PM in Practice | 5 Keys to Managing Any Project

PROJECT MANAGEMENT WEBINAR

Things to know...

- All participants will be on mute

- Questions are welcome

- Use the question box to ask questions

- PM training is valid for 1 PDU

- Must be in attendance for full session

- PDU certificate sent by the end of the day

- Recording and slides sent by tomorrow

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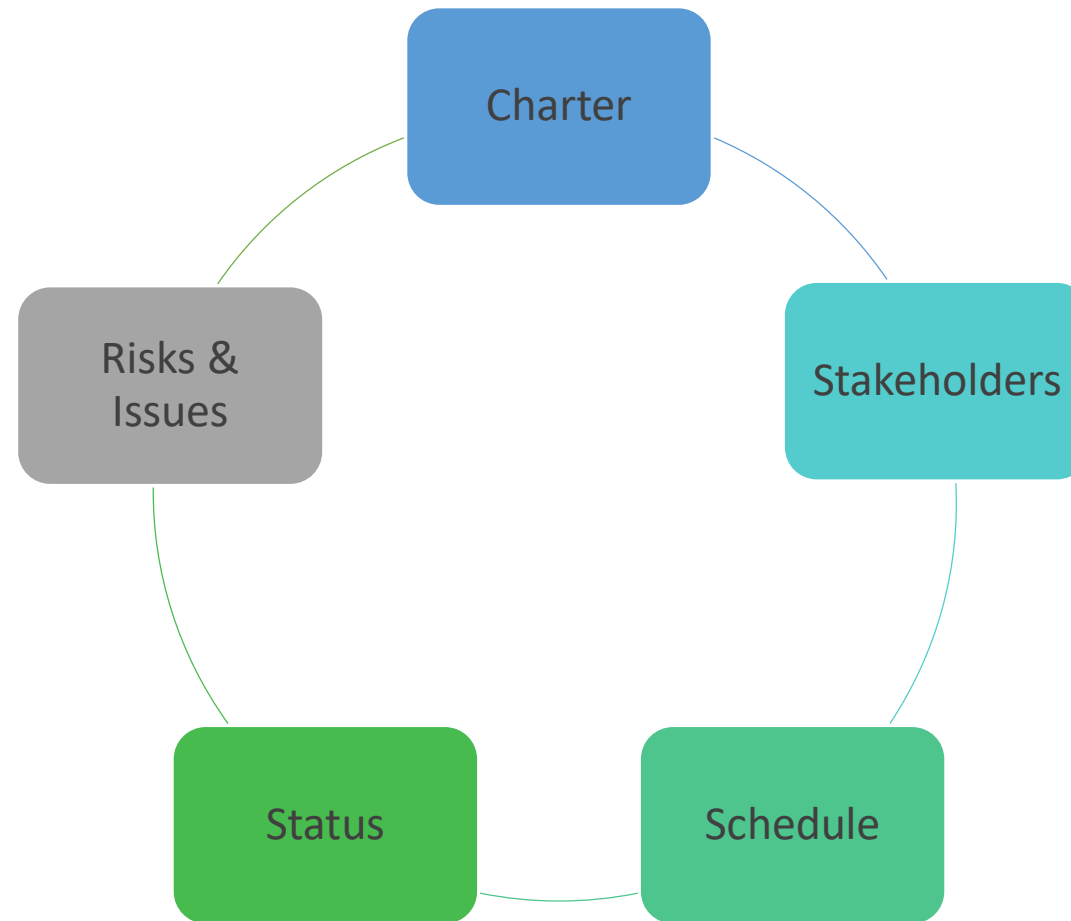
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Why 5 Keys?

- Life and work events are projects!

- 5 key tools to help you be more effective

5 Keys to Managing Any Project

Your Challenges

The Charter

- Do you regularly create a charter?

  - If not, why?

- Do you regularly review your charter?

  - If not, why?

Your Questions - Charter

- May create charter / not as many review regularly

- I create charters for projects over $100k

- What would be other names for charters?

