

# OIT Project Management Day 1

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### Project Management Definitions

Term	Definition
<b>Assumptions</b>	Documents the important conditions of the project environment that are considered to be fundamental. Essentially, project assumptions are low probability risks.
<b>Critical Path</b>	The sequence of scheduled activities that determines the duration of the project. Represents the minimum amount of time needed to complete a project.
<b>Dependencies</b>	Dependencies establish the links, and the type of links, between all the tasks of a project. A task dependency occurs when one task determines the timing of another task.
<b>Goals</b>	The concrete accomplishments that will accomplish the project's mission.
<b>Milestones</b>	A marker for the completion of a key phase of a project.
<b>Mission</b>	A brief description of why the project is being undertaken, and the benefits it hopes to achieve.
<b>Planning Fallacy</b>	The tendency for people and organizations to underestimate how long they will need to complete a task.
<b>Project</b>	A temporary group activity designed to produce a unique product, service or result.
<b>Project Management</b>	The application of knowledge, skills and techniques to execute projects effectively and efficiently.
<b>Project Plan</b>	A statement of the scope, objectives, and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager. It serves as a reference of authority for the future of the project.
<b>Risk Analysis</b>	The identification, assessment, and prioritization of risks that may impact the project, in order to inform action planning.
<b>Scope</b>	The features and functions that characterize a product, service, or result.
<b>Sponsor</b>	An organizational leader who is responsible for success of the project, and who is most interested in the project's success.
<b>Stakeholder</b>	Anyone that has an interest in or will be impacted by the project.
<b>Stakeholder Analysis</b>	The process of identifying the individuals or groups that are likely to affect or be affected by a proposed action, and sorting them according to their impact on the action and the impact the action will have on them. This information is used to assess how the interests of those stakeholders should be addressed in a project plan, policy, program, or other action.
<b>Task Dependencies</b>	Work that must be completed before work can begin on a given task.
<b>Triple Constraint</b>	Time, cost, and quality. Project scope should be limited to what can be accomplished within these constraints.
<b>Work Breakdown Structure</b>	A hierarchical analysis of the tasks needed to accomplish milestones and project goals.

## Program Outline: Day 1 Planning

- Definitions and Success Factors
- Project Plans
- Stakeholder Management
- Work Analysis

## Program Outline Day 2: Project Implementation and Closure

- Implementation Tools
- Interpersonal skills during implementation
- Closure:
  - Post project review
  - Celebrations

## DEFINITIONS AND SUCCESS FACTORS

### Definitions



- **Project:**  
a temporary group activity designed to produce a unique product, service or result.
- **Project Management:**  
the application of knowledge, skills and techniques to execute projects effectively and efficiently.

## Project Successes and Disasters

- Pair up
- Take turns sharing project disaster stories
- What factors led to their failure?
- Now share project success stories
- What factors led to their success?

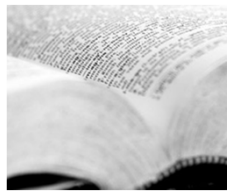
### A SIMPLE MODEL FOR MANAGING COMPLEX CHANGE

Vision <small>a formal statement that expresses the aspirations and goals of a company or organization</small>	Skills <small>the ability to do something well, usually gained through training or experience</small>	Incentives <small>something that encourages or motivates somebody to do something</small>	Resources <small>somebody or something that is a source of help or information</small>	Plan <small>a method of doing something that is worked out in advance</small>	
X	✓	✓	✓	✓	= Confusion
✓	X	✓	✓	✓	= Anxiety
✓	✓	X	✓	✓	= Gradual Change
✓	✓	✓	X	✓	= Frustration
✓	✓	✓	✓	X	= False Starts
✓	✓	✓	✓	✓	= Change

## Planning

- Project Plan
  - A compelling mission statement
  - SMART Goals
  - Assumptions
  - Risks
  - Constraints
  - Deliverables
  - Milestones

## Project Plan



a statement of the *scope*,  
*objectives*, and  
*participants* in a project.

