

# *Project Management for Business and for Life*

## **2009 Four Corners Professional Development Conference**



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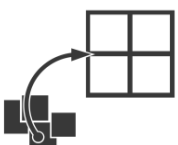

*Project Management for  
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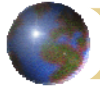
Chris Hunter, MBA and Principal  
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*About Your Facilitator -- Chris Hunter*

- MBA & Principal of Cornerstone Business Solutions
  - 20-years corporate finance and operations experience with Fortune 500 domestic and international energy and personal services companies
  - MBA from the R. O. Anderson Graduate School of Management, University of New Mexico. B.S. Business Administration from William Jewell College, Liberty, MO.



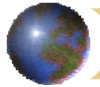


## *About Your Facilitator -- Chris Hunter*

Founder and principal of Cornerstone Business Solutions LLC – a leading Four Corners business development practice.

Further information and a copy of today's presentation is found on the company's award-winning web site

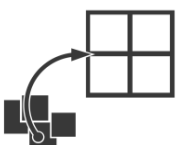
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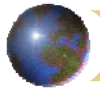


## *Project Management Seminar Outline*

1. Understanding the Basics
2. Planning a Project
3. Implementing a Plan
4. Monitoring Performance
5. Calling it Done and the Lessons Learned

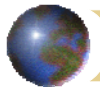
Portions derived from the book Project Management by Andy Bruce and Ken Langdon



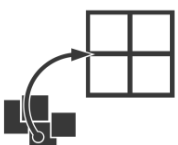


## *Top-Three “Take Aways”*

1. Project management is disciplined work
2. We have access to great tools and can use them more often and better
3. Improving project management skills is invaluable to moving ahead in the direction and pace you desire for your business and personal life



## *1. Understanding the Basics*





## *What is Project Management?*

Project management is a disciplined set of skills and actions that provide individuals and teams with the structure, focus, flexibility and control needed to successfully achieve results.

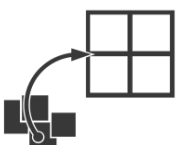
1. Understanding the Basics




## *Why Bother with Project Management?*

Understanding what's involved with running a project significantly improves the likelihood of your personal success and that of your team and organization.


1. Understanding the Basics






## What is a Project?

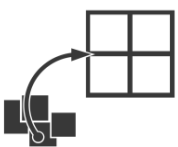
1. A project is a series of activities designed to achieve a specific outcome within a set timeframe and budget.
  
2. Projects *are not* routine, everyday activities although a project could involve reengineering a routine task(s).




1. Understanding the Basics



Identifying the Key Features of Projects	
Features	Points to Note
<b>Defined Start and End</b> All projects have start up and closure stages	<ul style="list-style-type: none"> <li>● Some projects are repeated often, but they are not processes because they have clear start and end points</li> <li>● Routine work can be distinguished from projects because it is recurring and there is no clear end to the process</li> </ul>
<b>Organized Plan</b> A planned, methodical approach is used to set project objectives	<ul style="list-style-type: none"> <li>● Good planning ensures a project is completed on time and within budget; having delivered the expected results.</li> <li>● An effective plan provides a template that guides the project and details the work that needs to be done.</li> </ul>
<b>Separate Resources</b> Projects are allocated by time, people and money on their own merits	<ul style="list-style-type: none"> <li>● Some projects operate outside the normal routine, others within it – but they all require separate resources</li> <li>● Working within agreed resources is vital to success</li> </ul>
<b>Teamwork</b> Projects usually require a team of people to get the job done	<ul style="list-style-type: none"> <li>● Project teams take responsibility for and gain satisfaction from their own objectives, while contributing to the success of the organization as a whole</li> <li>● Projects offer new experiences and challenges for the staff</li> </ul>
<b>Established Goals</b> Projects bring results in terms of objective and measurable quality and/or performance goals	<ul style="list-style-type: none"> <li>● A project often results in a new way of working or creates something that did not previously exist</li> <li>● Objectives must be identified for all those involved in the project</li> </ul>






## *Building the Project Team*

- Draw up a list of people that may help you and think about the "WIIFM" (What's In It For Me) from their perspective
- Build rapport with the project's main stakeholders prior to project initiation
- Make sure the core team consists of people you really trust

