a wonderfully crafted

Book Presentation
Are you an unofficial project manager?

If most of your work has been spent on projects and you’ve never been exposed to formal project management training, YOU are an unofficial project manager.

By the numbers:

- Only 8 percent of organizations are high performers in managing projects.
- 45 percent of projects are either overdue or cancelled.
- Only 45 percent of projects actually meet the goals that they are intended to reach.
- For every $100 invested in projects, there’s a net loss of $13.50 lost.
Why do projects fail?

1. Lack of commitment/support
2. Unrealistic timelines
3. Too many competing priorities
4. Unclear outcomes/expectations
5. Unrealistic resources
6. People pulled away from projects
7. Politics/legislation
8. Poor planning
9. Lack of leadership
And why do projects succeed?

1. Meets or exceeds expectations
2. Optimizes resources
3. Builds team confidence and morale for future projects

Too many people call a project a success if you meet the deadline and the budget... but did you really achieve your business outcomes? Did you optimize resources? Did you meet and surpass expectations?
Here are YOUR five steps for being successful...

1. Initiate
2. Plan
3. Execute
4. Monitor and control
5. Close
Process = Success
The Magic Sauce...

People + Process = Success
Informal authority inspires people to want to play on your team and win.

1. Demonstrate respect
2. Listen first
3. Clarify expectations
4. Practice accountability
1. Demonstrate respect

- Don’t be a doormat!
- Have straight talk consistently with everyone at every level.
- If you respect others, they’ll respect you. Then, you’ll be pleased with the outcome.
2. Listen first

- Resist the temptation to talk more than you listen.
- Understand the problem first through the eyes of all of the stakeholders.
- Get to know your team by showing vulnerability.
3. Clarify expectations

- Constantly clarify the specific and overall expectations of your team.
- Keep your team informed.
- Clearly communicate how everyone’s role contributes to the whole.
4. Practice accountability

- Be a model of excellence
- Admit your mistakes.
- Hold yourself and others accountable.
- The first three principles really augment the 4th.
Chapter 3: Initiating the Project

INITIATE Mindset: You must clarify a shared and measurable set of expectations.
What determines a project’s failure?

- Going off budget
- Missing a deadline
- Accidentally doing the wrong project
- Disappointing the stakeholders
Sensitivity to Initial Conditions

- Primary reason that projects fail: unrealistic expectations based on insufficient data
- Solution: make expectations clear from the beginning
  - Identify Stakeholders
  - Identify Key Stakeholders
  - Interview Key Stakeholders
  - Create a Project Scope Statement
Identify Stakeholders

Stakeholder: a person or organization actively involved in or impacted by your project

- Who will this project impact?
- Who determines success and what are their expectations?
- What are the limitations?
- How do you create a shared understanding of the project outcomes?
Identify Key Stakeholders

Key Stakeholder: any person who determines the success or failure of the project

- Decisions
- Authority
- Need
- Connections
- Energy

Easy to identify DAN but CE are often overlooked
Interview Key Stakeholders

Key Stakeholders want to know “What’s in it for me?”

- Project purpose
- Description
- Desired Results
- Exclusions
- Communication Needs
- Acceptance Criteria
- Constraints
Project Limitations and Constraints

Important to prioritize a list of constraints

Areas of Possible Constraints

SCOPE
The sum of the products, services, and results to be provided.

QUALITY
The degree to which project characteristics fulfill requirements.

RESOURCES
People (individuals or teams), equipment, services, or supplies needed to fulfill requirements.

BUDGET
The approved estimate for the project.

RISK
An uncertain event or condition that, if it occurs, has an effect (usually negative) on project results.

TIME
The deadlines by which products, services, and results are to be delivered.
Create Project Scope Statement

Project Scope: the ‘borders’ of your project

Project Scope Statement: a clear set of expectations approved by all stakeholders and group members

- Same criteria as Key Stakeholder interview
- Combine information from interviews to draft picture of project’s scope
Chapter 4: Planning the Project

1. Manage risk effectively
2. Break a project down into manageable pieces
3. Schedule project deliverables and associated components
4. Identify necessary resources
5. Identify communication channels

PLAN Mindset: You must create a clear road map for smart decision making.
Manage Risks Effectively

Identify risks and assess impact: avoid getting blindsided

- Make a list of things that could go wrong
- **Tool:** Risk Matrix
  - Impact * Probability = Actual Risk
- **Tool:** TAME the risks
  - **T**ransfer the risk to a third party
  - **A**ccept the risk
  - **M**itigate the risk
  - **E**liminate the risk
- **Tool:** Risk management plan
  - Communicate in a plan these risks and corresponding strategies
Break a Project Down into Manageable Pieces

Create a project schedule: develop the Work Breakdown Structure (WBS)

- Organize and define the total scope of the project in terms of deliverables and components
- Tools: Mind map, Linear list, Post-it method
Schedule project deliverables and associated components

Sequence activities: figure out dependencies

- Two activities that are reliant on each other’s start or finish

Estimate duration of each task: work != duration

- Work: time needed to accomplish the task and drives the project budget
- Duration: time needed to get the work done and drives the project schedule
- Tools: Milestones, PERT

Identify the critical path: identify and avoid bottlenecks

- Longest sequence of scheduled activities that must start and end as scheduled that determine the duration of the project
Identify Necessary Resources

Identify the project team

- Who is going to do what?
- The goal defines the team, so it’s important to have a clear roadmap and establish informal authority with the team
- Focus on who is right for a task rather than who is available

