Project Management Tools & Techniques

Susan W. Carey
Workshop Objectives

• Recognize project management terminology
• Explain roles and responsibilities for key players
• Develop a project proposal
• Construct a work breakdown structure
• Identify tools for tracking and controlling a project
• Recognize the importance of a formal closeout
INTRODUCTION TO PROJECT MANAGEMENT
Module Objectives

• Recite project management terminology
• Describe the characteristics of a project
• Distinguish between a project and sub projects
• Identify the benefits of project management
• Define the roles and responsibilities of the various stakeholders
• Determine what it takes for successful project management
BASICS OF PROJECT MANAGEMENT
Definition of a Project

• A series of inter-related and sequenced activities, managed by a single individual, designed and organized to accomplish a specific goal, within a limited timeframe, frequently with specific budgetary requirements
Remember:

Co-Project Managers
Characteristics of Projects

- Undertaken at all levels
- Single person or thousands
- Duration could be weeks or years
- Single unit or entire organization

Projects are critical to the realization of the performing organization’s business strategy because projects are a means by which strategy is implemented.
Characteristics of Projects

- Are unique
- Consume time
- Cost money
- Requires people
- Contain risks
- Sequence of tasks
Types of Projects

- Developing a new product or service
- Effecting a change in structure, staffing, or style of an organization
- Designing a new transportation vehicle
- Developing or acquiring a new or modified information system
- Constructing or renovating a building or facility
- Building a water system for a community in a developing country
- Running a campaign for political office
- Implementing a new or improved business process or procedure
Subprojects

- Based on project process such as a single phase (e.g. design)
- According to human resource skill requirements (e.g. plumbing)
- By major deliverable (e.g. training)
Definition of Project Management

• Taking knowledge, skills, tools, and techniques, applying those to project activities to satisfy the business need for which the project was undertaken
Benefits of Project Management

• Do more with less
• Flexible framework
• Clear expectations
• Progress is monitored
• Lessons learned
• Do it right the first time
• Less frustration
Project Phases / Project Life Cycle

• Involve a degree of uncertainty
• Divide the project into several phases
  – Improve control
  – Provide links to operation
• Phases are referred to as the “project life cycle”
Characteristics of the Project Life Cycle

- Defines the beginning and end of a project
- Includes the following phases:
  - Initiation
  - Planning
  - Execution
  - Closeout
What’s Your Organization Type?

- Functional?
- Matrix?
- Projectized?
# Project Characteristics by Organization Type

## Project Characteristics by Org Type

<table>
<thead>
<tr>
<th>Function</th>
<th>Weak</th>
<th>Balanced</th>
<th>Strong</th>
<th>Projectized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager's Authority</td>
<td>Little or none</td>
<td>Limited</td>
<td>Low to Moderate</td>
<td>Moderate to High</td>
</tr>
<tr>
<td>Resource Availability</td>
<td>Little or none</td>
<td>Limited</td>
<td>Low to Moderate</td>
<td>Moderate to High</td>
</tr>
<tr>
<td>Who controls the budget?</td>
<td>Functional Manager</td>
<td>Functional Manager</td>
<td>Mixed</td>
<td>Project Manager</td>
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<tr>
<td>Project Manager's Role</td>
<td>Part time</td>
<td>Part time</td>
<td>Full time</td>
<td>Full time</td>
</tr>
<tr>
<td>Project Mgmt Admin Staff</td>
<td>Part time</td>
<td>Part time</td>
<td>Part time</td>
<td>Full time</td>
</tr>
</tbody>
</table>
Challenges in a Matrix Environment

- Lack of PM’s formal authority (biggest challenge)
- Resource management
- Dual reporting relationship
- Potential for duplication of effort
- Unclear roles and responsibilities
- Greater potential for conflict
- Lack of accountability
Types of Authority

• Formal
• Purse-string
• Bureaucratic
• Technical
• Charismatic
Key Players

• Project sponsor
  – Ensures the project meets the business needs
  – Provides funding
  – Approves key deliverables
  – Assists in issues resolution and change management
Project Sponsor Challenges

- Micro managing project sponsor
- The invisible project sponsor
Key Players

- Project manager
  - Assembles the project team
  - Assigns tasks and activities
  - Monitors progress, risk, issues
  - Manages the scope
  - Delivers on time and within budget
  - Ensures project documentation is prepared
Key Players