It provides a preliminary delineation  
of *roles and responsibilities*,  
outlines the project *objectives*,  
identifies the main *stakeholders*,  
and defines the authority of the  
project manager.

## Project Plan Components

- Mission
- Scope/Goals
- Assumptions
- Constraints
- Deliverables
- Stakeholder Analysis
- Communications Plan

## Project Mission



*"If you don't know where you are going, you might wind up someplace else." - Yogi Berra*

- Describes why the project is being undertaken, and the benefits it hopes to achieve.

## Example: Performance Development Mission Statement

- Employees need to have:
  - clear guidance about what is needed for success in their roles,
  - honest feedback about how they are performing in them, and
  - concrete plans for professional development.
- A structured performance development program can play an essential role in insuring the consistency and quality of this guidance, feedback, and planning.

## Your Turn!

- Write a mission statement for your project.
- Pair up and share your statement with your partner.
- Get feedback on your mission statement from your partner (strengths, opportunities for improvement)



## Mission Statement

Mission statements should be:

- **Brief:** You could say it in the course of a ride up an elevator with someone.
- **Concrete:** The project is described in terms that are immediately graspable by your audience.
- **Impactful:** The benefits of the project are vividly described.

and should answer the following questions:

- **What?** What are the project's objectives?
- **Why?** Why are we doing this?
- **How?** How will we achieve the project's objectives?

In the space below, write a mission statement for your project:

## Scope / Goals



## Project Goals

- Goals are the concrete accomplishments that will accomplish the project's mission.



## Project Goal Example

- *"upgrade the helpdesk telephone system by December 31 to achieve average client wait times of no more than two minutes"*

## Your Turn!

- Write one of the goals for your project. Make sure it meets all of the SMART criteria.
- Pair up with someone else, and share the goal you've written.
- Get feedback from your partner.

## SMART Goals

Goals are the concrete achievements that will fulfill the project's mission. Ideally, goals are:

- Specific
- Measureable
- Attainable
- Relevant
- Time Bound

In the space below, write one of the goals of your project.

## Assumptions

- Project assumptions are important conditions of the project environment that are considered to be fundamental. Essentially, project assumptions are low probability risks.

## Assumptions: Examples

- Current staffing levels will continue for the duration of the project.
- The project has the full support of the project sponsor.
- The legal office will be available to review and assist in finalizing contract language.

## Assumptions: Your Turn

- Read the announcement about the Weston Field renovation project.
- If you were the project manager, what would you list as assumptions on the project plan?

## Starting the Weston Field Project

To the Williams Community,

I write with the great news that the Weston Field renovation project is now going ahead.

Those of you who were at Williams in 2008 recall that one of the first steps the college took in response to the global financial crisis was to suspend two capital projects that were about to begin. One was to build the new Sawyer Library, including the renovation of Stetson Hall; the other was the renovation of Weston.

The Sawyer work began when we were able to meet our new ground rule of starting a large capital project only after we've underwritten most of the cost through philanthropy.



With Weston, we used the intervening time to re-imagine the once-in-a-lifetime possibilities the project afforded. What had been an effort to address deficiencies and squeeze a new building between two playing fields became a holistic look at how the complex could best support our approach to athletics, with its emphasis on broad participation and excellence within Division 3. The committee arrived at an approach that not only succeeds in that way, but also puts greater emphasis on green design and on the environmental stewardship of the surrounding area.

The project will provide much-needed facilities for varsity field hockey, football, men's and women's lacrosse, and men's and women's track as well as for recreational use. Those facilities will be safer and more inviting for both athletes and fans. The project will also free up space on Cole Field for junior varsity, club, intramural, and recreational use. And we'll finally be able at Weston to decommission the bathrooms first used in the Middle Ages.

The new project has attracted enough philanthropy toward its \$22 million cost that the Board of Trustees this weekend voted to proceed.

Every effort will be made to complete the detailed design work in time to begin construction after the 2013 fall season and finish it in time for the following fall. The design work will be overseen by a Weston Athletic Complex Project Committee, co-chaired by Will Dudley, provost and professor of philosophy, and Lisa Melendy, athletic director.

