



BMCC Center for Continuing Education & Workforce Development

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Getting Things Done: Project Management for non-Project Managers

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Workshop Outline

Part I: Introduction, Framework and Tools

- Why “Project Management of non-Project Managers”?
- Project Life Cycle framework
- Project management tools and templates
- Putting it all together (hands-on work)

Part II: The Art of Project Management

- Industry studies on project success rates
- Execution is key for making ideas become reality
- Common reasons for project failures
- Some observations from the trenches
- Closing: how NOT to execute projects

Part I: Introduction, Framework and Tools



Why “Project Management for non-Project Managers?”



In today's complex business environment job functions tend to become narrowly specialized. Yet, virtually any job requires participation in various cross-functional or cross-divisional initiatives, most of which qualify to be referred to as 'Projects'. Project Management, therefore, is a universal skill, which can be beneficial to anyone, yet often least spoken of or taken for granted in a context of one's job description.

This workshop will provide an overview of the basic project management methodology and tools to help non-project managers grasp concepts of the project life-cycle from requirement to successful delivery. Particular attention will be given to the importance of execution as a key ingredient for transforming a 'vision' into the 'reality'. We'll also review the common project pitfalls based on the instructor's personal experience from close to a decade of running projects in the financial services industry.

Who can benefit from this workshop?

- *Anyone whose job requires to complete or participate in project assignments of various complexity (often not directly stated in one's job's description)*
- *Project sponsors and clients who ultimately benefit from the project deliverables (know how to effectively work with your project team, what to expect and what to ask for)*
- *Professional project managers navigating the always changing and uncertain landscape of large corporations (where every rule from the project textbooks seems to be broken)*

Project Life Cycle Framework: KEY PHASES



5 key phases for turning ideas...

1. Define

2. Plan

3. Build

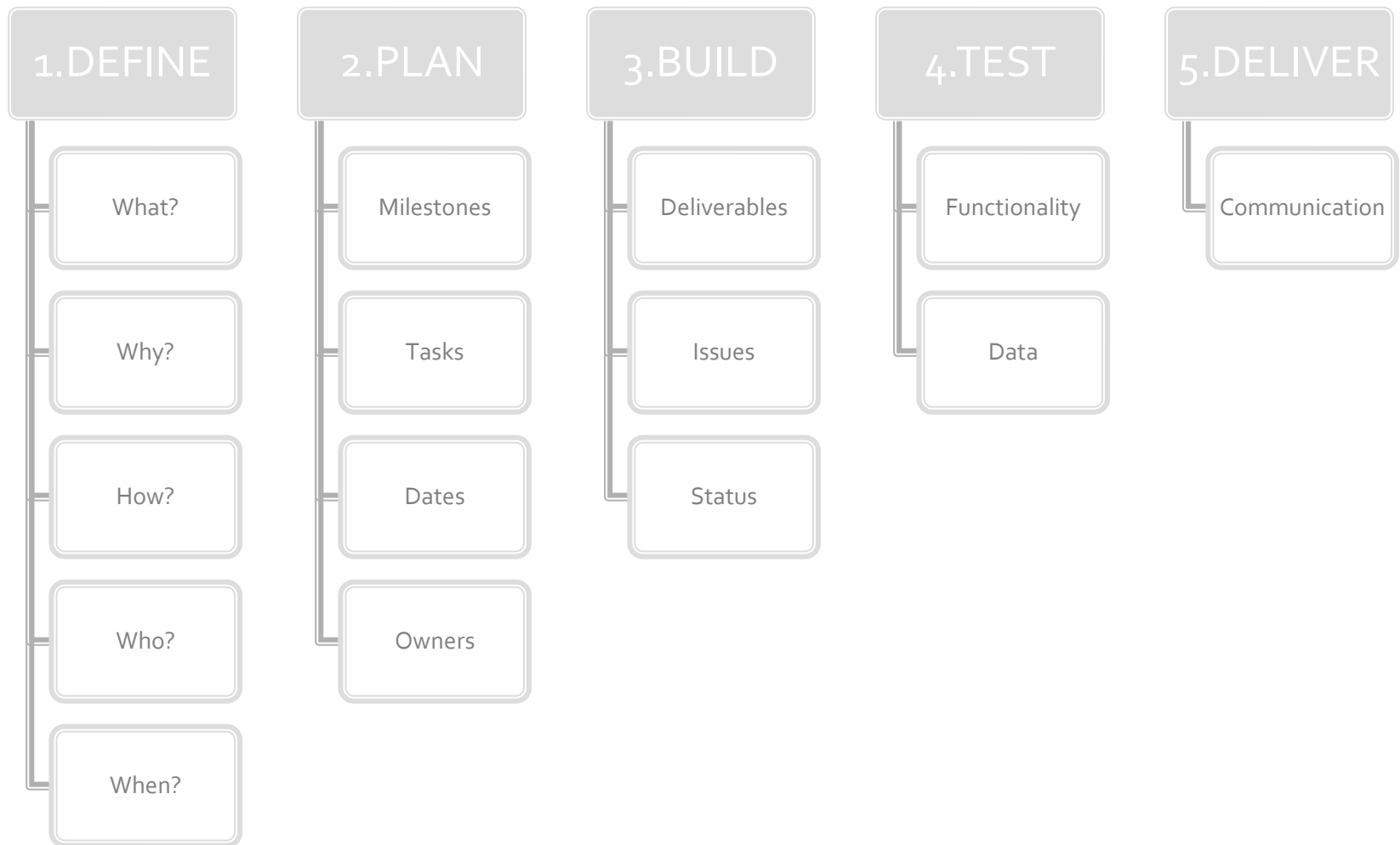
4. Test

5. Deliver

... into finished products



Project Life Cycle Framework: KEY ELEMENTS

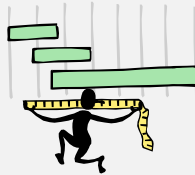


Project Life Cycle Framework: TOOLS & TEMPLATES

Tools



Requirements



Project Plan



Issues Log



Status Dashboard

Templates



Project Requirements:

Objectives, Specific Deliverables, Benefits, Key Stakeholders, Resource Estimate, Timeline, etc.

Project Plan:

Organize project plan around key deliverables, workstreams, project phases etc.

Issues Log:

All open issues and questions must be maintained in a separate document with specific issue owners.

Status Dashboard:

Provide key updates: next steps, critical issues, status of key milestones, etc. on a weekly basis

Sample of the Project Requirements Template

Project Definition Template	Tuesday, October 09, 2012
Enter Project Name here <i>Enter Project Manager name here...</i>	
What? <i>Project Objectives</i>	Enter here...
Why? <i>Project Benefits</i>	Enter here...
How? <i>What needs to be done to achieve project objectives?</i>	Enter here...
Who? <i>Key stakeholders and subject matter experts</i>	Enter here...
When? <i>Deadlines and due dates</i>	Enter here...

Sample of the Project Plan Template

Project Plan: Timeline, Milestones and Tasks

Tuesday, October 09, 2012

Enter Project Name here

Enter Project Manager name here...

Project Initiation Date:	1-Oct-12	Owner	Start	End	R A G	1-Oct	2-Oct	3-Oct	4-Oct	5-Oct	6-Oct	7-Oct	8-Oct	9-Oct	10-Oct	11-Oct	12-Oct	13-Oct	14-Oct	15-Oct	16-Oct	17-Oct	18-Oct	19-Oct	20-Oct	21-Oct	22-Oct	23-Oct	24-Oct	25-Oct	26-Oct	27-Oct	28-Oct	29-Oct	30-Oct	31-Oct	1-Nov	2-Nov	3-Nov	4-Nov	5-Nov	6-Nov	7-Nov	8-Nov	
WORKSTREAM 1																																													
Milestone 1		Name	1-Oct	30-Oct	C	▲																												▲											
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Milestone 2		Name	1-Oct	30-Oct	C	▲																													▲										
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Sample of the Issues Tracker

ISSUES LOG

Tuesday, October 09, 2012

Enter Project Name here

Enter Project Manager name here...

I	Project	Workstre	Ty	Pri	Issue	Issue Description	Resolution/Next Steps	Status	Owner
								C	
								C	
								C	
								R	
								R	
								R	
								R	
								G	
								G	
								G	
								A	
								A	
								A	
								?	

