

The Project Tactical

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Purpose

The purpose of this project framework is to demonstrate how you can build and use what I've termed a "Project Tactical" in order to assist with technology management efforts as applied to technology projects (such as web-based projects).

Project Tactical Details

In almost all organizations, the managerial pyramid consists of three levels. The top management level deals with strategic planning (up to ten years in the future) whereas middle management (such as department heads) deals with intermediate planning (up to two years in the future). Finally, lower management deals with operational planning (up to one year in the future). Middle and lower management are the two tiers which determine the outcome of a project (whether it is successful or a failure). Most of the time lower management will bear the most responsibility and need to have the greatest degree of skills to carry a project to completion.

In order for a project to be successful the project manager and project lead must be able to work with other individuals to achieve the objectives, get the most out of limited resources and balance effectiveness and efficiency. One key to ensuring a project will be completed as mandated or approved are the skills of the project manager and project lead to include technical (expertise, problem solving, imagination and creativity, clarification of goals and objectives), teambuilding (coordination and cooperation, team problem solving, directing and coaching, receptive to insights) and drive (standards of performance, control of details, standards of performance, energy). While Gantt charts, scheduling and PERT complex scheduling (among other tools) may be useful to middle and lower management in monitoring, communicating and reacting about the evolution of a project those tools are not that beneficial to individuals who have been tasked to take a project from conceptualizations to reality in the realm of technology.

The Project Tactical is a combination of the strategic interests of a project (as realized by top and/or middle management) and systematic (tactical) considerations of those interests producing an in-depth and concise project document that are to be utilized not only by middle and lower management, but equally amongst the individuals who will take the project from concept to reality.

The Project Tactical is comprised of four main sections being the abstract, participants, requirements assessment and technical specifications as seen in Figure 1.

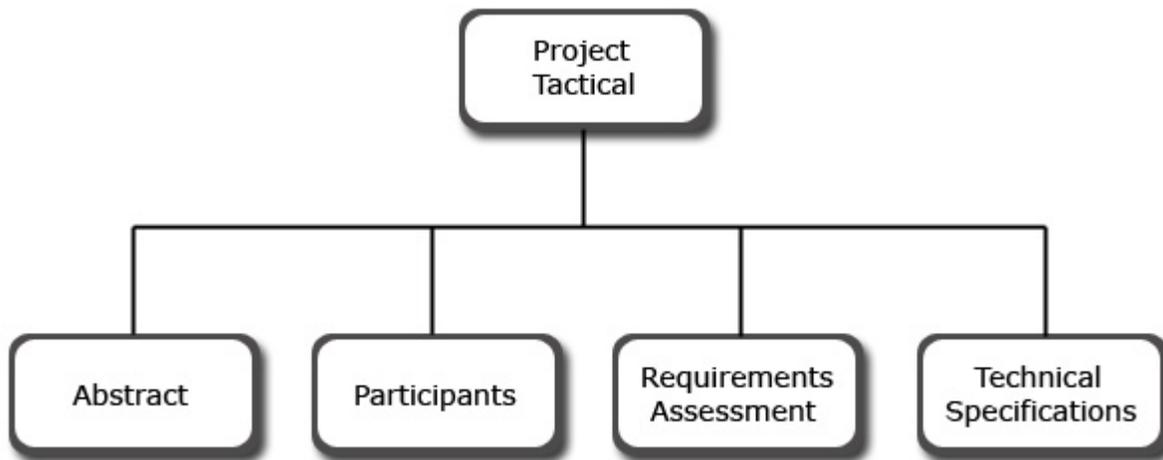


Figure 1: Project Tactical

The Abstract

The abstract section, as the foundation of the Project Tactical, serves to provide the basic building blocks that the remainder of the Project Tactical is derived from as seen in Figure 2.

- **Purpose** discusses what the project will accomplish and why.
- **Scope** discusses how the project will accomplish its purpose.
- **Audience served** specifically identifies the audience that the project will serve.
- **Duration** identifies, in working days, how long the project is expected to take to complete.
- **Start date** identifies the first day that work on the project will begin.
- **Conceptual material** provides the network location/url (and credentials, if any) individuals may access.
- **Programming workflow** provides the network location/url (and credentials, if any) to programming design workflow material, programming logic diagrams, bubble charts and other material that will guide programmers and developers.
- **Collaboration** provides individuals with the opportunity to collaborate (share project notes, etc), aside from physical meetings, as the project develops. An example could be a wiki.
- **Allocated budget** identifies how much funding has been dedicated to the project.
- **Project manager** is commonly a middle or lower manager for the project. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.
- **Project lead** is commonly a lower manager for the project and is the one who is directly exposed to the project on a daily basis. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.
- **Hardware lead** is the expert regarding the hardware that the project will utilize. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business

address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.

