Project Management - The Basics That Every Business Should Implement

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What We Will Discuss Today

- What is a project?
- What is a task?
- Why should I implement basic project management practices in my business
- Tips to simplify your projects and make them less stressful
- The Waterfall Methodology
- The Agile Methodology
- What does this look like in real life?
- Practical application
- Tips on project communication
- How to leverage communication as a way of ensuring your project is a success
- Do these 3 things to see an immediate impact
- The basics

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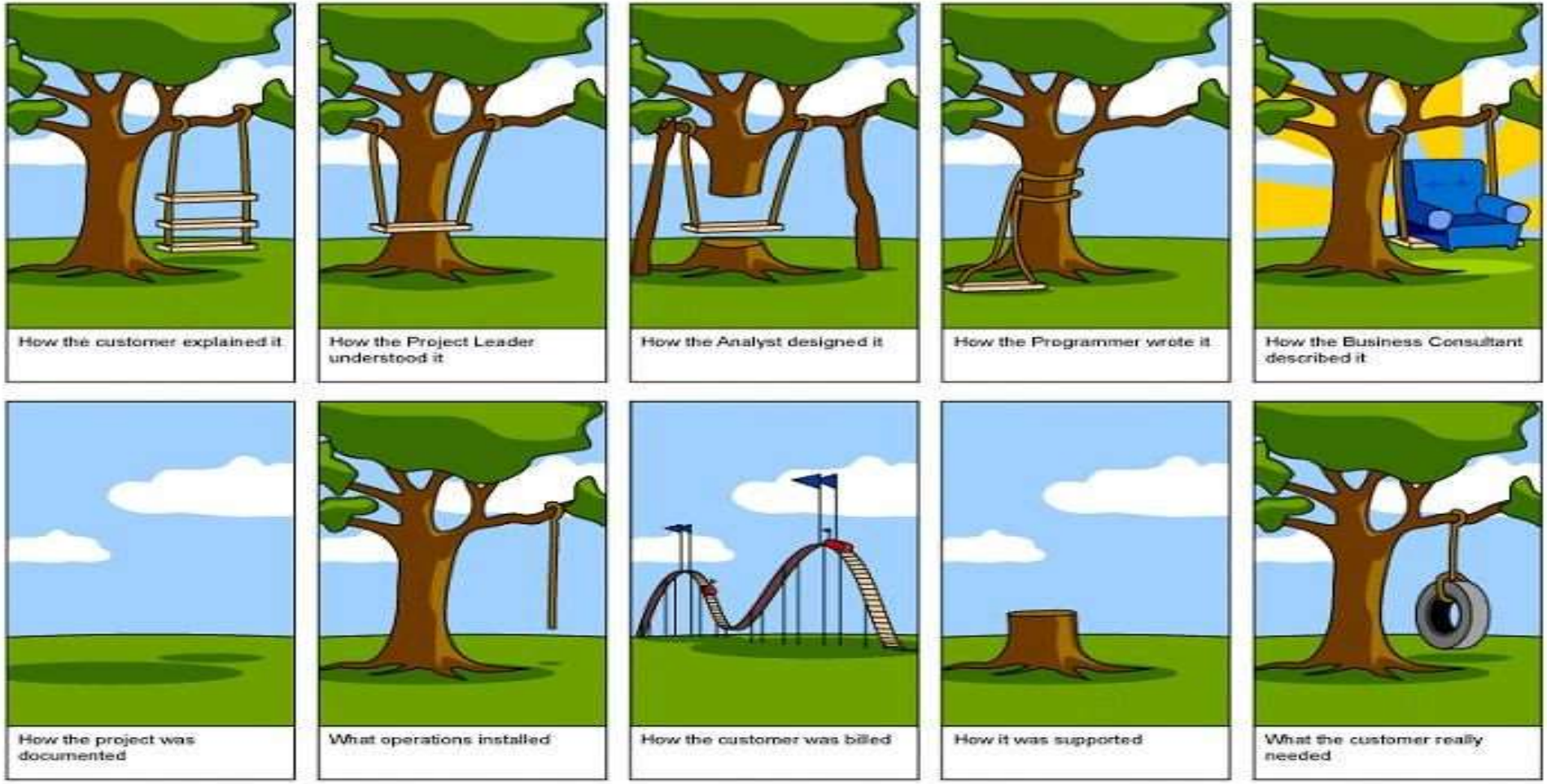

What is a Project and What is a Task?

