

# 07 - Final Notes (Second Module)

## Where is this course?

- Google Career Certificates - Project Management

## My Notes

My notes for this overall course will be laid out by module in the course, and have subheadings in order to differentiate between different topics/videos that are presented in the courses. I'll add in any extra notes/resources that I use where necessary, and hope it will be helpful for anyone looking!

## Introduction: Defining project goals, scope and success criteria

- Goals, scope and success criteria
  - Officegreen
    - Lead project manager
    - Commercial landscaping company
      - Specialises in plant décor for offices and other businesses
    - Director of Product has an idea for a new service
      - *Plant Pals*
        - High volume customers are offered small, low maintenance plants for their desks
        - As the project manager, are responsible for the rollout of this new service

## Determining project goals and deliverables

### Project Goal - Definition

The desired outcome of the project

- Project goals and deliverables
  - Project Goal
    - What you have been asked to do, and what you are trying to achieve
    - Example

- Improve customer response times for inquiries via email by 20%
- **Officegreen example**
  - Increase revenue by 5% by the end of the year
  - Through the introduction of "plant pals"
    - Desk plants for top customers
  - "Increase revenues through a new services offering by 5%"
- Allows for a roadmap to your destination
- **Good vs Bad goal**
  - How well it is defined
  - "How clear and specific is the goal?"
    - If the goal is the destination, are you confident that you'll know if you've even arrived?
  - Generally make it something clear (such as a numerical increase, and something that isn't vague)
  - Also says how to do, what you have been asked to do
    - "via email"
    - "via a new service offering"
    - And then by how much
      - 5%
      - 20%
- **Stakeholders**
  - Get information from stakeholders
  - Ask how it aligns to the company's larger goals and mission
  - Example
    - Finished a new product feature
    - Stated goal was to deliver an early version of this feature and collect user feedback
    - When it was delivered for feedback, no one way available
    - Therefore had to discuss if you have met the goal if there is no user feedback
      - Some think that you have achieved the goal
      - Some think that you have not
    - Customer was satisfied, and therefore should've been completed
      - But internal team wasted time going back and forth about it
    - Make sure to keep everyone (stakeholders and team), in the loop about the project goals
- **Project Deliverables**

- The products or services that are created for the customer, client or project sponsor
- What get produced or presented at the end of a task, event, or process
- Help quantify and realise the impact of the project
- Decided upfront by clients/stakeholders
- Hold everyone accountable
- Ask questions, and make sure everyone discusses their expectations and goals
- Tangible outputs that show how more revenue can be generated
- *Customer Response Time*
  - Deliverable is the creation of email templates for typical questions
- *Officegreen*
  - New website page listing the plants available
  - Launching the plant service

## Project Plant Pals: Initiation

- **Initiation**
  - **Refine goals with stakeholders**
    - Meet with the Director of Product (the project sponsor)
    - Discuss aims for the project
    - Clarify goals and keep the project on track
    - Turn them into SMART goals
  - **Assess stakeholder power and influence**
    - Get to know some of the stakeholders
    - Find out how these stakeholders fit into the project
    - Use a stakeholder analysis and power grid
    - Figure out how often you are to communicate with team member, investors, etc.
  - **Assign roles and responsibilities to promote the service**
    - Assemble teams to plan the marketing and sales strategy, and to redesign the website
    - Use RACI (Responsible Accountable Consulted Informed) charts to determine who should be responsible, accounted, consulted and informed about various project tasks
  - **Create a charter for the next stage of the project**
    - Wrapping up the initiation phase
    - Focus will shift into internal operations
    - Create a project charter to guide team as they plan training, fulfillment, and delivery procedures for Plant Pals

# How to set SMART goals

## Metrics - Definition

What you use to measure something

- Setting SMART goals

- Specific

- Can figure out how long it should take
    - Whether it has been accomplished
    - *Improve Customer Service response time*
      - Not specific
      - Just a general statement
      - Could improve by 1%, but is that enough?

- Questions

- What do I want to accomplish?
    - Why is this a goal? (Specific reason, purpose, benefit?)
    - Who is involved?
    - Where should the goal be delivered?
    - To what degree?

- Measurable

- Determine that they are objectively met
    - Track progress, and stay motivated
    - Questions
      - How much?
      - How many?
      - How will I know when it's accomplished?

- Can sometimes be a simple "yes" or "no"

- Have to use *Metrics*

- Can use numbers or figures

- Use *Benchmarks* (points of reference)

- To make sure you are using accurate metrics

- Look at last year's revenue in order to see what you should aim for this year

- Attainable

- Is it possible?