• Stakeholders
  – Individuals or organizations that are actively involved in the project or whose interests may be positively or negatively affected as a result of the project
  – May exert influence over the project and its results
Key Players

• Project leader
  – Responsible for a subproject
  – Ensures technical aspects are delivered
  – Monitors progress, risk, issues
  – Manages the scope and the change management process
  – Delivers on time and within budget
  – Communicates status to project manager
Key Players

- Project team members
  - Complete assigned tasks on time
  - Work with other team members
  - Monitor progress on their tasks
  - Resolve issues
  - Monitor changes and risks
  - Advise others of potential problems
Key Players

- Other
  - Subject matter experts
  - Business liaisons
Types of Teams

• Working group
• Pseudo team
• Potential team
• Real team
• High-performing team
Is PM a science or an art?

- Science
  - Charts
  - Graphs
  - Calculations
  - Tools
  - Hard skills

- Art
  - Politics
  - Interpersonal
  - Organization
  - Communication
  - Negotiation
  - Conflict resolution
  - Soft skills

Successful project managers are excellent at both
Triple Constraints

Cost

Time

Scope/Quality

Customer Satisfaction
Competing Demands

- Stakeholders with different needs
- Identified and unidentified requirements
- Triple constraints of scope/quality, time, and cost

Differences between or among stakeholders should be resolved in favor of the customer.
Top Two Reasons Projects Fail

• Ineffective **COMMUNICATION**
• Lack of **LEADERSHIP**
Why is Communication Important?

You are the chief airplane washer at the company hangar and you:

• Hook the high pressure hose up to the soap suds machine.
• Turn the machine “on.”
• Receive an important call and have to leave work to go home.
• As you depart for home, you yell to your assistant, “Don, turn it off.”
• Assistant Don thinks he hears, “Don’t turn it off.” He shrugs and leaves the area right after you.
• The result............
Project Manager - Tips for Success

• Remain calm, even under stress
• Motivate and reward the team
• Be proactive
• Organize, plan, and communicate
• Set priorities and deadlines
• Have a sense of humor
Project Manager - Tips for Success

• Show strong leadership skills
• Generate a shared commitment
• Show empathy
• Work smarter, not harder
• Set realistic goals
• Lead by example
COMMUNICATION EXERCISE
PROJECT INITIATION PHASE
Module Objectives

• Identify the objectives of the initiation phase
• Prepare a project proposal
• Determine next steps for entry into the planning phase
Which way should I go?
That depends on which way you are going.
I don’t know where I’m going.
Then it doesn’t matter which way you go.
Gather Data

- Interview the project sponsor
- Identify key project stakeholders
- Conduct additional interviews
- Read documentation
- Learn as much as you can
- Research on the internet
Develop the Project Proposal

• Goal:
  – General statement of intent
  – Purpose toward which the effort is directed
  – Answers the question “why?”
  – Must be linked to an organizational strategic goal
Develop the Project Proposal

• Goal examples:
  – To improve our competitive position within the financial services industry
  – To reduce operating costs and become a more cost-effective service provider
  – To improve customer service and our image as the company that cares
  – To improve the quality of clinical care and reduce mortality rate
  – To provide quality services to our neighborhoods
Develop the Project Proposal

• Objectives:
  – Specific statements of the measurable results to be provided by the project
Develop the Project Proposal

• Objective examples:
  – To convert all data to release 3.6 of Acme Ledger System no later than March 31, 2008, at a cost not to exceed $2.5 million, according to all internal standards, policies, and procedures
  – To renovate the youth shelter no later than May 1, 2008, at a cost not to exceed $500,000, according to all building codes in Jefferson County, using the design suggested by ABC Architectural firm
Develop the Project Proposal

• Scope and major deliverables
  – Sum total of the project
  – What is included in the project
  – Major deliverables
  – Examples
    • Training
    • Construction
    • Equipment
Develop the Project Proposal

• Boundaries
  – Opposite of scope
  – What is not included
  – Helps manage expectations
  – Clarifies the scope
  – Avoid unpleasant surprises
Develop the Project Proposal

- Business considerations and requirements
  - Helps to understand the business environment
  - Special needs
  - Written by the business owner
  - Need to surface early for planning
Develop the Project Proposal

