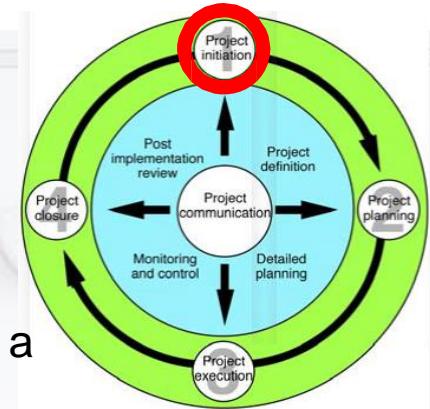
- ✓ *Goals and objectives* are statements that describe what the project will accomplish, or the business value the project will achieve.
- ✓ Goals are high level statements that provide overall context for what the project is trying to achieve, and should align to business goals.
- ✓ Objectives are lower level statements that describe the specific, tangible products and deliverables that the project will deliver.



# Project Definition Goals & Objectives



- ✓ An objectives can be evaluated at the conclusion of a project to see whether it was achieved or not.
- ✓ Goal statements are designed to be vague.  
Objectives should not be vague.
- ✓ Objectives need to be well-worded to be **SMART**:  
**S**pecific,  
**M**easurable,  
**A**ttainable/Achievable,  
**R**ealistic and  
**I**time-bound.

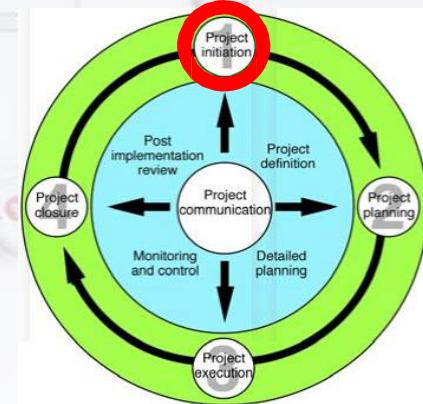


# Project Definition Goals & Objectives



- ✓ Understanding the real goals and objectives behind your project is a key driver to project success.
- ✓ Properly articulating project goals and objectives and confirming them with project stakeholders leads to reduced misunderstandings and higher success ratio.
- ✓ Clear goals and SMART objectives define the target a project needs to fulfill.

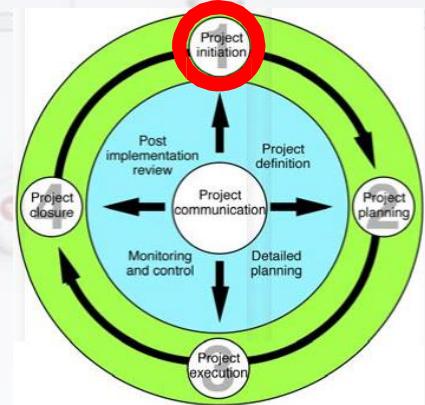
The definition of goals and objectives is more of an art than a science, and it can be difficult to define them and align them correctly.



# Project Definition Goals & Objectives



- ✓ An example of a project goal is:
  - *To increase the overall satisfaction levels for stakeholders calling for support.*
- ✓ The above goal does not specify how stakeholder satisfaction will be increased. Is it by enhancing technology, or by training people, or is it by changing strategies.
- ✓ Therefore SMART objectives must be defined to translate the above goal into something measurable.



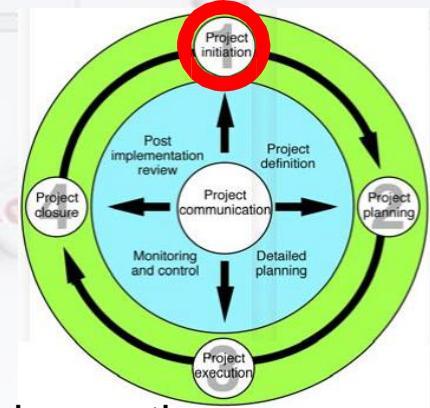
# Project Definition Goals & Objectives



- ✓ An example of an objective statement is: Enhance the capabilities and skill level of the staff handling stakeholder interactions within a period of three months on services and on how to track the status of stakeholder requests aiming to increase the ratio of first time response to 75%.

## The above objective is:

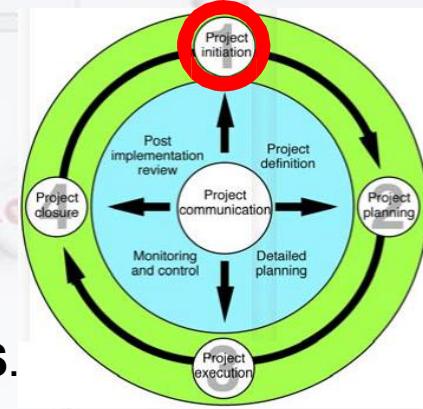
Specific, Measurable (in terms of first time response ratio), Achievable, Realistic and Time Bound as it should be completed within 3 months.



# Project Definition Scope



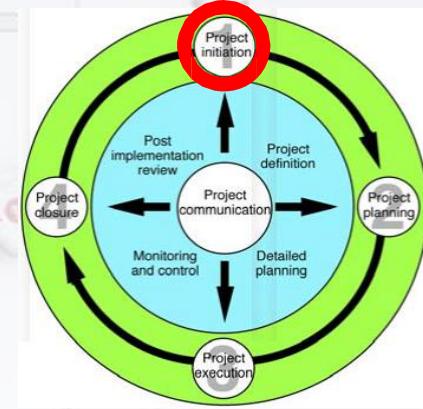
- ✓ Clearly defining project scope leads to **SUCCESS**.
- ✓ Project scope is about clearly articulating ***what is included*** in your project and more importantly ***what is not included***
- ✓ The main purpose of the scope definition is to clearly describe the boundaries of your project and get all stakeholders to agree to it.
- ✓ Scope is tightly linked to the project goals and objectives.
- ✓ It is the project manager's responsibility to ensure scope is managed throughout the project and scope **CREEP** (incremental expansion of the project scope) is avoided.



