

Training

*by Design* Inc.  
Where God is the CEO

# EXECUTIVE PROJECT MANAGEMENT WORKSHOP FOR SMALL BUSINESSES



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# EXECUTIVE PROJECT MANAGEMENT WORKSHOP

## Course Overview & Objectives

- Executive Project Management Workshop Overview
- Conduct Project Management Self-Assessment
- Review Project Management Terminology
- Analyze Project Management Benefits
- A New Project Has Been Assigned – Now What
- The role of the project manager
- Identify The Phases of the Life Cycle Methodology
- Explain a work breakdown structure
- Explain Risk Management



# **TRAINING BY DESIGN, INCORPORATED**

## **FOUNDED – JUNE 2002**

**Dina Bell Nance / Chief Learning Officer & Global Trainer**

- B.S. in Computer Science, UMBC**
  - Completed Several Course Hours – M.S. In Marketing, UMUC**
  - Brings over 30 years of experience in the Project Management, Testing, Training and Customer Service Area's.**
  - Associate Pastor, Cornerstone Peaceful Bible Baptist Church**
- The Diverse Training Team members bring a wealth of knowledge and experience from a variety of disciplines to include Project Management, Education, Training, Software Testing and Documentation**
- For approximately 15 years, Training by Design, Inc. has provided Professional Development Training, Project Management Training and Technology Training Services to both the Public and Private Sectors. We also provide PM Consulting, Keynote Speaking and Motivational Speaking Services throughout the DMV.**

# PROJECT MANAGEMENT: TERMINOLOGY

## What is a Project ?



- A Project is an undertaking that has a beginning and an end.
- A Project requires a budget, separate from operating expenses.
- A Project meets an outlined goal or a set of requirements.
- A Projects time period is usually greater than 4 months.

Projects have the following traits: **Temporary, must have a goal, output is created only once, requires multi-disciplined team and needs a project manager to steer it through.**

# PROJECT MANAGEMENT: TERMINOLOGY

## Life Cycle Management or Methodology

Life Cycle Management (LCM) is an integrated concept to assist in businesses managing the total life cycle of products and services towards more sustainable consumption and production patterns.

## MS Project

The software application used to develop project plans for the project management methodology.

## Project Plan

A Project Plan is a document that outlines the tasks, resources, duration dates, resources and completion dates of your core projects.



# PROJECT MANAGEMENT: TERMINOLOGY



## What is Project Management?

In the 1960s, the concept of project management was developed to manage the **U.S. space program**. Its practice expanded rapidly into the government, the military and several other industry areas.

Today, project management is used in construction management, program management, and product management. Successful project management skills are needed to complete a project on time, within the budget and in accordance with the outlined goals.

Project management is about management of change. Changing the way things are done and clearly defining processes to manage the project.

## THROUGHOUT DIFFERENT COMPLIANCE REPORTS, GAO BREAKS DOWN PROJECT MANAGEMENT IN 3 DIFFERENT PORTIONS:

- Staff Members Understanding and Utilizing PM Foundational Concepts;
- Each Agency/Organization must employ a certain number of Project Management Professional's (PMPs) for a certain number of staff members;
- Each Agency/Organization Should Use a Certified Project Management Tool;

While MS Project is not mandatory, it is used highly by a large number of organizations throughout the U.S. to:

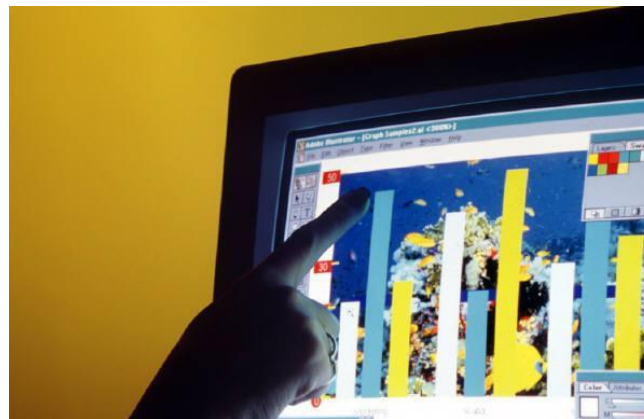
- Create Project Plans
- Utilize WBS Structures
- Enter Tasks Lists
- Create/Assign Resources
- Manage Task Durations
- Create Task Dependencies and Relationships
- Develop Stakeholder, Management & Team Reports
- Address & Resolve Over Allocated Resources



