Understanding Before Doing Workshop

Introduction to Project Management

Session #3

May 8, 2024

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Agenda

- Workshop Framework
- References
- Review Creating a Culture of Success (Leadership)
- Where we are in the planning process
- Introduction to Project Management
- Key Take Aways
- Discussion
- Questions

Workshop Framework

Project Management (PM) Session Purpose: To provide an overview of PM.

Foundation	Planning	Project Management
• Leadership Overview • Planning Overview • Project Management Overview • Key Take Aways	• Leadership Primer • Introduction to a planning process • Review Templates • Summary • Key Take Aways	• Leadership Primer • PM Overview • PM Templates & Tools • PM Templates • Key Take Aways

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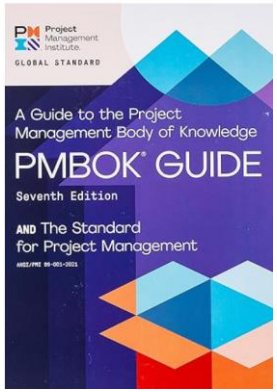
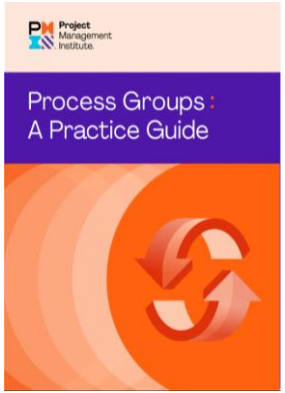
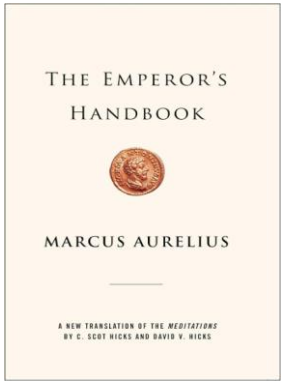
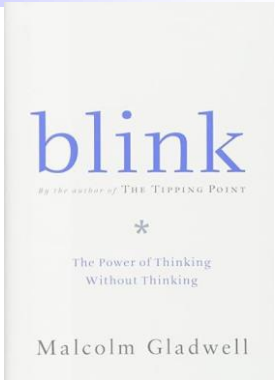
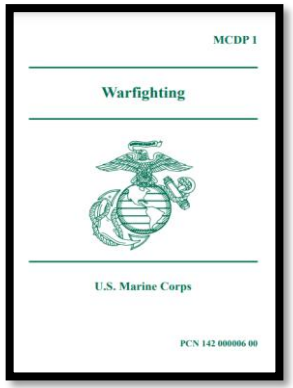
References

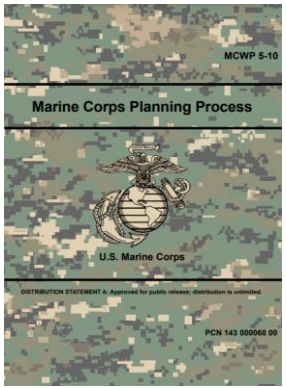


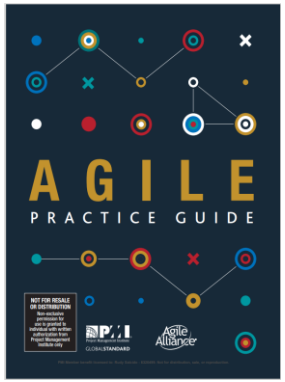












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Creating a Culture of Success

