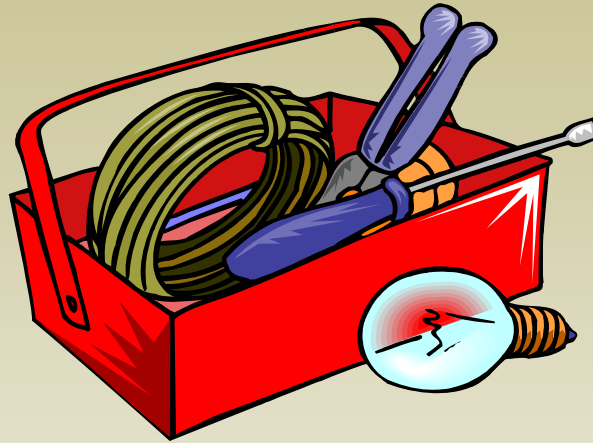


# What's In Your PM Toolbox?

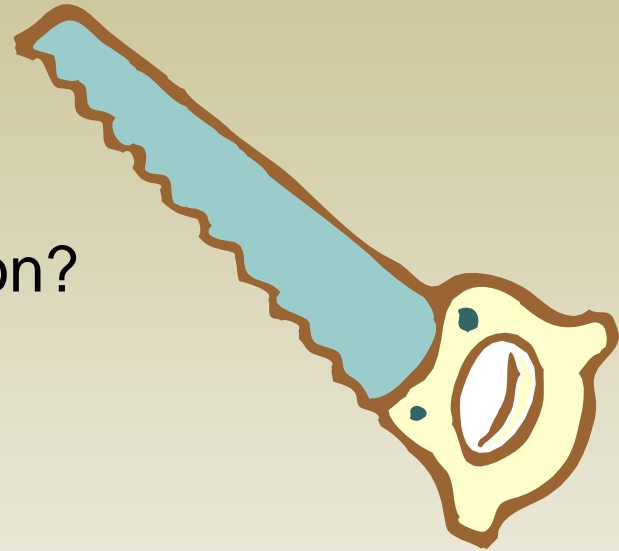


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November 11, 2010

# Objectives

- Why have this discussion?
- Definitions
- Sample tools
- Fill in the blanks
- Resources



# Why Have This Discussion?



- Story of real life example where a PM could not give an example of a “tool.”
- What else is out there on the net?
  - Books, Articles, Presentations

# What Is Project Management?



The application of knowledge, skills, tools, resources, and techniques to a broad range of activities to meet the requirements of the particular project.

# Let's Begin Looking At A Sample Set Of PM Tools



# Knowledge



- Ideas
- Brainstorming
- Historical records and artifacts
- Ask Questions (Has anyone done this before?)
- Think and plan **BEFORE** you act and build

# People

- Project Sponsor
- Project Team
- Fellow Project Managers
- Subject Matter Experts
- Technical or Business Buddies



# R&R Matrix

## Roles and Responsibility Matrix

	Steering Committee	Project Sponsor	Project Manager	Team Lead 1	Team Lead 2
Charter	A	D	C		
Scope Mgt Plan		A	D		
R&R Matrix			D		
WBS			D	C	C
Deliverables		A	R, A	D	C

A – Approves deliverable	C – Contribute to deliverable
R - Reviews the deliverable	N – Notified when deliverable is complete
D - Develop the deliverable	M - Manages deliverables

# The Kickoff Meeting

- To introduce the project
- Introduce team members to each other
- Review Roles and Responsibilities
- Review major deliverables
- Set expectations
- Team building activity
- Build momentum



# The Project Charter

The charter should be created by the sponsor with input from the Executive Management Team, the and the Project Manager.

The “typical” project charter is a document that:



- Formally authorizes the project
- Defines the scope, objectives, and participants
- Provides the project manager with the authority collect and use organizational resources

# The Project Objective Statement

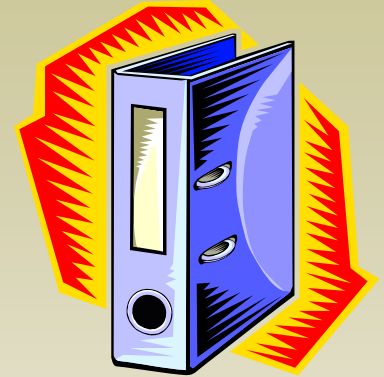
The POS is a brief statement that describes the project purpose and goals.



- Usually less than 25 words
- Should address Scope, Schedule, Resources
- Can be derived from the business case
- This statement will drive all aspects of project
- Copy the POS onto your various project documents

# The Project Plan

The Project Plan (usually kept in a binder) is a collection of all documents, sub-plans, and artifacts used during the duration of the project. It should be thought of as the “roadmap” to completing the project.



