

Project Management 101 - Maximizing Results

PwC for FIRST WASHINGTON
May 2020



Agenda for Today

Financial Literacy 101: Maximizing Results

Time	Activity
5 min	1 - Introductions - PwC (Lindsey, Shelly)
10 min	2 - Foundations of Project Management
15 min	3 - Managing Execution
10 min	4 - Workflow and Automation Ideas - Leveraging Forms
10 min	5 - Q&A
5 min	6 - Tips and Resources

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Introductions

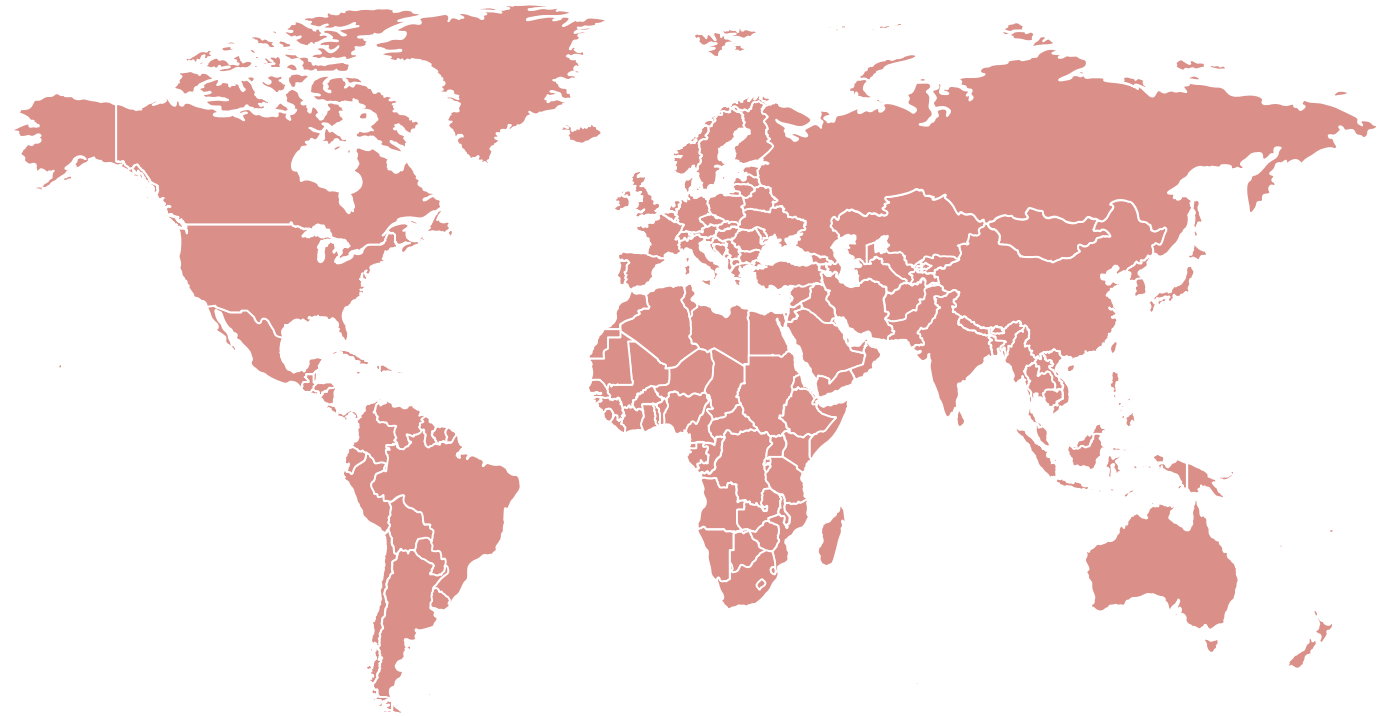
Welcome - Hosted by PwC



PwC's professional services, including **audit and assurance**, **tax** and **consulting**, cover such areas as **cybersecurity and privacy**, **human resources**, **deals** and **forensics**. We help resolve complex issues and identify opportunities across these industries.

Who's Here Today:

Lindsey Haynes
Shelly Gasperine



236,000 Professionals in 157 Countries

Why

Our purpose

To build trust in society and solve important problems

What

Our vision

To be the leading professional services firm in the world

How

Our values



Act with integrity



Make a difference



Care



Work together



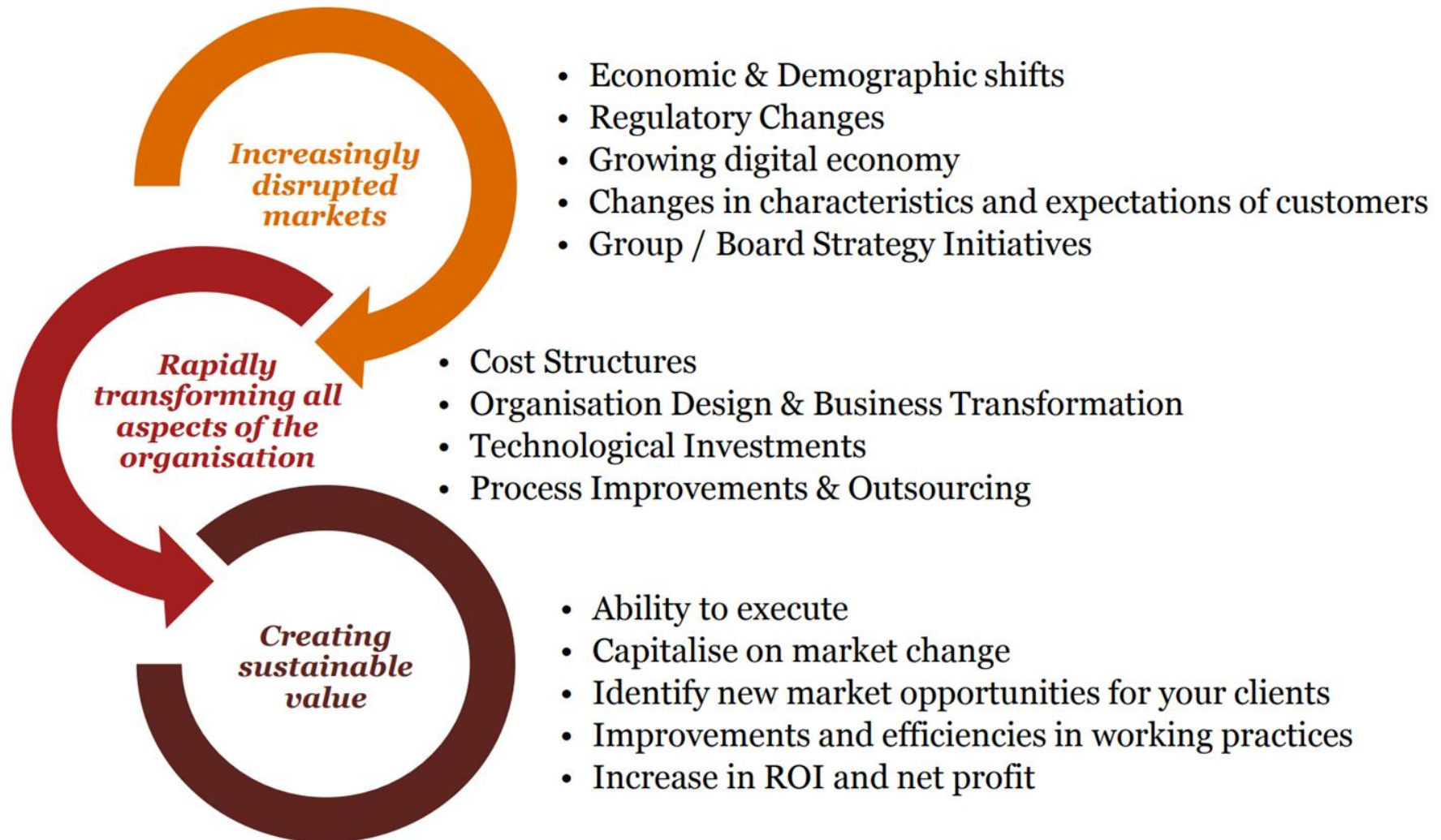
Reimagine the possible

2

Foundations of
Project Management

The strategic imperative for Project Management

“Today is the slowest rate of change we will ever experience”



When poll is active, respond at PollEv.com/firstwa

Text **FIRSTWA** to **22333** once to join



FIRST Teams - What is the biggest struggle with your current project execution and management?



Start the presentation to see live content. For screen share software, share the entire screen. Get help at pollev.com/app

Project Management – More than just a plan?

“We will either find a way, or make one”

“Don’t find fault, find a remedy”

Learning from failure

Organising Chaos

Retain and use knowledge

Managing Risk & Clearing Issues

Communication

Managing Quality

Managing Change

Managing Integration



Key Terms for Managing Successful Projects

Project Structure and Planning

- Vision
- Scope
- Goals / Milestones
- Gantt Chart / Project Plan
- Status Tracking

