Introduction to Project Management

The Project Management Institute (PMI) Approach

Cindy Zak, MS RHIA, PMP, FAHIMA

May 2019
Session Objectives

- Defining the Project
- Organizing the Project
- Planning the Project
- Controlling the Project
- Ending the Project
# Project Management Knowledge Areas

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Project Integration Management</td>
<td>4.1 Develop Project Charter</td>
<td>4.2 Develop Project Management Plan</td>
<td>4.3 Direct and Manage Project Work</td>
<td>4.4 Monitor and Control Project Work</td>
<td>4.5 Perform Integrated Change Control</td>
</tr>
<tr>
<td>5. Project Scope Management</td>
<td>5.1 Plan Scope Management</td>
<td>5.2 Collect Requirements</td>
<td>5.3 Define Scope</td>
<td>5.4 Create WBS</td>
<td>5.5 Validate Scope</td>
</tr>
<tr>
<td>6. Project Time Management</td>
<td>6.1 Plan Schedule Management</td>
<td>6.2 Define Activities</td>
<td>6.3 Sequence Activities</td>
<td>6.4 Estimate Activity Resources</td>
<td>6.5 Estimate Resources</td>
</tr>
<tr>
<td>7. Project Cost Management</td>
<td>7.1 Plan Cost Management</td>
<td>7.2 Estimate Costs</td>
<td>7.3 Determine Budget</td>
<td>7.4 Control Costs</td>
<td></td>
</tr>
<tr>
<td>8. Project Quality Management</td>
<td>8.1 Plan Quality Management</td>
<td>8.2 Perform Quality Assurance</td>
<td>8.3 Control Quality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Project Communications Management</td>
<td>10.1 Plan Communications Management</td>
<td>10.2 Manage Communications</td>
<td>10.3 Control Communications</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Project Risk Management</td>
<td>11.1 Plan Risk Management</td>
<td>11.2 Identify Risks</td>
<td>11.3 Perform Qualitative Risk Analysis</td>
<td>11.4 Perform Quantitative Risk Analysis</td>
<td>11.5 Plan Risk Responses</td>
</tr>
<tr>
<td>12. Project Procurement Management</td>
<td>12.1 Plan Procurement Management</td>
<td>12.2 Conduct Procurements</td>
<td>12.3 Control Procurements</td>
<td>12.4 Close Procurements</td>
<td></td>
</tr>
<tr>
<td>13. Project Stakeholder Management</td>
<td>13.1 Identify Stakeholders</td>
<td>13.2 Plan Stakeholder Management</td>
<td>13.3 Manage Stakeholder Engagement</td>
<td>13.4 Control Stakeholder Engagement</td>
<td></td>
</tr>
</tbody>
</table>
Process Groups

- **Initiation**
  - Process performed to define a new project or phase of an existing project

- **Planning**
  - Establish the scope of the project, refine the objectives and define the course of action to attain the objectives

- **Executing**
  - Process performed to complete the work defined in the Project management plan

- **Monitoring and Controlling**
  - Process required to track, review and regulate the project and performance of the project along with any changes to the plan that are required

- **Closing**
  - The process to formally complete or close a project, phase or contract
A Project: Defined

An organized effort to achieve a predefined goal

- A temporary endeavour undertaken to create a unique product, service or result
- The project has a definite beginning and end
- Projects drive change in organizations
- The project charter formally authorizes the existence of a project and the business need
IRON TRIANGLE

Scope
Time
Cost
Project Success

- A statement of “doneness
  - Business Value
  - Measured & Quantifiable

- Success criteria
  - Higher revenue
  - Improved productivity
  - Increased sales

Wider definition of Value
# Project Life Cycle

<table>
<thead>
<tr>
<th></th>
<th>Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition</td>
<td>Temporary endeavor undertaking to create a unique product, service or result</td>
</tr>
<tr>
<td>Scope</td>
<td>The work performed to deliver a product, services, or result with the specified features and functions</td>
</tr>
<tr>
<td>Change</td>
<td>Project managers expect change and must implement change control process to keep change managed and controlled</td>
</tr>
<tr>
<td>Planning</td>
<td>Project managers progressively elaborate high-level information into detailed plans throughout the project life cycle</td>
</tr>
<tr>
<td>Management</td>
<td>Project managers manage the project team to meet the project objectives</td>
</tr>
<tr>
<td>Monitoring</td>
<td>Project managers monitor and control the work of producing the products, services, or results that the project was undertaking to produce</td>
</tr>
<tr>
<td>Success</td>
<td>Success is measured by product and project quality, timelines, budget, compliance and degree of customer satisfaction</td>
</tr>
</tbody>
</table>
Project Life Cycles

If most projects fit this model - why don't people follow it?