Create a project budget

- Account for external expenses and internal expenses
- Add 10% overall budget for miscellaneous expenses
Identify Communication Channels

Develop a communication plan

- Determine the information and communications needs of stakeholders
- Tool: Project communication plan

<table>
<thead>
<tr>
<th>WHAT</th>
<th>WHO</th>
<th>HOW</th>
<th>WHEN</th>
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<tbody>
<tr>
<td>COMMUNICATION TYPE</td>
<td>INITIATOR</td>
<td>AUDIENCE</td>
<td>METHOD/CHANNEL</td>
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<td>Research Updates</td>
<td>Research Team</td>
<td>Core Team - Key Stakeholders</td>
<td>Reports via Email</td>
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<td>Team Accountability</td>
<td>Evc</td>
<td>Project Leader</td>
<td>Virtual Meeting</td>
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<tr>
<td>Status Report</td>
<td>Evc</td>
<td>Core Team - Key Stakeholders</td>
<td>Video Conference</td>
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Chapter 5: Executing the Project

EXECUTE Mindset:
Engage people
through consistent
and shared accountability.
How do you execute successfully as a team?

Practice accountability - reinforce informal authority by proving that every commitment matters.

Set a cadence of accountability through regular team accountability sessions:

- Focus on the project schedule and budget
- Commit to doing what's necessary to get back on track
- Enable the team to see the project as a whole and keep it moving
- Solve problems together
- Never skip it!
What about lapsed commitments?

Hold yourself accountable to the Four Foundational Behaviors:

1. Listen first. Let the team member describe why the commitment was missed.
2. Demonstrate respect. Be empathetic about the situation.
3. Clarify expectations. Restate the commitment, update the deadline for completion.
4. Practice accountability. Let the team member know the team counts on everyone’s commitments. Each commitment made is integral to project success.
Performance Conversations

If a team member consistently not meeting their commitments:

1. Set up a 1:1 performance conversation
2. Explain why you want to talk.
3. Remind them what is at stake and listen with empathy.
4. Ask for their opinion on what to do
5. Figure out a way to clear the path.

A Conversation Planner helps to lay out a Performance Conversation by defining the intent, facts, impact, and action items.

This format can be used for positive feedback as well!
chapter 6:

Monitoring 🎨 and Controlling ⛔️ the project

**MONITOR AND CONTROL Mind-set:** Drive progress through transparent communication.
Monitoring 🎈 and Controlling 🧑‍💻 the project

- Making sure the project goes as planned
- On time, on budget, and with quality
- Scanning the environment to identify and keep track of risks
- Acting on risks
- Keeping stakeholders updated and informed
- Preventing Scope Creep
Project Status Report

- It’s important to keep stakeholders informed on the project status, whether it be good or bad
  - Have a plan of attack to address all concerns and be honest.
  - Your stakeholders might be able to assist you easily

- Transparency is Key
- Always use the Four Behaviours when conveying info
Preventing Scope Creep: Scope Change Control

- As we know, Scope Creep is the WOAT
- Think about:
  - What is the intent of the change?
  - What is the impact?
  - What would be required to make the change happen?
- Summarize this in a *Project Change Report* that simplifies all the key info
## Serving The Result

<table>
<thead>
<tr>
<th>IF THE SUGGESTED CHANGE . . .</th>
<th>THEN YOU HAVE . . .</th>
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<tbody>
<tr>
<td>• Adds cost and time without adding significant value for the customer</td>
<td>(bad)</td>
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<td>• Makes the project less clear, more confusing, less focused</td>
<td>• Scope creep</td>
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<td>• Provides value but can be done later as a separate project or add-on</td>
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<tr>
<td>• Is motivated by politics rather than an identified need</td>
<td>Tres bien</td>
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<td>• Leads to a better way to meet the real, immediate needs of the stakeholders</td>
<td>• Scope discovery</td>
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<td>• Clarifies the project’s purpose</td>
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<td>• Focuses the project more narrowly on a manageable solution</td>
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chappy 7:

Closing the Project: End Happily 😊 or Just End 😞

THE CLOSING PROCESS

Generating, gathering, and disseminating information to formalize project completion, including evaluating the project and compiling lessons learned for use in planning future projects.

—PMBOK 3.3
The Closing Process

- It’s not always about whether you succeeded or not
- The most important step in the closing process is to formalize what you learned and the friends you made along the way

- Evaluating a series of tasks using the **Close Checklist**
this is a close checklist

**CLOSE CHECKLIST**

- Evaluate task list.
- Confirm fulfillment of project scope.
- Confirm fulfillment of all Project Change Requests.
- Complete procurement closure.
- Document lessons learned.
- Submit final status report to key stakeholders.
- Seek feedback from key stakeholders.
- Obtain all necessary sign-offs.
- Archive project documents.
- Publish success.
- Celebrate project close with rewards and recognition.

*Project Name:*

Prepared by: __________________________ Date: __________________________

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Confirm Fulfillment of Project Scope

● When doing this it’s important to reflect and gather thoughts and knowledge and confirm you’ve done your job.
● Use these questions:

  • Did we meet the goals of the project?
  • Are you satisfied with the end result?
  • Did we deliver in a timely manner?
  • Was it worth the cost?
  • Did we do a good job of anticipating and mitigating risk?
  • Any ideas for improving our process?
Celebrate