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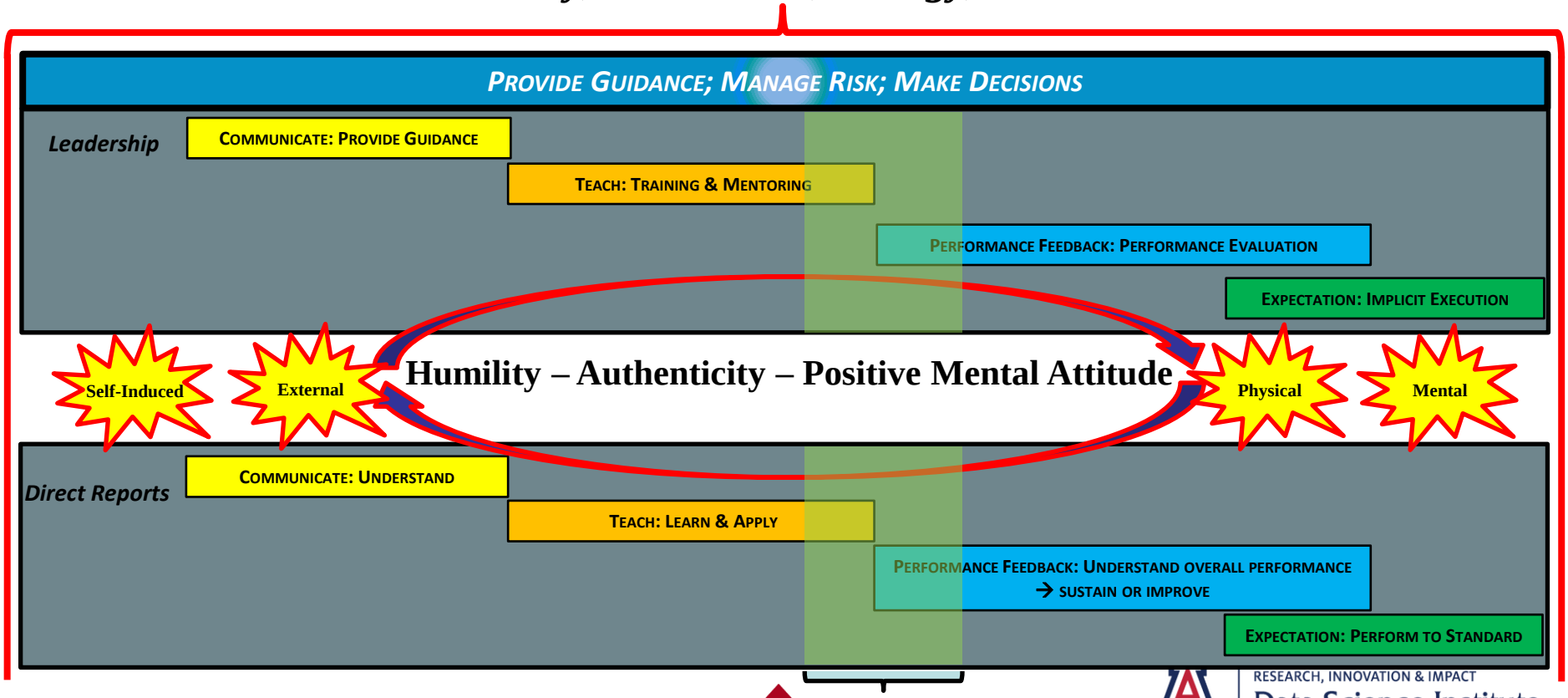
Lead Where You Are

Consistency, Persistence, Energy, & Patience



Warfighting. (1997). *Marine Corps Doctrinal Publication 1*. Washington, D.C.: Headquarters, U.S. Marine Corps.

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Creating a Culture of Success

