Project Management

A SOP presentation for future reference

What's the problem

We are a small team with a wide range of services trying to move towards a SAAS business model.

There is a disconnect between critical paths of the full project workflow.

GAP between expectations and requirements.

Preparation of project work - Project Management Frameworks

Solution

Introduce a transparent framework that builds a repository of knowledge while executing the projects.

Use each project as a continuous improvement opportunity.

Supportive transition and training to use the Framework.

The Lean Machine

Lean (any variance of it) - is designed to eliminate waste, reduce re-work, and organise work and processes better.

We are taking critical aspects of the Lean methodology to fill the GAP between where we are, and where do we want to be.

This Document Highlights our Lean Project Management Strategy.

High Level Process

Proposal
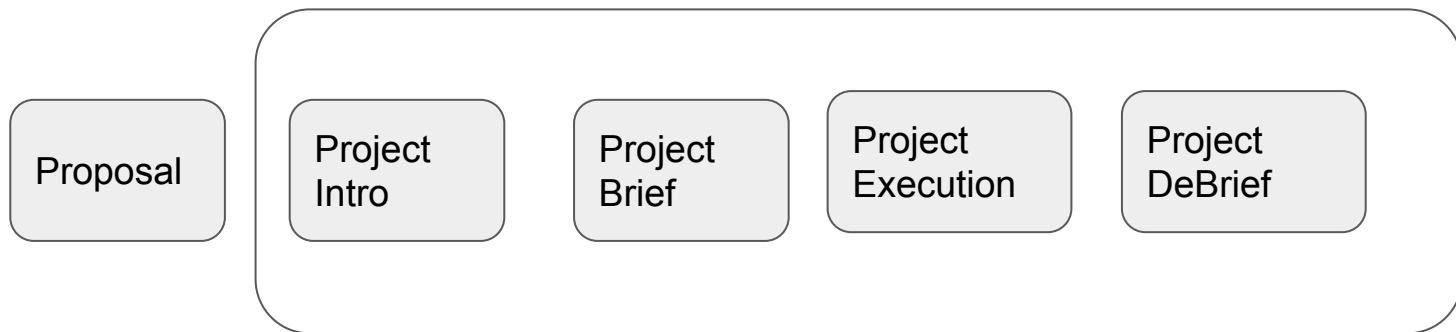
Project Intro

Project Brief

Project Execution

Project DeBrief

High Level Process

Proposal	Project Intro	Project Brief	Project Execution	Project DeBrief

You don't have to use the exact templates if I'm not available just have the same structure

Project Introduction

Task Sorting For (project name)

Task sorting is design to list the self explanatory titles of your task and start explain them to the team - the task after are grouped and the assign to the team members to prepare the description

01 PREPPING TASKS

· The team leader defines key task max 10 and then it explains them to the team
· While the team leader explain the key tasks the team must give feedback on peripheral
, supporting tasks and potential road blocks

Write a note here..	Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..	Write a note here..

**Drag tasks on
left to categories
On right** >

02 TASK SORTING

· The team discussed key category groups in this project (Development, Reporting, Modelling, EmpowerApp PowerBI, etc)
· Task sorting will provide the foundation for team member task distribution.
· Each category is a subtask inside the project and each task under is a sub sub task in asana.

Spot Price Forecast	Outputs	Input	POWERBI
EmpowerAPP	Development	WRITE CATEGORY NAME...	WRITE CATEGORY NAME...
WRITE CATEGORY NAME...	WRITE CATEGORY NAME...		

Project Introduction

With the full team involved dissect the proposal to discover the tasks that are behind the project.

Group them in different categories "like"

