PROJECT MANAGEMENT 101
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Project Management Institute: Founded in 1969
Project Management Professional: PMP
A project is a temporary endeavor, having a defined beginning and end, undertaken to meet unique goals and objectives, usually to bring about beneficial change or added value.
PM, DEFINED

Project Management: A systematic process used to initiate, plan, execute, control, and close a project to meet defined objectives.
SUCCESSFUL PROJECT

• Clearly defined goals and objectives
• A well-defined project management process
• A proven set of project management tools
• A clear understanding of the role of project management
Successful projects have a positive impact on communities.
Supported by the Ohio Mid-Eastern Governments Association
PM PHASES AND ACTIVITIES

Initiate  Plan  Execute  Monitor & Control  Close
What project management should look like
INITIATE

- Define preliminary project scope
- Develop project charter
- Plan resources
- Identify stakeholders
PLAN

• Define detailed project schedule and scope
• Estimate cost and risk
• Develop project management plan
• Secure resources
EXECUTE

• Conduct kick-off
• Perform project work
MONITOR & CONTROL

Manage:

• Scope
• Schedule
• Costs
• Risks

• Stakeholders
• Project team
CLOSE

• Perform administrative closure
• Release project resources
<table>
<thead>
<tr>
<th>Initiating</th>
<th>Planning</th>
<th>Executing</th>
<th>Monitoring &amp; Controlling</th>
<th>Closing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select project manager</td>
<td>Determine how you will do planning—part of management plans</td>
<td>Acquire final team</td>
<td>Measure against the performance measurement baselines</td>
<td>Develop closure procedures</td>
</tr>
<tr>
<td>Determine company culture and existing systems</td>
<td>Create project scope statement</td>
<td>Execute the PM plan</td>
<td>Complete product scope</td>
<td>Complete contract closure</td>
</tr>
<tr>
<td>Collect processes, procedures and historical information</td>
<td>Determine team</td>
<td>Recommend changes and corrective actions</td>
<td>Measure according to the management plans</td>
<td>Confirm work is done to requirements</td>
</tr>
<tr>
<td>Divide large projects into phases</td>
<td>Create WBS and WBS dictionary</td>
<td>Send and receive information</td>
<td>Determine variances and if they warrant corrective action or a change</td>
<td>Gain formal acceptance of the product</td>
</tr>
<tr>
<td>Identify stakeholders</td>
<td>Create activity list</td>
<td>Implement approved changes, defect repair, preventive and corrective actions</td>
<td>Scope verification</td>
<td>Final performance reporting</td>
</tr>
<tr>
<td>Document business need</td>
<td>Create network diagram</td>
<td>Continuous improvement</td>
<td>Configuration management</td>
<td>Index and archive records</td>
</tr>
<tr>
<td>Determine project objectives</td>
<td>Estimate resource requirements</td>
<td>Follow processes</td>
<td>Recommend changes, defect repair, preventive and corrective actions</td>
<td>Update lessons learned knowledge base</td>
</tr>
<tr>
<td>Document assumptions and constraints</td>
<td>Estimate time and cost</td>
<td>Give recognition and rewards</td>
<td>Integrated change control</td>
<td>Hand off completed product</td>
</tr>
<tr>
<td>Develop project charter</td>
<td>Determine critical path</td>
<td>Hold progress meetings</td>
<td>Approve changes, defect repair, preventive and corrective actions</td>
<td>Release resources</td>
</tr>
<tr>
<td>Develop preliminary project scope</td>
<td>Develop schedule</td>
<td>Use work authorization system</td>
<td>Risk audits</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Develop budget</td>
<td>Request seller responses</td>
<td>Manage reserve</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Determine quality standards, processes and metrics</td>
<td>Select sellers</td>
<td>Use issue logs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Determine roles and responsibilities</td>
<td></td>
<td>Facilitate conflict resolution</td>
<td></td>
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<tr>
<td></td>
<td>Determine communications requirements</td>
<td></td>
<td>Measure</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Risk identification, qualitative and quantitative risk analysis and response planning</td>
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</tbody>
</table>
PM... QUICK AND EASY

Initiating:
1) Identify Stakeholders
2) Document Business Need
3) Determine Project Objectives

Planning:
4) Create Project Scope Statement
5) Develop Schedule/Budget
6) Risk Management

Executing/Monitoring & Controlling:
7) Change Management

Closing:
8) Hand off Completed Product
INITIATING

1) Identify Stakeholders
Who will affect, or be affected by the project? Who has influence over the project?