- **Software lead** is the expert regarding the software that the project will utilize. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.
- **Multimedia lead** is the expert regarding the multimedia (such as digital equipment) that the project will utilize. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.

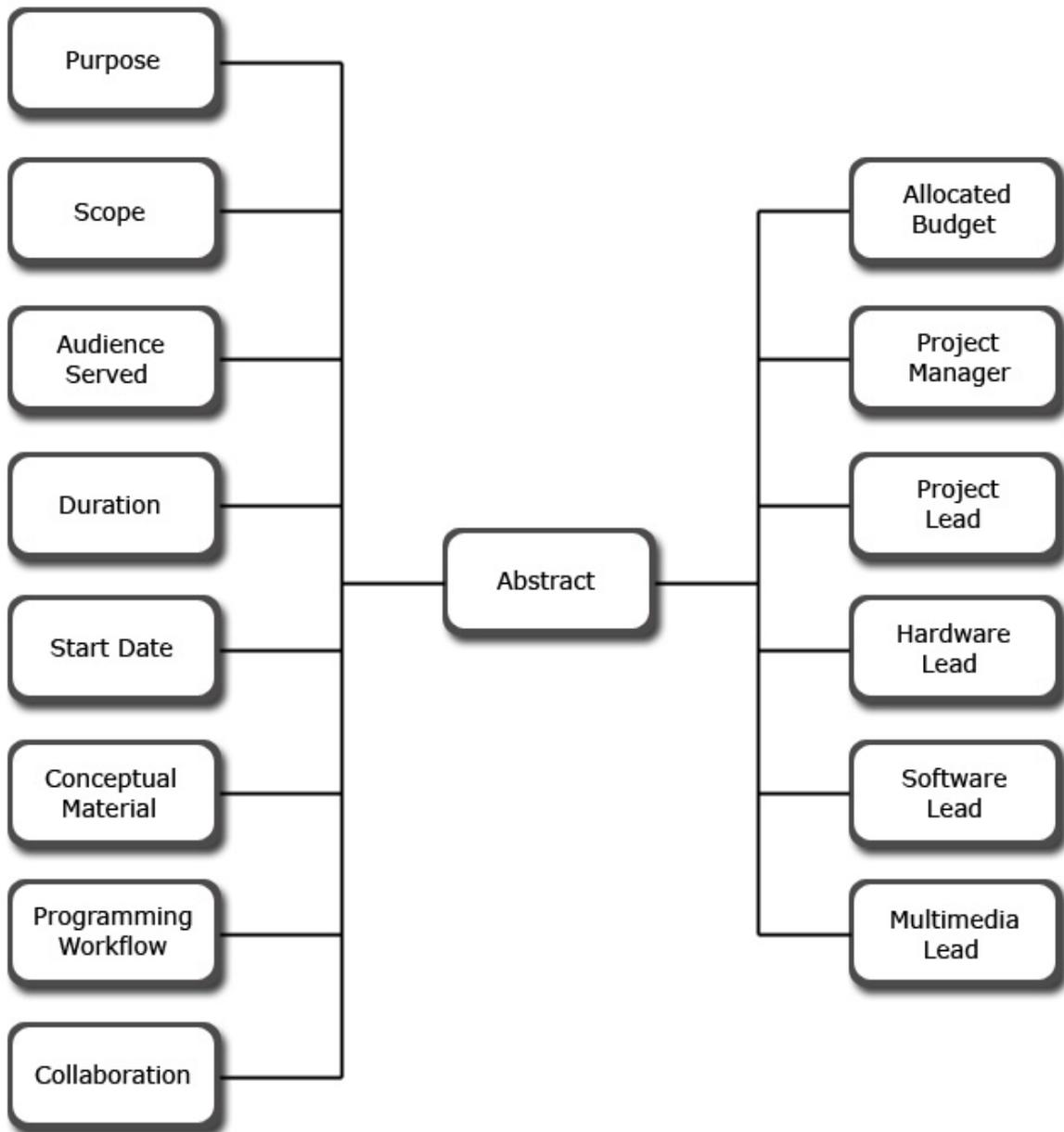


Figure 2: Abstract of the Project Tactical

The Participants

The participants section, as recalled from Figure 1, serves to specifically identify exactly who will be contributing to the project and what their responsibilities are as seen in Figure 3.

