



Project Management 101
Review Session

Schedule

Agenda	Time	Notes
Introduction	930am	Session overview
PM101 Review	940am	Key Concepts and Documents
Your Project Proposal	1010am	Go over components of a Project Proposal
Sample Project Submission	1030am	"Discovery Day" sample submission
Next Steps + Q&A	1130am	
Conclusion	12pm	



PM101 – Review Session

Project Initiation (Starting a Project)

Project Planning (Getting Organized)

Project Execution (Performing the Work)

Project Monitoring (Monitoring Progress)

Project Closing (Closing Out)



PM101 – Review Session

Project Initiation (Starting a Project)

Project Definition (Temporary, Unique, Coordinated Undertaking)

Business Need

Project Justification

Product Description/Deliverables

Stakeholders

Constraints

Assumptions

Signoff

Project Charter Walkthrough



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Project Planning (Getting Organized)

- Scope (What has to be done)
- Time (When it has to be done by)
- Cost (How much Money and Resources with which to do the work)
- Quality (How do we know we succeeded?)
- Risk (What could go wrong?)
- Human Resources (How do we build the team?)
- Communications (How do people know how/when/what to do?)
- Procurement (Who could we pay to do the work?)



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Project Scope

- The Triple Constraint (Time/Cost/Scope)
- Scope Statement (Extension of the Project Charter)
 - Project Scope Description
 - Acceptance Criteria: What must be completed in order for the project to be considered a success
 - Deliverables
 - Exclusions
 - Constraints & Assumptions
- ***Project Scope Statement Walkthrough***



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Project Scope

- WBS (Work Breakdown Structure)
 - Product Orientation: What do we need to build (not how)
 - All of the work that has to be performed on the project
 - Hierarchical in nature
 - Decomposition: Breaking down project deliverables into smaller, more manageable components
 - Work Packages (4-80 hours ~ depends?)

Project WBS Walkthrough



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Project Time

Activity Definition

- Target a WBS component
- What tasks must be performed in order to complete the WBS component
- Try to involve experts

Activity Duration Estimates

- PERT Estimates (Pessimistic/Most Likely/Optimistic)
- Benchmarking

Milestones (Zero duration)

$$\left(\frac{\text{PERT Weighted Average} = \text{Optimistic} + 4 \times \text{Most Likely} + \text{Pessimistic}}{6} \right)$$



Getting Organized

Project Time Management

- Activity Sequencing
 - Correct sequence of performing activities now that they have been defined
 - Dependencies (Mandatory/Discretionary)
- Network Diagrams
 - Depicts activities the relationship and dependencies between the activities
- Optimization
 - Crashing
 - Fast Tracking



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Project Costs

- Estimates
 - Top Down (Budgetary Estimates)
 - Bottom Up (Detailed)



Getting Organized

Project Human Resources

Building the Team

- Human Resource Plan
- Acquire Project Team
- Develop Project Team
- Manage Project Team



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Project Execution (Performing the Work)

- The Kickoff Meeting
- Work Authorization System
- Resource Assignment Matrix
- Managing Conflict - Team Building
 - *Interdependence of Team Members*
 - *Common Consensus*
 - *Group Work Commitment*
 - *Accountable as a Functional Unit*
 - *Acknowledgement of Conflict*



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Project Monitoring and Controlling (Monitoring Progress)

- Status Meetings
- Sample RAG Report (Red Amber Green)



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Project Monitoring and Controlling (Monitoring Progress)

- Change Management (Change Control Boards)

Project Closeout (Wrapping Up)

- Closeout (Doesn't just happen at the end)
- Contract Administration
- Lessons Learned



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Project Documents

- Charter Template
- Communication Action Plan
- Project Schedule
- Responsibility Assignment Matrix
- Kickoff Sample Agenda
- Lessons Learned



PM101 – Project Proposal Walkthrough

Project Proposal Template

Project Summary

Working Title of Project	
Project Sponsors	

Proposal Type	<input type="checkbox"/> Idea To Be Explored <input type="checkbox"/> Potentially Identified Solution
Project Type	<input type="checkbox"/> New Project <input type="checkbox"/> Enhancement to Existing or Former Project

Primary Contact	Name	
	Phone	
	Email	
Backup Contact	Name	
	Phone	
	Email	



PM101 – Project Proposal Walkthrough

Executive Summary

- Please provide a summary of the information detailed throughout this project proposal.