Challenges

- Conflict Management
- Biases
- Professional Insecurity

Recommended Actions

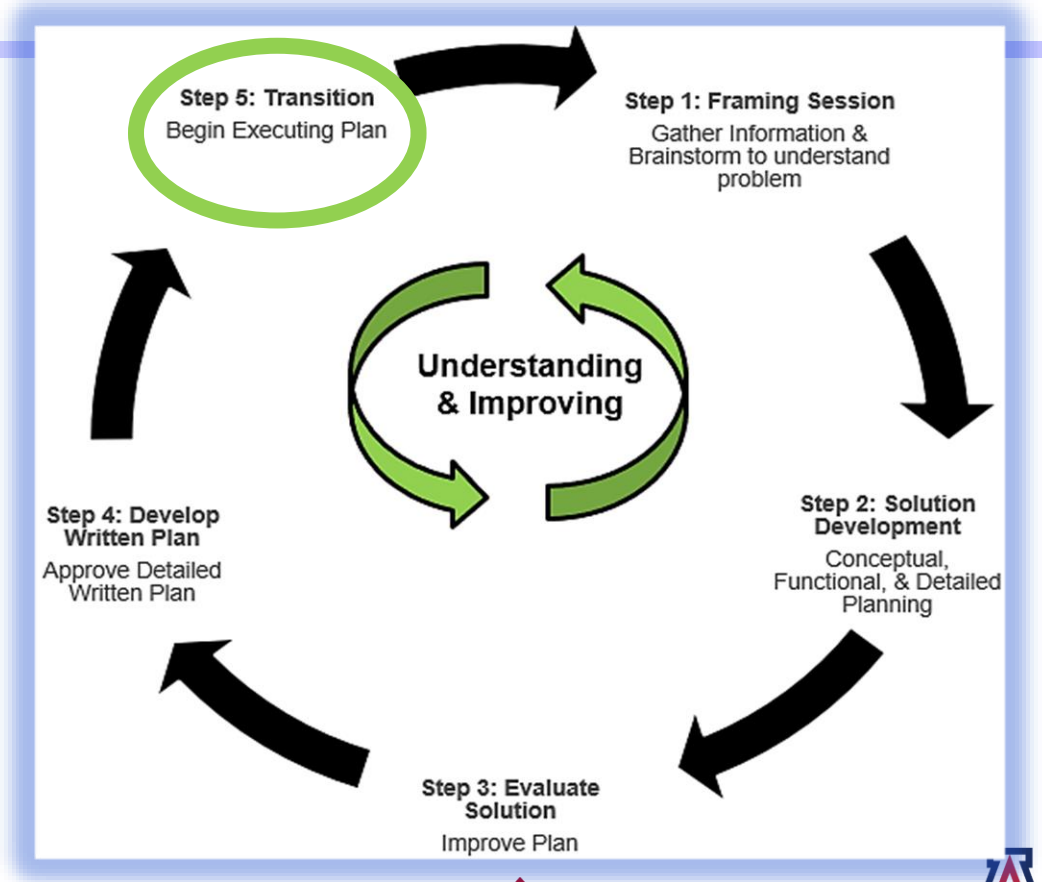
- Emotional Intelligence
- Be Engaged & Be Involved
- “Lead People & Manage Things” Mentality

Gladwell, Malcolm (2006). *Blink: The Power of Thinking Without Thinking.* Harlow, England: Penguin Books.

The standard for project management and a guide to the project management body of knowledge (PMBOK), Seventh Edition. (2021). Newtown Square, PA, Project Management Institute, Inc.

Where we are in the planning process

A Planning Process



Marine Corps Planning Process (2010). *Marine Corps Warfighting Publication 5-1*. Washington, D.C.: Headquarters U.S. Marine Corps.

Planning Process
Step Five: Transition

Purpose: To transition the team's focus from planning to execution.

Key Inputs	Team Actions	Key Outputs
• Approved detailed written plan	• Kickoff Meeting	• Common understanding of plan • Expectations are set • Acknowledgement to begin project

Project Management Overview

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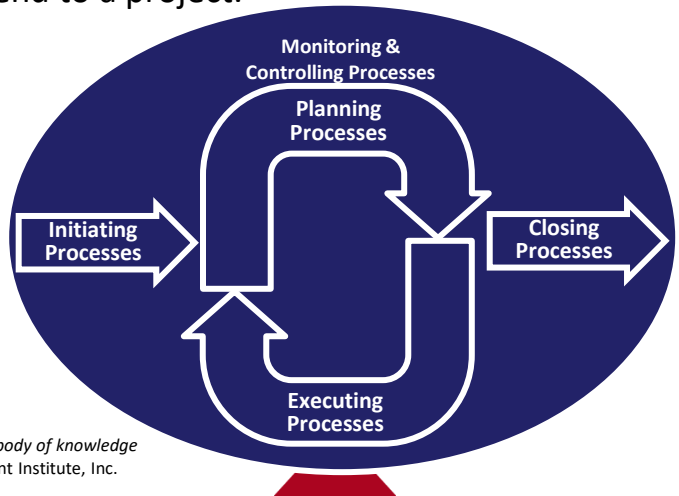
Definition of Project Management

