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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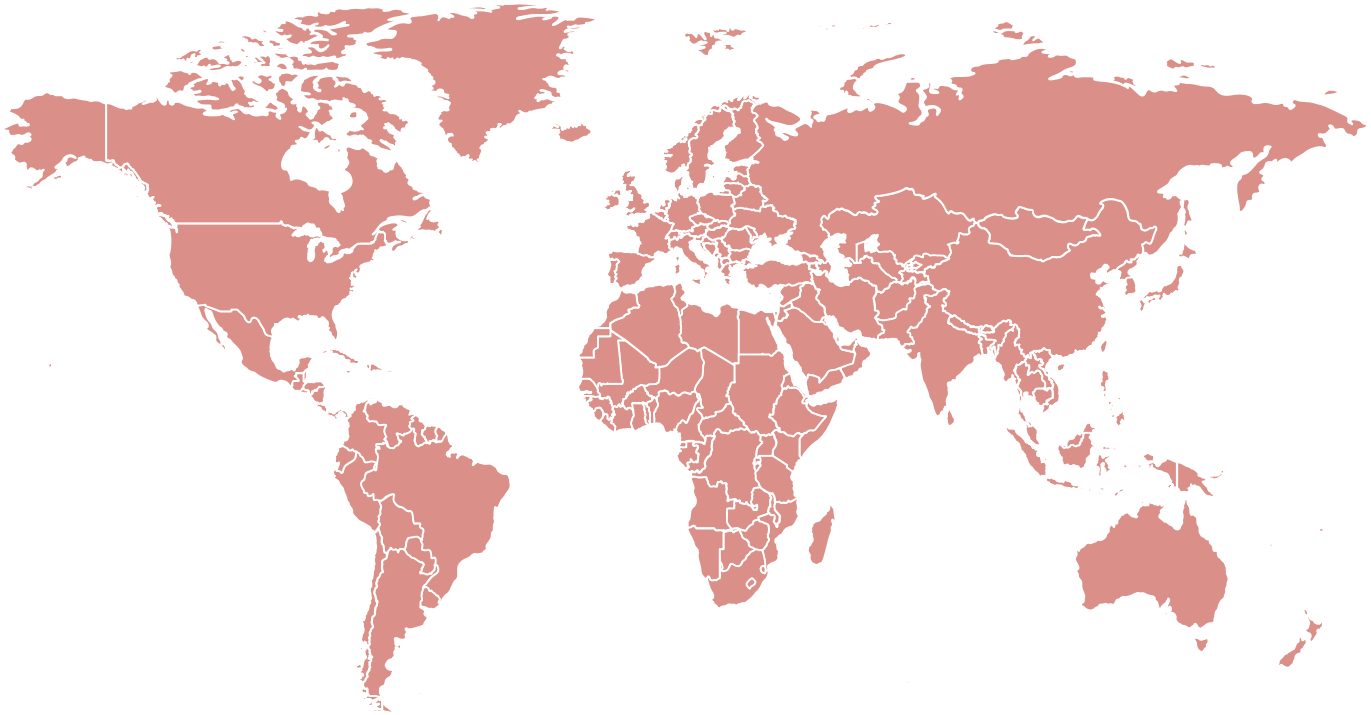
Introductions

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

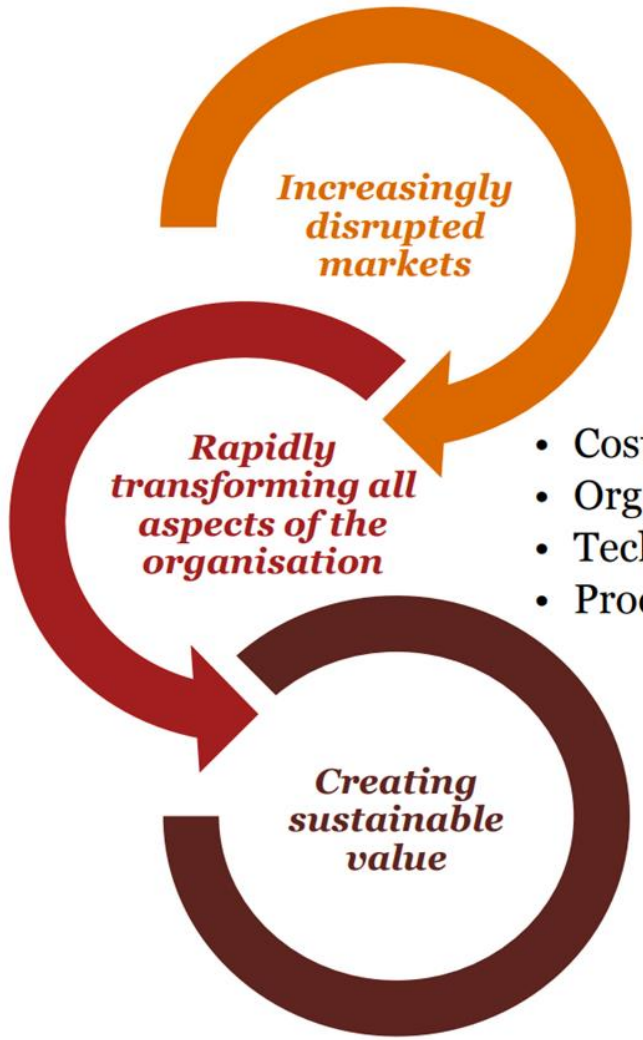
Reimagine the possible

2

Foundations of Project Management

The strategic imperative for Project Management

"Today is the slowest rate of change we will ever experience"



- Economic & Demographic shifts
- Regulatory Changes
- Growing digital economy
- Changes in characteristics and expectations of customers
- Group / Board Strategy Initiatives

- Cost Structures
- Organisation Design & Business Transformation
- Technological Investments
- Process Improvements & Outsourcing

- Ability to execute
- Capitalise on market change
- Identify new market opportunities for your clients
- Improvements and efficiencies in working practices
- Increase in ROI and net profit

