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The Project Management Workshop

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1 The Project Management Model– Definition

The Basics of Project Management

What Is a Project?

A one time, multi-task job that has clearly defined starting and ending dates, a specific scope of work to be performed, a budget, and a specified level of performance achievement.

Project Management Is Using a Set of Tools to:

- Create a work plan
- Manage work
- Anticipate and solve problems
- Allocate resources
- Implement the plan

Do You Have a Project to Manage?

Projects must have multiple tasks. Which of the following is a project?

- Doing your taxes
- Developing a business plan
- Writing a book
- Planning a wedding
- Designing a new product

Notes:

1 The Project Management Model – Definition

Let's Define Success

There are many variables that contribute to project success. Use the following six-step model to ensure your project meets your expectations.

Components of a Successful Project

1. The organizational structure is suited to the project and the team.
   - The project has senior level support and resources have been allocated to the project.

2. The project team participates in planning.
   - Team involvement is critical from the beginning.

3. The project manager is committed to established schedules and budgets.
   - The project schedule may not be comfortable, but it is doable both on time and within budget.

4. The project makes proper use of network planning techniques—and doesn't let the plan become an end in itself.
   - Planning is an important part of project management, serving as a blueprint for getting tasks completed.

5. The project manager works with bureaucracy and office politics, not against them.
   - Savvy project managers know how to communicate to get the job done.

6. The project manager, management team, and customer agree on specific, realistic, project goals.
   - The project goals are established and agreed upon during the planning phase of the project.

Notes:

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1 The Project Management Model Definition

Become a Successful Project Manager

Today's successful project managers work hard to combine great technical skills with top notch people skills. The top five key traits of successful project managers possess are:

Determine Your Own Personal Strengths and Weaknesses

How do you measure up? How we perceive ourselves is often very different from how others perceive us.

1. I actively work to provide an open and honest atmosphere within the team.
   ○ True ○ False
2. My communication style is open, direct and professional.
   ○ True ○ False
3. I try to identify shared points of view as a basis for negotiation.
   ○ True ○ False
4. When solving problems, I act as a guide, allowing the team members to use their problem solving skills to come to a resolution.
   ○ True ○ False
5. I am well known as a project manager, representing my team's and the project's best interests as appropriate.
   ○ True ○ False

The Functional Manager vs. the Project Manager

Full-time project managers play a different role in the organization from traditional functional managers. There are benefits and drawbacks to each role.

Functional Managers	Project Managers
Specialists	Generalists
Direct supervisors	Coordinate a team of specialists
Have basic technical knowledge	May have detailed technical knowledge in one or two areas
Have line control over staff	Dotted line authority

Functional Manager

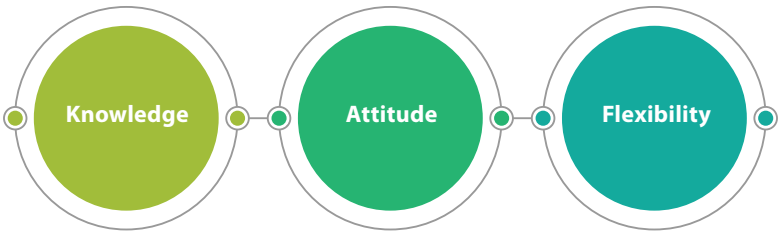
Benefits:

Drawbacks:

Project Manager

Benefits:

Drawbacks:



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1 The Project Management Model – Definition

Who Should Be Involved In the Project?

Identify the specific people you should involve in setting objectives, and assure the project receives the necessary support and resources.

1. Stakeholders
2. Project Manager
3. Project Team
4. Project Sponsor
5. Customer

How Do They Define Project Success?

Stakeholders • • •	**Project Manager** • • •
Project Team • • •	**Project Sponsor** • • •
Customer • • •	

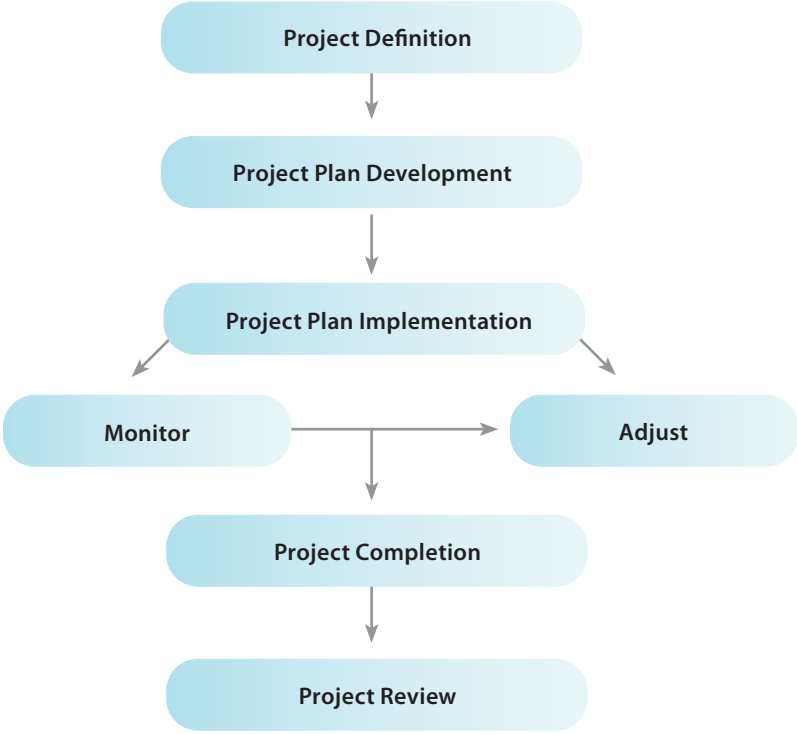
The Bottom Line – Successful project managers know how their customers, stakeholders, project team and project sponsors define success. Fundamental expectations of the project manager are that:

