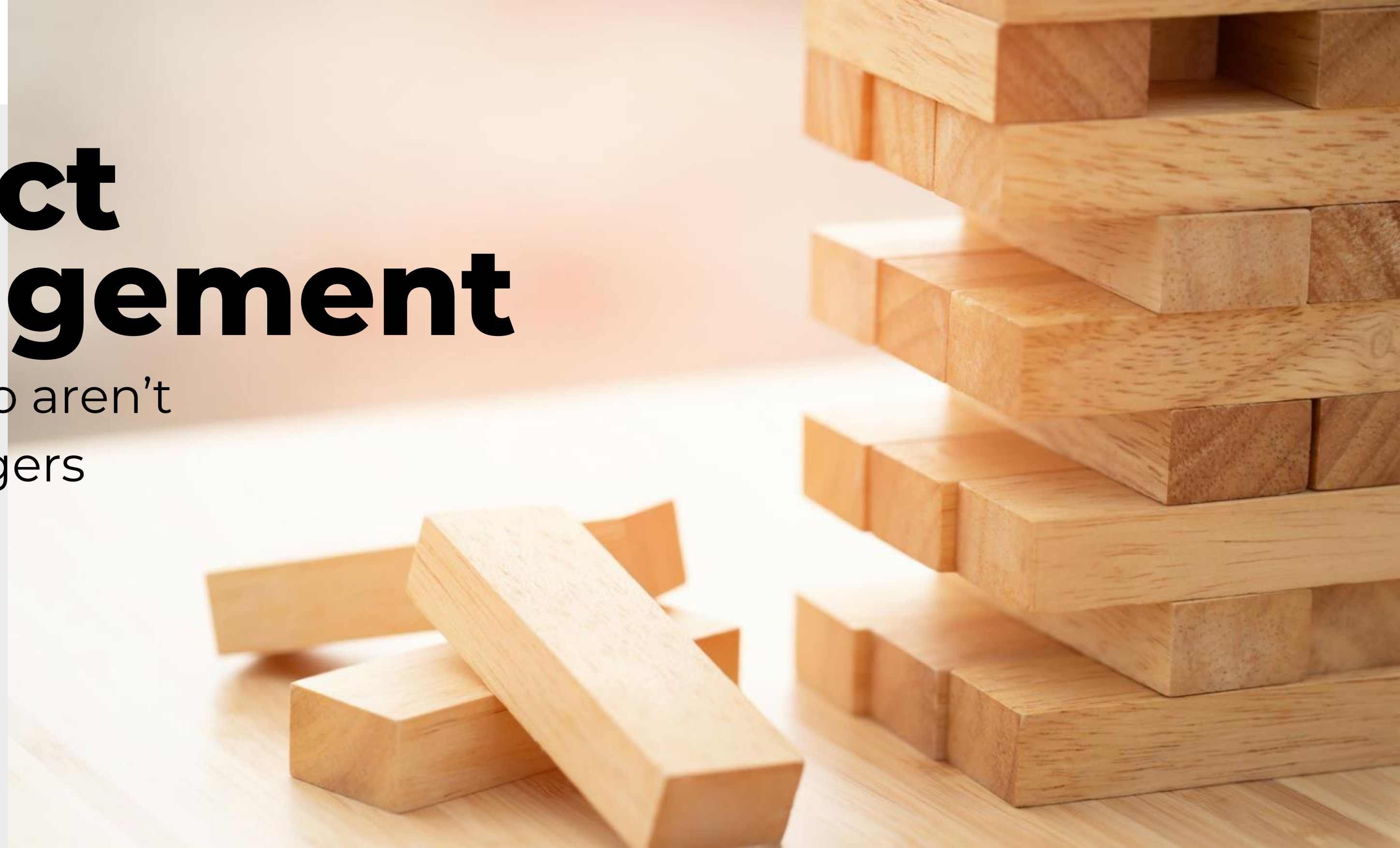


Project Management

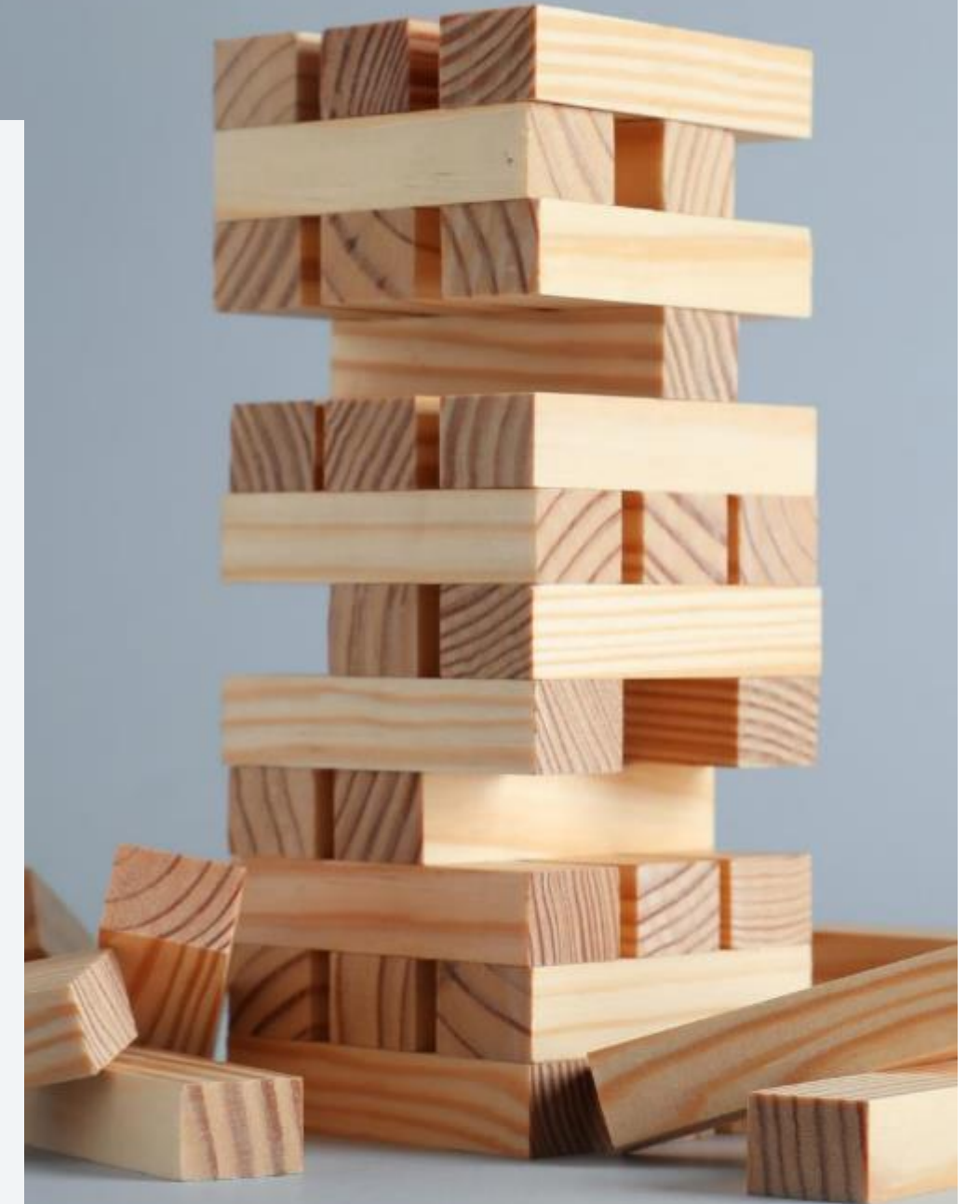
for people who aren't
project managers



Objectives

This course will increase your ability to:

- Understand what makes a project succeed.
- Initiate a project.
- Plan steps to move a project forward.
