Managing Projects When Your Title Isn’t Project Manager

We’ll get started soon...

Do you hear music playing?
If not, take a moment to adjust your audio settings

Managing Projects When Your Title Isn’t Project Manager

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University Information Services

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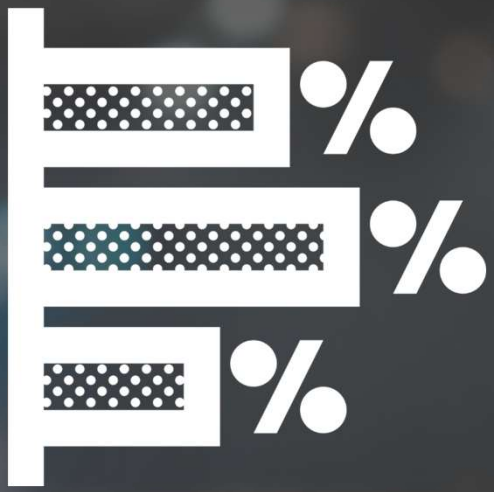
Principal Project Manager
University Information Services

Kenyetta Rose
Financial Training & Support Specialist
Financial Services and Solutions
Office of University Controller

WE WILL HAVE SOME

POLL QUESTIONS



WE WILL SHARE A
RECORDING

QUESTIONS?

Use the Q&A Button

Q&A Button

CPE Reminder

Email fss@cu.edu to request CPE credit

Session Agenda

- Signs you might be an unofficial Project Manager
- What is a “project?”
- Basic project terminology
- Leading teams (without formal authority)
- Using milestones and creating timelines
- Get help from your PM/PMO colleagues

Are you (sometimes) a Project Manager?

Signs you know you might be an unofficial Project Manager:

- Colleagues/leaders look to you for updates on a project/work effort, including timelines, progress made, documentation, etc.
- You are the primary person scheduling and/or running relevant meetings
- Anything else you have experienced?

What is a project?

In short, a project is a work effort that is temporary (has an estimated start and end date), some definition of scope (what you are going to do), and a fairly defined team of people who will regularly spend time on the effort.

- The timeline might shift, but the effort won't go on forever.
- The work (scope) may shift *somewhat*, but there is some defined "list" of work.
- The team may also be assigned to other work or projects, but the team is often *relatively* consistent throughout the effort (unless there are multiple phases).

POLL QUESTION #1

Project Terminology: Top terms to know

Scope:	The work you plan to do and/or the content or product you will deliver.
Scope creep:	New or additional work being added to the project.
Waterfall:	A linear/sequential project framework that intends to plan the full project out before starting the work. Initiation > Planning > Execution > Closing.
Gantt chart:	A bar-type visual of the project work/tasks, showing the work in a linear fashion against the timeline (mostly used w/waterfall).
Agile:	An iterative approach that emphasizes flexibility and customer feedback, using small incremental cycles/releases. Often uses 1-4 week "sprints."
Sprints:	A fixed, time period in which a team completes/releases a set amount of work. 1-4 week sprints are most common.
Milestones:	A significant point or event that marks progress toward completion. It's not a task but a checkpoint/achievement of a major deliverable.
Project charter:	A document that outlines the major aspects of the project and is typically used to formally "approve" the project to begin work.

POLL QUESTION #2

Leading Teams: Principles & Practices

Key Leadership Principles

- Communicate clearly and often
- Foster accountability and trust; build relationships with key people
- Align on roles and Responsibilities (RACI)
- Motivate, collaborate, remove impediments
- Ensure leadership alignment early

Practical Actions

- Encourage open dialogue & feedback
- Consider ice breaker activities
- Recognize contributions
- Proactively manage risks
- Document and escalate risks
- Be flexible and adaptive
- Build and maintain relationships

Project Name: Microsoft Teams Phones

Project Roles & Responsibilities Matrix

Document Creation:
The role is...
R = Responsible for completion of deliverables
A = Accountable for completion of deliverables
C = Consulted by those responsible for advice and expertise
I = Informed - kept updated on progress and notified when tasks are completed