- They will provide a usable product or service
- They will serve the customer professionally
- They will learn about the customers needs and address them effectively
- They will complete the project on time and within budget

1 The Project Management Model – Definition

The Project Life Cycle

The project life cycle is the overall process used to manage and complete a project. Each stage of the life cycle should be defined in a formal project plan.



- Should the project continue to the next phase?
- What, if anything, should be done differently in the next phase?

Successful project managers understand the value of getting feedback when reviewing their project. Often, outside experts are consulted with throughout the project to provide unbiased and objective recommendations to make the project more successful.

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Clear Project Definition and Scoping Is Critical

Often, managers are assigned a project with little project information. This sets both the manager and the project up for failure. Take time to clarify the project definition and scope so you can ensure all customer requirements are understood.

Project Definition and Scope

- Provides clear statement of the project
- Defines the focus by identifying deliverables and deadlines
- Helps establish the project requirements
- Provides project boundaries and how changes will be approved or denied

Perform a Needs Analysis With Your Customers to Help Define the Project and Scope

Ask your customers the following questions:

- What is the primary objective of the project? Are there other objectives to be met?
- Is the project aligned with organizational goals?
- What are the desired deliverables?
- What technical issues are involved?
- What is the desired schedule?
- What problems may the project team face?
- What assumptions are made as it relates to the project?
- What weaknesses do we have and can we minimize the impact?

Once you have answers to these questions, create a project charter and scope document to clarify and formalize the understanding of project deliverables for all associated with the project.

1 The Project Management Model – Definition

Managing a Balanced Project

Projects, like almost any other business endeavor, are a balancing act. Your job as a project manager is to define the project and identify how best to manage project resources.

Determine your project constraints by evaluating the availability of your four main resources: Money, Materials, Machines, and People.

Ask:

1. What are the limitations on money, people and time? Is there any flexibility?
2. What is the most critical constraint (money, people or time)?
3. Are there other projects using the same resources at the same time?
4. Do we have the knowledge necessary to be successful?

Once you have gotten the answers to these questions, you can identify vulnerabilities and make the necessary adjustments.

Each day review:

- Project schedule status
- Resource allocation
- Project expenditures against the budget

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EXERCISE

Project Definition/Scoping

Select a project to work on as a team. Choose from one of the following projects:

- Cleaning your basement
- Getting to work on time
- Upgrading to a new car
- Design an updated backyard
-

Notes:

The Process:

1. Develop a presentation.

2. Identify the goal(s) of the project.

3. Identify the deliverables of the project.

4. Provide information on the project scope (i.e., what is included and excluded from the project).

5. Identify any possible constraints in time, cost or people.

Common Mistakes in the "Define" Stage

Many projects fail because of mistakes or omissions made during the define stage. Often project managers don't understand what the customer wants and the scope of the project. Avoid the following failure factors and you'll minimize the effects of mistakes on your project.

1. Failure to correctly identify and understand the customers. Typically this is the result of knowing too little about the customer's environment and situation.

2. Accepting a situation where you are answerable to many individuals—there is no clear hierarchy for making decisions or solving problems.

3. Failure to clearly identify the projects goals. Objectives and deliverables are not well defined, jeopardizing the project's schedule and budget, as well as the morale of the project team.

4. Failure to gain a clear understanding of project constraints—cost, time, and people.

5. Failure to clearly define and communicate the scope of the project in terms of time, budget, and results.

6. Failure to get support from top management—and failure to ensure that the project has a high-level sponsor.

7. Failure to continually strengthen your project management skillset.

Notes:

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Develop the Project Plan

Project planning is the process of creating and maintaining a "game plan" to reach the goals the project was intended to address. The purpose of planning is to answer the who, what, when, how long, and how much.

Ask:

- What must be done?
- Who will do the work?
- When must it be done?
- How long do we have to do it?
- How much will it cost?

Creating the Project Plan – The Work Breakdown Structure (WBS)

The work breakdown structure is a graphic representing all the project work. The project work is broken down into tasks. The WBS allows you to organize your project plan in manageable, measurable chunks of activity. The work breakdown structure:

- Shows project activities as tasks, subtasks and sub-subtasks
- Identifies all the work required to complete the project and who is responsible
- Shows tasks in non-sequential order
- Contains information on project resources and task durations

