REAL WORLD PROJECT MANAGEMENT
2-Day Project Management Seminar

TRAINER GUIDE
Timing Guide

Note: The timing noted below is a general reflection of the timing used by trainers. Individual trainers may want to vary their timing slightly to accommodate their own style and approach to the material.

DAY ONE — AM

Introduction ……………………………………………………………………WB pp 1 - 20

Part 1: Define …………………………………………………………… **WB pp 21 - 27**

Who is the client?
What are the objectives and deliverables?
Determining your constraints
Defining the scope of your project

Part 2: Plan ………………………………………………………………….. **WB pp. 29 - 46**

Creating a Work Breakdown Structure (WBS)
Estimating time
The task analysis form

DAY ONE — PM

Scheduling: Building a Gantt chart
Real-life scheduling: Critical Path Method (CPM)
Creating realistic budgets
Using a project resource/cost estimate worksheet
Managing risk
Putting together the project team
Getting client approval and sign-off

DAY TWO — AM

DAY TWO — PM

Welcome

1. Welcome and introduction. Please discuss your experience as a project manager.

2. Discuss the layout of the 2-day workshop. (see also table of contents and the course timing).

3. Be sure to tell participants that project managment is not just about the technical aspect of scheduling using GANTT and PERT charts, but a combination of communication skills, team building, management and the technical stuff. Many PMs believe that the technical stuff is the easiest aspect of PM.

4. Using WB 16, ask participants to write their main objective—the one thing they hope to get out of this seminar. (*The last thing you will ask them at the end of the second day is whether you met their objective or not.)*

5. Read the two versions of the definition of project management, and ask for observations or comments on these definitions. Ask participants to give you some examples of activities that are definitely projects, as well as some that are definitely not projects. Then identify a couple of examples that are more “gray” and ask participants whether or not they fit the definition. Spend about 5 min. on this — it’s important that they understand what a project is.

Additional trainer notes:

Trainer guide
WB 17

Introduction – Why project management?

1. Divide the class into groups of 4 to 5 particpants. Ask them to use the lines on p. 17 and the side of the page to make a list of all the tasks that you would have to undertake in project management in order to build a typical house. Tell them to be as specific as possible with their list. They have 5 minutes to complete this list. When they have finished review the list using OHs as a guideline. Debrief by asking participants if they left some tasks off their list or added some that did not need to be there. Talk about people's thoughts regarding the activity.

2. Ask participants to describe their present level of experience working in a project environment and being a project manager. You might use the analogy of "grade school, middle school and high school/college as a way of identifying levels of experience and familiarity with PM concepts. If you have any participants who identify themselves as high school/grade school, make them the leaders of the groups you form in #2.

3. Staying within their groups of 4 or 5. Their tasks are to complete the rest of the advantages and restrictions of PM, decide on a group name and determine a rotational system to allow everyone a chance at being the group spokesperson. Allow 10 minutes.

4. Debrief activity by having each group spokesperson share their ideas on the advantages and disadvantages.

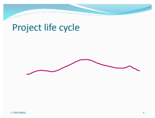
5. Expand a bit on the value of organizing work as projects in order to manage complexity, to orchestrate a wide variety of related activities and to keep track of costs, schedule and specificications.

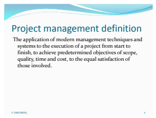
Additional trainer notes:

HRDQ

Trainer guide

WB 18 - 19





Introduction – What makes project management so unique?

1. Define a project: “*A group of tasks performed in a definable time period in order to meet a specific set of objectives.”* (Levine, 1986). It is often complex and *not* intuitive...even to experienced project managers.

2. Then using WB 19, continue discussion on the unique aspects of project management. Do not get into deep discussions on every point but do emphasize a few.

3. Next, tell participants that a project has a life cycle. It varies slightly depending on who you talk to and the industry you are in but should encompass the following elements: definition, planning, implementation, monitoring and completion. Please point out the different axes on the diagram and describe that each phase has a unique requirement for time and resource allocation.

4. Go through the differences between functional managers and project managers, pointing out the key differences.

Additional trainer notes:

Trainer guide
WB 20
Introduction – Assessing your project management skills

1. Tell participants to complete the assessment on this page. Allow 5 minutes.

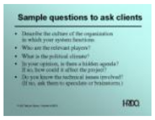
2. Debrief by reassuring the participants. Project management is concerned with large amounts of details and can seem overwhelming, but no one is expected to be an expert, even after many years of experience.