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

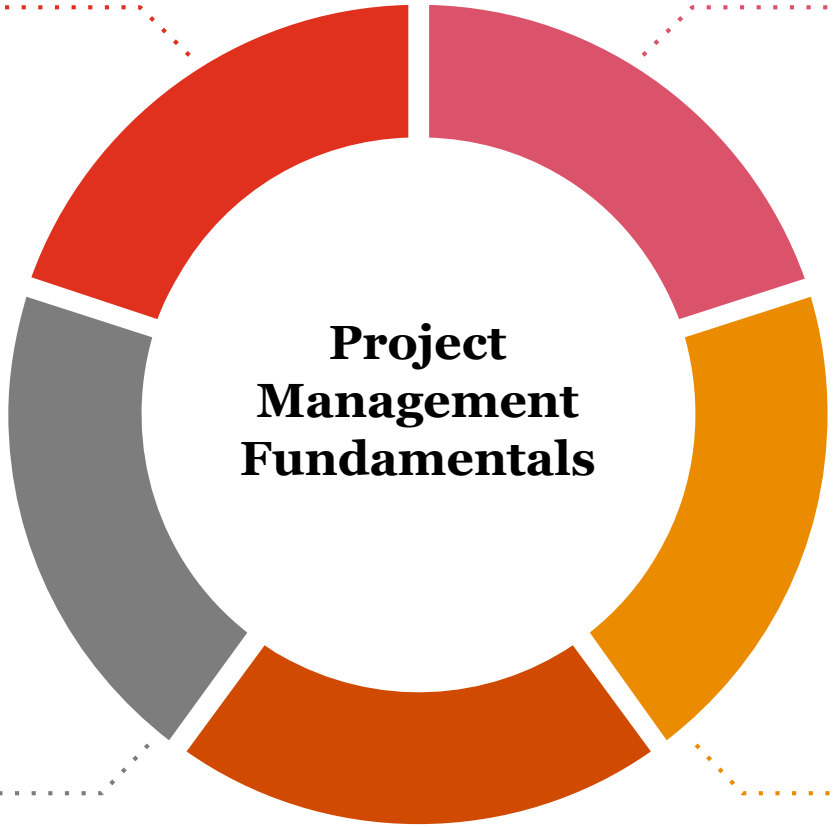
Key Terms for Managing Successful Projects

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

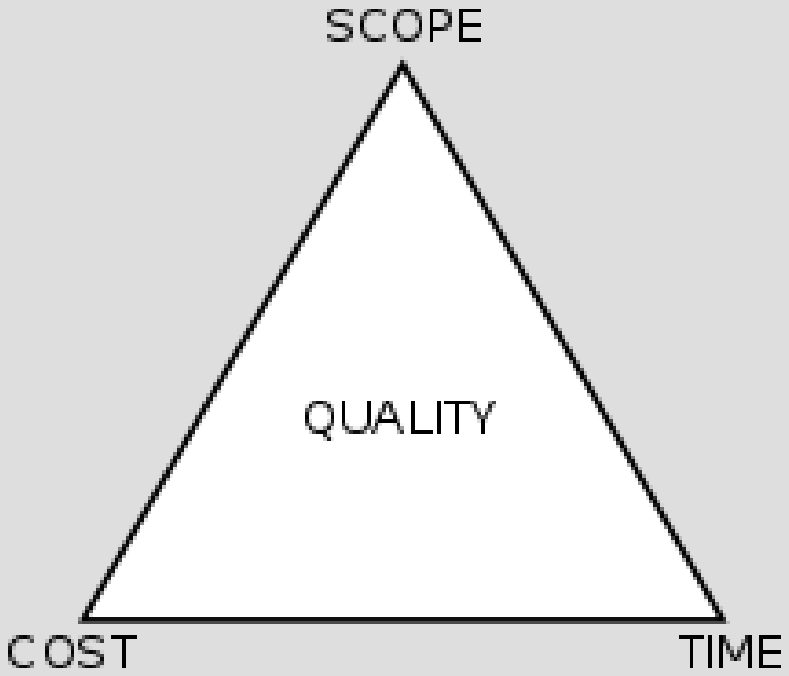
All projects, no matter how large, small or complex, have **the same triple constraint**

Projects are Limited / Restrained by:

- Scope
- Time
- Resources

Impacts Quality

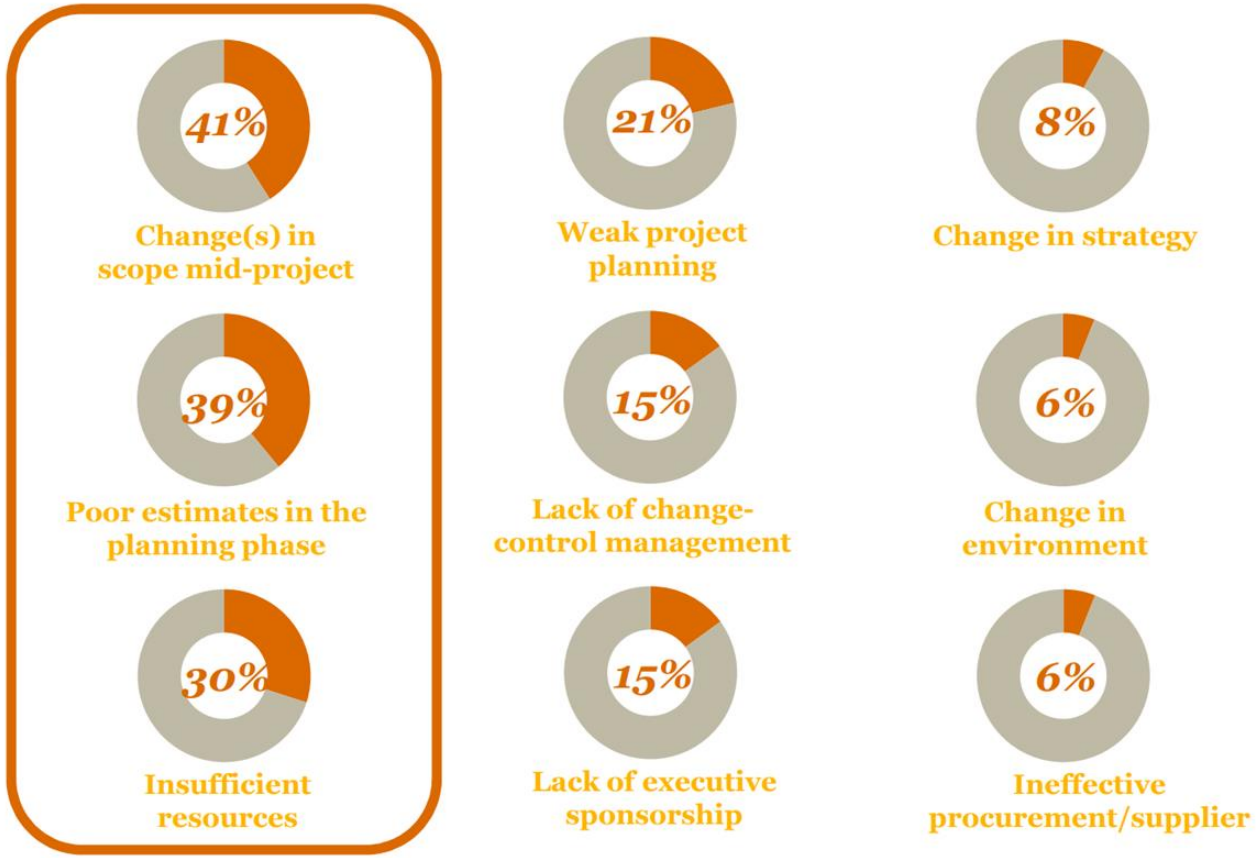
Triple Constraints Theory



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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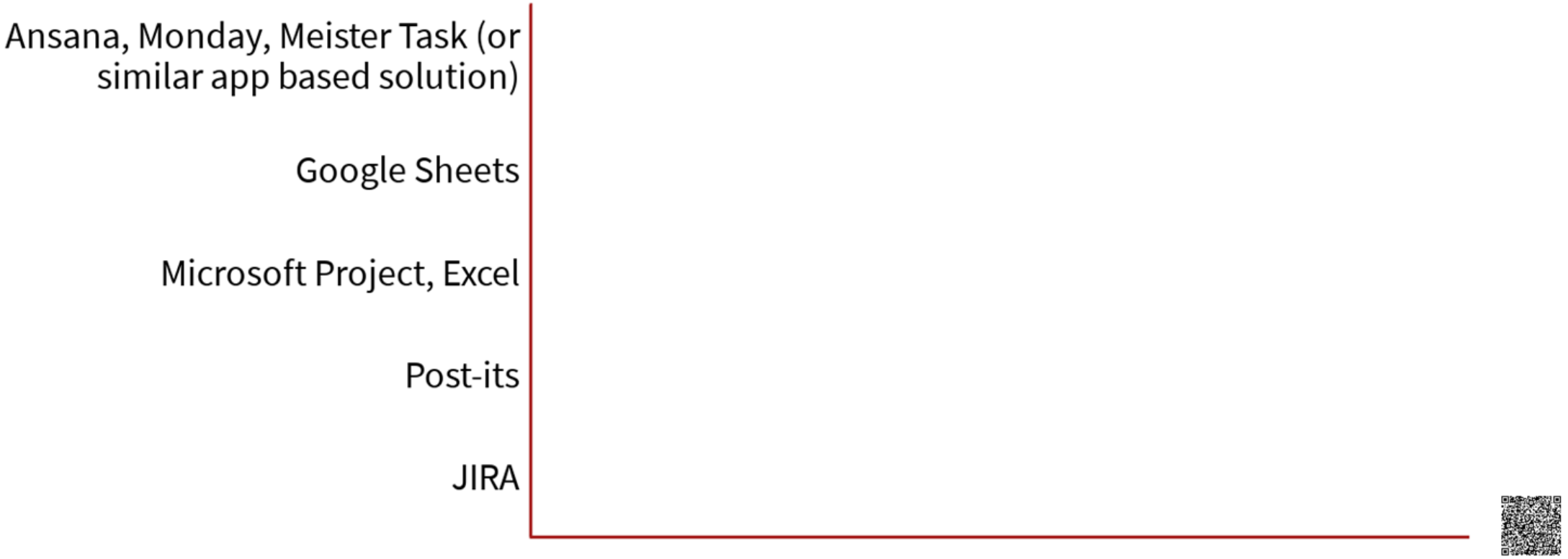
What project management tools does your team use today?