- Keep a project on track.
- Bring a project to a close and evaluate its success.



What Is a Project?

A temporary endeavor undertaken to create a unique product, service or result.

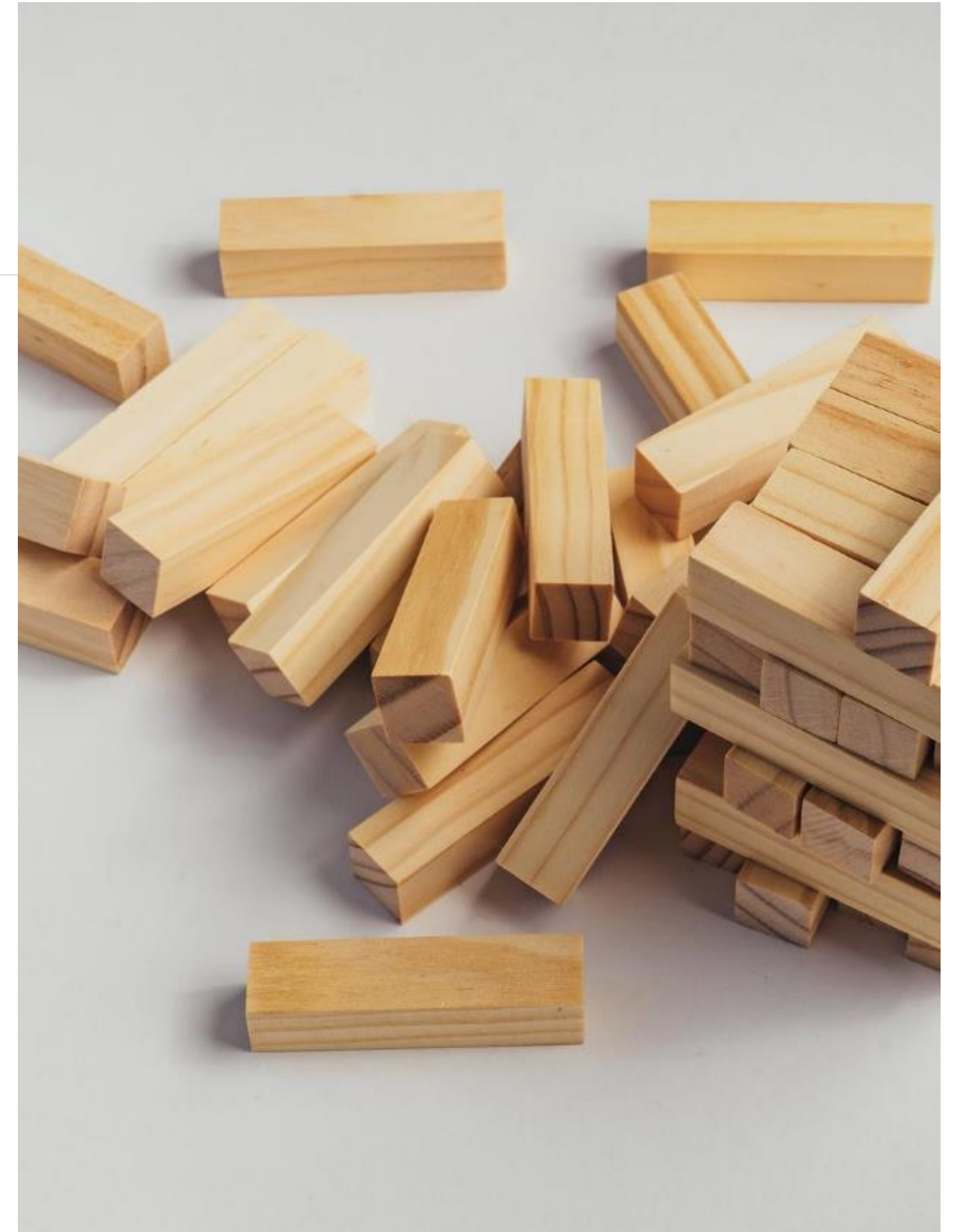


What a Project is Not:

- A series of tasks,
- A process / procedure, or
- An ongoing activity.