# Project Definition Scope



- ✓ Changes to the scope should be managed by the project manager in a structured manner via change control process throughout the project.
- ✓ Change control guarantees that impact on Cost /Budget, Schedule/ Time, Scope/Quality is defined and agreed amongst all the parties.
- ✓ Scope is defined at a high level during initiation stage and is detailed during the planning stage.



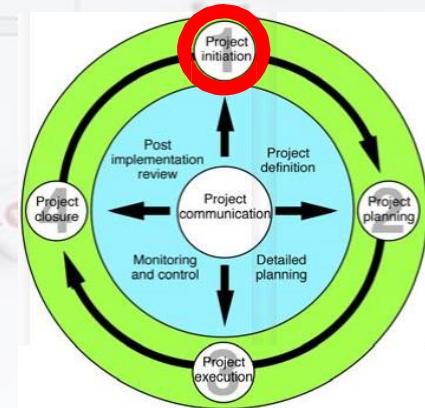
# Project Definition

## Deliverables



Deliverables must be specific so that certain individuals or teams can be held accountable for achieving them.

- ✓ Once the goals / objectives and scope are defined, the project manager needs to clearly define the set of deliverables that the project is expected to achieve.
- ✓ Deliverables can be either Tangible or Intangible.  
**For example:** a report, document or system upgrade are considered tangible deliverables while deliverables such as “achieving recognition” or “building capability or human competence” are intangible.
- ✓ Deliverables must be achievable, so when defining a deliverable you should ask yourself “can this actually be delivered?”



# Project Definition

## Vendors & Stakeholders



### Vendors

When defining the security project, if there is a need to procure services or products from a specific vendor, the following shall be defined:

Type of capabilities required

Vendors that can provide the service or product that fulfill the required capabilities

Vendors are engaged by contractual agreements which are supported by SOW that clearly define the role of the vendor

### Stakeholders

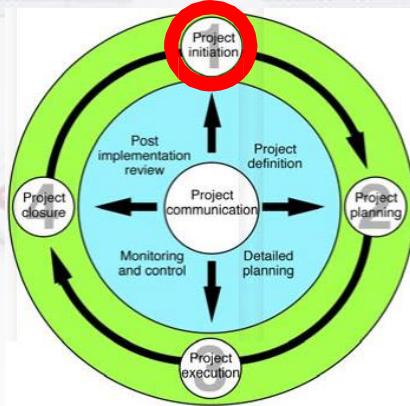
Are entities that have an interest in a given project.

May be inside or outside an organization (Sponsor, Influencer, etc.)

Stakeholders need to be updated regularly on project progress

Find Stakeholders early in the process; Have your communication plan ready.

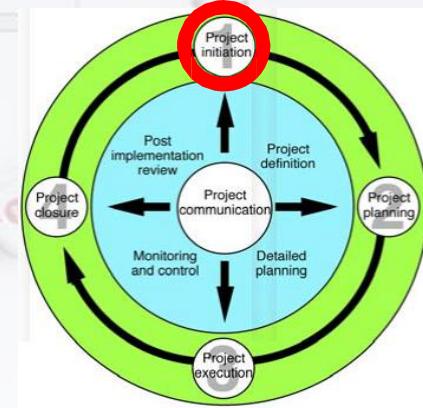
Ask them for assistance when needed. Inform them about project closure.



# Project Definition Constraints



- 1** A Constraint is the state of being restricted or compelled to avoid or perform some action.
- 2** Project constraints include anything that may limit the project team ability to complete the project successfully.
- 3** Typically constraints relate to resources, cost, personnel, schedule, scope or quality.



# Project Definition Constraints

## Examples

Cost  
Constraints

Schedule  
Constraints

Resource  
Constraint

The maximum budget set for this project is \$100,000.

**What does this mean for the project?**

The project needs to plan its resources and activities in such a manner that such budget is not exceeded such as using cheaper resources, or identifying a more cost effective vendor or find more efficient ways to do the work.

Holidays, Vacation, & Weekends.

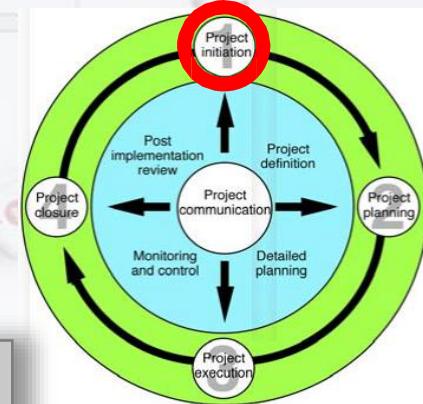
**What does this mean for the project?**

The project needs to be ready for those events on that date, which may have an impact on the resources or on planning the activities in parallel or dedicating key staff for the job, etc...

