

Project Management Tools & Techniques

*Designed Exclusively for the New
Hampshire Association of Student
Financial Aid Administrators*

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Session Agenda

- Welcome & Overview
- What Is A Project?
- The Politics of Project Management
- Key Phases
- Tools & Techniques
- Google Me
- Action Planning Worksheet



Laws of Project Management

1. No major project is ever installed on time, within budget or with the same staff that started it. Yours will not be the first.
2. Projects progress quickly until they become 90% complete, then they remain at 90% complete forever.
3. One advantage of fuzzy project objectives is that they let you avoid the embarrassment of estimating the corresponding costs.
4. When things are going well, something will go wrong.
 - When things just can't get any worse, they will.
 - When things appear to be going better, you have overlooked something.
5. If project content is allowed to change freely, the rate of change will exceed the rate of progress.
6. No system is ever completely debugged. Attempts to debug a system inevitably introduce new bugs that are even harder to find.
7. A carelessly planned project will take three times longer to complete than expected; a carefully planned project will take only twice as long.
8. Project teams detest progress reporting because it vividly manifests their lack of progress.



What is a Project?

- Non-routine
- Nonrecurring
- Performed in a Logical Sequence
- Performed Within a Specific Time Period



How is Managing Projects Different?

Project Manager	Functional Manager
<ul style="list-style-type: none">• Temporary	<ul style="list-style-type: none">• Permanent
<ul style="list-style-type: none">• Ever-Changing	<ul style="list-style-type: none">• Stable (e.g., SOPs)
<ul style="list-style-type: none">• Limited Authority	<ul style="list-style-type: none">• Full Authority
<ul style="list-style-type: none">• Multiple Disciplines	<ul style="list-style-type: none">• Single Discipline
<ul style="list-style-type: none">• Highly Uncertain Environment	<ul style="list-style-type: none">• Highly Predictable Environment
<ul style="list-style-type: none">• “Second” Boss	<ul style="list-style-type: none">• The Boss
<ul style="list-style-type: none">• Complex Work Mix	<ul style="list-style-type: none">• Relatively Simple Work Mix



Key Phases of a Project

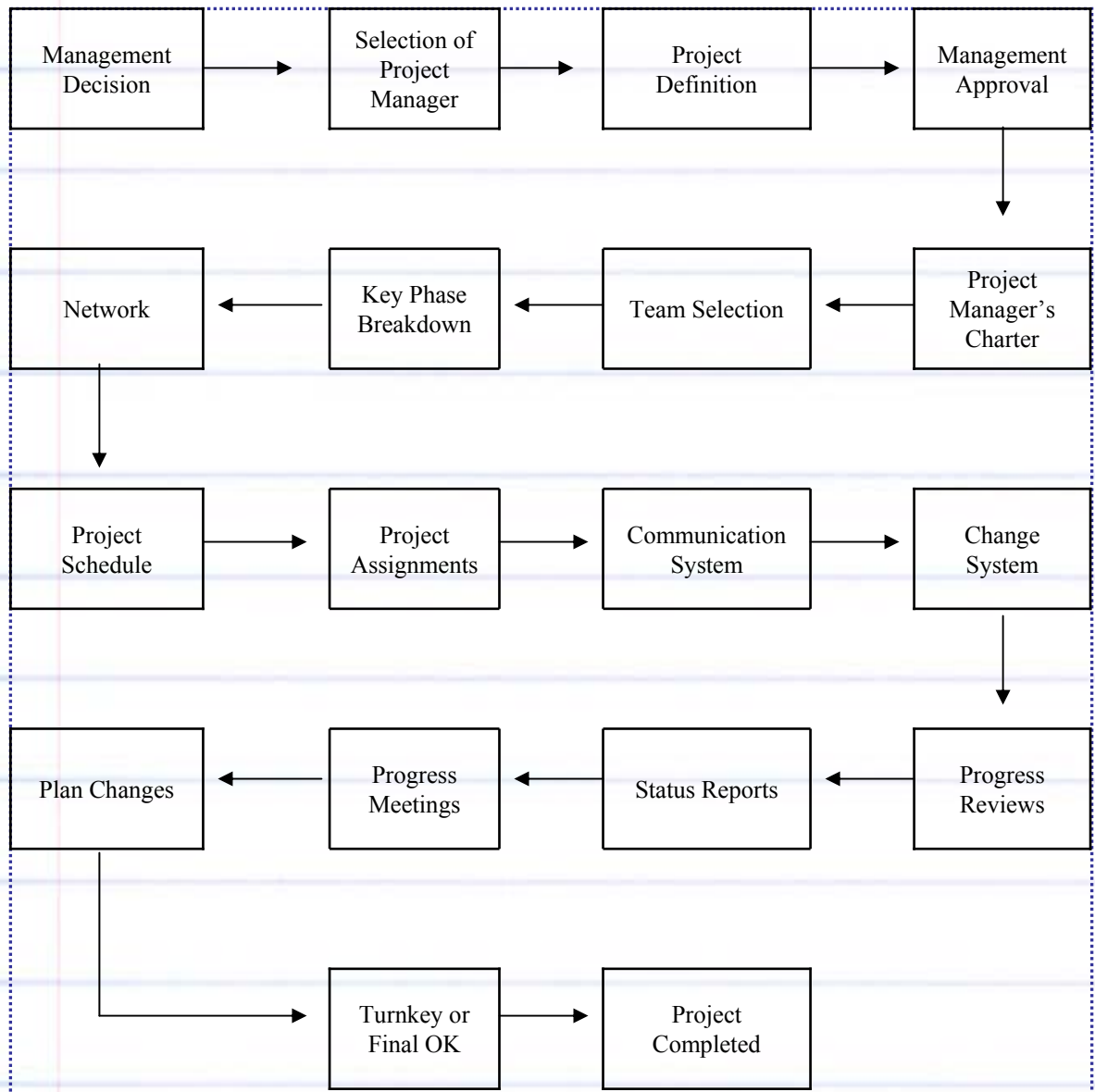
- Conceptualization
- Planning
- Implementation
- Completion