- **Hardware staff** provides a clear and concise list of the individuals who will be responsible for the hardware aspects of the project. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business or personal address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.

- **Software staff** provides a clear and concise list of the individuals who will be responsible for the software aspects of the project. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business or personal address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.
- **Multimedia staff** provides a clear and concise list of the individuals who will be responsible for the multimedia aspects of the project. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business or personal address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.
- **Alpha testers** provides a clear and concise list of the individuals who will be responsible for the alpha testing of the project. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business or personal address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.
- **Beta testers** provides a clear and concise list of the individuals who will be responsible for the beta testing of the project. Specifically, the data to include under this section: is member an employee or 3rd party, member position, member position in this roll, member name, business or personal address/phone/fax/email, member responsibilities, member project status: full time, part time, contract, estimated number of hours of participation.

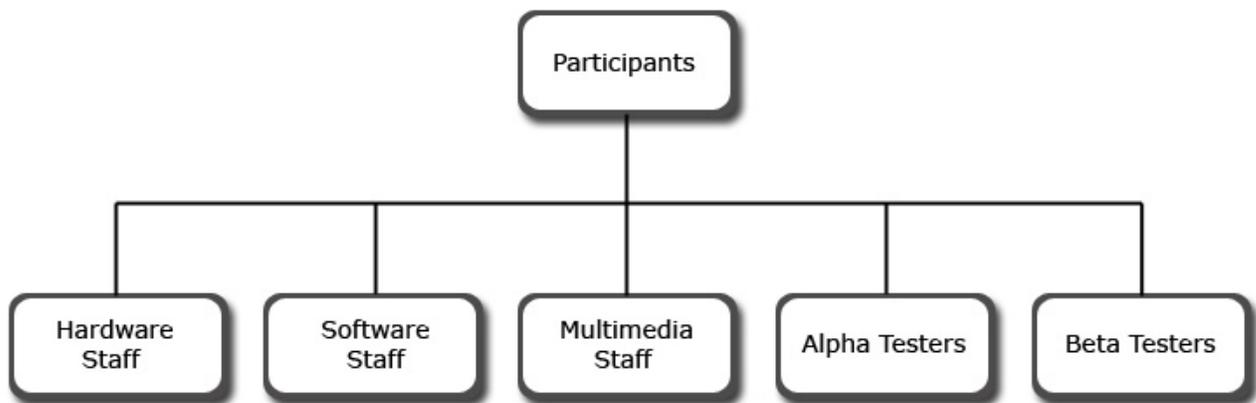


Figure 3: Participants of the Project Tactical

The Requirements

The requirements assessment section, as recalled from Figure 1, serves to specifically identify the development environment of the project (hardware and software that is required and recommended) as well as the hardware and software requirements (and recommendations) of the audience that the project will be serving as seen in Figure 4.

- **Development hardware required** includes: component name, component part number, component cost, supplier name/address/phone/fax/email, supplier contact name.
- **Development hardware recommended** includes: component name, component part number, component cost, supplier name/address/phone/fax/email, supplier contact name.
- **Development software required** includes: software name, software version, software license, software cost, software supplier name/address/phone/fax/email, software supplier contact name.
- **Development software recommended** includes: software name, software version, software license, software cost, software supplier name/address/phone/fax/email, software supplier contact name.
- **Audience hardware required** includes: component name, component part number, component cost, supplier name/address/phone/fax/email, supplier contact name.
- **Audience hardware recommended** includes: component name, component part number, component cost, supplier name/address/phone/fax/email, supplier contact name.
- **Audience software required** includes: software name, software version, software license, software cost, supplier name/address/phone/fax/email, supplier contact name.
- **Audience software recommended** includes: software name, software version, software license, software cost, supplier name/address/phone/fax/email, supplier contact name.