Statement of Need

- Discuss the needs or opportunities to be addressed by this project. In your discussion, describe and position these needs or opportunities within the context of your organizational environment. Internal factors, as well as external ones, should be considered.

Project Goals

- Identify the goals of the project. Discuss what is to be achieved and the expected/desired outcomes of this project.

Constraints

- Talk about constraints that could affect the development, implementation, and/or end outcomes of this project. Consider such factors as experience, knowledge, skill sets, budgetary resources, time, competitive environment, and existing investments.



PM101 – Project Proposal Walkthrough

Requirements

- Given your operational context, describe what needs to be in place during the project and afterwards in order for the project to be successful. In your discussion, consider the constraints you identified above and, if necessary, define requirements to compensate for constraints.

Time vs. Relevancy

- In order for this project to be relevant within your operation, satisfy the needs and opportunities defined, and achieve stated project goals, what would be the desired timeline for the project? What do you think is the longevity or useful life of the solution?

Impact: Costs & Risks

- Discuss the expected impact of the project and its expected outcomes. Provide detail on expected and potential costs and risks. Also, consider both one-time as well as on-going costs and risks (i.e., maintenance and support). Wherever possible, quantify the impact of the solution.
- In your discussion speak to the following areas of impact: (1) positioning to take advantage of other opportunities; (2) effect on business processes and workflow; (3) staffing (number of staff required, training, redefinition of roles); (4) effect on client base/end users; (5) budget (i.e., incremental costs needed; potential savings); (6) competitive advantage or standing.



PM101 – Project Proposal Walkthrough

Impact: Benefits & Opportunities

- Discuss the expected impact of the project and its expected outcomes. Provide detail on expected and potential benefits and opportunities. Wherever possible, quantify the impact of the solution.
- In your discussion talk about the following areas of impact: (1) positioning to take advantage of other opportunities; (2) effect on business processes and workflow; (3) staffing (number of staff required, training, redefinition of roles); (4) effect on client base/end users; (5) budget (i.e., incremental costs needed; potential savings); (6) competitive advantage or standing.

Alternative Impact

- Using the discussion points above in the Impact section, describe the alternative impact on your unit and its constituents if this project is not pursued?



PM101 – Project Proposal Walkthrough

Project Fit

- Discuss how this project fits within the strategies defined by your unit. How does this project align with your local unit's objectives and mission? Do you see potential opportunities for this project to benefit other functional areas within the organization or across the University?

Evaluation and Measurement

- Propose criteria that might be used in defining and evaluating the success of this project and its end outcomes. What measurement standards are available to determine if the project is a success and the impact of its end outcomes? What benchmarks can be set up to determine the short-term and long-term efficacy of the project? Consider in your discussion the goals, requirements, and impact defined above.



PM101 – Project Proposal Walkthrough

Potential Solution

- At a high level, describe a potential solution that would satisfy the goals and requirements defined above.

Alternative Solutions

- Do you know of any alternative solutions that satisfy the goals and requirements of this project (either fully or partially)? If so, have they been explored? Discuss why this proposal has been submitted in lieu of alternative solutions.

Contingency Plan

- If the proposed project is critical to your operations, please discuss what contingency plans could be put into place in the event that the project or its end outcomes are not successful.



PM101 – Sample Proposal

Title: "Discovery Day" by the Monroe Township Public Library:

Description:

- A day for patrons to come and discover a new skill such as how to make coffee using a French press or how to sew on a button, etc. We will have different “skill stations” throughout the library



PM101 – Q&A