AHJ can only be available one day a week for the project

**What does this mean for the project?**

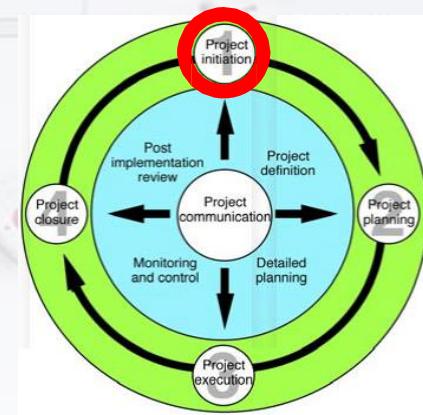
This means that the project needs to reflect the impact on project timeline and on scheduling the activities to effectively use the time.



# Project Definition Risks



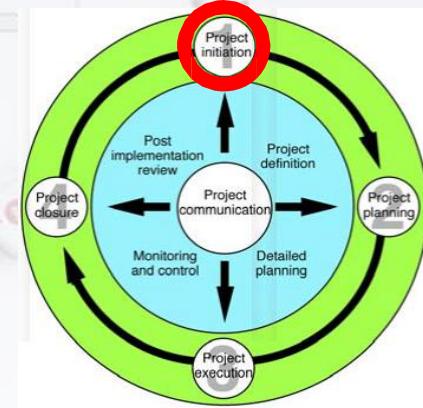
- 1** Project risks are areas of concern that may materialize into issues during the life-cycle of the project and which may impact the project's scope, resources, cost or schedule.
- 2** The source of project risks could be financial, technical, contractual, legal, social, etc...
- 3** Risks must be identified and managed at the beginning of the project and throughout the project life-cycle.
- 4** Risks management goes through the following steps: risk identification, risk analysis, risk response and documentation .
- 5** Risks must be monitored and controlled throughout the project. Risk control methods include: Avoid, Reduce, Share, Accept (with or without contingency), Contain



# Project Definition Dependencies



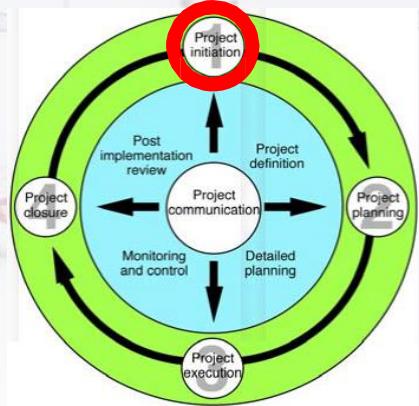
- ✓ Security Projects are always dependent on something else or someone else, or other projects may be dependent on your project.
- ✓ Managing security project dependencies is a core skill for project managers.
- ✓ Security Project dependencies establish the links, and the type of links, between your project and the environment where it exists.
- ✓ Beside the dependencies between the project tasks, a project manager must also manage the dependencies with other projects.



# Project Definition Budget & Spending



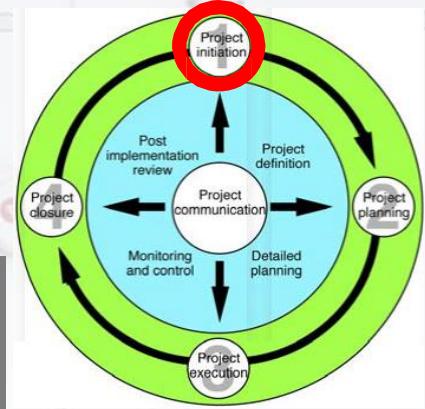
- ✓ Clarity of the specified project budget and tracking of actual expenditures over time is a necessity.
- ✓ Many security projects fail because they go over and above the expected cost and planned budget.
- ✓ Beside defining the security project budget, by understanding how the security project money is spent is important to plan the project cash flow and keep healthy project financials.



# Project Definition Communications Plan



- ✓ Once all the stakeholders are defined, a project communication plan needs to be defined. A high level communication plan is defined in the charter and detailed during project planning.
- ✓ A well planned project has a well planned communication strategy. The following are some options when creating a Communication Plan:
  - Initiation Meeting
  - Project Kick-Off
  - Status Reports



# Project Initiation



## Project Charter

A Project Charter is a living document outlining the issues, targets and framework of a process improvement effort.



### Problem Statement

The problem captured in the form of a measurement.



### Business Case

The business reasons for doing the project.



### Goal Statement

The target of the process measurement.



### Timeline

When each project phase will be completed.