Why Might a Project Be Unsuccessful?

- Lack of planning / Lack of time,
- Misalignment with agency goals,
- Unrealistic / unachievable goals,
- Unrecognized / unaddressed problems,
- Wrong (no) leader / team,
- Lack of resources and support, or
- Unresponsive to change.



Project Failures

Fewer than 3% of companies successfully complete all of their projects.

Between \$ 50-150 Billion per year is lost on the failure of IT projects in the U.S.





What Makes a Project Succeed?

- A clearly defined outcome,
- Achievable, relevant goals,
- Careful planning,
- Clear, ongoing communication,
- Careful monitoring, and
- Responsiveness to problems, issues, and changes.

The Five Stages of a Project



Initiating and
Defining the
Project



Planning
the Project



Executing
the Project



Monitoring and
Controlling the
Project



Closing and
Evaluating
the Project



Initiating and Defining

What Triggers a Project?

- An organizational or customer need,
- A supervisor request,
- Strategic planning,
- Legislative changes,
- New technology, or
- Someone has an idea!



Stakeholders are people who have a vested interest in the success of a project, such as:

- Those who are directly affected by the outcome,
- Those whose participation is essential for success, and
- Those whose approvals and support you need,

Identify the
Stakeholders



How Can You Meet the Need?

Identify criteria:

- Budget, resources, and timelines / deadlines.
- Get everyone on the same page.

Brainstorm:

- Ask open ended questions.
- Share ideas without judging.
- Build on ideas shared by others.
- Write all ideas down.

Discuss and Narrow:

- Eliminate ideas that are unrealistic.
- Eliminate ideas that won't get you to your goal.
- Add new ideas that come up.

Evaluate Options:

- Discuss which ideas will best meet the goal.
- Be specific.
- Select the 'best' option.

Define Your Project Objectives

Project objectives are specific, measurable outcomes that the project aims to achieve within a specific timeframe.

- Provide guidance and focus.
- Align stakeholder expectations.
- Influence decision-making.
- Serve as a roadmap for planning.
- Should be regularly reassessed.



The Project Charter

- A concise description of project objectives,
- The scope of the project,
- An outline of roles and responsibilities,
- Timeframes and milestones,
- Budget and resource needs,
- Quality requirements, and
- Major risks, constraints, and assumptions.



Planning

Why Do We Need a Plan?

- You know what your next steps are.
- You set your priorities more easily.
- You know what you're doing is contributing to the success of your project -- and more importantly, you know why!
- You have clear goals.
- It helps you be more creative when looking for solutions.

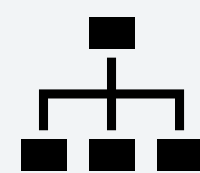
What to Include in a Project Plan



The people who will bring the plan to fruition.



Necessary resources and how to obtain them.



Schedule of work, including roles and responsibilities.



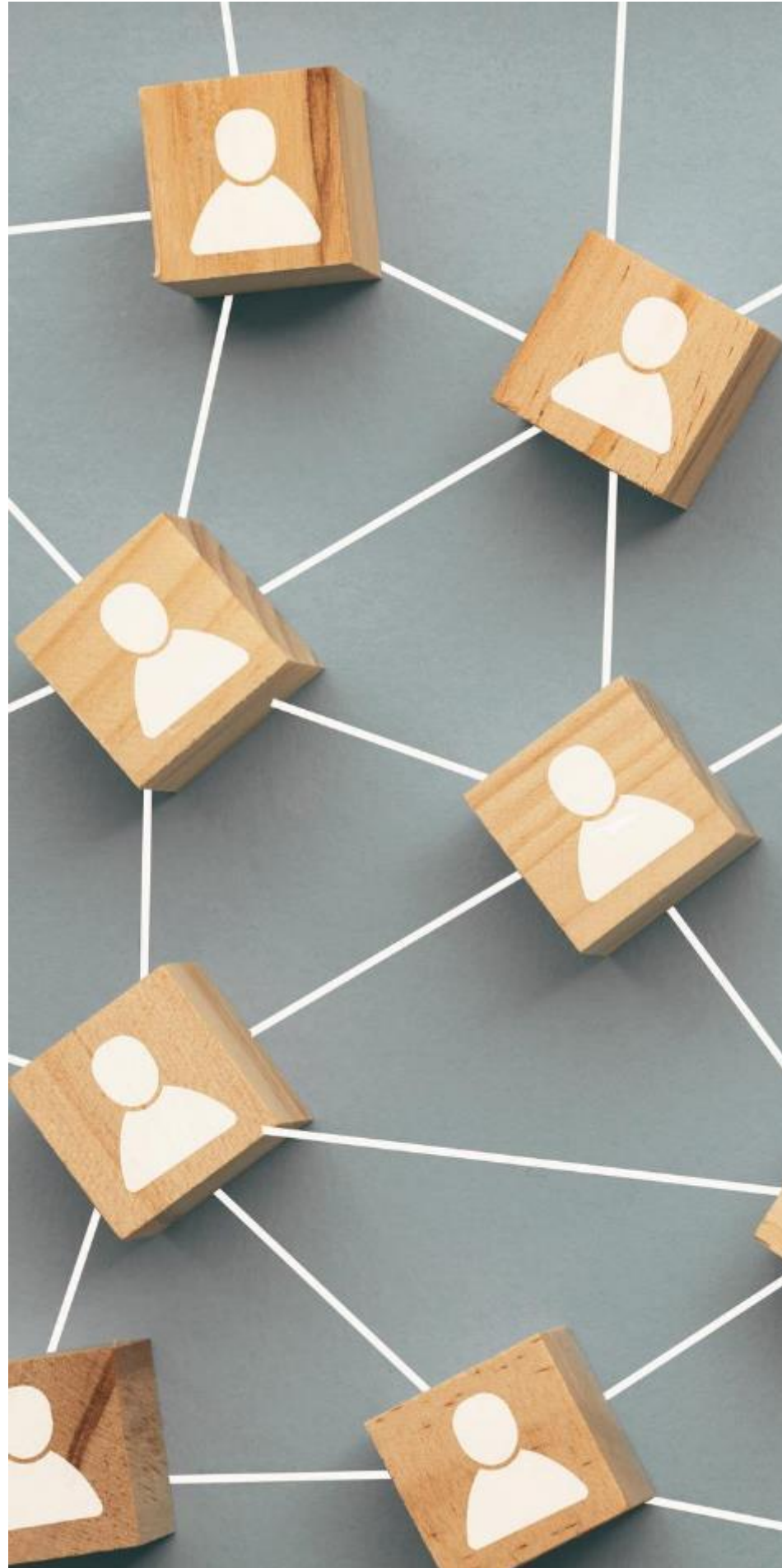
Contingency plans, in case of problems or changes.



