Los Angeles County Management Council
Department of Human Resources

Topic: Project Management – Getting Done What Books Don’t Teach You

Fundamentals of Project Management Life Cycle
“Personalizing the Project Manager Experience”
• Recognize project management terminology.
• Identify the benefits of project management.
• Define the roles and responsibilities of the various stakeholders and key players.
  • **Emphasize the use of stories** as a means for thinking about, communicating strategies, and implementing project work.
  • **Bring in an interesting and coherent message** for the project management community: using your day-to-day knowledge and skills to improve your chances at project success.
• **Provide personal experiences and examples** to enhance the project manager’s approach to project work.
• Recognize the importance of managing project communications.
Definition of a Project

“A project is a temporary endeavor undertaken to create a unique product, service, or result. The temporary nature of projects indicates that a project has a definite beginning and end.”

- *PMBOK Guide (Fifth Edition) 2013*
Projects – What are they?

- Undertaken at all levels
- Can be a single person, hundreds or thousands
- Duration can be days, weeks or years
- Can be conducted by a single unit or entire organizations
- Projects are unique
- Projects consume time
- Cost money
- Require personnel
- Contain different levels of risk
- Entails a sequence of tasks
What is Project Management

“Project management is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements. Project management is accomplished through the appropriate application and integration of logically grouped project management processes.”

- PMBOK Guide (Fifth Edition) 2013
Project Management Overview

Initiate | Plan | Execute | Monitor & Control | Close

Project Management Overview

Initiate → Plan → Execute → Monitor & Control → Close

J.P. JotaP
Juan Pedro
Jon Jon
J.B.

J.B.
J.D.
P.J.

Juan
Juan
Juan
Pierre
J.D.

John-Pierre
Yipi
Jean-Pierre

Jon Pere
Juan-Pierre

Yeipi
Pin

Iipi
Jon Piere
## Presentation Overview

<table>
<thead>
<tr>
<th>Presentation Overview</th>
<th>Initiate</th>
<th>Plan</th>
<th>Execute</th>
<th>Monitor &amp; Control</th>
<th>Close</th>
</tr>
</thead>
</table>

## Project Management “Keywords”

<table>
<thead>
<tr>
<th>Plan</th>
<th>Competency</th>
<th>Success</th>
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</thead>
<tbody>
<tr>
<td>Communication</td>
<td>Consistency</td>
<td>Quality</td>
</tr>
<tr>
<td>Risk</td>
<td>Integrity</td>
<td>Framework</td>
</tr>
<tr>
<td>Teamwork</td>
<td>Customer Orientation</td>
<td>Structure</td>
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<tr>
<td>Collaboration</td>
<td>Delegation</td>
<td>Partners</td>
</tr>
<tr>
<td>Tactical</td>
<td>Prioritize</td>
<td>Tracking</td>
</tr>
<tr>
<td>Strategic</td>
<td>Proactive</td>
<td>Scope</td>
</tr>
<tr>
<td>Stakeholder</td>
<td>Time Management</td>
<td>Meeting</td>
</tr>
<tr>
<td>Metrics</td>
<td>Project</td>
<td>KPIs</td>
</tr>
<tr>
<td>Process</td>
<td>Management</td>
<td>Report</td>
</tr>
<tr>
<td>Planning</td>
<td>Control</td>
<td>Costs</td>
</tr>
</tbody>
</table>
Why Do Projects Fail?

Brooks’s Law

• In software project management: “Adding manpower to a late software project makes it later.”

• How does a project get to be three years late? “One Day at a Time”

- (Fred Brooks – The Mythical Man-Month (1975))
**Most Common Causes of Project Failure:**

- Changing priorities within organization – 40%
- Inaccurate requirements – 38%
- Change in project objectives – 35%
- Undefined risks/opportunities – 30%
- Poor communication – 30%
- Undefined project goals – 30%
- Inadequate sponsor support – 29%
- Inadequate cost estimates – 29%
- Inaccurate task time estimate – 27%
- Resource dependency – 25%
- Poor change management – 25%
- Inadequate resource forecasting – 23%
- Inexperienced project manager – 20%
- Limited resources – 20%
- Procrastination within team – 13%

*Source: Project Management Institute: Pulse of the Profession 2015: Capturing the Value of Project Management 2015*
Project Failure – Statistics Review

Project Failures

- Only 47% say their teams achieve 70-89% of their goals. Nearly 20% say they only achieve 50-69% of their goals.

- 80% of teams say they spend at least half their time reworking completed tasks.

- Only 64% of projects meet their goals.

- 70% of companies report having at least one failed project in the last year.

- Only one-third of companies always prepare a business case for new projects.