1. There is a specific goal
2. There is a timeline
3. There is a specific budget
4. There are stakeholders
5. There are limited resources
6. There is a defined scope

"In project management, a **task** is a work item or activity with a specific purpose related to the larger goal.

It's a necessary step on the road towards project completion."

The Juggling Act of Resources, Time, Cost and Scope

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Project Methodologies

- A project management methodology is a set of principles, tools and techniques that are used to plan, execute and manage projects. Project management methodologies help project managers lead team members and manage work while facilitating team collaboration.

- There are many different project management methodologies, and they all have pros and cons. Some of them work better in particular industries or projects, so you'll need to learn about project management methodologies to decide which one works best for you.

- "Some methods though, like Waterfall, aren't as effective for software teams. With priorities and customer needs constantly changing, the Agile methodology breaks projects up into several phases to drive continuous improvement".
  https://asana.com/resources/agile-methodology

- We will take a closer look at Waterfall and Agile in particular during this Master Class.

Examples of Project Methodologies

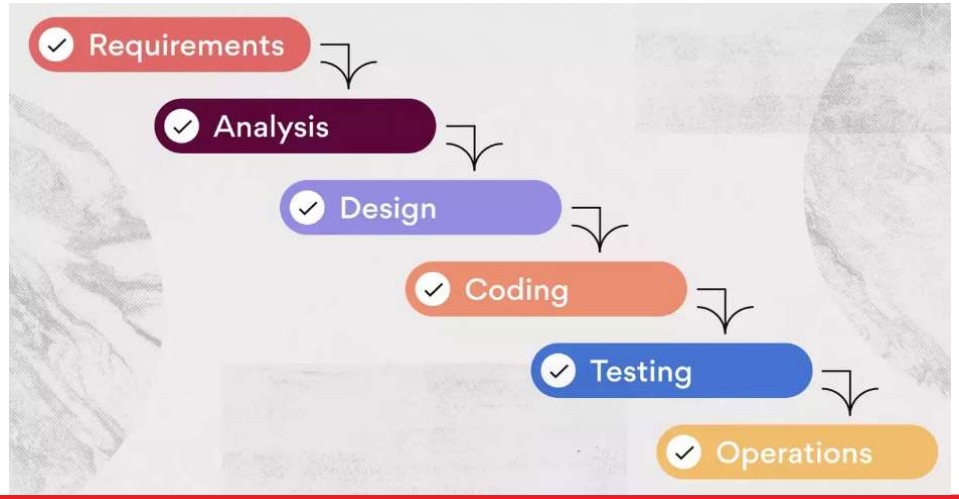
- Waterfall Methodology
- Agile Methodology
- Scrum Methodology
- PMI / PMBOK
- Critical Path Method (CPM)
- Kanban Methodology
- Extreme Programming (XP)
- Lean Methodology
- Six Sigma
- PRINCE2

The Waterfall Project Methodology

- "The waterfall methodology is a project management approach that emphasizes a linear progression from beginning to end of a project. This methodology, often used by engineers in the manufacturing and construction industry, is front-loaded to rely on careful planning, detailed documentation, and consecutive execution." – www.business.adobe.com https://asana.com/resources/waterfall-project-management-methodology

- Each milestone needs to be completed before the production process can move forward. For example, you cannot build the walls of a house if foundation has not been poured.

- The waterfall methodology is often visualized in the form of a flow chart or a Gantt chart.
  This methodology is called waterfall because each task cascades into the next step.
  In a Gantt chart, you can see the previous phase "fall" into the next phase.
  https://asana.com/resources/waterfall-project-management-methodology



The Waterfall Project Methodology

The waterfall model divides each project into different phases and moves through the phases in sequential order. No phase can begin until the phase before it is completed. Typically, each phase ends in a project milestone that indicates the next phase can begin.