Selecting the Right People

- Who has the necessary skills and experience?
- How large should the team be?
- Who has an interest in this project?
- Who has the time to work on this project?
- Who works well in a collaborative environment?





Project Sponsor

- Champions the project.
- Ensures senior leadership support.
- Provides necessary resources.
- Clears organizational obstacles.
- Approves / rejects final deliverables.

Project Manager

- Coordinates activities.
- Recruits effective participants.
- Keeps work on track.
- Manages schedule / budget.
- Identifies needed resources.

Steering Committee

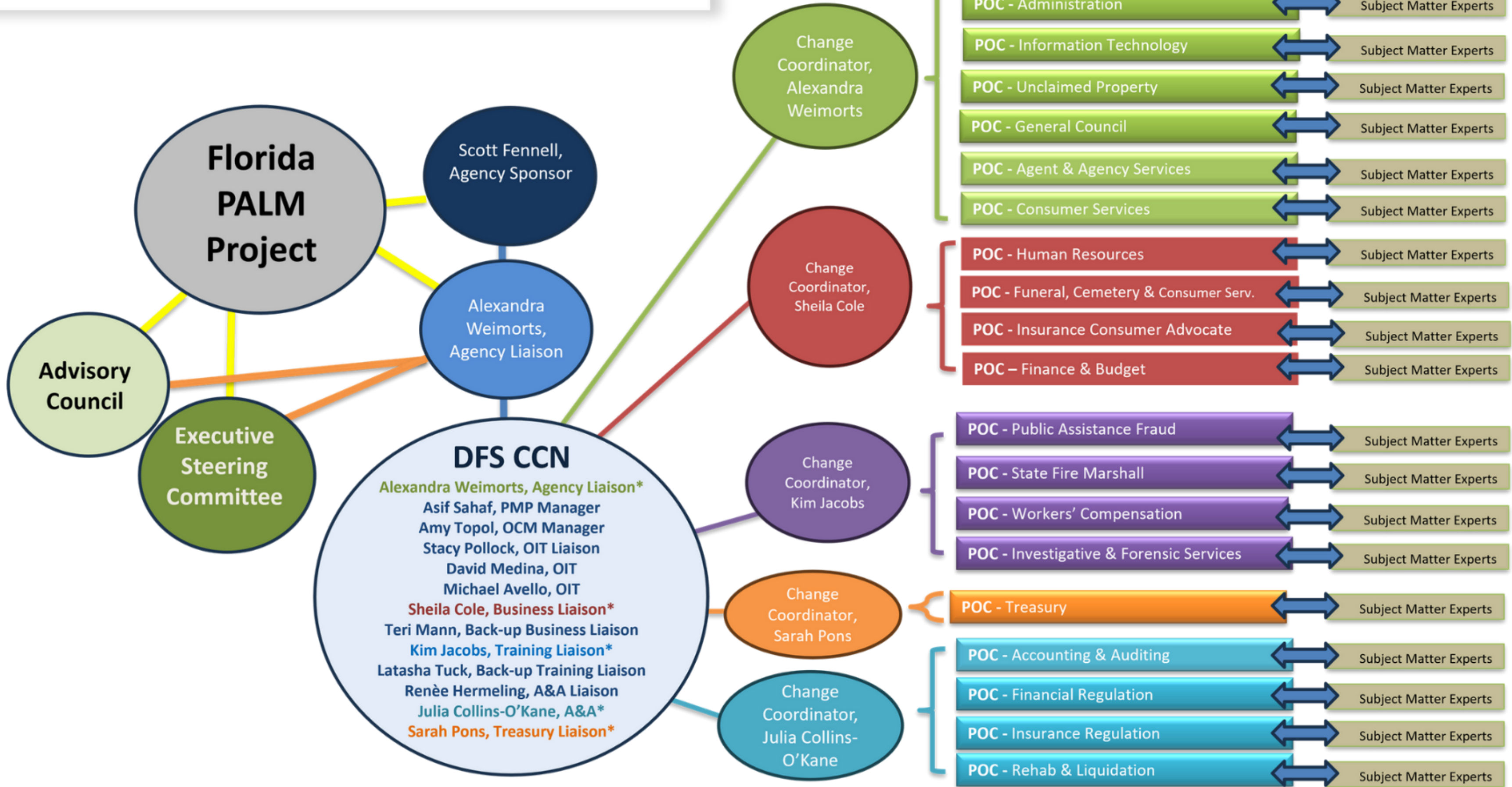
- Helpful when partnering across agencies, divisions, or companies.
- Approves the charter and any change requests (budget, schedule, scope).
- Votes at stage gates.