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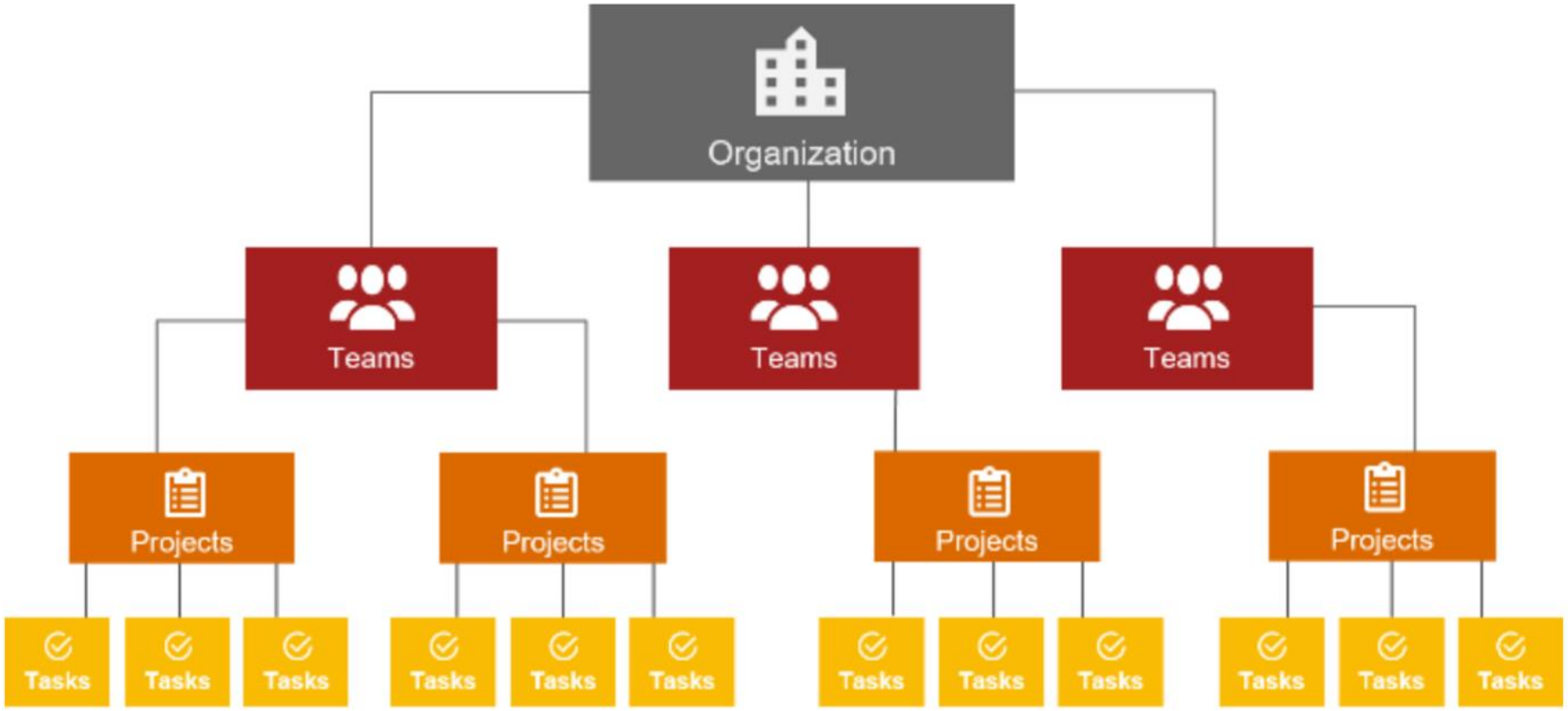
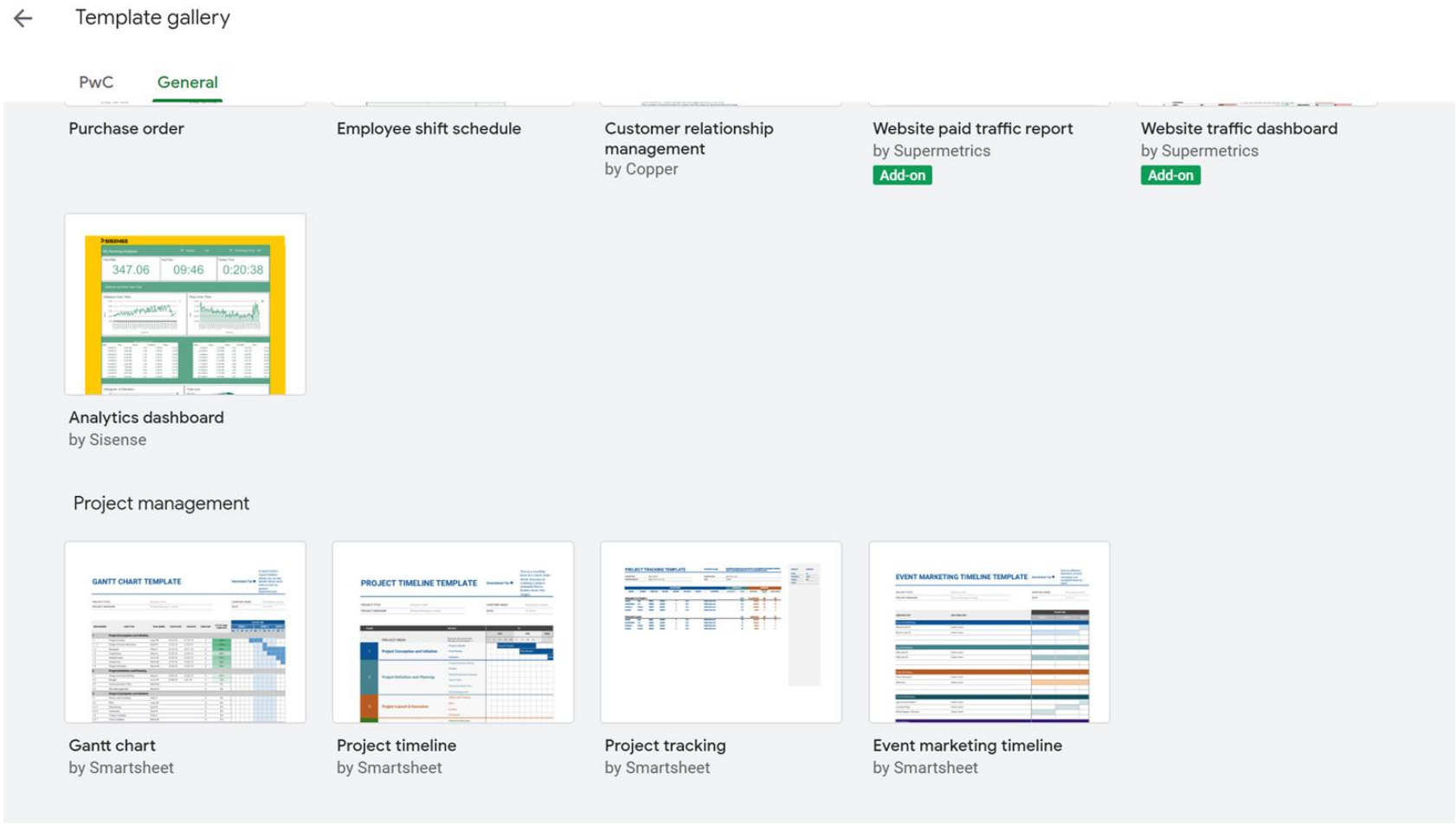
Organizing your work - Teams, Projects, Tasks