Our thanks go to the many people who have had a hand in this project over the years and, of course, to the alumni

and parents whose financial support enables us to begin this exciting work.

Regards,  
Adam Falk  
President



## **Project Management**

### **Assumptions**

If you were the project manager for the Weston field, what would you list as assumptions on the project plan? List at least 3 assumptions:

1.

2.

3.

## Risks

- Risk: An event that would have significant consequences for the project if it were to occur.
- Risk Analysis: The identification, assessment, and prioritization of risks that may impact the project, in order to inform action planning.

## Risk Likelihood and Consequences

Likelihood	Consequences				
	Insignificant	Minor	Moderate	Major	Severe
Almost certain	M	H	H	E	E
Likely	M	M	H	H	E
Possible	L	M	M	H	E
Unlikely	L	M	M	M	H
Rare	L	L	M	M	H

## Risks: Example

- Obamacare
  - States may not accept the subsidized expansion of Medicaid that is a key component of guaranteeing universal insurance for all Americans.
  - States may not create their own health insurance exchanges, greatly increasing the load on the national exchange website.

## Risks: Your Turn

- Complete the risk worksheet for your project.

## Project Management

### Risk Analysis Worksheet

Choose a significant risk for your project and answer the questions about them.

Risk: \_\_\_\_\_

Where is this risk on the likelihood/impact grid?

Likelihood	Impact					
		Insignificant	Minor	Moderate	Major	Severe
	Almost Certain					
	Likely					
	Possible					
	Unlikely					
	Rare					

What specifically would be the impact of the risk on the project if it were to occur?

Who needs to know about this risk?

What can you do to reduce the risk that the event will happen?

What can you do to reduce the impact of the risk on the project, should it occur?

## Constraints

- Time
- Quality
- Cost

Some account of all 3  
should be in your  
project plan.



## Constraints: Example

- Weston Field

Time	Project must be completed in time for the first football game of 2014.
Cost	\$22 million
Quality	[inspection requirements]

## Constraints: Your Turn

- Using the worksheet, specify what you know about the triple constraint for your project.

## Project Management

### Constraints

Include as much information as you know about the project constraints for your project.

**Time**

**Cost**

**Quality**

## Deliverables

- A tangible, measurable, and specific product or service delivered from the project team to a client or project sponsor.

## Deliverables: Examples

- Software releases
- A program evaluation report on a training program.
- Increase profitability of a product by 3% as indicated on the company balance sheet.



## Deliverables: Your Turn

- What are the deliverables for your project?

## Project Management

### Deliverables

List the deliverables for your worksheet and complete the table.

What	By When	To Whom

## STAKEHOLDERS

### Stakeholders

- Stakeholder: anyone that has an interest in or will be impacted by the project.
- Stakeholders have various degrees of power and influence, attitudes towards the project, hopes and fears, strengths and limitations, etc.
- Communication is the key to stakeholder management



## The Project Sponsor: A Key Stakeholder

- Ultimately accountable for the project's success.
- Authorizes the resources used for the project
- Makes important decisions about the project along the way.

## Stakeholders: Other Examples

## Stakeholders: Your Turn

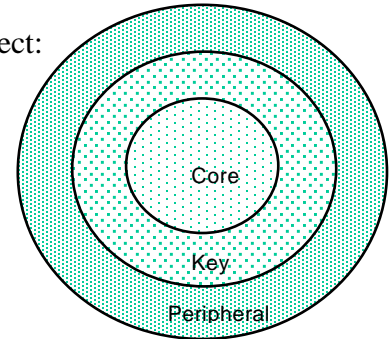
- Choose a stakeholder for your project and complete the stakeholder analysis.

## Stakeholder Analysis

**Project:** \_\_\_\_\_

**Stakeholder:** \_\_\_\_\_

Using this bulls-eye, mark how critical this stakeholder is to your project:



What are this stakeholder's hopes for the project?

What are their fears for the project?