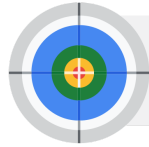
- Questions

- Can it reasonably be reached?

- A little challenging to encourage growth
  - Don't want it to be too extreme, otherwise you can never reach it
  - Aim to find a balance
- How can it be accomplished?
  - Break down the goal into smaller parts, and see if it makes sense
- **Officegreen**
  - Only requires a 1.25% increase in revenue per quarter
  - Reasonable
- **Relevant**
  - **Questions**
    - Does the goal make sense?
    - Is the goal worthwhile?
      - Does the effort balance out with the benefits?
      - Does it match the organisation's other needs and priorities?
    - Is it the right time?
- **Time-bound**
  - Has a deadline
  - Track progress
  - Goes hand-in-hand with metrics
  - Increase revenue by the end of the year
    - Break down how much you need to increase by each quarter, month, and week]

## SMART goals: Making goals meaningful

# S



## Specific

# M



## Measurable

# A



## Attainable

# R



## Relevant

# T



## Time-bound

- **SMART Goals**
  - **Specific**
    - The objective has no ambiguity for the project team to misinterpret.
  - **Measurable**
    - Metrics help the project team determine when the objective is met.
  - **Attainable**
    - The project team agrees the objective is realistic.
  - **Relevant**
    - The goal fits the organization's strategic plan and supports the project charter.
  - **Time-bound**
    - The project team documents a date to achieve the goal.

## Navigating Peer/Self Reviews

- **Peer/Self Reviews**
  - Not just Multiple Choice/Short Answer quizzes
  - Apply what you learnt to real world Project Management problems, and situations
  - Create the types of artifacts project managers use everyday
  - Finish these hands on activities where you can
    - As it provides practical experience for interviews

- Allows you to manage projects better in your personal or professional life
- **Self Review**
  - Follow step-by-step instructions to move the project forward
  - Quizzes with "Activity" in the title
  - When you finish an activity, taken through an Exemplar of the completed activity to compare with own work
  - Review the exemplars carefully so you know what you did well, and what to improve for next time
  - Some activities may have multiple right answers
  - Exemplars only explain one way of doing things
    - But it gives guides for other approaches
    - Therefore not just the answers, but shows what approaches you can take
- **Quiz Questions**
  - May be graded or ungraded
  - Measurement of progress
  - Expand knowledge
- **Peer-Review Assignments**
  - Similar format to Self Review
  - Classmates will grade your assignments, and you will grade theirs.
  - Have to grade at least 2 submissions (can grade more)
  - Gives objective feedback, and allows for you to see how others did a similar problem
  - Use a rubric to grade
    - Checklist of items, each with a mark allocation
    - Score at least 80% to pass
      - If a Rubric has 10 points, need at least 8
    - Rubric is available before the assignment is submitted, so you are able to see how you will be graded
    - Give and receive qualitative feedback
  - Feedback
    - Positive and Negative feedback
    - Leave thoughtful and constructive feedback

## Optional: What to know about peer-graded feedback

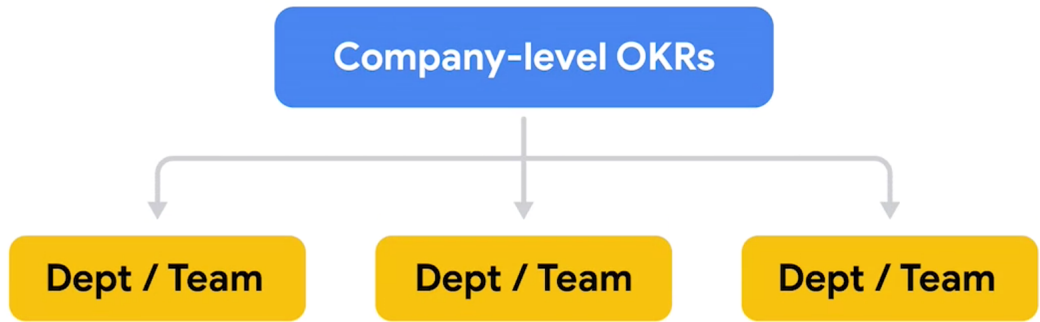
- **Peer Graded Assignments**
  - **Submitting Work**
    - Generally involve submitting documents or spreadsheets for review

- Can submit as a URL (a shared Google Doc for example), or a downloadable file (such as .docx or .pdf)
- To grade your assignment, graders will access the link, or download the file submitted
- Try submitting it a day or two before the deadline, to allow for timely feedback
- **Links**
  - [Coursera Help Center | Submit peer reviewed assignments](#)
  - [Coursera Help Center | Getting and viewing grades for peer-reviewed assignments](#)
  - [Sharing Google files for Peer-Graded activities | Coursera](#)