Example Planning - Using Gantt Chart Templates



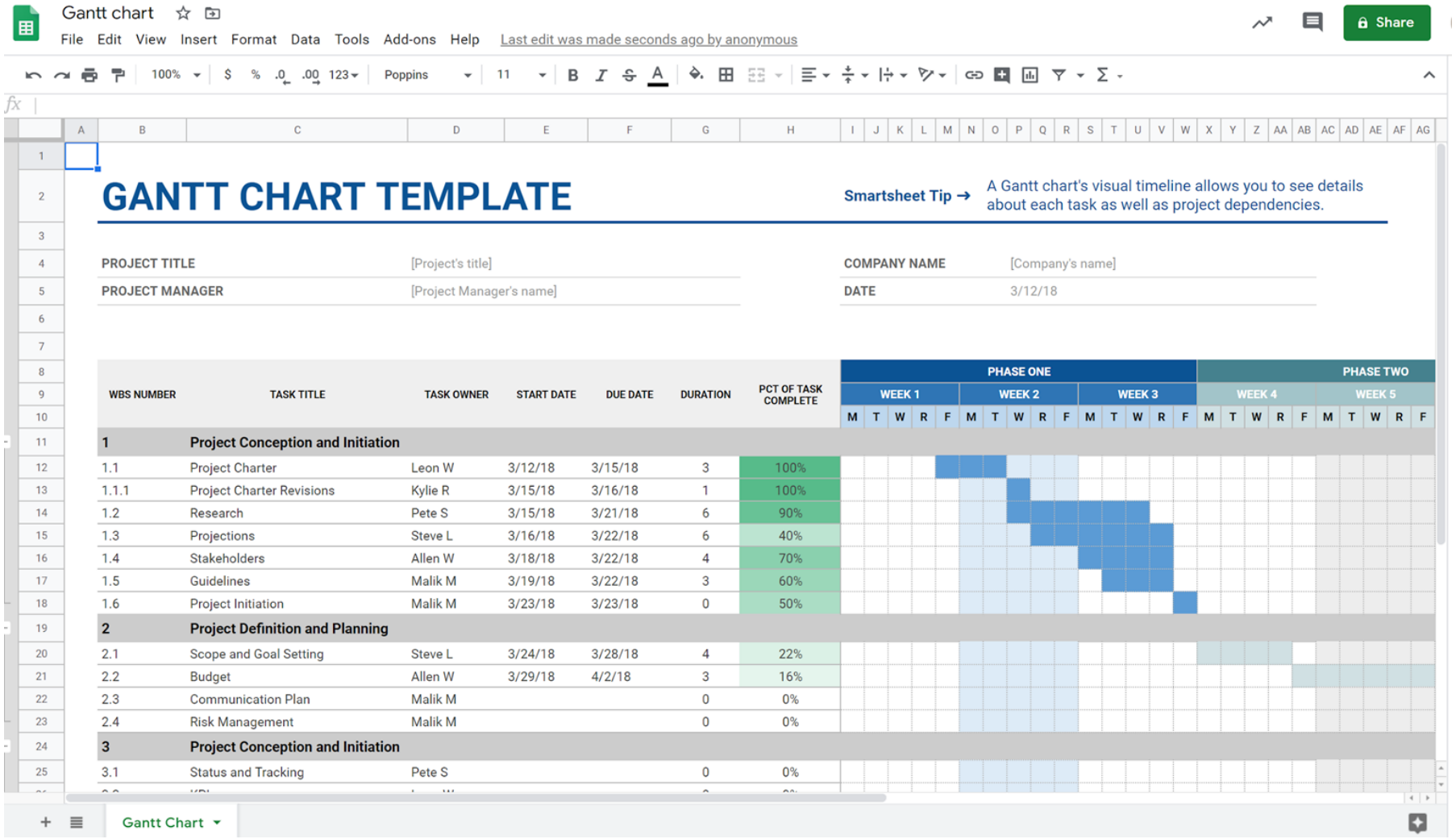
To locate an example Gantt Chart in Google Sheets

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 >>>>>

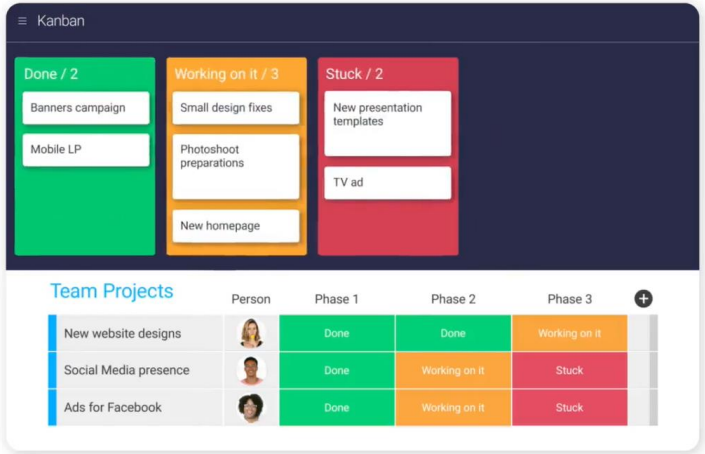


Leveraging Project Management Apps

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.

asana



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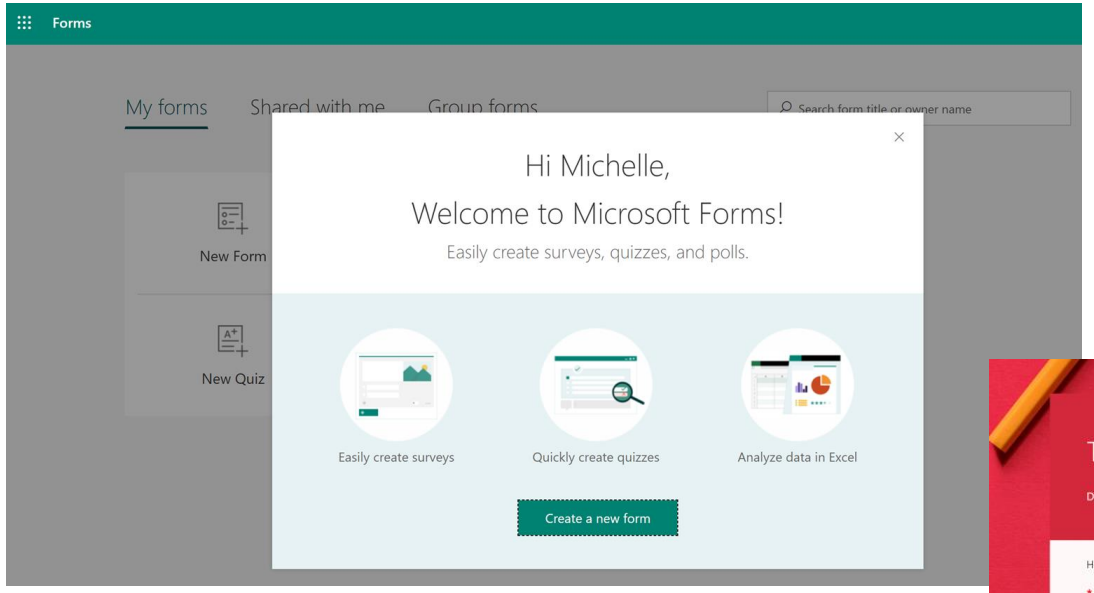
Workflow and Automation