Sample of the Project Status Dashboard

Update Date: ##/##/##

Overall Status:

Project Phase: INITIATION

Project Benefits Areas:

Risk Control	Client Service	Efficiency
✓		✓

Key Stakeholders:

[illegible]

Upcoming Milestones

```

XXXXXXXXX    date
XXXXXXXXX    date
XXXXXXXXX    date
XXXXXXXXX    date

```

NAME OF THE COMPANY OR DIVISION

Project Name

Project Leads: xxx

Objectives:

[illegible]

Phases / Enhancements:

[illegible]

Completed Items:

[illegible]

Challenges / Issues:

[illegible]

Next Steps:

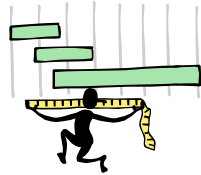
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Project Life Cycle Framework: Putting it All Together

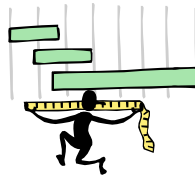
1. Define



2. Plan



3. Build



4. Test



5. Deliver



Project Life Cycle Framework: Putting it All Together

General Approach

1. Define Business Requirements

- a. What would you like to do (*objectives*)?
- b. Why (*benefits*)?
- c. How (*specific solution*)?
- d. Who (*stakeholders / subject matter experts*)?
- e. When (*due dates / deadlines*)?

2. Plan Key Milestones and Tasks

- a. Create a list of main deliverables
- b. Write down all that needs to happen (*brain dump*)
- c. Organize the list into logical groups (*workstreams / sections*)
- d. Assign owners, resources, dates
- e. Revise as needed and as much as needed

3. Build What You've Planned

- a. Maintain project plan
- b. Track issues
- c. Report status via project dashboard

4. Test what you've Built

- a. Testing is Key!
- b. Testing is Key!
- c. Testing is Key!

5. Deliver what you've built

- a. Communication is Key!
- b. Communication is Key!
- c. Communication is Key!

6. Celebrate!

- a. This hard work will be forgot way too soon!
- b. Take credit!
- c. Give credit!

Part II: The Art of Project Management



Making things happen is harder than it seems... Execution is key!

Industry Studies:

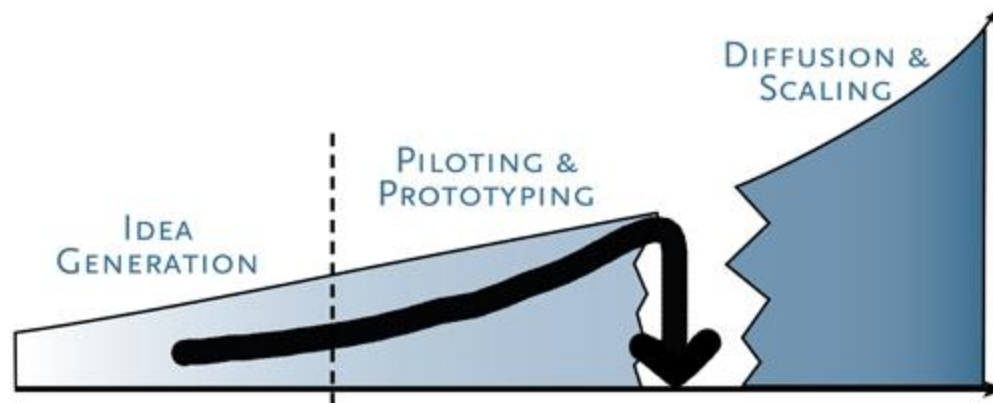
The average software development project exceeds its planned budget by 90% and its schedule by 120%

- 33% of all projects are over budget and late
- 53% of projects will cost 189% of their original estimates
- Only 16.2% of projects will be completed on-time and on-budget
- The average time overrun is 222% of the original estimate
- In large companies, only 9% of projects come in on-time and on-budget

Source: The Cost Xpert Group, Inc.

Execution is Key to Project Success

Ideas Are Not Enough - Time to Face the "Executioner"



"After 5 weeks of intensive incubation and skill training, each fellow will be given 5 additional weeks to 'run' with their idea. They will have all the tools, skills, marketing materials, and strategic plans they need to be effective. All that remains for them to do — is execute."

That's *all*? Just execute? Piece of cake, right?

Source: Stanford Graduate School of Business, Center for Social Innovation
<http://csi.gsb.stanford.edu/ideas-are-not-enough>

Some Observations from the Tranches...

- “If You Want Get Something Done Right Do It Yourself”
- Remain hands-on on all aspects of the project
- Understand all open issues and what needs to be done to resolve them
- Follow up on open issues and action items to put healthy pressure on key players
- Never assume anything if it’s relevant to the success of the project
- If things are unclear, assume the worst (at least worse than you think)
- Keep discipline and commit to the protocol and established standards
- Never compromise testing of the final results: QA (quality assurance) is key
- Be fair, demanding, but flexible
- **Use common sense**

Not All Executions Are Successful:

An example of how NOT to execute projects



<http://www.youtube.com/watch?v=79tl2H3QzTo>