Resources and Budgeting

- Allocating Budget and Resources
- Budget-to-Actual Tracking

Monitoring Benefits / Project Health

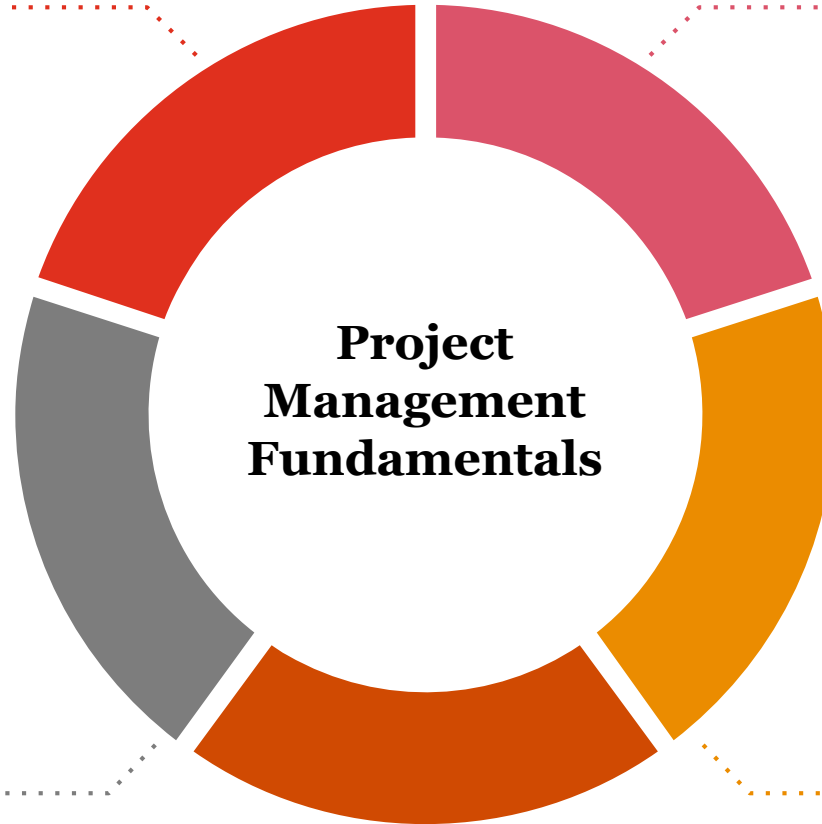
- Project success metrics
- Key Performance Indicators (KPIs)
- Dashboard / Project Health

Managing Stakeholders / Communications

- Stakeholder register
- Communications Plan
- Cadence

Managing Project Risk

- Risk Register
- Risk Mitigation
- Issue Tracker



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If one baker can make a loaf of bread in one hour in an oven, how many loaves can ten bakers make in one hour?



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Project Management Triangle

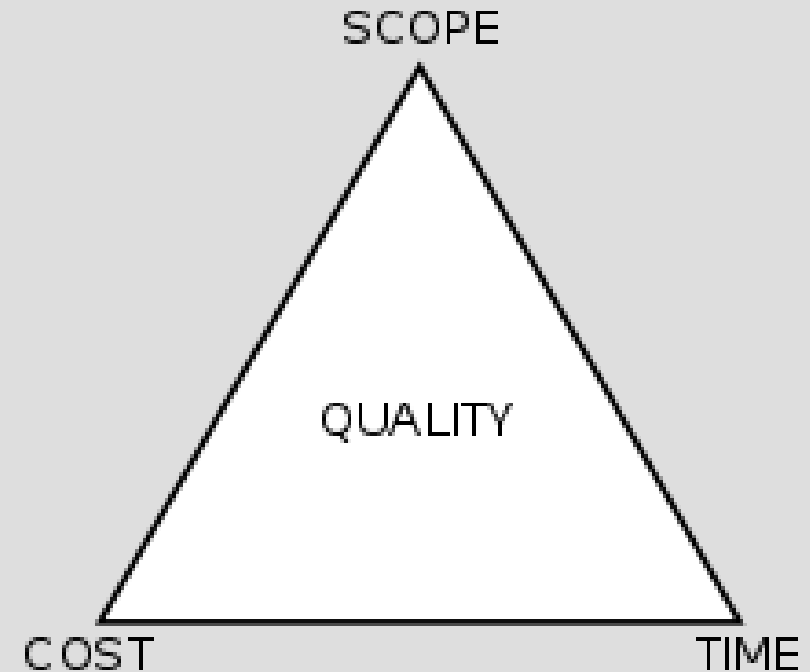
All projects, no matter how large, small or complex, have **the same triple constraint**

Projects are Limited / Restrained by:

- Scope
- Time
- Resources

Impacts Quality

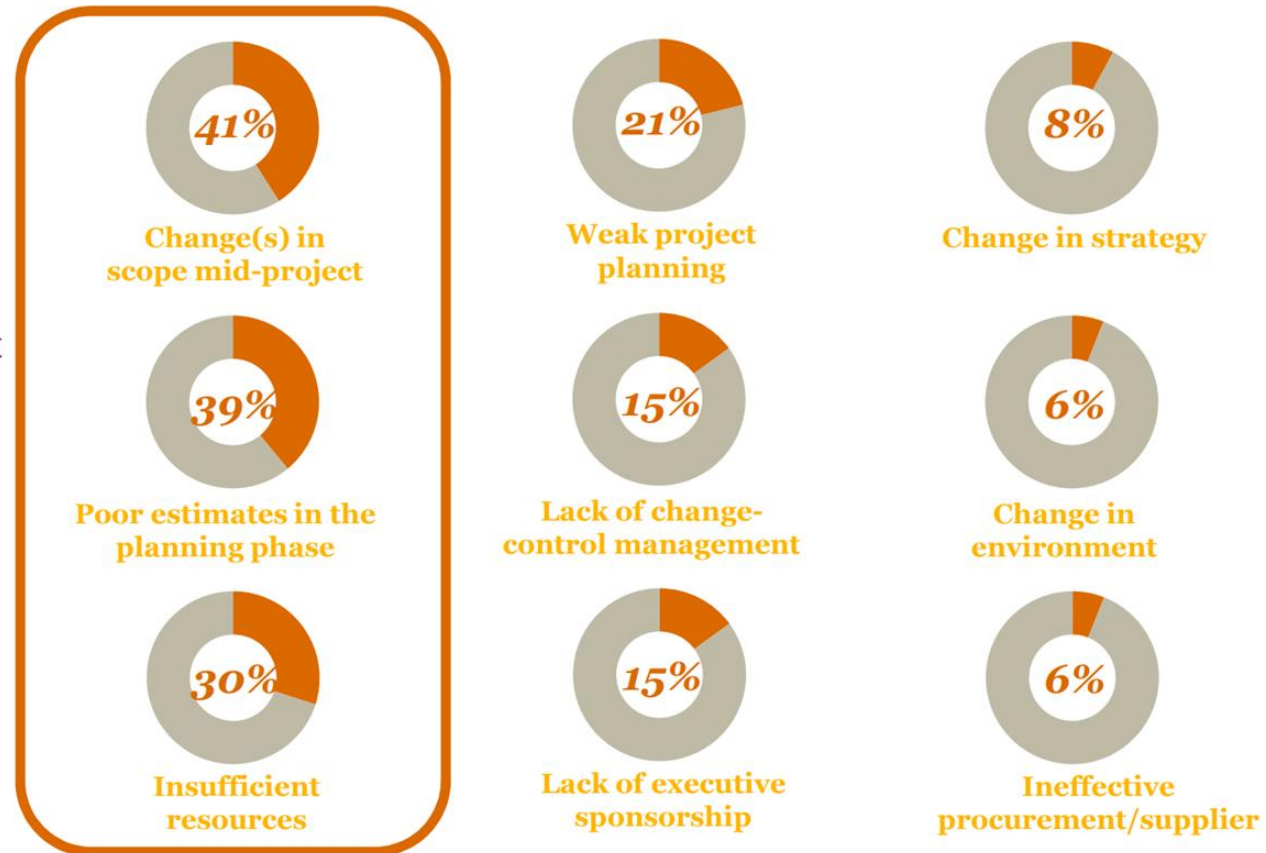
Triple Constraints Theory



Managing Project Risks - What can go wrong?

Why people who commission change don't get what they want?

The Top Three reasons for project failure – regular theme since 2004 !



Source : PwC PPM Survey 2014

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Managing Execution

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What project management tools does your team use today?

Ansana, Monday, Meister Task (or similar app based solution)