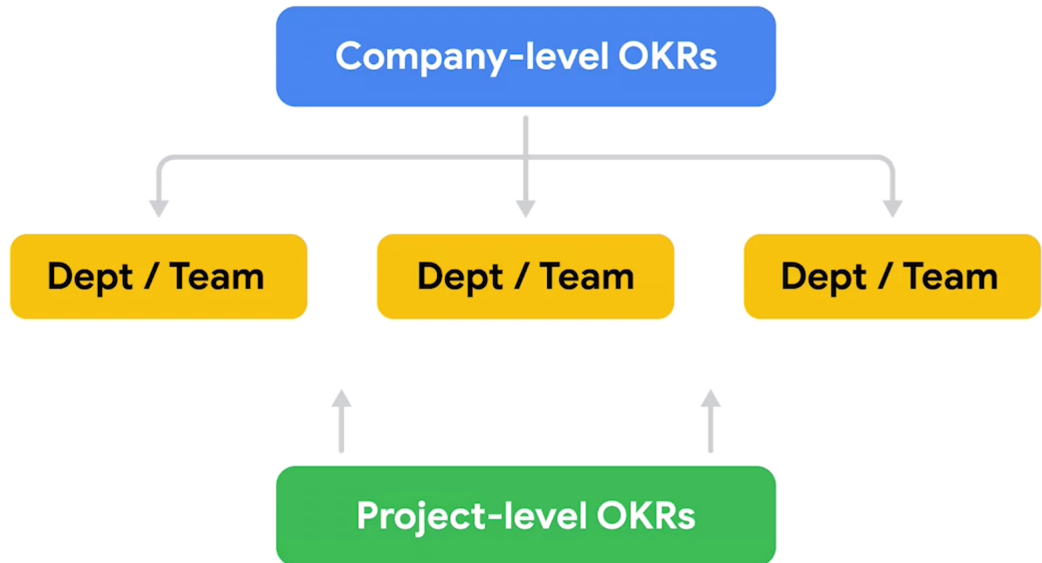
## Introduction to OKRs

- **OKRs**
  - "Objectives + Key Results"
  - Combine a goal and a metric to determine a measurable outcome
  - Clearly state goal, and provide specific details to measure success
  - Separate different components of SMART goals, and clarify them even further
  - Can be used to create "stretch goals"
    - Challenges to achieve
  - If you are able to achieve all the key results, may have made the OKRs a bit too easy
- **Objective**
  - Similar to goals
  - Defines what needs to be achieved
  - Describes a desired outcome
    - Increase in customer retention
    - Improvement in employee onboarding process
- **Key Results**
  - Defines how you'll know whether or not you've met your objective
  - Measurable outcomes that define when the objective has been met
    - Objective: Improve customer retention
      - Key Result: achieve a 90% customer satisfaction rating by the end of the first quarter
    - A bit more ambitious
- **OKR Levels**
  - **Company/Organisation**





- 
- Commonly shared among the organisation
- Everyone is clear on the company goals
- Updated on an annual basis
- Helps drive the organisation in the direction it wants to go
- Department/Team
- Project



- 
- Created in the initiation phase
- Need to align with and support both company and department level OKRs
- Office Green Company-wide OKRs
  - Objective
    - Increase customer retention by adapting to the changing workplace environment
  - Project (Plant Pals) OKRs
    - Objective
      - Enroll existing customers in the Plant Pals service
    - Key Result
      - 25% of existing customers sign up for the Plant Pals pilot

- **Key Results**
  - 95% of phone, chat, and email customer support tickets are resolved during the first contact
  - Top 3 most requested new offering for distributed office environments are in pilot by the end of the second quarter
  - Sales and support channels are available 24/7 by the end of the year
    - **Office Green Sales Department OKRs**
      - **Objective**
        - Increase the sales team presence
      - **Key Result**
        - New sales offices are open in 10 cities by the end of the year
  - These Key Results can be the basis for projects themselves
    - *"Top 3 most requested new offering for distributed office environments are in pilot by the end of the second quarter"*
      - Could involve the Plant Pals project

