Project Management for Everyone
Contact Information
Project Management for Everyone

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Business Management & Analysis Group
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Objectives
Project Management for Everyone

- Basic understanding of project management principles
- Share tools and techniques of formal project management that can be used in daily tasks and projects
Project Management Principles

Project Management for Everyone
PMI is an aggregation of best practices from thousands of professional project managers.

Principles in this session are based on PMI methodologies, there are other methodologies.

Organizations typically use these as a basis for developing custom project management processes.

www.pmi.org
GW MS in Project Management

Project Management for Everyone

business.gwu.edu/programs/specialized-masters/mspm/
Definition of a Project

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

**Temporary / Not Ongoing**
- Definite beginning and end
- Does not mean a short duration

**Unique**
- Outcome is a unique deliverable
- Could come in the form of either products, services or results
Project Life Cycle
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The Five Project Phases

Initiating → Planning → Monitoring & Controlling → Executing → Closing
Project Management Functions

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- Scope Management
- Time Management
- Cost Management
- Quality Management
- HR Management
- Communications Mgt
- Risk Management
- Procurement Mgt
- Project Integration

~ PMI refers to these as Knowledge Areas ~

Things done within the phases to manage the project
Triple Constraints
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~ Managing these is the primary responsibility of the PM ~
PM in Practical Terms
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Initiating

**Define**
Clarify the request and objectives

**Plan**
Develop the specific approach

Planning

Executing

**Manage**
Task, action, communication & resource management

Monitoring & Controlling

**Review**
Were expectations met?
What are some struggles often experienced in projects?
Define
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- Clarify the request / initiative
- Identify stakeholders
- Define the requirements
Define - Clarification
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Project Charter

Defines high-level scope, exclusions, objectives, milestones & timeline

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Email / Memo

• Document objectives
• Send to requester to validate
• Writing down helps clarify
• Get agreement!!
Define - Identify Stakeholders

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Project Stakeholder

People or groups positively or negatively affected by the project outcome.

Stakeholders may or may not exert direct influence over the project.
Define - Identify Stakeholders

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Stakeholder Matrix

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Department</th>
<th>Category</th>
<th>Contact</th>
<th>Impact (H/M/L)</th>
<th>Influence (H/M/L)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adam Donaldson</td>
<td>Manager</td>
<td>Business Management &amp; Analysis Group</td>
<td>Project Team</td>
<td>202-994-6867 <a href="mailto:adonald@gwu.edu">adonald@gwu.edu</a></td>
<td>H</td>
<td>M</td>
</tr>
<tr>
<td>Dave Green</td>
<td>Executive Director</td>
<td>Business Management &amp; Analysis Group</td>
<td>Project Owner</td>
<td>202-994-4151 <a href="mailto:dgreen@gwu.edu">dgreen@gwu.edu</a></td>
<td>M</td>
<td>M</td>
</tr>
<tr>
<td>John Doe</td>
<td>Director</td>
<td>Division of IT</td>
<td>Web Development</td>
<td>202-555-1212 <a href="mailto:john_doe@gwu.edu">john_doe@gwu.edu</a></td>
<td>H</td>
<td>M</td>
</tr>
<tr>
<td>Jane Doe</td>
<td>Manager</td>
<td>External Relations</td>
<td>Content Validation</td>
<td>703-555-1212 <a href="mailto:jane_doe@gwu.edu">jane_doe@gwu.edu</a></td>
<td>L</td>
<td>H</td>
</tr>
</tbody>
</table>

- Identify and track key stakeholders
- Determine Impact & Influence to gauge how to manage
- Ensure thoroughness of communications planning
Define - Requirements
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**PM Tool**

Requirements Document

Documents the “what” of the initiative / task and breaks into individually deliverable items

**Everyday Tool**

Requirements List

<table>
<thead>
<tr>
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<th>Requirement Name / Description</th>
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</tr>
</thead>
<tbody>
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<td>Department web page modifications shall conform to design standards set forth by External Relations</td>
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<td>News and home page content updates will include information and occurrences which have happened within the previous 6 months</td>
<td>Content</td>
</tr>
<tr>
<td>3</td>
<td>Department managers will approve all content and design modifications</td>
<td>Governance</td>
</tr>
<tr>
<td>4</td>
<td>Organization chart and contact information shall be validated and made current as of the date of publishing to the web site</td>
<td>Content</td>
</tr>
<tr>
<td>5</td>
<td>Time and date of the last update shall be displayed to the users</td>
<td>Content</td>
</tr>
</tbody>
</table>

- List the “what” items required in the final solution
- Iterative process often requiring multiple interviews
- Critical to defining the solution
Define
Project Management for Everyone

- Clarification Memo
- Stakeholder Matrix
- Requirements List
Plan
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☐ Organize and plan
☐ Determine tasks to be done
☐ Create a schedule
☐ Plan communications
Plan – Project Management Plan
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Establishes plan for planning, execution, monitoring & closing, including all subsidiary plans

