Project Management Skills for the Accidental Project Manager
Project Management Terms

**Project Plan**

- Life Cycle
- Schedule of Activities
- Tasks
- Duration
- Dependencies
- Resources
- Timeline
- Budget

- Outlines the deliverables and the deadline and defines your approach
- Identifies who’s on the team
- Should include milestones
- Has multiple components
Project Management Terms

- **Life Cycle**
  - Path your project takes from beginning to end
  - Includes various phases: initiation, planning, execution, monitoring, control and closure

Other terms:
- Project Plan
- Schedule of Activities
- Tasks
- Duration
- Dependencies
- Resources
- Timeline
- Budget
Schedule of Activities

- List of everything that needs to be done
- Consider what you need from start to finish
- Prioritize the things on this list
Project Management Terms

- Project Plan
- Life Cycle
- Schedule of Activities

**Tasks**

- Small jobs that make up the larger project
- Completed in incremental steps
- Take into account the resources needed

Duration
Dependencies
Resources
Timeline
Budget
Project Management Terms

- **Duration**
  - The time you believe each task will last
  - Calculated after considering resources
  - Who will perform the task and their availability

- Project Plan
- Life Cycle
- Schedule of Activities
- Tasks
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- Resources
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- Budget
Project Management Terms

-项目计划
-生命周期
-活动计划
-任务
-持续时间
-资源
-时间线
-预算

**Dependencies**

- 任务依赖于其他任务的完成
- 将这些依赖项连接起来，并设置通知
- 帮助保持项目的进度

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## Project Management Terms

- **Project Plan**
- **Life Cycle**
- **Schedule of Activities**
- **Tasks**
- **Duration**
- **Dependencies**
- **Resources**
- **Timeline**
- **Budget**

### Resources

- **The things you need** to do the project
- Can include the **people** on your project team, the **equipment** and even the **project management software** you’ll use
Project Management Terms

- **Project Plan**
- **Life Cycle**
- **Schedule of Activities**
- **Tasks**
- **Duration**
- **Dependencies**
- **Resources**
- **Timeline**
- **Budget**

- **Visual overview** of your project
- Helps you determine your **workloads**
- Will **need to be revised** if the project scope or priorities change
Budget

- The realistic costs to complete the project
- Usually needs approval
- Is usually a range
Phase One: **Project Initiation**
Initial Research

- Reason for the project
  - Lays the foundation

- Make a business case
  - Analyze the business climate, objectives, scope and constraints
  - Include assumptions, expected costs and risks

- Some projects require a feasibility study
  - Investigate other solutions
  - Dig deeper into the business problem
What Is a **Project Charter**?

- Authorizes a project and lays out the vision
- Clarifies expectations and explains the plan

**Gives an overview**

- Scope
- Objectives
- Risks

**Includes**

- Project team members
- Project manager
- Authority of the project manager
The important thing is to talk to stakeholders.

- Understand motivations
- Capture the assumptions and risks
- Provide a common starting point
- Involves discussion and negotiation
- Involves various tradeoffs
Identify the Stakeholders

- Customers
- Senior Managers
- Team Members

Anyone who can impact or be impacted by the project
During This Stage:

• Perform a stakeholder analysis
  – Capture input and desired outcomes

• Create a stakeholder register
  – Team members can see who is driving which requirements
Create a **Summary**

- How did the project originate and why is it being done?
- What are the statutory requirements, if any?
- How does it fit into the overall goals of your organization?
- What is the thinking behind it?
- Precisely what is to be accomplished through the project?
- What will change?
- How much will XYZ improve?
- How much time will it take, what will it cost and how many resources will be needed?
A project summary can be used to **prioritize this project** in regards to other projects.
“If you fail to plan, you plan to fail.”
Phase Two: **Planning**

- **Feedback**
- **Deliverables**
- **Milestones**
- **Deadline**
- **Roles**
- **Team members**

**Project Plan**
Determining the **Project Scope**
Scope summarizes the work needed to make the project a success.

Establishing objectives

- **S**: Specific
- **M**: Measurable
- **A**: Achievable
- **R**: Relevant
- **T**: Time-bound
• **Agreement** from all stakeholders is critical to defining success.

• The project scope should clearly state **what is and what is not** included in the project.

• An accurate scope requires **clarity and precision**.
Identify **Milestones**

Break down the larger project into more manageable pieces.