FloridaPALM

Planning, Accounting, and Ledger Management

Our Teams





Project Management Methodologies

Traditional / Waterfall

Requirements are understood,
and the path forward is clear.

Agile

Requirements are unclear
or may evolve over time

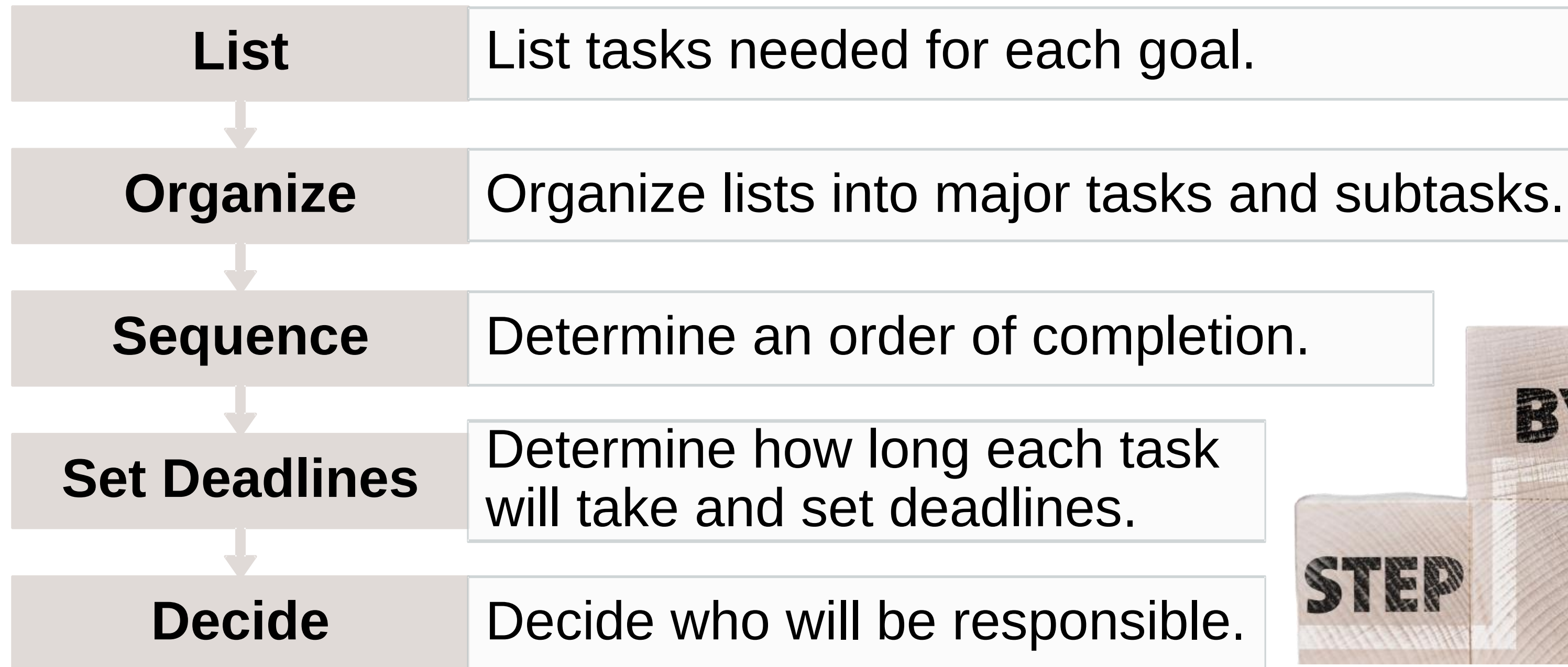


Components of a Project Schedule

- Sequence of tasks and activities,
- When each task / activity will start and be completed,
- Which team member is responsible for each task / activity, and
- Project deadlines and milestones.