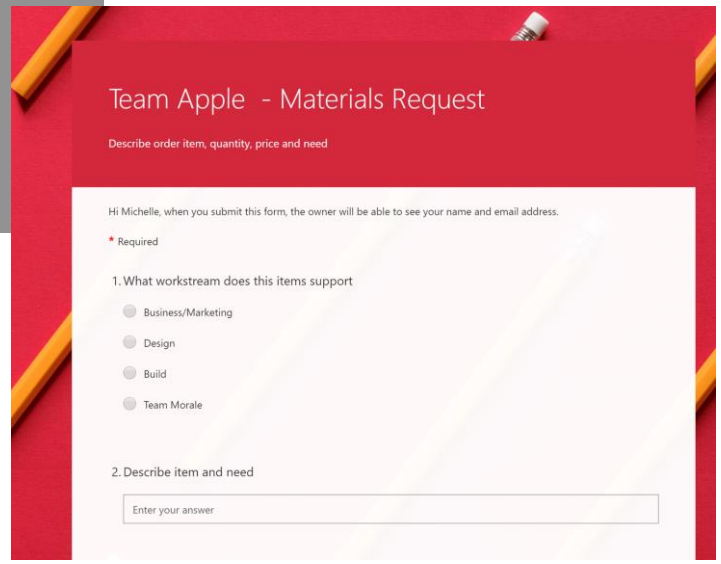
Leveraging Forms for Workflow

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)

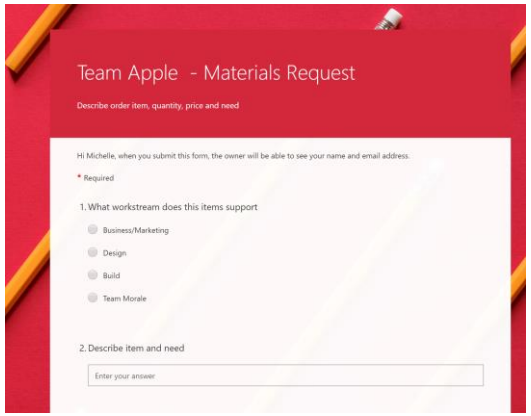




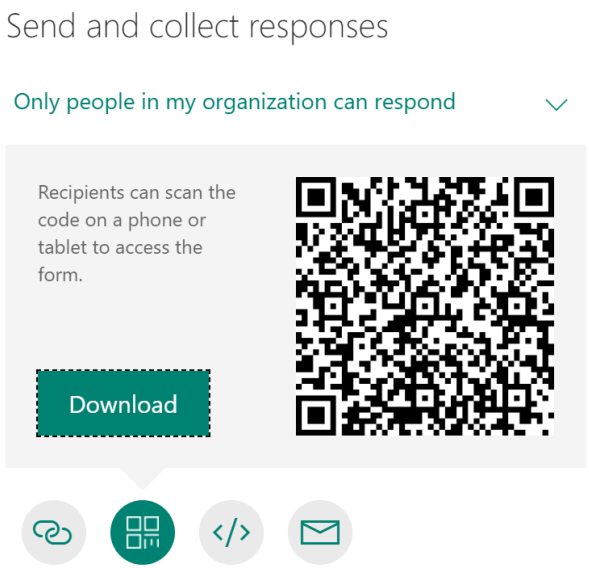
Create a Workflow - Using Forms

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

1 Create Poll / Form

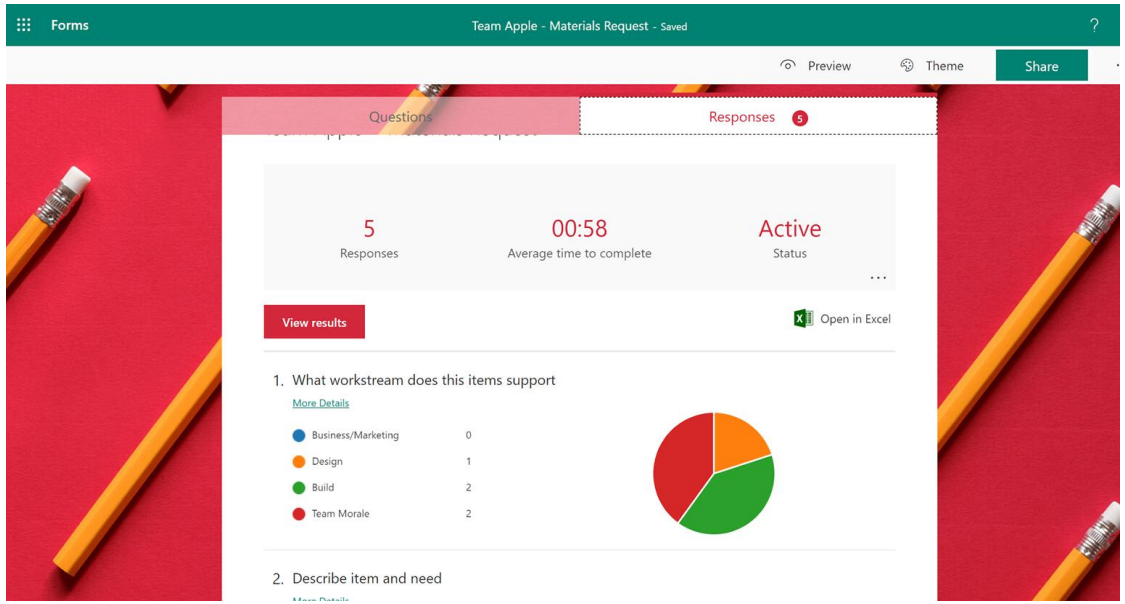


2 Distribute to Team



3 Monitor Results

4 Follow Up



Process / Workflow Design

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

[Example sheet here]