Remember - only 1 can be accountable, multiple can be responsible

	Project Role	Name(s)	Risk Assessment	Project File	Roles & Responsibilities	Functional Requirements	Vendor Management	Test Cases	Technical Requirements	Security Assessment	Accessibility Assessment	Architecture Review	Risk Register	Project Schedule	Org Change Mgmt Plan	Communication Plan	Training Plan	Test Plan	Transition to Operations	Status Reports	Change Requests	Go/No-Go Assessment	Lessons Learned
			Project Deliverables																				
UIS Project Team	Executive Sponsor	Tony Brooks	C	C	I	I	A	I	I	I	A	I	I	C,I	C	C	C,I	I	C,I	I	I	C	
	Project Sponsor	William Shelby Jr.	C	C	C	C	R,A	C	I	R,I	I	R,I	C	C,I	C,I	C	C,I	C,I	C,I	C	C	C	C
	Project Manager	Steven Linenberger	R,A	R,A	R,A	C,I	C,I	I	I	I	C,I	I	R,C	R,A	C,I	I	I	I	C	R,A	R,A	R	R
	PMO Team Manager	Cindy Kraft Hans Smits	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
	Integrations Architect	Al Wirtes			C,I	I		I	I	I		A	R,I	I	I								
	ECS Systems Engineer	Adam Newby																					
	ECS Enterprise Apps Administrator	Brandon Sine																					
	Communications Lead	Deirdre Keating														R,A							
	Security Analyst	Keith Lehigh								R,A			C								C	I	I
	OCM Lead	Lara Ackerman													R,A								
	CRM Delivery Salesforce Administrator	Marc Donahue	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
	Comms Team	Ryanne Scott																					
	QA Management	Sasi Surikari																					
	QA Test Lead	Tanya Scott			C,I			A			R,I		R,I	R,I	I								
	ECS Enterprise Apps Administrator	Tony Sengphirom																					

Identifying and Using Milestones

What is a Milestone?

- A significant checkpoint
- Achievement of a major deliverable or phase

Why Milestones Matter

- Visibility for stakeholders
- Alignment across teams
- Decision points
- Risk management
- Timeline anchors

How to Identify & Use Milestones

- Review phases and deliverables
- Include dependencies
- Validate with stakeholders
- Assign ownership
- Communicate and update
- Use visual tools

UIS FAMLI Milestone Tracking

Deliverable	Timeframe	Notes	Status
OnBase Application built & user tested by 11/1	10/12-11/1	Ready for 11/15 launch	✓
Payroll FAMLI earning codes configured, unit tested	10/16-10/23	Partial SIT possible	✓
ES Time entry is configured, unit tested	10/16-11/3	Start delayed	Yellow
HRGL payroll speedtypes configured, unit tested	10/16-11/3	Partial SIT possible	Green
MyLeave data entry configured, unit tested	10/16-11/8	Partial SIT possible	Green
All PS/HCM config/dev complete and unit tested	**11/8**		Green
PS/HCM end-to-end SIT testing complete/passed	11/9-**11/17**	TST (PY2 backup)	Green
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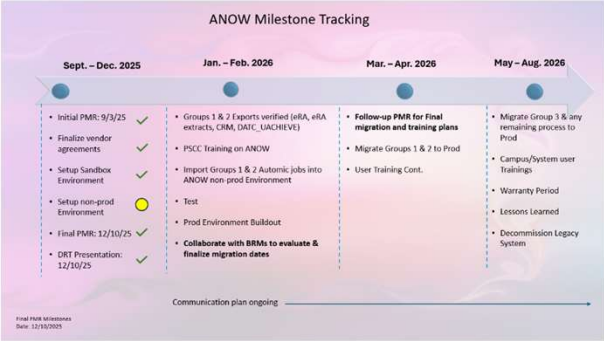
All scope ready for Jan. 1



POLL QUESTION
#3

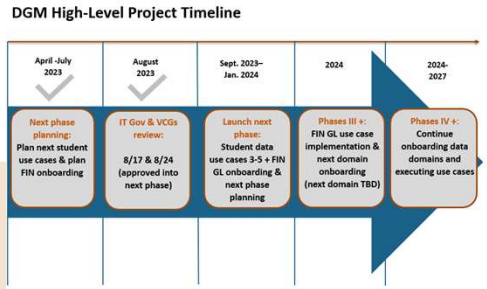
Creating a Timeline

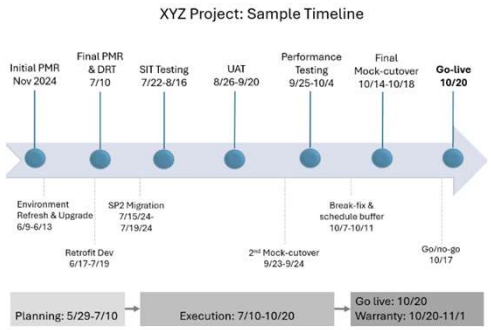
Tip #1: Have a timeline (fancy or simple) and show it frequently

- Once you know major dates/milestones, create a timeline
- Show the timeline frequently in meetings/discussions (repetition makes it stick)

High Level Timeline

IMR Date: 10/29/2025
Planning Phase: 2 weeks
Execution Phase: 11/15/2025 to 04/15/2025
Closing Phase: 04/15/2025





Tip #2: Know the level of detail for your audience when presenting information

- The core team may want more details in a timeline and other documentation
- For leadership, keep visuals/docs high-level and quickly “digestible”

Get Help from your PMO/PM Colleagues

Reach out to people who are formal Project Managers

- Reach out to “official” PMs in your department, campus, etc. We are nerds and typically love talking shop and helping others
- Ask for templates (timelines, work plans/WBS, meeting notes, etc.)