Google Sheets

Microsoft Project, Excel

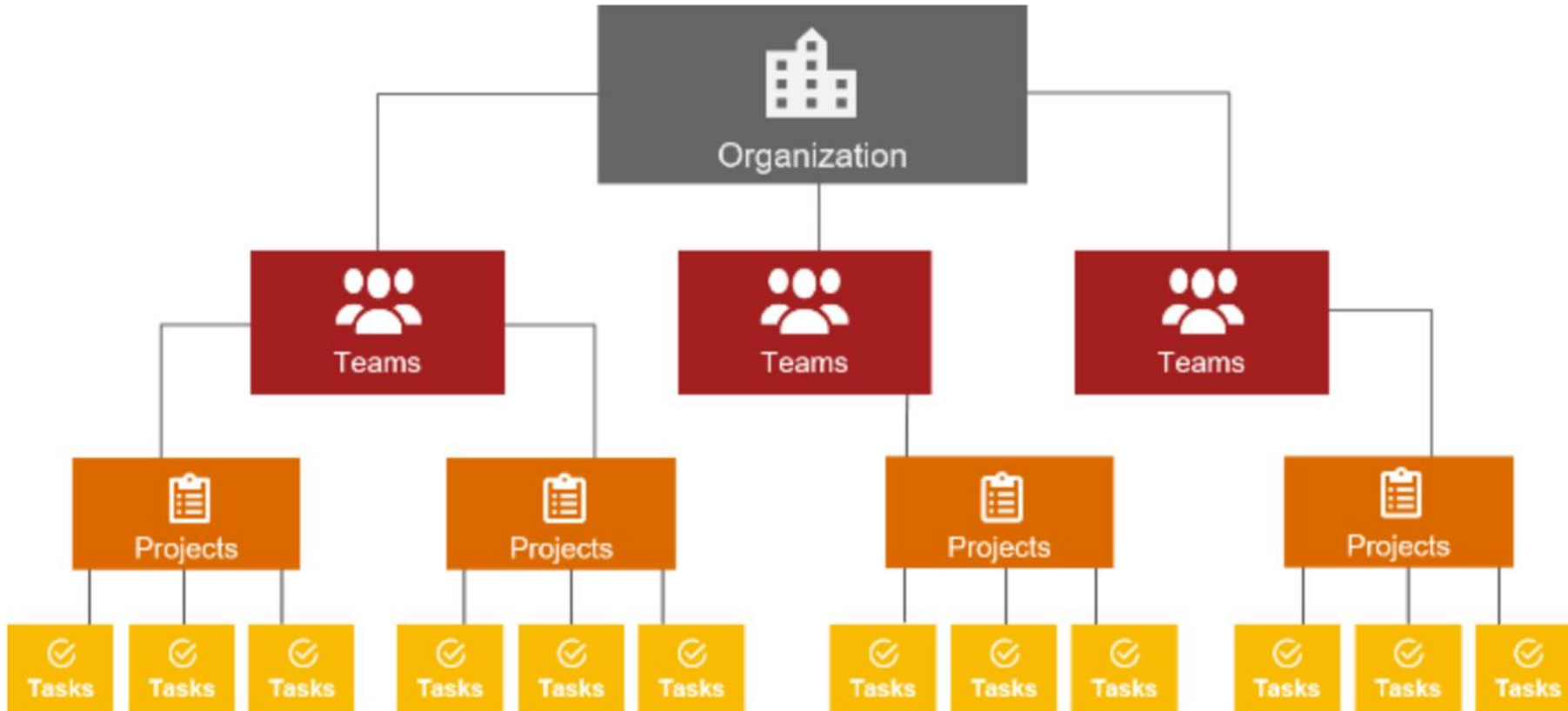
Post-its

JIRA



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Organizing your work - Teams, Projects, Tasks