## Creating OKRs for your project

- **OKRs**
  - **What are OKRs?**
    - Objectives and Key Result
 

Objectives	Key results
<ul style="list-style-type: none"> <li>• Defines what needs to be achieved</li> <li>• Describes a desired outcome</li> </ul>	<ul style="list-style-type: none"> <li>• The measurable outcomes that objectively define when the objective has been met</li> </ul>
    - Combines a goal and a metric to determine a measurable outcome
    - Company-wide OKRs are used to set an ultimate goal for an entire organisation
    - Team, department and project-level OKRs describe focused results each group needs to do in order to support the organisation
  - **OKRs and Project Management**
    - Can help in expanding upon project goals and further clarify the deliveries you'll need from the project to accomplish the goals
    - Allows for an appropriate scope for a team (in a project-level OKR), therefore allowing for you to say "no" to requests that may get in the way
    - Can create and push project-level OKRs to help motivate the team, as they are used to push past what is easily achievable
  - **Creating OKRs**
    - **Set your objectives**

- Project objectives should be aspirational, aligned with organisational goals, action-oriented, concrete and significant
- Consider the vision you and your stakeholders have for your project, and determine what you want the project team to do
- **Examples**
  - Build the most secure data security software
  - Continuously improve web analytics and conversions
  - Provide a top-performing service
  - Make a universally-available app
  - Increase market reach
  - Achieve top sales among competitors in the region
- **Strong Objectives Criteria**
  - Aspirational
  - Aligned with organizational goals
  - Action-oriented
  - Concrete
  - Significant
- **Questions to ask to create an Objective**
  - Does the objective help in achieving the project's overall goals?
  - Does the objective align with company and departmental OKRs?
  - Is the objective inspiring and motivational?
  - Will achieving the objective make a significant impact?
- **Develop key results**
  - Add 2-3 key results for each objective
  - Should be time-bound
  - Can be used to indicate the amount of progress to achieve within a shorter period
  - Or to define whether you have met your objective at the end of the project
  - Should be challenging
- **Examples**
  - X% new signups within first quarter post launch
  - Increase advertiser spend by X%
  - New feature adoption is at least X%
  - Maximum 2 critical bugs are reported by customers per Sprint
  - Maintain newsletter unsubscribe rate at X%
- **Strong Key Results Criteria**
  - Results-oriented—**not** a task

- Measurable and verifiable
- Specific and time-bound
- Aggressive yet realistic
- **Questions to ask to create a Key Result**
  - What does success mean?
  - What metrics would prove that we've successfully achieved the objective?
- **OKR Development best practices**
  - Think of objectives as motivational and inspiring
  - Think of key results as tactical and specific
  - Objective describes what you want to do, and key results describe how you'll know you did it
  - Develop 2-3 key results for each objective
  - Document OKRs and link them into the project plan
- **OKRs vs SMART goals**
  - [SMART Goals vs. OKRs | Smartsheet](#)
- **More resources**
  - [What Matters: OKR Google playbook: Examples & templates](#)
  - [How to Create and Track Goals in Asana | Product Guide • Asana Product Guide](#)
  - [What Matters: OKR vs. SMART goals: What's the difference?](#)
  - [OKRs and KPIs: What They Are and How They Work Together - Reflektive](#)
  - [How OKR and project management work together - Perdo](#)
  - [OKR Examples - Company Objectives & Key Results | Adobe Workfront](#)

## Launching and landing a project

### Project Launch - Definition

Delivering the final result of your project to the client or user

### Project Landing - Definition

Measuring the success of your project using the success criteria established at the outset of the project

- **Launching and Landing**
  - Know when it is successful
  - Continue beyond the point of delivering the project

- Make sure it functions as intended
- **Office Green**
  - Even though the launch might be successful, have to wait to make sure there are no unintended issues
  - Such as things may be dying
- Make sure to wait for the "land", as that is the main form of success
- Make sure to define what a successful landing looks like for a particular project

## Defining Success Criteria

### Adoption - Definition

Adoption refers to how the customer uses and adopts a product or service without any issues

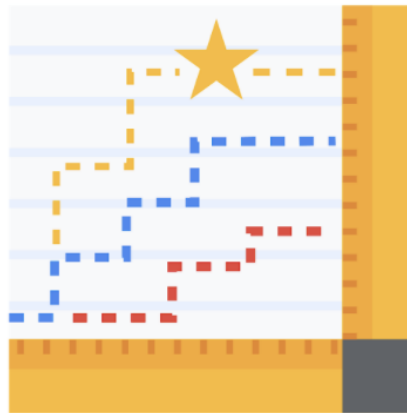
### Engagement - Definition

Refers to how often of meaningful customer interaction and participation is over time