Do some training, attend a local conference/event, etc.

- Read a book (try “Project Management for the Unofficial Project Manager”)
- Watch videos on LinkedIn Learning, webinars, etc.
- Attend a local conference (try: PMI Mile High Symposium April ‘26)
- Aim for general/broad content, vs. specific methodologies in most cases

Use Generative AI as a supporting tool

- Use Generative AI tools like Copilot to help you with project visuals/deliverables
- Review any AI-generated content before sharing with a broader audience

Take small steps to evolve your PM skills/approach. Clear but simple goes a long way.

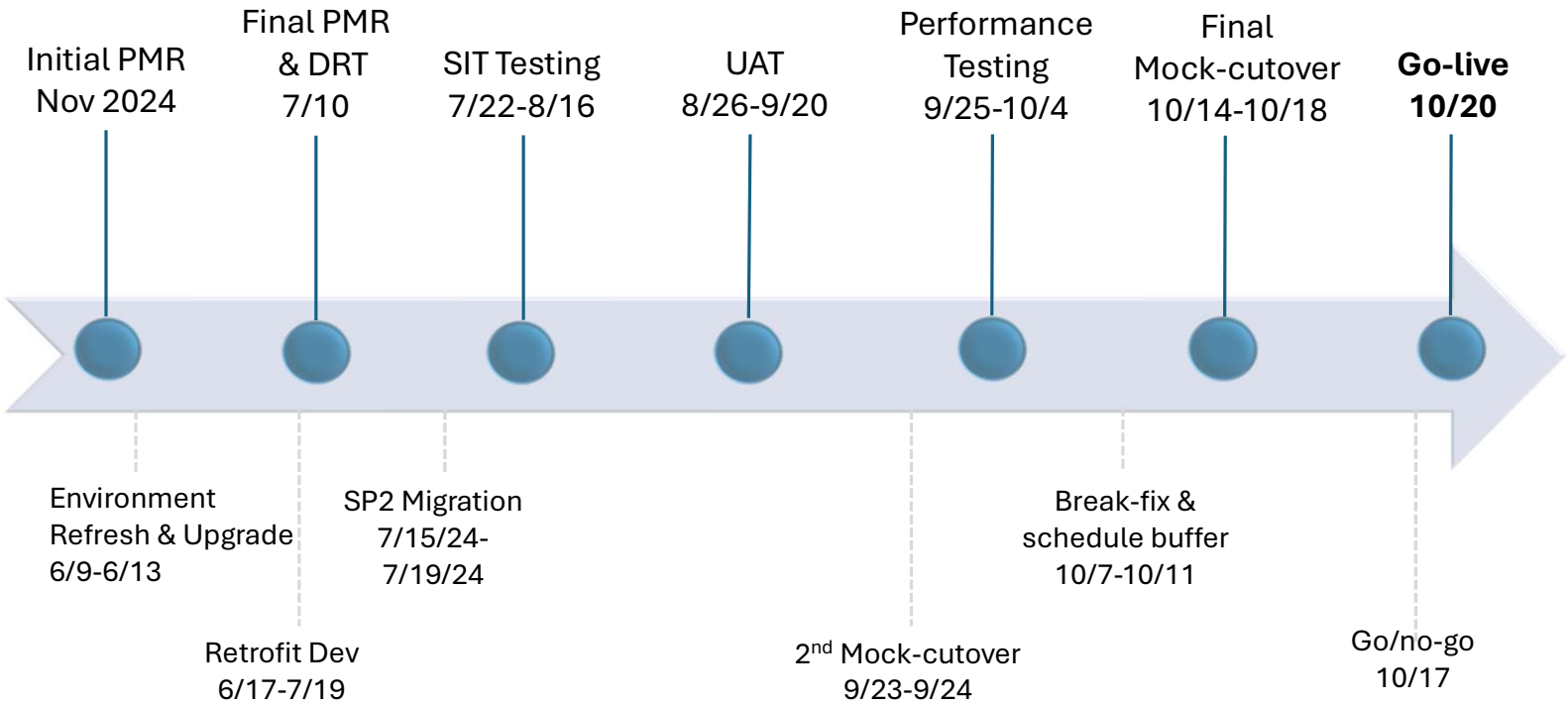
POLL QUESTION #4

Questions and discussion

Appendix

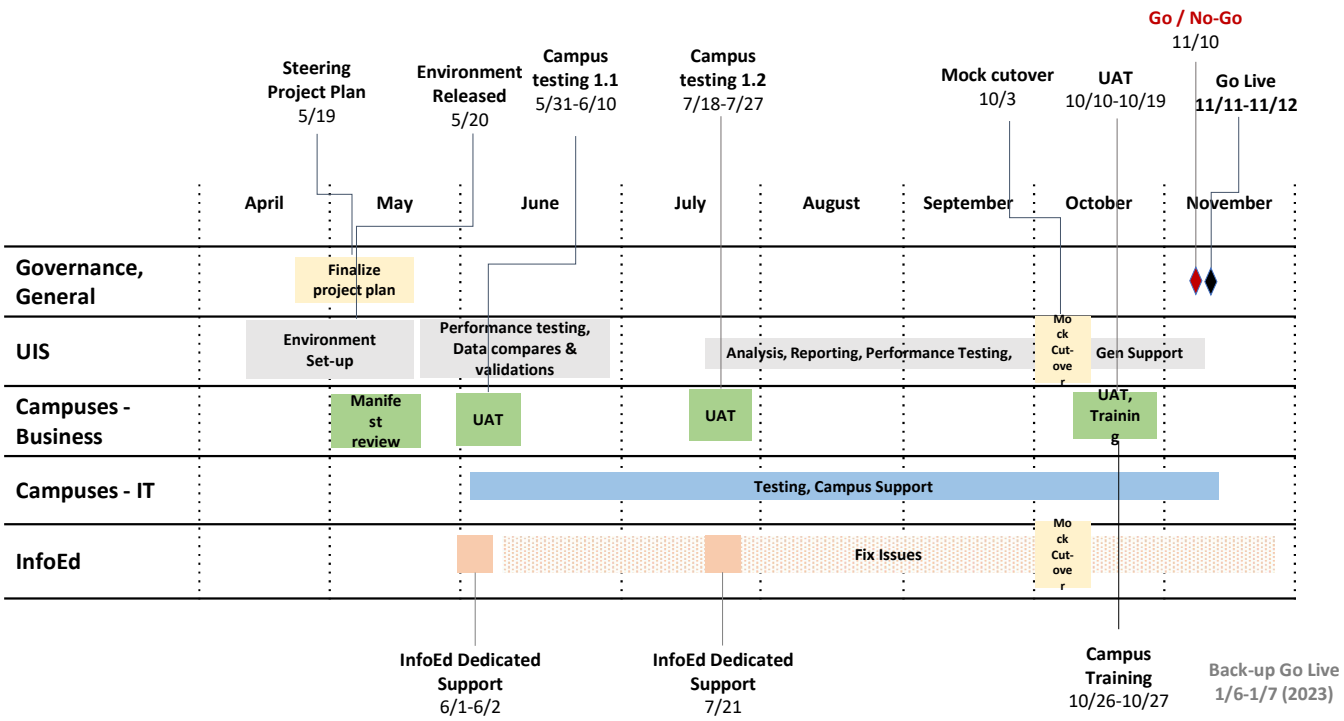
Appendix I: Timeline Template Options

Sample Timeline



Planning: 5/29-7/10 → Execution: 7/10-10/20 → Go live: 10/20
Warranty: 10/20-11/1