Team Development Stages

Orientation	Adjustment	Settlement	Production
<p>Getting acquainted</p> <ul style="list-style-type: none">• High excitement• High anxiety• Confusion about goals, structure & leadership• Inclusion	<p>Struggling to work with one another</p> <ul style="list-style-type: none">• Clash over tasks & responsibilities• Jockeying for position• Pessimism & doubt• Conflicts• Power & Control	<p>Learning to work with one another</p> <ul style="list-style-type: none">• Building internal value systems• Group identity• Optimism, hope & cooperation• Relative calm• Relationships	<p>Performing the work with one another</p> <ul style="list-style-type: none">• Interdependence• Mutual Trust• Ownership of product• Confidence• Enjoyment

Project Management A Systems Approach

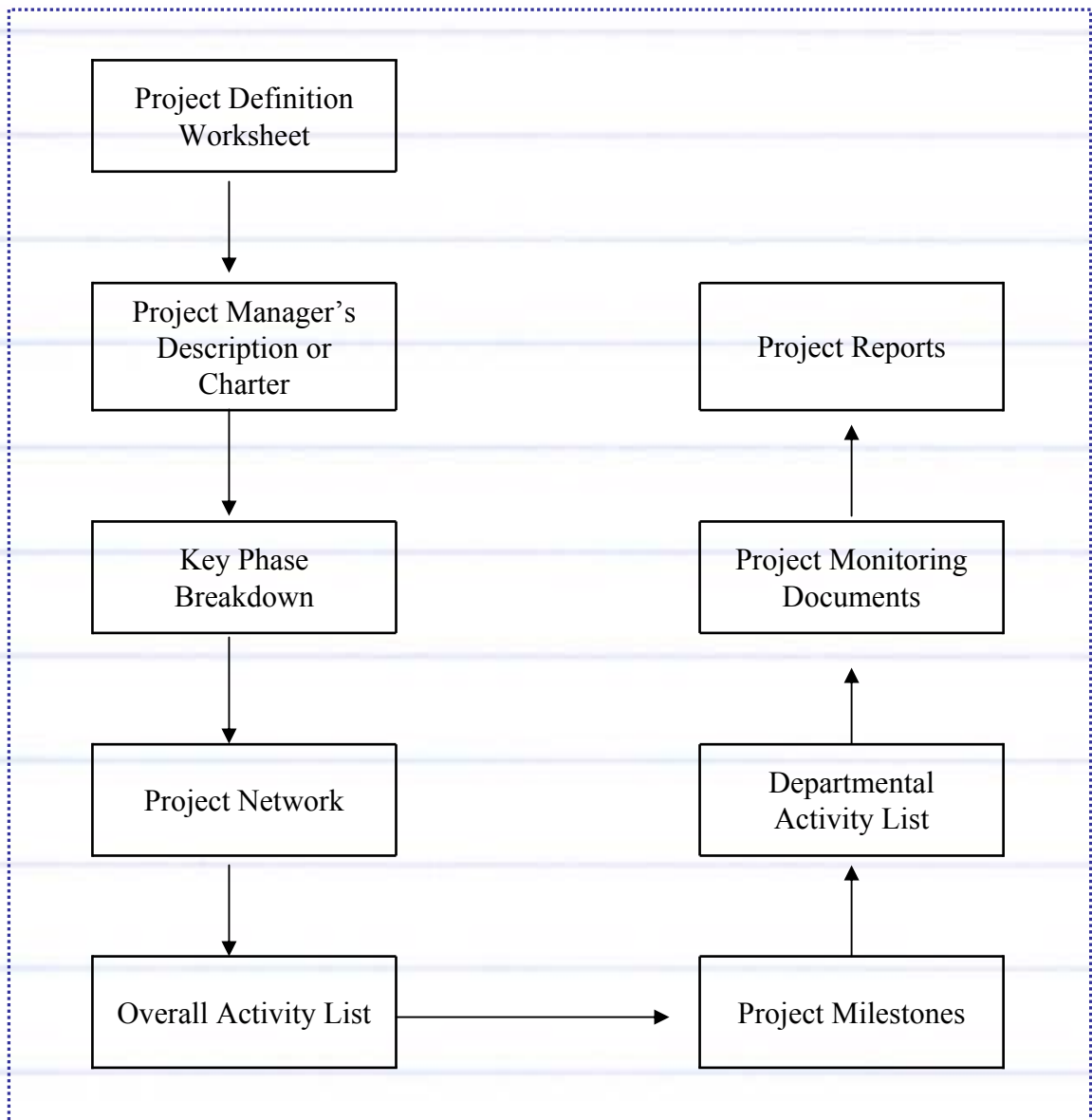




Nine Key Project Planning Steps

1. Problem Identification – Project Definition
2. Phase and Task Development – Work Breakdown Structure (WBS)
3. Detailed Task Descriptions – Activity List
4. Estimating Time and Resource Requirements – Activity List
5. The Project Plan – CPM Network
6. The Project Schedule – Bar Charts
7. Project Budget Development – Budget Worksheet
8. Plan and Schedule Review
9. Senior Management/Client Approval

Project Management Documents



Define Project Scope

Remember: Scope equals results that the Project is *committed* to provide!

Specify: **DELIVERABLES** to be produced, **functionality** to be provided, **features** to be delivered, **services** to be performed, etc.

IN SCOPE What the Project Will Include:	OUT OF SCOPE What the Project Will Not Include:



Project Request

Department Location	Expense Center	Date
Project Title	Requested By	
Project Description (Objective and Scope)		
Anticipated Benefits		
Is this in Capital Plan? _____ If so, Amount _____		
Desired Completion Date	Expense Center Manager's Approval	
Estimated Staff Weeks	Assigned To	Date Assigned
Other Comments		
Priority A B C	Manager's Signature	Project Number



Project Authorization

Project Title: _____

Objective(s) (Results):

General Description of Work to be Done:

Estimated Duration: _____
Start (Month/Year) Complete (Month/Year)

Expected Cost: _____

Key Milestones

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

Submitted by:

Approved by:

Name Date

Name Date



Initial Project Charter Checklist

Your initial Project Charter should include each of the following components. The degree of detail for each component will vary based on the size and complexity of your Project:

Project Initiation

- Does your Project name reflect expected business outcomes rather than the technology or vendor employed?
- Have you developed a Project Description?
- Have you identified your sponsor?
- Have you identified your client?
- Have you documented your major assumptions?
- Have you developed a Business Case for the Project including cost and benefit estimates?

Objective and Approach

- Have you identified your project's constraints?
- Is your Project Objective clearly stated in business terms, using BSMART techniques?
- Have you identified two or three possible approaches for meeting the objective?