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Project Management Plan

Project Workbook
“Project” Workbook
Project Management for Everyone

- Include all “project” information
  - Scope / Objectives
  - Stakeholders / Contacts
  - Requirements
  - Schedule, Milestones & Deliverables
  - Action Items and Issues

- Central location for all project info
  - Excel workbook or other similar tool
  - Local / Shared Folder

- Living document

- Serves as a template / historical artifact for similar future endeavors
Plan – Work Breakdown Structure

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- Breaks deliverables into manageable work packages
- Ensures we don’t forget or omit important tasks

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“Treasury & BMAG Website Updates”

Control Account Level

Content Development

Website Development

Website Development

BMAG Page Updates WBS 1.1

Treasury Page Updates WBS 1.2

Departmental Org Chart Updates WBS 1.3

Home Page Updates WBS 1.4

Graphics Design WBS2.1

Verification of Positions WBS 1.3.1

Name / Contact Information Updates WBS 1.3.2

Creation of Updated Org Charts WBS 1.3.3

Planning Package Level

Work Package Level

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Plan – Schedule
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Formal Project Schedule

Sequences & defines project tasks and monitors status of project against milestones / baselines

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Task List / Schedule

Everyday Tool

Sequences & defines project tasks and monitors status of project against milestones / baselines
Plan – Schedule
Project Management for Everyone

Task List / Schedule

<table>
<thead>
<tr>
<th>ID</th>
<th>Task</th>
<th>Start</th>
<th>Finish</th>
<th>Deadline</th>
<th>Work</th>
<th>Duration</th>
<th>% Cmpl</th>
<th>Predecessors</th>
<th>Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Verification of Positions</td>
<td>3-Nov</td>
<td>5-Nov</td>
<td>-</td>
<td>4 hrs</td>
<td>2 days</td>
<td>10%</td>
<td></td>
<td>Jane Doe</td>
</tr>
<tr>
<td>2</td>
<td>Name / Contact Info Updates</td>
<td>5-Nov</td>
<td>8-Nov</td>
<td>-</td>
<td>2 hrs</td>
<td>1 day</td>
<td>0%</td>
<td>1</td>
<td>Jane Doe</td>
</tr>
<tr>
<td>3</td>
<td>Creation of Updated Org Charts</td>
<td>9-Nov</td>
<td>12-Nov</td>
<td>-</td>
<td>16 hrs</td>
<td>4 days</td>
<td>0%</td>
<td>2</td>
<td>John Doe</td>
</tr>
<tr>
<td>4</td>
<td>Receive approval from dept Director on Org Chart updates</td>
<td>15-Nov</td>
<td>16-Nov</td>
<td>-</td>
<td>2 hrs</td>
<td>2 days</td>
<td>0%</td>
<td>3</td>
<td>Adam Donaldson</td>
</tr>
<tr>
<td>5</td>
<td>Upload of Org Charts onto Web</td>
<td>17-Nov</td>
<td>17-Nov</td>
<td>18-Nov</td>
<td>2 hrs</td>
<td>0.25 days</td>
<td>0%</td>
<td>4</td>
<td>Jane Doe</td>
</tr>
</tbody>
</table>

- Excel or other common tool
- Turn WBS work packages into tasks
- Clearly identify major milestones
- Identify dependencies – one task which relies on another
Plan – Communications Matrix
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Communications Plan
Documents the detailed plan for communicating with all stakeholders

Communications Matrix

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Everyday Tool
Communications Matrix

Plan – Communications Matrix
Project Management for Everyone

Communications Matrix

<table>
<thead>
<tr>
<th>#</th>
<th>Communication</th>
<th>Medium</th>
<th>Delivery Date</th>
<th>Frequency</th>
<th>Audience</th>
<th>Reviewer</th>
<th>Owner</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Notification of department heads of efforts to update web</td>
<td>Email</td>
<td>5-Nov</td>
<td>One-Time</td>
<td>Directors in Finance</td>
<td>Jane Doe</td>
<td>John Doe</td>
<td>Open</td>
</tr>
<tr>
<td>2</td>
<td>Solicitation to entire department for content</td>
<td>Email</td>
<td>8-Nov</td>
<td>One-Time</td>
<td>Finance</td>
<td>Jane Doe</td>
<td>John Doe</td>
<td>Open</td>
</tr>
<tr>
<td>3</td>
<td>Communicate changes to UWS / External Relations</td>
<td>Meeting</td>
<td>12-Nov</td>
<td>Bi-Weekly</td>
<td>IT, External Relations</td>
<td>N/A</td>
<td>Adam Donaldson</td>
<td>Open</td>
</tr>
<tr>
<td>4</td>
<td>Department web content update review</td>
<td>Meeting</td>
<td>8-Nov</td>
<td>Weekly</td>
<td>Finance</td>
<td>N/A</td>
<td>Adam Donaldson</td>
<td>Open</td>
</tr>
<tr>
<td>5</td>
<td>Status Report</td>
<td>Memo</td>
<td>9-Nov</td>
<td>Weekly</td>
<td>Finance SAVP</td>
<td>John Smith</td>
<td>Jane Doe</td>
<td>Open</td>
</tr>
</tbody>
</table>