2) Document Business Need
This is the justification for the project. Why is this project being done? What’s the goal or outcome of This Project? (SMARTER)

3) Determine Project Objectives
What specific product or outcome is wanted? What will be the end result of the project?
PROJECT DETAILS

• Charter
• Milestones
• Risks
• Team
• Communications Plan
PROJECT CHARTER

Project Name:
Project Manager:
Sponsor:
Customer:
Start:
Finish:
Known Critical Constraints: [ ] Time [ ] Money [ ] People

Reason for the Project: <why are we doing this>

Project Goal: <what’s the goal of the project; what’s the expected outcome>

What’s considered done?: <how will we know when we’re done>
<table>
<thead>
<tr>
<th>Milestones/Deliverables</th>
<th>Deliverable</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Risks</th>
<th>What could go wrong</th>
<th>Chances of it happening</th>
<th>Impact if it does happen</th>
<th>What should be done about it</th>
</tr>
</thead>
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</table>

<table>
<thead>
<tr>
<th>Who do you need to get it done?</th>
<th>Role</th>
<th>Name</th>
<th>When needed</th>
<th>For how long</th>
</tr>
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<tbody>
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</table>


## Stakeholder Analysis

<table>
<thead>
<tr>
<th>Name</th>
<th>Department / Company</th>
<th>Position</th>
<th>Advisers</th>
<th>Objectives, Requirements, &amp; Interests</th>
<th>Influence</th>
<th>Project Contribution</th>
<th>Resistance</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
1. What is the LIKELIHOOD an event will occur?

<table>
<thead>
<tr>
<th>Level</th>
<th>What is the Likelihood the Risk Event will occur?</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Remote</td>
</tr>
<tr>
<td>b</td>
<td>Unlikely</td>
</tr>
<tr>
<td>c</td>
<td>Likely</td>
</tr>
<tr>
<td>d</td>
<td>Highly Likely</td>
</tr>
<tr>
<td>e</td>
<td>Near Certainty</td>
</tr>
</tbody>
</table>

2. What is the IMPACT if the event occurs?

<table>
<thead>
<tr>
<th>Technical Performance</th>
<th>And/or</th>
<th>Schedule</th>
<th>And/or</th>
<th>Cost</th>
<th>And/or</th>
<th>Impact on Other teams</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Minimal or no impact</td>
<td>Minimal or no impact</td>
<td>Minimal or no impact</td>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b</td>
<td>Acceptable with some reduction in margin</td>
<td>Additional resources required; able to meet need dates</td>
<td>&lt;5%</td>
<td>Some impact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c</td>
<td>Acceptable with significant reduction in margin</td>
<td>Minor slip in key milestones; not able to meet all need dates</td>
<td>5-7%</td>
<td>Moderate impact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d</td>
<td>Acceptable; no remaining margin</td>
<td>Major slip in key milestone or critical path impacted</td>
<td>7-10%</td>
<td>Major impact</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>Unacceptable</td>
<td>Can’t achieve key team or major milestone</td>
<td>&gt;10%</td>
<td>Unacceptable</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

R - HIGH – Unacceptable. Major disruption likely; different approach required; priority management attention required.

Y - MODERATE – Some disruption; different approach may be required; additional management attention may be needed.

G - LOW – Minimum impact; minimum oversight needed to ensure risk remains low.
## COMMUNICATION PLAN

<table>
<thead>
<tr>
<th>Communication Type</th>
<th>Objective</th>
<th>Medium</th>
<th>Frequency</th>
<th>Audience</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kickoff meeting</td>
<td>Introduce project</td>
<td>Face-to-face</td>
<td>Once</td>
<td>Project sponsor, project team, stakeholders</td>
<td>Agenda, meeting minutes</td>
</tr>
<tr>
<td>Project team meetings</td>
<td>Review status</td>
<td>F2F, Conf call</td>
<td>Monthly</td>
<td>Project team</td>
<td>Agenda, meeting minutes</td>
</tr>
</tbody>
</table>
4) **Create Project Scope Statement**
Where does the project begin and where does it end?

5) **Develop Schedule/Budget**
How much time?
How many resources/how much money?

4) **Risk Management**
Identify and eliminate as many potential threats to the project as possible and then reduce the negative impact of the remaining threats.
CRITICAL TIP

If one side changes, they all change. The triangle is sacred. The triangle must remain equilateral.

Scope - Where does the project begin and where does it end?

Avoid Scope Creep: Uncontrolled changes that add new work or new features to an already approved project.

Schedule (Time) – How long will it take? What’s the deadline?

Budget (Cost) – How many resources/how much money?
For clients who want it all

Good

Expensive + Good

SLOW + GOOD

Fast

Low Quality

Cheap

Not Possible

Lauren Panepinto for Muddy Colors
SCHEDULING THE WORK

• Sequence the tasks
• Calculate start and end dates
• Review personnel resources
• Critical path
• Actual cost
<table>
<thead>
<tr>
<th>Week</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Research</td>
</tr>
<tr>
<td></td>
<td>Design</td>
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<tr>
<td></td>
<td>Layout</td>
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<tr>
<td></td>
<td>Developing</td>
</tr>
<tr>
<td></td>
<td>Upload</td>
</tr>
<tr>
<td></td>
<td>Finishing</td>
</tr>
</tbody>
</table>

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E, M, & C

7) Change Management

Some studies show that a change made during project execution will cost 100 times more than a change made during project planning.
CLOSING

8) Hand off Completed Project
• Tie up loose ends
• Ensure everything is finished
• Confirm you’ve met stakeholder expectations
• Report out with your successes
• Celebrate!
POSSIBLE PITFALLS

1. Undefined goals
2. Scope creep
3. Inadequate skills
4. Lack of accountability
5. Improper risk management
6. Ambiguous contingency plans
7. Poor communication
8. Impossible deadlines
9. Resource deprivation
10. Lack of stakeholder engagement
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