Project Failure – Statistics Review

Top Contributors to Large IT Project Failure

• Unclear objectives/lack of business focus
• Unrealistic schedule/reactive planning
• Shifting requirements/technical complexity
• Unaligned team/missing skills

Project Failure – Statistics Review

What the Customer Ordered

What the Customer Received
We Need to Distinguish....

Project Life Cycle

• What to do to get the work done

Project Management Process

• What to do to manage the project
Project Management Cycle

Initiate → Plan → Execute → Monitor & Control → Close

Project Life Cycle vs. Project Management Process

- Project Management Cycle
  - Initiate: Authorize the Work
  - Plan: Plan the Work
  - Execute: Work the Plan
  - Close: End the Work

- Project Life Cycle
  - Initiate: Project Initiation
  - Plan: Project Planning
  - Execute: Project Execution
  - Close: Project Closure

- Monitor & Control
  - Detailed Planning
  - Monitoring & Control
  - Project Review
  - Project Definition
Project Management Cycle

Process Groups

Activities

Initiate
- Authorize the Work

Plan
- Plan the Work

Execute
- Work the Plan

Close
- End The Work

Key Outputs

Initiate
- Define New Project and Obtain Authorization
  - Project Charter
  - Stakeholder Register

Plan
- Develop project management plan
  - Project Management Plan
    - Scope
    - Requirements
    - Schedule
    - Cost
    - Quality
    - HR
    - Communication
    - Risk
    - Procurement
    - Change
    - Stakeholders

Execute
- Complete the work to satisfy project objectives
  - Project Deliverables
  - Work Performance Data
  - Team Performance Assessments
  - Project Communications
  - Selected Suppliers & Agreements
  - Change Requests
  - Issue Log

Close
- Finalize all activities and close project
  - Final Product
  - Project Completion
  - Review

Monitor & Control

Activities
- Track and review project progress / performance and Manage variance / change

Key Outputs
- Change Logs; Approve Change Requests; Schedule Forecasts; Updates to Project Plan; QC; Verified Deliverables; Accepted Deliverables
Everyone has a plan ‘till they get punched in the mouth.

- Mike Tyson (former heavyweight boxing champion)
Project Management is “People Management”
Project Management is “People Management”

Managing

- Control, dominate, influence, handle, govern.
- Succeed in the face of challenges.
- Take charge and make decisions.

Managing Well

- Managing well adds value, expectations, accountability, Clarity.
- Involves questioning your beliefs and attitudes, recognizing how they affect your performance.
Stakeholder Identification

Stakeholders

• Are individuals or organizations that are actively involved in the project or whose interests may be positively or negatively affected as a result of the project

• May exert influence over the project and its results
Stakeholder Identification

Stakeholder Grid

- Keep Satisfied
- Manage Closely
- Monitor
- Keep Informed
Stakeholder Identification

Salience Model

1. Dormant Stakeholder
2. Discretionary Stakeholder
3. Demanding Stakeholder
4. Dominant Stakeholder
5. Dangerous Stakeholder
6. Dependent Stakeholder
7. Definitive Stakeholder
8. Non-Stakeholder
Project Sponsor

- Ensures the project meets the business needs
- Provides funding
- Approves key deliverables
- Assists in issues resolution and change management
Project Manager

- Assembles the project team
- Assigns tasks and activities
- Monitors progress, risk and issues
- Manages the scope
- Delivers on time and within budget
- Ensures project documentation is prepared
Project Manager is the “Project Quarterback”

Skills
- Creativity
- Innovation
- Strategy
- Attitude
- Experience
- Leadership

Risks
- Blind Side Challenge
- Sacks (unforeseen)
- Fumbles
- Missed Pass
Stakeholder Identification

• **Project Manager as the “Baseball Catcher”**

  How does it feel to be a PM? - What to look out for:

  - Fastball
    - Four-seam
    - Two-seam
    - Cut fastball
    - Split-finger
  - Curveball
  - Screwball
  - Changeup / Palmball

**Be proactive and more flexible**

• Consider using an agile project management style for smaller, faster-moving projects.
• Use time as a contingency buffer.
• Implement the risky features first.
• If you can, keep the dates, change the scope.
Project Leader

- Responsible for a subproject
- Ensures technical aspects are delivered
- Monitors progress, risk and issues
- Manages the scope and the change management process
- Delivers on time and within budget
- Communicates status to project manager
Subject Matter Experts (SMEs)

Never Underestimate the “Power of SMEs” – Ask an Expert!