- Target communications towards stakeholders identified
- Consider both “internal” and “external” communications
- One of the most vital efforts in any project
Plan
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☑ Project Workbook
☑ Work Breakdown Structure (WBS)
☑ Task List / Schedule
☑ Communications Matrix
Manage
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- Executing schedule tasks
- Managing action items & issues
- Report status
Manage – Actions & Issues
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Action & Issues Register

<table>
<thead>
<tr>
<th>Action #</th>
<th>Priority</th>
<th>Description</th>
<th>Owner</th>
<th>Open Date</th>
<th>Est Complete Date</th>
<th>Status</th>
<th>Close Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>Med</td>
<td>Check with Dave on the direction we want to go for language on the home page</td>
<td>Adam</td>
<td>10/20/11</td>
<td>10/26/11</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Med</td>
<td>Verify that we can do rotating pictures and bios on the “about us” page</td>
<td>Bill</td>
<td>10/15/11</td>
<td>10/29/11</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>High</td>
<td>Setup meeting with SAVP to receive approval on overall design.</td>
<td>Dave</td>
<td>10/15/11</td>
<td>11/5/11</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>35</td>
<td>Low</td>
<td>Gather bios and pictures from each team member for “about us” page</td>
<td>Adam</td>
<td>10/20/11</td>
<td>11/15/11</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Med</td>
<td>Verify that organization charts can be completed by the required deadline.</td>
<td>Adam</td>
<td>10/20/11</td>
<td>11/2/11</td>
<td>Open</td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>Med</td>
<td>Setup meeting with External Relations to review the overall design</td>
<td>Dave</td>
<td>10/20/11</td>
<td>11/19/11</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>

• Log and track all actions and issues – ensures accountability
• Tasks are scheduled – Action Items “pop up”
Communicate – Status Report
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Project Status Report

Email / Memo

Provides succinct information conveying timelines, progress, issues & next steps
Communicate – Status Report
Project Management for Everyone

Office of Finance
Project Status Report
May 2010

Project Management Life Cycle (PMLC)
Implementation of a cross-organizational project management process designed to provide methodology, artifacts and terminology to projects involving I/P&T.

Project Owner: Adam Donatoni
Project Manager: Adam Donatoni
Phase: Development
RINL: Low

Description
Timeline
Progress
Deadlines
Issues
Next Steps
Manage
Project Management for Everyone

☑ Schedule & Project Workbook
☑ Action & Issues Register
☑ Status Report
Review
Project Management for Everyone

☐ Discuss what went right & wrong

☐ Hold final review
Review – Lessons Learned
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Lessons Learned Document

\[\text{Lessons Learned Document}\]

- Gather key participants to discuss lessons learned
- Capture important lessons which could help others engaged in similar activity

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Email / Memo

Formally documents lessons learned throughout the project by phase
Review – Final Review
Project Management for Everyone

PM Tool
Project Approval Document

Everyday Tool
Review of Project Workbook

Documents formal signature approval of the project

The George Washington University
Project Approval Document

Project Transition Document

<table>
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<td>News and home page content updates will include information and occurrences which have happened within the previous six months</td>
<td>Content</td>
<td>Information contained on the front page needs to be timely and current in order to encourage users to continually return</td>
</tr>
<tr>
<td>Department managers will approve all content and design modifications</td>
<td>Governance</td>
<td>Ensures all website updates have been approved by all department managers</td>
</tr>
<tr>
<td>Organization chart and contact information shall be validated and made current as of the date of publishing the website</td>
<td>Content</td>
<td>Provides the most current organization information available to users of the website</td>
</tr>
<tr>
<td>Time and data of the last update shall be displayed to the users</td>
<td>Content</td>
<td>Allows users to understand the currency of the information being presented</td>
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### Review – Final Review

**Project Management for Everyone**

- Review objectives & requirements
- Discuss plan to close open actions
- Review lessons learned

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**Example Project Workbook - Microsoft Excel**

<table>
<thead>
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</tr>
<tr>
<td>3</td>
<td>Department managers will approve all content and design modifications</td>
<td>Governance</td>
<td>Ensures all website updates have been agreed to by the entire department</td>
</tr>
<tr>
<td>4</td>
<td>Organization chart and contact information shall be validated and made current as of the date of publishing to the website.</td>
<td>Content</td>
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</tr>
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Review
Project Management for Everyone

☑️ Lessons Learned
☑️ Project Workbook
Summary
Project Management for Everyone

✓ Project Management Concepts
  • Definition of a project
  • Project Lifecycle
  • Project Management Functions
  • Triple Constraints
Summary
Project Management for Everyone

Project tools for everyday tasks & projects

- **Define**
  - Clarification Memo
  - Stakeholder Matrix
  - Requirements List

- **Plan**
  - Project Workbook
  - Work Breakdown Structure
  - Schedule
  - Communications Matrix

- **Manage**
  - Schedule / Proj Workbook
  - Actions & Issues Register
  - Status Report

- **Review**
  - Lessons Learned
  - Project Workbook

- **Closing**
Questions
Project Management for Everyone
Thank You!!!
Project Management for Everyone

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