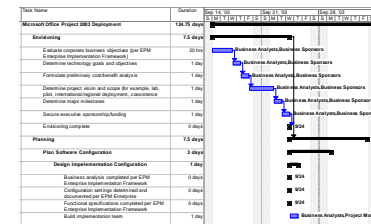


project management fundamentals



*an introduction to projects
and
project management methods*

Step 1 - Admitting We Have a Problem

A notable author (Brown) once defined insanity as doing the same old things in the same old way and expecting a different result.

If we continue to operate in such a way that we refuse to learn from our own results, our history – not only are we certainly condemned to repeat it (Santayana), but we perpetuate a cycle of personal and professional failure. In the end, perhaps that is the true insanity.

So...let's all agree to: (1) open our minds, (2) work to learn some new things we can apply within our own circle of influence, and (3) try to have some fun while accomplishing 1 and 2.

Course Objectives



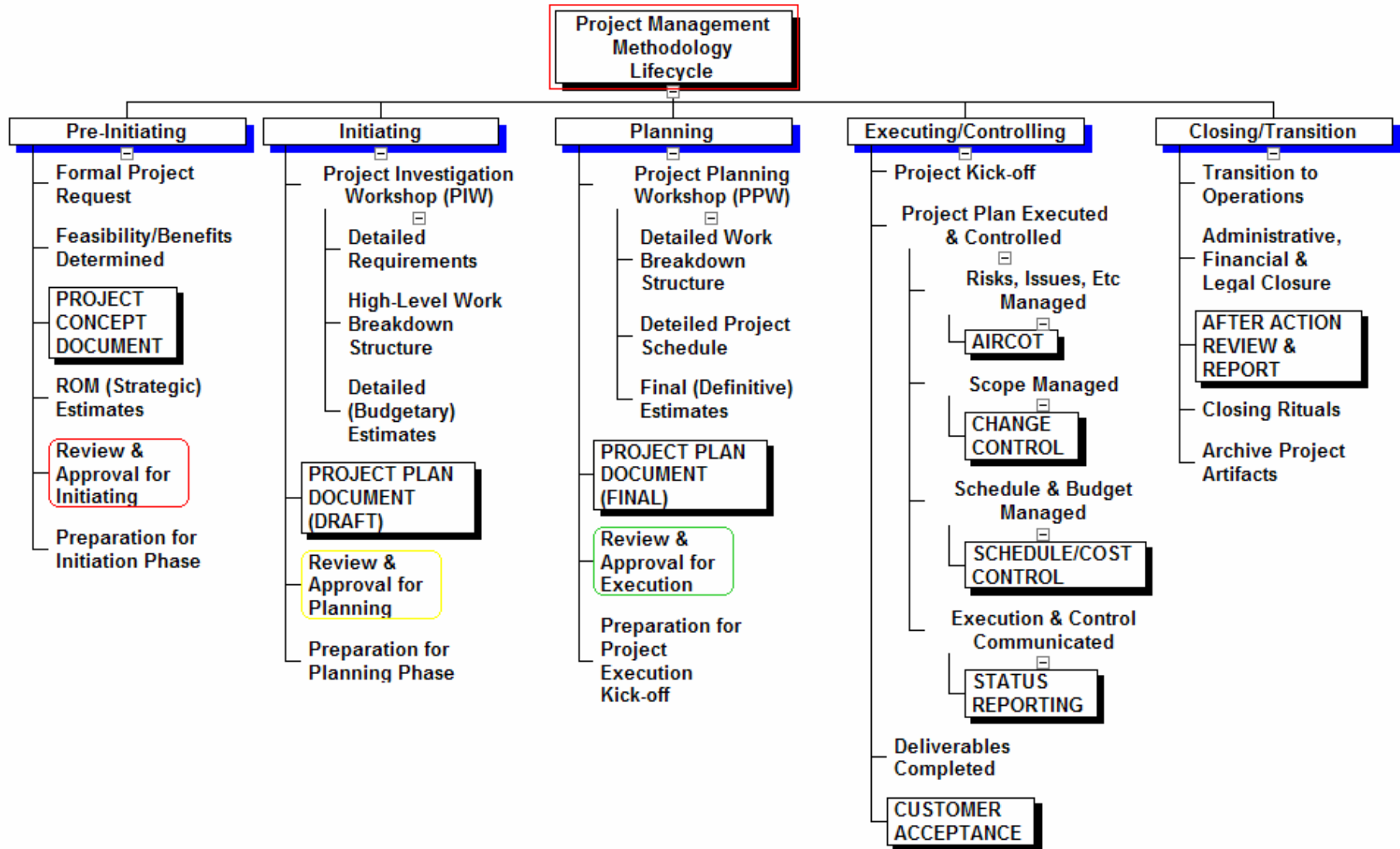
- Understand some of the history and background, but more importantly, the value and practicality of Project Management and using a methodology
- Learn about a Project Management Methodology's phases and activities
- Better understand Stakeholders, Requirements, the Work Breakdown Structure, Estimating and Project Controls
- Be more aware of the Human Elements in projects and their potential impacts
- Understand about tailoring PMM activities and outputs to projects and non-projects of various sizes