Collectively, these items define the artifacts and processes that will be used for establishing the milestones, deliverables, tasks, and due dates. Furthermore, the Project Plan will contain procedures that describe “how” processes and activities will be “managed.”

# The Process Groups And Knowledge Areas

## Process Groups

- I. Initiating
- II. Planning
- III. Executing
- IV. Controlling
- V. Closing

## Knowledge Areas

1. Integration
2. Scope
3. Time
4. Cost
5. Quality
6. Human Resources
7. Communications
8. Risk
9. Procurement

As defined by the Project Management Institute "A Guide To The Project Management Body Of Knowledge (PMBok) © 2004

# Scope Management



Project Scope Management focuses on defining and controlling all work areas of the project to ensure that the project will be accomplished successfully.

The main processes of Scope Management include: Scope Definition, Scope Planning, Scope Verification, Work Breakdown structure and Scope Control.

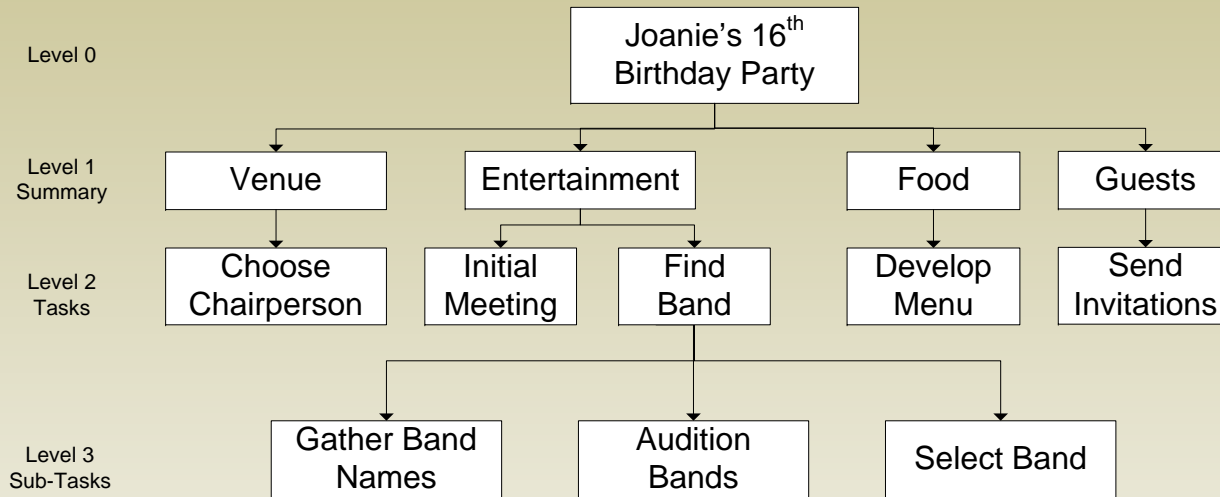
# Work Breakdown Structure

A “Work Package” is “task” at the lowest level of the WBS. It represents a level of work that a Project Manager can monitor and control.

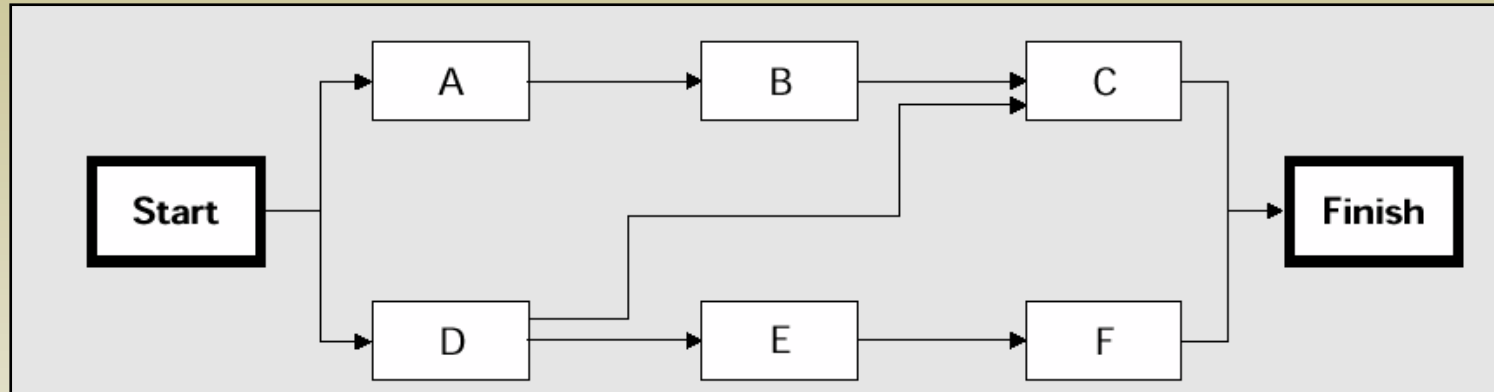
The WBS can be viewed in two different forms;