Example Planning - Using Gantt Chart Templates

← Template gallery

PwC **General**

Purchase order

Employee shift schedule

Customer relationship management
by Copper

Website paid traffic report
by Supermetrics
Add-on

Website traffic dashboard
by Supermetrics
Add-on

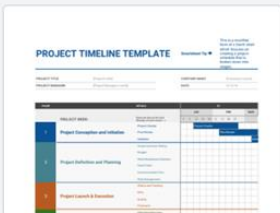


Analytics dashboard
by Sisense

Project management



Gantt chart
by Smartsheet



Project timeline
by Smartsheet



Project tracking
by Smartsheet



Event marketing timeline
by Smartsheet

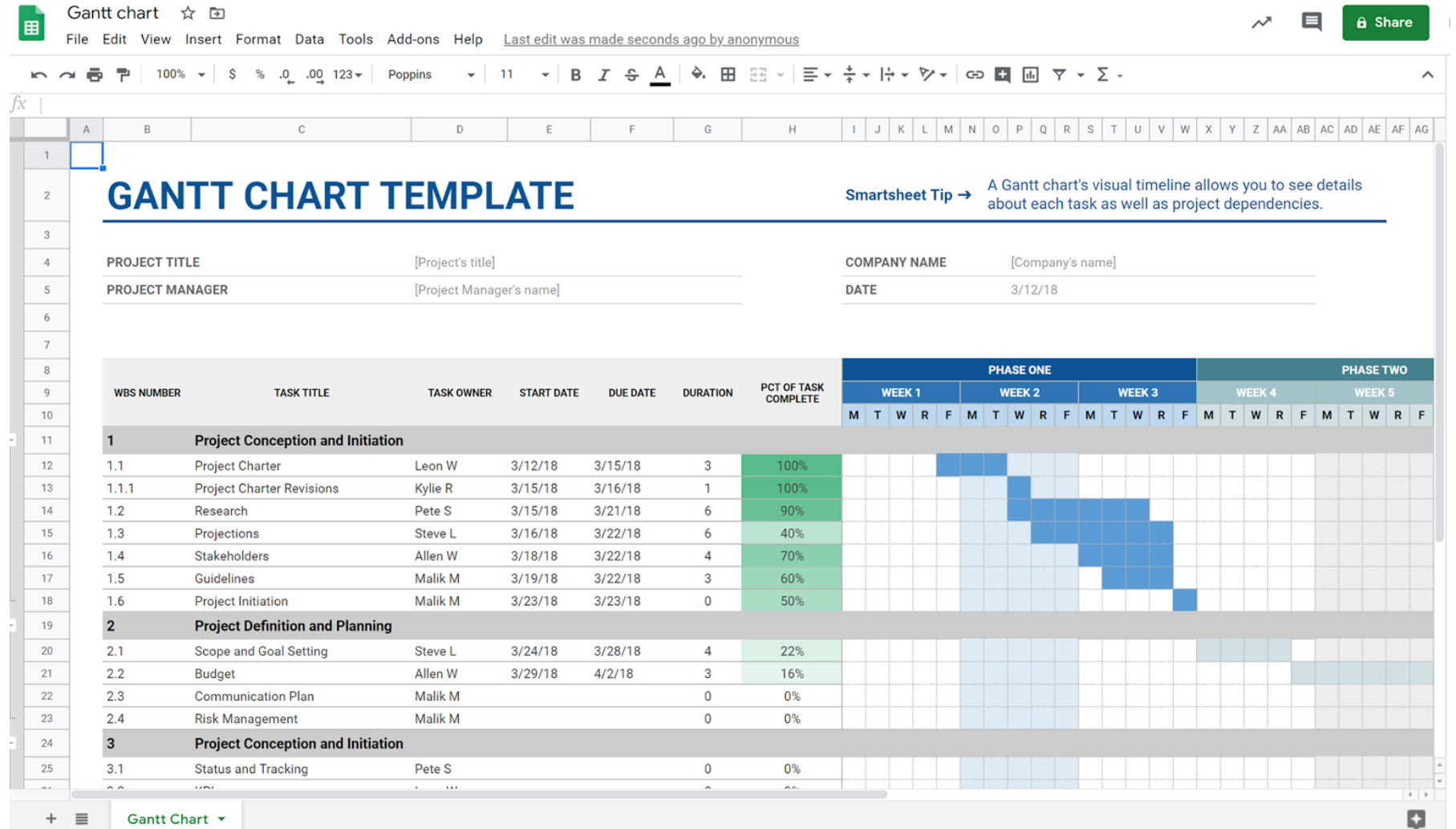
To locate an example Gantt Chart in Google Sheets

New > From Template > Project Management

Leveraging Gantt Charts for Project Planning and Tracking

In your planning processes, break work into Phases, workstreams and milestones

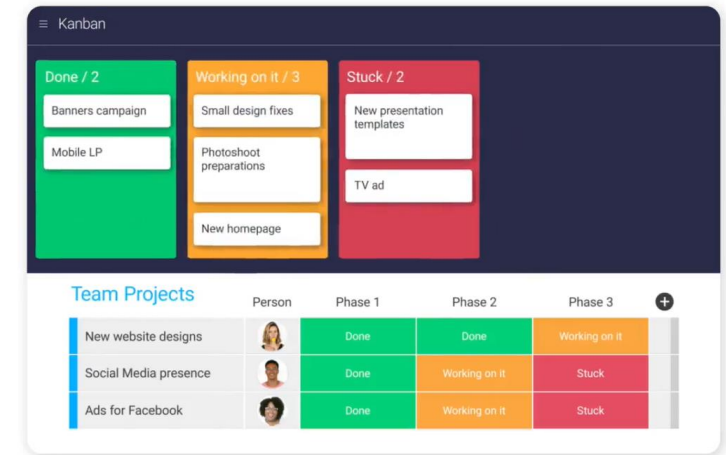
Many great project plan examples exist online, just like this one >>>>>



Leveraging Project Management Apps

Features that may be useful for project-management based apps

- Daily email reminders of tasks due.
- Drag and drop functionality.
- Standardized and custom templates.
- Ad hoc reporting.
- Mobile app.
- Forms integration.
- Private projects, if needed.
- Custom fields.
- Timeline and calendar views.
- Attachments and links to Google drive.
- Set recurring tasks and dependencies.
- Tags, likes, and @mentions.
- Status updates and reporting.