# PROJECT MANAGEMENT PROCESS

**Project management has the following traits:**

- Identify your objectives, goals and requirements
- Plan how you will get there and how will you measure progress against the plan
- Implement the plan, manage the project until the objectives are met and then turn it over





# PROJECT MANAGEMENT BENEFITS



**Better Efficiency in Delivering Services:** Project management provides a “roadmap” that is easily followed and leads to project completion. Once you know where to avoid the bumps and pots holes it stands to reason that you’re going to be working smarter and not harder and longer.

**Improved / Increased / Enhanced Customer Satisfaction:** Whenever you get a project done on time and under budget, the client walks away happy. And a happy client is one you’ll see again. Smart project management provides the tools that enable this client/manager relationship to continue.

**Enhanced Effectiveness in Delivering Services:** The same strategies that allowed you to successfully complete one project will serve you many times over.

**Improved Growth and Development Within your Team:** Positive results not only command respect but more often than not inspire your team to continue to look for ways to perform more efficiently.

**Greater Standing and Competitive Edge:** This is not only a good benefit of project management within the workplace but outside of it as well; word travels fast and there is nothing like superior performance to secure your place in the marketplace.



# PROJECT MANAGEMENT BENEFITS - CONTINUED

**Opportunities to Expand your Services:** A by-product of greater standing. Great performance leads to more opportunities to succeed.

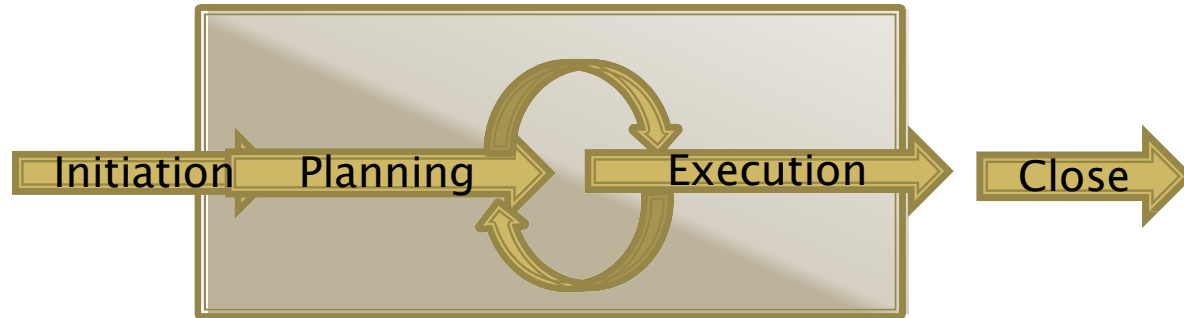
**Better Flexibility:** Perhaps one of the greatest benefits of project management is that it allows for flexibility. Sure project management allows you to map out the strategy you want to take see your project completed. But the beauty of such organization is that if you discover a smarter direction to take, you can take it. For many small-to-midsize companies, this alone is worth the price of admission.

**Increased Risk Assessment:** When all the players are lined up and your strategy is in place, potential risks will jump out and slap you in the face. And that's the way it should be. Project management provides a red flag at the right time: before you start working on project completion.

**Increase in Quality:** Goes hand-in-hand with enhanced effectiveness



# PROJECT MANAGEMENT PMI – LIFE CYCLE



## **Initiating**

- Set the project goals, identify project start/finish dates, identify PM and project budget

## **Planning**

- Enter project tasks, durations and relationships, identify subdivisions and milestones, document available resources and enter task restrictions

## **Executing**

- Produce work results, including the products or services to meet the goals, request changes to the project, recommend quality and performance improvements and create project records, reports and presentations

## **Controlling**

- Update project start, finish and resource usage to complete or partially complete tasks, manage resource and tasks conflicts, work with project to meet management timing, resource and cost objectives