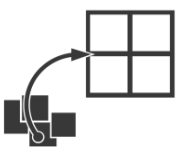
1. Understanding the Basics



## *The Key Players in a Project*

Sponsor	Project Manager	Stakeholder
Key Team Member	Team Member	Customer
Supplier		

1. Understanding the Basics






### *The Key Roles Defined . . .*

- **Sponsor** – initiates, adds to the team’s authority and is the most senior team member
- **Project Manager** – Responsible for achieving overall project objectives and leading the team
- **Stakeholder** – Any other interested party interested in or affected by the project outcome

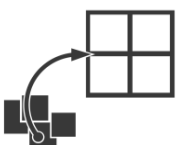

1. Understanding the Basics



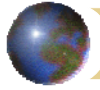
### *The Key Roles Defined . . .*

- **Key Team Member** – Assists the project manager and provides the breadth of knowledge needed
- **Team Member** – Full or part-time person who has specialized actions to carry out in the project plan
- **Customer** – Internal or external person who directly benefits from completion of the project
- **Supplier** – Provider of materials or services needed to carry out the project

1. Understanding the Basics



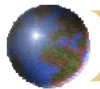




## *Use an Organizational Chart*

- As contrasted to a simple list of names, the roles, interconnectivity and dependencies of your team are often best understood and most quickly communicated in the visual terms of an organizational chart
- MS PowerPoint 2007 demonstration
- MS Visio 2007 demonstration

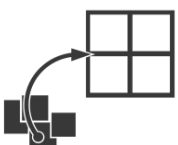
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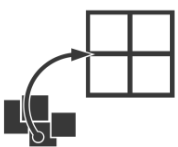
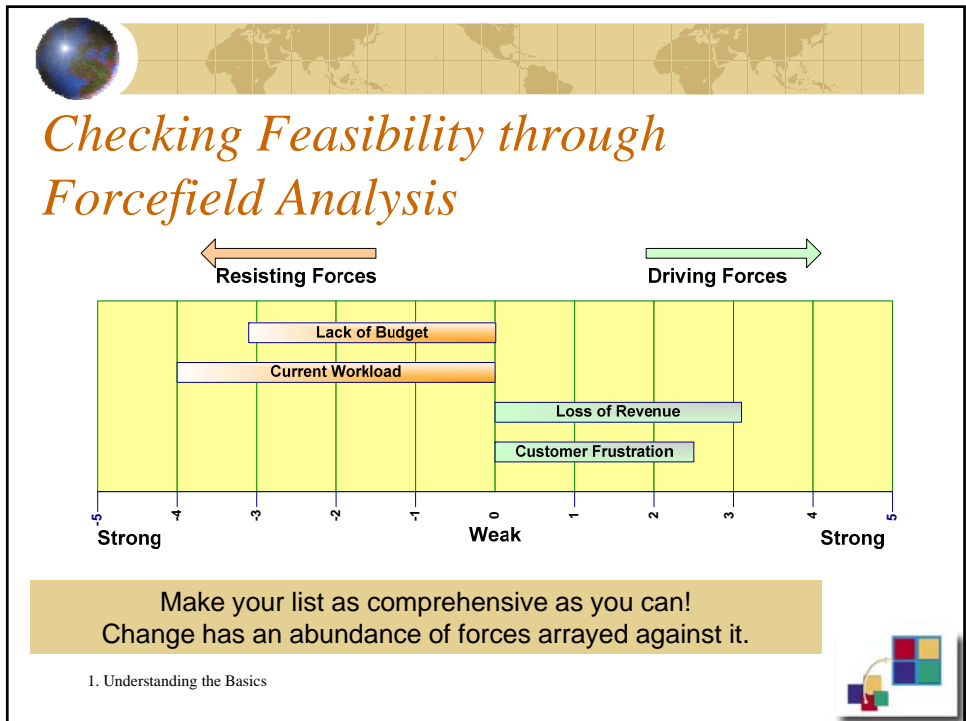



## *With the Team, Define the Project Stages*

- Five Stages to Any Project
  1. Initiation
  2. Planning
  3. Motivating
  4. Monitoring
  5. Closing



1. Understanding the Basics







## *2. Planning a Project*



## *Defining the Vision*

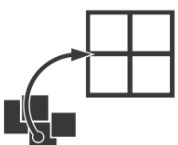

**"Begin with the end in mind."**


Habit Two of Stephen R. Covey's Seven Habits of Highly Effective People

Check at this stage that the vision is clearly worth attaining.