- Scope the Project
- Develop Detailed Plan
- Launch the Plan
- Monitor the Project Progress
- Close out the Project
The Big Question

- Who is the most important/critical on a project?
  - Business Sponsors
  - Project Manager
  - Team Members
Project Structure

- Functional
- Projectized
- Matrix
- Project Coordinator

Typically in a matrix organization
Project Manager’s Environment

- Executive Sponsor
- Steering Committee
- Project Manager
- Subject Matter Experts
- Third Parties
- Development Team
- Project Sponsor
Project Manager’s Responsibilities

**PLANNING THE PROJECT**
- deliver expected value by achievable end dates
- estimating resources
- assessing risks
- project management plan
- project schedule

**CONTROLLING THE PROJECT**
- team performance
- anticipated benefits are not compromised
- progress reporting
- problem resolution
- managing contractors
- team morale
- client relationship

**ACTIVATING THE PROJECT**
- team preparation
- team motivation
- client relationship

**ENDING THE PROJECT**
- client relationship
- team member evaluation
- celebration for team
- final reckoning
Characteristics of Project Manager

- Knowledge of Project Management
- Practical Application of Tasks
- Excellent Communication Skills
- Leader
- Team Builder
- Enterprise Perspective
- Supported by Management
PLANNING THE PROJECT
Planning

Why Plan?

What makes a good plan?

How do you plan?

When should I plan?

What is there to help me?
Reasons for Planning

- Achievable
- Help identify key milestones
- Aids in thought process
- Aids delegation
- Basis of costing
- Resource management

Includes:
- Scope
- Work Breakdown Structure
- Activity list/duration
- Budget
A Good Plan

- Covers all the processes that make up project planning
- Timescales clearly shown
- Resources clearly marked
- Defines deliverables
- Components include:
  - Quality Management Plan
  - Risk Management Plan
  - Vendor Management Plan
Project Charter Elements: ICD-10 Charter

- Project Purpose/Business Justification
- Project Objective
- Areas Impacted
  - Systems Impacted
  - Operational Impacts
  - Financial Impacts
- Project Approach
- Major Risks
- Project Success
So what is the best way to approach this?

- You decide to invite 4 friends around for a proper sit down chicken dinner
- You check with your partner and they agree (‘agreement to proceed’)
- However, you have to organize as your partner is busy

So what does the plan look like?
The Work Breakdown Structure
A Hierarchical Breakdown of Activities

PROJECT

STAGE

Produce Meal

Plan
Prepare
Cook
Serve
The Work Breakdown Structure
A Hierarchical Breakdown of Activities

PROJECT

STAGE

STEP

Produce Meal

Plan

Prepare

Cook

Serve

Cook Vegetables

Cook Chicken

Finalize Dessert
The Work Breakdown Structure
A Hierarchical Breakdown of Activities

PROJECT

STAGE

STEP

TASK

Produce Meal

Plan

Prepare

Cook

Serve

Cook Vegetables

Cook Chicken

Finalize Dessert

Stuff Chicken

Baste Chicken

Place in Oven

Monitor Chicken
Components of a Plan
Components of a Plan (cont’d)
Components of a Plan (cont’d)

