



Project Management 101
The Castaways

Schedule

Agenda	Time	Notes
Introduction	1230pm	Trainer + Workshop Format
Starting a Project	1240pm	Scenario (Project Charter)
Getting Organized	1pm	Scenario (WBS)
Getting Organized	145pm	Scenario (Activity List)
Performing the Work	230	Demo (Critical Path)
Monitoring Progress	3pm	
Wrapping Up	330pm	Demo (Lessons Learned)
Workshop Conclusion	345	Project Proposal
Final Q&A	4pm	Conclusion



Intro: The Castaway Experience

- Your Goal is to get off the Island!
- Use Project Management concepts, tools and frameworks (PMI)
- Look around, the people in this room can help you
- *More facilitated and guided pace for today



About Sam

- Published Author + Technologist
- Trainer of Tech + PMP for over 15 years
- Work @ SaaS industry in NYC, manage a global team
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Logistics

5 Sections

- Starting a Project
- Getting Organized
- Performing the Work
- Monitoring Progress
- Wrapping Up

4 Scenario Exercises

- 5-10 minutes to read
- Guided Brainstorming Session
- Enjoy the exercises!



Logistics

- Handouts – Reference + Review after Class
- Course Site: <http://www.samsena.com/PM-101>
- Sample Documents
 - Charter Template
 - Communication Action Plan
 - Project Schedule
 - Responsibility Assignment Matrix
 - Kickoff Sample Agenda
 - Lessons Learned
- Links to Additional Courseware



SCENARIO 1: Project Charter



Intro: The Castaway Experience

We go through a scenario of a group of castaways who were shipwrecked on island in the middle of the Atlantic. After an encounter with island natives, the group is faced with the daunting task of escaping the island before a massive volcano erupts, flattening the island and all its inhabitants. You must leverage project management skills and techniques to overcome obstacles and escape from the island.



Starting the project

Project

- Temporary in nature
- Has a unique Product, Service or Result
- Coordinated undertaking of interrelated activities

Business Need

- What is driving the need to embark on this project?

Project Justification

- *Business Case- On what financial or other basis can we justify doing this project?*
- *Tools: Cost/Benefit Analysis, Key Metrics*

Product Description/Deliverables

- *A tangible thing that results from the completion of the project*
- Could be
 - A Product
 - A Service
 - An improvement initiative
 - A result or decision



Starting the project

Stakeholders

- People who will affect or be affected by the outcome of a project

Constraints

- Factors that might restrict a team's options and typically are imposed externally on the project or team. Examples: Budgets and Deadlines

Assumptions

- Factors that for planning purposes might be considered to be true, real or certain

- Signoff

- Formal endorsement of the Project by Management
- Establishes the identity of the Project Manager & Team



SCENARIO 2: WBS

Getting Organized - Scope

The Triple Constraint

- Three fundamental forces imposed on a project
 - Time
 - Cost
 - Scope

Scope Statement (Extension of the Project Charter)

- Contents
 - Project Scope Description
 - Acceptance Criteria: What must be completed in order for the project to be considered a success
 - Deliverables
 - Exclusions
 - Constraints & Assumptions



Getting Organized - 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?)



SCENARIO 3: Activity Definition + Milestones

Getting Organized – Time and Cost

What you will learn:

- Activity List and Duration Estimates
- Cost Estimates
- Assembling the team
- Scheduling work

Exercise: Activity List and Sequencing



Getting Organized – Time and Cost

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

- How long does an Activity Take
- PERT Estimates (Great if you have a lot of Data!)
 - Pessimistic: Worst Case Scenario
 - Most Likely: Based on prior experience
 - Optimistic: If everything goes well
- Benchmarking

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



Getting Organized – Time and Cost

Milestones

- An activity of zero duration
- Identified as being significant in the project
 - End of a phase or task
 - Delivery of a work result
 - Expenditure of a certain amount of money



Getting Organized

Cost Estimates

Estimate Type	Characteristics
Top-Down (Budgetary Estimates)	Benchmarking: Refer to reference projects, vendor estimates Short time to assemble Lower Accuracy
Bottom-Up (Detailed Estimates)	Detailed Estimates Longer time to assemble Higher Accuracy