- **Success Criteria**
  - Tells you whether or not the project was successful
  - Specific details of project goals, deliverables, requirements, and expectations
  - The standards by which the project will be judged once it's been delivered to stakeholders
  - Should clarity, and may bring to light questions and areas of disagreement
  - **Key points**
    - Identify the measurable aspects of the project
      - How will I know when it is successfully accomplished?
    - Get clarity from stakeholders on the project requirements and expectations
      - Ask questions, and make sure you know who says when it is successful, and what criteria it may be judged on
      - Document and share all of it
  - **Officegreen**
    - Increase revenue by 5% by the end of the year
    - Website
    - Not enough to just make a list of criteria, create a process by measuring success
      - make adjustments, and ensure success

- Some may use more than one
- Metrics should be closely aligned to goal
  - Happiness metrics
    - Satisfaction
    - Ease of use
    - can use surveys
      - 83% of customers be happy
- Measure with a team, while it's in progress
  - Hold a project review once a month
  - Have team members complete tasks with certain deadlines
  - Hold live feedback sessions with customers and users
- Include methods for how success will be measured, how often it's measured, and who's responsible for measuring it
- Have the appropriate stakeholders sign off on the success criteria
- Defining success criteria should create greater alignment within the team and give everybody better visibility into how to achieve success

## Tracking and communicating success criteria



### Success criteria

- **Success Criteria**
  - **Product Quality**
    - The final product has it's own set of attributes that define it's success
  - *Includes*
    - Completeness in features
    - Quality of features

- Unit cost
- Usability
- etc.
- Applies to any project where you deliver a product or tangible outcome
- Create a list of product requirements
- **Metrics**
  - Track if you implemented the product's priority requirements
  - Track and assess the product's number of technical issues or defects
  - Measure the percentage of features you delivered or released at the end of the project
- **What is important to the customers or stakeholders**
  - Be mindful of stakeholder and additional customer expectations
  - Follow any strategic goals set by the company
  - Make sure that each component of the project is able to meet customer and stakeholder expectations
  - Strategic goals often tie back into the business case, and the reason you initiated the project in the first place
- **Metrics**
  - Evaluating user engagement with the product
  - Measuring stakeholder and customer satisfaction via surveys
  - Tracking user adoption of the product by using sales data
- **Document, align, and communicate success**
  - Understanding where we are and where we are going
  - Get clarity from stakeholder on the project requirements and expectations
    - Many people involved with any project, and success will look different for each of them
- **Questions**
  - Who ultimately says whether or not the project is successful?
  - What criteria will be measured to determine success?
  - What is the success of this project based on?
- Get key stakeholder

## Using OKRs to evaluate progress



**objectives**

**K R**

**key results**

- **OKRs**

Objectives	Key results
<ul style="list-style-type: none"><li>• Defines what needs to be achieved</li><li>• Describes a desired outcome</li></ul>	<ul style="list-style-type: none"><li>• The measurable outcomes that objectively define when the objective has been met</li></ul>

- **Communicating and tracking OKRs**

- **Share OKRs**

- Once you have created OKRs, it is important to communicate them to the team so that everyone knows what to do
    - Allows for focusing and aligning efforts

- **Assign owners**

- Make sure someone is responsible for each key result, so that everyone knows who is responsible for what
    - Adds clarity, and increases accountability

- **Measuring Progress**

- **Determine how you will score your OKRs**

- Can be scored as a percentage of the objective completed
    - Can be scored as the completion of certain milestones
    - On a scale of 1-10
    - Traffic light scale
      - Red: no progress
      - Yellow: some progress
      - Green: completed objective
    - Yes/No methods
      - yes: achieved objective



- no: didn't achieve objective
- Scale
  - example
    - "launch 6 features"
    - Only launched 3
    - Therefore score of 0.5
  - Score ranges from 0.0 - 1.0
- **Set scoring expectations**
  - Expectations can be set from 0.6-0.7 (60-70% completed) across all OKRs
  - Lower scores may indicate that the OKRs are too ambitious
  - Higher scores may indicate that it is not challenging enough
- **Schedule checkpoints**
  - Regularly communicate the status of project OKRs with the team and senior managers
  - A monthly check-up can help, and make sure that goals and objectives have not changed

## Defining project scope

- **Project Scope**
  - Boundaries of a project
  - Agreed upon understanding on what is included and excluded from the project
  - Who the project is delivered to
  - Who is using the project
  - The project's complexity
    - Complex or straightforward?
  - Project timeline
  - Budget
  - Resources
- **Office Green**
  - **Plant Pals**
    - Small low maintenance plants such as cacti and ferns
    - Can order online or on a catalogue
    - Will be shipped to them
  - **Scope**
    - Will you provide replacement plants
    - Who will it be offered
    - Catalogue physical, website?