- Project Management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements (***PMBOK Guide***, 7th Edition)

- Project Management Process Groups: Initiating; Planning; Executing; Monitoring & Controlling; Closing (***PMBOK Guide***, 7th Edition)

Project Management Process Groups

- **Initiating**: Acknowledge the project will begin, grant approval to commit the organization's resources to working on the project.
- **Planning**: Formulate and revise project goals and objectives and create project plans.
- **Executing**: Put the project plans into action.
- **Monitoring & Controlling**: Measure and analyze performance to determine if the project is staying true to the project plan.
- **Closing**: Bring formal, orderly end to a project.



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Why Project Management is Important?

- Helps a team organize monitoring & controlling of tasks and deliverables from executing phase to close phase.

Project Team

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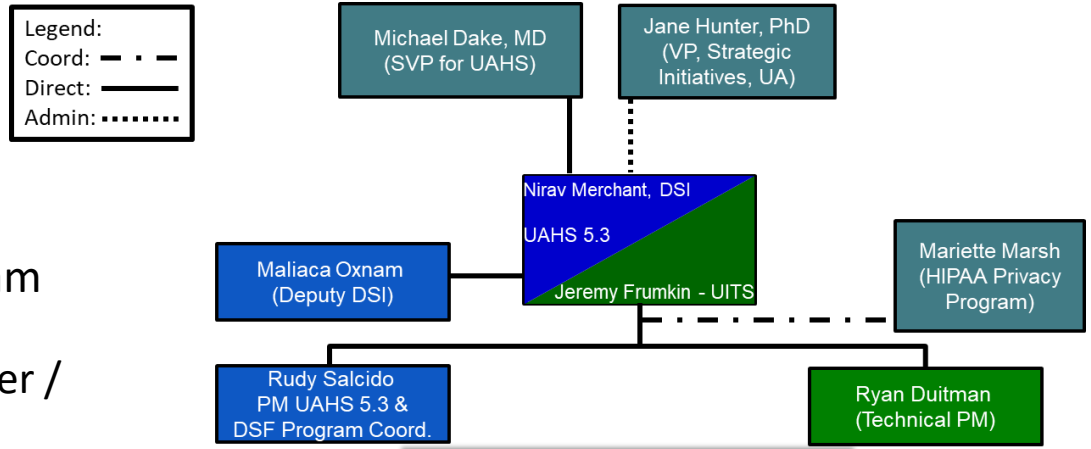
Example Project Key Personnel – Lab or Project

- Stakeholders
- Leadership Team
- Program Manager / Scrum Master
- Project Team / Planners