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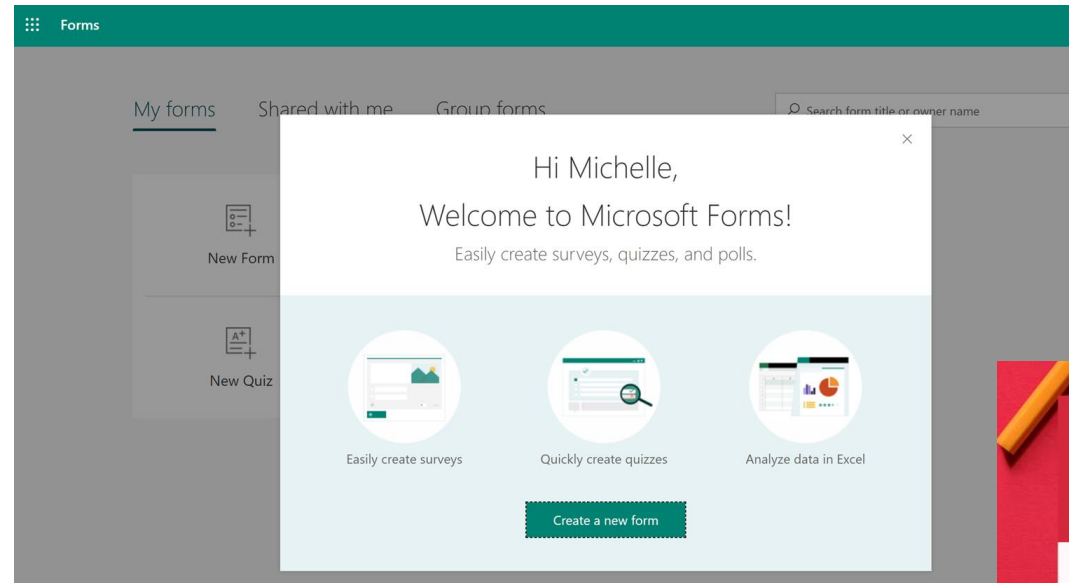
Workflow and
Automation

Leveraging Forms for Workflow

Automate and assign tasks and workflows.
Example - Team Procurement Request

Create a 'workflow',
like this [sample procurement request](#)
(Microsoft Forms)

Or [T-shirt Request](#)
(Google Forms)

A screenshot of a form titled "Team Apple - Materials Request" set against a red background with yellow pencils. The form has a subtitle "Describe order item, quantity, price and need". Below this, there is a note: "Hi Michelle, when you submit this form, the owner will be able to see your name and email address." A red asterisk indicates a required field. The first question is "1. What workstream does this items support" with radio button options: "Business/Marketing", "Design", "Build", and "Team Morale". The second question is "2. Describe item and need" with a text input field containing the placeholder "Enter your answer".

Create a Workflow - Using Forms

Remember, design with the end-result in mind :)

1 Create Poll / Form

Team Apple - Materials Request

Describe order item, quantity, price and need

Hi Michelle, when you submit this form, the owner will be able to see your name and email address.

* Required

1. What workstream does this items support

- Business/Marketing
- Design
- Build
- Team Morale

2. Describe item and need

Enter your answer

2 Distribute to Team

Send and collect responses

Only people in my organization can respond

Recipients can scan the code on a phone or tablet to access the form.



Download



3 Monitor Results

Forms Team Apple - Materials Request - Saved

Preview Theme Share

Questions Responses 5

5 Responses 00:58 Average time to complete Active Status

View results Open in Excel

1. What workstream does this items support

More Details

Business/Marketing	0
Design	1
Build	2
Team Morale	2

2. Describe item and need

More Details

4 Follow Up

Process / Workflow Design

Define process end-to-end, owners, and SLAs

[Example sheet here](#)

Process flow: Define Process / Outcomes

(bonus -- create in Visio)

Process Owner: (Finance)

Who fields the requests?

Service Level Agreement (SLA):

*When can your users expect a response?
e.g. reviewed in 24 hours*

Timestamp	What workstream does th	What is the item you woul	Product options / website	Total Price	Received By	Date	Status	Comments
			Total Requested	376.63	Total Approved	200.33		
					COLUMNS ADDED			
4	5/18/2020 23:22:39 Design	Revised team banner		56	Shelly		5/18 In Review	
5	5/18/2020 23:22:55 Build	Drivetrain		200.33			Rejected	Talked to Jose
6	5/18/2020 23:25:24 Team Morale	Smoothies and socks	Smoothie King	120.3			Complete	

Workflow - Automation Using Power Automate

Example of workflow automation with business rules

The screenshot displays the Microsoft Power Automate web interface. On the left is a navigation pane with options: Home, Action items, My flows, Create, Templates, Connectors, Data, AI Builder, Solutions, and Learn. The main area features a search bar and a header for 'Environments pwc (default) (Upgrade)'. A central card titled 'Start approval when a new item is added' shows a flow diagram: a teal box with the SharePoint icon labeled 'SharePoint' is connected by an arrow to a purple box with an approval icon, which is then connected to a red box with the Office 365 Users icon and a blue box with the Office 365 Outlook icon, collectively labeled 'Approvals, Office 365 Users, and Office 365 Outlook'. Below the diagram, a text block explains: 'Use this template for processing approvals on SharePoint list items. The approver can view their approval requests in the Approvals Center and over email. Once an item is approved or rejected, the item creator is sent a confirmation email.' At the bottom, a section titled 'This flow will connect to:' shows a connection to 'Office 365 Outlook Permissions' for the user 'michelle.l.gasperine@pw...' with a green checkmark and a menu icon.