Measure twice, cut once.

2. Planning a Project







## Defining the Vision – Do's & Don'ts

- Do's
  - Do not compromise on the "ideal" if that's what it takes to arrive at the vision. ***The enemy of the good is the perfect.***
  - Do make the vision statement explain why the project is needed. ***State the payoff!***
- Don'ts
  - Don't ignore obstacles at this stage – they may prove to be major stumbling blocks.
  - Don't involve too many people this early in the process. ***Too many cooks spoil the broth!***

2. Planning a Project

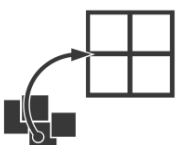




## Defining the Vision

Where there is no vision, the people perish.

Proverbs 29:18

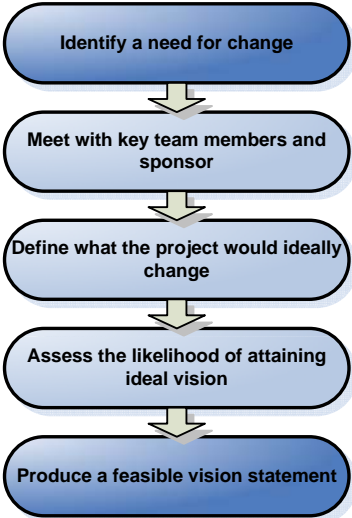
2. Planning a Project







## *Vision Development* *Visualized*

Front-end agreement on vision and its WIIFM among all parties is your project's greatest single hope for success.



```
graph TD; A[Identify a need for change] --> B[Meet with key team members and sponsor]; B --> C[Define what the project would ideally change]; C --> D[Assess the likelihood of attaining ideal vision]; D --> E[Produce a feasible vision statement];
```

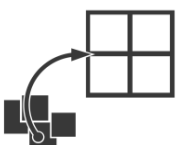

2. Planning a Project




## *Setting Objectives*


- Objectives are the mile markers we use to determine momentum
- Objectives should always be appropriate for the whole organization, not just your own area or department
- Targets are easier to identify if you discuss them with others – especially your customers

2. Planning a Project







## Setting Objectives



- Ideal Objectives are:
  - Unambiguous
  - Observable
  - Objective
  - Directly relevant to achieving the vision

2. Planning a Project

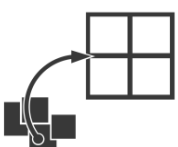
## Deciding on Project Emphasis


Objective	Indicator	P	Current	Target
Improve sales on non-standard products	Increase volume of orders	10	\$5,000 annually	\$7,500 annually
Improve the speed of decision making	Reduce time taken to respond to a customer request for a quotation	8	8 weeks	4 weeks within 3 months of project completion
Improve efficiency of preparing customer quotations	(a) Reduce time spent on preparing quotations (b) Cut number of days spent on credit approval process	6	(a) 4 days per month (b) 5 days	(a) 2 days per month (b) 2 days
Improve management accountability for proposals	Make a single manager accountable for producing each customer proposal	6	Not done	In place

Objective indicators that determine progress

Current level of performance

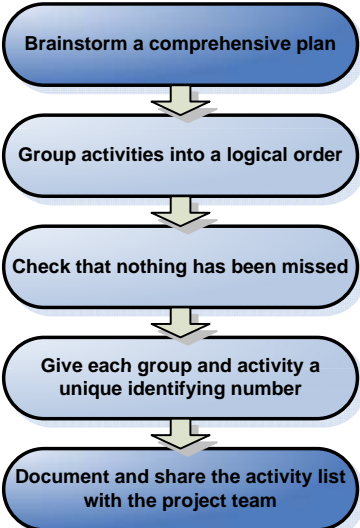
Desired level of performance







## *Listing Activities Visualized*

- List all activities needed to achieve objectives and divide them into groups to make it easier to assess what must be done, when and by whom.
- Be comprehensive!
- Refinement can come later.



```
graph TD; A[Brainstorm a comprehensive plan] --> B[Group activities into a logical order]; B --> C[Check that nothing has been missed]; C --> D[Give each group and activity a unique identifying number]; D --> E[Document and share the activity list with the project team];
```