Key Tips for Creating a Winning Work Breakdown Structure

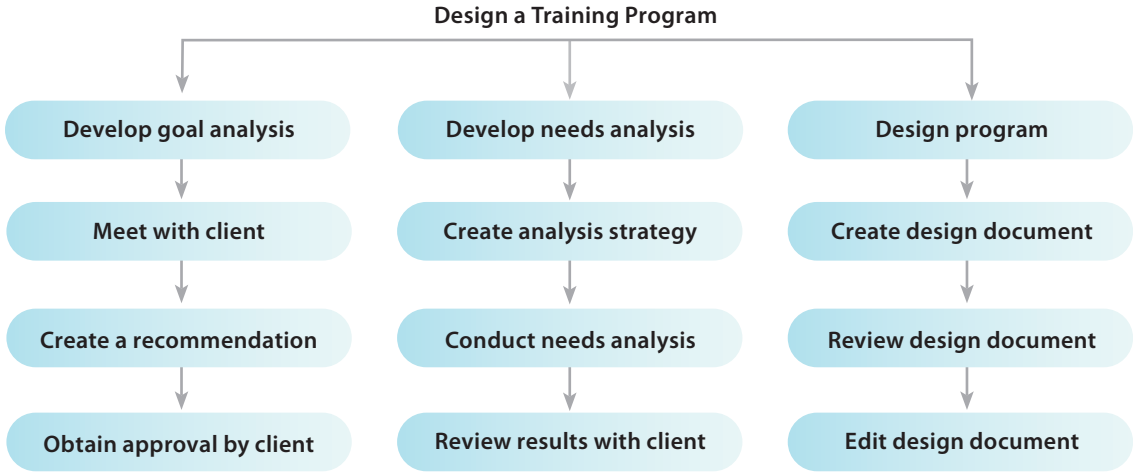
- Identify major work groups
- Break the work groups down in to tasks
- Brainstorm tasks with all members of the project team
- Identify sub tasks and then sub-sub tasks
- Identify task owners

When the work breakdown structure is complete, be sure to review it with the customers, team members and senior management. That way, everyone has ownership in the project.

Work Breakdown Structure Format

There are two common forms of work breakdown structures. Use either for project success.

Standard Format



Outline Format

Notes:

Design a training program:

1. Develop a goal analysis
   - **1.1** Meet with client
   - **1.2** Create a recommendation
   - **1.3** Obtain approval by client
2. Develop a needs analysis
   - **2.1** Create analysis strategy
   - **2.2** Conduct needs analysis
   - **2.3** Review results with client and identify scope changes
3. Design program
   - **3.1** Create design document
   - **3.2** Review design document
   - **3.3** Edit design document

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EXERCISE

Working with your team, develop a presentation of your project. The presentation should include the following:

1. Identify at least three to five main tasks and deliverables for your project.
2. Identify the subtasks.
3. Complete a WBS for your project, using either the outline format or the standard format.

The WBS is not a sequential list of tasks. It is simply a list of activities that must take place for the project to be completed.

Estimating Time

Once project tasks have been identified, duration or time estimates must be made for each task.

Estimating Durations

1. Determine fixed milestones
2. Identify the earliest time a task can be started
3. Calculate the actual task duration
   - Limit task durations to no more than four to six weeks
4. Identify predecessors

Use the weighted average technique to estimate time for projects where there is no historical data. This will allow you to put first things first and avoid scheduling conflicts.

E = Estimated time

O = The most optimistic time to finish the task

M = The most likely time to complete the task, based on repetitive experience

P = The most pessimistic time to finish the task

Notes:

To Estimate Time:

$$E = \frac{O + 4M + P}{6}$$

For example, if:

O = 3 months

M = 6 months

P = 12 months

$$E = \frac{3 + (4 \times 6) + 12}{6} = \frac{39}{6} = 6.5$$

Calculate E when:

O = 1 week

M = 3 weeks

P = 11 weeks

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Successful Estimating

A successful project manager has to be in tune with all aspects of the project. Time estimates are a critical part of project planning. Use the following eight tips for more accurate time estimates.

- Use an industry benchmark
- Estimate the average time
- Ask for feedback from the project team
- Reference past projects
- Involve subject matter experts
- Factor in assumptions
- Assess skill levels of those responsible
- Assess time commitments of team

EXERCISE

Using the WBS created by your team, pick two of the tasks to practice calculating a weighted average duration.

Task _____

Task _____

E = _____

O= _____

M = _____

P = _____

Project Scheduling Models

Project managers use different planning models including Gantt and PERT (Program Evaluation Review Technique). Both have pros and cons. Choose the one that works best for you.

Gantt Charts – Gantt charts (bar charts) are the most commonly used charting tool. They are widely used because of their simplicity and ease of use.

Building a Gantt chart

1. List all project activities
2. Chunk activities into common groups
3. Determine the activity sequences
4. Determine predecessors
5. Determine durations
6. Determine personnel resources
7. Create the chart

Gantt Chart

Pros	Cons
• Easy to read and understand	• Critical path is not easy to see
• Easy to identify task dependencies	• Difficult to see impacts of delays
• Chart can be calendar or time based	• Inhibits ability to see resource options
• Simple to update	• Hard to evaluate the effects of change

While Gantt charts are easy to use, it is important to identify the critical path in your project.