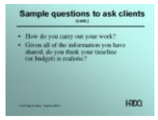
3. Randomly choose several tasks on the assessment and ask for a show of hands on how many participants feel proficient in that area. Then turn it around and ask the opposite, "How many of you feel that your skills in this area could use some help?" Remind participants to use this page as a validation and/or as a reminder of the skills they need to work on.

4. Encourage participants to seek answers to their questions, not just from you but also from other subject matter experts.

Additional trainer notes:

Trainer guide
WB 21 –22





Client Expectations
Part 1 – Define - Who is the client?

1. Next, begin a discussion about who the client is for the project, using p. 21 to talk about the variety of clients who may influence the project in addition to the "nominal" client.

2. Sometimes who your client is may not be readily apparent, because so many entitities tend to be involved either directly or as "political" influences. Even if your project is for a single external entity who pays you when the project if over, you may also have multiple internal entities who are secondary clients or stakeholders in the project. (i.e., your finance and/or facilities departments, senior management, etc.)

3. If the project is an internal one, the client relationship can get really murky. A PM may have a whole set of individuals or entities to whom she is answerable. It's absolutely critical to figure out the "pecking order" of these entities, and to know with certainty who is acting as the primary "client." If you don't know when you take on the position of PM, be sure to find out as soon as possible. Political influences can be significant in internal projects.

4. If you have multiple primary clients (either external or internal), ask for clarification to determine who is responsible for what (and to whom you are answerable, for what). Failure to get this clarification can prove to be very uncomfortable to the PM and costly for the project. Provide some examples. The notion of stakeholder can be a little more subtle. Use a well-known project like the Alaska pipeline as an example: significant stakeholders (but not clients) were citizens of Alaska, environmental groups, the oil industry at large, the oil shipment industry, etc. Point out that stakeholders can have significant (and even enormous) influence on the design and implementation of a project

NOTE TO TRAINERS: we are not talking about the internal/external CUSTOMER SERVICE relationship here, although this concept does have some relevance in project managment.

5. Exercise: Using the "project teams" you formed earlier, tell each team about the following case study:

   Lease refresh of desktop computers and laptops case study:
   Limited Inc. leases all of their computer assets. Most computers are on a 2- to 3 - year lease. At the end of the lease period, the computers must be replaced by a new one's. Every quarter a number of machines must come out of the lease. However, no one at Limited Inc. knows who has what computer and how long the lease is on each computer.

In addition, there is no set procedure to procure, configure and replace data from the old computer to the new one. Also, there are no schedules of when to deploy the new computers to employees. There are some asset management tools at Limited Inc., but not enough. One of the constraints on this project is that it has to be completed within a 7 week time frame.

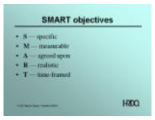
If they are not directly involved in this case study in real life, have them think of a project and even jot it down in the workbook. Have them think of, and keep this project in mind, as they are going through the skills in the course, even though they will continue with the lease refresh case study with their team.

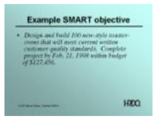
Tell participants that they will be using their new skills in project management to develop a workable plan that will create a system to refresh computer leases. Then tell the groups to identify all possible primary as well as secondary clients, writing these down in the workbook. Be sure to have them include both external and internal entities who have influence on the project. Allow about fifteen minutes for this activity.

6. Debrief the exercise by asking each group to share its ideas about who the primary and secondary clients and stakeholders are.

Additional trainer notes:

Trainer guide
WB 23 – 24





Part 1 – Define - What are the objectives and deliverables?

1. Remind participants that all of the clients that can be identified will have expectations with regard to the project. Some of these expectations are fundamental and will be relatively universal. HOWEVER, it is also highly possible that other expectations—particularly those having to do with the conduct of the project and the nature of the deliverables <u>may vary considerably.</u> A KEY PART OF DEFINING THE PROJECT IS GETTING AS MANY OF THESE EXPECTATIONS AS POSSIBLE OUT IN THE OPEN. Where there are obvious conflicts, the PM will need to seek clarification from the client and possibly negotiate compromise. There may also be hidden agendas—this is why it is important for the PM to learn about and be sensitive to the political climate within the client organization (which may be his/her own organization).

2. Go over the steps to create a partnership with your client to lay the groundwork for solid communication on objectives and deliverables.

3. How does a PM go about determining what client interests and needs will shape and affect the project? Ideally, as much as possible should be revealed during the DEFINE stage of the project to avoid surprises that cause problems during planning or implementation. As noted, there may be substantial differences in these interests and needs.

4. Not only that, clients may *not* know exactly what they want the project to accomplish, and it is your job to help them pinpoint this—skip this step at your peril! In addition, many clients may not be familiar with the project approach, so you may need to "educate" your client about the stages and characteristics of a project, and what your role as PM is.