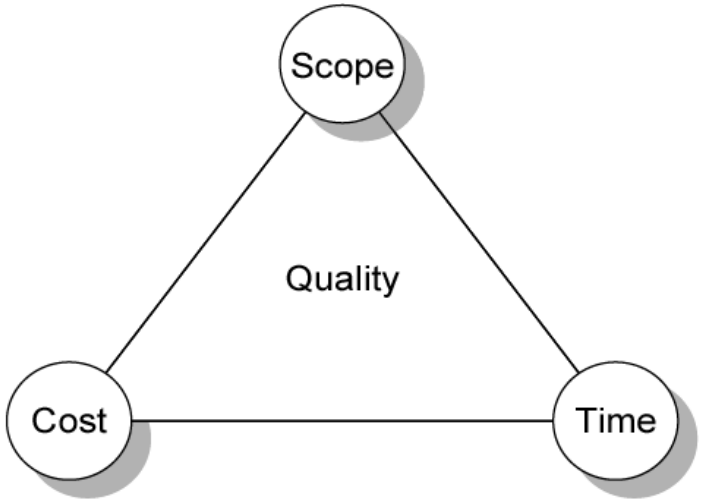
List of Planners

*Tina Johnson, Website Lead, DSI
*Vern Pilling, Director, Biomedical Informatics Services
*Sarah Roberts, Discovery Env. Lead, CyVerse
*Todd Merritt, UITS RT
*Jason Sullivan, UITS NetOps
*Will Stoltz, Systems Admin
*John-Amos Stompoly, Research Consultant
*Edwin Skidmore, Dir., Infrastructure, CyVerse
*Andy Edmonds, System Admin, CyVerse
*Jim Davis, Infrastructure Services Manager, DSI
*Doug Cromey, Imaging SME
*Chidi Ugonna, XNAT SME
*Artin Majdi, DSI, XNAT
*Tony Edgin, Data Engineer, CyVerse

Project Management Considerations

Project Considerations

- Project Scope
- Time constraints
- Budget (Cost)
- Strategic importance
- Need for innovation
- Complexity (number of external agencies)
- Stability of resource requirements
- Need for integration (number of departments involved)



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Project Management Triangle: What It Is, How to Use It (2023). *Asana.* Retrieved from https://asana.com/resources/project-management-triangle

Organization Considerations

- How important is the project to the department's success?
- What percentage of core work involves projects?
- What level of resources (human and physical) are available?

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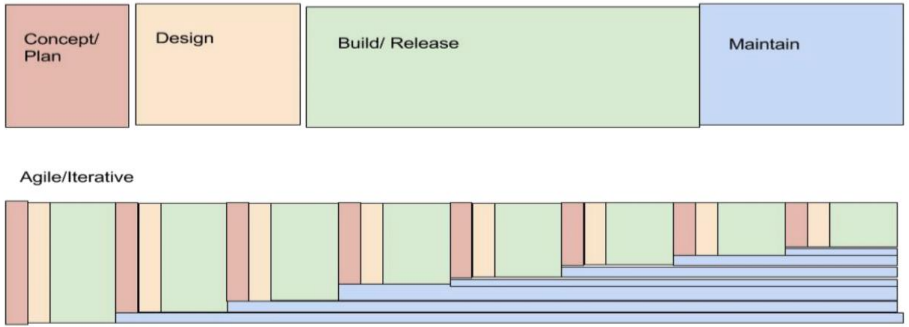
Project Management Methodologies

Different Project Management Methodologies

- Predictive
  - Manufacturing
  - Construction
  - Some reference as waterfall or traditional



- Agile
  - Software Development
  - Agile methodology tailored for projects (i.e., Scrum, LabScru

Table 3-1. Characteristics of Four Categories of Life Cycles

Characteristics				
Approach	**Requirements**	**Activities**	**Delivery**	**Goal**
Predictive	Fixed	Performed once for the entire project	Single delivery	Manage cost
Iterative	Dynamic	Repeated until correct	Single delivery	Correctness of solution
Incremental	Dynamic	Performed once for a given increment	Frequent smaller deliveries	Speed
Agile	Dynamic	Repeated until correct	Frequent small deliveries	Customer value via frequent deliveries and feedback

- Hybrid
  - Mix between agile & predictive

Agile Practice Guide (2017). Newtown Square, PA, Project Management Institute, Inc.

The standard for project management and a guide to the project management body of knowledge (PMBOK), Seventh Edition. (2021). Newtown Square, PA, Project Management Institute, Inc.

The effort distribution of Agile vs Waterfall. Image Credit: Wikimedia Commons CC BY 4.0

Expectation Management

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Project Management Expectations

- Helps with tracking tasks, milestone achievement, schedules, critical due dates, overall project timeline
- Helps with managing resources and budget (costs)
- Helps with communication across stakeholders, project management team, and project team
- Helps with facilitating collaboration and timely accomplishment of tasks

Marine Corps Planning Process (2010). *Marine Corps Warfighting Publication 5-1*. Washington, D.C.: Headquarters U.S. Marine Corps.