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Simplify with a Gantt Chart

Project GANTT Chart

ID	Name	Duration	Aug 23	Aug 30	Sept 6	Sept 13	Sept 20	Sept 27	Oct 4	Oct 11	Oct 18	Oct 25	Nov 1
1	"Go Ahead"	0 w	◆										
2	Manage Project	11 w	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬	▬
3	Select Computers	2 w	▒	▒									
4	Select Software	3 w	▬	▬	▬								
5	Purchasing	1 w				▬							
6	Write Training Material	3 w				▒	▒	▒					
7	Write User Manual	2 w							▒	▒			
8	Develop User Training	2 w				▒	▒						
9	Plan Installation	1 w					▬						
10	Install Computers	2 w						▬	▬				
11	Install Software A	2 w								▬	▬		
12	Install Software B	1 w										▬	
13	Train Users	1 w										▬	
14	Dry Run/System Test	1 w											▬
15	Acceptance	0 w											◆

Sample GANTT Chart for F. Jones

ID	Name	Duration	Aug 23	Aug 30	Sept 6	Sept 13	Sept 20	Sept 27	Oct 4	Oct 11	Oct 18	Oct 25	Nov 1
1	Select Software	3 w	▬	▬	▬								
2	Purchasing	1 w				▬							
3	Plan Installation	1 w					▬						
4	Install Computers	2 w						▬	▬				
5	Install Software A	2 w								▬	▬		
6	Install Software B	1 w										▬	
7	Dry Run/System Test	1 w											▬

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Fail-Safe Planning Formulas

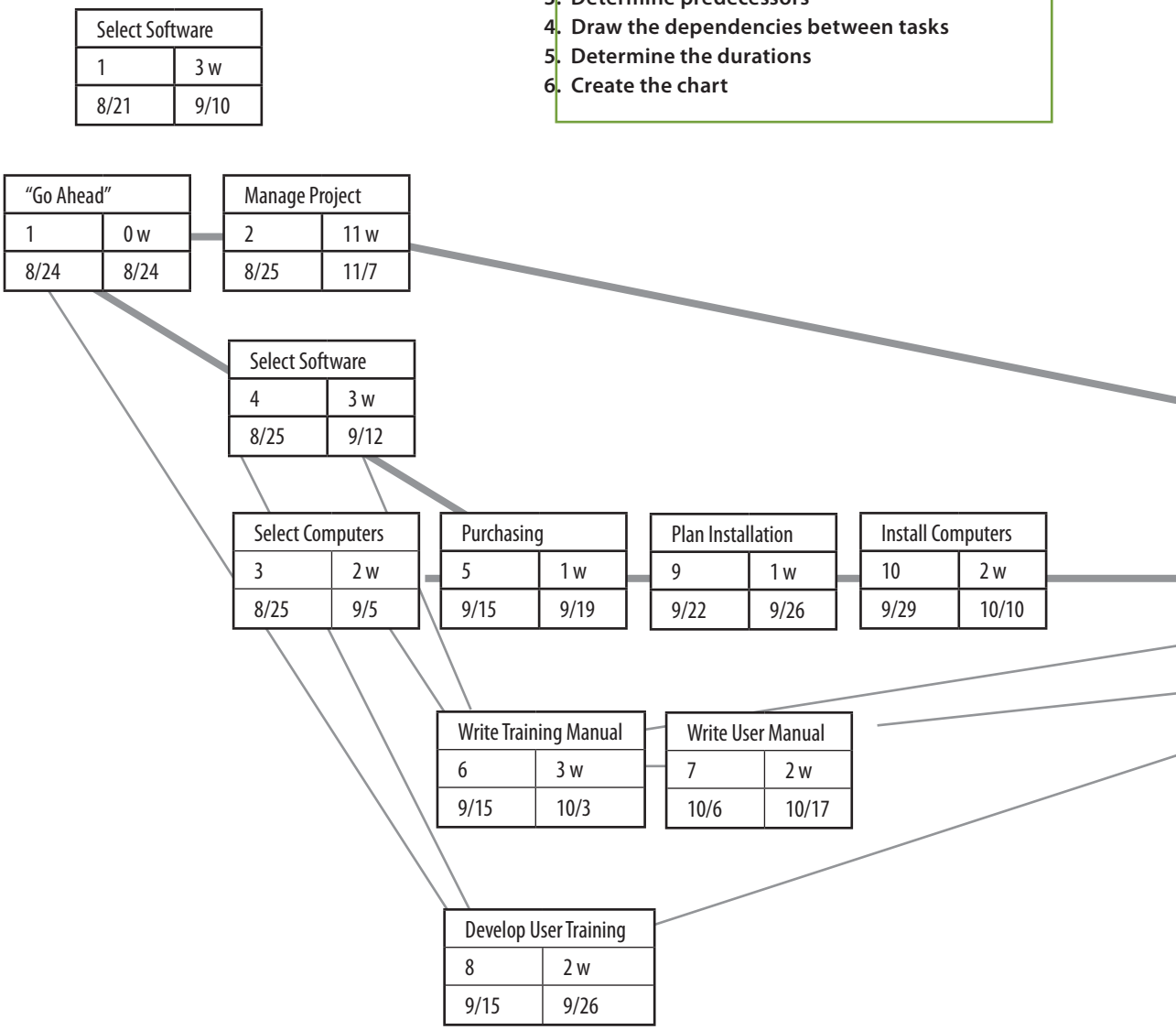
PERT (Program Evaluation and Review Techniques) and CPM (Critical Path Method) are two very similar techniques that over time have blended into one. This powerful network planning tool will help you see how activities are interrelated.