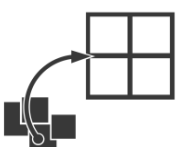
2. Planning a Project




## *What a Sample Activity List Looks Like*

- 1. Conduct Analysis**
  - 1.1. Interview customer representatives
  - 1.2. Consolidate findings into a report
  - 1.3. Present report to board
- 2. Complete Product Design**
  - 2.1. Take first draft to representative customers
  - 2.2. Amend to answer customer comments
  - 2.3. Gain top level agreement to design
- 3. Arrange logistics**
  - 3.1. Order materials
  - 3.2. Train personnel
  - 3.3. Engage subcontractors

2. Planning a Project







## Ordering Activity Sequence

- Not all activities can or need start simultaneously to meet a project's planned completion date
- Put activities into a logical sequence
- Estimate each activities' duration including the start and end dates

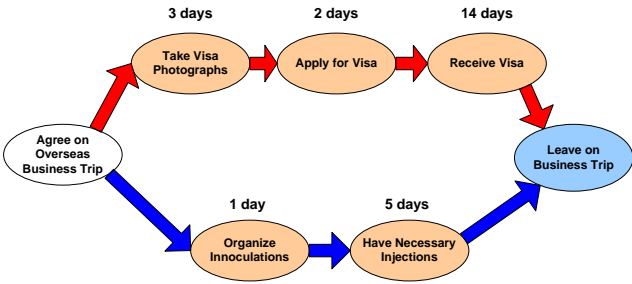
2. Planning a Project



## The Critical Path Diagram

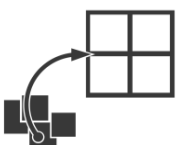

○ Activities that can be undertaken simultaneously → Critical path (minimum duration 19 days)

○ Activities that can only start once previous activities are complete → Non critical path (minimum duration 6 days)



The longest route is the critical path which shows the shortest possible duration for the project. Critical path tasks must have top focus or project will be delayed.

2. Planning a Project







## Calendar Management – The Gantt Chart

The project management tool that built Hoover dam and the U.S. interstate highway network.

ID	Task Name	Start	Finish	Duration	Oct 2007		Nov 2007				Dec 2007	
					9/23	10/7	10/14	10/21	10/28	11/4	11/11	11/18
1	Planning	10/11/2007	10/31/2007	3w								
2	Research	10/19/2007	11/28/2007	5w 4d								
3	Writing	10/25/2007	11/20/2007	3w 4d								
4	Design	11/1/2007	12/6/2007	5w 1d								
5	Editing	11/23/2007	12/13/2007	3w								
6	Production	11/22/2007	2/7/2008	11w 1d								

[www.ganttchart.com](http://www.ganttchart.com)

2. Planning a Project

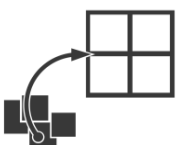



## The Demonstrated Power of MS Visio 2007

- Gantt Charts
- Timelines
- Calendars





2. Planning a Project






## *3. Implementing a Plan*

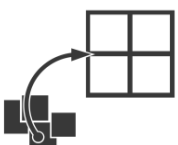





## *Implementing a Plan*

- People are key to making a project plan work.
- Begin by assessing your skills as a project manager and as a manager of people
- See the Project Management Skills Assessment [tool](#)




3. Implementing a Plan








## *Management Assessment Questions*




1. Are you willing to stay with the project for its entire term?
2. Are you interested in developing people and helping them to become leaders?
3. Do you have a real interest in working on the project?
4. Can you delegate objectives to the team as well as tasks?

3. Implementing a Plan

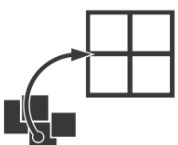



## *Management Assessment Questions*

5. How much do I know about a potential team member and do I trust him/her?
6. Will I be able to work comfortably with him/her?
7. Am I confident that all the team members will get along with one another?
8. Does the prospective team member have the necessary skills or will training be required?