Scope Definition

- Do you have a list of deliverables that are considered IN scope?
- Do you have a list of deliverables that are considered OUT of scope?

Risks and Responses

- Have you completed a Risk Profile?
- Have you identified risk response strategies for high-risk situations?

Project Organization

- Have you identified the key roles needed on your Project?
- Have you documented the responsibilities you expect from each role?
- Do you have a Project Organization Chart that identifies critical project reporting relationships?

Project Ground Rules

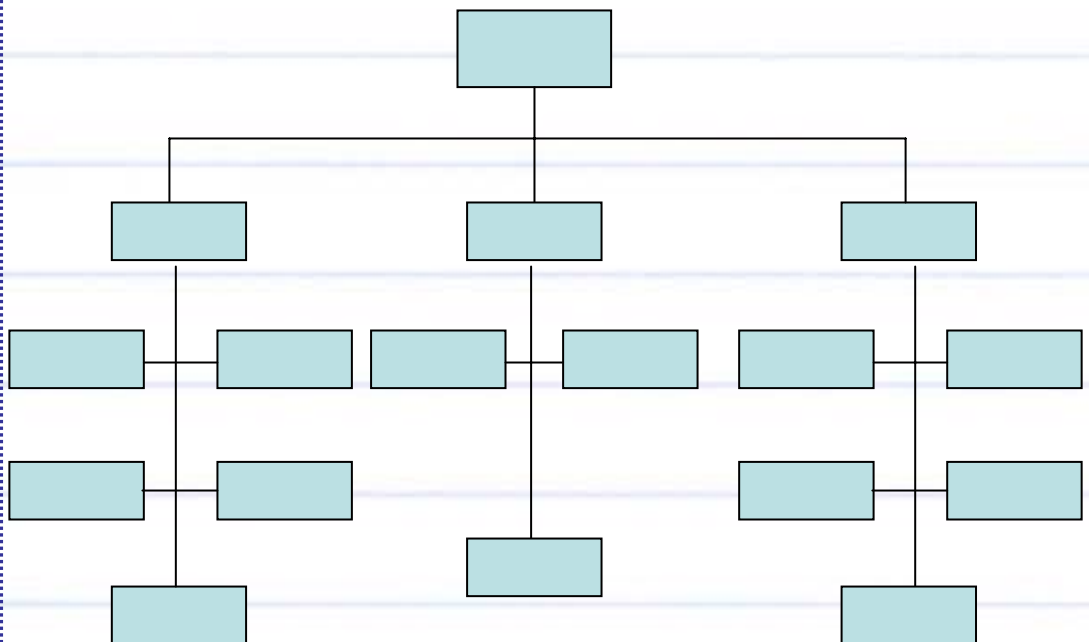
- Have you described the processes you intend to use for managing quality, issues, and change requests?
- Are environmental constraints and available hardware/software tools clearly documented?
- Have you identified the standards or conventions you expect followed on your Project?
- Have you discussed each of these items with your client to ensure understanding, obtain agreement, and know that you have the truth?



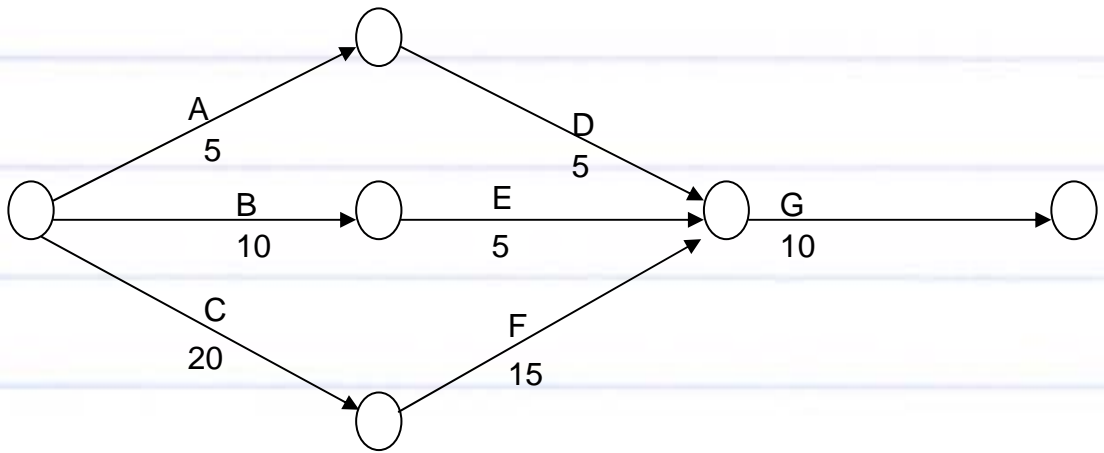
Work Breakdown Structure (WBS)

A Safety Net For Your Project

Planning all three parameters of a project starts with the work breakdown structure (WBS). This technique operates on the “divide and conquer” theory, by identifying the subunits or “work packages” of a project. By identifying all of the elements required to bring the project to a successful completion, the chances of overlooking or neglecting an essential step are reduced.



Barcharting Exercise



Activity

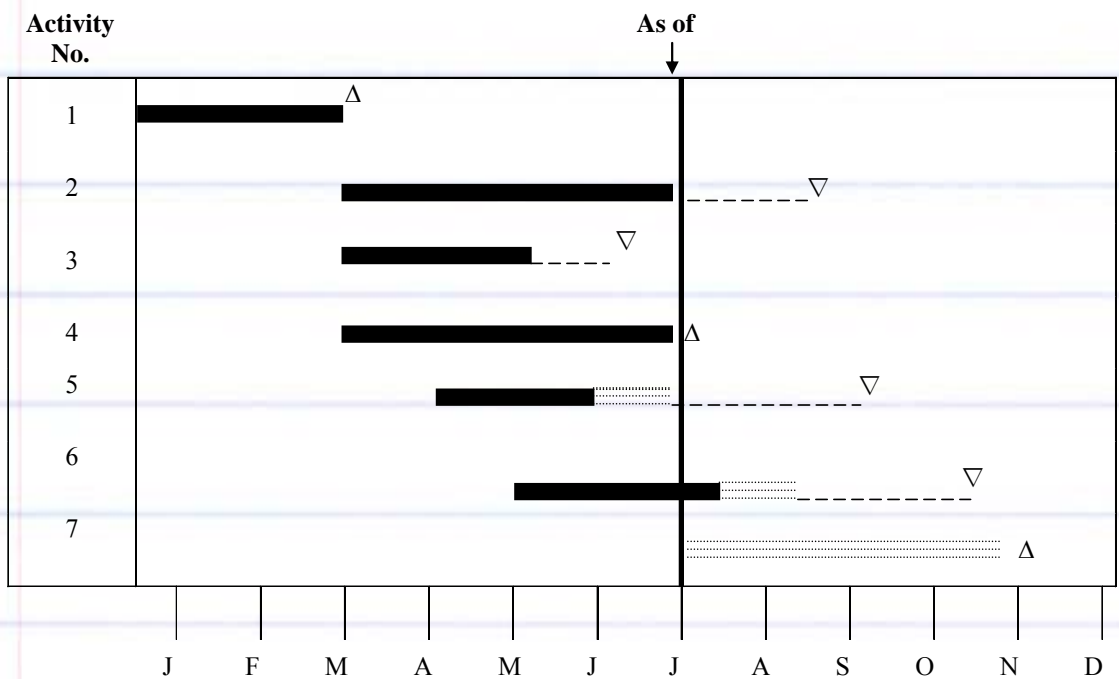
A	
B	
C	
D	
E	
F	
G	

Start

5 10 15 20 25 30 35 40 45



Barcharting Exercise





Task Analysis Form

This answers these questions:

- Who is going to do each task?
- How long will the task take?
- How much will the task cost?
- What are the deliverables of the task?

Task No.:	Task Name:
Predecessor Task(s):	_____
Specifications (Deliverables):	_____ _____
Resources – People / Dept:	1 _____ 2 _____ 3 _____ 4 _____
Equipment / Supplies:	_____ _____
Time Estimates:	Must Start _____ Must Finish _____
Milestones:	1 _____ 2 _____ 3 _____ 4 _____
Optimistic	Pessimistic _____ Most Likely _____
Cost Estimate:	\$ _____