Key Takeaways

What does it take
to drive
Successful
Projects?

Clear Scope

Resources

Communication

Technology

Measurement

Team

Q & A

5

Resources

Resources to Learn and Try

Financial and Project Management Resources

Great templates are available for:

- Gantt Charts
- Agile / Kanban
- Retrospectives
- Budgets

For example, free templates at:

- Google [Docs/Sheets](#)
- [Microsoft Office Templates](#)

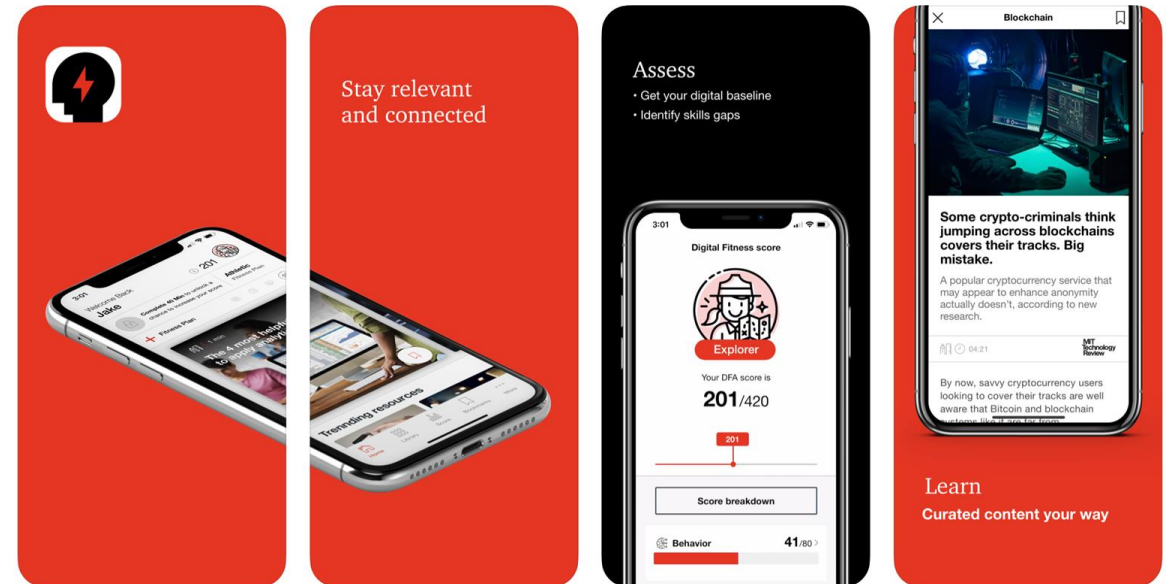
Apps / Tools

- Project Management - Asana, Trello, Basecamp, etc.
- Collaboration - Teams, Slack
- Team Retrospectives - [Retrium](#)

PwC Resources

Access Your Potential [Financial Literacy](#) Curriculum

PwC [Digital Fitness App](#)



PwC Earn Your Future Classroom

Sign up today at <https://app.pwcfdnearnyourfuture.org/>

The landing page features the PwC and Charitable Foundation logos at the top. A navigation bar includes links for Home, About Earn Your Future® Digital Classroom, Educator tools, Additional resources, and About the PwC Charitable Foundation. The main content area has a large header image of students with the text: "Welcome to Earn Your Future® Digital Classroom. Interactive curricula designed to empower young minds with financial and economic knowledge." Below this is a carousel with four slides, currently showing slide 1. The footer contains three columns: "About Earn Your Future® Digital Classroom" (exploring the video), "Financial literacy resources" (additional online resources), and "About the PwC Charitable Foundation" (initiatives addressing societal challenges).

The app interface shows a user at "Level 1" in the "Earn Your Future® Digital Classroom". Navigation tabs include "Modules", "My badges", and "Materials". A "Choose a module." prompt is displayed above a grid of seven module cards. The modules are: Module 1: What's the Risk?; Module 2: Save, Spend, or Share; Module 3: The Mystery of the High-Priced Heels; Module 4: Robot Games; Module 5: The Case of the Frazzled Friends; Module 6: Learn to Earn; and Module 7: Homeward Bound. The interface also includes "Tools" and "Sign Out" options.