- The project charter expands to a business analysis document

The Charter

Project Description
- Briefly describe the project

What

Business Justification
- Identify the business need

Why

Major Project Components
- List major subprojects or segments of the project

What

The Charter Continued…

Project Objectives & Deliverables	• Describe quantifiable criteria — *Proof*
Constraints / Assumptions	• Identify limiting factors & assumptions — *Limits*
Known Risks	• Identify any known risks ("gotchas") — *Gotchas*

Your Challenges

Stakeholders

- Do you regularly create a charter?

    - If not, why?

- Do you regularly review your charter?

    - If not, why?

Difficult Stakeholders

- Other IT managers that use a different methodology for managing their projects

- Those whom our product was "imposed" by their top management

- A line manager who didn't want to be involved to the extent he should have

- Customers opposed to a project

- Those that constantly change their vision

- Those that are afraid to make decisions

- Customer with unrealistic expectations

- Working with some stakeholders is their availability or lack of availability, hard to track them down and get them to attend requirement meetings

Stakeholder Register Example

Stakeholder	Group Represented	Project Role	Full or Part Time on Project	Location
Mark Smith	CEO	Executive	NA	HQ
Tom Wang	VP Business Development & Sales	Project Sponsor	PT	HQ
Mary Johnson	Marketing VP	Core team	PT	HQ
TJ Philips	Children's Charity PR Mgr	Core team	PT	LA
Henry Optimo	Sales Manager	Project Manager	PT	LA
Other project team members	TBD			
The community	TBD			

Your Challenges

The Schedule

- Do you regularly create a schedule?

  - If not, why?

- How often do you review and update your schedule?

- Do you review the detailed schedule with your clients?

Schedule Questions/Comments

- I use a project plan

- I don't share details with client – only milestones

- One thing I ask during facilitation is "if I do these exact things in exactly this order, will I produce "x" final result? This often helps to shake out "hidden deliverables"

