

The Project Management Process – A Quick Reference Guide



Team Effectiveness & Meeting Tips

“who’s who?”

Project personnel may foster teamwork by applying these tips.

- Project requires: individual, work group or core team?
- Project roles: sponsor, project leader, team member, contributor
- Meeting management: norms, agenda (purpose, products, process), roles, meeting record, secondary facilitator; clarify the decision-making process/es to be used (consensus? consultative?)
- Meeting roles: facilitator, timekeeper, scribe, recorder
- Meeting record: decisions, assignments, due dates, open issues

INITIATING

“what’s it all about?”

Project Team Launch Meeting

“all aboard!”

- Sponsor, leader and members together determine Strategy, Scope and high-level Plan (see below)

- Previous project/s review “prior lessons learned”

Project Charter

“high-level agreement”

- Outlines business problem / opportunity, objectives, assumptions / constraints, key milestones, budget estimate, project manager assigned

Identify Stakeholders

- Begin to assess which individuals who, because of actual or potential changes caused by the project, may benefit, be negatively affected, or perceive they will be positively or negatively impacted

PLANNING

“how?”

Scope: Mission Statement

“a two-sentence summary”

- 1st sentence: “ _____ will _____
for _____.”
(person / team name) (main deliverable of project)
(customer/s of deliverable)
- 2nd sentence: “This project supports _____’s
objective(s) to _____.”
(organization name/s)
(organizational objective)

Scope: Boundaries

“what’s in/what’s out”

- List of major activities considered to be **within** the mission and to be the responsibility of project personnel
- List of major activities considered to be **outside** the mission and not to be the responsibility of project personnel (though relevant to the project context)

- Answer the following sentence: “This project will be considered completed when _____ occurs.”
(significant concluding activity/ies)

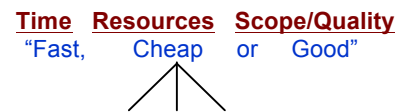
Scope: Critical Success Factors (CSFs) “show-stoppers”

- The fundamentals of the project that must be continually focused upon
- The few crucial elements (3-5) that **must** go right for the project to succeed
- Ask: “If _____ happens will that, in and of itself, cause the project to fail?” If yes, then the element is a CSF.
(CSF candidate)

Project Balance

“reality check”

- Throughout the project, communicate to gain alignment on a realistic project “TRS Balance”:



Project Planning

- Aim for an early “**high-level, deliverables-based, intuitive timeline**” to validate or dialogue around the “TRS Balance” with sponsor
- Move on to a “**detailed, task-based, estimated timeline**” as needed

WBS & Schedule Development

Work Breakdown Structure

“our to-do list”

- Phases → Deliverables (& Milestones) → Tasks
- Deliverables should be Specific, Measurable, Achievable, Results-Oriented and Time-Bound (SMART)

Project Schedule

“our estimated timeline”

- Work effort “person-hours?”
- Resource assignments “who’s on it?”
- Task duration “when will we have it?”
- Task dependencies/overlaps “first things first”
- Critical path “tasks impacting end-date”
- Contingencies (50% chance & CSF threat) “have a Plan B”
- Post-Project Assessment (PPA) “milestone on critical path”

Project Plan Development

“how to manage the work?”

- Resource Plan: Resources needed? Quantities? Costs?
- Communication Plan: Who needs what info? When? How?
- Executing Plan: Schedule and issues tracking; scope and risk management; contingency planning
- Reporting Plan: Progress criteria, metrics, documentation; Corrective action / contingency plan usage

Risk Analysis

“Murphy’s Law”

- Identify potential risk events
- Quantify potential risk events: probability x impact to project
- Manage potential risks: will you Accept, Mitigate, Transfer or Avoid?

| Risk Event | Probability (1,2,3) <i>(Low, Med, High)</i> | Impact (1,2,3) <i>(Low, Med, High)</i> | Overall Score <i>(Probability x Impact)</i> | Response: <i>Accept, Mitigate, Transfer, Avoid</i> |
|------------|--|---|--|---|
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Team Readiness

“critical competencies”

- Identify critical skills required to ensure success of the project
- Manage gaps between skills required and project team available; identify any risks posed; involve project sponsor, if necessary

Communication

“the glue that holds your project together”

- The three most important words in Project Management are “**communication, communication, communication**”
- **Prior to Executing**, gain plan approval from Steering Committee, sponsor/s, customer/s to ensure clarity and alignment
- **Stakeholders**: those who perceive they are positively or negatively impacted by the change the project brings
- **Information sources**: those who have information that project personnel need to know

| Influencer Candidate | Why an Influencer? | Action Plan | Person Assigned | By When? |
|----------------------|--------------------|-------------|-----------------|----------|
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EXECUTING

“now, just DO it!”

□ Do – Invoke the Project Plan

- Complete assigned tasks, deliverables, phases
- Schedule Tracking
- Issue Tracking
- Risk Management
- Scope Management

MONITORING & CONTROLLING

□ Manage Project Influencers “communicate³”

□ Check “how are we doing?”

- Monitor actual vs. plan
 - What has changed? Is the project on track? Off track?
 - Assess how changes/external events may impact the project
 - Identify gaps in actual vs. project plan

□ Act “stay the course?”

- Apply contingency plan, or -
- Develop corrective action plan
- Implement
- Update the project schedule, report

CLOSING

“it’s a wrap!”

□ Post-Project Assessment (PPA)

- PPA is on the schedule from the outset of the project
- Recruit a facilitator; include all appropriate participants / others who may have contributed to the project
- Create a safe environment
 - Focus on “what” not “who”
 - “What went well and successfully?”
 - “Next time, what might we do differently?” ○
- On longer projects, do interim project assessments
- **Share with others** “current lessons learned”
 - Create electronic log of what went well and what you would do differently
 - Post and publicize for access by future project personnel



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