- How will they order?
- Dimensions of the catalogue
- Black and white
- etc.
- Speak with sponsors and stakeholders, to see what they want
- Also learn what is not included in the project
- **Questions**
  - Where did the project come from?
  - Why is it needed?
  - What is the project expected to achieve?
  - What does the project sponsor have in mind?
  - Who approves the final results?

## Gathering information to define scope

- Defining scope
  - Ask scope defining questions

<b>Stakeholders</b>	How did you arrive at the decision to update the dining space? Did the request originate from the restaurant owner, customers, or other stakeholders? Who will approve the scope for the project?
<b>Goals</b>	What is the reason for updating the dining space? What isn't working in the current dining space? What is the end goal of this project?
<b>Deliverables</b>	Which dining space is being updated? What exactly needs to be updated? Does the dining space need a remodel?
<b>Resources</b>	What materials, equipment, and people will be needed? Will we need to hire any contractors? Will we need to obtain a floor plan and building permits?
<b>Budget</b>	What is the budget for this project? Is it fixed or flexible?
<b>Schedule</b>	How much time do we have to complete the project? When does the project need to be completed?
<b>Flexibility</b>	How much flexibility is there? What is the highest priority: hitting the deadline, sticking to the budget, or making sure the result meets all the quality targets?

## Monitoring and maintaining a project's scope

### In-scope - Definition

Tasks that are included in the project plan and contribute to the project's goal

### Out-of-scope - Definition

Tasks that are not included in the project plan and don't contribute to the project's goal

### Scope creep - Definition

Changes, growth, and uncontrolled factors that affect a project's scope at any point after the project begins

- **Project scope**
  - Point out when things take too much time and too much money
  - Try to avoid scope creep
    - Although it is good to avoid, if it is something small, and can provide a lot of value, can be worth it
    - Sometimes unavoidable, especially when coming from stakeholders and sponsors
    - Although good to be firm, as it can go against the budget and resources
- **Sources**
  - **External**
    - Customer request
    - Environment shifts
    - Tech changes
  - **Solutions**
    - Stakeholders have visibility into the project
    - Know what is being produced, timeline, costs, etc
    - Get clarity on project requirements
    - Set ground rules and expectations for stakeholder involvement
    - Create a plan for dealing with out-of-scope requests
    - Put your agreements and plans in writing
- **Internal**
  - Product improvements
  - Process changes
  - Anytime a team member takes on an extra task, losing time and resources

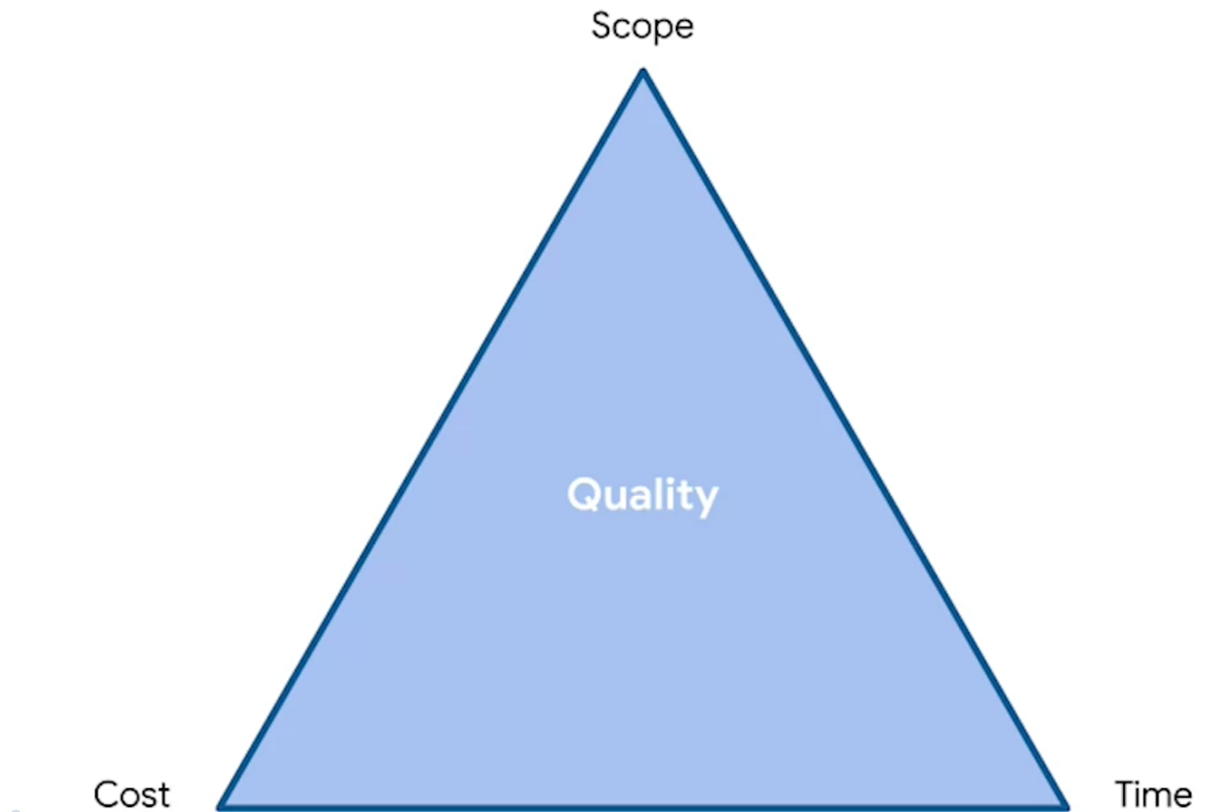
- Maintain limits, and keep everything just at the scope
- Protect it at all costs