### Scope

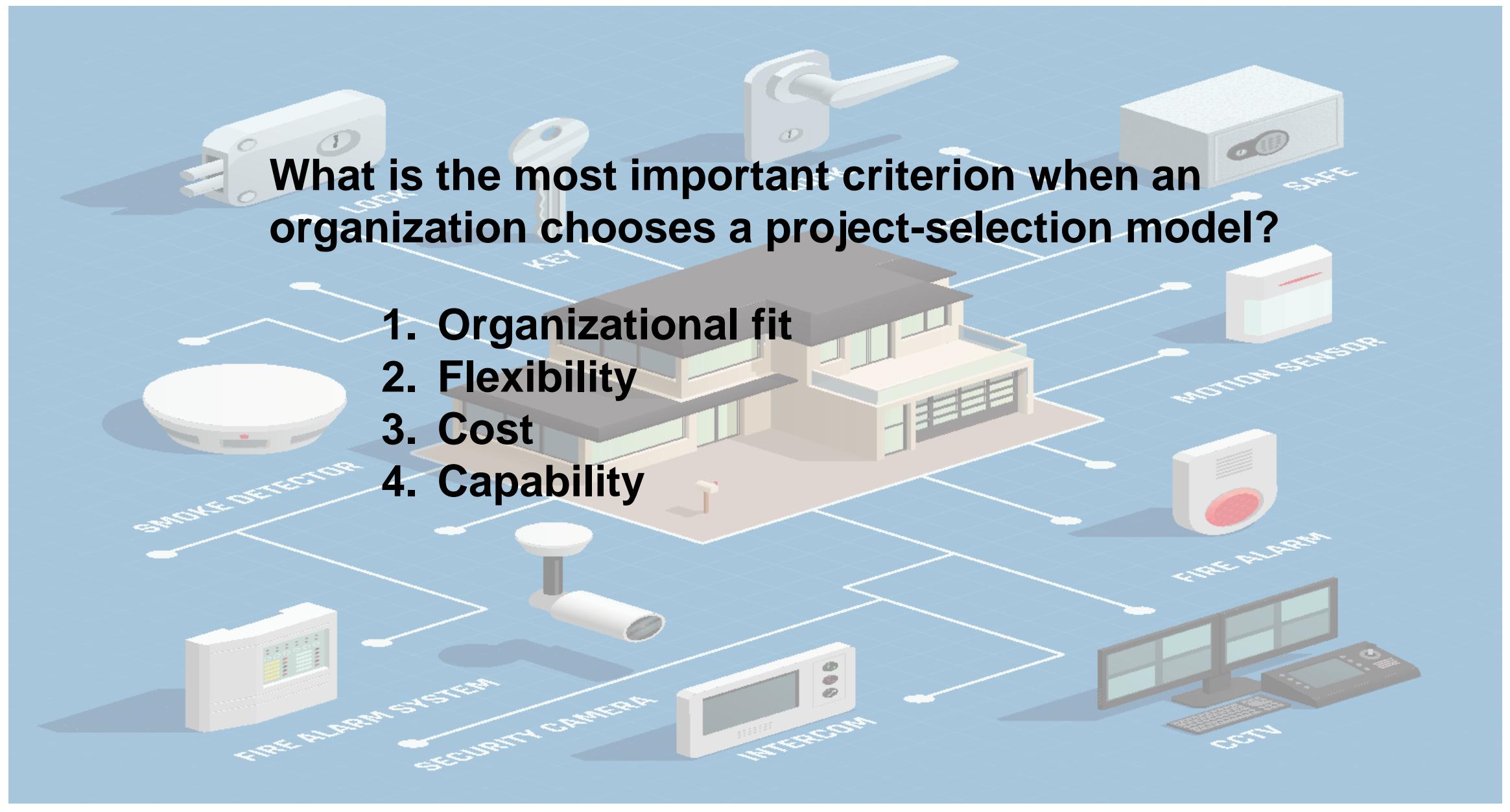
What's in and what's out of the project.



### Team Members

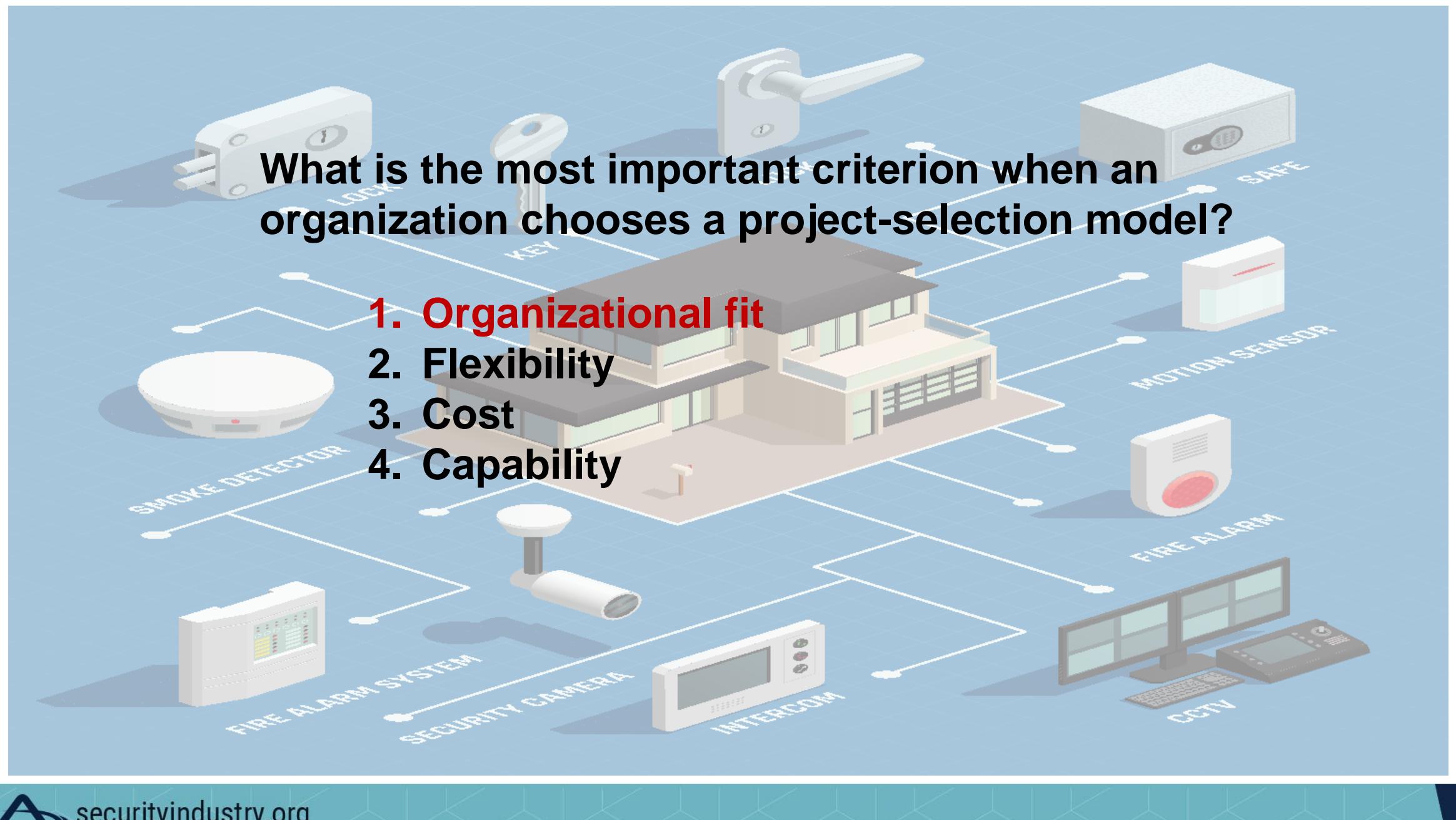
The people who will participate in the project.