The specific phases of the waterfall process depend on exactly what your team is creating, but typically they look similar to this:

- Requirements phase, sometimes split into an additional analysis phase
- System design phase
- Implementation phase, also known as the development phase or coding phase—depending on the type of project
- Testing phase
- Deployment phase, also known as the operations phase
- Maintenance phase

The Agile Project Methodology

- "Agile methodology is a project management framework that breaks projects down into several dynamic phases, commonly known as sprints." – www.business.adobe.com https://asana.com/resources/waterfall-project-management-methodology

- "Agile project management is an evolving and collaborative way to self-organize across teams. When implementing the agile methodology, project planning and work management are adaptive, evolutionary in development, seeking early delivery and are always open to change if that leads to process improvement. It's fast and flexible, unlike waterfall project management.

- The Agile methodology offers project teams a very dynamic way to work and collaborate and that's why it is a very popular project management methodology for product and software development. That's because what we think of as agile really appeared in 2001 with the publication of the "Manifesto for Agile Software Development," authored by 17 software developers." https://www.projectmanager.com/blog/project-management-methodology

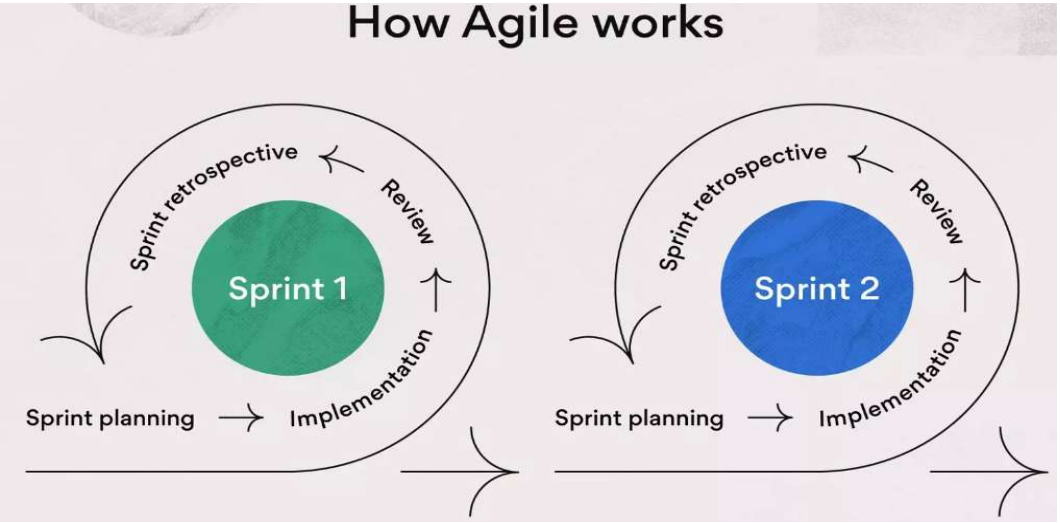
The Agile Project Methodology

- The practice originated in software development and works well in that culture. https://asana.com/resources/waterfall-agile-kanban-scrum

- How do you know if agile is for you? It has been applied to non-software products that seek to drive forward with innovation and have a level of uncertainty, such as computers, motor vehicles, medical devices, food, clothing, music and more;
  and it's also being used in other types of projects that need a more responsive and fast-paced production schedule, such as marketing."
  – .https://www.projectmanager.com/blog/project-management-methodology

- The Agile philosophy is all about adaptive planning, early delivery, and continuous improvement.