Remember the Following



- We will be discussing *generally recognized best practices* as well as processes and tools aligned with the PMBoK®
- *Hope* is neither a strategy nor a methodology
- No strategy, methodology, or best practice replaces a *thoughtful, functioning brain*
- A *methodology* is simply a collection of standardized processes and tools...but it *is nothing if it is inflexible*
- Ultimately, "*...the project team is responsible for determining what is appropriate for its project...*" (PMI)

The Project Management Methodology



initiating

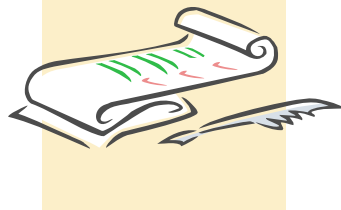
starting off in the right direction

Name	1st Quarter			2nd Quarter			3rd Quarter			4th Quarter		
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Objectives to Work - Traceability



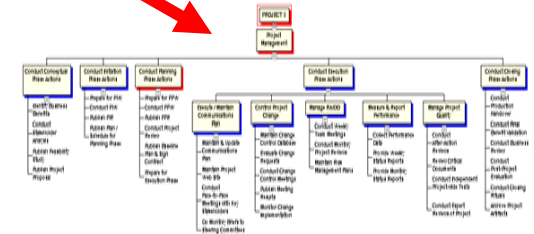
Sponsor's Objectives



Detailed Business Requirements



Major Deliverables



Detailed Work Breakdown

In-class Practice 2

Instructor Facilitated

- ◆ Revisit the *Overview*
- ◆ Identify some *AIRCOT* items
- ◆ Determine the project's *Priorities*
- ◆ Identify and process the *Business Requirements*



AIRCOT - Prior
- Rqmts



Team Lab 2

- ✦ Revisit the *Project Concept Document*
- ✦ Start the *AIRCOT* process
- ✦ Develop your *Project Priority Matrix*
- ✦ Identify and process *Business Requirements*



planning

leaving no stone unturned

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Where We Came From...

1. Understanding the Sponsor's ***Objectives***
2. Distilling Objectives into ***Business Requirements***
3. Categorizing those Business Requirements into ***Major Deliverables***
4. Understanding the ***Quality*** that must be achieved and the ***Risk*** the sponsor is willing to take
5. Decomposing the Major Deliverables into a Detailed ***Breakdown*** of all the Work (WBS)