What strengths, qualities, or resources can this stakeholder bring to your project?

What limitations of this stakeholder most concern you?

How much political power or influence does this stakeholder have?

1 Minimal	2	3	4	5 Middling	6	7	8	9	10 High

How opposed or in favor of the project is this stakeholder?

1 Strongly Opposed	2	3	4	5 Neutral	6	7	8	9	10 Strongly In Favor

Based on what you know of this stakeholder, what strategies could you use to best enlist them for your project? How will you communicate with them? How often?

## RACI Chart

- Divides stakeholders into 4 types:
  - **Responsible:** The doers of the project, and especially the project lead.
  - **Accountable:** The buck stops here. Often the project sponsor.
  - **Consulted:** Stakeholders whose expertise is required or whose needs must be understood.
  - **Informed:** Stakeholders who are not directly involved in the project activity, but need to know what is going on.

## RACI Chart Example

	Facilities Mgr	Plant Mgr	HR	Security	Project Mgr
Identify a minimum of three asphalt contractors from Angle's List	C	-	-	-	R
Arrange for contractor visits and quotes	I	-	-	-	R
Review quotes and references, make contractor selection	A	I	I	-	R
Review and finalize contract, lock in plant shutdown week	I	I	-	-	R
Provide security gate access codes for asphalt crew by June 15	I	-	A	R	I
Communicate project to shutdown maintenance crew, make sure all vehicles are removed from the lot	I	I	R	I	I
Provide security gate access codes for asphalt crew by June 15	I	-	A	R	I
Oversee the project during the plant shutdown week, ensure it is completed on time	A	I	I	-	R

R = Responsible, A = Accountable, C = Consulted, I = Informed

## RACI Chart: Your Turn

- In the left column, fill in the main phases of your project.
- In the top row, fill in at least 3 key stakeholders of your project.
- Complete the RACI chart.



# Project Management

## RACI Chart

Project Phases	Stakeholders				

**R**= Responsible; **A**=Accountable; **C**=Consulted; **I**=Informed

## Communications Plan

- Key Principle:
  - Take the **maximum** amount of communication you think is necessary in any situation.
  - Multiply by **10**.
  - That's the **minimum**.
- If you're wondering whether someone might need to know something, they probably do.
- Plan how frequently you'll communicate with each stakeholder.

## Communications Plan: Your Turn

- Complete the communications plan worksheet.

## Project Management

### Communications Plan

Stakeholder 1: \_\_\_\_\_

What information does this stakeholder need to know? If the information should be communicated, circle what which the communication will take:

Information Type	Format
The project plan itself	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Changes to the scope of the project.	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Changes to constraints on the project (time, cost, quality standards).	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Achieving key milestones on the project.	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Project team minutes.	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A

Information Type	Format
Emergence of project issues or risks, and strategy for handling.	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Project completion.	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Other:	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Other:	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A
Other:	1:1 meeting Meeting with other stakeholders email Printed document. Project website. Other: N/A

## **WORK ANALYSIS**

### Work Analysis

- Milestones
- Planning Fallacy
- Work Breakdown Structure
- Dependencies
- Gantt Chart