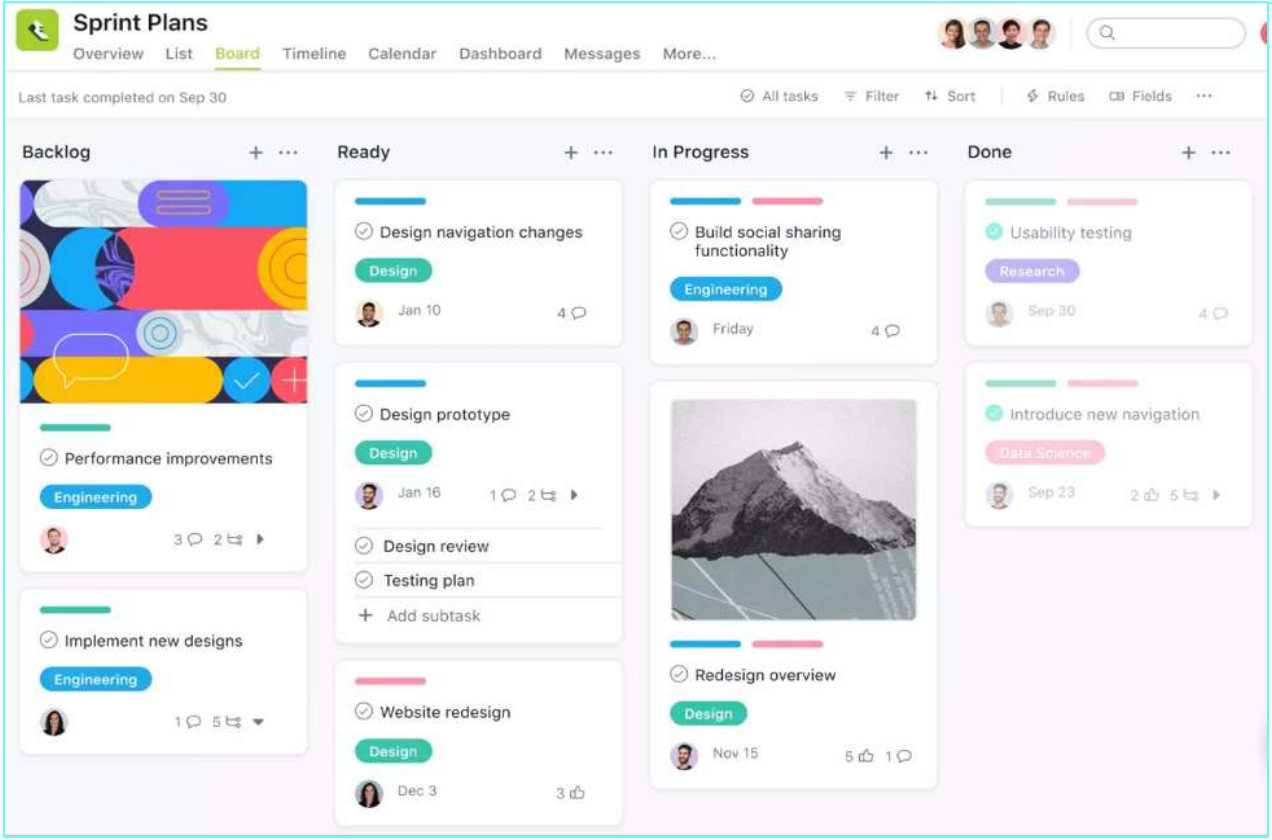
- Agile sprints are used to deliver value quickly in the shortest possible time frame!