Process flow: Define Process / Outcomes

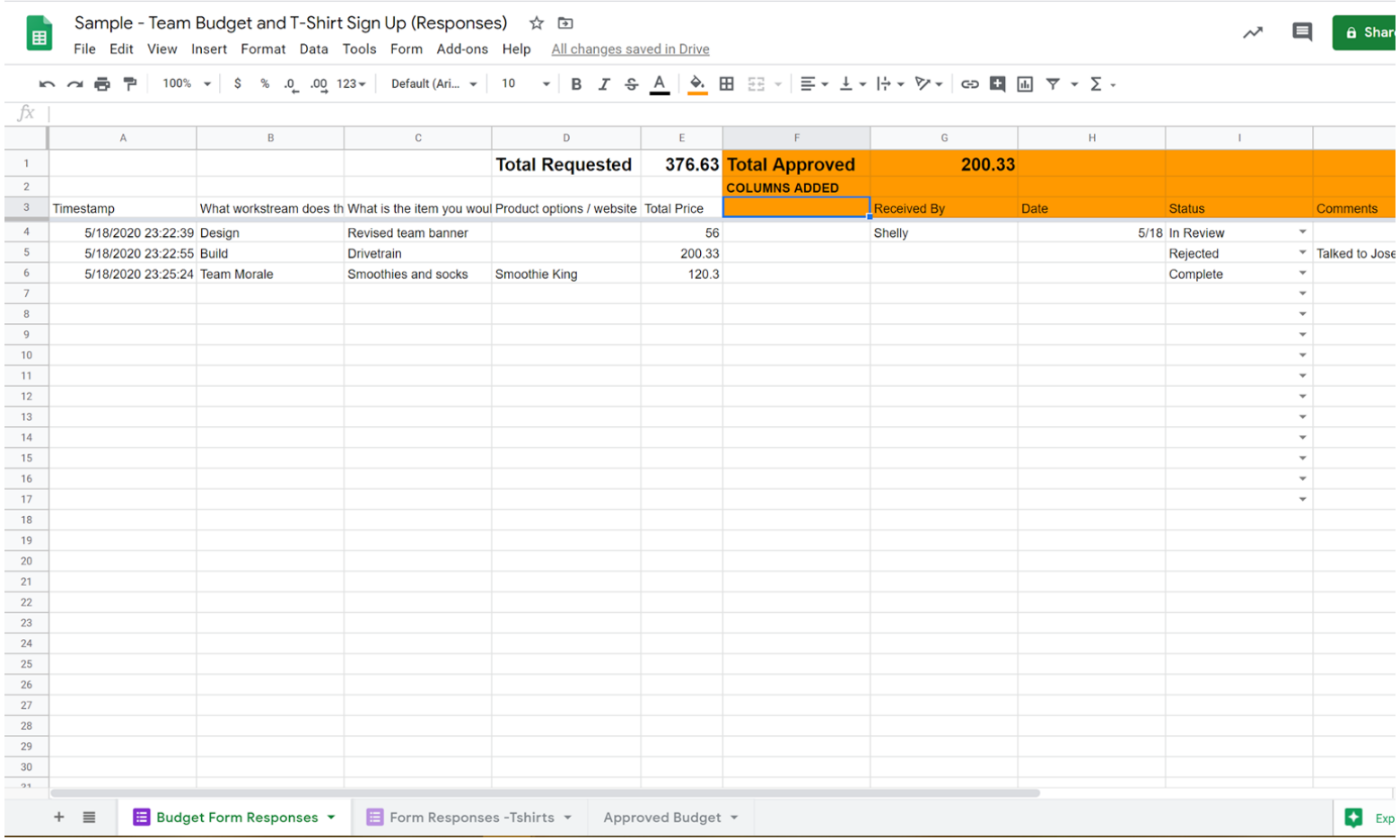
(bonus -- create in Visio)

Process Owner: (Finance)

Who fields the requests?

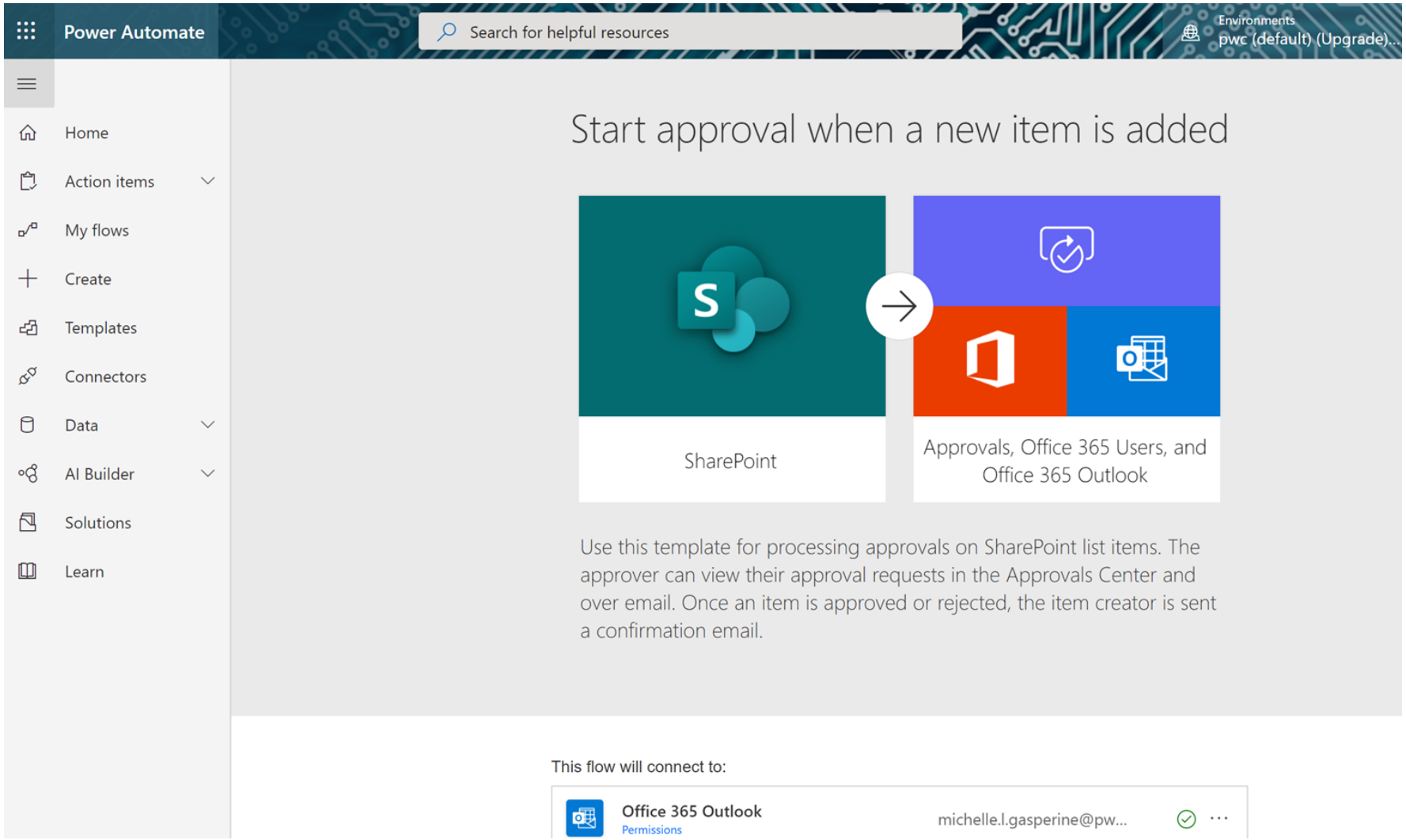
Service Level Agreement (SLA):