- Chart form
- Tabular form

# WBS Chart Form



# Program Evaluation and Review Technique (PERT) Chart



Activities on Node (AON) Diagram

- Activities on Arrow (AOA) Activities are represented by arrowed lines between the nodes or circles
- Activities on Node (AON) Activities are represented by nodes with the arrows representing the task dependencies. Also known as Precedence Diagramming Method (PDM).



# The Project Budget

As the Project Manager, you need to ask yourself the following:

- What will I be responsible for?
- How will I capture these costs?
- How will I summarize and present these costs?

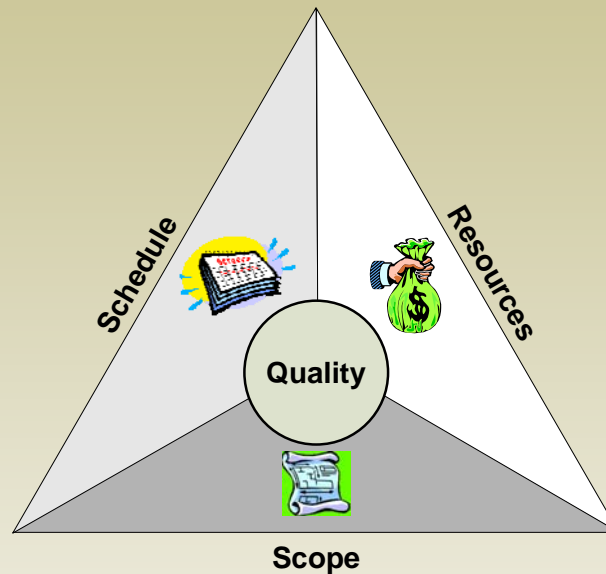


# Earned Value Management

*The process of considering scope, schedule, and resources, measured against a project's actual performance. It compares the planned amount of work to the completed tasks, to the projects' cost, to determine if the cost, schedule, and work completed (thus far) are all in synch and in accordance with the plan. This analysis will show past performance and will estimate future efforts to complete the project (with the desired results).*

\* This is an advanced topic.

# Quality And The Triple Constraint



**The Triple Constraint** seeks to balance the three elements of a project – **Resources**, **Scope**, and **Schedule**. These elements all have an impact on the project's quality.

# The RSS Matrix

The Resource, Scope, and Schedule Matrix

	Least	Somewhat	Most
Scope			X
Schedule		X	
Resources	X		

By using this matrix, decisions (can be made based on a priority level) which will allow a project manager to make adjustments based on priorities. The Project Sponsor must assign one “X” per column and one “X” per row.

# RTM

- The *Requirements Traceability Matrix (RTM)* is a tool to help ensure that the project's scope, requirements, and deliverables remain “as is” when compared to the baseline.
- Thus, it “traces” (or links) the deliverables, both forwards and backwards, by establishing a thread for each requirement- from the project's initiation to the final implementation.

# Requirements Traceability Matrix

Requirements Traceability Matrix

Req #	Name	RFP #	DDD#	PPT #	TS #	Verification
1	Calculate Interest	CGA 001	DDD 001	5.1.1 6.2.1	TS 001 TS 025	Yes / No
2						
3						

# Risk And Issue Management

**Risk Management** -The process involved with identifying, analyzing, and responding to a risk. It includes maximizing the results of positive events and minimizing the consequences of adverse events.



**Issue Management** -The process of identifying immediate problems and resolving them.

# Risk Database

**Project Name: Risk Log - Report Date: MM/DD/YYYY**

**Instructions:** Mark all changes in [blue](#).

Risk ID	Status	Title	Activity This Week	Description	Prob	Imp	Score	Risk Owner	Open Date	Impact Date	Strategy and Response	Contingency Plan
Proj #1-R001	Open	Title 1	MM/DD/YY:Enter Activity Here	Description 1	2	2	4.0	Name	MM/DD/YY	MM/DD/YY	Enter Here	Enter Here
Proj #1-R002	Open	Title 2	MM/DD/YY:Enter Activity Here	Description 2	3	3	9.0	Name	MM/DD/YY	MM/DD/YY	Enter Here	Enter Here
Proj #1-R003	Open	Title 3	MM/DD/YY:Enter Activity Here	Description 3	2	2	4.0	Name	MM/DD/YY	MM/DD/YY	Enter Here	Enter Here

# Project Control Points

**Project Control Point** – An event that is a scheduled, at several predetermined time intervals during the life of the project, and used for analyzing project status.