A task is represented by a box and is connected to other tasks by lines to show dependencies.

Building a PERT Chart

1. **List all project activities on note cards**
2. **Determine the activity sequences**
3. **Determine predecessors**
4. **Draw the dependencies between tasks**
5. **Determine the durations**
6. **Create the chart**

Sample PERT Chart



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Fail-Safe Planning Formulas

Task 2 is dependent on Task 1:

Select Software	
1	3 w
8/21	9/10

Purchase Computers/Software	
2	1 w
9/11	9/17

Task 3 is dependent on both Tasks 1 and 2:
Task 1 and 2 are parallel to each other:

Select Computers	
1	2 w
8/21	9/3

Purchase Computers/Software	
3	1 w
9/11	9/17

Select Software	
2	3 w
8/21	9/10

Install Software A	
11	2 w
10/13	10/24

Train Users	
13	1 w
10/27	10/31

Dry Run/System Test	
14	1 w
11/3	11/17

Acceptance	
15	0 w
11/7	11/7

Install Software B	
12	1 w
10/27	10/31

Critical Path Analysis

Path – A sequence of activities laid out with the initial activity proceeding to successor activities until the entire event is complete. A PERT/CPM chart can consist of multiple paths.

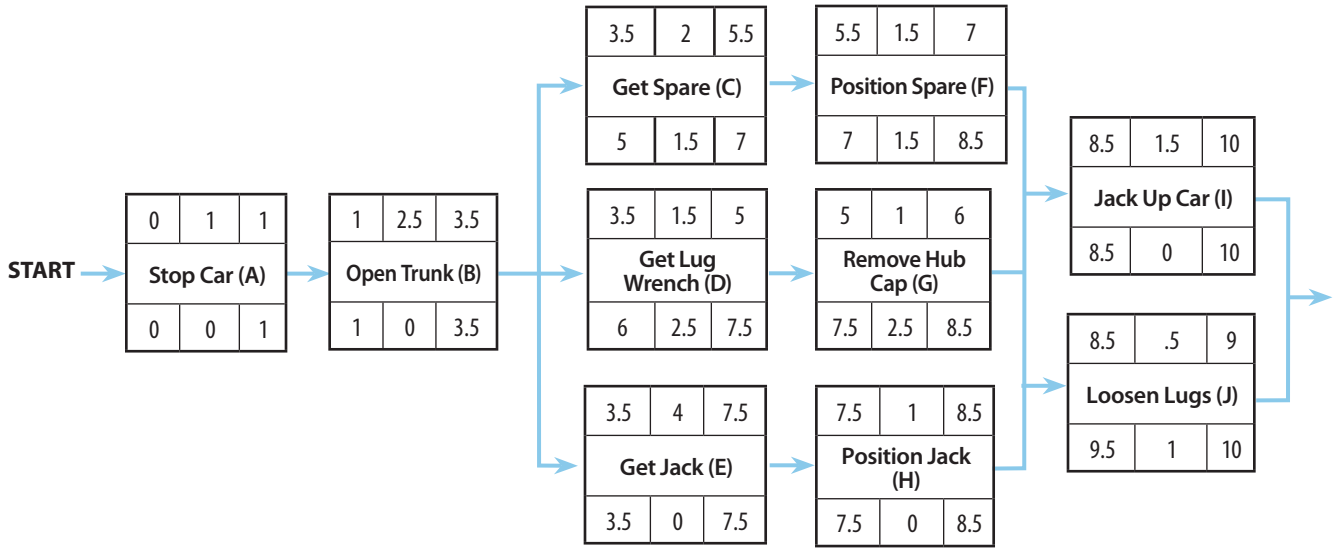
Critical Path – The longest path in time.

Slack/Float – Extra time available to complete tasks that are not on the critical path.

Early Start (ES)	**Duration (t)**	**Early Finish (EF)**
Task		
Late Start (LS)	**Float (F)**	**Late Finish (LF)**

Term	Calculation	Definition
Early Start (ES):	$ES_1 = EF_0$	The ES is the latest EF of the preceding task(s).
Early Finish (EF):	$EF_1 = ES_1 + t_1$	The EF is the ES of the task plus the duration.
Duration (t):	t_1	The duration is the time it takes to complete the task.
Float (F):	$F_1 = LF_1 - EF_1$	The Float is the leeway time of a task.
Late Start (LS):	$LS_1 = LF_1 - t_1$	The LS is the LF of the task minus its duration.
Late Finish (LF):	$LF_1 = LS_2$	The LF is the earliest LS of the next task(s).