Sample Timeline

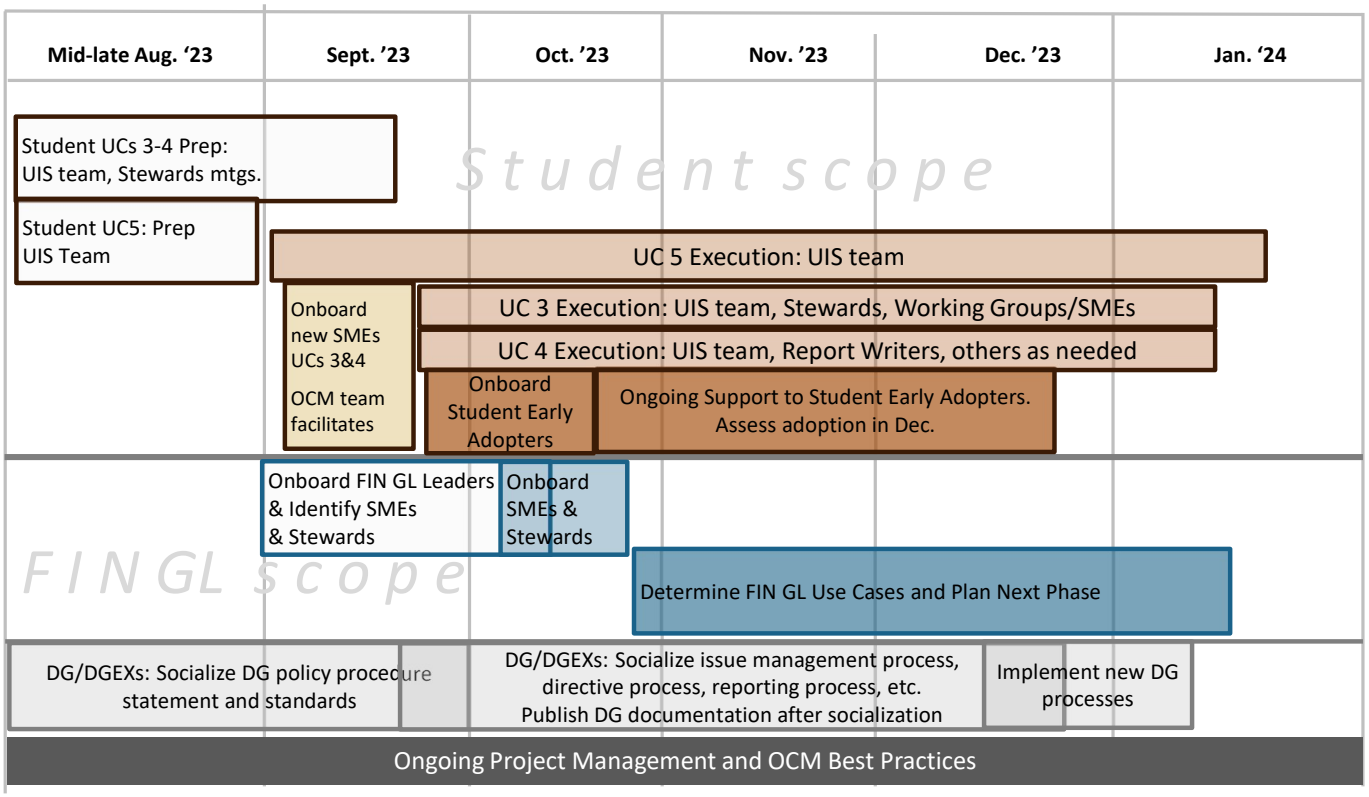


Sample Timeline

Scope	Sept. ’23	Oct. ’23	Nov. ’23	Dec. ’23	Jan. ‘24
Nov. 15: OnBase App	Finish build & unit test	SIT, UAT	Training, Comms, Go-live	Mods based on state’s form release	
PS/HCM Scope: • ***Employee* time entry** • **Payroll** •**ES Time Entry** • **Funding & HRGL**	Planning: Determine approach ✓, capture requirements	Config & Unit testing	SIT**	UAT** (incl. mock payroll)	KT, Docs, Training, Comms	Post-rollout support TBD **End-to-end testing
AbsenceSoft Limited MVP*	Assess limited scope and timeline with vendor and UIS ✓	Install & Limited Config	Test file feed	ES UAT	Training, Comms	
AbsenceSoft Full Implementation				Planning: Assess scope and timeline. Set final PMR date →	
	ES scope related to policy, change management, vendor mgmt., comms, etc.				

