

Introductory Training in the Principles and Tools used in Project Management.

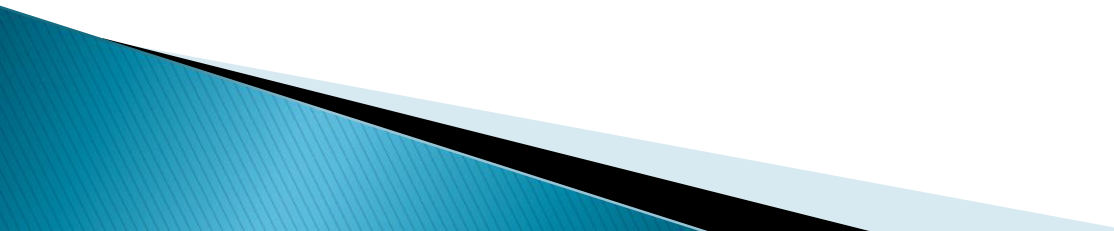


Who Are We?

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Agenda

- ▶ Definition of Project
 - ▶ What is Project Management?
 - ▶ Project Management Knowledge Areas
 - ▶ Recap
 - ▶ Project Management Tools
 - ▶ Questions & Feedback
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CRITICAL THINKING:

What do you consider to be a project?



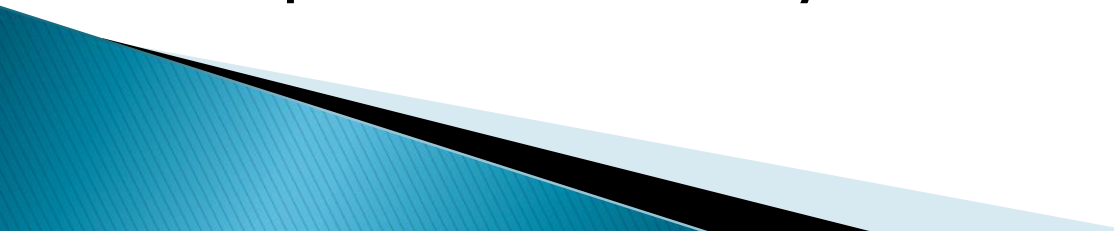
What is a project ?

A project is temporary it has a specific beginning and end with a defined scope and resources to complete the activity.

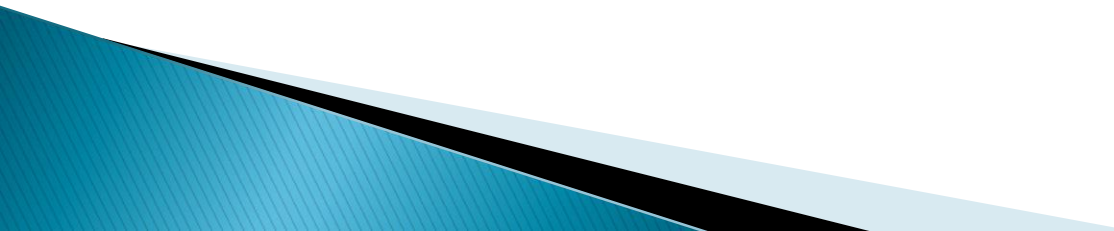


What drives the need for projects ?

To satisfy a need or requirement i.e.

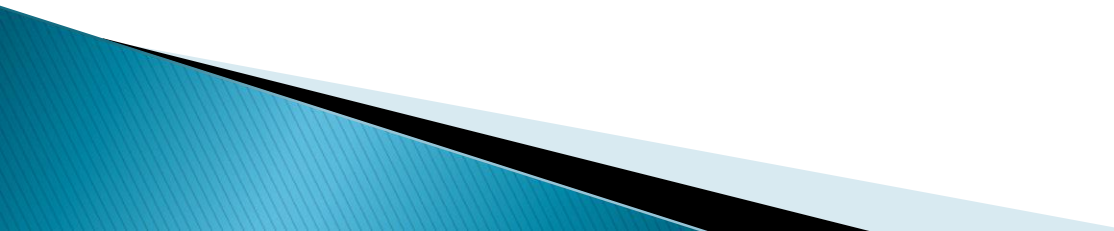
- ▶ Customer Request
 - ▶ Organizational (Profit/Non-Profit) need
 - ▶ Market demand
 - ▶ Regulatory requirement
 - ▶ Technological advancement
 - ▶ Improve Efficiency
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PROJECTS ARE CREATED TO:

- ▶ Meet regulatory, legal or social requirements;
 - ▶ Satisfy stakeholder request or needs;
 - ▶ Create, improve, or fix products, processes, or services
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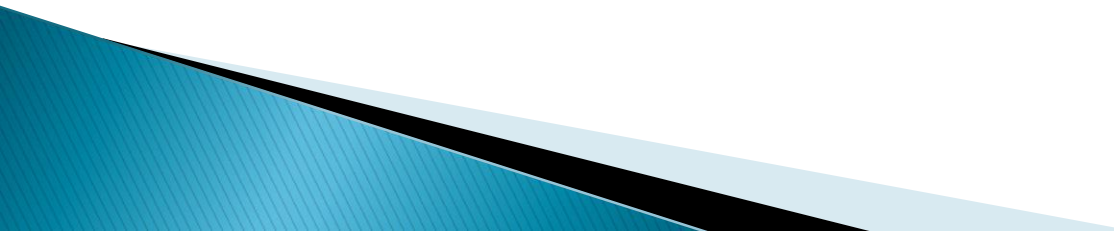
Projects are everywhere

Consider the following questions:

- ▶ What projects are you currently involved in ?
 - ▶ How did these projects begin ?
 - ▶ Can you identify any activities that can be classified as projects ?
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Project Examples

A project can create:

- ▶ A product that can be either a component of another item, an enhancement of item or an final item in itself.
 - ▶ A service or a capability to perform a process (e.g. a business function that supports production or distribution)
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Project Management Knowledge Areas



Project Management Institute.
Southern Caribbean



Initiating



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graph TD; A[Initiating] --> B[Planning]; B --> C[Execution]; C --> D[Monitoring]; D --> E[Close off];
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Planning

Execution

Monitoring

Close off

- Identify resources and stakeholders
- Define scope
- Develop Work Breakdown Structure
- Review workshop guidelines
- Plan schedule for project completion and feedback timeline
- Define Risk
- Determine Cost

