Project Management Essentials: Skills for Success

Visit the flip charts and post your answers to the two questions

Meet a few folks, and find a seat!

We will begin promptly at 8:00am!
Project Management Essentials: Skills for Success

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Michael Pace
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Table Introductions Slide

• Name
• College/Business
• Project Management Experience
• What is your greatest Project Management challenge right now?
Our Focus Today

• This workshop **IS NOT** designed to:
  • make you a certified Project Manager
  • teach you all 47 processes outlined in the PMBOK
Our Focus Today

• This workshop IS designed to help you:
  • Gain a better understanding of project management terminology
  • Understand the phases of project management
  • Identify key processes in each phase that contribute to project success
  • Acquire tools and techniques to be more successful managing projects!
Overview of Today’s Workshop

• Projects & Project Management
• Project Phases
• Tips & Tricks
• Exercises
What is a Project?
What is a Project?

Examples:

- A college campus upgrades its technology infrastructure to provide wireless Internet access.
- A pharmaceutical company launches a new drug.
vs Operations...

Operations

- On Going
- Business Process/Operational Management
- Produces The Same Product Repetitively
What is Project Management?

Project Management is “the application of knowledge, skills, tools & techniques to project activities to meet project requirements”
Why Project Management?
Project Management Constraint

- Risk
- Budget
- Scope
- Quality
- Time
- Resources
ULTIMATE Practical Project Management

*Using Processes defined in the PMBOK® Guide Fifth Edition

Process Groups
- Initiating
- Planning
- Executing
- Monitoring & Control
- Closing

Steps
1. Initiate Project
   - Feasibility Determination
   - Requirements Documentation
   - Project Charter
   - Stakeholder List
   - Core Team Assignment
   - Communication Plan

2. Plan Project
   - Activity List
   - Activity Sequencing
   - Resource Requirements
   - Breakdown Structure
   - Schedule (Baseline Doc)

3. Validate Project Controls
   - Scope
   - Schedule
   - Cost
   - Quality
   - Risk

4. Finalize Project Plan
   - Full Team
   - Approved Plan

5. Perform Work
   - Work Results
   - Vendor Work Results
   - Identified Changes
   - Quality Assessment
   - Project Status
   - Team Performance Improvement
   - Issue Resolution

6. Control Project Performance
   - Approved Changes
   - Risk Responses
   - Approved Work Results
   - Performance Reports
   - Performance Improvement

7. Deliver Product
   - Completed Work
   - Closed Vendor Contracts
   - Final Product
   - Closed Project
   - Release of Resources
   - Lessons Learned
   - Archives

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Methodology - Best Fit

Project Activities

CHOOSE YOUR OWN ADVENTURE®
“AGILE” – YOU KEEP USING THAT WORD

I DO NOT THINK IT MEANS WHAT YOU THINK IT MEANS
Project Management Phases Intro

Initiating:
- Charter project
- Analyze stakeholders and plan communication

Planning:
- Develop Work Breakdown Structure
- Assign resources
- Gather estimates
- Schedule

Executing, Monitoring, and Controlling:
- Manage change
- Follow up on tasks and enforce schedule
- Manage risks and issues
- Manage scope
- Communicate
- Manage performance

Closing:
- Lessons learned
- Handoffs
- Close project
Project Management Phases Intro

Phase 1
- Initiation
- Planning
- Execution
- Close

Phase 2
- Initiation
- Planning
- Execution
- Close

Phase 3
- Initiation
- Planning
- Execution
- Close
Initiation

The initiation phase is the beginning of the project. In this phase, the analysis of the project is explored and elaborated.
Charter

Project Charter refers to a statement of objectives, which sets out detailed project goals, roles and responsibilities, and identifies the main stakeholders.
A stakeholder is anyone who can affect or is affected by the project.
Charter

- Major participants
- Project charter
  - Objectives
  - Scope
  - Measurements
- Project manager authority
- Assumptions and restrictions
Stakeholder

Meet Their Needs
- Engage and Consult
- Increase/maintain level of interest
- Aim is to move them to the right
- Could be a risk to your idea

Key Player
- Manage closely
- Involve in projects and decisions
- Engage on a regular basis and work to maintain the relationship