*Limited, tight scope for MVP

Sample Timeline



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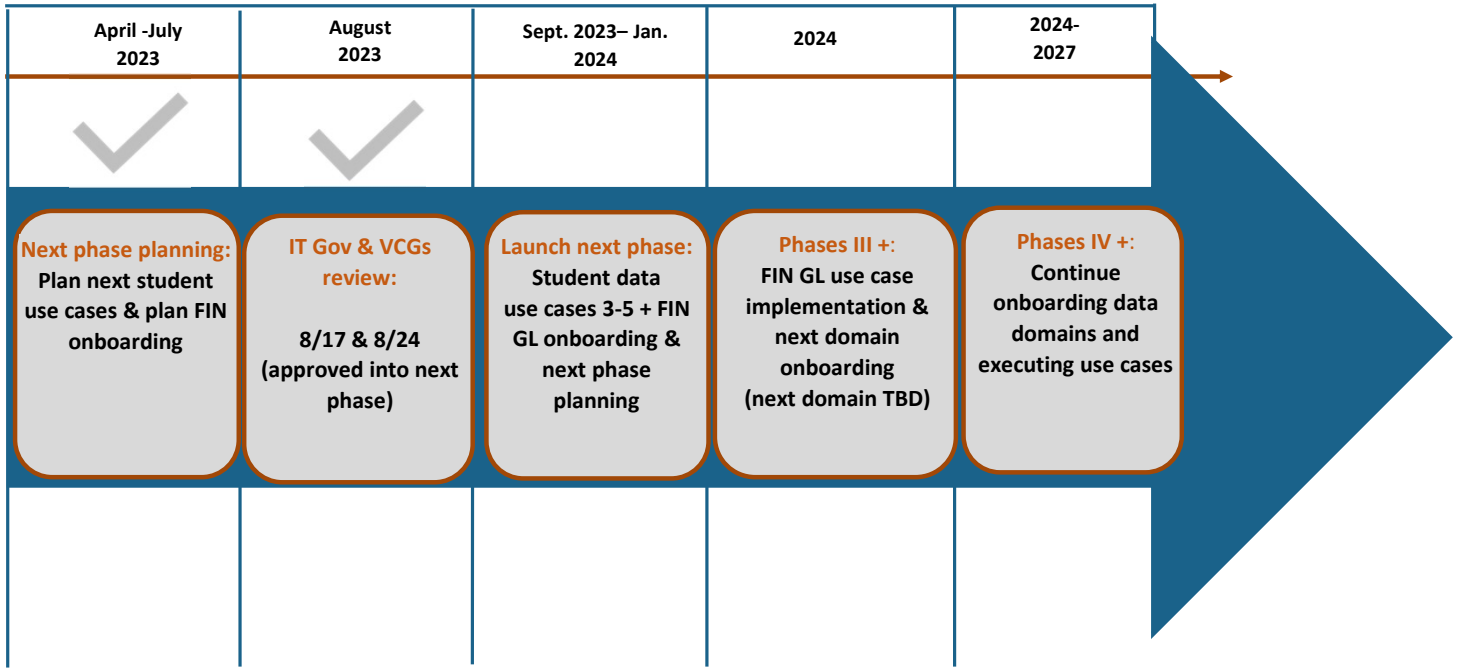
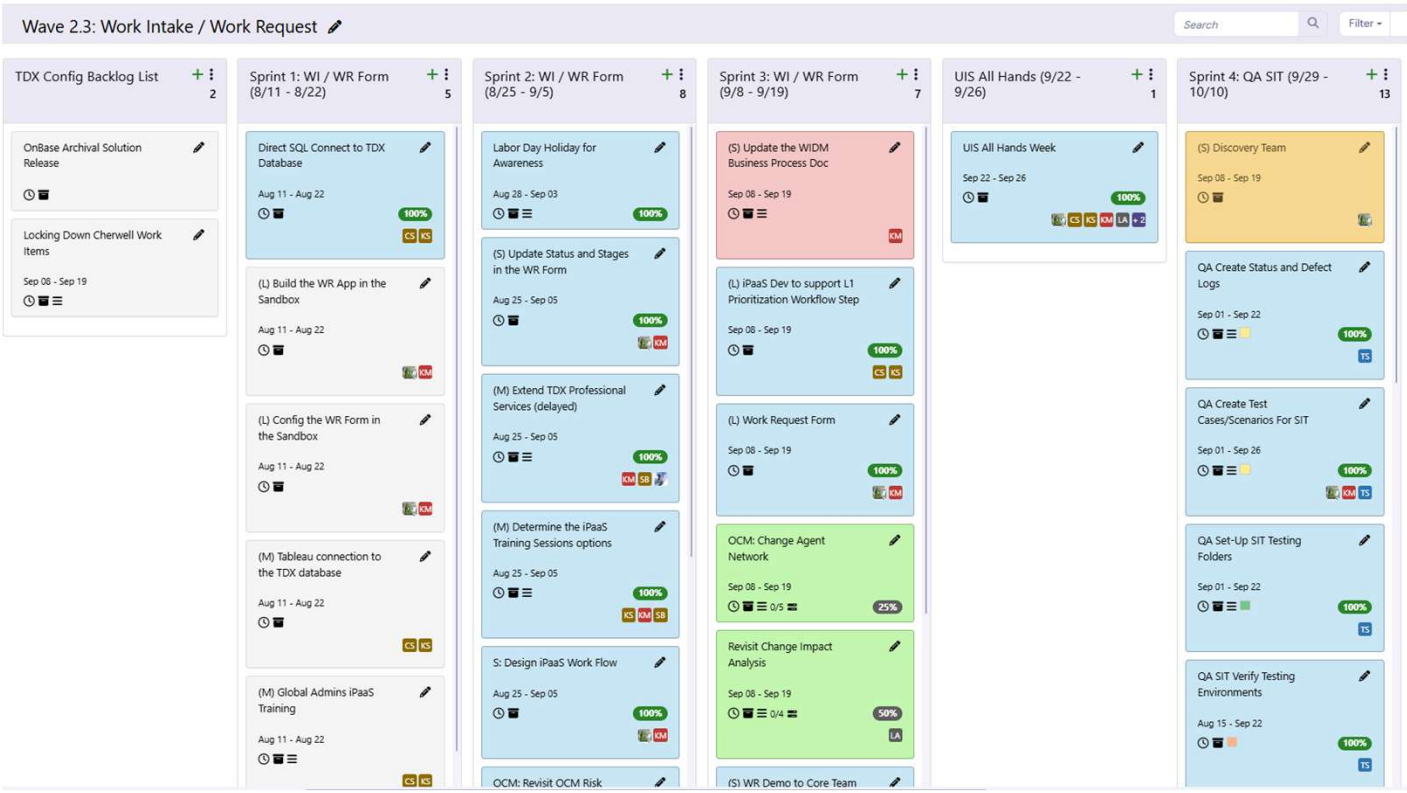