The Scheduling Process





Types of Resources

- **Money**

- **Space**

- **Expertise**

- **Software**

- **Equipment**

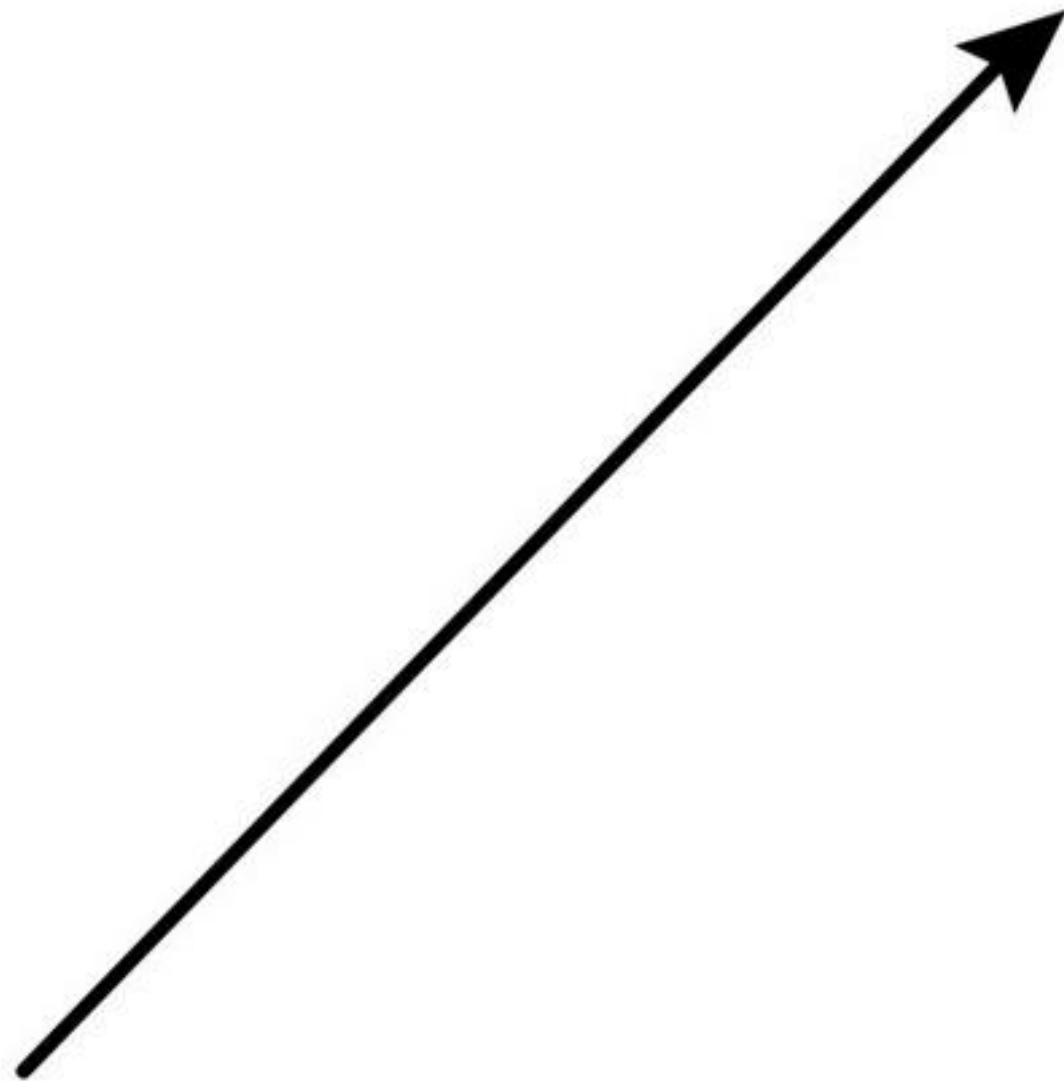
- **Information**



Budget

- Personnel,
- Travel,
- Training,
- Supplies,
- Physical space, or
- Professional services.