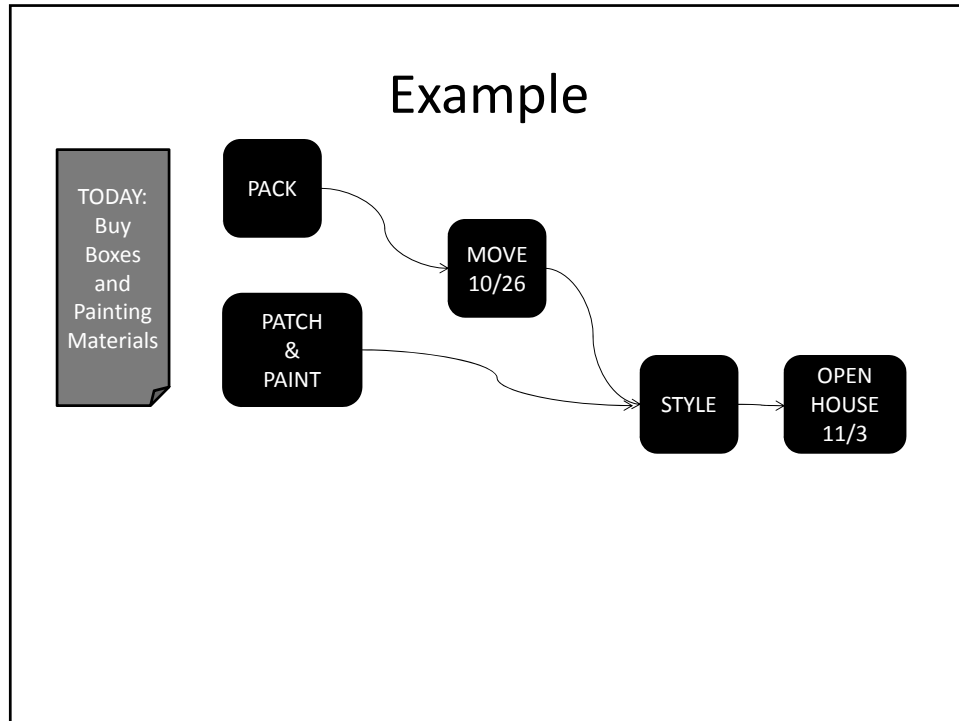
## Milestones

- Mark the completion of key phases of the project.
- Aid in gauging the timeliness of project completion.
- Create an occasion for mini-celebrations



## Example





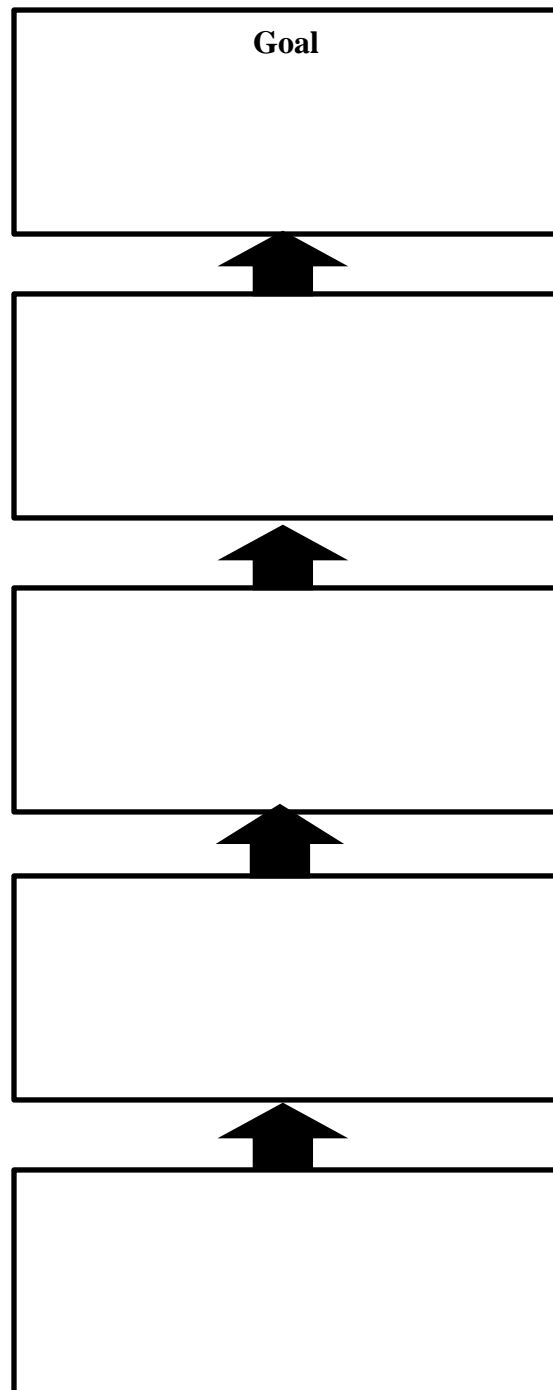
## Milestones: Your Turn

- What are the key milestones of your project, and the deadlines associated with them?