## **Closing**

- Enter the final status of the finished project, including task date, resource and cost information and print final Reports

# COMPONENTS OF A SUCCESSFUL PROJECT PLAN



## **Planning Phase**

Tasks

Duration Dates (Start/Finish Dates)

Resources

Documentation /Communication Efforts

Reporting Items

## **Requirements Phase**

Same as Above

## **Design/Development Phase**

Same as Above

## **Testing Phase**

Same as Above

## **Implementation Phase**

Same as Above

## **Maintenance Phase**

Same as Above

# A NEW PROJECT HAS BEEN ASSIGNED – NOW WHAT?

## Project Management Questions

- What is the vision of the New Project?
- Who is assigned to the New Project besides myself?
- What role do you want me to play in this project?
- What is the official Start Date for this project?
- When would you like for the Project to end?



NEW YEAR,  
NEW PROJECTS

# INTRODUCTION TO PROJECT MANAGEMENT

There are **nine project management knowledge areas** that are integrated across the five process groups:

## **Integrated Management**

Managing the project across the life cycle.

## **Scope**

Clearly define what the project will and will not encompass. What is the expected outcome and final product?

## **Time Management**

Time required to see this project through to completion.

## **Cost Management**

Cost, equipment, materials, labor or staffing needs, financing, or real estate.

## **Quality Management**

Is there a need as outlined by the organization or the clients for the outcomes to meet certain standards?



# INTRODUCTION TO PROJECT MANAGEMENT – CONTINUED

## **Human Resource Management**

Who will be involved? Why those individuals? Is there a need on the project for special skills/needs or qualifications? How will they be motivated?

## **Communications Management**

Who needs to be told of project progress? Why must they be told? What should they be told? How or what medium will be used to communicate?

## **Risk Management**

How much risk is associated with the project? How many can be risked? Who decides the level of risk?

## **Procurement Management**

Are there contracts? With whom? Are they third party (outside customer and suppliers, such as subcontractors)? Is there a requirement for training and development?



# WHY PROJECTS FAIL

## Why Projects Go Wrong?

The most commonly quoted number of project failures is around half. Only around one quarter of projects are completed successfully, within time, cost, and scope.



The major factors contributing to project failure are:

- Unrealistic estimates
- Unclear objectives
- Poor communication
- Changing objectives (scope creep)
- Lack of management support
- Poor leadership (Stakeholders must accept)
- Poorly define responsibilities
- Lack of resources



# INTRODUCTION TO PROJECT MANAGEMENT

## Goals and Objectives

Project goals should provide the criteria you need to evaluate your success in completing the project. Goals define the accomplishments or desired outcomes.



Objectives are how you intend to accomplish the goal. Objectives include measure of time, cost, and resources to achieve the desired outcomes.

## Milestone

A milestone is the end of a phase and the time for stakeholders to evaluate the project's progress, changes, and decide whether to continue or discontinue working on the project.

# PROJECT MANAGEMENT DELIVERABLES

## Deliverables

A deliverable is an output from a project, product, result, or capability to perform service that must be produced to complete a process or project. The deliverable must be fit for use, customer must be able to use it.

Deliverables from each phase are used to manage the next phase of the project.



# THE PROJECT MANAGEMENT TEAM

## Project Team

There are typically seven key players in a project, although the roles may overlap.

When you are staffing a project team, consider the following criteria:

- Required personnel-First, determine the project's personnel requirements. Determine the types of skills you need and the number of people required for each skill type.
- Source of personnel-Decide whether the team members will come from within the organization or from outside sources.
- Organizational structure-Determine the most appropriate organizational structure. In a matrix organizational structure, employees who are part of a project team continue to report to their functional manager. However, if you use a project organizational structure, team members will report to the project management.



# THE PROJECT MANAGEMENT TEAM

## “THE SPONSOR”

### The Sponsor

This person is the most senior team member. They typically initiate funding and provide the authority within the organization.