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



Workflow - Automation Using Power Automate

Example of workflow automation with business rules



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

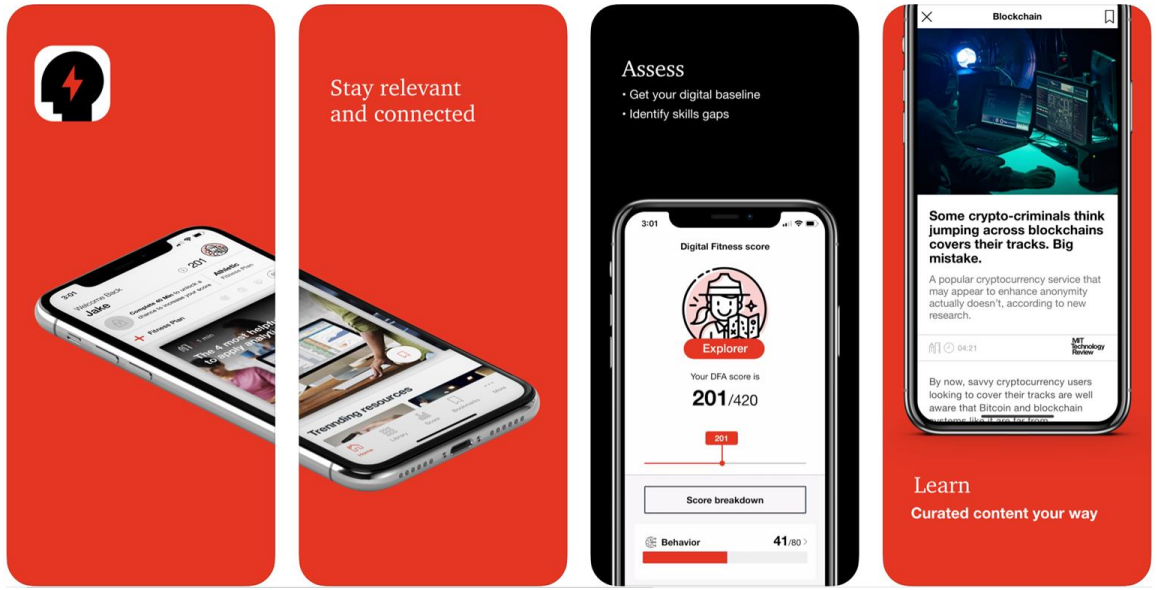
Apps / Tools

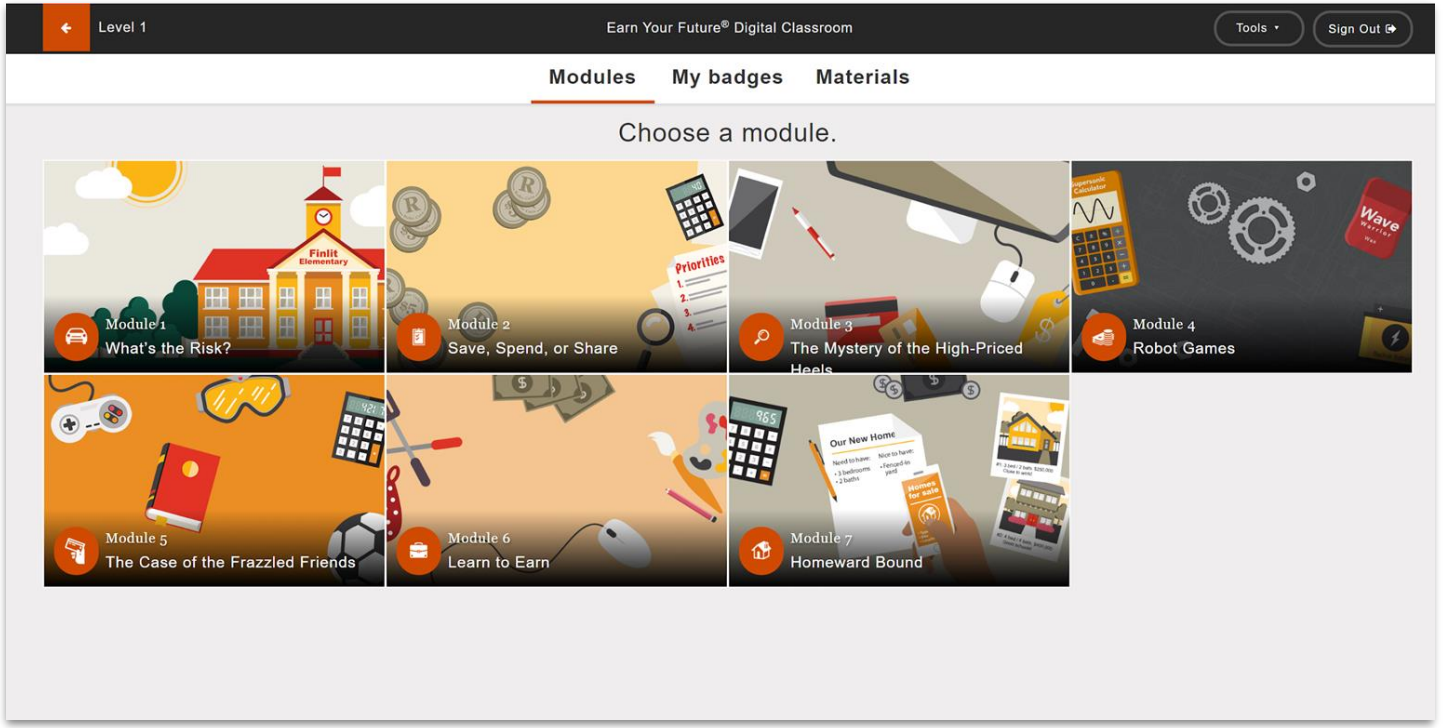
- Project Management - Asana, Trello, Basecamp, etc.
- Collaboration - Teams, Slack
- Team Retrospectives - Retrium

PwC Resources

Access Your Potential Financial Literacy Curriculum

PwC Digital Fitness App



PwC Earn Your Future Classroom

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