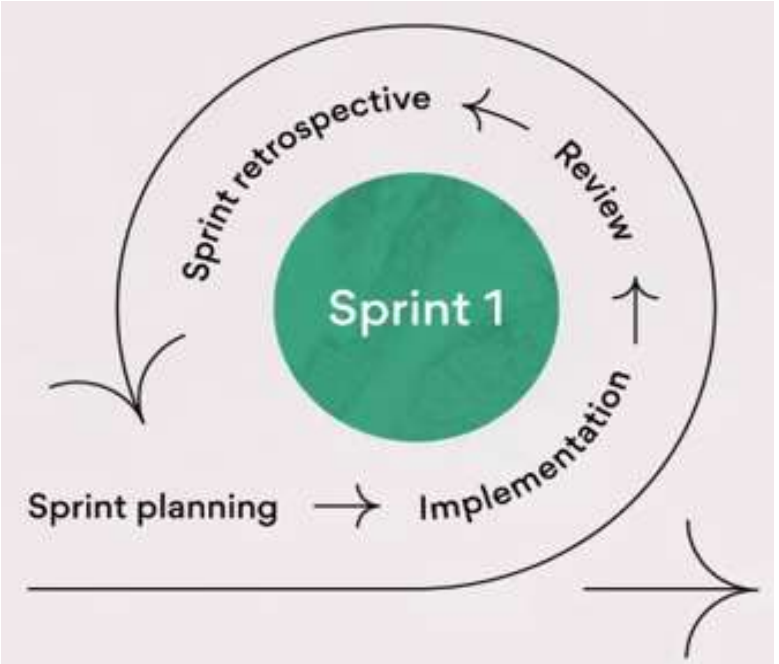


The Agile Project Methodology

- First, the product owner organizes the product backlog. The product backlog is a list of every task that may be worked on during the sprint. This information is usually stored in a project management tool.
- Before the sprint, the entire project team participates in sprint planning to identify the best tasks to work on during the two-week period.
- During the sprint, Agile teams meet frequently to discuss blockers and action items.
- Once the sprint is over, team members get together to run a sprint retrospective and identify what went well and what could have been better.
- When someone speaks of Kanban in project management, they're most commonly referring to Kanban boards. A Kanban board represents stages of work with columns that hold the individual tasks for each stage