• Technical considerations and requirements
  – Helps to understand the technical environment
  – Special needs
  – Technology perspective
  – Need to surface early
Develop the Project Proposal

• Performance measurement criteria
  – Measures of success
  – Helps define when the project is over
  – Used during closeout phase
  – Ensures quality

Were we successful?
Develop the Project Proposal

• Benefits
  – Positive results expected from the project
  – Purpose for which the project was undertaken
  – May be
    • Tangible
    • Intangible
Develop Project Proposal

• Priorities
  – Time driven?
  – Cost driven?
  – Scope/quality driven?
Develop Project Proposal

• Assumptions
  – Factors that are considered to be true, real, or certain
  – Must occur to be successful
  – Must be documented and understood

Budget is approved
Resources are available
Develop Project Proposal

• Constraints
  – Factors that may limit your options:
    • Pre-defined budget (e.g. not to exceed)
    • Pre-determined project team
    • Time-driven project
Develop Project Proposal

• Risks
  – Unplanned events
  – Can have positive or negative consequences
  – Uncertainty
  – Document at a high level
Develop Project Proposal

• Open issues or pending decisions
  – Items that must be resolved before proceeding
  – May include resource or technical issues
  – Outstanding questions
Develop Project Proposal

• Interdependencies to other projects
  – Predecessor projects
  – Successor projects
  – Co-dependent projects
Develop Project Proposal

• High-level costs
  – Ballpark estimate of project cost
  – Known costs and best guess at other costs

Provide a range of estimates, if possible
Develop Project Proposal

- Major milestones and high-level target dates
  - Ballpark estimate of project length
  - Show major milestones
  - Use ranges
Develop Project Proposal

• Alternative implementation strategies
  – Ask subject matter experts
  – Review other projects
  – Include advantages and disadvantages

Big bang or phased? Make or buy?
Develop Project Proposal

• Recommended approach
  – Select best alternative
  – Explain the reasoning
  – Include any risks
Develop Project Proposal

• Resource needs
  – Specific people
  – Specific skill sets
  – Equipment
  – Training rooms
Gain Sponsor Approval

• Present the proposal
• Explain your approach
• Receive approval
• Ask for needed assistance
• Negotiate due date for next phase
• Agree on progress reporting
• Publish announcement memo
PROJECT PROPOSAL EXERCISE
PROJECT PLANNING PHASE
Module Objectives

• Identify the planning processes
• Describe a detailed work breakdown structure
• Build an activity list
• Estimate the duration of activities
• Document risks
• Finalize project plan development
Guess the Percent

• What percent of your project team’s time should be spent on planning?
  A. 10%
  B. 20%
  C. 30%
  D. Between A and B
  E. Between B and C
Planning Processes

- There are several planning processes
- Planning is an ongoing effort throughout the life of the project
Planning is an Iterative Process

Initiation

Planning Process

Executing Process

Close Out

Monitoring and Controlling Processes
Planning Phase Deliverables

• Integrated project management plan
  – Project definition (approved project proposal)
  – Project structure
  – Subsidiary management plans
Subsidiary Management Plans

• Integration
• Communications
• Risk
• Procurement
• Cost

• Quality
• Human Resources
• Scope
• Time
Creating the Work Breakdown Structure

• Deliverable-oriented, tree-like structure
• Graphically defines all the work in the project

Golden Rule of Project Management

If it’s not in the work breakdown structure, it’s not in the project!
Sample Deliverable Breakdown

Hardware

Select hardware

Purchase hardware

Install hardware
Sample WBS
Roles and Responsibilities

• Start with the WBS
• Identify project roles, responsibilities, and reporting relationships
• Document primary and support responsibilities
Selecting Resources

• Work with functional managers
• Ensure right skill sets are available when needed
• Create your own resource pool
Defining the Work

• Identify your deliverables (work buckets)
  – Usually a single word
  – Must be a NOUN

• Break each deliverable down into tasks
  – These require action
  – Starts with a VERB

• Break each task down as far as necessary
Sequencing the Work

• Document interactivity dependencies
• Ensure a realistic schedule
• Identify constraints
Identifying Dependency Relationships

• Mandatory
  – Inherent in the work itself
  – Physical limitations

• Discretionary
  – Based on best practices
  – Specific sequence desired
Estimating the Time Required

• Estimate the time needed to complete each activity
• Consider each resources’ availability
Creating the Project Schedule

• Tasks and activities
• Start and finish dates
• Resources
• Dependencies
## MS Project Schedule

<table>
<thead>
<tr>
<th>Task</th>
<th>Task Name</th>
<th>Complete</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Predecessors</th>
<th>Resource Names</th>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>The Wedding Project</td>
<td>40%</td>
<td>159 days</td>
<td>12/29/05</td>
<td>08/12/06</td>
<td></td>
<td></td>
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<tr>
<td>2</td>
<td>Matrimony Proposal Received</td>
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<td>0 days</td>
<td>12/29/05</td>
<td>12/29/05</td>
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<tr>
<td>3</td>
<td>Planning</td>
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<td>1 day</td>
<td>12/29/05</td>
<td>12/29/05</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Communication</td>
<td>42%</td>
<td>136 days</td>
<td>02/01/06</td>
<td>08/12/06</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Save-the-Date Cards</td>
<td>100%</td>
<td>57 days</td>
<td>02/02/06</td>
<td>04/23/06</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Research potential vendors</td>
<td>100%</td>
<td>0.8 hrs</td>
<td>02/01/06</td>
<td>02/01/06</td>
<td></td>
<td>Consultant[25%]</td>
</tr>
<tr>
<td>12</td>
<td>Review choices</td>
<td>100%</td>
<td>0.1 hrs</td>
<td>02/01/06</td>
<td>02/01/06</td>
<td></td>
<td>Bride</td>
</tr>
<tr>
<td>13</td>
<td>Select desired design</td>
<td>100%</td>
<td>2.6 hrs</td>
<td>02/03/06</td>
<td>03/07/06</td>
<td>12FF</td>
<td>Bride,O2oom</td>
</tr>
<tr>
<td>14</td>
<td>Customize layout</td>
<td>100%</td>
<td>2.1 hrs</td>
<td>03/08/06</td>
<td>04/19/06</td>
<td></td>
<td>Bride,O2oom,Consultant[25%]</td>
</tr>
<tr>
<td>15</td>
<td>Determine quantity</td>
<td>100%</td>
<td>1.05 hrs</td>
<td>03/20/06</td>
<td>04/13/06</td>
<td></td>
<td>Bride,O2oom</td>
</tr>
<tr>
<td>16</td>
<td>Submit and pay</td>
<td>100%</td>
<td>1 day</td>
<td>04/14/06</td>
<td>04/18/06</td>
<td></td>
<td>Father</td>
</tr>
<tr>
<td>17</td>
<td>Receive cards</td>
<td>100%</td>
<td>1 day</td>
<td>04/21/06</td>
<td>04/22/06</td>
<td>16FS+5 days</td>
<td>Mother</td>
</tr>
<tr>
<td>18</td>
<td>Distribute cards</td>
<td>100%</td>
<td>1 day</td>
<td>04/22/06</td>
<td>04/23/06</td>
<td></td>
<td>Mother</td>
</tr>
<tr>
<td>19</td>
<td>Save-the-Date Cards Mailed</td>
<td>100%</td>
<td>0 days</td>
<td>04/23/06</td>
<td>04/23/06</td>
<td></td>
<td></td>
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<tr>
<td>20</td>
<td>Invitations</td>
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<td>02/01/06</td>
<td>02/01/06</td>
<td></td>
<td></td>
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<td>RSVPs</td>
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<td>02/01/06</td>
<td>02/01/06</td>
<td></td>
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<tr>
<td>22</td>
<td>Engagement Photo</td>
<td>13%</td>
<td>72 days</td>
<td>02/01/06</td>
<td>05/13/06</td>
<td></td>
<td></td>
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<tr>
<td>23</td>
<td>Schedule sitting</td>
<td>100%</td>
<td>2 days</td>
<td>02/01/06</td>
<td>02/01/06</td>
<td></td>
<td>Bride</td>
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<td>24</td>
<td>Attend sitting</td>
<td>0%</td>
<td>2 hrs</td>
<td>03/11/06</td>
<td>03/11/06</td>
<td></td>
<td>Bride,O2oom</td>
</tr>
<tr>
<td>25</td>
<td>Review proofs</td>
<td>0%</td>
<td>1.1 hrs</td>
<td>03/17/06</td>
<td>03/28/06</td>
<td>24FS+5 days</td>
<td>Bride,O2oom</td>
</tr>
<tr>
<td>26</td>
<td>Select pose</td>
<td>0%</td>
<td>1.05 hrs</td>
<td>03/30/06</td>
<td>04/22/06</td>
<td></td>
<td>Bride,O2oom</td>
</tr>
<tr>
<td>27</td>
<td>Order pictures and pay</td>
<td>0%</td>
<td>1 day</td>
<td>04/22/06</td>
<td>04/25/06</td>
<td></td>
<td>Father</td>
</tr>
<tr>
<td>28</td>
<td>Receive pictures</td>
<td>0%</td>
<td>1 day</td>
<td>05/09/06</td>
<td>05/13/06</td>
<td>27FS+10 days</td>
<td>Mother</td>
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<tr>
<td>29</td>
<td>Engagement Photos Received</td>
<td>0%</td>
<td>0 days</td>
<td>05/13/06</td>
<td>06/30/06</td>
<td></td>
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<tr>
<td>30</td>
<td>Engagement Announcement</td>
<td>0%</td>
<td>63 days</td>
<td>05/13/06</td>
<td>08/12/06</td>
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<tr>
<td>31</td>
<td>Decide which newspapers</td>
<td>0%</td>
<td>2.25 days</td>
<td>05/13/06</td>
<td>05/18/06</td>
<td></td>
<td>Bride,O2oom,Mother</td>
</tr>
<tr>
<td>32</td>
<td>Request procedure and cost estimate</td>
<td>0%</td>
<td>1 week</td>
<td>09/10/06</td>
<td>09/10/06</td>
<td></td>
<td>Father</td>
</tr>
<tr>
<td>33</td>
<td>Research possible formats</td>
<td>0%</td>
<td>12 days</td>
<td>09/22/06</td>
<td>09/22/06</td>
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<td>Consultant[25%]</td>
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<tr>
<td>34</td>
<td>Gather personal information</td>
<td>0%</td>
<td>1 week</td>
<td>09/20/06</td>
<td>09/20/06</td>
<td>33FS+2 days</td>
<td>Consultant[25%]</td>
</tr>
<tr>
<td>35</td>
<td>Write copy</td>
<td>0%</td>
<td>2 days</td>
<td>07/04/06</td>
<td>07/04/06</td>
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<tr>
<td>36</td>
<td>Review and approve</td>
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<td>1.25 days</td>
<td>07/05/06</td>
<td>07/06/06</td>
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<td>Bride,O2oom</td>
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<td>37</td>
<td>Write cover letter</td>
<td>0%</td>
<td>1 day</td>
<td>07/06/06</td>
<td>07/06/06</td>
<td></td>
<td>Mother</td>
</tr>
</tbody>
</table>
Estimating the Project Cost

• Base estimate:
  – Start with the WBS
  – Select an estimating method
  – Estimate expected cost of project by cost category
  – Estimate contingency (management) reserve for:
    • Cost mitigation
    • Scope changes
    • Unexpected risk events
# Project Cost Management

<table>
<thead>
<tr>
<th>#</th>
<th>Category</th>
<th>Original Budget</th>
<th>Revised Budget</th>
<th>Actual Cost</th>
<th>Total</th>
<th>Comments</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Software</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Hardware</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Consulting services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Interfaces</td>
<td></td>
<td></td>
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<tr>
<td>5</td>
<td>Furniture</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Contingency</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Totals</strong></td>
<td><strong>$</strong></td>
<td><strong>$</strong></td>
<td><strong>$</strong></td>
<td><strong>$</strong></td>
<td></td>
</tr>
</tbody>
</table>
Project Communication Plan

- Identify key project stakeholders
- Determine the information needs
  - Upwards communication
  - Lateral communication
  - Downward communication
- Document what, when, why and how information will be distributed
- Develop documentation standards
WBS EXERCISE
## Sample Communication Plan

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Information</th>
<th>Frequency</th>
<th>Method</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steering Committee</td>
<td>Milestone Report</td>
<td>Monthly</td>
<td>Email</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Project Sponsor</td>
<td>Progress Report</td>
<td>Weekly</td>
<td>Email</td>
<td>Project Manager</td>
</tr>
<tr>
<td>Project Team</td>
<td>Progress Report</td>
<td>Weekly</td>
<td>Email/Post to Portal site</td>
<td>Project Manager</td>
</tr>
<tr>
<td></td>
<td>Meeting Minutes</td>
<td>Weekly</td>
<td>Email/Post to Portal site</td>
<td>Project Manager</td>
</tr>
<tr>
<td></td>
<td>Action Items</td>
<td>Weekly</td>
<td>Face to Face in Team Meeting</td>
<td>Project Manager</td>
</tr>
<tr>
<td>All Management Staff</td>
<td>Training Needs</td>
<td>March, 2008</td>
<td>Staff Meeting</td>
<td>Sponsor</td>
</tr>
<tr>
<td></td>
<td>Changes project will bring</td>
<td>February, 2008</td>
<td>Email and Letter</td>
<td>Sponsor</td>
</tr>
</tbody>
</table>
Scope Management Plan

- Spells out the process involved for making changes to the scope
- Defines who has the authority to approve changes
Change Control Process

• Can be different from project to project
• Simple projects – simple solution
  – PM and/or Sponsor signs off on any changes
• Complex projects –
  – May have different levels of change
  – May have a Change Control Board in place to approve more detailed or complex changes
Integration Management Plan

• Document spelling out how each of the individual plans will work together
Project Management Plan

• Combination of subsidiary mgmt plans
• Assemble all planning deliverables
• Publish final plan to key project personnel and management
• Track and compare actual implementation to original baseline
PROJECT EXECUTION PHASE
Module Objectives

• Identify what needs to be monitored during the execution phase
• Describe the steps necessary for maintaining control of the project during execution
• Illustrate how variances should be managed
• Differentiate between various performance reports
Murphy’s Law

• When things are going well, something will go wrong
• When things just can’t get any worse, they will
• When things appear to be going better, you have obviously overlooked something
Ongoing Questions during Execution

• Are we on schedule?
• Are we on budget?
• Has the business need changed?
• What new issues do we have to address?
• Are any risk events materializing?
• Where are we in danger of not meeting our goal?
Ongoing Questions during Execution

• Are we delivering a quality product?
• Are our vendors delivering as promised?
• Do we have enough resources?
• Are unauthorized changes being allowed?
• Is the team working together productively?
Monitoring the Schedule

- Update the project schedule on a weekly basis
- Compare actual to plan
- Report and address variances quickly
- Hold the team accountable for delivering on time
- Replan as necessary
Monitoring the Budget

• Review financial information no less than monthly
• Compare actual to plan
• Report and address variances quickly
• Hold the team accountable for cost containment
• Re-project expenses as necessary
Monitoring Scope

• Compare work results to the plan daily
• Ensure results meet the need
• Ensure formal acceptance is received
• Reflect approved changes in the project plan
Change Management

• Any modification to the benefits, scope, time or cost
• Need an organized process for change
• Follow the process for change as outlined in the change management plan
• Source of changes:
  – Sponsor
  – Regulatory
  – External
  – Internal
• Keep a record!
## Change Control Log

<table>
<thead>
<tr>
<th>ID</th>
<th>Short Description of Change</th>
<th>Date Requested</th>
<th>Date Needed</th>
<th>Date Change Made</th>
<th>Approved By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Add videography to scope of the wedding</td>
<td>3/15/06</td>
<td>10/14/06</td>
<td>07/15/06</td>
<td>Father of the bride</td>
</tr>
<tr>
<td>2</td>
<td>Wedding dress cost exceeded budgeted amount – need to increase cost of the project</td>
<td>4/1/06</td>
<td>4/5/06</td>
<td>4/5/06</td>
<td>Father of the bride</td>
</tr>
</tbody>
</table>
Scope Creep

• Changes through the “back door”
• Usually thought to be minor
• Enforce the change management process
Monitoring Issues

- Use an “action items list” to document issues
- Ensure ownership is clear
- Assign an due date
- Review progress at the weekly status meeting
# Sample Action Items List

