Project Discovery Guide

Purpose: Following the PMO leadership's Client Intake, assigned resources can use these questions to narrow down the defined scope to ensure the PMO services are correctly defined. This document provides a framework for project discovery, but questions and discussion topics will vary based on individual projects. Staff should gather information necessary to develop the Statement of Work and to assist with completing the Project Charter or Lite Charter.

1. Project Description

The how, what, and when of key deliverables

- What does the current state look like? Current state metrics available?
- What are the costs if we do not make this change now?
- What deliverables come to mind for this project?
- Are there distinct deadlines for deliverables?
- Institutions impacted
    - All UW System institutions
    - Subset of UW System institutions
    - Institutions outside UW System
- Roles of impacted end users or consumers
    - Staff
    - Faculty / instructors
    - Students
    - UW System leaders
    - External partners
    - Public
    - Other
- Total number of people directly or indirectly impacted
    - Less than 100
    - 100 to 999
    - 1,000 to 9,999
    - 10,000 or more
- Estimated total cost to implement
    - Less than $500,000
    - $500,000 to $999,999
    - $1,000,000 or more

2. Contributors / Resources

- Who is involved in the project? Who likely will be or should be involved?
    - Key UWSA and campus contacts
    - Key external contacts
    - Impacted end users/consumers
    - Departments/divisions/work groups
- Are other initiatives likely to impact team members' time available for project?
- Who will be the SMEs (corporate marketing, finance, etc.)?
- What other key stakeholders should I talk to about this project? (Key stakeholders are those who determine the success or failure of the effort – decision, authority, direct benefit, connectors.)
- What kinds of communication resources might be needed?

3. Metrics / Results (Quality, Cost, Delivery)

- What will we measure to evaluate the project's success?
    - Product / service output (e.g., number of items or transactions, financial value of transactions)
    - Cost savings or avoidance
    - Risk reduction
    - Time savings or efficiency increases
    - Effectiveness
    - Innovation
    - Quality
- Implementation metrics? Sustainment metrics? Communication metrics?

4. Roadmap / Timeline / Toll Gates

- What significant milestones or targets exist?
- Sponsor approvals/tollgates?
- Will a pilot process be required? Timing?
- Other key dates or impacting events? (Business case, charter approval, RFP, technology/build, communications)
- When will project team hand off the initiative to an operating group?

5. In Scope / Out of Scope

- Are all UWs in scope? Are any functions not to be considered?
    - Population impacted, change management, communications, training
- Will systems and/or technology be in scope, or only the process?
- Will UW System policies be addressed?

6. Base Assumptions / Constraints

- What are areas of given information or things that can't be changed?
- Any notable constraints or risks? (e.g., budget, technology, policies)

7. Communications and Change Management

- What benefits do you expect from project implementation?
- To what degree will technology change because of this project?
- To what degree will processes, skill sets, and ways of working change?
- To what degree will your policies change?
- To what degree will the services you provide change?
- What resistance to the change do you foresee that the PMO should be aware of?
- What other major initiatives are ongoing or currently planned for your area within the next year that will impact the individuals involved in this project?
- What are the key messages about the change that need to be delivered to main audiences?
- Are you aware of specific questions your team or colleagues may have about the change?
- In your opinion, does the project leadership team appear to operate as a cohesive unit as relates to this initiative?
- Change Lead Assessment: Change Type
    - Developmental (an improvement to an existing way of operating)
    - Transitional (replacing current state with a new state designed to resolve the inadequacies of the current state)
    - Transformational (fundamental shift of culture, behavior, and mindsets from one state of being to another)

8. Statement of Work

- Based on intake and discovery discussions, PMO staff will recommend services and draft a Statement of Work for approval by the project lead and PMO director.
- Review and discuss the Statement of Work template to prepare a draft:
    - Services –
        - Project Management
        - Communications
        - Change Management
        - Project Pre-Planning
        - Project Coordination
        - Other
    - Work Summary – description of work to be performed by PMO staff
    - Staff Resources – start and end date of services, maximum number of hours to be provided by whom
    - Billing – Rate of $70 per hour, per person for funded projects, to be invoiced monthly, quarterly, annually, or at the end of the project