- Gather information: Resources, Scope, Schedule
- Interview team members
- Validate information
- Analyze data and variances
- Apply to Project Plan and sub-plans.

# Change Control

A collection of formal procedures that will define how project deliverables (and documents) will be controlled, changed, and approved.

A change control process is necessary to request, consider and decide on changes to schedule, scope and resources.

- Submit a change request form
- Assess the extent and impact of the change
- Seek approval and document the change

# Communication and Reporting

Identify, capture, collaborate, and communicate project, risk, and issue information in a format and timeframe that enables team members to take corrective action.

- Status Reports
- Risk Register
- Team Meetings
- Customer Meetings
- Invoicing



# Communication Matrix

What	Who/Target	Purpose	When/Frequency	Type/Method(s)
Initiation Meeting	All stakeholders*	Gather information for Initiation Plan	FIRST Before Project Start Date	Meeting
Distribute Project Initiation Plan	All stakeholders*	Distribute Plan to alert stakeholders of project scope and to gain buy in.	Before Kick Off Meeting Before Project Start Date	Document distributed via hardcopy or electronically. May be posted on project website or OIT Blackboard site. <b>PPM Templates:</b> Project Snapshot or "Lite" Initiation Plan
Project Kick Off	All stakeholders*	Communicate plans and stakeholder roles/responsibilities. Encourage communication among stakeholders.	At or near Project Start Date	Meeting
Status Reports	All stakeholders and Project Office	Update stakeholders on progress of the project.	Regularly Scheduled. Monthly is recommended for large/midsize projects.	Distribute electronically and post via web/OIT Blackboard site. <b>PPM Template:</b> Status Report

•\*Princeton Project Methodology (PPM)

# Software

- MS Project
- MS SharePoint
- Time Tracking
- Project Accounting
- Risk and Issue Trackers
- Wiki



# What Else?

- Project Checklists
- Metrics
- ?
- ?
- ?
- ?



# Resources

- [www.carlosconsulting.com](http://www.carlosconsulting.com)
- [www.allpm.com](http://www.allpm.com)
- [www.4pm.com](http://www.4pm.com)
- [www.ganttthead.com](http://www.ganttthead.com)
- [www.pmhut.com](http://www.pmhut.com)
- Google search on “sample abcdefg template”
- Educational institutions
- Public Sector Govt departments
- Colleagues and Friends



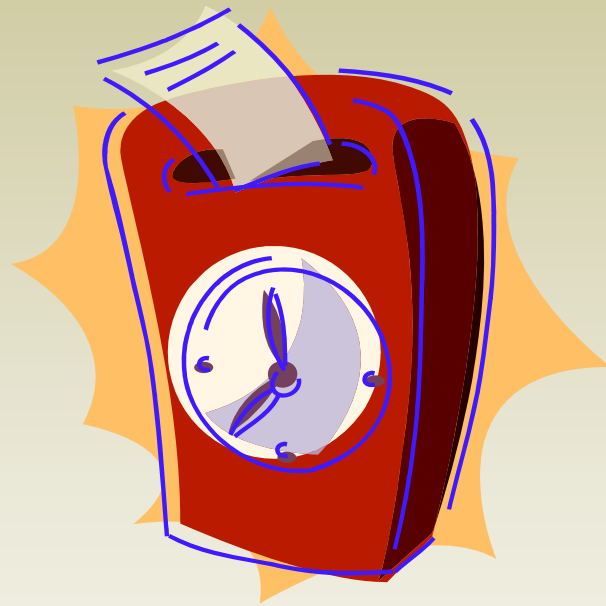
# The Next Step

So what do I do now?

- Visit the reference web sites and read the articles
- Search for sample templates
- Assemble and build a library of tools
- Apply what you've learned to a simple project



# Wrap Up, Questions



# References

- [www.carlosconsulting.com](http://www.carlosconsulting.com)
- <http://productivebydesign.net/?p=751>
- <http://www.svprojectmanagement.net/?p=1093>
- <http://www.pmttoolbox.com/>
- <http://www.smashingmagazine.com/2008/11/13/15-useful-project-management-tools/>
- **Project Management ToolBox: Tools and Techniques for the Practicing Project Manager** Author: Dragan Z. Milosevic

**Thank you !!**

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