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Effort</th>
</tr>
</thead>
<tbody>
<tr>
<td>Milestone - EDC004</td>
<td>0 days</td>
</tr>
<tr>
<td>Project Support</td>
<td>65 days</td>
</tr>
<tr>
<td>Build Project Register</td>
<td>21.5 days</td>
</tr>
<tr>
<td>Build questionnaire</td>
<td>0.7 days</td>
</tr>
<tr>
<td>Obtain answer to questionnaire from corr</td>
<td>1 day</td>
</tr>
<tr>
<td>Develop Register database</td>
<td>0.5 days</td>
</tr>
<tr>
<td>produce reports</td>
<td>1 day</td>
</tr>
<tr>
<td>Milestone - SUP001</td>
<td>0 days</td>
</tr>
<tr>
<td>Support Pilot Project - Y2K</td>
<td>16.2 days</td>
</tr>
<tr>
<td>Agree aims with project Manager</td>
<td>0.5 days</td>
</tr>
<tr>
<td>Tailor the Method for the Project</td>
<td>0.5 days</td>
</tr>
<tr>
<td>Develop local Programmes Office</td>
<td>1 day</td>
</tr>
<tr>
<td>Agree on tool usage</td>
<td>0.5 days</td>
</tr>
<tr>
<td>Build environment</td>
<td>2 days</td>
</tr>
<tr>
<td>Test environment</td>
<td>1 day</td>
</tr>
<tr>
<td>Support subsystems from Group</td>
<td>0.2 days</td>
</tr>
<tr>
<td>Activities to Group</td>
<td>0 days</td>
</tr>
<tr>
<td>Build environment</td>
<td>4.2 days</td>
</tr>
<tr>
<td>Agree aims with project Manager</td>
<td>0.5 days</td>
</tr>
<tr>
<td>Regenerate documentation to new stand</td>
<td>0.5 days</td>
</tr>
<tr>
<td>Build environment</td>
<td>2 days</td>
</tr>
</tbody>
</table>

Who will do it

- Ian Simpson
- Colin Woods

Effort

“person time”

When

“elapsed time”
Critical Path

- The sequence of activities that represents the longest path through a project which determine the shortest possible duration

- Any activity on the critical part is on the project schedule

- A method used to estimate the minimum project duration and determine the amount of schedule flexibility on the logical network paths within the schedule model
Critical Path

<table>
<thead>
<tr>
<th>Path</th>
<th>Activities</th>
<th>Path Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>A-D-H-J</td>
<td>2+5+7+4</td>
<td>18</td>
</tr>
<tr>
<td>C-G-I-J</td>
<td>4+7+3+4</td>
<td>18</td>
</tr>
<tr>
<td>B-F-J</td>
<td>3+15+4</td>
<td>22</td>
</tr>
<tr>
<td>B-E-H-J</td>
<td>4+6+7+4</td>
<td>21</td>
</tr>
</tbody>
</table>
Project Templates

- Improves Quality
- Speeds up the Process
- Learn from the Experience of Others
- Tried and Tested Approach
- Easy to Build New Approaches
Tips on Planning

- Use Microsoft Project or similar scheduling tool – Makes life easier!!
Project Management
The End Stage
Objectives

- To understand the Final Tasks that need to be completed on a Project, and the importance of each of those tasks
Project Closure

- The process of finalizing all activities for the project, phase or contract.
- The Project is archived, the planned work is completed and organization tem resources are release to pursue new endeavors

Outputs
- Lessons learned
- Final product, service or result transition
- Final Report
- Organizational process assets updates
Ending a Project - The Tasks

- Prepare completion report
- De-equip project
- Turn over results
- Finalize documentation
- Release project resources
Determine Impact on the Business

- Do the deliverables meet the business needs?
- Do the deliverables meet the user needs?
- Are the deliverables maintainable?
De-Equip Project

Logistical Support
- Facilities
  - Desks,
  - Chairs,
  - Whiteboards, etc
- Computers/Software
- Other Resources
  - Phones,
  - Printers,
  - Coffee machine,
  - Borrowed stuff, etc
Turn Over Results

- Scope
  - Close open issue list

- Deliverables
  - Models,
  - Designs,
  - Software, etc

- Intermediate products
  - Presentations,
  - Work papers, etc

- Final signatures
Finalize Documentation

Financials
- Final labor costs
- Final non-labor costs
- Payment of final invoices
Release Project Resources

- Complete team member performance evaluations
- Reassign team members to other projects
Summary

- Collect suggestions for improving or updating the policies and procedures of the organization
- Measure stakeholder satisfaction
- Don’t forget the party