Quantify **Your Effort**

How much of each resource will you need?
Allocating the **Resources**

- Assemble Teams
- Vendors, etc…
- Organize the Parts
- Make a Schedule
- Get Project Planning Tools
What defines the **beginning of the project?**

- Document Everything
- Automate Tasks With Alerts
- List Dependencies
- Mark the Different Phases
- Put the Data on a Timeline
Prioritize...when everything seems urgent.
Six Steps to **Prioritize Projects**

- Create a list of all your tasks.
- Identify urgent versus important.
- Identify what offers the highest value to your organization.
Six Steps to **Prioritize Projects**

- Order tasks by estimated effort.
- Be flexible and adaptable.
- Know when to cut.
Be proactive, not reactive.
Finish Your Project **On Time** and **On Budget**

Know your team’s **strengths** and **weaknesses**.

Evaluate each team member’s skill set, carefully selecting the right talent.
Finish Your Project **On Time** and **On Budget**

A budget is not a conjecture or a guess.

Successful projects that finish within budget have a clearly defined scope ahead of the project launch.
Set goals with realistic timelines.

Break the project down into smaller more manageable tasks with due dates attached to each one.
Finish Your Project **On Time and On Budget**

Make sure your team understands *schedules and deadlines* before the launch.

Involve your team members *early in the planning process.*
Finish Your Project On Time and On Budget

Use collaboration tools.

Use project management tools as centralized communication tools for your team.
Finish Your Project **On Time and On Budget**

Communicate, communicate, communicate.

Be approachable for your team’s questions and concerns. Acknowledge work that is well done.
Finish Your Project **On Time and On Budget**

Know your **red flags** and be on the **lookout for them**.

Be proactive enough to **notice when things are getting off track** and adjust accordingly.
Finish Your Project **On Time** and **On Budget**

Take the time to **celebrate milestones**.

When the members of your team feel appreciated, productivity will soar.
Finish Your Project **On Time** and **On Budget**

**Acknowledge your team** for what they’re doing.

Remember, you picked this team for a reason and they’re more than capable of completing their assignments.
Finish Your Project **On Time and On Budget**

Have **contingency plans**.

Having a contingency plan for each phase and milestone is the best way to ensure success.
Work Breakdown Structure (WBS)

- Descending levels of increasing detail about the project deliverables

- First step in creating your WBS:
  - State the project
  - Identify the major set of subprojects or milestone tasks
  - Identify key activities for each subproject or milestone
Organize Your **WBS** by Functional Area

```
Project

Task 1
  - Task 1.1
  - Task 1.2

Task 2
  - Task 2.1
  - Task 2.2

Task 3
  - Task 3.1
  - Task 3.2
```
The **Sticky Note** Method

- Bring the entire team into a **task-brainstorming meeting**.
- Provide each team member with **sticky notes**.
- Explain the project **vision and scope**.
- Try to group those present **according to their responsibility**.
- Ask them to write **all the tasks required to complete the project** on separate sticky notes.
The **Sticky Note** Method

- On a large wall, have them **list the functions** under each outcome or subproject.
- When the list is compiled, you can begin to **view the tasks graphically**.
- **Move the tasks around** as much as necessary according to any dependencies.
- These tasks will become the basis for **creating your schedule** and budgeting requirements.
Anticipate Project **Bottlenecks** and **Problems**
Identify and Analyze the Impact of Various Risks and Develop a Plan

Meet with your project team.

Write potential risks on sticky notes.

Have groups brainstorm additional risks.
Risk Mapping

**Likelihood**

Low

Medium

High

**Impact**

Critical

Significant

Low
Recognize and Root Out **Project Waste**

Money  
Time  
Resources
7 types of waste that can be found in a project:

Over-Production
Producing more product or services than is needed faster than it is needed, or before it is needed.
7 types of waste that can be found in a project:

**Wait Time**
Unnecessary waiting for the tasks to be completed, materials to be delivered, etc.
7 types of waste that can be found in a project:

Transportation
The movement of materials that does not directly support production.
7 types of waste that can be found in a project:

**Motion**

Employee movement that is not value-added.
7 types of waste that can be found in a project:

**Inventory**
Excess material that does not meet “just in time” (JIT) requirements.
7 types of waste that can be found in a project:

- **Defect**: Repair of a product to meet customer needs.
7 types of waste that can be found in a project:

**Process**
Redundant work that does not add value.
Online Project Management (PM) Tools

• Creating your project plan is easy and efficient
• Many require little to no training
• Many are low cost
• Easy to share the project plan and assign tasks
• Real-time data on the project
PERT — Project Evaluation and Review Technique

• A way analyze the tasks used to complete projects
• Used to identify the minimum time needed to complete an activity
• Allows you to analyze uncertainty in activity completion times by determining best-case and worst-case scenarios
# PERT Example

## PERT Estimate Equation

\[ Te = To + [4 \times Tm] + Tp \]

<table>
<thead>
<tr>
<th>SUBUNIT OR STEP</th>
<th>To</th>
<th>Tm</th>
<th>Tp</th>
<th>Te</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 1</td>
<td>7 days</td>
<td>10 days</td>
<td>25 days</td>
<td><strong>12 days</strong></td>
</tr>
<tr>
<td>Review current manual for changes.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Legend**

- **To**: Time optimistic
- **Tm**: Time most likely
- **Tp**: Time pessimistic
- **Te**: Time expected
**CPM—Critical Path Method**

- Helps you complete projects by identifying key tasks
- Consists of multiple paths
- **Slack** is the extra time available to complete noncritical tasks
- **Float** are tasks that can be delayed without having an impact on the deadline
# Gantt Chart

<table>
<thead>
<tr>
<th>TASK</th>
<th>WEEK 1</th>
<th>WEEK 2</th>
<th>WEEK 3</th>
<th>WEEK 4</th>
<th>WEEK 5</th>
<th>WEEK 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Needs analysis</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Choose computer</td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choose software</td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make purchases</td>
<td></td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Install software</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Provide training</td>
<td></td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Gantt Chart

- The start and end dates
- The project tasks and who is working on each
- When tasks will start and finish
- How task groups work together
Gantt Chart

- Thinking through all of the tasks involved
- Calculating the minimum time needed
- Showing the relationship of tasks in a project
- Identifying essential tasks
Task Dependencies

**FS**
Finish-to-Start

Can’t start before a previous and related task is finished

Can start later

You have to buy land before you can start building.

**SS**
Start-to-Start

Can’t start until a preceding task starts

Can start later

Road excavating must start before asphalt can be laid.
Task Dependencies

**FF**

Finish-to-Finish

- Can't end before a preceding tasks ends
- Can end later
- Asphalt must be complete before painting lines can be completed.

**SF**

Start-to-Finish

- Very rare
Input activities into software or a template

Chart progress and reflect changes as soon as they occur
Set **checkpoints.**
It can seem like taking the time to do a report isn’t important. **However...**

…reporting is helpful when a **project is off track.**

…reporting is the only thing that can **prevent absolute project failure.**
How to Make Your Reports More Effective

- May concern performance, schedule or costs
- Should be as brief as possible
- Should always be targeted
- Don’t circulate to too many recipients
- Add visuals to help with understanding
- What will be most beneficial to you and your team
- Choose the type of report that best suits your needs
Reports **can** tell you about:

- Recorded information
- Successes and failures
- How the team is keeping track of project tasks
- How the program progresses and develops
- How to determine further action to use for evaluation
- How actions should result from a report

Reports **cannot** tell you about:

- The accuracy of the information
Effective Communication
Meets the needs of both teams and stakeholders without over-communicating.

Communication factors to consider:

- Project Environment
- Internal and External
- Formal and Informal
- Sensitivity or Confidentiality
- Official and Unofficial
- Ease of Use
- Availability of Technology
- Urgency
Communication With Stakeholders

• Manage their perceptions
• Keep expectations realistic
• Continued buy-in
• Minimize conflicts
Communication With the Team

• Keep everyone moving in the **same direction**
• Working toward common **deadlines, budgets** and **objectives**
• Creating a **motivating environment**
Motivation Killers

- Lack of Challenging Work or Variety
- Lack of Opportunity for Achievement
- Little Recognition
- Lack of Belonging
- No Real Sense of Purpose
- Personal Problems
- Work Ethic Is Not Valued
- Poor Communication
- Unclear Goals or None at All
- No Empowerment
- Creativity Is Discouraged
- Threatened for Making Mistakes
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