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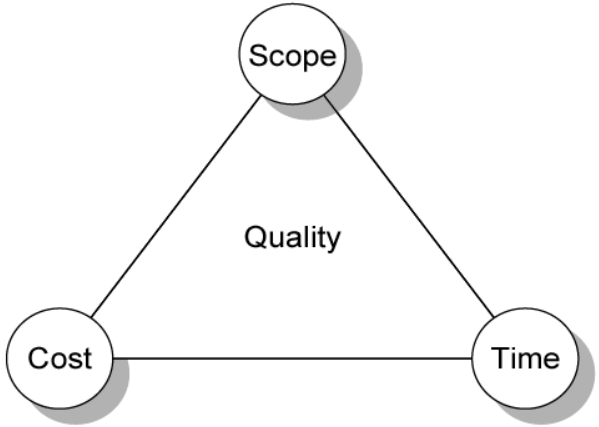
Project Management Limitations

- Does not substitute effective leadership
- Does not substitute proper planning
- Does not substitute sound judgment
- Does not substitute decision making across the project management team



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Project Management Templates & Tools

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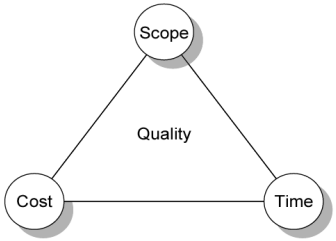
Project Management Templates

- Gantt Chart
- Work Breakdown Structure (WBS)
- Responsible, Accountable, Consulted, Informed (RACI) Matrix
- Project Tracker
- Project Plan
- Project Roles & Responsibilities

Link to the above PM Templates:
https://arizona.box.com/s/950fi6bvymhrqhsw19cy2snd1l309aiw

Project Management Software & Tools

- Asana (for collaboration - project tracking)
- Microsoft 365 (easy to use comprehensive project management tool)
- Smartsheet (easy to use project management tool)
- Jira Software (agile style project management)
- Trello (create visual templates, i.e., Kanban boards, cards, checklists)
- Many more.....



Lead Where You Are

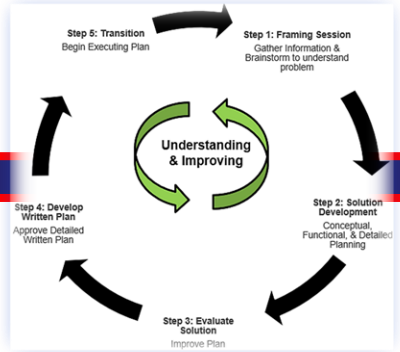
Consistency, Persistence, Energy, & Patience

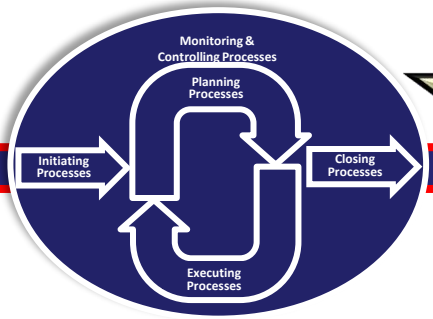
PROVIDE GUIDANCE; MANAGE RISK; MAKE DECISIONS

Leadership

Humility – Authenticity – Positive Mental Attitude

Direct Reports





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Key Takeaways

- Leadership is responsible for creating the work environment for their teams to **thrive and achieve** productive dialogue, cooperation, collaboration, & critical thinking.
- Leaders & Team Members must **understand** their role & take **ownership** of their contributions for project success.
- Project Management **does not think for you.**
- 'Understanding Before Doing' is **continuous** throughout planning & during execution.

Discussion

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Discussion Questions

- Provide a leadership example or leadership attribute you can implement immediately to enhance cooperation, collaboration, and communication across your team?
- Why is it leadership important to project success?
- How can planning help you in developing effective project plans in the future?
- What project management software or tools can you implement in current or future projects to help achieve project success?

Questions

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