



PM in Theory | 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

Moderator

Denise Rodriguez

Project Insight

Marketing

Denise.Rodriguez@projectinsight.com

www.projectinsight.net



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Presenter

Diane White

Instructor and Curriculum Development

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PMP® and CAPM® certification, leadership,

business analysis, agile and six sigma

Past PMI Chapter President & Global PMI Board

dwhite@cpconcepts.net

www.coreperformanceconcepts.com

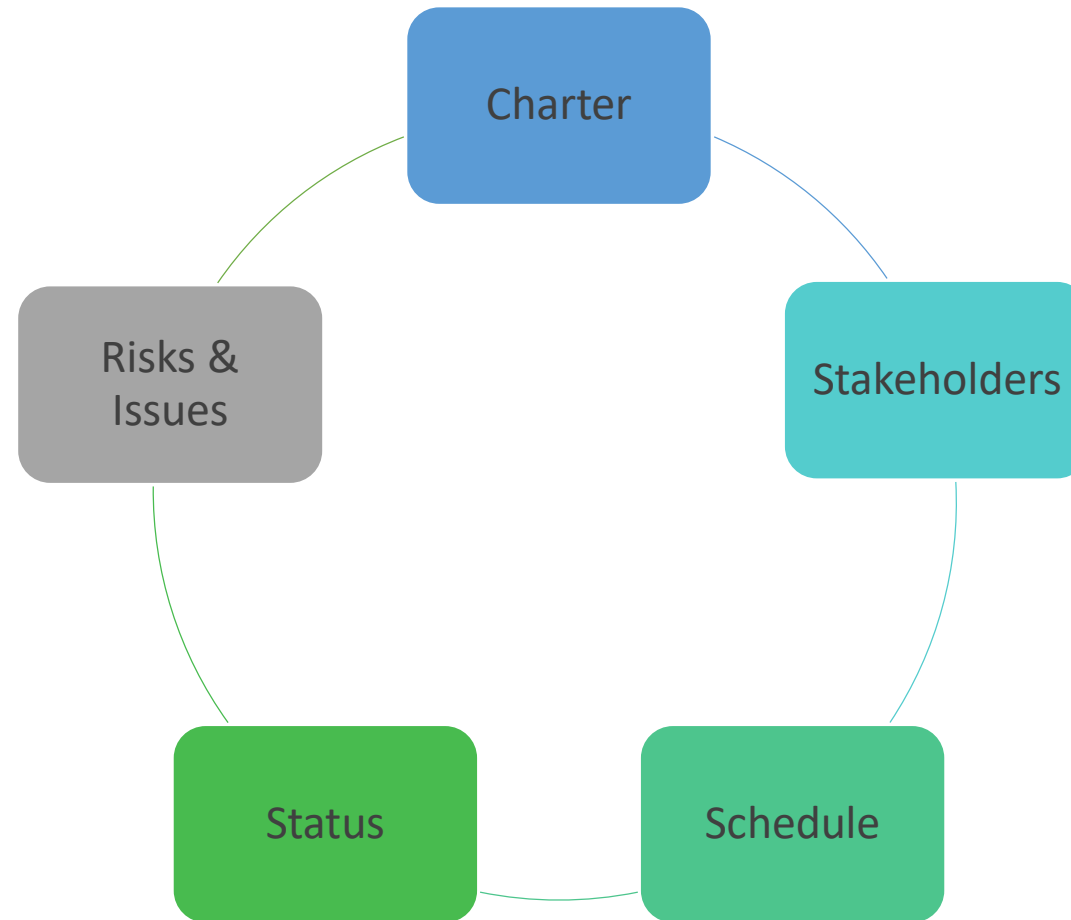
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Why 5 Keys?

- Life and work events are projects!
- 5 key tools to help you be more effective

5 Keys to Managing Any Project



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





The Charter

- Identifies what needs to be done
 - Begins to tell your project's "story"
- Identifies why it needs to be done
- Documents what success will look like
- Gives authority to begin the project



Your Challenges

The Charter

- Do you regularly create a charter?
 - If not, why?
- Do you regularly review your charter?
 - If not, why?

Stakeholders: Ask Questions

1. Who wants the project?
2. Who will benefit?
3. Who are the experts?
4. Who may be affected by the project?
5. Who are the customers or users?
6. Who outside the organization may be affected?

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

Stakeholders

- Do you regularly create a Stakeholder Register?
 - If not, why?
- What is the most difficult stakeholder you've encountered?
 - Would it have been better if you planned for it?