- Complete assigned tasks on time
- Work with other team members
- Monitors progress on their tasks
- Resolve issues
- Monitor changes and risks
- Advise others of potential problems
**Subject Matter Experts (SMEs)**

*Never Underestimate the “Power of SMEs” — Ask an Expert!*

<table>
<thead>
<tr>
<th>Activity</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advise project manager on technology strategy</td>
<td>Offer technical advice and recommend strategy</td>
</tr>
<tr>
<td>Review current architecture</td>
<td>Review and document findings</td>
</tr>
<tr>
<td>Plan and motivate for technology</td>
<td>Offer technology support and motivations</td>
</tr>
<tr>
<td>Build and assemble technical solution</td>
<td>Build and present the feasibility of the solution</td>
</tr>
<tr>
<td>Test the technical solution</td>
<td>Prepare test cases and scenarios and perform testing of the technical solution</td>
</tr>
</tbody>
</table>
Project Team Members

- Complete assigned tasks on time
- Work with other team members
- Monitors progress on their tasks
- Resolve issues
- Monitor changes and risks
- Advise others of potential problems
The Project Manager must be:

**Be Proactive rather than Reactive**

**Be more flexible**

- Consider using an agile project management style for smaller, faster-moving projects.
- Use time as a contingency buffer.
- Implement the risky features first.
- If you can, keep the dates, change the scope.
- Project manager should look out for the overall well-being of his team.

**Communicate clearly all commitment dates**

- Use a scheduling tool that supports ranged estimates.
- Use data to predict finish dates with probability.
- Show management how the project captures uncertainty and plans for changes.
Managing Project Expectations

The “complete “Project Manager must plan ahead:

Good habits: Focus on Discipline, Attention to Details.

- Take Good notes – review your work on a daily basis.
Managing Project Expectations

The “complete “Project Manager must plan ahead:

Good habits: Use spreadsheets, MS Project, SharePoint
Managing Project – Techniques

Project Kickoff Meeting

• First impression is everything – “Just like going on a first date”

• Take advantage of this one-time chance to energize the group.

• Get the entire team on the same page.

• Set proper expectations, and establish guidelines that will help you complete the project on time and within budget.
Agile – Simplified...

- Agile is a set of techniques that relies on transparency, simplicity and iterative development.

- Agile seeks to keep pace with change, rather than predict, control or prevent it.

- Promotes teamwork, self-organization and accountability.

- **Stories** are units of scope that are small and can be implemented without another one. They stand alone. They can be grouped into larger bundles called **epics**

- **Agile – Independent, Negotiable, Valuable, Small, Testable, Understandable. Must be able to estimate work effort.**
Scrum is:
  Lightweight
  Simple to Understand
  Difficult to Master

Abilla, J.P, 3/28/2017
Scrum Framework – Simplified...

- Scrum is a management and control process that aims to cut through complexity to focus on building software that meets business needs.

- Scrum itself is a simple framework for effective team collaboration on complex software projects.
• Teams are self-directed and self-organizing;
• Tasks (mini-projects) are taken from a “release backlog” that is always evolving under the direction of the project owners.
• Each sub-project is begun and completed in pre-defined time increments, typically two to four weeks, or in Scrum terminology, “sprints”.
• Each of those sprints begins with adaptive planning.
• Teams meet daily for a 15-minute stand-up meeting to discuss team-related issues.
• Team progress is updated daily, and displayed using a Sprint burndown chart.
• Stakeholders are invited to a demo at the end of each sprint.
• Each sprint delivers tested, fully-functional software, which leads to continuous improvement. Bugs are fixed within each sprint, not at the end of the project;
• Each sprint is fully tested and never more than 30 days from potential release to the customer; and
• Sprints are developed within a sustainable pace, usually within 40-hour work week.
Managing Project – Techniques

Team Meetings

- Organize and schedule meetings as needed: don’t wait until next week’s meeting if you have important project information to share with the team.

- Change the monotony of meetings:
  - Consider changing the meeting venue, for example: meet at a local park, or at the nearest coffee shop.
  - Ask team members to contribute by suggesting or picking the different location.
SWOT Analysis

- SWOT Analysis is a technique that is used to examine the project from each of the **Strengths**, **Weaknesses**, **Opportunities** and **Threats** (SWOT).

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service</td>
<td>Communication</td>
</tr>
<tr>
<td>Information Technology</td>
<td>Resource Limitations</td>
</tr>
<tr>
<td>Planning</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standardization</td>
<td>Insufficient Bench Strength</td>
</tr>
<tr>
<td>More Knowledgeable Staff</td>
<td></td>
</tr>
</tbody>
</table>
Project Schedule

Project Schedule Techniques

Project managers adjust their schedules by delaying or rescheduling tasks, allocating an alternate resource, modifying the task dependencies or eliminating redundant or unnecessary tasks that add no value to the customer.