Low Priority
- Monitor
- Communicate generally to keep updated
- Aim to move to the right

Keep Informed
- Make use of interest through involvement
- Consult on their area of interest
- Can be a supporter/ambassador

Influence/Power of Stakeholder

Interest of Stakeholder
Traditional vs. Agile Stakeholders

**Traditional**
- Big Involvement Up-Front
- Less involvement during execution
- Less time available
- More risk of delivery surprises

**Agile**
- Big Involvement throughout
- Requires greater time commitment
- Less risk of delivery surprises
## Example Stakeholder Analysis

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Stake in the project</th>
<th>Impact / Influence</th>
<th>What do we need from them?</th>
<th>Perceived attitudes / risks</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Director</td>
<td>Policy and process owner who determines institutional administrative policy and procedures</td>
<td>High / High</td>
<td>Experienced staff to be involved in user group and user acceptance testing. Commitment to implementing change.</td>
<td>Lack of clarity about preferred approach. Views project team as too technically oriented.</td>
</tr>
<tr>
<td>Operations Managers</td>
<td>Manage admin staff who will operate the new system at local level</td>
<td>Medium / Low</td>
<td>Commitment to implementing change.</td>
<td>Lack of interest in project.</td>
</tr>
<tr>
<td>Admin Staff</td>
<td>Will operate new system</td>
<td>High / Low</td>
<td>Contribute to system and process design and testing.</td>
<td>Concern about increased workload. Worried about what training they will receive.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Stakeholder Management Strategy</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Director</td>
<td>Involvement in Project Steering Board, Regular updating meeting with project leader.</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Operations Managers</td>
<td>Involvement in briefing sessions at business unit meetings.</td>
<td>Project Sponsor</td>
</tr>
<tr>
<td>Admin Staff</td>
<td>Involvement in user groups.</td>
<td>Project Team</td>
</tr>
</tbody>
</table>
# Stakeholder Registry Document

<table>
<thead>
<tr>
<th>Stakeholder Registry</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Name:</strong></td>
</tr>
<tr>
<td><strong>Project Phase:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of Stakeholder</th>
<th>Designation</th>
<th>Department</th>
<th>Role in the Project</th>
<th>Type of Stakeholder</th>
<th>Type of Communication</th>
<th>Expectations</th>
<th>Interest of Project</th>
<th>Influence on Project Outcome</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>
Your Workbook

• Example Charter included
  • Scope of Work
  • Stakeholders
  • Signature Page

Your Activity:
Complete Stakeholder Identification.
Planning

Planning is the most detailed and important part of Project Management, including the development of “detailed” plans required to manage the implementation of the project.
The dashed circular arrow indicates that the process is part of the Project Integration Management Knowledge Area. This Knowledge Area coordinates and unifies the processes from the other Knowledge Areas.
Project Management Plan

Scope Planning
Schedule Planning
Risk Management
Communication Planning

Outline & Practice
Change Control
Scope -> WBS -> Schedule
Risk Register
Templatize!
Project Management Plan

- Procurement
- HR
- Quality
- Cost

Check for a Division Policy?
Scope Management

Section 1: Project Summary, Deliverables and Scope Excludes

Project Summary

<Provide a brief summary of the project. Include both the purpose of this project and its business justification.>

Deliverables

<Deliverables are tangible products, processes, or things that the project will produce, stated at a high level. They describe what is included in the scope and what the business will get when the project is done. The owner of a deliverable should be a single name. Provide a list the deliverables below.>

<table>
<thead>
<tr>
<th>Deliverable #</th>
<th>Description</th>
<th>Owner</th>
<th>Business Goal/Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Del 1]</td>
<td>[A new service]</td>
<td>[Enter owner of deliverable name]</td>
<td>[Expansion of Services offered]</td>
</tr>
</tbody>
</table>

Scope Excludes

<It is important to also state exclusions, or what will not be included in the project. List the exclusions along with their reasons.>

<table>
<thead>
<tr>
<th>Exclusion</th>
<th>Exclusion Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### WBS Examples