## Strategies for controlling scope creep

- Best practices
  - Define your project's requirements.
    - Communicate with your stakeholders or customers to find out exactly what they want from the project and document those requirements during the initiation phase.
  - Set a clear project schedule.
    - Time and task management are essential for sticking to your project's scope. Your schedule should outline all of your project's requirements and the tasks that are necessary to achieve them.
  - Determine what is out of scope.
    - Make sure your stakeholders, customers, and project team understand when proposed changes are out of scope. Come to a clear agreement about the potential impacts to the project and document your agreement.
  - Provide alternatives.
    - Suggest alternative solutions to your customer or stakeholder. You can also help them consider how their proposed changes might create additional risks. Perform a cost-benefit analysis, if necessary.
  - Set up a change control process.
    - During the course of your project, some changes are inevitable. Determine the process for how each change will be defined, reviewed, and approved (or rejected) before you add it to your project plan. Make sure your project team is aware of this process.
  - Learn how to say no.
    - Sometimes you will have to say no to proposed changes. Saying no to a key stakeholder or customer can be uncomfortable, but it can be necessary to protect your project's scope and its overall quality. If you are asked to take on additional tasks, explain how they will interfere with the budget, timeline, and/or resources defined in your initial project requirements.
  - Collect costs for out-of-scope work.
    - If out-of-scope work is required, be sure to document all costs incurred. That includes costs for work indirectly impacted by the increased scope. Be sure to indicate what the charges are for.

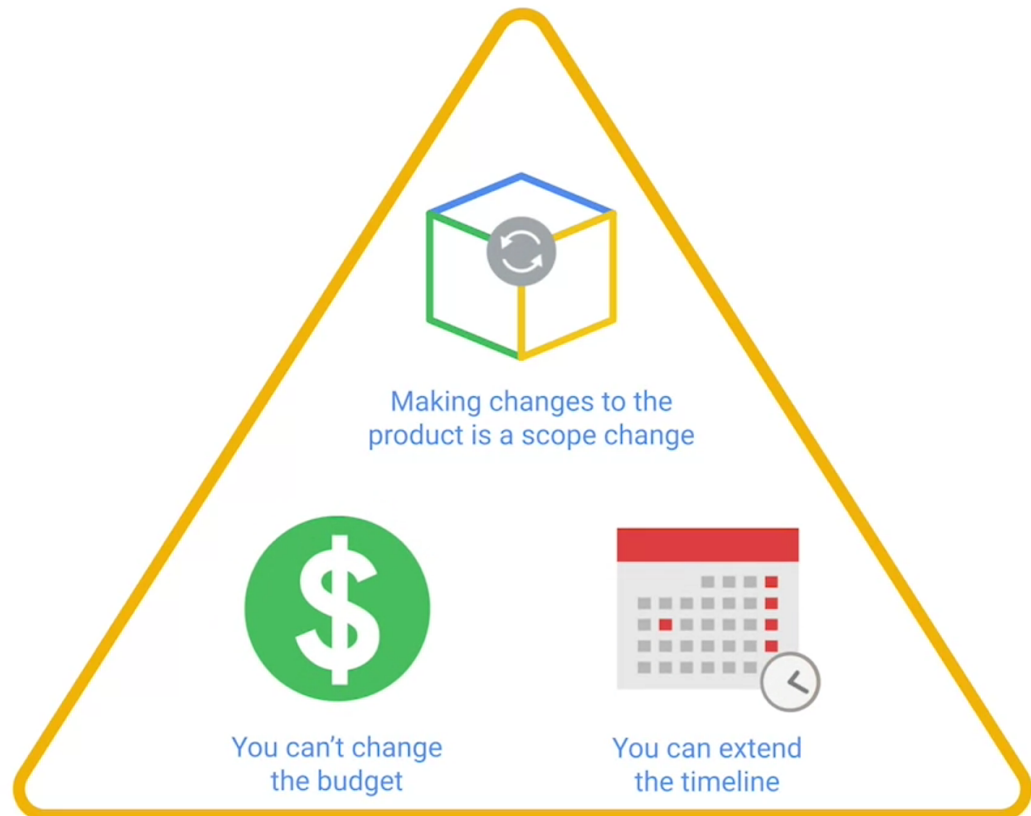
## Managing changes to a project's scope