## Project Management

### Milestones

To develop milestones for your project, visualize the successful completion of the goal. What will need to happen for that goal to be achieved? Keep working backwards until you get to the milestone you can work on now.



Work downward until you reach the milestone for the project you are working on now.



## Beware the Planning Fallacy

- The first edition of the Oxford English Dictionary was scheduled to take two years to complete...
- Five years later they had only reached the word "ant."
- Psych. research has shown we systematically underestimate how long it will take to achieve goals.



"I'm going to finish my novel before springtime if it's the last thing I do," thought Quigley.

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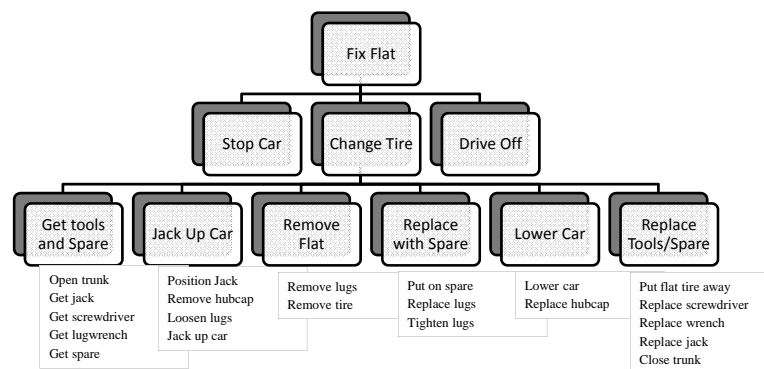
## Addressing the Planning Fallacy

- Others are more accurate at predicting than we are ourselves, so ask a colleague for a time estimate.
- Or:
  - Make a prediction now, later see how accurate it was.
  - In the future, multiply your time estimate by your personal planning fallacy multiple.

## Work Breakdown Structure

- Work Breakdown Structure

## Work Breakdown Structure: Example



## Work Breakdown Structure: Your Turn

- Create a work breakdown structure for your project.

## **Project Management**

### **Work Breakdown Structure**

In the space below, sketch out a draft work breakdown structure for your project.

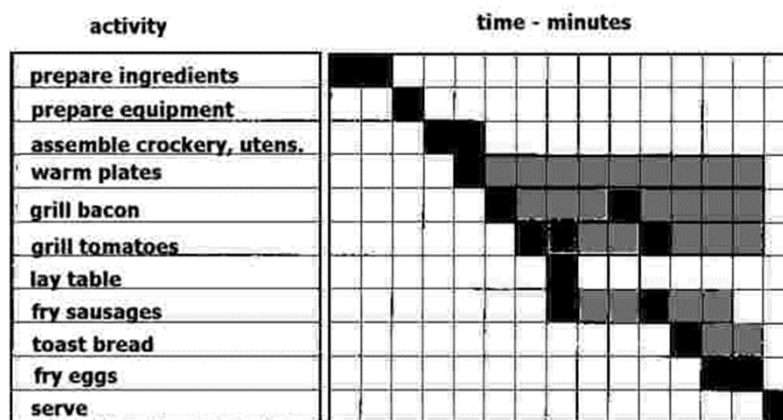
## Dependencies

- Dependencies create links between tasks.
- A task dependency occurs when one task determines the timing of another task.
- Most common: finish to start – one task finishes, another task starts.



## Gantt Charts

- Graphically represent project activities on a timeline.



## Homework 1

- By the end of the day, you'll receive a link to a playlist of Project Management tutorials on Lynda.com.
- Spend at least 30 minutes watching videos that are most interesting to you.
- Be prepared to share what you learned at the next session.

## Homework 2

- Prepare a document identifying all of the projects you are involved in, and giving at a minimum:
  - The mission of each project
  - The deliverables associated with the project
  - Milestones associated with the project.
- Discuss the document with your supervisor