Building the Team

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



Getting Organized – Time and Cost

Activity Sequencing

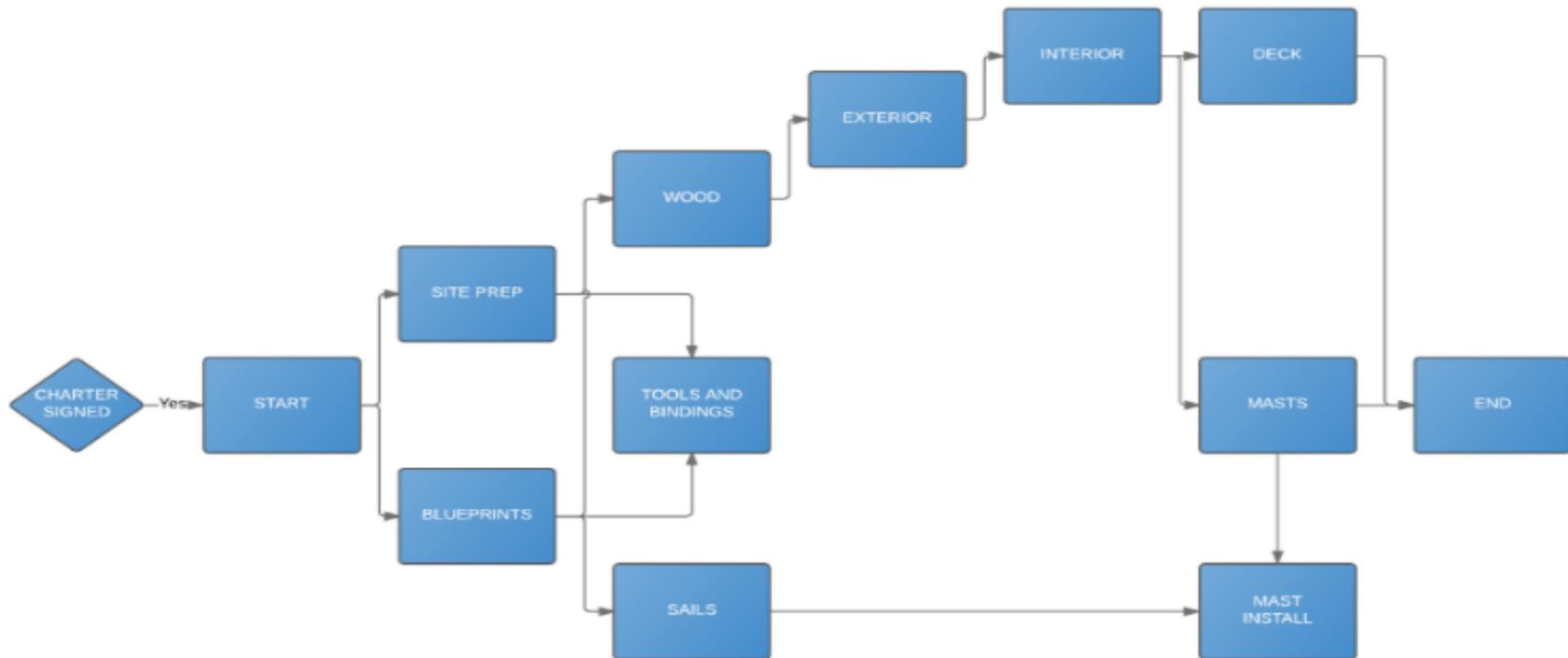
- Correct sequence of performing activities now that they have been defined
- Dependencies
 - **Mandatory:** A physical or technological limitation of the work (Must do A before B)
 - **Discretionary:** Historical/Organizational Preference

Network Diagrams

- Depicts activities the relationship and dependencies between the activities



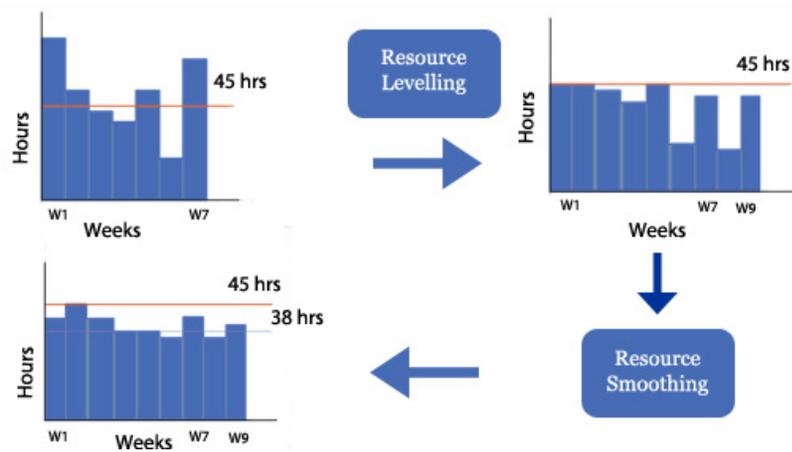
Getting Organized – Network Diagram



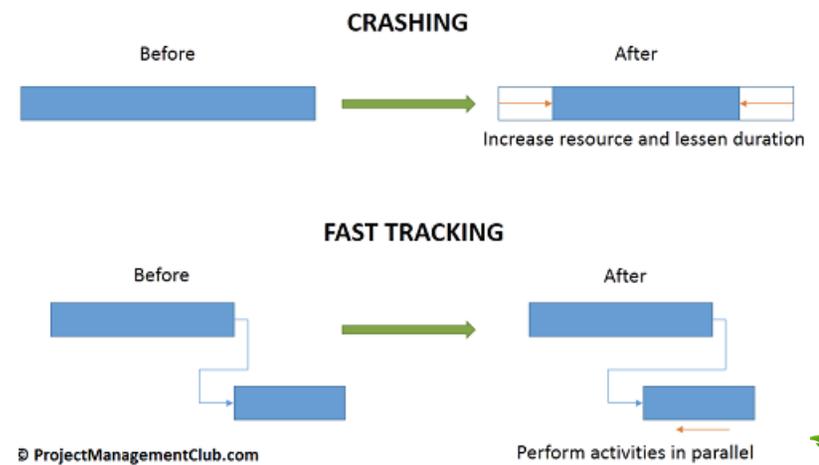
Optimization Techniques

Resource Leveling

Vertical Bars ~ Hours worked a day



Crashing & Fast Tracking



SCENARIO 4: Critical Path (DEMO)