Project Activity List

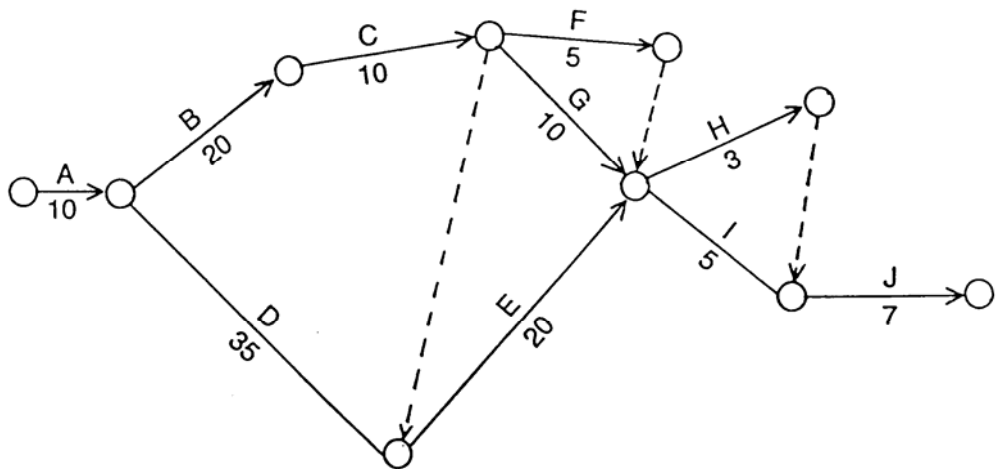
Project Title: _____

Phase Number: _____ Name: _____

Activity No.	Description	Resp. Unit	Estimated Time	Preceding Activities

Prepared By: _____ Date: _____ Approved By: _____ Date: _____

Critical Path Exercise





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Project: _____

Activity	Early Start	Early Finish	Late Start	Late Finish	Slack



Completed Sample Project Network Information

	Task	Dependent on Tasks	Estimated Duration
1.1	Go-Ahead	N/A	0 weeks
1.2	Manage Project	1.1	11 weeks
2.1	Select Computers	1.1	2 weeks
2.2	Select Software	1.1	3 weeks
2.3	Purchase Computers/Software	2.1, 2.2	1 week
3.1	Write Training Manual	2.1, 2.2	3 weeks
3.2	Write User Manual	3.1	2 weeks
5.1	Develop Training Program	2.1, 2.2	2 weeks
4.1	Plan Installation	2.3	1 week
4.2	Install Computers	4.1	2 weeks
4.3	Install Software	4.2	3 weeks
5.2	Train Users	3.1, 5.1, 4.3	1 week
4.4	Dry Run / System Test	5.2	1 week
1.3	Acceptance	4.4, 3.2	0 weeks

Try It!

		Sample Project											
		Week 08/23	Week 08/30	Week 09/06	Week 09/13	Week 09/20	Week 09/27	Week 10/04	Week 10/11	Week 10/18	Week 10/25	Week 11/01	Week 11/08
1.1	Go-Ahead	0											
1.2	Manage Project												
2.1	Select Computers												
2.2	Select Software												
2.3	Purchase Computers/Software												
3.1	Write Training Manual												
3.2	Write User Manual												
5.1	Develop Training Program												
4.1	Plan Installation												
4.2	Install Computers												
4.3	Install Software												
5.2	Train Users												
4.4	Dry Run / System Test												
1.3	Acceptance											0	



Cost Categories

- Labor
- Material
- Equipment
- Outside Fees

(Work closely with your accounting department)



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Project Communication Guidelines

1. Identify Your Communicating “Publics:”
 - Team Members
 - Superior(s)
 - Functional Peers
 - Customers
 - Suppliers
 - Other Project Managers

2. Design Your Communicating “System” . . . Assemble a “Communications Matrix

Who	Status Reports	Meetings	Presentations	Informal Dialogue
Superior(s)	Monthly Trend & Exception Reports	Monthly Quarterly	Key Milestone Dates	Accomplishments Anticipated Problems
Team Members	Weekly	Semi-monthly	Kick-off Key Milestones	Very Frequently
Functional Peers	Bi-weekly Monthly	Bi-monthly	Start-up Problems	At least bi-weekly
Customers	Monthly or as agreed	Start-up Key Dates Problems	Key Milestones Specification Changes	Follow-up to Formal Status Reports
Suppliers	As Required	As Required	Start-up Milestones	As Required



Call to Action

I will do what? By when?

Action	Date

Signed _____

Date _____



Contact Information

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