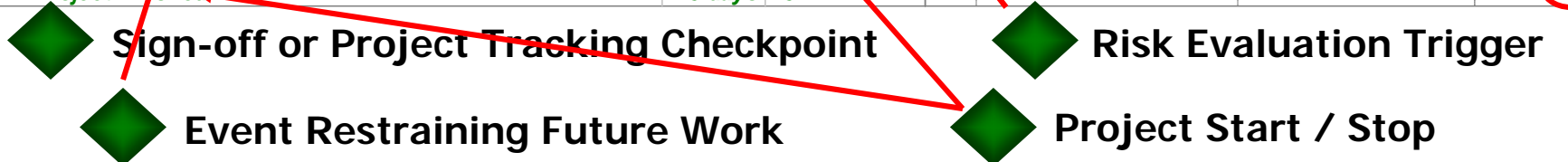
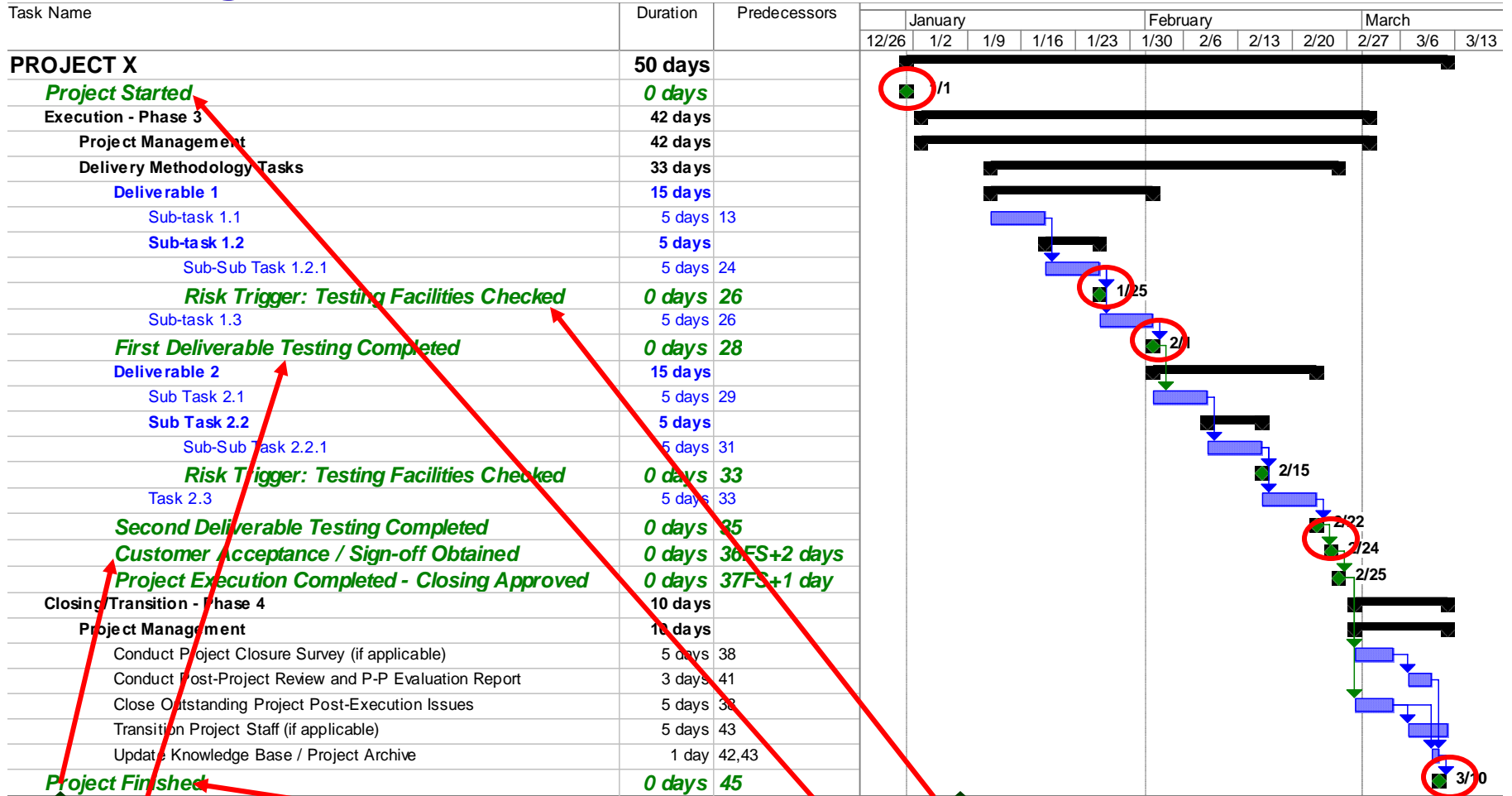
...Where We're Going