5. Experienced PM's hold relatively extensive discussions and interviews with the client(s) to develop a good understanding of what is expected and needed. Using the list found on page 23, discuss the kinds of questions necessary to help identify client needs.

6. Spend a few minutes clarifying the difference between objectives and deliverables.
   A project must not only deliver the product the project was formed to create, according to the buyer's/sponsor's specifications and description, but also must meet the predefined project objectives. Project objectives, usually in terms of time, cost and quality, must be quantifiable and measurable.

Make sure that participants do not confuse these two concepts. Briefly discuss the importance of developing clearly stated, *thorough* objectives for each project. Many project delays can be attributed to last-minute additions and failure to include all essential work at the beginning of the project. A good objective must include the following SMART elements, **S**pecific, **M**easurable, **A**greed upon, **R**ealistic and **T**ime-framed. *Ex: Design and build 100 new-style toaster-ovens meeting current written customer quality standards. Complete project by Feb. 21, 2005 and within budget of $127, 456.* NOTE: In the OH, the deliverables are actually embedded in the stated objective. Point out that this may not always be the case.

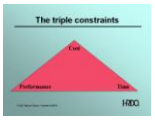
7. Exercise: Tell participants to return to their groups. Their task is to develop three objectives and deliverables for their project. Stress that these must be complete, yet clearly stated. After 15 minutes the group leader will negotiate these objectives/deliverables with you. You may accept, reject or negotiate for a more realistic deliverable. This exercise will help show participants that it's best to do this work at the beginning...instead of being surprised during the implementation phase.

8. As a final check, it is always a good idea to review the objectives and deliverables that you and the client have identified to distinguish between "requirements" and "nice to haves." As you initiate the planning stage of project management and begin to translate deliverables into dollars and days, you may find that it will be necessary to scale back. If you clearly understand what deliverables are absolutely essential, then you may be able to renegotiate to a realistic package of deliverables without losing credibility or causing angst with the client.

9. Exercise: As a short exercise, have the project teams review the list of objectives and deliverables they just developed in the previous exercise. Are any of the items really "nice to haves" instead of "requirements?"

Additional Trainer Notes:

Trainer guide
WB 25-26



Part 1 – Define - Determine your constraints

1. Begin a discussion on the triple constraints (time, cost and performance). Tell participants that *every* project can be hobbled by one or all of these constraints. They are the conditions (and sometimes the barriers and obstacles) imposed on our project. Cite examples of what some of these can be from your experience as a PM.

2. It may be too obvious, but remind participants that the way to determine constraints is to ask questions...lots of them. Point out some of the questions on the workbook page 26. Raising these questions helps prevent problems later.

3. This is a good place to talk about an important communications skill...listening. Determining your constraints is very important but getting consensus on these constraints is crucial. And the only way to do that is to be a good listener and negotiator.

4. Briefly discuss some basic listening and speaking rules. Listening is not an easy thing to do. It requires patience and self-discipline. But, it can be enormously valuable as the first step of successful negotiating. It gives you a chance to engage others in a cooperative task and it makes them more willing to listen to you.

5. Exercise: P. 26: Tell participants to get into their groups again so that they may determine constraints of their project, including the most important constraint. Ask them to write down for each constraint the nature of the constraint (e.g., time constraint is that the project must be finished in 7 weeks), a possible problem that could come up (e.g., a critical piece of equipment will not be available until two weeks later than originally estimated), the likely impact of that problem on the project, and how the project manager might mitigate the impact of the problem on the project. Allow 20 minutes for this activity. Remind them to get consensus on these constraints, and to determine which constraint (time, cost or performance) is going to be the most critical for their project.

6. Talk to pariticipants about backtiming on projects that have immovable deadlines. This means that they must begin timing tasks from the deadline and move backwards through the process to make sure that plenty of time is given at the end for completion of the project.

7. Next, ask each group leader to share their constraints while you write them on a blank OH. After that, ask for a show of hands on which constraint will be driving this project. (*probably time.)* Ask if anyone listed space planning. If so…great. This is critical at Limited Inc. because of lack of space to receive and configure large numbers of computers.

8. Debrief exercise by stressing the importance of separating the bells and whistles from the core contraints. Usually at the beginning of a project, both customer and project team get into pipe dreams that simply are unrealistic with the given constraints.

9. Defining the scope of the project: Cover the material included in the workbook, pointing out that typically, a formal project plan will have a section that covers the scope of the project, listing specific deliverables, time frame and budget. In some cases, it is appropriate to list what the project will <u>not</u> do as part of the scope.

Additional trainer notes: