The Basics of Project Management

People~Connect Institute

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Objectives:

- To take strategy to action
- Definition of Project Management
- PM Core Components
- Five Major Stakeholders
- Gantt Chart
- Risk Matrix
- Post Mortem and Lessons Learned

Big Three

- P _____
- P _____
- P _____

Projects

Revenue Enhancement
Cost Reduction
Business Value
Charter
Gantt Chart
Risk Matrix
Post Mortem
Charter
Gnatt Chart
Risk Matrix
Post Mortem
Charter
Gnatt Chart
Risk Matrix
Post Mortem

PM Sequence

Business Case (Justification)

Work Breakdown Structure (WBS, if needed)

Charter = The plan

Gantt Chart = The schedule
(the commitment to the plan)

What Are Your Current Key Library Initiatives that need to be done in the next ___ days?

How many? ____

Exercise: Where Should We Spend More Time? Left/Right?

Definition of a project

"A project is a ***temporary*** endeavor undertaken to create a ***unique*** product or service."

- Project Management Institute, 2018

"***organized*** effort …. ***unique*** product, service, process or plan."

- Project Management Memory Jogger

Count the black dots! :o)

Distinguishing features

Ordinary work

- **Ongoing**
- **Same processes repeated**
- **Same output each time**
- **Predefined work assignments**

Project work

- **Temporary**
- **Has beginning and end**
- **Unique output**
- **Varying work assignments**

Exercise - Is it a project?

Is it a Project?

	Ordinary Work	Project Work
1.Hiring a sales team for a new office	_____	_____
2. Fulfilling customer orders	_____	_____
3. Writing and publishing a book	_____	_____
4. Teaching *Sales 101* winter quarter	_____	_____
5. Conducting a performance review	_____	_____
6. Producing the company's annual report	_____	_____
7. Writing a letter to a prospect	_____	_____
8. Ordering office supplies	_____	_____
9. Designing a project management class	_____	_____
10. Making a quilted comforter	_____	_____

Everything

Can be Broken Down to a Process

Key terms

- Stakeholders
- Roles/Sponsor
- Scope
- Deliverables
- Resources
- Risks
- Subprojects

Stakeholders

- Affected by the project
- Make a significant contribution to the project

Sponsor

- Ensures
  - consistency with strategic goals
  - project meets customers’ needs
  - clear project direction
- Helps team overcome obstacles
- Creates project charter

SADD

Sponsor

Attention

Deficit

Disorder

Top Sponsor Issues

Where We Need Them to Have a Behavioral Shift

1. Unapproachable
2. Lack of access
3. Doesn't’t get it
4. Not listening
5. Not acting on advice
6. Not playing the role

Exhaustion

Energy applied with no results

Biggest Problems

1. Project was too tightly scheduled
2. Project poorly defined
3. Project Communication was unreliable and undefined
4. Customer reduced the time allocated but did not reduce scope
5. Roles of project team/stakeholders not clear or consistently defined
6. Wrong people selected
7. No attempt to analyze the lessons learned
8. No attempt to capture the best practices experienced during the project so others could benefit.

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Charter

Mini Business Plan (*not a schedule*)

A charter is a way of making sure that all the people involved are committing to the same goal.

See Handout.

Final deliverable

- A product, service, process or plan
- Must satisfy customer's needs and requirements
- Delivered to customer(s)

Final deliverable: _____

Organizational Deliverables

Product, service, process or plan

- Created for the organization, not the customer
- ***By-products of the project***

Project Manager

- Ensures
  - Customer, organizational satisfaction
  - Project done on time, within constraints
- Creates, carries out project plan
- Facilitates team
- Monitors progress

Team member

- Ensures
  - His/her part of project work done on time, within constraints
- Communicates
  - Issues to team
  - With supervisor
- Monitors progress of subprojects

Customer

- Sets requirements
- Provides funding
- Reviews project milestones
- Accepts final deliverable

Key suppliers

- Provide timely inputs
- Assure quality of inputs
- “Partners”

Functional managers

- Support project objectives
- Provide resources from his/her area
    - Staff
    - Equipment
    - Services

Pick Three Exercise

1. _____

2. _____

3._____

A self "for filling" prophecy.

Success Factors

Results / Quality

Time ***Resources***

(Budget is main one)

Customer Satisfaction?

Thou shalt

Gain consensus on project outcomes

Build the best team you can

Develop a comprehensive, viable plan and keep it up to date

Determine how much stuff you really need to get things done

Have a realistic schedule

NOT try to do more than can be done

Remember that people count

Gain the formal and ongoing support of management and stakeholders

Be willing to change

Keep people informed of what you're up to

Be willing to try new things

Become a leader as well as a manager

SCOPE

In Scope	Out of Scope
MUSTS	**WANTS**

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Affinity Diagram
Defining Interim Variables –

The Q's are quantifiable,
Quality, Time, $

Gantt Chart

- Advantage
  - Easy to comprehended
  - Requires thinking through project components in order to be created
  - Helps demonstrate interrelatedness of various activities

Milestone Schedule

Milestones	θ		Chart er given		Plan ap- roved		ID A2 ID A3	ID C2		ID C3	ID B3		ID C6		Final deliv- erable		Close out repor t
			⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖	⊖
			1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31	4/7	4/14

Gantt Chart

11.03
12.03
1.04
2.04
3.04
4.04
5.04
6.04
Preparation and Planning
Develop project proposal
Approve project proposal
Recruit project team
Development and Test
Specify detail requirements
Develop prototype
Approve prototype
Develop beta version
Test beta version
Apply final corrections
Approve final version
Implementation
Train users
Roll-out final version

Bottom line with Risk

- There are two ways of dealing with risk. One, *risk management, is proactive and carefully analyzes future project events and past projects to identify potential risks. Once risks are identified, they are dealt with by taking measures to reduce their probability or to reduce their impact.*
- *The alternative to risk management is crisis management. It is a reactive and resource-intensive process, with available options constrained or restrict*

What Could Go Wrong? Use Post-It Note
Rate the Probability and Seriousness

	Probability
Low	**1-40%**
Medium	**41-70%**
High	**71-99%**

	Seriousness
Low	**Minor effect, sponsor / customer would notice**
Medium	**Miss deadlines, budget or customer acceptance criteria**
High	**Jeopardize or kill project**

Risk Matrix

High
Medium
Low
Low
Risks
Medium
High
Risks
Risks
Low
Medium
High
Threat Levels

Two Types of Risks

Business Risk

Project Risk

The Amount of Risk Allowed!

Assign a *"Control"* level to the business risk and the project risk

High risk levels cost time and money!

Tips for Developing Project Budget

- Staff time
- Other internal costs
- External costs
- Accuracy
- High-end check

Resources – *Constraints*

- Organizational restrictions on the project

"No new hiring"
"No unscheduled machine downtime"
"Using only existing printers"

Essential?

Absolutely???

Variances

Actual
Positive ("good") variance
Planned
Actual
Negative ("bad") variance

Managing variances

Final status report

Scope summary

- Final deliverable(s)
- Acceptance criteria
- Results

Schedule summary

- Key milestones
- Planned dates
- Actual completion

Staff, budget summary

- Planned
- Actual

Changes to plan

- Original
- Change
- Final actual

Explain variances

As project mgt.
post mortems/ "lessons learned”
become centralized, reviewed, and
used for future projects
the

Library ***organizational IQ increases***.

Lessons learned meeting

Do a better job next time

Capture successes

Learn from mistakes

Six Keys to Success

- Use an effective method
- Invest in planning
- Involve the customer
- Make it manageable
- Develop the team
- Communicate effectively
- Learn from your mistakes

Thanks

- Make planning a habit!
- Duration and donation