6. Ordering & linking all tasks into a ***Precedence Network***
7. Estimating ***Effort & Duration*** for all lowest level tasks
8. Estimating ***Resources*** required to complete the tasks as initially scheduled
9. Building the ***Schedule*** and then Optimizing it
10. Producing ***Total Project Schedule & Cost Estimate***:
 - Effort for the project is the sum of tasks' effort
 - Include procurement items
 - Add other expenditures such as travel, etc.
 - Sum for total estimate



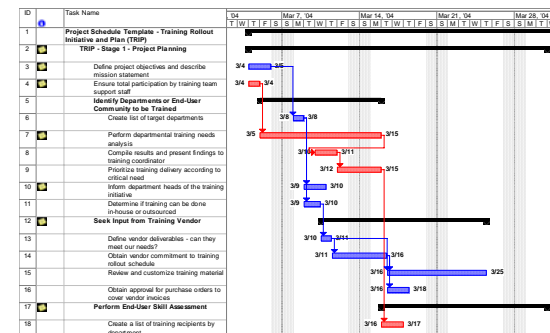
2nd Time
Around

Using Schedule Milestones



The Critical Path Explained

- The Critical Path Method is a network review technique used to predict total project duration
- The critical path for a project is the series of activities that determines the *earliest date* the project can be completed, or in other words...
- ...the critical path is the *longest path* through the project, and by definition, has zero slack or float
- If even one task on the critical path takes longer than planned, the entire project schedule will slip (be late) *if* the team does not take corrective action
- The critical path does not necessarily contain the most critical, most complex, or most costly tasks
- Understanding the critical path, and where it is, can help you determine where to make schedule trade-offs
- The critical path can change



monitoring & controlling

keeping the train on the tracks

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Communications Management



Right Info

- Project Managers spend 80% or more of their time involved in some form of communications
- “More” (a lot) of communication is not always “better”
- Appropriate communication helps keep Stakeholder expectations under control
- The key is to have a formalized Plan – it doesn’t have to be massive, but it must be formal; that is, written down and Distributed
- The PM should ensure that Performance related communications (reporting) is regular and frequent
- The plan should include obtaining feedback to tweak the plan

What Will We Do About Risks?

- **Identify** and review risks using the AIRCOT process
- Assign responsibility for risk ownership
- **Assess** identified risks by determining their probability of occurring and their impact if they do
- Focus assessment along the critical path
- Develop risk **Response Plans** – both preventative and contingency
- Ensure there are tasks and milestone triggers in your plan
- **Control** by implementing & managing your risk plans and continually evaluating plan effectiveness

Change Control Management

- Change is a fact of life
- Not all change is bad
- Uncontrolled change on projects *is* bad – we want to “do away” with “the scope creep”
- We must establish procedures (a Change Control System) for managing change to the scope of our projects – it must be published, discussed and, most importantly, consistently applied



Change
Requests

Quality Management

- How do we define quality?
- More importantly, how does the *project sponsor* define quality?
- The International Organization for Standardization (ISO) defines quality as the totality of characteristics of an entity that bear on its ability to satisfy stated or implied needs
- Other experts define quality based on:
 - Conformance to Requirements: meeting written specifications
 - Fitness for Use: ensuring a product can actually be used as it was intended