Flat Tire Example



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Evaluating Project Risk

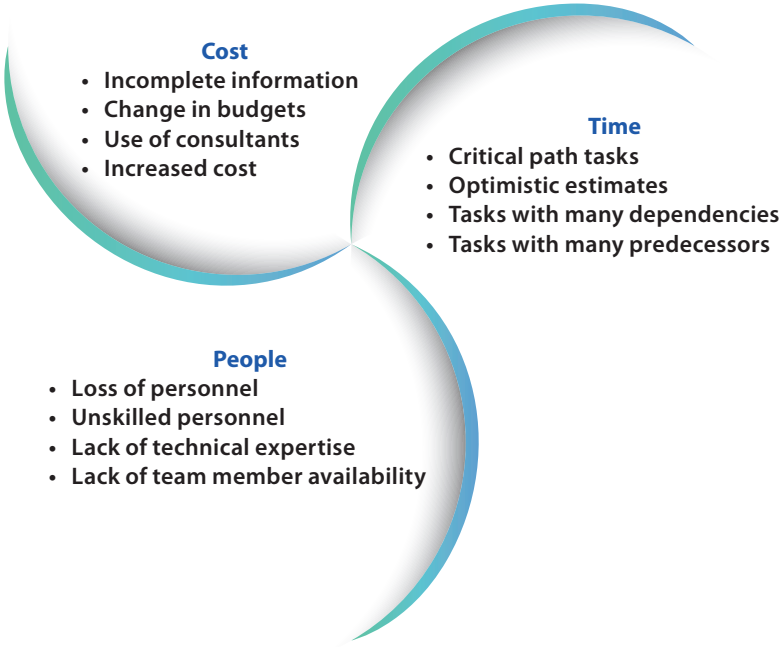
Because project management includes a great deal of estimating, it also carries a certain amount of risk. It is best to plan as if things may deviate from the original plan.

Risk Assessment

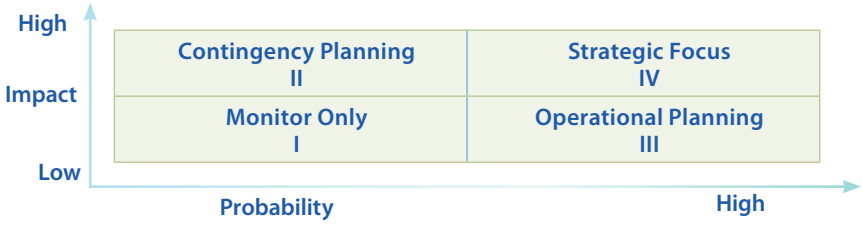
Notes:

- Allows the project manager to anticipate potential problems
- Enables contingency plans to be developed
- Allows decisions to be made quickly
- Minimizes possible schedule delays
- Creates opportunity for a proactive response
- Enables management to see quality aspects of planning

Elements of Risk



Categorizing Risk



EXERCISE

Identify any potential problems or areas of risk with your project:

1. Clarify the risk in terms of time, cost and people.

2. List the following:

- Probability of the risk occurring
- Potential impact to the project
- Assumptions
- Contingency plan

3. Prepare a three minute presentation of your risk analysis.

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Avoid Project Pitfalls

Project managers must constantly monitor their projects, anticipating possible problems and making sound decisions.

Problem	Solution
Lack of information	• Request additional information from upper management
Time constraints	• Negotiate additional time • Request additional resources • Contract with a consultant
Personnel changes	• Have a fast track process for new members • Assign a mentor/team member
Financial constraints	• Negotiate level of quality • Decrease scope • Eliminate the non-essentials
Over-allocation or unavailability of critical resources	• Plan contingencies for critical • Shift resources from non-critical tasks
Loss of team member	• Plan backups for each critical team member • Replace with a new team member as soon as possible

Notes:

Change Happens!

Change can be very disruptive to the team. The way you handle change as the project manager can help set the tone, keeping team members positive, loyal and committed.

Source of Change

Scope change—Often referred to as scope creep, where the project expands from its original intent without legitimate change orders. Scope creep can cost your project more time, resources, money, or extra work. Scope creep often occurs in:

- Project requirements
- Design
- Tasks
- Deliverables

Control Scope Creep

- Insist on receiving change notices
- Communicate impact of change to the project team, stakeholders, sponsor, and customer
- Monitor impact of changes and adjust the schedule accordingly
- Know when to say "No"

Help the Project Team Adjust to Changes

- Communicate reasons for the change
- Tell the team about changes before they hear from someone else
- Ask for the team's input and thoughts on project impact

Notes:

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Top Notch Communication

Successful project managers know the importance of good communication. This helps keep the project team on track and informs the project stakeholders and clients of the project status.

What to Communicate and When:

	Weekly	As Needed	Immediately
Project Status	X		
Work Status	X		
Milestones Achieved		X	
Tasks Achieved	X		
Upcoming Tasks	X		
Areas of Risk	X		
Issues		X	
Cost Status		X	
Problems			X

Communication is the key to progressive decision making. By keeping everyone informed and on-task, necessary decisions can be made to keep the project moving.

Good communication will help:

- Build team commitment
- Set common expectations
- Allow potential problems to be spotted early

Regular communication is a key to successful projects. By keeping everyone "in the loop," you will be able to build and sustain commitment over the long haul.

Documentation, Documentation, Documentation

It is important to maintain continuity in your project by keeping a record of project activities. Maintaining a project notebook will increase your communication effectiveness and provide useful project information.

Benefits of a Project Notebook

- Organized, central location for project documentation
- Provides the latest project information
- Enables management to gain information quickly
- Creates "history" for future projects

Notes:

Project Notebook—Contents

- List of team members, including contact information
- Project definition and objectives
- Scope definition
- WBS
- Network diagram
- Meeting reports
- Project status reports
- Risk analysis
- Issues log
- Change orders
- Contingency plans
- Cost/budget information
- Management reports
-
-
-

The project notebook will allow you to communicate the progress of your project to team members and management at a moments notice.

