

00 - Identifying Project Goals

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

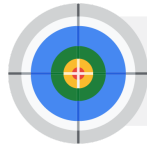
What you use to measure something

- **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

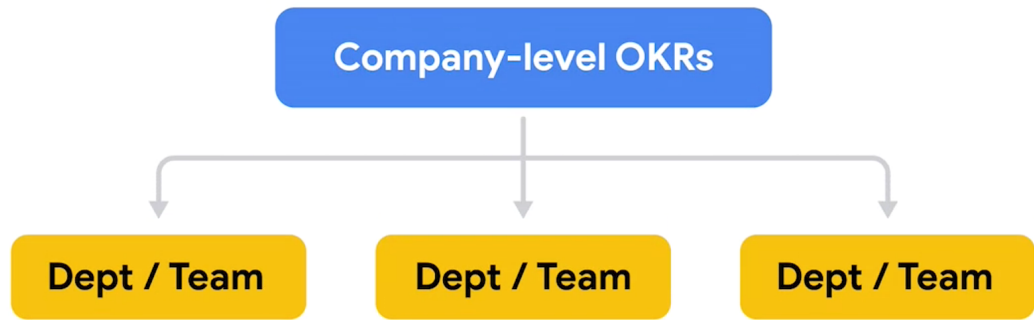
Optional: What to know about peer-graded feedback

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

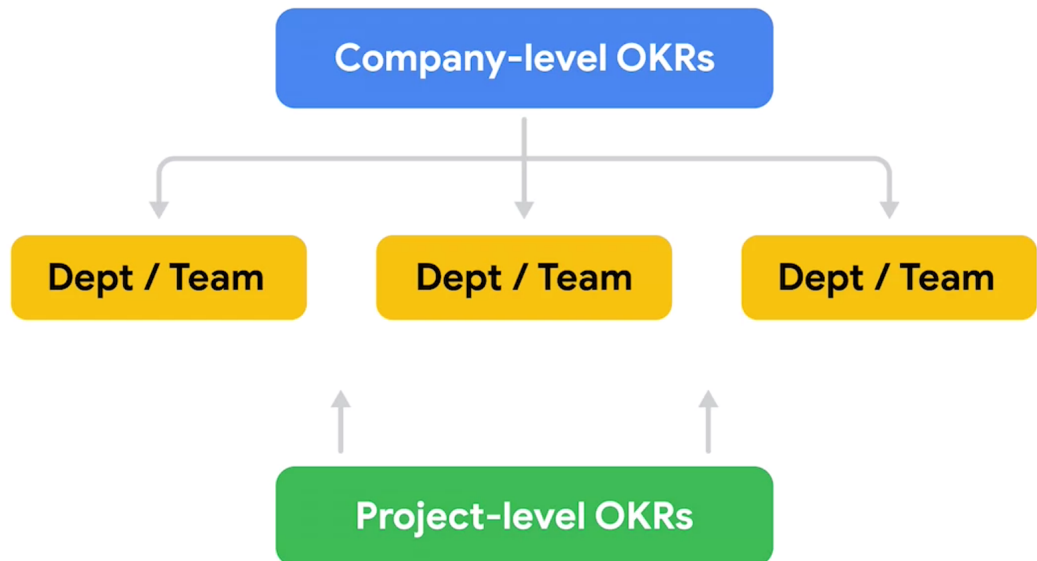
- Can submit as a URL (a shared Google Doc for example), or a downloadable file (such as .docx or .pdf)
- To grade your assignment, graders will access the link, or download the file submitted
- Try submitting it a day or two before the deadline, to allow for timely feedback
- **Links**
 - [Coursera 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**



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- 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



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- 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 <ul style="list-style-type: none"> • Defines what needs to be achieved • Describes a desired outcome | Key results <ul style="list-style-type: none"> • The measurable outcomes that objectively define when the objective has been met |
|--|--|
- 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 - Perdoo](#)
 - [OKR Examples - Company Objectives & Key Results | Adobe Workfront](#)