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
<th>Originator</th>
<th>Responsibility</th>
<th>Due Date</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine who will host the out of town wedding shower</td>
<td>Mother of Bride</td>
<td>Mother of Groom</td>
<td>8/1/06</td>
<td>Closed</td>
<td>Aunt of Groom will host</td>
</tr>
<tr>
<td>2</td>
<td>Call bakery to change cake to all chocolate</td>
<td>Bride</td>
<td>Mother of Bride</td>
<td>8/31/06</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Call shoe salon and order shoes ½ size larger</td>
<td>Bride</td>
<td>Mother of Bride</td>
<td>8/31/06</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>
Monitoring Risk

• Review the risk management plan regularly
• Monitor triggers and the watch list
• Implement mitigation plans
• Invoke contingency plans as necessary
• Repeat the “identify, assess, respond” cycle as changes occur
Risk Management Plan

• Identify the potential RISK EVENT
• Rate the risk for:
  – Degree of impact
  – Probability of occurrence
• Will you place the risk on the watch list?
• Assign a risk owner to watch for the triggers
Risk Assessment Chart

Degree of Impact

HIGH

MED

LOW

Probability of Occurrence

LOW

MED

HIGH
Risk Assessment

- **Red** area – always “yes” which means develop a risk management plan.
- **Yellow** area – iffy, answer on a case-by-case basis.
- **Green** area – always “no”, don’t develop a risk management plan. Just hope it doesn’t happen and if it does deal with it then.
Monitoring Quality

- Review work products to ensure quality standards are met
- Use an independent reviewer
- Implement process improvements as necessary to eliminate unsatisfactory performance
Monitoring the Vendor

• Review the vendor’s performance regularly
• Ensure performance meets the requirements as documented in the contract
• Insist on formal progress reports
Monitoring Human Resources

- Will the resources be available as originally planned?
- Are resources being utilized effectively?
- Are resources working together?
Team Building

• Develop a personal rapport
• Be supportive of the team
• Be clear on expectations
• Take a personal interest
• Celebrate special occasions
• Be accessible
Performance Reporting

• Provide project information to key stakeholders in a timely manner and method
• Execute the communications management plan
• Report progress and trends on all aspects of the project
Progress Reports

• Project progress
• Accomplishments this reporting period
• Plans for the next reporting period
• Comments (yellow flags)
• Issues or concerns (red flags)
Performance Reporting Guidelines

- Steering committee, or senior management
  - Summary level information (monthly)
- Project sponsor
  - As agreed upon (varies)
- Project manager
  - Mid-level information (weekly)
- Team members
  - Detailed information (weekly)
RISK MANAGEMENT EXERCISE
PROJECT CLOSEOUT PHASE
Module Objectives

• Outline key tasks in the closeout phase
• Recognize the importance of formally closing out the project
• Address special challenges in project closeout
• Conduct a project review meeting and document final results
Entry into the Closeout Phase

- Project was completed successfully
- Project was put on hold
- Project was terminated or canceled
Closeout Activities

• Recognition
• Closure
• Performance improvements
• Final approvals
• Contract closure
Closeout Activities

• Transfer responsibilities
• Release resources
• Documentation
• Close out project accounting (time and budget)
Special Challenges

• Uncertainty
• Post-project depression
Project Review Document

- Introduction
- Performance Criteria
- Lessons learned
- Open issues or action items
- Acknowledgements
- Chronology of major events
- Appendix
Why Projects Don’t Live up to Expectations

- Failure to reach agreement on requirements
- Political battles, unresolved conflicts
- Skill set mismatch
- Plan was not doable
Why Projects Don’t Live up to Expectations

- Plan was not followed
- Ineffective communication
- Lack of leadership
- Lack of project management skills
Celebrate!!

• Show appreciation!
• Recognize key individuals!
• Reinforce positive behavior!
Let’s Review!
Basics

- Definition of a project
- Organizational and sponsor challenges
- Hard versus soft skills
- Triple constraints
- Communicate, communicate, communicate!
Initiation

Input:
- Gathering data

Output:
- Project proposal
Planning

**Input:**
- Work breakdown structure
- Roles and responsibilities
- Activities

**Output:**
- Project management plan
Execution

Input:
• Integrated project management plan

Output:
• Progress reports
Close Out

**Input:**
- Lessons learned

**Output:**
- Final documentation
- Party!
Questions?
THANK YOU