- **Project Scope**
  - Deliver within the project's scope agreements
  - Within the given deadline, and approved budget
  - May need to make compromises, and weigh up trade offs, as situations arise
  - Every time a team member is doing something else apart from the task, more than just time is lost
- **Triple constraint model**

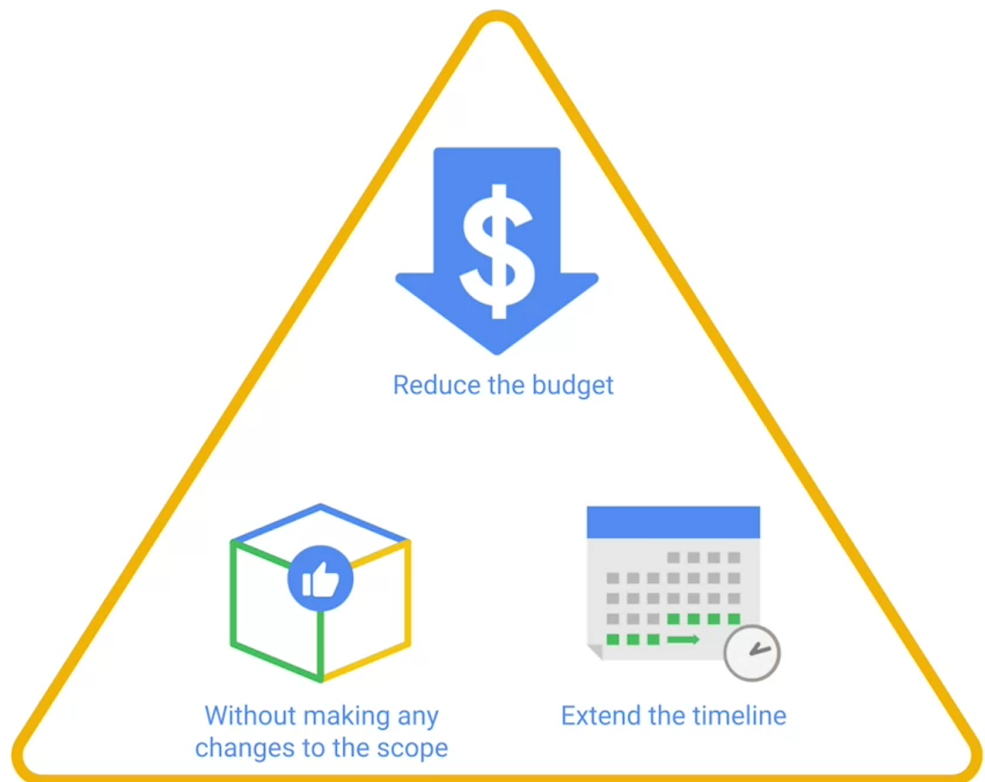


- Three most significant restrictions of any project
- **Time**
  - Timeline
  - Schedule
  - Deadlines
- **Cost**
  - Budget
  - Resources
  - People that will work on it
- **Scope**
  - The limitations of the project's boundaries
- A change in any of the three has an affect on the other
  - A decrease in budget affects the time and scope

- Look at what you are willing to trade off
  - Such as if there is a specific deadline that must be met, need to limit any changes to the scope
  - Must look or function a certain way
    - Scope is a priority, justify changes in time or cost
- Just because you can make a change doesn't mean you should make a change
- You are able to ask stakeholders and project sponsors
- Office Green
  - Wants to have a pot that will tell you when to water it



- 
- Can extend the timeline to compensate
- A request has been made to reduce budget, without changing scope



- Finish early