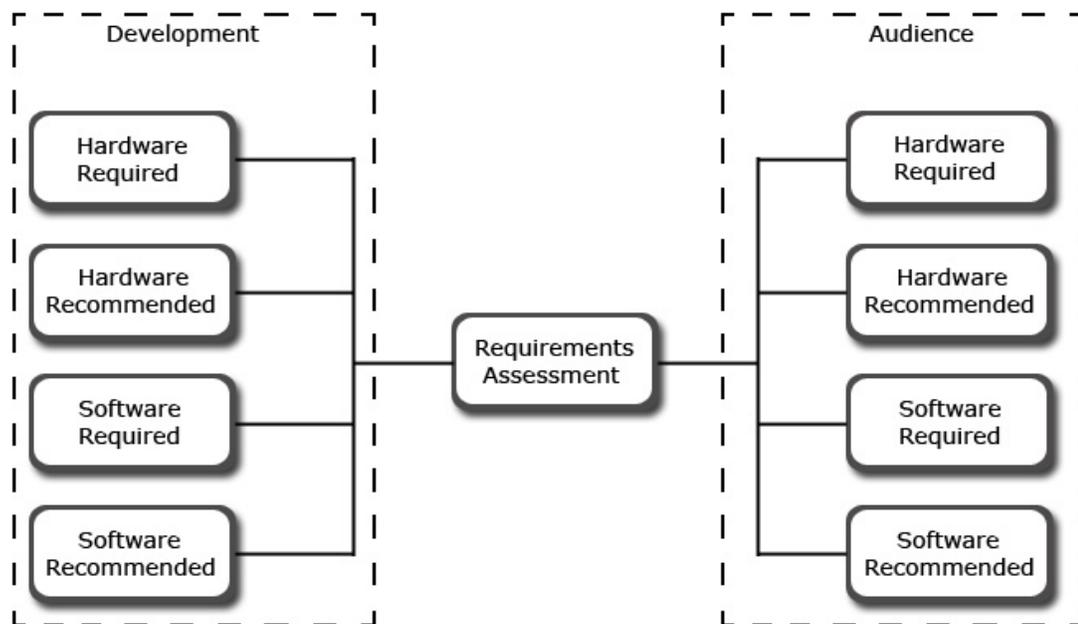


Figure 4: Requirements Assessment of the Project Tactical

The Technical Specifications

The technical specifications section, as recalled from Figure 1, serves to specifically identify the operating development and production environment of the project as seen in Figure 5.

This section will be subject to change as the project progresses (for example, while database names, tables or stored procedures may not be known at the time the project begins, those details will surface over time and should be placed into the technical specifications for reference by other individuals involved in that aspect of the project as well as for future maintenance and evaluation). Other areas, such as RDP, VPN, FTP, Web Services to employ (if any), existing documentation, programming languages to use and so forth should already be known before (or shortly after) the project begins.

Development

- **Database Points**
 - Database server name, database server OS and version, database software components, database server network location (database name, database table name(s), database stored procedures, database stored procedures purpose).
 - Internal RDP (Remote Desktop Protocol) information needed to connect to database server from within network.
 - External VPN (Virtual Private Network) information needed to connect to database server from outside network.
 - Internal method to connect to database server from within network (if RDP will not be used).
 - External method to connect to database server from outside network (if VPN/RDP will not be used).
- **Web Service Points**
 - Local service component name, local service component network location, local service component programming language compatibility.
 - Local (or URL) web service SDK (software development kit) repository location, login Information needed to access SDK (if needed).
 - Remote component name, remote component connection URL, remote authentication key (needed to interact with remote service), remote authentication account (needed to interact with remote service), remote authentication password (needed to interact with remote service).
- **Web Server Points**
 - Web server name, web server OS and version, web server network location, web server URL.
 - Web server secure certificate type, certificate provider, certificate renewal date, certificate cost.
 - FTP client type (SSH client, or standard client), remote FTP starting directory, login, password, authentication type, access port.
 - Internal RDP (Remote Desktop Protocol) information needed to connect to web server from within network.
 - External VPN (Virtual Private Network) information needed to connect to web server from outside network.
 - Internal method to connect to web server from within network, such as a UNC path (if RDP will not be used).
 - External method to connect to web server from outside network (if VPN/RDP will not be used).
- **Programming Points**
 - List of programming languages that will be utilized to complete the project executed on the client.
 - List of programming languages that will be utilized to complete the project executed on the web server.

- List of web server software components needed for project.
- Physical directory structure and purpose of directories.
- Special permissions / machine accounts needed for project code to operate correctly and locations where permissions / machine accounts need to be applied.