- Regularly reviewing a couple times per week

- Schedules are usually not very accurate

- I struggle with getting team members to review the schedule

- Should you create a detailed schedule past the first sprint if you're planning an agile project?
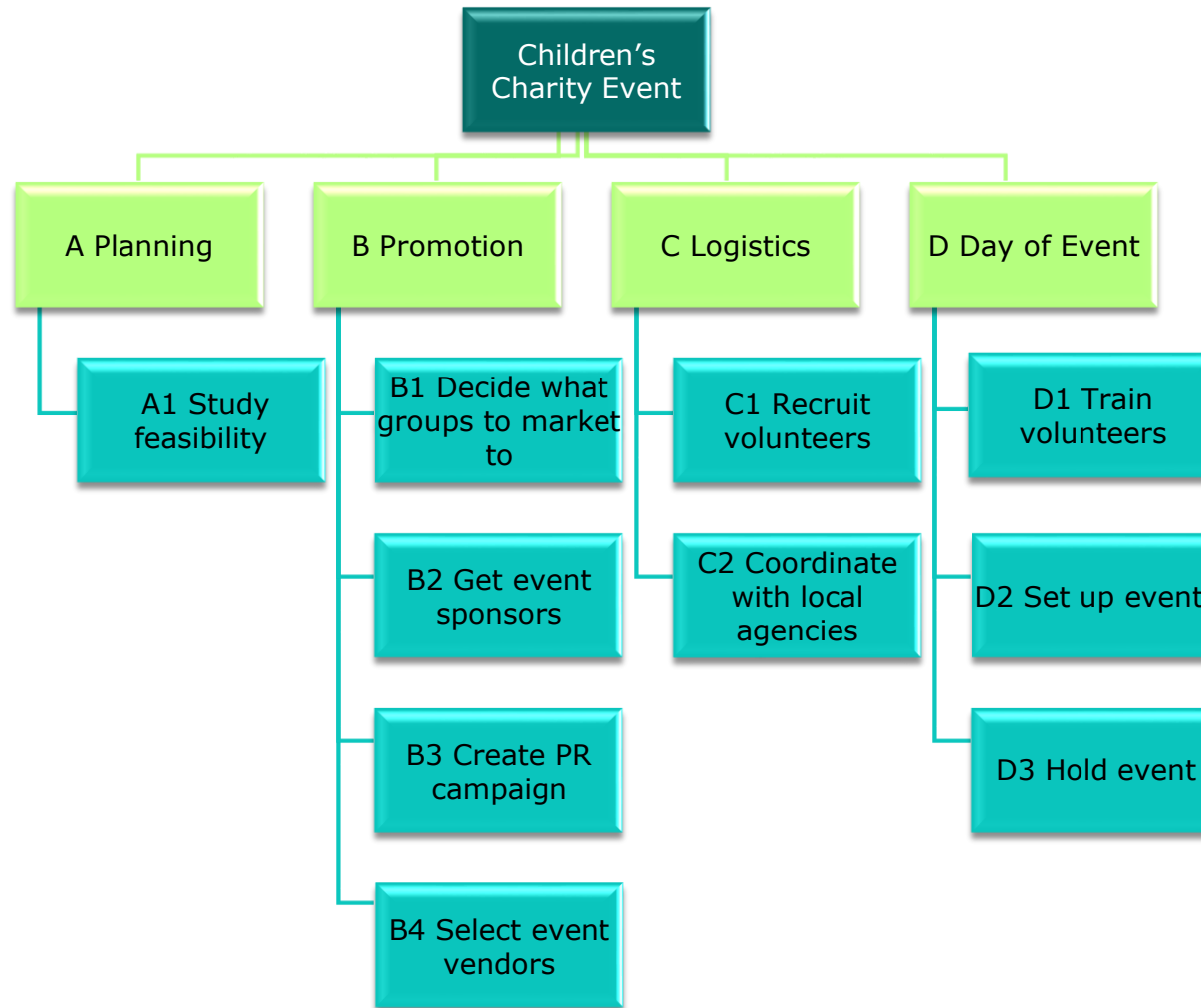
The Schedule

- **Start with Project Charter**

- **Begin to divide into smaller steps or activities that need to be done:**
  - Consult with team and experts as needed
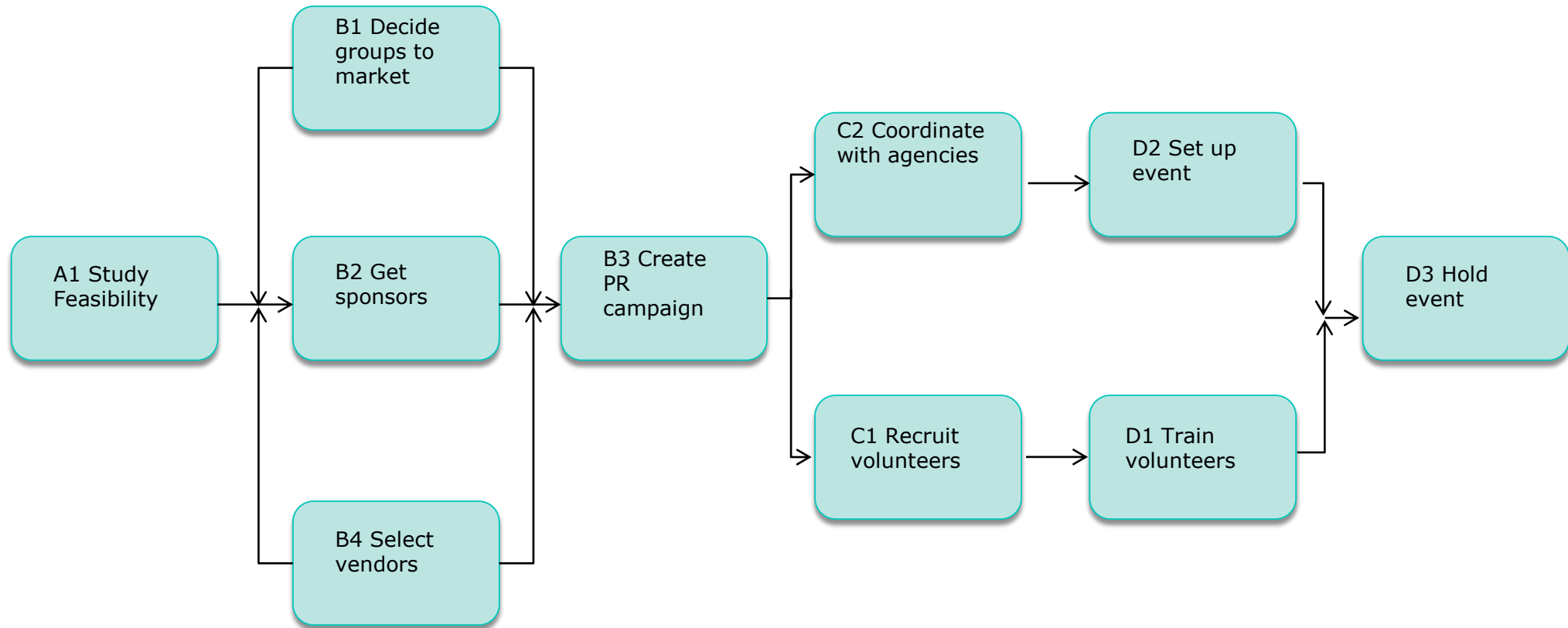 - Use brainstorming
  - Use "sticky notes" technique