Schedule Compression

Used when we want to shorten the duration of a project without changing the scope of the project. (Example: when a project falls behind or you want to finish the project sooner that what was originally scheduled).

- **Fast Tracking** – Activities are performed in parallel (low cost)

- **Crashing** – Adding resources to the project (high cost)
  
  Brooks’ Law - “Adding manpower to a late software project makes it later.”
Gantt Chart

- A Gantt Chart is a type of chart, used as a tool to show activities, like tasks or events, as part of a schedule.
Execution / Monitor & Control

PERT Chart (Program Evaluation Review Technique)

• A Gantt Chart is a type of chart that presents a graphic illustration of a project as a network diagram, consisting of numbered nodes that represent events or milestones in a project.
### Project Status Report

<table>
<thead>
<tr>
<th>Project Type</th>
<th>Task</th>
<th>UNIT</th>
<th>Estimated Start</th>
<th>Estimated Finish</th>
<th>Duration (in Days)</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify Conference Room Schedule</td>
<td>Research</td>
<td>PPM</td>
<td>8-Feb-2017</td>
<td>9-Feb-2017</td>
<td>1</td>
<td>Complete</td>
</tr>
<tr>
<td>Reserve Board Room for Project work</td>
<td>Calendar / Schedule</td>
<td>PPM</td>
<td>14-Feb-2017</td>
<td>15-Feb-2017</td>
<td>1</td>
<td>Complete</td>
</tr>
<tr>
<td>Preliminary requirements Meeting</td>
<td>Meeting to decide system capabilities</td>
<td>PPM</td>
<td>25-Jan-2017</td>
<td>27-Jan-2017</td>
<td>2</td>
<td>Complete</td>
</tr>
<tr>
<td>Vendor Consideration &amp; Evaluation</td>
<td>Research/Metings</td>
<td>PPM</td>
<td>25-Jan-2017</td>
<td>10-Feb-2017</td>
<td>15</td>
<td>Complete</td>
</tr>
<tr>
<td>Vendor Contact</td>
<td>Reach out to AV Contractors/Integrators</td>
<td>PPM</td>
<td>25-Jan-2017</td>
<td>6-Feb-2017</td>
<td>11</td>
<td>Complete</td>
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<tr>
<td>Vendor Conference Call Evaluation</td>
<td>Individual Calls to vendors</td>
<td>PPM</td>
<td>2-Feb-2017</td>
<td>2-Feb-2017</td>
<td>0</td>
<td>Complete</td>
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<td>Setup Vendor visit</td>
<td>Meeting to decide system capabilities</td>
<td>PPM</td>
<td>19-Feb-2017</td>
<td>19-Feb-2017</td>
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<td>Follow-up Vendor - Follow-up to visit</td>
<td>Individual Calls to vendors</td>
<td>PPM</td>
<td>16-Feb-2017</td>
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<td>Follow-up Vendor</td>
<td>Meeting to decide system capabilities</td>
<td>PPM</td>
<td>27-Feb-2017</td>
<td>28-Feb-2017</td>
<td>1</td>
<td>Complete</td>
</tr>
</tbody>
</table>
# Project Status Report

**Project Name:** Commissions Website Enhancements  
**Project Manager:** J.P. Abilla  
**Reporting Period:** 10-01-16 to 10-14-16  
**Today’s Date:** 10-14-16

### Status Summary

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope</td>
<td></td>
</tr>
</tbody>
</table>
1. Has the scope changed or is it about to be impacted?  
2. Have the deliverables/objectives changed?  
3. Is the quality of the deliverables being affected?  

| Times |  |
4. Is a deliverable milestone about to be missed?  
5. Has the estimated schedule changed?  
6. Are there any other major issues or new visions?  

| Cost |  |
7. Have the estimated costs (i.e., out of pocket) changed?  
8. Are there productivity problems affecting the team's ability to perform the work?  
9. Is there a problem with resources?  

**Explanation of “Yes” items:** (For every question answered “yes”, give a brief explanation.)

<table>
<thead>
<tr>
<th>Deliverable / Milestone</th>
<th>Completion Dates</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Estimated</td>
<td>Revised</td>
</tr>
</tbody>
</table>
Manage Communications

“The process of creating, collecting, distributing, storing, retrieving and disposing of project information in accordance with the communications management plan”

Issues

• We all have issues. Share those that affect the project directly or indirectly.

• Update Issues Log – resolution dates and assigned resource.

Meetings

• Plan your meeting. Consider what you really need to accomplish.