Production

- **Database Points**
 - Database server name, database server OS and version, database software components, database server network location (database name, database table name(s), database stored procedure, database stored procedure purpose).
 - Internal RDP (Remote Desktop Protocol) information needed to connect to database server from within network.
 - External VPN (Virtual Private Network) information needed to connect to database server from outside network.
 - Internal method to connect to database server from within network (if RDP will not be used).
 - External method to connect to database server from outside network (if VPN/RDP will not be used).
- **Web Service Points**
 - Local service component name, local service component network location, local service component programming language compatibility.
 - Remote component name, remote component connection URL, remote authentication key (needed to interact with remote service), remote authentication account (needed to interact with remote service), remote authentication password (needed to interact with remote service).
- **Web Server Points**
 - Web server name, web server OS and version, web server network location, web server URL.
 - Web server secure certificate type, certificate provider, certificate renewal date, certificate cost.
 - List of web server software components needed for project.
 - Special permissions / machine accounts needed for project code to operate correctly and locations where permissions / machine accounts need to be applied.
 - Physical directory structure and purpose of directories.
 - FTP client type (SSH client, or standard client), remote FTP starting directory, login, password, authentication type, access port.
 - Internal RDP (Remote Desktop Protocol) information needed to connect to web server from within network.
 - External VPN (Virtual Private Network) information needed to connect to web server from outside network.
 - Internal method to connect to web server from within network, such as a UNC path (if RDP will not be used).
 - External method to connect to web server from outside network (if VPN/RDP will not be used).

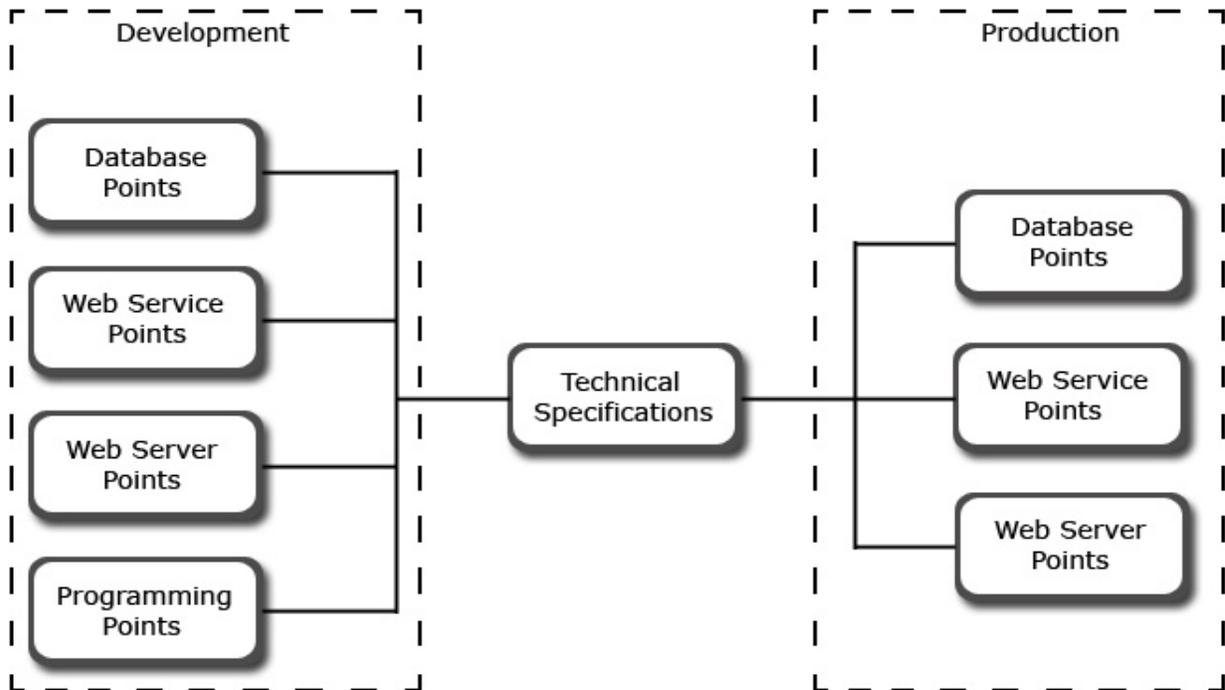


Figure 5: Technical Specifications of the Project Tactical

As you have seen, the Project Tactical is a combination of the strategic interests of a project (as realized by top and/or middle management) and systematic (tactical) considerations of those interests producing an in-depth and concise project document that are to be utilized not only by middle and lower management, but equally amongst the individuals who will take the project from concept to reality. The Project Tactical is designed to complement existing project management tools by providing a highly detailed framework for project individuals to increase efficiency, effectiveness and synchronized collaboration and project knowledge.