3. Implementing a Plan





## *Be Stylistically Deliberate . . .*

Choosing a Leadership Style	
<b>Dictatorial</b> Making decisions alone, taking risks, being autocratic and controlling	This style may be appropriate if the project faces a crisis or there is no time to consult. However, since it discourages teamwork it should be used sparingly.
<b>Analytical</b> Gathering of the facts, observing and analyzing before reaching decisions	This style, which requires strong analytical skills, may be used when a project is under time pressure or threat and the right decisions must be made quickly.
<b>Opinion-Seeking</b> Asking opinions from the team on which to base decisions	Use this style to build team confidence and show you value people's views as well as to impress stakeholders who enjoy being consulted
<b>Democratic</b> Encouraging team participation and involvement in decision-making	This is an essential style to be used on a regular basis to empower team members and help strengthen their commitment to a project

3. Implementing a Plan

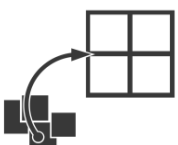


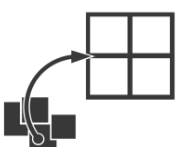
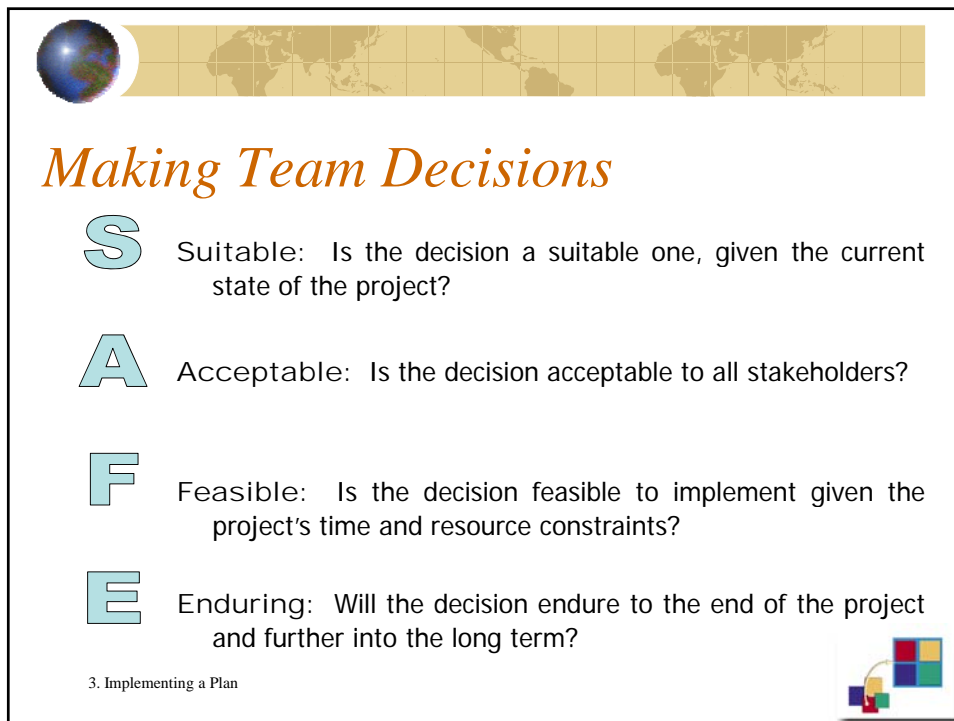
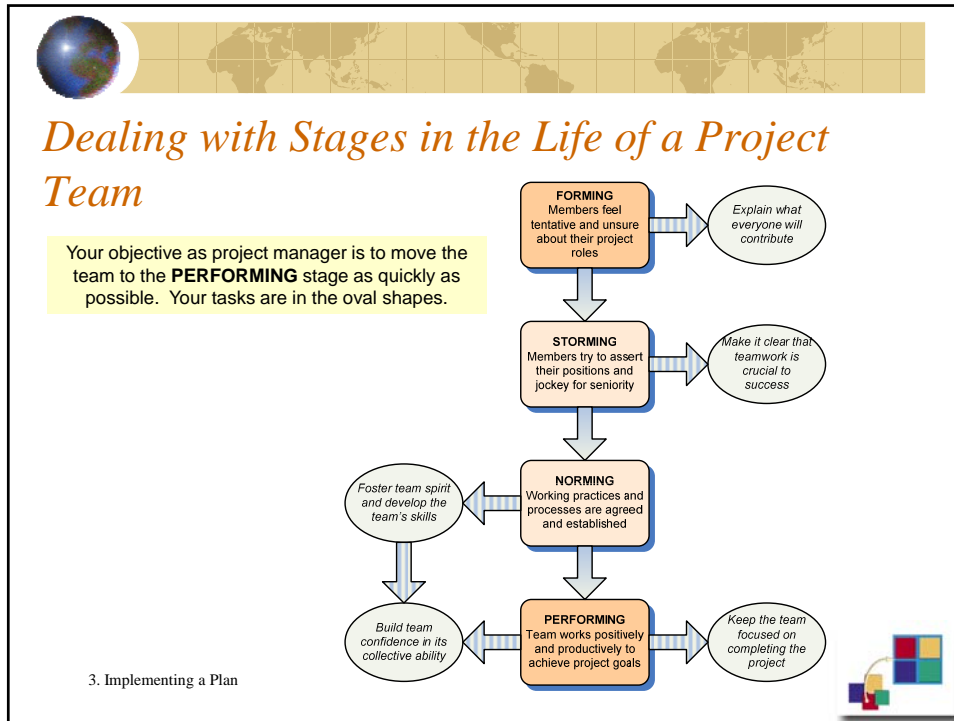
## *Exercising Project Leadership Skills*