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Team Communication

Regular communication with the project team is critical so that you can stay on top of project status. Use the following tips to keep project meetings on track, making them useful and productive.

Meeting Checklist

- Schedule regular meetings—Try to hold team meetings on the same day and same time each week. This allows team members to block their calendars.
- Prepare an agenda—Distribute the agenda in advance of the meeting to give team members time to prepare.
- Prepare yourself—One of the most important traits of a successful project manager is people skills. Project meetings are one of the best ways to connect with your team. Take advantage of it!
- Manage meeting time—Respect others. Start and end the meeting on time. Manage discussion throughout the meeting, keeping others on task.
- Take minutes—It is important to document project updates and status for future reference.
- Insist on full participation—Each team member is responsible for project tasks. Hold them accountable by being prepared for team meetings and status updates.
- Establish ground rules—Set performance expectations of all team members.

Team Meetings

Regular team meetings are a critical communication tool. Start your team off right with a project kick-off meeting. Make sure to:

- Have team members introduce themselves
- Share project objectives
- Review the critical path
- Discuss the work breakdown structure
- Discuss project risks
- Distribute a team contact list
- Highlight project milestones and key dates
- Review team expectations and ground rules

Build a Strong Team

There are seven fundamentals that indicate whether a group is truly working as a team. Use this assessment to identify skills you need as a project manager by better understanding the unique organization of your team.

EXERCISE

Look at the statements listed below and indicate where your team is for each. Circle a "5" if your team excels in this dimension. Circle a "1" if your team is low in this dimension. Use these scores as your baseline measurement. Complete this assessment in 90 days to compare your progress.

	1	2	3	4	5
The team has a strong structure and sense of identity.					
Team members get things done by working collaboratively.					
There is a basic unspoken agreement about who we are, what we are doing, and where we are going.					
Team member relationships and performance expectations are clear, and all members participate in achieving challenging goals.					
There is a cooperative and productive environment.					
Communication is open, direct, relevant and businesslike.					
Team members are able to work through team issues.					

Notes:

Have your team take this assessment. It is a good team-building technique to use to encourage discussion and keep the lines of communication open. It will also help improve team productivity and performance.

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Team Problem Solving

While you may anticipate problems, you can't completely avoid them. Use this six-step model to help your team navigate problems successfully and keep your project on time, on budget, and meeting objectives.

The two key skills that will help you anticipate problems before they become difficult to solve are:

- Regular and open communication with team members
- Regular review of project issues

Handling Conflict and Controversy

Be prepared to defuse the emotions and get the project back on track.

Three Major Causes of Conflict

1. Clashing styles

- Quick decision-makers may get frustrated with members who need time to think
- Detail-oriented members may feel that members who are more "big picture" oriented are not concerned about quality

Recommendation:

- **Encourage the members to talk about their differences and find a compromise**

2. Unmet expectations

- If members are afraid of confrontation and never speak up for their position, it can result in unmet expectations
- Some team members' fears of hurting the feelings of others keeps them from being open about their expectations

Recommendation:

- **Discuss and develop a team set of standards for work performance**

3. Competition for resources

- In environments where teams feel they are competing for resources, conflict may occur
- This conflict may show itself some in team members "padding" their resource needs

Recommendation:

- **Review the WBS and the network diagram to manage limited resources**

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Project Management Software

Use of computers and project management software can be helpful in assisting in the successful completion of projects. However, these are only tools. Choose what works best for your business.

Four Advantages of Using Computers in Project Management

1. Provides a quick method for updates
2. Helps control a large volume of information and provides historical data
3. Allows several people to view project status
4. Supports today's virtual office

Three Dangers to Avoid When Using Computers

1. Can be expensive
2. Often requires end user training
3. Can be difficult to use

Pinpoint Your Projects Specific Hardware and Software Requirements
Evaluation Methods • **Is the software easy to install?** • **Is the software complex?** • **Are the instructions clearly written?** • **Is there formal training available?** • **Is our hardware capable of handling the necessary software?**
Installation and Conversion • **Do plans exist for maintenance of the system?** • **Installation has been planned to have minimal impact on the users?** • **Is there a contingency plan in case there are problems with the conversion?**
Scheduling and Controlling • **Can the system handle multiple projects?** • **Can multiple projects be viewed at the same time?** • **What level of project tracking is supported?** • **How are resources displayed?**

Selecting Project Management Software

Project management software comes in many different forms. Some software is very simple and relatively inexpensive while other project software is much more complex and expensive. Use the following six step checklist to evaluate your computer software options.

1. Is your project mostly within one functional area of your business? **2. Are you able to schedule using durations rather than using more complex resource capacity planning?** **If this describes your project, and you are likely only going to prepare simple Gantt or PERT charts, you may be able to get by with lower end project management software.** **Some suggestions include: TurboProject, Quick Gantt or Microsoft Project**	◯ Yes ◯ No ◯ Yes ◯ No
3. Does your project include more than one functional area of your business? **4. Will you need to build your plan on estimated hours of work, budgets and resource management?** **If this describes your project consider using: Microsoft Project or Primavera**	◯ Yes ◯ No ◯ Yes ◯ No
5. Do you work for an organization with a project based organizational structure? **6. Is there a need to roll many projects together to analyze risk, actual cost data and resources?** **If this describes your situation, consider using:** **Microsoft Project, Open Plan or Micro Planner X-Pert**	◯ Yes ◯ No ◯ Yes ◯ No

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Key Tips for Making the Right Software Choice

1. Determine your needs carefully. Deciding on project management software should benefit your organization for future projects, not just your current project.

