ANALYZING YOUR PROJECT MANAGEMENT PROCESSES

A workbook to define requirements & optimize efficiencies.

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Framework
Project Management Software

The Framework Project Management Workbook will support your planning process, document your decisions, and speed up your implementation by helping you to:

- Build your team
- Define your vision
- Define and prioritize your goals
- Define workflow and project templates
- Define key aspects of your processes
- Define fields associated with your processes
- Decide which reports and email alerts you need
- Prepare to import data into the Framework Project Management tool

Build Your Team

Use this worksheet to identify the people who'll be critical to making Framework a success at your company.

My Framework Project Team		
Role Name	**Role Description**	**Team Member Name/Title**
Executive Sponsor	Lends influence to the project by becoming the champion. Sets the business vision for the implementation.	
Project Owner & Admin	1) Guides the project to successful completion. 2) Understands all business processes and maps processes to the Framework implementation. 3) Gets the application up and running and manages it day to day. 4) Serves as liaison to the Power Users to ensure the application meets day-to-day needs.	
Power Users	Day-to-day users	

Define Your Vision

A project management vision statement should include:

a) A confident view of your future
b) Clearly defines what you want to do
c) Encourages creativity to achieve what you need to do to get there
d) Is the foundation for all your project management development plans

Furthermore, Vision Statements are the inspiring words to clearly and concisely convey the direction of the department. By crafting a clear vision statement, you can powerfully communicate your intentions and motivate your team to realize an attractive and inspiring common vision of the future.

Set Your Goals

Define and prioritize your goals

- Document any current project management issues
- Clarify your process improvement goals
- Prioritize your goals

Document Your Pain Points

Create a list of the issues different groups face and remember that each group will have unique goals. Your "Groups" could be Litigation Support, Project Managers, Attorneys, Paralegals, Clients, etc.

Your Pain Points	Group
•	
•	
•	
•	
•	
•	

Clarify Your Goals

Define your goals in terms of the hoped-for solutions for each target group. You may also define how those goals can be measured.

Process Improvement Goals	
What does the executive team hope to get out of Framework?	•
What does litigation support hope to get out of Framework?	•
What are the goals of your end users?	•
How are these goals measured?	•

Increase	Reduce	Improve	Create
• Profit	• Cost	• Productivity	• Strategy
• Growth	• Time/Effort	• Process	• System
• Market Share	• Complaints	• Service	• Processes
• Retention	• Risk	• Quality	• Consistency
• Efficiency	• Turnover	• Loyalty	• Accountability
• Visibility	• Paperwork	• Information	•

Prioritize Your Goals

Process Improvement Goals	
Must Have	•
Important	•
Nice to have	•

Define Your Process
Document the Key components of your project management process or workflow

Identify Key Aspects of Your Project Management Processes
- Project Scope
- Tasks
- Productions
- Documents
- Media/Data Intake
- Change Control Management
- Issue Management
- Custodial Tracking
- Vendor Management

Define the Fields Needed for Your Process
Identify the fields and pick-list values fit your process that will be incorporated into Framework.

- **Departments (some examples)**
  - IP
  - Labor & Employment
  - Litigation
  - Litigation Support
- **User Roles (some examples)**
  - Administrator
  - Attorney
  - IT
  - Litigation Support
  - Paralegal
- **eDiscovery Software (some examples)**
  - IPRO
  - LAW
  - Wave/Trident

Define Needed Reports

Identify standard Framework reports that match the business goals you defined. Also, you may want to create a list of custom reports you have used in the past..

- **Standard Reports**
  - Open Matter Project Report
  - Overdue Task Report
  - Media/Data History Report
  - Vendor Invoice Report
  - Timesheet Report
- **Custom Reports**

Email Alerts

Develop a list of email alerts that, based on user role, will be sent out automatically updating members of the team with regard to status of projects, tasks etc…

My Email Alerts (some examples)

- Overdue Task
- Overdue Project
- Project Status
- Completed Tasks
- Complete Projects

Define Project Templates

Use this worksheet to define your custom project templates and workflows.

Data Collection			
Task Name	**Task Description**	**Task Note**	**Expected Task Duration**
Plan	Complete the eDiscovery Action Plan: 1.) Who are the target custodians? 2.) What equipment do they use (laptops, desktops, blackberries, etc)? 3.) What is the date range for the collection? 4.) Where will the data collection take place?		
Quote(s)	A) Obtain vendor quotes for collection. Quotes must include anticipated related expenses such as travel, travel time and any per diem. B) Present Quotes for Attorney Review and Authorization. C) Quotes should be forwarded along with any recommendation. No vendor activity shall proceed without attorney authorization.		
Data	Receive Data from Collection Vendor. Review the data manifest from the vendor and make certain that all data that was intended to be sent has been received. Verify volume size, media count, etc.		
Servers	Store Data on Processing or Hosting? Data collected needs to be stored on Firm processing or hosting servers.		
Log	All media received must be logged into iFramework with the Media Data and Intake tab.		

Import Data

Framework provides a standard import file to identify the following key information about your data, in preparation for importing it into Framework.

- **Clients**
- **Matters**
- **Vendors**
- **Users**
- **Existing Workflows**