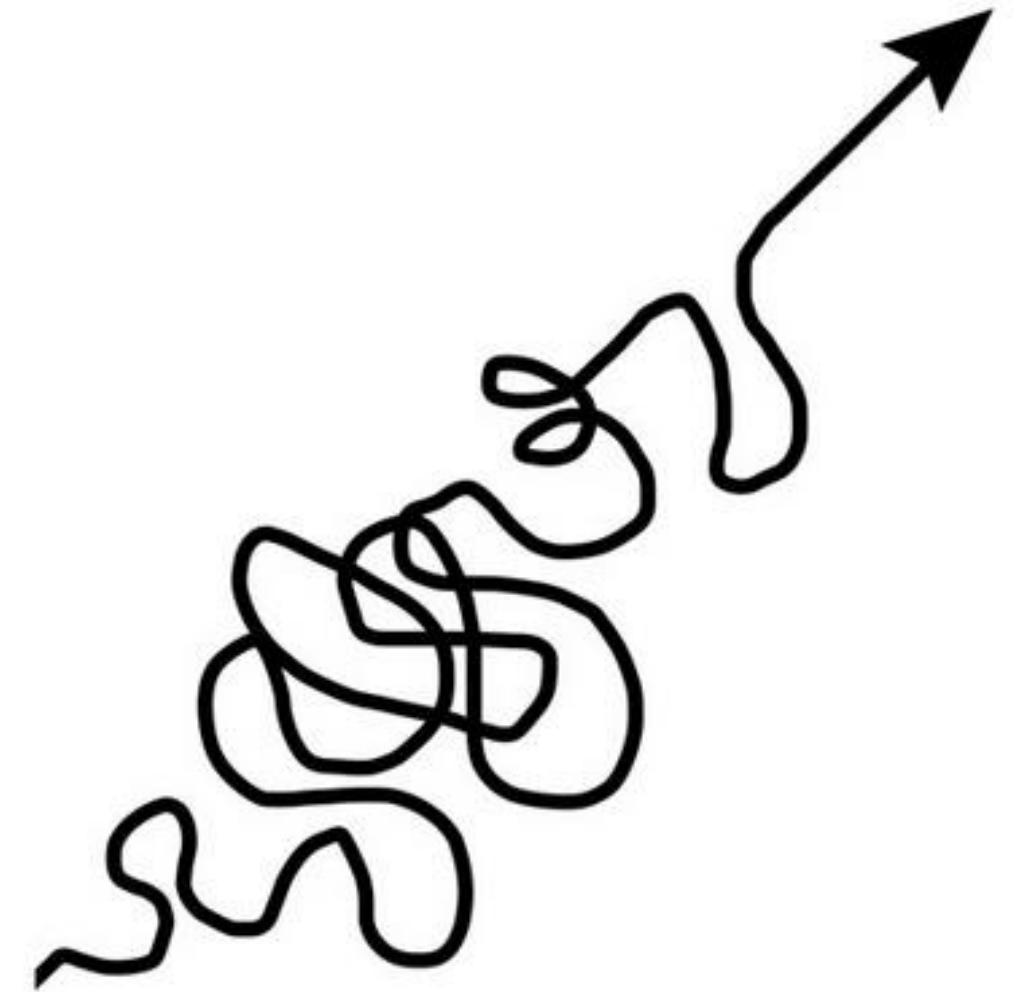
SUCCESS



What people think
success looks like.

The plan
must be
flexible
and
adjust to
project
needs.

SUCCESS



What success
really looks like.



What Could Go Wrong?

- People or resources unavailable,
- Approvals not forthcoming,
- Loss of team members,
- Internal or external change, or
- Significant delays, risks and issues.

Contingency Planning

Think ahead to what might go wrong and make a plan.

A good contingency plan prepares your team to act quickly and effectively when something doesn't go according to plan.





STAGE 3 & 4

Executing

Monitoring and Controlling

Purpose

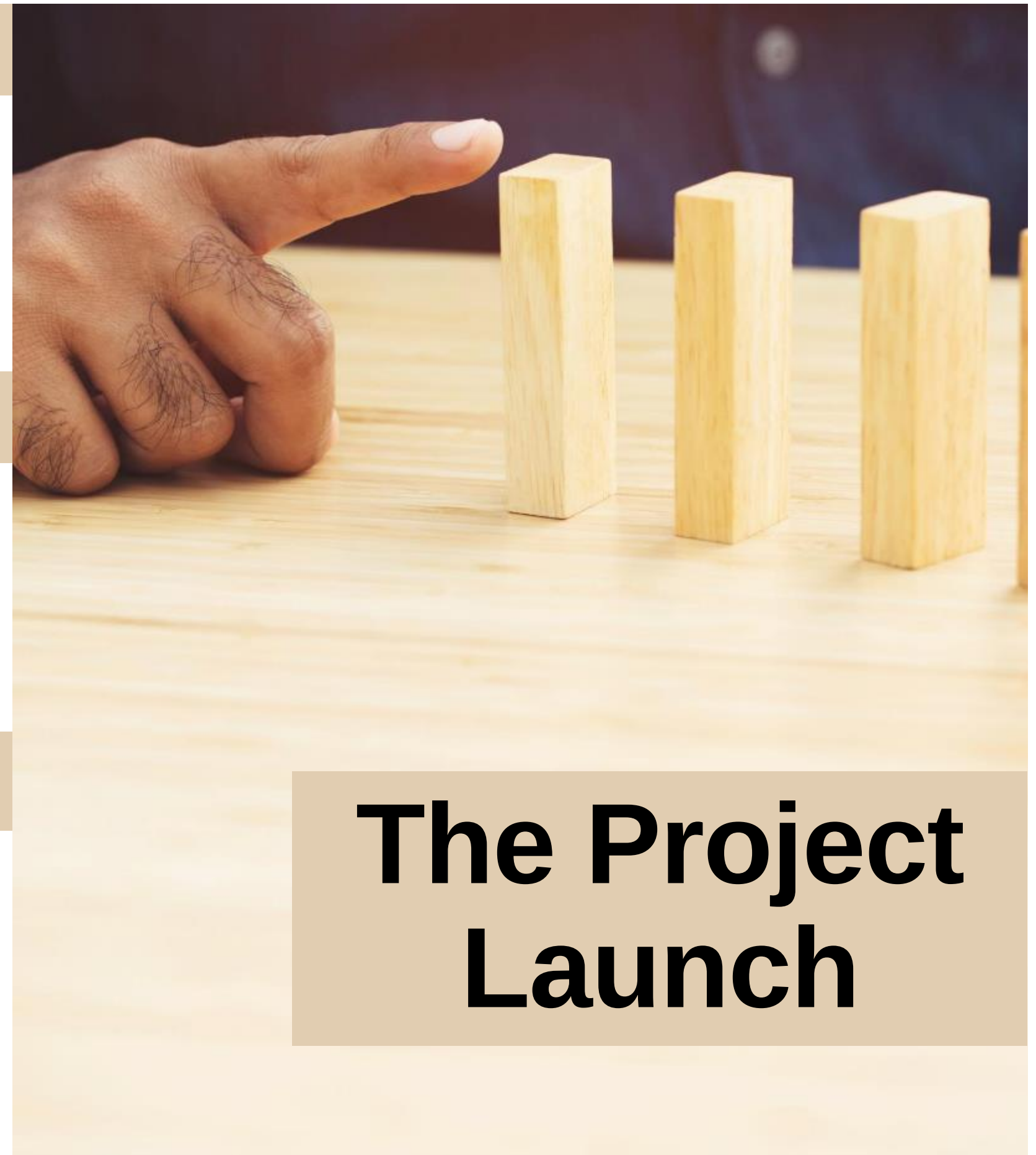
- Introductions and teambuilding,
- Gain commitment, and
- Clarify understanding.

Who to Invite

- Project leaders,
- Team members,
- Stakeholders and key people.

What to Cover

- Desired outcomes,
- Timetables and critical deadlines,
- Roles and responsibilities, and
- The Communications Plan.