To lead a team you must:

1. Ensure everyone is working toward agreed, shared objectives
2. Continuously monitor activities
3. Criticize constructively and praise good work
4. Always insist on the highest standards of execution
5. Continuously develop the individual and collective skills of the team


3. Implementing a Plan





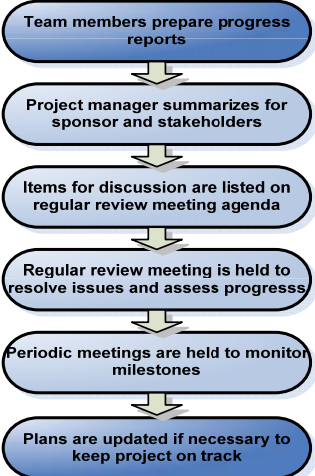


## 4. *Monitoring Performance*



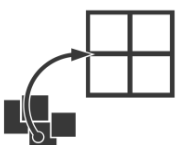

### *What is the Monitoring Process?*

- Monitoring is closely equated with control
- Lack of control is closely equated with chaos
- Chaos is closely equated with project failure



```
graph TD; A[Team members prepare progress reports] --> B[Project manager summarizes for sponsor and stakeholders]; B --> C[Items for discussion are listed on regular review meeting agenda]; C --> D[Regular review meeting is held to resolve issues and assess progress]; D --> E[Periodic meetings are held to monitor milestones]; E --> F[Plans are updated if necessary to keep project on track];
```

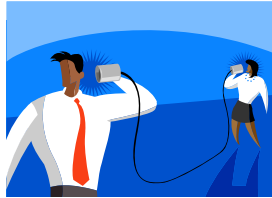
4. Monitoring Performance





## *Project Communication Strategy*

- The better the communication, the smoother the project flow
- Make sure all team members have easy access to project information – lever your technology
- Create a project team communication directory and distribute it early and often
- Encourage two-way communication and actively solicit feedback



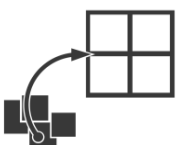
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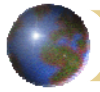


## *Smart Two-Way Questions*

1. "How do you think we could improve the way we are working on this project?"
2. "How are customers reacting to the work we are doing – are they satisfied?"
3. "Having completed that activity, is there anything you would change if you had to do it again?"
4. "Are you aware of any negative reactions concerning the progress of the project?"

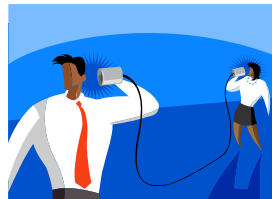
4. Monitoring Performance



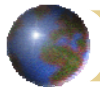


## *Communications Toolkit*

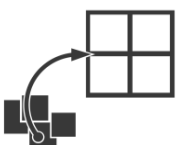
- MS Outlook – Email broadcast groups and task list
- Shared folder on network drive
- Voice mail
- Collaborative software such as MS Groove



4. Monitoring Performance



## *5. Calling it Done and the Lessons Learned*







## *When is Done, Done? 5 Questions*

1. Is the sponsor satisfied that the project's original aims and business objectives of the project have been met?
2. Is the customer satisfied that he or she is receiving an improved service?
3. Have we spoken to all our stakeholders about final results?
4. Have all new insights and ideas been recorded?
5. Have I thanked all the contributors to the project?