Project Charter			
Project Name			
Project Description			
Project Manager		Date Approved	
Project Sponsor		Signature	
Business Case		Expected Goals/Deliverables	
Team Members			
Name	Role		
Risks and Constraints			
Milestones			



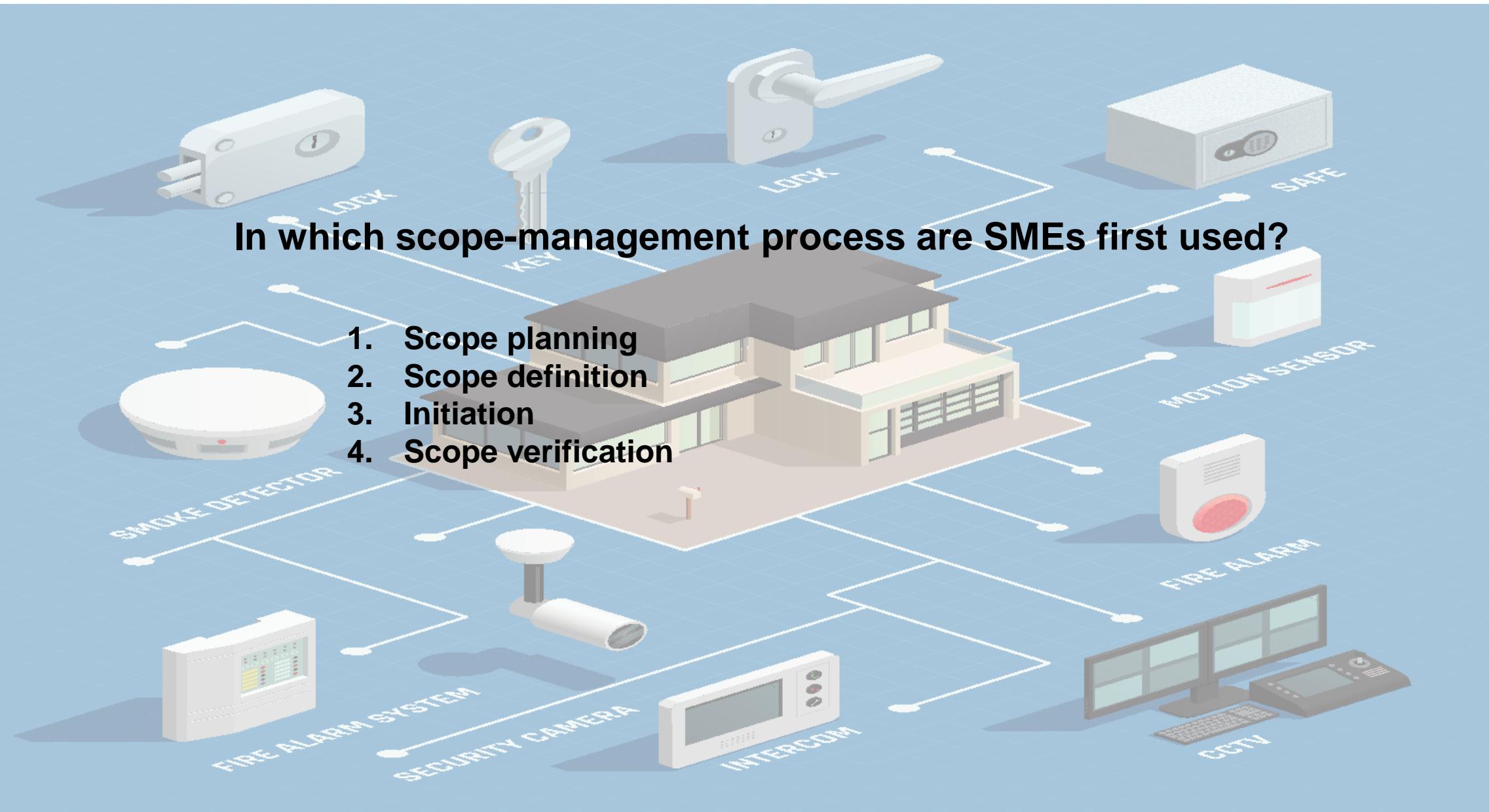
**What is the most important criterion when an organization chooses a project-selection model?**