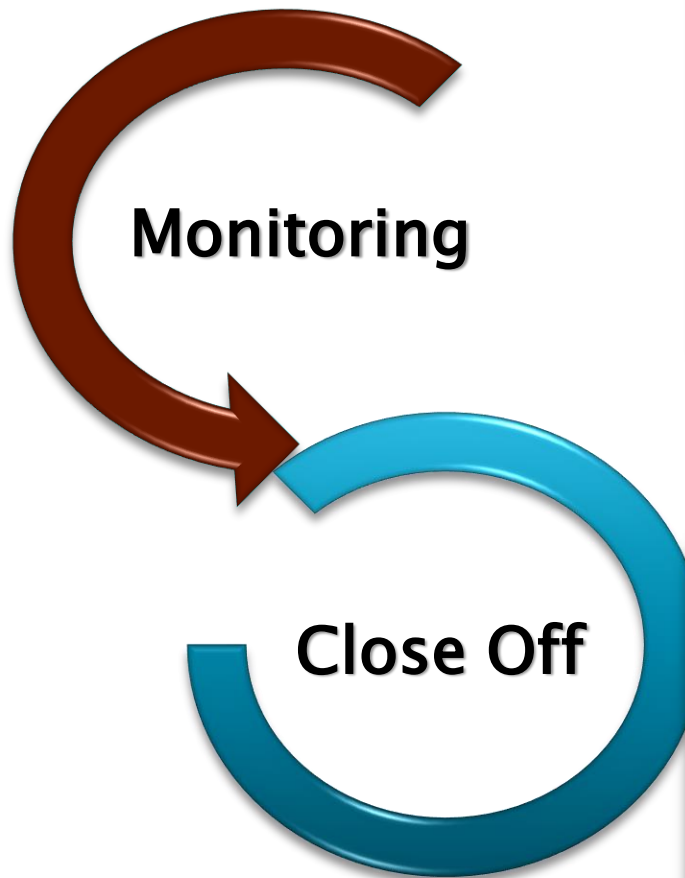
Initiating

- Discuss details
- Distribute question sheet
- Set Boundaries

Planning

Execution

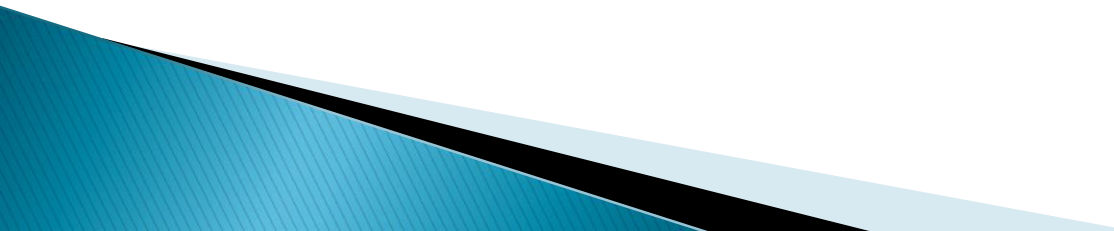
- Do the activities on project schedule
- Distribute questionnaire/surveys as needed
- Procure materials/resources



- Review work at pre-determined intervals and provide feedback.
- Make relevant changes. Review to ensure compliance
- Amended work is submitted for further review and feedback.

- Complete and handover Project
- Document Lessons learnt
- Final evaluation and payment to service provider.
- Contract Close

Project Administration

- ▶ Project Administration consists of project planning, monitoring, controlling and reporting.
 - ▶ Project Administration is critical to ensure all projects are planned and executed in a disciplined manner as well as delivered on time, within budget and achieve the targeted quality goals.
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Project Manager

The project manager is the person assigned by the organization to lead the project team and has the responsibility of conducting the project and meeting project objectives via project management principles.

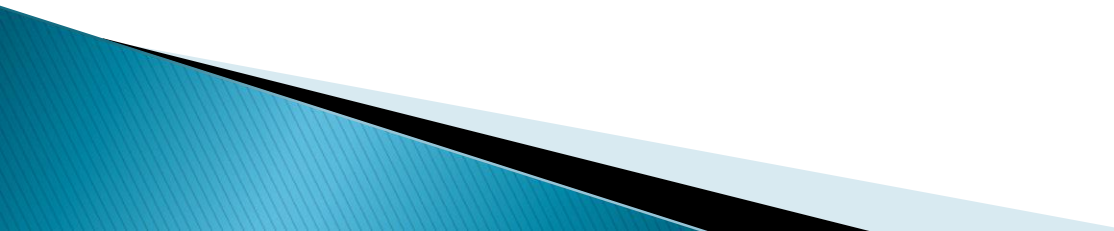
The project manager plays a critical role in the leadership of a team in order to achieve the project's objectives.



Project Team

The project team is a group of people responsible for executing the tasks and producing deliverables outlined in the project plan and schedule as directed by the project manager .

The team is comprised of many different roles i.e. project manager , subject matter experts, business analysts and various stakeholders.



Project Team Responsibilities

- ▶ To understand the project's purpose and objectives.
- ▶ To ensure balance of project scope vs non scope items.
- ▶ To work within timelines and budget constraints.
- ▶ To report progress against plans.
- ▶ To deliver products to predetermined specifications.
- ▶ To review project deliverables .
- ▶ To identify issues .
- ▶ To identify potential risks associated with the project.
- ▶ To contribute to the projects' deliverables.
- ▶ To work and collaborate as a team.



Level of Pain

Good
Planning

Poor
Planning

Time



What is a risk ?

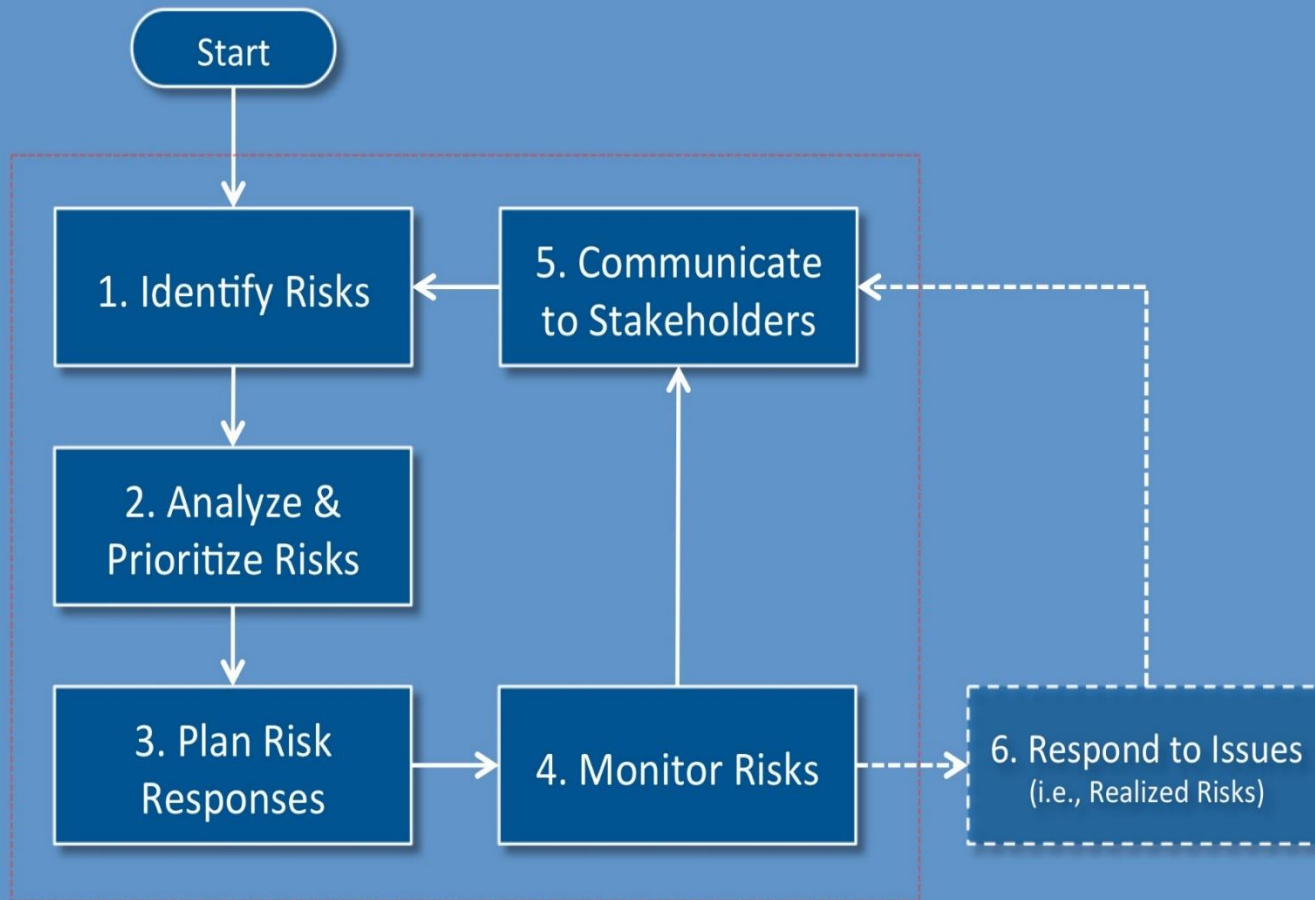
- **A Risk is :**

“An **uncertain** event, activity, or situation that can have a **positive** or a **negative** effect on any objective” -ARM

- **A Project Risk is :**

“an uncertain event or condition that, if it occurs, has a positive or negative effect on at least one project objective.” (PMBOK 4th)





THE RISK MANAGEMENT PROCESS

Successful Risk Management is a Continuously Iterative Process

Risk Assessment

1 Context

Understand organizational objectives and the external and internal environment

2 Identification

Find, recognize, and describe risks

Write a "risk statement" that includes sources, events, causes and consequences

3 Analysis

Comprehend the nature of risk and determine the level of a risk

Determine the risk's potential impact and likelihood

4 Evaluation

Compare the results of risk analysis with risk criteria to determine whether the risk is acceptable.

Prioritize risks.

5 Response

Modify the risk by mitigating, avoiding, transferring, or accepting the risk.

6 Monitoring & Reporting

Continually check the status of a risk to identify change from the performance level required or expected.

7 Communication & Consultation

Inform and engage in dialogue with stakeholders regarding the current state of risks and their management.

Project Success

Requirements or
Specifications
satisfied/exceeded

Completed within
allocated time
frame

Completed within
allocated budget

Implemented &
accepted by the
customer



Project Failure

Scope Creep

Poor Attention to Risks

Unrealistic Project & Lack of Planning And Scheduling



Poor Understanding of what is Required

Poor Communication and Poor Change Management

Lack Of Adequate Resources

Some PM tools that can be used:

- ▶ **Project Charter and Brief**

This is the first document prepared for description and approval of the project

- ▶ **Project Budget and Cost tracking Tools**

These tools are used in building a project budget and managing the cost.

- ▶ **Project Close-Out Report/lessons learnt log**

This Document is used especially for more complexed project where lessons learnt and project is closed off.

Other Main Tools Include:


- ▶ **Project Plan**

- ▶ **Communication Plan**

- ▶ **Milestone Plan**

- ▶ **Status Report**

Recap

1. What is a project.
 2. What is project management.
 3. What are the project management knowledge areas.
 4. What are the five process groups in project management.
 5. Project Administration.
 6. Project manager's role.
 7. Project team responsibilities.
 8. What is a Project Risk, Process and Basic Assessment of Project Risks.
 9. Results of poor planning in projects vs proper planning.
 10. Some key Project Tools/Templates.
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Project Management Tools – To review in Part 2 of session.

Project Process Group	Project Management Tool	PM Document Number	Document Description and Purpose
Initiation	(High Level) Project Charter Template	PMT001	The (High Level) Project Charter or Project Brief commences the identification of the Project and deliverables. It starts to describe how the NGO will work with the Service Provider to complete the Project on time and successfully.
	Project Charter Template	PMT002	The Project Charter describes the Project and how it will operate. It is the document that is approved by the governance of the NGO to officially commence the Project and allocate resources.
	Project Estimation Template (Service)	PMT003	This tool can be used to build the project budget for approval with the budget to be inserted in the project brief or charter
	Project Estimation Template (PM Training)	PMT004	This tool can be used to build the project budget for approval with the budget to be inserted in the project brief or charter
	Project Estimation Template (Construction/Tangible Projects)	PMT005	This tool can be used to build the project budget for approval with the budget to be inserted in the project brief or charter
	NGO Contractor Evaluation - (PM Services and Intangible Projects)	PMT006	This tool is used to assist in procurement of a qualified Project Manager

Project Process (▼)	Project Management Tool (▼)	PM Document Number (▼)	Document Description and Purpose (▼)
Planning	NGO Scope Statement Template - Procurement	PMT007	For Larger Projects: This tool is a more detailed guide to be used in building the Scope of Work for the project. It should be used for larger or more complex projects.
	NGO Scope of Work Template	PMT008	For Smaller Projects: This tool is a less detailed guide to be used in building the Scope of Work for the project. It can be used for less complex or smaller projects.
	Expression of Interest (EOI) - Template 1	PMT009	This document is used when the NGO has an idea of the of scope or project vision (NO detail SOW as yet) and wishes to understand what Firms or Service Providers are available to assist and what type of experience is available. Advertising can also advise of potentially interested candidates or contractor. It can be advertised publicly (newspapers, NGO website etc.) or within a specific special group.
	Expression of Interest Template 2	PMT010	This document is used when the NGO has an idea of the of scope or project vision (NO detail SOW as yet) and wishes to understand what Firms or Service Providers are available to assist and what type of experience is available. Advertising can also advise of potentially interested candidates or contractor. It can be advertised publicly (newspapers, NGO website etc.) or within a specific special group.
	NGO Contractor Evaluation - Service Project	PMT011	This document can be used for evaluation (Procurement Process) of selected contractors for a service type project.
	NGO Contractor Evaluation - Construction/Tangible Project	PMT012	This document can be used for evaluation (Procurement Process) of selected contractors for a construction/tangible type project.
	NGO PM Services - Advertisement Template	PMT013	This document can be used when the NGO wishes to advertise for PM Services or Training
	NGO Professional Services - Advertisement Template	PMT014	This document is used when the NGO wishes to advertise for other professional services as highlighted in the Hub.
	NGO procedure for Competitive Bidding for a Works Tender	PMT015	This document can be used for medium to large scale projects, where a tender committee is available and describes the procedure to be followed when a Service Provider or contractor is bidding for a project. Must be approved by the tender committee.
	NGO Form of Tender (Temporary Contract)	PMT016	This document can be used for medium to large scale projects where a tender committee is available and describes the procedure and expectations by the NGO when the tender can be used as a temporary contract. Must be approved by the tender committee.
	NGO Contract for Basic Training in Contract Management and Project Management	PMT017	This is a general contract template that can be used when preparing a contract for PM training or other PM services for NGO or project to be executed by selected service provider/contractor

Project Management Tools

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Execution & Monitoring and Control	NGO Project Register - Control Sheet Template	PMT018	This document can be used where multiple projects are being managed at the same time by the NGO and prioritized via project urgency.
	NGO Project Cost Tracking Sheets	PMT019	This document is used in the execution and monitoring stage for tracking cash flow of the project as it progresses. Tracking project costs is a very important part of project management.
Close-Out	Lessons Learnt Log Template	PMT020	This document is used throughout all the processes of the project to log lessons learnt at every stage.
	End Project Report Template	PMT021	This document is used especially for a more complex project with lessons learnt are logged and the project is in the process of being closed out.
	Service Provider Performance Management (SPM)	PMT022	This document is used to evaluate the contractor/service provider performance using selected KPI's as per agreement by the two (2) parties via the SPM.

Project Management Tools

Project Process Group	Project Management Tool	PM Document Number	Document Description and Purpose
Other Supporting Documents			
	PM Basic Training Slides	PMT023	This document contains some slides in powerpoint format which can be used as an introductory training guide to Project Management.
	(Indicative) PM Rate Sheet	PMT024	The document provides a guide to potential fees for Project Management Services, by years of experience of a certified Project Manager. These figures are provided as a guide only and may fluctuate or vary according to project/project service. All fees should be negotiated between the NGO and Service Provider before work commences.
	Risk Log/Register	PMT025	This document guides the preparation of an itemized listing of the risks that could derail the project. For example, a supplier delivering their product late. The PMI Book of Knowledge notes that a risk register is a document in which the results of risk analysis and risk response planning are recorded.
	PM ToolKit Table of Contents	PMT026	Provides a guide and description of each project tool document and when in the project each document should be used.

Feedback