  Breaking down a task into smaller steps is also called "decomposing" the work.

Work Breakdown Structure

Schedule Dependencies

Network Diagram showing schedule dependencies

Gantt Chart

Gantt chart example

Task	August 8/1 - 1/15	August 6/16-8/30	September 9/1/9/15	September 9/16-9/30	October 10/1-10/15	October 10/16-10/30	November 11/1-11/15	November 11/16-11/16
Study feasibility	■							
Decide groups to market to		■						
Get sponsors		■	■					
Select vendors		■						
Create PR campaign				■				
Coordinate with local agencies					■	■	■	
Recruit volunteers					■	■		
Set up event								■
Train volunteers								■
Hold event								■

Your Challenges

Status Reports

- Do you regularly hold status meetings?

  - What frequency do you find works best?

- Do you regularly produce Status Reports?

- What are your challenges with maintaining status on your projects?

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Your Questions – Meetings & Status

- Meeting hijackers!

- Do you suggest cancelling status meetings if there is no news or all is on track?

Status Meetings Best Practices

- Establish regular meeting time and day.

- Encourage interactions and disagreement.

- Focus on current and near term tasks.

- Record issues to be resolved with owner

  and due date.

- Resolve issues at the time.

- Discuss ways to fix problems.

- Escalate issues promptly, if needed.

- Track changes in scope.

- Identify new risks.

- Thank everyone.

Your Challenges

Your Risks

- Do you regularly think about the risks on your projects?

- Do you produce a formal risk register?

- How often do you review and/update the risk register?

Your Questions – Risks

- Do you have any suggestions for risk checklists to help with brainstorming?

- Should we connect issue to the impact of the project, or not?

Sample Risk Identification

Examples

| Risk	Effect on Project
If the location is not chosen within the first month of the project, the team will be unable to ensure that marketing materials are delivered in enough time to get enough participants.	Funding objectives may not be met if not enough participants sign up.
If the vendors aren't selected one month before the event, the t-shirts won't be able to be ordered in time for the event.	Participants and sponsors may be unhappy and it will reflect negatively on the reputation of the company and event.

What Risks Do We Focus On?