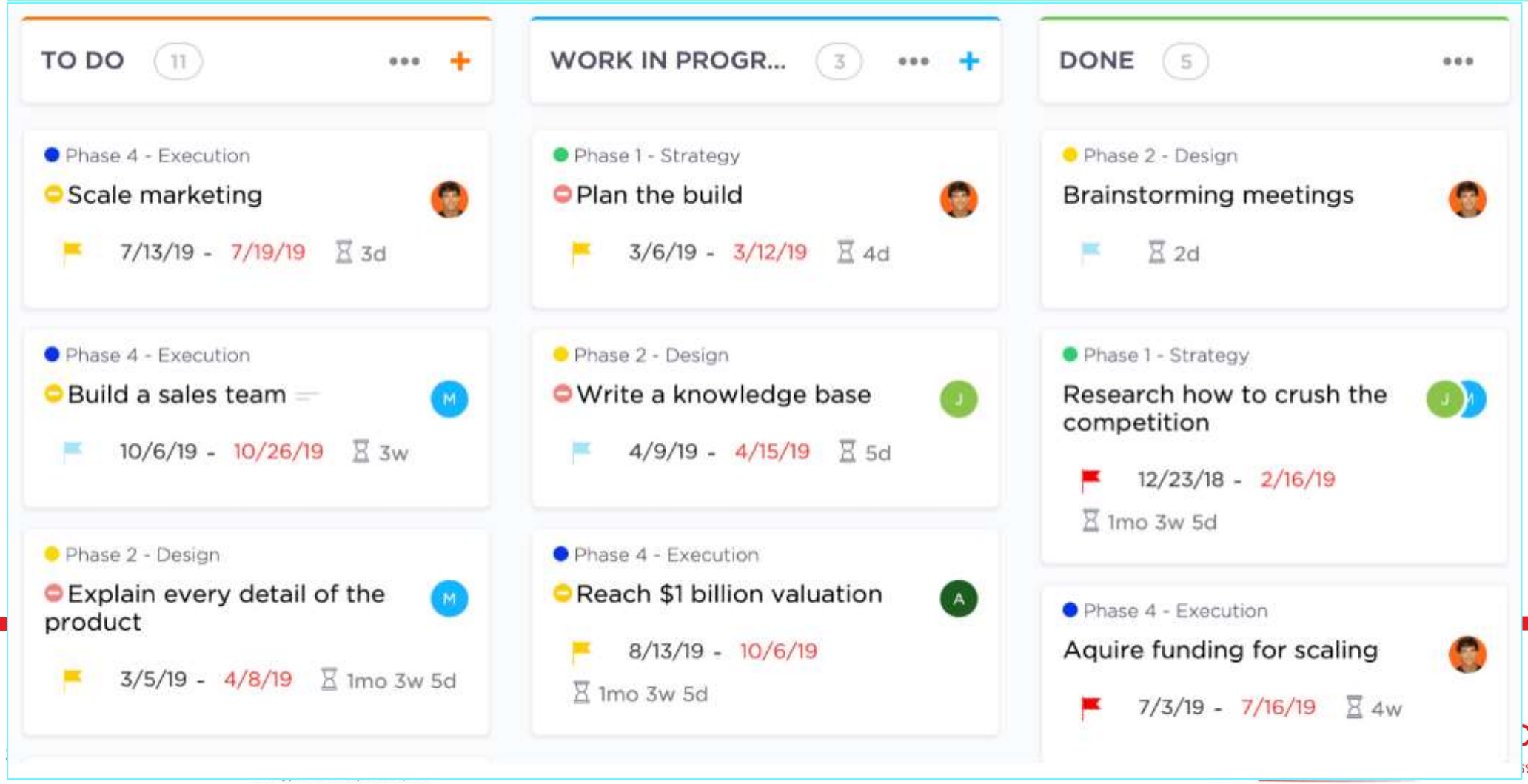
Agile Kanban Board Examples





https://asana.com/templates/agile-project-plan

Agile Kanban Board Examples



The Seven Habits of Brilliant Project Managers

1. *Plan*
2. *Communicate*
3. *Remain **customer-focused** at all times*
4. *Focus on **solutions** to problems*
5. *Have a **consultative yet decisive approach***
6. ***Agility** / Flexibility*
7. *Track **scope***

Project Challenges

If basic project management principles are not applied, we risk failure of the project.
Projects run into trouble because of breakdown or challenges in these four areas:

1. Process
2. Resources
3. Communication
4. Scope

Project Phases

Project Initiation in Real Life

What a Project Manager Does

TASKS:

- 1. Define Outcome
- 2. Write a Project Charter
  - Objectives
  - Scope
  - Risks/Constraints
- 3. Identify Stakeholders

TOOLS:

- 1. Project Charter
- 2. Responsibility Assignment Matrix (RASCI)

What you can do

TASKS:

- Ensure you and the customer agree on what they are going to get.
- Identify possible assumptions and risks and think of a backup plan. Tell your customer upfront
- Identify Stakeholders

TOOLS:

- Responsibility Assignment Matrix (RASCI) – List who are all involved in the projects – Your side and the customer's side

Considerations

1. *Is the **scope** of the project clear?*
2. *Is the project **funding** approved?*
3. *Have all the **stakeholders** been identified?*
4. *Does the project contain **3rd Party** or external resources? Are there aligned contracts in place?*
5. *Have you confirmed **in writing** the project delivery expectations (time and scope) with all the stakeholders?*
8. *Do you have a high-level **effort estimate** for the project?*
9. *Has the project **team** been established or are resources available to start the project?*

Project Planning in Real Life

What a Project Manager Does

TASKS:

- Finalise Scope
- Identify and Schedule Activities
- Allocate Resources
- Finalise Budget

TOOLS:

- Project Plan

What a you can do

TASKS:

- Finalise scope of what you will deliver/do
- Get the team together incl. contractors
- Make a list of all activities and assign dates to them

TOOLS:

- A project plan

Selecting Resources

Resources are people **and** things. **People** are seen as the **Time** part and **things** are the **Materials**.

- Resources can be **internal or external**.
- Make sure you have back-to-back agreements with outside resources.

Questions to think about when considering which people to allocate:

1. What level of expertise/skills do you need?
2. How many people will be required to complete the task?
3. How long will it take?
4. Will the resource be available?
5. Do I have a backup resource for this task?
6. Does their timescales match what you agreed with the customer?

Materials will be the things needed to complete the task. These could be things that need to be **purchased, hired or reserved** and can be obtained from **outside or internally**.

Project Execution in Real Life

What a Project Manager Does

TASKS:

- Delivery of the tasks on time and in budget
- Communicate progress
- Manage quality and scope
- Keeping project documents up to date

TOOLS:

- Project Plan

What a you can do

TASKS:

- Delivery of the tasks on time and in budget
- Communicate progress and any impediments
- Manage quality of deliverables
- Record all changes, risks, issues and mitigations

TOOLS:

- A project plan
- A Risk and Issues Log

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Monitoring and Control in Real Life

***This is an activity that sits across all the phases**

What a Project Manager Does

TASKS:

- Communication and Reporting
- Compare Actual against Planned
- Adapt and change

TOOLS:

- Project Plan
- Report Templates
- Communications plan

What a you can do

TASKS:

- Communication and Reporting
- Compare Actual against Planned
- Adapt and change

TOOLS:

- Project Plan
- Report Templates
- Schedule regular catchups with all stakeholders

Best Practice When Communicating

Always prepare your content by asking Who, Why, What, When, How.