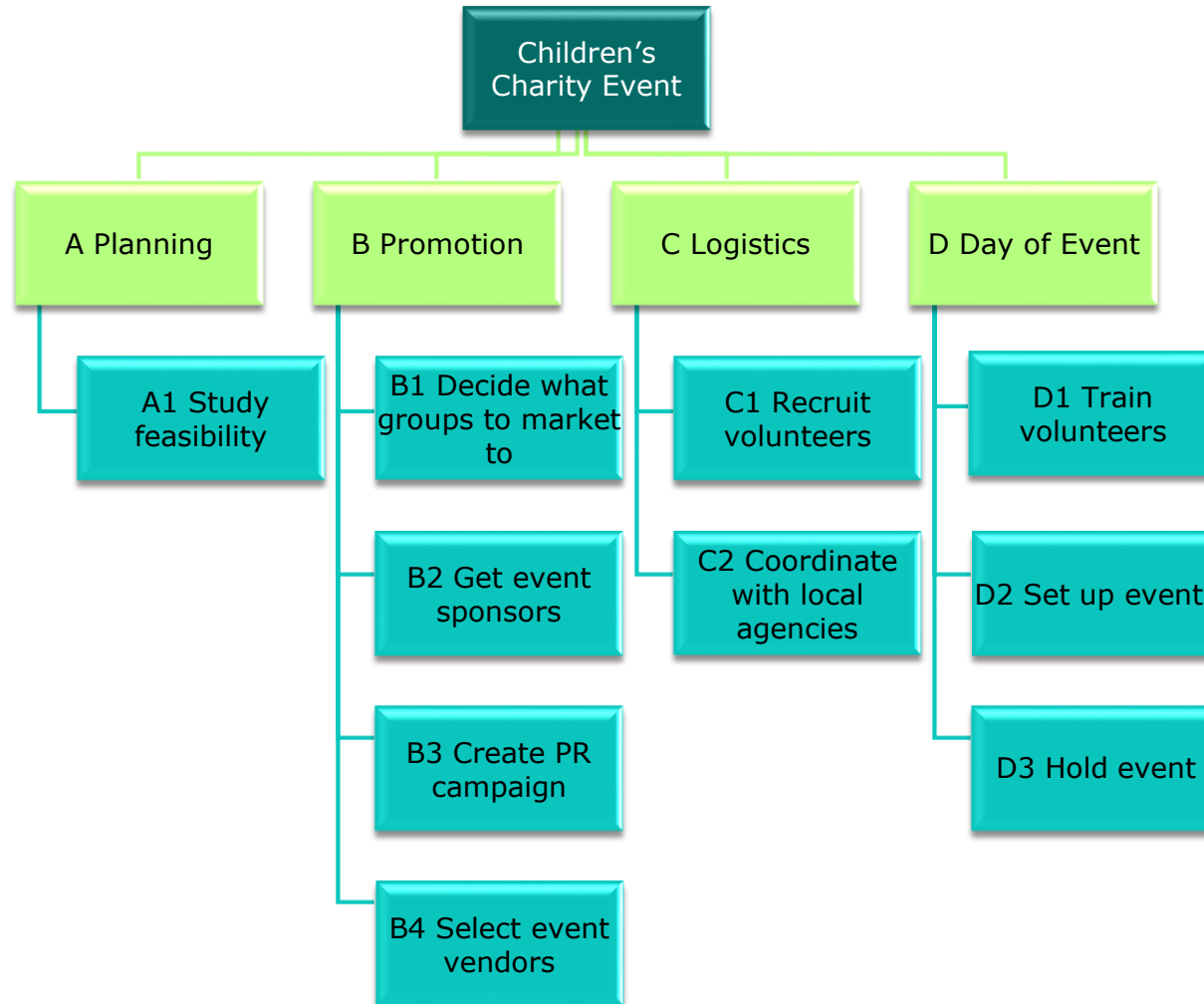


The Schedule

- 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



Sequence of Activities

- Why is the sequence that activities are done important?
- Can all activities be done at the same time? Examples:
 - Resources, physical limitations, supplies and materials availability
- Ensures that everything is done in the proper order
- Sequence that activities can be done defines your schedule