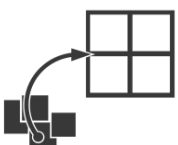
5. Calling it Done and the Lessons Learned



## *Top-Three "Take Aways"*

1. Project management is disciplined work
2. We have easy access to great tools that we need to use more often and better
3. Improving project management skill is to moving forward in the direction and pace your business and life would desire

5. Calling it Done and the Lessons Learned



### Assessing Your Project Management Skills

Evaluate your ability to think strategically by responding to the following statements, marking the option closest to your experience. Be as honest as you can: if your answer is “never,” circle Option 1; if it is “always,” circle Option 4, and so on. Add your scores together and refer to the Analysis to see how well you scored. Use your answers to identify your best opportunities to sharpen your project management skills.

#### Options

**1=Never**

**2=Occasionally**

**3=Frequently**

**4=Always**

1. I check whether I should treat a series of actions as a project.

1	2	3	4
---	---	---	---

3. I take time to plan a project thoroughly before starting work.

1	2	3	4
---	---	---	---

5. I have identified which of my project's resources are occupied on other projects.

1	2	3	4
---	---	---	---

7. I always consider what the ideal outcome of a project would be.

1	2	3	4
---	---	---	---

2. I set specific, measurable objectives for projects.

1	2	3	4
---	---	---	---

4. I fully understand the difficulties I face in achieving a project's objectives.

1	2	3	4
---	---	---	---

6. I keep in regular contact with all stakeholders involved in my projects.

1	2	3	4
---	---	---	---

8. I ensure that everyone clearly understands the project's objectives.

1	2	3	4
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9. I set business targets for each part of a project.

1	2	3	4
---	---	---	---

11. I compile a full list of project activities before I place them in correct order.

1	2	3	4
---	---	---	---

13. I make sure all the key people have approved the plan before I start a project.

1	2	3	4
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15. I generally start project implementation with a pilot.

1	2	3	4
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17. I inform all interested parties of changes to project resource requirements.

1	2	3	4
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19. I adapt my leadership style to suit circumstances and individuals.

1	2	3	4
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21. I consider how well new team members will fit in with the rest of the team.

1	2	3	4
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23. I use my sponsor to help motivate my team.

10. I check that a project will not unnecessarily change what already works.

1	2	3	4
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12. I calculate manpower time and elapsed time of all project activities.

1	2	3	4
---	---	---	---

14. I liaise with the finance department to check the costs of a project.

1	2	3	4
---	---	---	---

16. I keep a network diagram up to date throughout a project.

1	2	3	4
---	---	---	---

18. I prepare contingency plans for all major risks to the project.

1	2	3	4
---	---	---	---

20. I consider how best to develop my teams' skills.

1	2	3	4
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22. I make sure that each team member knows exactly what is expected of them.

1	2	3	4
---	---	---	---

24. I have documented and circulated the primary milestones of the project.

1	2	3	4
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25. I ensure that every team member has access to the information they need.

1	2	3	4
---	---	---	---

27. I ask people to attend review meetings only if they really need to be present.

1	2	3	4
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29. I prepare the objectives and agendas of meetings related to my project.

1	2	3	4
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31. I keep my sponsor fully up to date with progress on the project plan.

1	2	3	4
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1	2	3	4
---	---	---	---

26. I avoid keeping secrets from the project team and stakeholders.

1	2	3	4
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28. I use the same standard method of reporting progress to all stakeholders.

1	2	3	4
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30. I use a logical process to make decisions with my project team.

1	2	3	4
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32. I use problem-solving techniques to arrive at decisions.

1	2	3	4
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## ANALYSIS

Now you have completed the self-assessment, add up your total score and check your performance by referring to the corresponding evaluation below. Whatever level of success you have achieved; there is always room for improvement. Identify your weakest areas and seek assistance through supplemental research, education and training.

**32-64:** You are not yet sufficiently well organized to ensure that a complex project will achieve its objectives. Review your planning process thoroughly and make sure that you follow it through step-by-step.

**65-95:** You are a reasonably effective project manager, but need to address some weak points.

**96-128:** You are an excellent project manager. Be careful not to become complacent or to let your high standards slip.