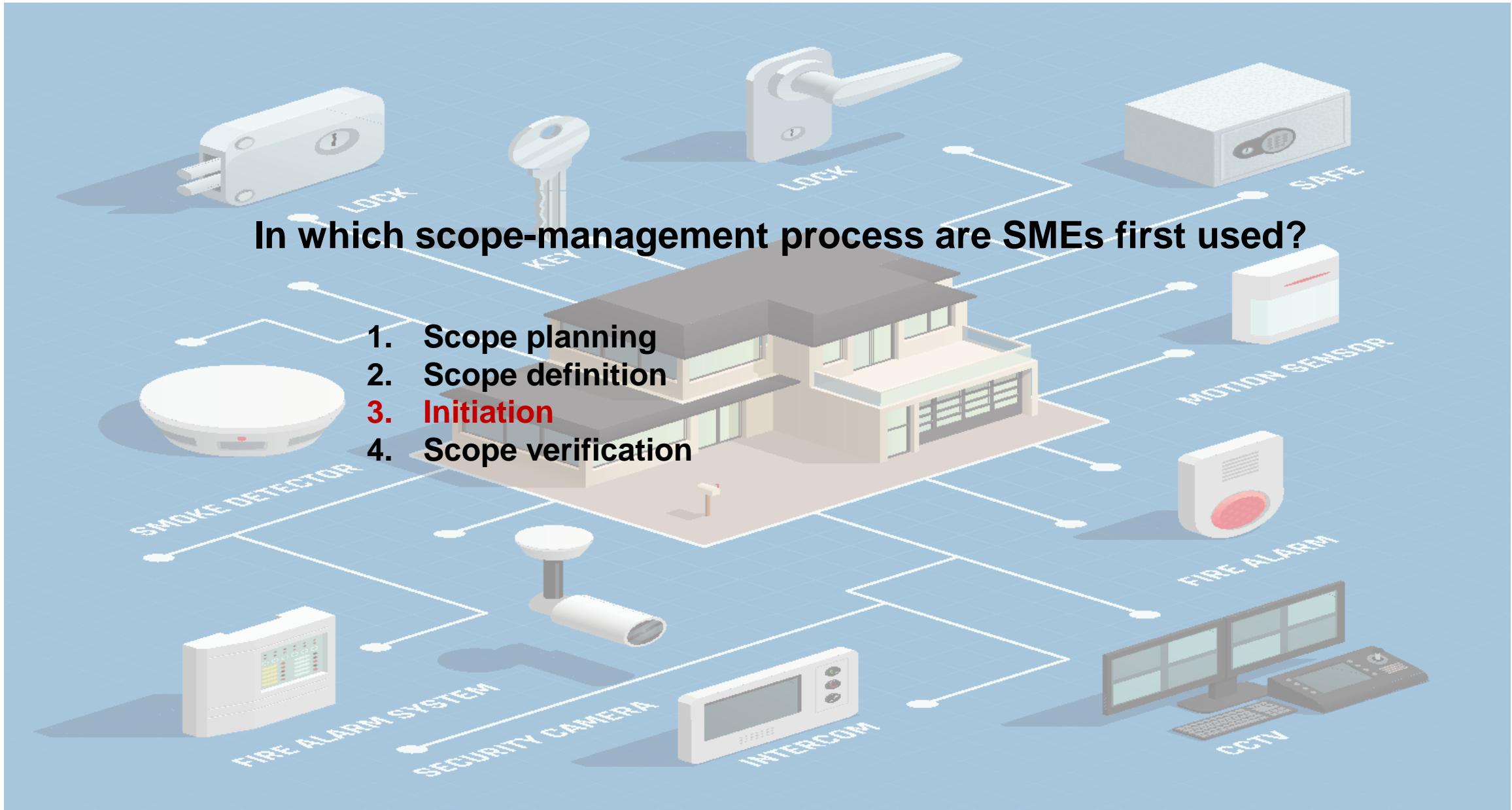
1. Organizational fit
2. Flexibility
3. Cost
4. Capability



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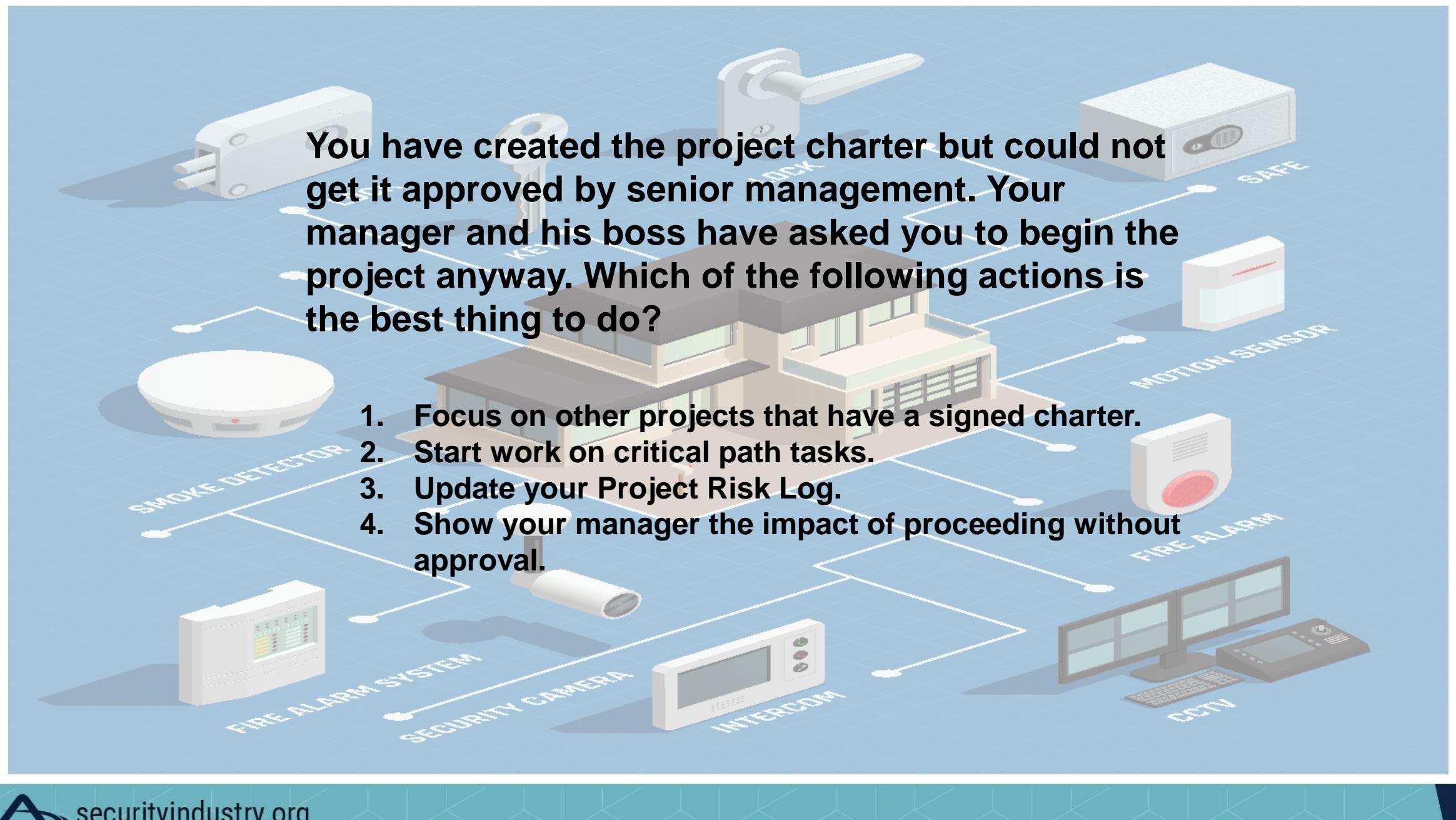
- 1. Organizational fit**
- 2. Flexibility**
- 3. Cost**
- 4. Capability**