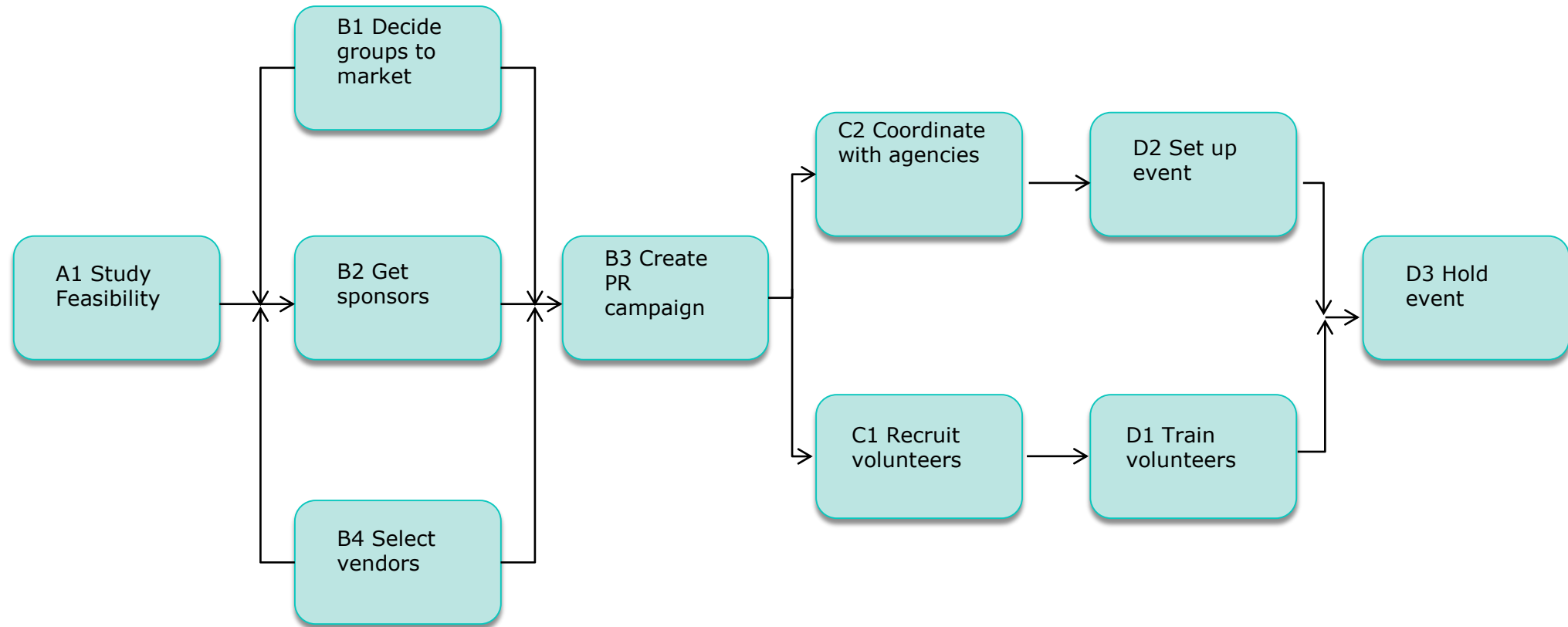


Sequence Considerations

- What must happen BEFORE?
 - (Predecessor)
- What will happen AFTER?
 - (Successor)
- What can happen DURING?
 - (Parallel)

Schedule Dependencies

Network Diagram showing schedule dependencies



Gantt Chart

Gantt chart example

	August	August	September	September	October	October	November	November
Task	8/1 - 1/15	6/16-8/30	9/1/9/15	9/16-9/30	10/1-10/15	10/16-10-30	11/1-11/15	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

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?

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.



Status Reports

Do's & Don'ts

Don'ts for Bad Status Reports	Do's for Good Status Reports
Describe all project issues without prioritizing them	Highlight key areas requiring attention or action
Are too wordy	Clearly articulate actions to be taken and by whom
Have a lack of focus	Suggest actions to resolve and next steps
Don't connect the issue to the impact on the project	Outline issues that affect project outcomes with person responsible
Fail to show when an objective is not being met	List the potentially harmful risks
Don't focus on delivery of objectives	Detail recent accomplishments



Sample Status Report

Status Report					
Project: Charity Fund Raiser				Date: 10/25	
Deliverables	Owner	Revised Completion Date	Reasons for Variance	Corrective Action Plan	Comments
Past due	Identify potential sponsors	11/3	Volunteer identified too many	Prioritize based on past sponsorships	Ask Charity for additional resources
Due this week	Finalize marketing plan				In final review
	Analyze site options				3 sites identified to analyze
Due next week	Create webpage				Darla has vacation, looking for back up
	Select vendors				Meeting next Tues.



Sample Milestone Status Report

Milestone Status Report					
Project: Charity Fund Raiser				Date: 10/25	
Deliverables	Owner	Expected Completion Dates		Status	Comments
		Baseline	Current		
List of volunteers	Sam	9/18	9/18	Complete	
Marketing research report	Mary	10/25	10/25	On schedule	Sign off will be today
Sponsorship plan	TJ	10/18	11/3	On schedule	May be able to improve if we get more resources
Event webpage	Darla	11/4	11/4	On schedule	
List of potential vendors	Michelle	11/4	11/4	On schedule	





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?



Risks

- Hold team brainstorming meeting using:
 - Charter
 - WBS
 - Project Schedule
 - Success criteria
- Ask other knowledgeable subject matter experts.
- Look at similar projects.

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





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?



Review

- Charter
- Stakeholders
- Schedule
- Status
- Risks & Issues

Any questions?

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A top-down view of a workspace. In the upper right, a portion of a silver laptop is visible, showing the keyboard with keys for A, S, D, F, C, V, B, N, M, and navigation keys. Below the laptop is an open notebook with a grid pattern. A silver pen lies on the notebook's pages. To the right of the notebook, a white coffee cup is partially visible. The background is a light-colored wooden desk.

PM in Practice

5 Keys to Managing Any Project

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