1. Who is receiving this information – Think about **confidentiality and role** in the project?

2. Why do they need to know about this – In what way will this information be **useful** to them and **what should they do with it**?

3. What do they need to know – what is the **level of detail**

4. When do they need to know – **How often** do you need to inform them

5. How will you inform them – in which **format** you will share the information

Best Practice For Emails

- **Select the necessary audience** – you don't always have to Reply All, or CC everyone
- In the subject line, give a **signpost** like "Please action"/"Please review and approve"/"For your information only"
- **Use the subject line** to clearly indicate what the email is about e.g. "For urgent response: Blue Sky Investments asking to increase number of guests"
- If there is **a time constraint** to your email indicate this in the subject line e.g.: PLEASE APPROVE BY 25 January 2020
- Use bullets or short sentences
- Remember that using **only capital letters and bold font** can come across as "screaming" in the email
- If necessary, add colour to draw attention to specific areas, but don't overdo it
- If emailing more than 1 person with instructions, make sure you indicate who you are addressing by using ***@TheirName***
- Use priority flags and reminder settings on the emails if necessary.

Best Practice when Communicating via a Call

FOR HOSTING OF VIRTUAL MEETINGS (e.g. Teams, Google Meet, Zoom, Loom)

- Send out a **meeting invitation** to necessary attendees containing the **dial-in details** well before the time
- **Greet** and thank attendees for joining when the call commences
- Ask **permission** from attendees if you would like to make a **recording** of the call
- State the **objective or agenda** of the call both in the meeting invite and at the beginning of the call
- Minimise background noise, and mute yourself when not speaking on the call
- Switch on your camera if bandwidth allows and if you would like to create a more personal experience
- At the end of the call, summarise the tasks and decisions and the responsible parties, and follow up with the same contents in an email to attendees

FOR PHONE CALLS

- Ask if it's **convenient to discuss** something
- At the end of the call, **summarise** what was agreed **in an email** and send to them for record and accountability purposes.

Alternative Ways of Communicating

1. Consider asking permission from the relevant stakeholders to create a **WhatsApp group** for the Project team, but agree rules. This should be used for specific types of updates and serve a purpose to inform

2. **Instant messenger** apps on your computer or smart phone, such as Teams, Zoom or Loom – this will help you to see who is available and can be used for a quick answer to specific questions

3. **Project management apps** such as Trello to collaboratively leave messages and report progress or impediments on tasks

Risk Management

There are mainly 3 types of risks, 2 of which you can plan for:

1. **Known risks** – These are risks that you know from right at the onset of the project and are deemed to be acceptable enough for the project to go ahead
2. **Predictable risks** – These risks may or may not occur and are anticipated based on previous experience on similar projects in your organisation or the industry
3. **Unknown risks** – These risks lie outside your control and cannot be prepared for

Risks will come from the following areas in your project:

1. Funding
2. Skills
3. Time
4. Resource availability
5. External Factors

Once identified, evaluate and prioritize them to **design your mitigation plan**.

Project Closure in Real Life

What a Project Manager Does

TASKS:

1. Communication and Reporting
2. Compare Actual against Planned
3. Lessons Learnt

TOOLS:

1. Project Plan
2. Report Templates
3. Communications plan

What a you can do

TASKS:

TASKS:

1. Communication and Reporting
2. Compare Actual against Planned
3. Lessons Learnt

TOOLS:

1. Project Plan
2. Report Templates
3. Communications plan

Do These 3 Things To See An Immediate Impact

- Start using a project plan with dates and milestone dates to identify problems early on
- Set a standard communication plan with all your customers and stakeholders – Schedule this at the start of your project
- Identify possible risks and start thinking of a backup plan OR tell your customer about them and work together to agree how you will deal with it

Questions?

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