In which scope-management process are SMEs first used?

1. Scope planning
2. Scope definition
3. **Initiation**
4. Scope verification

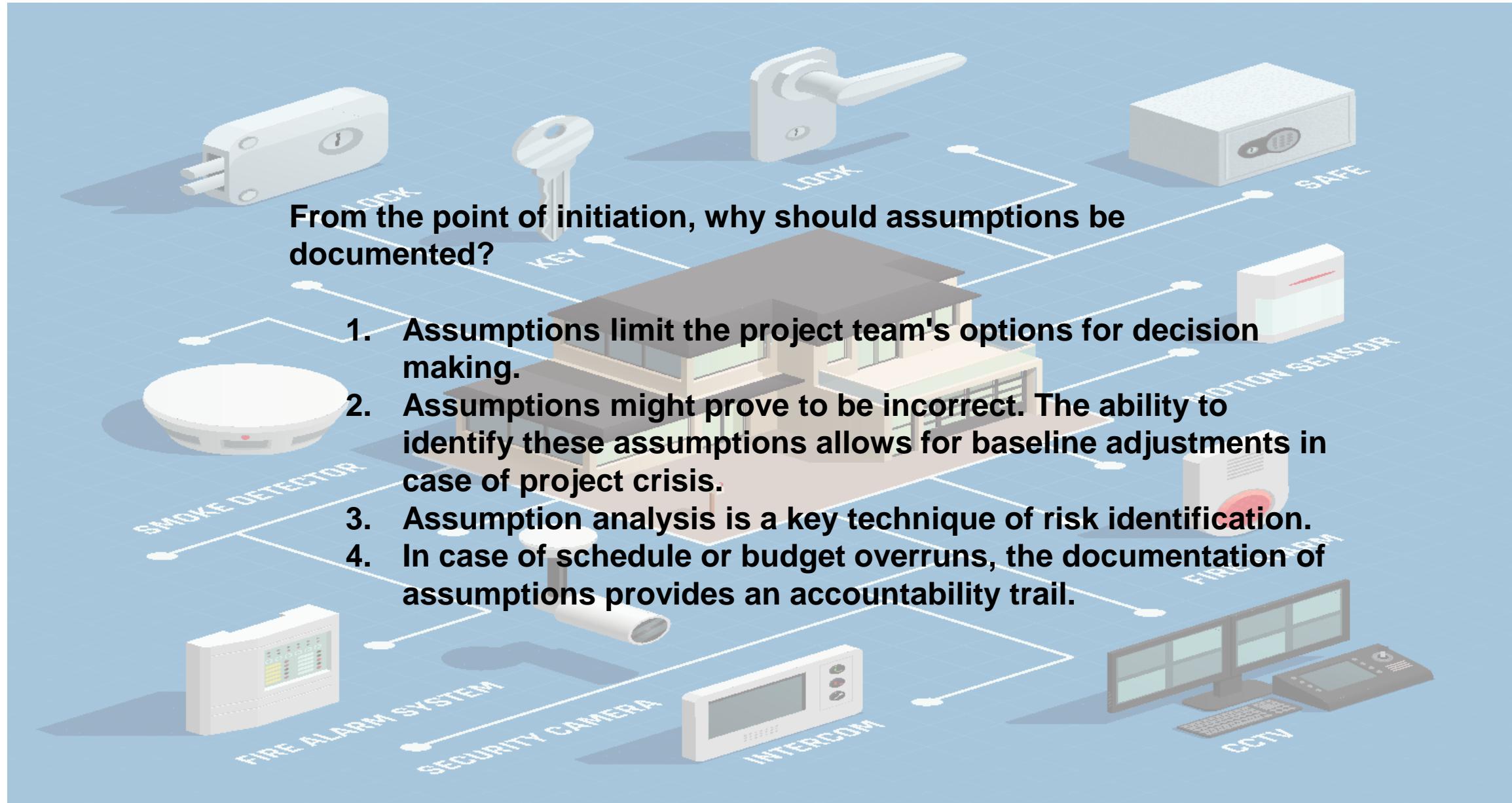


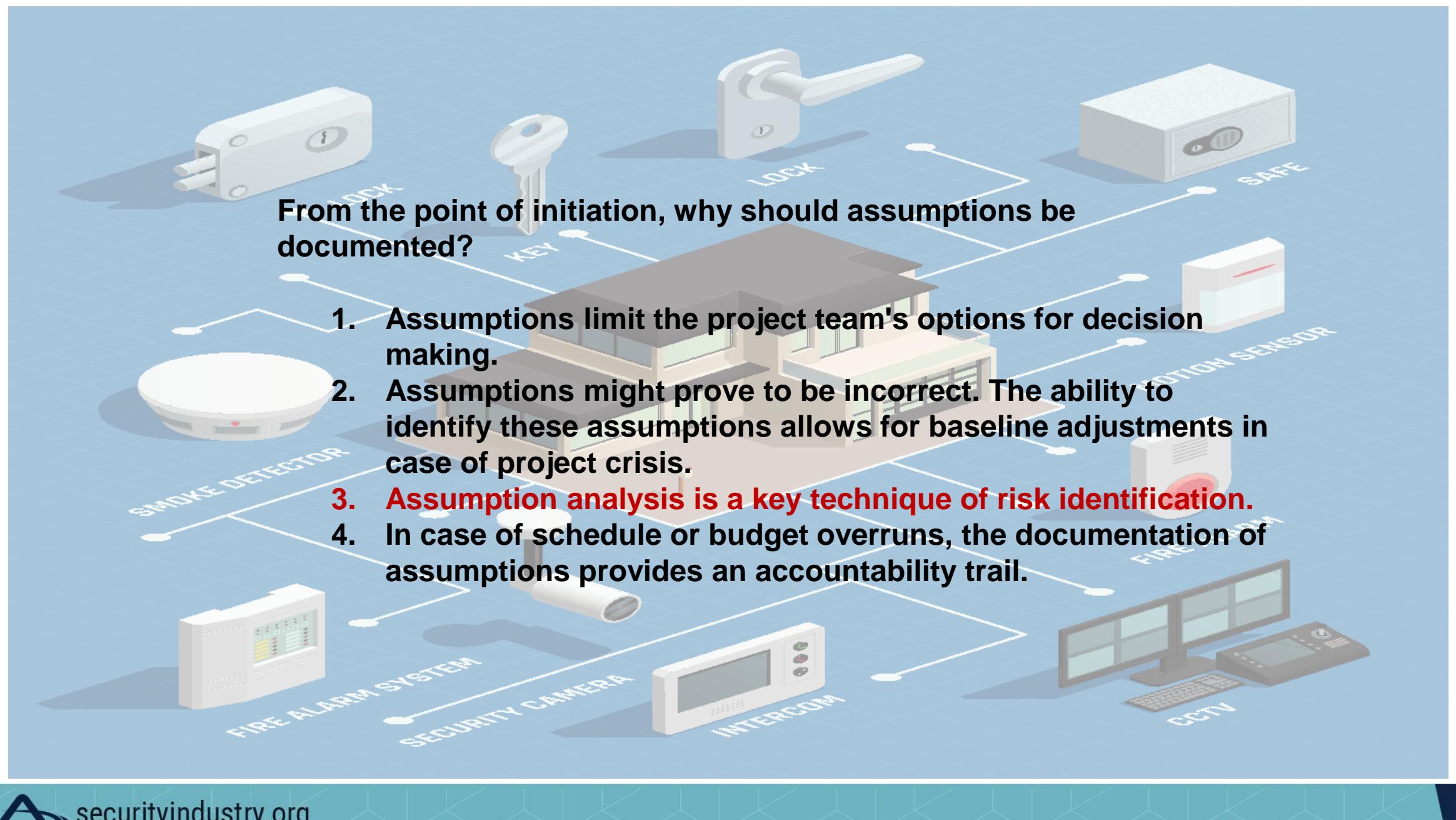
You have created the project charter but could not get it approved by senior management. Your manager and his boss have asked you to begin the project anyway. Which of the following actions is the best thing to do?

1. Focus on other projects that have a signed charter.
2. Start work on critical path tasks.
3. Update your Project Risk Log.
4. Show your manager the impact of proceeding without approval.

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From the point of initiation, why should assumptions be documented?

1. Assumptions limit the project team's options for decision making.
2. Assumptions might prove to be incorrect. The ability to identify these assumptions allows for baseline adjustments in case of project crisis.
3. **Assumption analysis is a key technique of risk identification.**
4. In case of schedule or budget overruns, the documentation of assumptions provides an accountability trail.



## Keys to a Successful Security Project Initiation

- ✓ One of the most important parts of project initiation is to define the project
- ✓ Determines the time, cost, quality and resource requirements
- ✓ Determines the scope of the project (what's in/out)
- ✓ Usually only happens after feasibility study completed
- ✓ Once the project definition has been completed and the scope identified, documenting and getting approval of the scope is the next stage
- ✓ The *outputs* from project initiation are:
  - the project charter
  - the product description
  - list of assumptions and constraints
  - the appointment of a **security project manager**