<table>
<thead>
<tr>
<th>Level</th>
<th>WBS Code</th>
<th>Element Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Bicycle</td>
</tr>
<tr>
<td>2</td>
<td>1.1</td>
<td>Frame Set</td>
</tr>
<tr>
<td>3</td>
<td>1.1.1</td>
<td>Frame</td>
</tr>
<tr>
<td>3</td>
<td>1.1.2</td>
<td>Handlebar</td>
</tr>
<tr>
<td>3</td>
<td>1.1.3</td>
<td>Fork</td>
</tr>
<tr>
<td>3</td>
<td>1.1.4</td>
<td>Seat</td>
</tr>
<tr>
<td>2</td>
<td>1.2</td>
<td>Crank Set</td>
</tr>
<tr>
<td>2</td>
<td>1.3</td>
<td>Wheels</td>
</tr>
<tr>
<td>3</td>
<td>1.3.1</td>
<td>Front Wheel</td>
</tr>
<tr>
<td>3</td>
<td>1.3.2</td>
<td>Rear Wheel</td>
</tr>
<tr>
<td>2</td>
<td>1.4</td>
<td>Braking System</td>
</tr>
<tr>
<td>2</td>
<td>1.5</td>
<td>Shifting System</td>
</tr>
<tr>
<td>2</td>
<td>1.6</td>
<td>Integration</td>
</tr>
<tr>
<td>3</td>
<td>1.6.1</td>
<td>Concept</td>
</tr>
<tr>
<td>3</td>
<td>1.6.2</td>
<td>Design</td>
</tr>
<tr>
<td>3</td>
<td>1.6.3</td>
<td>Assembly</td>
</tr>
<tr>
<td>3</td>
<td>1.6.4</td>
<td>Testing</td>
</tr>
<tr>
<td>2</td>
<td>1.7</td>
<td>Project Management</td>
</tr>
</tbody>
</table>

#### Level 1

1 Bicycle

1.1 Frame Set

1.1.1 Frame

1.1.2 Handlebar

1.1.3 Fork

1.1.4 Seat

1.2 Crank Set

1.3 Wheels

1.3.1 Front Wheel

1.3.2 Rear Wheel

1.4 Braking System

1.5 Shifting System

1.6 Integration

1.6.1 Concept

1.6.2 Design

1.6.3 Assembly

1.6.4 Testing

1.7 Project Management

#### Level 2

1 Bicycle

1.1 Frame Set

1.1.1 Frame

1.1.2 Handlebar

1.1.3 Fork

1.1.4 Seat

1.2 Crank Set

1.3 Wheels

1.3.1 Front Wheel

1.3.2 Rear Wheel

1.4 Braking System

1.5 Shifting System

1.6 Integration

1.6.1 Concept

1.6.2 Design

1.6.3 Assembly

1.6.4 Testing

1.7 Project Management
Schedule Examples
Risk Management

Risk Response Strategy

Opportunities
- Exploit
- Share
- Enhance
- Ignore

Threats
- Avoid
- Transfer
- Mitigate
- Accept

PROBABILTY
- >66% HIGH
- 33-66% MEDIUM
- <33% LOW

COST
- <10% cost change
- 10-20% cost change
- >20% cost change

TIME
- <5% time change
- 5 - 20% time change
- >20% time change

SCOPE
- Scope change barely noticeable
- Scope change unacceptable to sponsor / steering
- Project deliverable is effectively useless

QUALITY
- Quality degradation barely noticeable
- Quality degradation requires sponsor approval
- Project deliverable is effectively useless
## Risk Management

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Description</th>
<th>Status</th>
<th>Owner</th>
<th>Category</th>
<th>Probability Score</th>
<th>Impact Score</th>
<th>Composite Index</th>
<th>Mitigation Actions</th>
<th>Contingency Actions</th>
</tr>
</thead>
</table>
| 505  | CDN Sync issues at launch     | Site inconsistencies due to CDN Sync issues at launch | Open   | John Doe | Launch   | 3.50              | 2.00         | 7.00            | * Pre-launch test with CDN Partner  
* Launch during off-peak hours to limit exposure  
* CDN Partner to be available in the launch conf call to handle any unexpected issues | * Use CDN Partner's internal test tool to do specific tests  
* CDN Partner to refresh specific instances having issues |
# Traditional vs. Agile Risk Management

<table>
<thead>
<tr>
<th>Traditional</th>
<th>Agile</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Project Impact Statement</td>
<td>● Less Formal</td>
</tr>
<tr>
<td>● More Formal</td>
<td>● Sponsor involved during execution</td>
</tr>
<tr>
<td>● Risk Register</td>
<td>● Risk is framed as blocks</td>
</tr>
</tbody>
</table>
Your Workbook

• Example Project Management Plan documentation included
  • Scope Planning
  • Communication Planning
  • HR
  • Cost
  • Procurement
  • (WBS not included -- come this afternoon!)