• If some team members do not need to be part of the meeting, place them “on-call”. Never “waste” resources.
Stop By...

• Make you interact with your team members from time-to-time.

• Stop by your team members desk to say “hi”, have a chat and ask how things are going. This will provide a 1:1 opportunity for them to bring up any questions.

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• Stop by your team members desk to say “hi”, have a chat and ask how things are going. This will provide a 1:1 opportunity for them to bring up any questions.
Manage Communications

Project Manager must keep in mind...

Virtual Teams

- Concept “Slow Down to Speed Up”
  - This is a practice to take time to set expectations, for the teams to synchronize and focus. Teams need to understand each other’s processes in order to interact efficiently.

- Avoid "Out of sight and out of mind"
  - This is a natural human behavior – PM’s challenge is to be visible and present.

- Practice “Effective Listening”
  - Resort to Coaching and Counseling (Reflecting and Probing)
  - Avoid Deflecting and Advising
Quality of Communication

Example – Managing External Vendors:

“They no longer trust you because you insist on telling him the truth about the project”

- As trust increases, they will be more open and honest
- Fear of retribution diminishes as parties that trust each other
- Frequent and Clear Communication is necessary

Reinforcing Loop technique:

- When reinforcing loops are working well, projects will get better and better
- **Drawback:** if a variable starts to degrade, the rest fall follow suit.
Manage Communications

**Trust in internal contact by 3rd party**

**Example:** Reinforcing Loop technique

- Open and Honest Communication

- **Trust in 3rd party by internal contact**

- Performance

Steps:
- Initiate
- Plan
- Execute
- Monitor & Control
- Close

Communications
Presentations and Meeting Tips

- Make a connection with the audience.
  - Take into account: culture, interest, background, topic.
- Clearly explain the purpose and objective of your meeting.
- Address the problem or opportunity at hand.
- Explain the benefits of the proposal.
- Cover project drawbacks, risks, costs (overall).
- Expectations for the short and long term.
- Understand scope and length of the presentation.
Monitor and Control Communications throughout the project

• Using the correct communication media -
  • Example: know when to use email, 1:1 meeting.

• Make erroneous assumptions about your audience -
  • Example: assume that everyone knows what you know.

• Withholding information -
  • Example: team members withholding performance issues or neglect to share challenges they encounter.
  • Example: when a sponsor knows a reorganization is coming and may impact your project, blocking the flow of communication.
Project Review - Closure

Reviewing the Project (Post-Project Review Approaches):

Meetings (Small Groups or 1:1)

Questions

• What did you learn about the project management?
• If you had a chance to do this project again, what would you do differently?
• What same steps you would take all over again?
• What lessons did you learn?

To improve Quality of Feedback, use Open-Ended Questions

• How accurate was scheduling and what could have been improved?
• Upon completion, did the project output meet customer specifications?
• How close to budget was the final project cost?
• If additional work was required, please describe.
• What techniques were developed that will be useful on another project?
Project Review - Closure

Reviewing the Project (Post-Project Review Approaches):

Project Team

• Engage in Team-building activities. Celebrate project success with the team.

---

Project Closure Report

- Project Name:
- Project Lead:
- Project ID:
- Closure Date:

1. PROJECT CLOSURE - SYNOPSIS
   - Summary of Performance and Outcomes (Required)
   - The objective of the Project was...
   - Work completed:
     1. Milestones
   - Project documents may be found at

2. SCOPE MANAGEMENT
   - Unplanned Changes to Project Scope (Optional or “NA”) 
     N/A

3. LESSONS LEARNED
   - Summary of Lessons Learned or Best Practices (Optional, “NA” or Separate Activity)
   - Lessons learned highlights

4. ADDITIONAL COMMENTS AND NOTES
   - Other Project Highlights or Notes (Optional)
   - Considerations:
     • We discovered
Metrics, KPIs and Dashboards

Metrics

• “The Need for Value Metrics” – it is essential to create metrics that focus not only on (internal) business performance, but also on performance towards customer (external) satisfaction.

KPIs (Performance Key Indicators)

• A KPI is a metric measuring how well an organization, unit or individual performs an operational, tactical or strategic activity that is critical to the current and future success of the organization.

• The ultimate purpose of a KPI are the measurement of items directly relevant to performance, and the provision of information on controllable factors appropriate for decision-making that will lead to positive outcomes.
Metrics, KPIs and Dashboards

Dashboards

- Designed to convey the most critical information to stakeholders the fastest way.
- Dashboard design should take into account effective communication.
- Information visualization is “a science, not an art.”

Caution: Dashboards are not designed to be “bells and whistles”
Project Review – Q&A

Thank you!!!