The Project Launch

A close-up photograph of a hand pulling a wooden block from a tall, precarious tower of Jenga blocks. The tower is made of light-colored wooden blocks stacked in a staggered pattern. The hand is positioned on the right side of the tower, and the block being pulled is slightly offset from the rest of the structure. The background is a blurred wooden surface.

How to Keep Things Moving

Monitor the work.

- Set up a system.
- Check in regularly.

Communicate with everyone involved.

- Make team communication two-way.
- Hold regular meetings.
- Use communication tools.
- Cultivate a supportive environment.
- Share progress reports.

Milestones

- Remind team members how far they've come.
- Give a sense of accomplishment and motivation to keep going.
- Help track where you are in the schedule.





Manage Risks and Issues

- Monitor identified risks and keep an eye out for new risks.
- Collect ideas widely from your team.
- Look internally and externally.
- Take action to mitigate or avoid risk.

How to Handle Issues and Problems



- Act right away to address issues and problems.
- Respond quickly to change.
- If necessary, revise the plan and schedule.



Budget

Keep track of actual vs. planned spending. If spending is higher than expected, figure out why!

Getting Your Schedule Back on Track

- Renegotiate deadlines.
- Use later steps to fast-track and recover lost time.
- Narrow the project scope.
- Use crashing to deploy more resources.



Unavailable Resources



- Rethink the project scope and goals.
- Look for other ways to obtain resources.
- Find an alternative solution.
- Demand compliance.
- Put the project on hold or close it down.

Quality

- Don't rush quality checks to meet deadlines.
- Determine quality benchmarks in the planning phase.
- Inspect deliverables using the most appropriate tools.
- Accept or reject deliverables based on planned measures.



User Acceptance Testing

UAT is a chance for end users with knowledge of business processes to test the system and ensure it is ready for use.

Key Activities

- Test script creation,
- Test script execution,
- Issue tracking, and
- Final feedback collection.

Benefits of UAT

- Confirms readiness,
- Identifies gaps,
- Boosts user confidence, and
- Allows for training.

Common Challenges

- Time constraints and balancing day-to-day work.
- Identifying realistic test scripts.



STAGE 5

Closing and Evaluating



Lessons Learned

- Did we achieve our project goal? Meet our objectives?
- What did we do well? What could we have done better?
- Were there any problems we could have avoided? How?
- Were all the deadlines and milestones achieved?
- Were all the necessary steps included in the plan?
- Were any unnecessary steps included?
- Did we allow enough time? Were the right people involved?



Wrapping Things Up

- Finish administrative tasks.
- Make a formal announcement of completion.
- Thank team members and other participants.
- Celebrate!
- Help team members move on.

Putting It All Together

Imagine that have been asked to create a set of best practices for a coworker who is about to manage a project for the first time. Share some things you've learned that could help your coworker.



Best Practices



- Define the desired outcome.
- Explore options for achieving the outcome.
- Identify stakeholders.
- Assemble the right team.
- Communicate often.
- Develop a detailed project plan.
- Hold a launch meeting.
- Monitor the project carefully.
- Let everyone know the project is completed.
- Thank team members.
- Collect lessons learned.

Test Your Knowledge



Test Your Knowledge

What are the five stages of a project?



Test Your Knowledge

What are the five stages of a project?



Initiating and
Defining the
Project



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Closing and
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Test Your Knowledge

Which is the definition of a project?

A: Any activity that involves more than three people.

B: A task or activity that is done over a period of two months or more.

C: A temporary endeavor undertaken to create a unique product, service or result.


D: Any program that affects an entire organization.

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Test Your Knowledge

Which is a common reason that projects fail?

A: Lack of careful planning and underestimation.

B: Too many people on the project team.

C: Project scope is too ambitious.

D: Not everyone thinks it's a good idea.

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Test Your Knowledge

The background of the slide is a soft-focus photograph of various wooden toys. In the foreground, there are two cylindrical wooden blocks. Behind them, a stack of three rectangular wooden blocks is visible, with a smaller rectangular block on top. To the left, there is a wooden block shaped like a house. The entire scene is set on a light-colored wooden surface against a blurred green background.

Define stakeholders

Test Your Knowledge

Define stakeholders

People who have a vested interest
in the success of the project.

Test Your Knowledge

An effective project team includes:

A: The people who initiated the project.

B: People with a variety of skills and perspectives.

C: Managers and executives.

D: People who have plenty of free time.

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Test Your Knowledge

When creating a project schedule, it's better to overestimate than underestimate the time needed for a task or activity.

A: True

B: False

Test Your Knowledge

When creating a project schedule, it's better to overestimate than underestimate the time needed for a task or activity.



A: True

B: False

Test Your Knowledge

List one purpose of a project launch:



Test Your Knowledge

List one purpose of a project launch:

- Allows everyone involved to be introduced.
- Ensures everyone has the same understanding of project's importance, goals and roles of those involved.
- Presents opportunity to gain commitment from those key to project's success.

Test Your Knowledge

“Closing” a project refers to submitting a final report to management, turning off the lights, and going home.

A: True

B: False

Test Your Knowledge

“Closing” a project refers to submitting a final report to management, turning off the lights, and going home.

A: True



B: False

- Finishing administrative tasks.
- Making a formal announcement of completion.
- Thanking team members and other participants.
- Evaluating the project and collecting lessons learned.

Test Your Knowledge

Which is a question to ask when evaluating a project?

A: What would we have done if we'd had unlimited time and resources?

B: What have we learned that can help us improve future projects?


C: How can we make sure that everyone in the organization knows how great we are?

D: Which people should get credit for participating in this project?

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Questions?