Their responsibilities can include:

- Representing the interests of the organization, ensuring goals, objectives, and the project itself benefits the company as a whole
- Providing resources
- Create the Statement of Work(SOW) or Project Charter
- Making the team aware of constraints. Constraints are factors that may interfere with things getting done on time, such as other projects, construction, labor disputes, budgets, etc.
- Helping to inspire and motivate the team



# THE PROJECT MANAGEMENT TEAM

## “THE PROJECT MANAGER”

### The Project Manager

The project manager is the team leader who takes charge of the project and ensures the goals and objectives are achieved. Project manager’s role , including:

- Plan the project
- Oversee the execution of the project plan
- Organize resources
- Keeping an eye on the big picture to ensure the progress is on track
- Motivating the project team and helping them grow.
- Communicating with sponsors, stakeholders, and team members to ensure everyone is on the same page.
- Acting as representative for the customers of the project.



# THE PROJECT MANAGEMENT TEAM “STAKEHOLDERS”

## Stakeholders



Stakeholders are individuals who have a stake in the success of the project. They are affected by the outcome of the project, or they may simply have an interest in the project. This person or person(s) are often only involved at particular stages. Their main responsibilities include providing feedback and guidance.

# THE PROJECT MANAGEMENT TEAM

## “TEAM MEMBERS OR SME’S”

### Key Team Member

Key team members are experts in a particular area. They typically assist the project manager directly, contributing their expertise when necessary.

Their responsibilities include:

- Helping to determine whether or not the project is feasible
- Helping to plan the project
- Ensuring that the project comes in on time and on budget



# THE PROJECT MANAGEMENT TEAM “TEAM MEMBERS”

## Team Member

These people are the worker bees of the team. Typically, each member focuses on a few tasks (or perhaps just even one task), as assigned by the project manager. They may also act in a consulting capacity if specialized expertise is needed.

Their major responsibilities include completing the task(s) as laid out in the project plan.





# THE PROJECT MANAGEMENT TEAM “CUSTOMERS”

## Customers



Customers are also a part of your project plan too. These are the people internal or external to your company who are affected by the project.

Although the customer may not have a direct role on the project team, the customer should influence some decisions made by the project manager, including the objectives, how success is measured and the direction for the project.

# THE PROJECT MANAGEMENT TEAM

## “SUPPLIERS”

### Suppliers

Suppliers are the people who provide the resources for your project. These resources can include services, materials or products. These people are crucial to the success of the project. Their sole responsibility is to work with the project manager to deliver the promised items or services on the time and at the agreed cost.

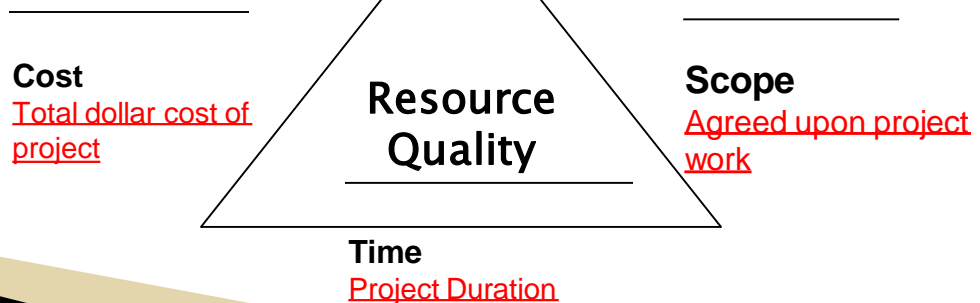


# MEASURING PROJECT SUCCESS

## Measure Project Success

A successful managed project is one that is completed at the specified level of quality on or before the deadline and within budget.

There is measurement for project success during the planning phase of the project. These measurements form the basis for control the project during the execution phase. These measurements are often called **Project Management Triangle** or **Triple Constraints**.



# Unit 1: Introduction to Project Management

## Activity 1



What is the role that the project manager plays in managing the project? Discuss with partner.

What is the role that the project manager plays in dealing with the sponsor? Discuss with partner.

What do you consider to be the most five important skills a project manager needs? Discuss with partner.

# Introduction to Project Management Review



## Conclusion

Please take a moment and summarize what you have learned in the Executive Project Management Session.

How will you apply what you have learned to your current or future project?