2. Read reviews and gather recommendations. Benchmark other departments or organizations. Get an idea what will work best for you.

3. Once you have purchased the software, invest in formal training. Today's software has such high functionality; it will benefit you to learn how to use the software to its fullest capability.

4. Use only the software functions that are necessary to your project. Depending on the complexity of your project, there may be functions that you don't need to use.

Project Completion

A clean ending is as important as a smooth beginning. One of the final tasks you have as a project manager is to finalize the project and conduct a formal review. Unfortunately, this is often one of the most neglected project management tasks.

Elements of the Project Closeout

1. Closeout tasks should be listed on the WBS
2. Review all outstanding issues
3. Prepare a final project report
4. Hold a close out meeting with the team
5. Close out any final bills
6. Discuss/brainstorm lessons learned
7. Provide information for future planning
8. Offer team recognition

Notes:

And finally… Celebrate the success of your project!!!

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Project Management Reference Handbook

Ten Reasons Projects Fail

1. Inadequate Project Manager authority
2. Lack of team participation in planning
3. Lack of project team participation in problem solving
4. Improper structuring and use of status reports
5. Use of superficial status and progress reports
6. Inadequate Project Manager human skills
7. Inadequate Project Manager technical skills
8. Inadequate Project Manager administrative skills
9. Unrealistic project schedules
10. Unclear project goals

Project Risk Analysis Worksheet

Activity	Amount of Risk			Degree of Damage			Action Steps	
	Low	Medium	High	Low	Medium	High	No Action	Type of Action

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Project Change Form

Project :_____ **Date:** _____

Project Manager: _____ **Date Requested By:** _____

Requested Change

Description of request: _____

_____

_____

Reason for change: _____

_____

_____

Effect of the project:

Schedule _____

_____

Cost _____

_____

Scope _____

_____

Quality_____

_____

Approved/Denied

Project Manager: _____ **Date:** _____

Project Sponsor: _____ **Date:** _____

Other: _____ **Date:** _____

Comments: _____

_____

_____

Project Status Report

Project: _____

Status Date: _____

Overall Project Status: ☐ Green ☐ Yellow ☐ Red

If yellow or red, problem resolution plan: _____

_____

_____

_____

Tasks completed this week: _____

_____

_____

_____

Tasks scheduled for next week: _____

_____

_____

_____

Constraints: _____

_____

_____

_____

Constraint removal suggestions: _____

_____

_____

_____

Sign Off

Prepared by: _____

Reviewed by: _____

Approved by: _____

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Sample List of Deliverables

- Project plan
- Scope statement
- Resource estimates
- Cost estimates
- Project overview and approach
- Projected risks
- Contingency plans
- Cutover plan
- Phase-out plan
- System test plan
- Training plan
- Training materials

Notes:

Make Sure You Are Solving the Right Problem

Ask those who have the need to define it as clearly as possible.

Use a list of "stock" questions:

- What do you want to be done?
- Why do you want it?
- How will things be different if the project is successfully completed?
- If time, money and feasibility were not an issue, what would you really like?
- What is it worth to you to have the need satisfied?
- If you ranked the various needs you had right now, where would this one fit?
- What are all the benefits you might get from this project?
- How important is this project to you?

Research the need.

Notes:

Explore alternative solutions.

Prepare a preliminary objective.

Test your objective.

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Appendix

Completed Sample Project Network Information

	Task	Dependent on Tasks	Estimated Duration
1.1	Go Ahead	N/A	0 weeks
1.2	Manage Project	1.1	11 weeks
2.1	Select Computers	1.1	2 weeks
2.2	Select Software	1.1	3 weeks
2.3	Purchase Computers/Software	2.1, 2.2	1 week
3.1	Write Training Manual	2.1, 2.2	3 weeks
3.2	Develop Training Program	3.1	2 weeks
4.1	Plan Installation	2.3	2 weeks
4.2	Install Computers	4.1	1 week
4.3	Install Software	4.2	2 weeks
5.2	Train Users	3.1, 5.1, 4.3	3 weeks
4.4	Dry Run/System Test	5.2	1 week
1.3	Acceptance	4.4, 3.2	1 week

Sample Project

	Name	Aug 23	Aug 30	Sept 6	Sept 13	Sept 20	Sept 27	Oct 4	Oct 11	Oct 18	Oct 25	Nov 1	Nov 18
1.1	"Go Ahead"												
1.2	Manage Project												
2.1	Select Computers												
2.2	Select Software												
2.3	Purchasing												
3.1	Write Training Material												
3.2	Write User Manual												
4.1	Develop User Training												
4.2	Plan Installation												
4.3	Install Computers												
5.2	Install Software												
4.4	Train Users												
1.3	Dry Run/System Test												
15	Acceptance												

Task Analysis: Key to Effective Planning

Task Objective:

Task Milestones	Measurement	Time
1.		
2.		
3.		

Task(s) on Which this Task is Dependent:

Task(s) Which Are Dependent on this Task:

Itemized Task Budget:

Assigned to:

Report to:

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