Your Activity:
Risk Register, based upon what we know so far about our Wally World trip.
What’d You Come Up With?

<table>
<thead>
<tr>
<th>ID</th>
<th>Risk</th>
<th>Owner</th>
<th>%</th>
<th>Impact</th>
<th>Score (%* I)</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Death</td>
<td>Clark</td>
<td>Low (33%)</td>
<td>High</td>
<td>3 (1 x 3)</td>
<td>Accept - deal with it if it happens</td>
</tr>
<tr>
<td>2</td>
<td>Car Trouble</td>
<td>Clark</td>
<td>Low (33%)</td>
<td>High</td>
<td>3</td>
<td>Mitigate - new car</td>
</tr>
<tr>
<td>3</td>
<td>Falling asleep while driving</td>
<td>Ellen</td>
<td>Medium (66%)</td>
<td>High</td>
<td>6</td>
<td>Avoid - drink coffee!</td>
</tr>
<tr>
<td>4</td>
<td>Getting Lost</td>
<td>Clark</td>
<td>Medium</td>
<td>Medium</td>
<td>4</td>
<td>Transfer - ask for directions</td>
</tr>
</tbody>
</table>
Execution

The Execution phase is all about “getting the work done.”

- PMs don’t do the work, they manage people and processes to ensure project deliverables are met
- 90% of the PM’s time is spent communicating!
Key Processes of the Executing Phase

- Managing the Team
  - Provide skills, knowledge and motivation
- Executing the Project Management Plan
  - Manage the work being done
  - Make changes to plans if necessary
- Monitoring Quality & Performance
  - Are we delivering as expected/promised?
- Providing Project Status
  - Manage Stakeholders expectations
- Monitoring Risk
Project Team Considerations

- Skills/Training Needed?
- Individuals Identified?
- When will they be needed?
- Where are they located?
- Interpersonal Capabilities?
- Individual Needs?
Some Team Tools

- Assess and manage Personalities (Strengths, MBTI, DiSC etc.)
- Team Building must be worked in!
- Communicate!
How Do You Execute the Project Plan?

TRACK

<table>
<thead>
<tr>
<th>ID</th>
<th>Risk</th>
<th>Consequence</th>
<th>Likelihood</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Loss of IT Data</td>
<td>Major</td>
<td>Insignificant</td>
<td>Moderate</td>
</tr>
<tr>
<td>2</td>
<td>Loss of Project</td>
<td>Major</td>
<td>Minor</td>
<td>Rare</td>
</tr>
<tr>
<td>3</td>
<td>Loss of Building</td>
<td>Major</td>
<td>Minor</td>
<td>Unlikely</td>
</tr>
<tr>
<td>4</td>
<td>Delay of Access to Building</td>
<td>Major</td>
<td>Minor</td>
<td>Unlikely</td>
</tr>
<tr>
<td>5</td>
<td>Loss of Key Dependencies</td>
<td>Major</td>
<td>Minor</td>
<td>Unlikely</td>
</tr>
</tbody>
</table>

COMMUNICATE

FOLLOW-UP

ADJUST

Time

Cost

Quality

Scope

V1

Action Items
...A Note on Meetings

8 Keys to Effective Meetings

• Have a purpose
• Invite the right people
• Have an agenda
• Be prepared
• Stay focused
• Take minutes
• Track action items
The Challenge of Communication

3 people, 3 lines

6 people, 15 lines

5 people, 10 lines

8 people, 28 lines

10 people, 45 lines
Document Action Items!