Performing the Work

- What you will learn:
 - The Kickoff Meeting
 - Task Assignment
 - Managing Conflict
- *Handout: Kickoff Meeting sample agenda*



Performing the Work

The Kickoff Meeting

- *Goals*
 - *Get everyone aligned on the Project, it's goals and objectives*
 - *Formally establish the role of the PM*
- *Sample Agenda:*
 - *Introduction*
 - *Review of Project Charter*
 - *Establish PM Standards*
 - *Introduce Project team members*
 - *Establish Project Communications Needs*



Performing the Work

Assigning Work

- Work Authorization System:
 - Formal approval of the work by relevant authorities
 - Formal approval of the vendor or individual performing the work
 - Detailed description of task, including success requirements and required skills
- Resource Assignment Matrix

WBS Element	Project Team Members (Castaways)				Other Stakeholders (Natives)			
	Glenn	Phil	Fernando	Daniel	Chief LGOH	Big T	Sail Production	Natives
1.1.1 Activity A	N			R	A		N	
1.1.2 Activity B		C	S		N	S		
1.1.3 Activity C	R		R					N
2.1.1 Activity D		C		R	A			
2.1.2 Activity E	R		S			S		N
Key: R= Responsible S = Support Required C = Makes Decision N = Must be Notified A = Approval Required								



Performing the Work

Managing Conflict - Team Building

- *Interdependence of Team Members*
- *Common Consensus*
- *Group Work Commitment*
- *Accountable as a Functional Unit*
- *Acknowledgement of Conflict*



Monitoring Progress

- What you will learn:
 - Project Baselines
 - Status Reporting
 - Change Management
- *Handout: Story + RAG Report sample*
- *Exercise: Risk Assessment*



Monitoring Progress

- Status Meetings
 - *Lasts less than an hour*
 - *Goes through ongoing project tasks*
 - *Methodical and organized format.*
 - *Agenda:*
 - *Summary of Status*
 - *Open Action Items*
 - *Open Risks and Issues*
 - *Closing the meeting*
- Sample RAG Report (Red Amber Green)



Monitoring Progress

Change Management

- Change can be positive!
- Change Control Boards
 - A formal process should be adopted by an organization to manage changes
 - A change request should be made whenever change has the possibility of affecting the scope/schedule/resources of the project
- Change Control Boards
 - Formal committee with various approvers
 - Only approved changes allowed



Wrapping Up

- What you will learn:
 - Project Closeout
 - Project Sign-off
 - Lessons Learned
- *Handout: Story + RAG Report sample*
- *Exercise: Lessons Learned*



Wrapping Up

Closeout

- When: Completion of Deliverables/Phases/Milestones
- How: Evaluation Criteria
- Who: Sponsor/Owner Signoff

Contract Administration

- Product Specification
- Delivery schedule
- Handling of changes
- Warranties
- Inspections
- Subcontracts

Lessons Learned



Wrapping Up

Lessons Learned

- Documenting anything that the project team learned during the project or a project phase that may benefit subsequent phases or project teams in the organization.
- Documented and kept in a centralized repository where it can be accessed by other users and readily accessible
- Organization is doomed to repeat the same mistakes unless it can find a way to document these lessons and transmit them to others who can benefit in the future.
- Do not wait too long to do this!



Knowledge Recap

The Charter	Document your Deliverables and Signoff Constraints > Imposed on the Project Assumptions > Write them down!
The WBS	Decomposition – That’s breaking things down The WBS elements
Time and Cost	Activity definition Activity Sequencing Task dependencies (Start to Finish, Finish to Start etc.)
Kicking Off	Kick off meeting Resource Leveling Risk Identification
Monitoring Progress	Project Cadence is everything Measure against your baselines Use Change Management to prevent scope creep
Wrapping Up	Document Lessons learned quickly Obtain signoff, then move on



What's next?

- Your Next Project
 - Project Proposal
 - Summary (or problem statement or background)
 - Project scope
 - Stake holders including project manager and team
 - Timeline
 - Cost
 - Expected outcome
 - Benefits realized by the project



Conclusion

- Class Evaluations (Please take a minute to fill in)
- Additional Resources:
 - Website link to download: www.samsena.com/pm-101/
- Coming Soon!
 - Castaways book
 - More PM content
 - More exercises