Performance Management

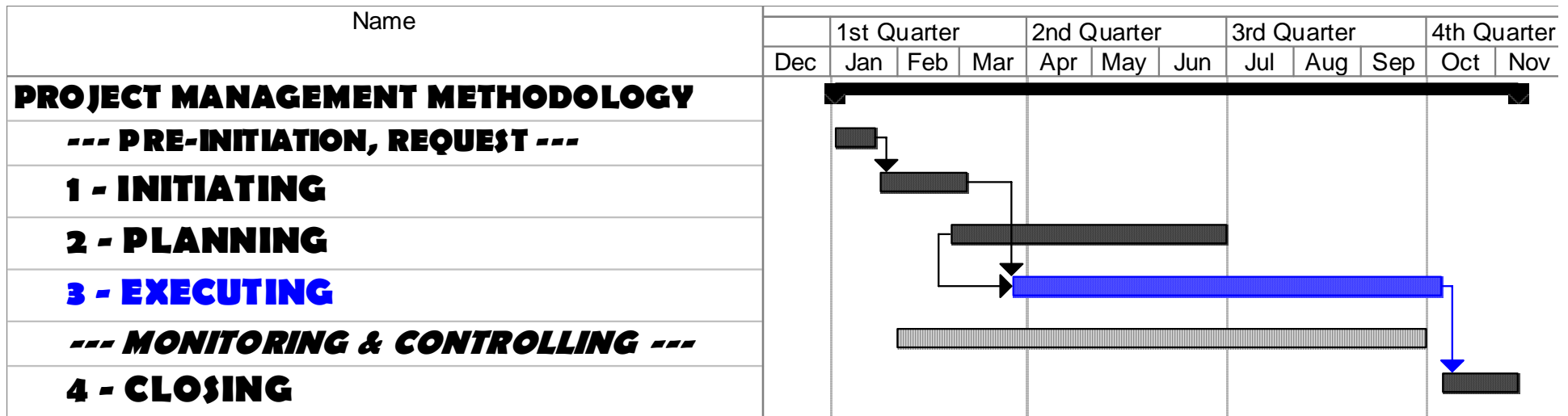


- Makes the assumption we have completed a *detailed*, well-ordered *project schedule and budget*
- Also assumes we have *baselined our project plan* and that we have the skills necessary to track *actuals* against a *plan*
- If the assumptions are correct, we will *gather data, validate it*, and produce information in the form of *reports*
- We will then ensure the appropriate *distribution* of this *information* – the right information, to the right audiences, at the right time; *stakeholders* need to know how well resources are being used to achieve project objectives
- However, we are not just going to report! We are eventually going to take *corrective action* based on the measurement of our performance. That is the “management” aspect of the control.



StatRep

executing *stand and deliver*



The Project Manager's Routine



- *Communicate Tasks* due and those coming due to project team
- *Collect Actuals* for "time on tasks" from team members and task completion updated
- *Update Tracking / Control Tools* (AIRCOT Log, Change Control Log, Cost Tracking)
- *Update the Schedule / Project Plan*
- *Analyze the Plan* for rescheduling and resource balancing (optimize)
- *Create and Communicate Status / progress* to customers and team – make assignments for action items for next reporting period
- *Look Ahead and Take "Proactive Action"* to eliminate potential problems

Dealing with Variances



- Actuals vs. Plan – you will compare current actual data to the baselined project plan
- Focus identification of project variances in the schedule and budget
- Work to identify the true causes – not just the symptoms
- Analyze the impact; especially on the critical path, but all paths as well
- Take corrective action, if needed, for both negative *and* positive variances

Customer Acceptance



- At the completion of the working project deliverables, the Project Manager will draft a Customer Acceptance document for the Project Sponsor's review and approval. By signing, the Sponsor agrees that:
 - All project deliverables have been completed per requirements as specified and agreed to in the Project Plan
 - All outstanding Issues are resolved or scheduled to be resolved to the customer's satisfaction
 - Any additional change requests will be treated as an additional scope of work under a new project arrangement with new costs

- Assuming all the conditions above have been met, the customer will "accept" the project. The stage is now set for Closing the project.

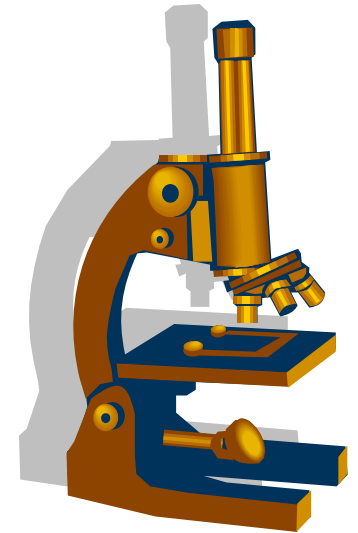
closing

the grand finale

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After-Action Review

- Put the project under a microscope
- Conduct a formal review meeting that includes the project sponsor and willing business stakeholders
- Should be a facilitated, well-planned event
- Discuss all major deliverables – how did each go?
- How were project communications? Did the sponsor obtain timely information that enhanced business decision-making capabilities?
- What did we do well?
- What did we do not so well and could do better?
- We should capture these “lessons learned” and publish so others can learn as well





Lab Project - Team Briefings



"Stand and Deliver"

project management fundamentals

END

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