- Must be Written Down
  - Task (What)
  - Owner (Who)
  - Due Date (When)

Tip: If schedule allows, have owner suggest due date
- Don’t assign yourself action items because no one else volunteers
  - Use 5 second rule!
- Have owners update Action Item status
Meeting / Collaboration Tools

- Cisco Webex
- Asana
- Candor
- Slack
- Google Hangouts
- Trello
- Redbooth
- Dropbox
- Convo
- XMind
- Smartsheet
Break
The Marshmallow Challenge

- 3 feet of masking tape
- 20 sticks of spaghetti
- 3 feet of string
- 1 Marshmallow

In eighteen minutes, build the tallest free-standing structure out of 20 sticks of spaghetti, one yard of tape, one yard of string, and one marshmallow. The marshmallow needs to be on top.
Lessons Learned

What does this exercise tell us about teams and project management?
The Marshmallow Challenge
Overview of Agile PM

- What is Agile Project Management?
- Iterative and Adaptive
- The Agile Manifesto
- Focus on Business Value
- Scrum - an example of Agile PM
- Pigs and Chickens
Scrum Sprint Cycle

Scrum Sprint Cycle
1-4 weeks

Product Backlog
Sprint Planning
Sprint Backlog
Sprint Execution
Daily Scrum
Sprint Retrospective
Sprint Review
Potentially Shippable Product Increment

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Lean

Lean Agile Project Management implies that any step in the process that does not contribute business value is to be eliminated. Processes include:

• Eliminate waste
• Amplify learning
• Decide as late as possible
• Deliver as fast as possible
• Empower the team
• Build integrity in
• See the whole
“Close” is the process of finalizing activities at the end of each phase or project. The key benefit of this process is that it provides lessons learned, the formal ending of project work, and the release of organization resources.
Close

- Lessons Learned
- Handing off the project
- Closing
Lessons Learned

- What did we do well?
- What could we improve?
- Mistakes to avoid in the future.
- Problems we could have avoided.
Handoff

- Charter
- Scope Document
- Work Breakdown Structure (WBS)
- Risk Register
- Stakeholder Register
- Lessons Learned
Close

Product
- Confirm product
- Close procurements
- Accept product

Project
- Close finances
- Report closure to stakeholders

Documents
- Update project records
- Archive project records
Celebrate Success!
Your Workbook

- Example Lessons Learned included

Your Activity:
Complete Lessons Learned Analysis...
Books
Websites

• Free Project Management Templates! – http://ProjectManagementDocs.com

• Centers for Disease Control & Prevention Project Templates
  https://www2a.cdc.gov/cdcup/library/templates/

• ProjectManagement.com -- PMI “collaboration” site, with templates, message boards, webinars, quizzes, “games”

• The Team Building Directory - http://www.innovativeteambuilding.co.uk/


• Lynda.com Project Management Playlist
  https://www.lynda.com/SharedPlaylist/6e5655b45f314ca0963618b6199852e8

• NASA Links
  https://ntrs.nasa.gov/archive/nasa/casi.ntrs.nasa.gov/20150000400.pdf
  https://www.nasa.gov/offices/oce/functions/prog_proj_mgmt.html
  http://projectmanagementhacks.com/project-management-strategy-nasa-beyond/

• Walt Disney Links
  http://www.thinkforachange.com/blog/walts-ten-things/
  http://www.business2community.com/business-innovation/disney-imagineering-project-management-01026579#tdTCsHjKMHYerBla.97
  https://www.inloox.com/company/blog/articles/how-to-create-magic-project-management-lessons-from-walt-disney-imagineering/
  https://www.brightwork.com/blog/6-must-watch-ted-talks-for-project-managers#.WJi9xBiZOT8
  https://www.youtube.com/watch?v=0MD4Ymjyc2I
PMP Certification

For complete details regarding the PMP eligibility requirements, please view the PMP Handbook for further details.
Agile Certification

Certified Scrum Product Owner® (CSPO)

Certified Scrum Master® (CSM)

Certified Scrum Developer® (CSD)

Certified Scrum Professional® (CSP)

Certified Scrum Trainer® (CST)

Certified Enterprise Coach (CEC)

Certified Team Coach (CTC)
Wrap-Up

- Workshop critique
THANK YOU!