Sample Gant-Chart Project Plan

High-level scope	Workstream and Deliverables	Task/milestone	Review/ Approval 1	Review/ Approval 2	9/19	9/26	10/3	10/10	10/17	10/24	10/31	11/7	11/14	11/21	11/28	12/5	12/12	12/19	12/26	1/2	1/9
					MVS)																
Initial Planning:	FSFP current state assessment	Steering approve working groups and decision structure, and high-level project		Steering 8/1																	
IT Gov/PM Deliverable	CU Deliverable	Draft IT Gov (CU) charter for the MVS	Sponsors mid-August	Steering ??																	
Initial Planning:	Leadership and Stakeholder Alignment	Review/approve leadership/stakeholder alignment assessment	Sponsors	Steering 8/19																	
Initial Planning:	Operating Model Assessment	Review/approve Operating Model Review	Sponsors	Steering 9/8																	
Initial Planning:	CU Deliverable	CU BA conduct deeper current state/Biz Process Mapping (system and campus-level)	Cindy	SDPWG				X													
Collibra Product	CU Deliverable	UIS DRT for MVS and Collibra DEV (prep and present)	UIS 10.12	N/A				X													
DG Model	Use Case Prep	Determine and approve Use Case 1	SDPWG	Steering 10/21						UC 1 X											
Use Cases	Use Case Prep	WG complete Collibra training (webinars, boot camps)	SDPWG	N/A							X										
Collibra Product	CU Deliverable	CU tech team (UIS) prep for Collibra install (attend webinars, discuss architecture, etc.)	UIS	August				X													
Use Cases	Use Case definitions/metrics	Analyze overlap or opportunity to expand our Canonicals (this may be just UIS team only)	UIS	SDPWG																	
Collibra Product	CU Deliverable	Collibra initial install/config: Edge, then SAML	UIS	Late August/early						Edge X	SAML X										
Use Cases	Use Case Prep	Carla complete add'l Collibra training w/FSFP	UIS BA	N/A								X									
Collibra Design-trng	Collibra Community and Domain Design	Conduct Community and Domain Design Workshops (16 hours)	SDPWG	N/A					X												
Collibra Design-trng	Collibra Community and Domain Design	Review Collibra Domain design and Asset Model - ensure clarity/approval	SDPWG 10/27	N/A							X										
Use Cases	Use Case Decisioning	Steering review/approve Use Case 2 and receive first high-level Collibra training		Steering 11/4							X										
Collibra Design-trng	Collibra Community and Domain Design	Collibra design review/approval	SDPWG	Steering									X								
Use Cases	Use Case definitions/metrics	Review/approve impact/progress metrics (needed to re-visit in 1/2023)	Sponsors	Steering 12/2											X						
Collibra Product	CU/FSFP Deliverable	CU team set up Boulder environment, access, and prepare onboarding	Carla & Mayank	Early-Mid Dec.													X				
Use Cases	CU Deliverable	CU MVS User experience and UAT/QA planning	Tanya, Carla, Lara,	Art?																X	
IT Gov/PM Deliverable	OCM Plan	CU MVS updated Risk register	Sponsors	Steering														X			
Collibra Product	Collibra Connectors: Oracle	Establish connections, validate, test, document	FSFP	CU Team																X	
Use Cases	Use Case 2 exploration	Online/multimodal group explore/define use case	UC 2 working	N/A																	X
Use Cases	Long-term definitions/metrics	Review/approve MVS success metrics	Sponsors X	Steering 1/11/23																	X

Legend
Complete X
Forecasted
On track
Risks
Adjustments
Holiday

Sample Card Wall (Agile Methodology)



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Microsoft Teams Phone RACI Chart