Examples

Probability	Impact	Risk Event
L	H	1. Event location not selected within the first month of project.
H	H	2. Vendors not selected one months prior to the event

Course Wrap Up
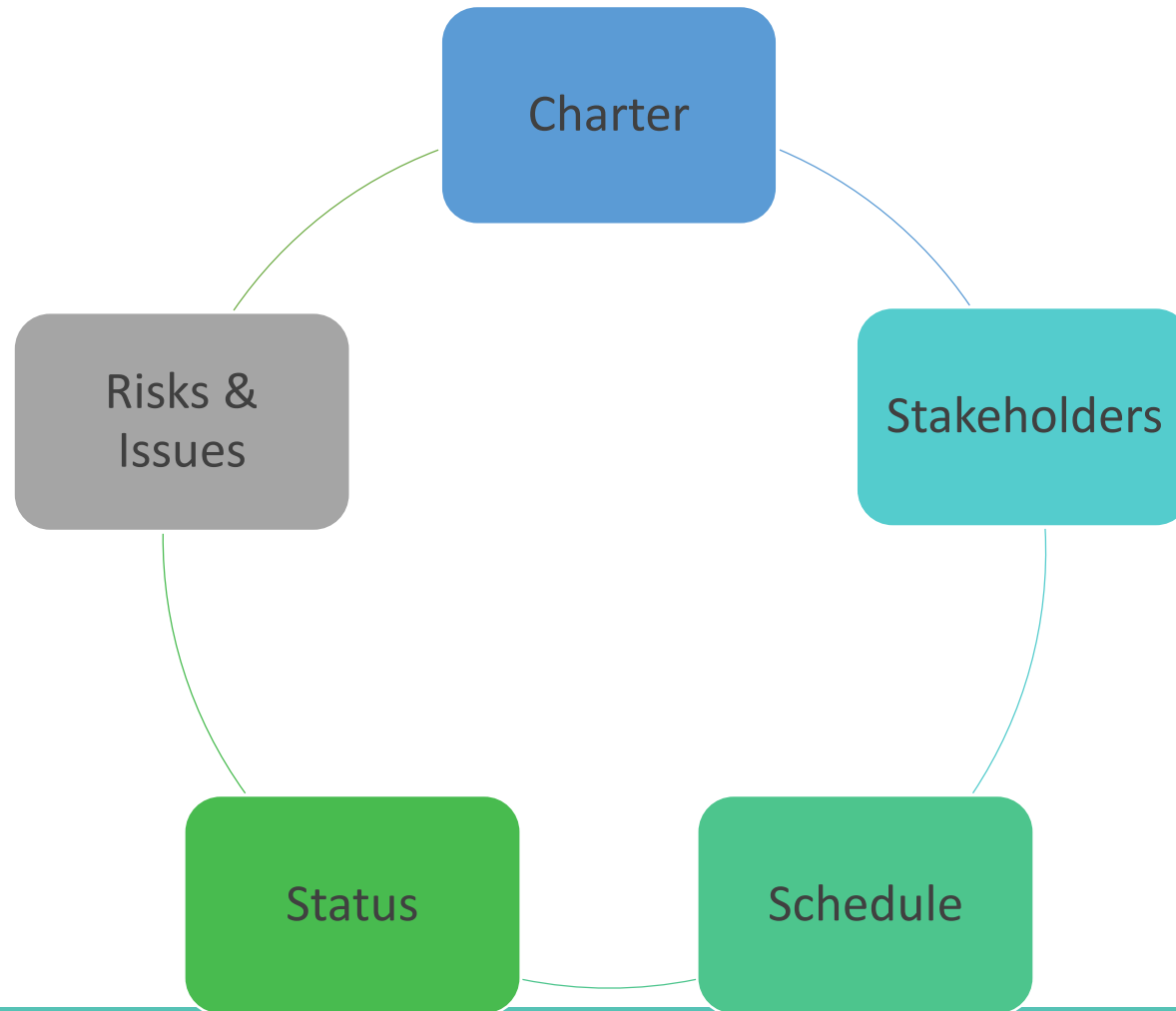
Review

- Charter

- Stakeholders

- Schedule

- Status

- Risks & Issues

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Any questions?

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See you next time!