Project Name: Microsoft Teams Phones

Project Roles & Responsibilities Matrix

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	Project Sponsor	William Shelby Jr.	C	C	C	C	R,A	C	I	R,I	I	R,I	C	C,I	C,I	C	C,I	C,I	C,I	C	C	C	C
	Project Manager	Steven Linenberger	R,A	R,A	R,A	C,I	C,I	I	I	I	C,I	I	R,C	R,A	C,I	I	I	I	C	R,A	R,A	R	R
	PMO Team Manager	Cindy Kraft Hans Smits	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I	I
	Integrations Architect	Al Wirtes			C,I	I		I	I	I		A	R,I	I	I								
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	Comms Team	Ryanne Scott																					
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RESOURCES

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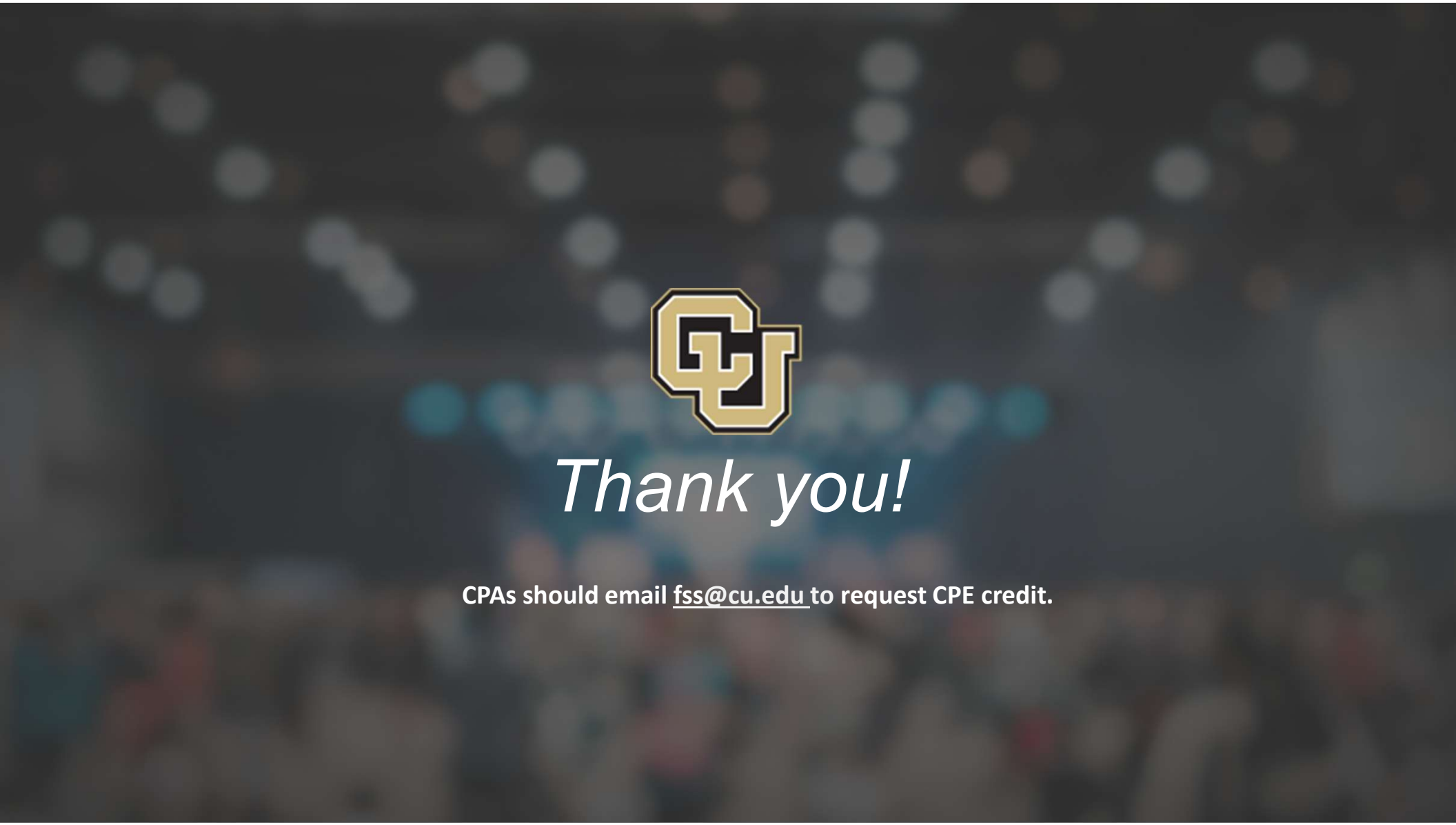

Thank you!

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