- Forecast
- New Dev
- Update
- At risk
- Not clear
- Needs Follow up etc..
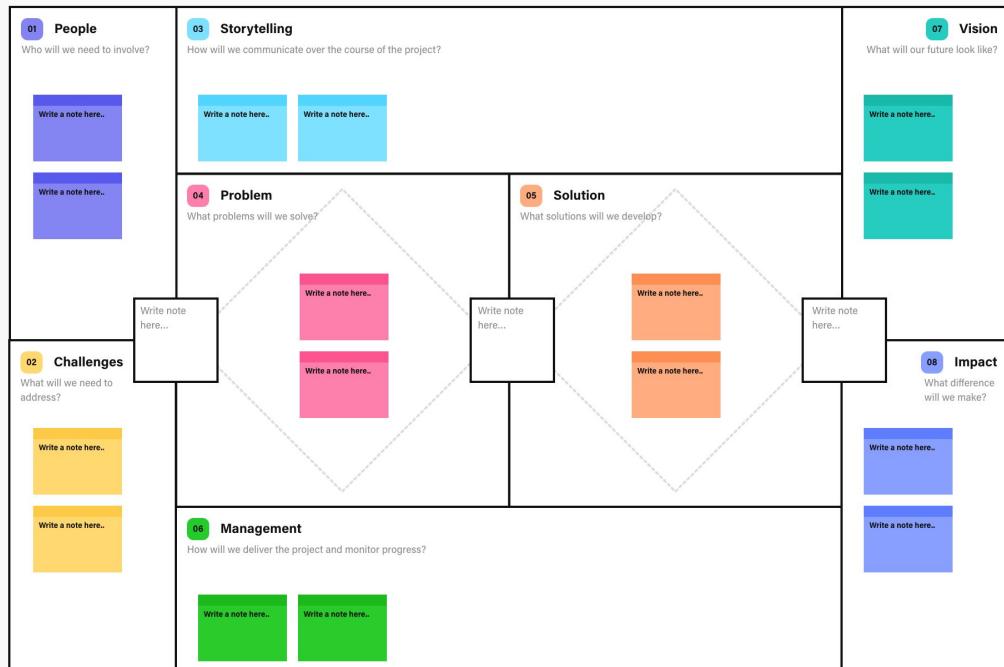
Project Brief

The Project template will be the one in Dropbox paper

https://paper.dropbox.com/doc/ddmmyy-Project-Namer-Client-Name-Live-Brief-Template-WIP--A5oEv_8KXuf2GaIBlT3Ni4UhAQ-CtuBZviTL14tWQAgLOQwr

I will manage the creation and management of the new templates while the team get more confident with a full target transition in 3 months.
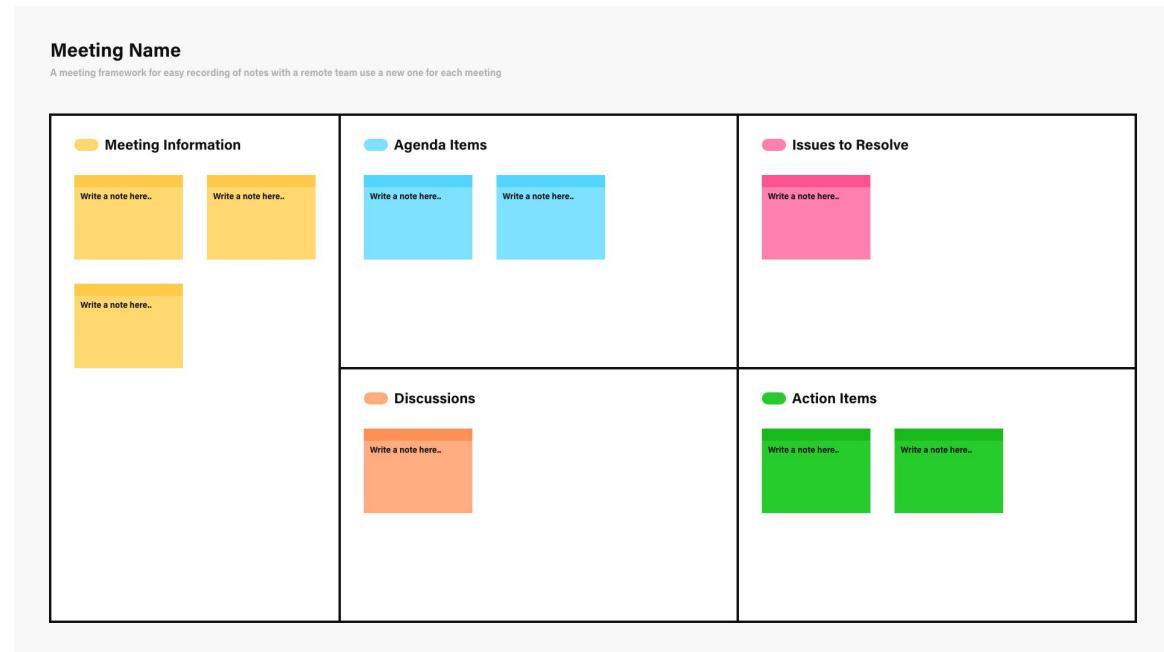
Project Execution

Meetings

All schedule project meeting need to be prepared and recorded.

When the meeting is completed, this asana card may need an update.

Meeting Name

A meeting framework for easy recording of notes with a remote team use a new one for each meeting

Meeting Information

Write a note here..

Write a note here..

Write a note here..

Agenda Items

Write a note here..

Write a note here..

Issues to Resolve

Write a note here..

Discussions

Write a note here..

Action Items

Write a note here..

Write a note here..

Project Execution

Daily Standups are critical for a complex project.

We meet first thing in the morning and ask to discuss any items that are blocking progress.
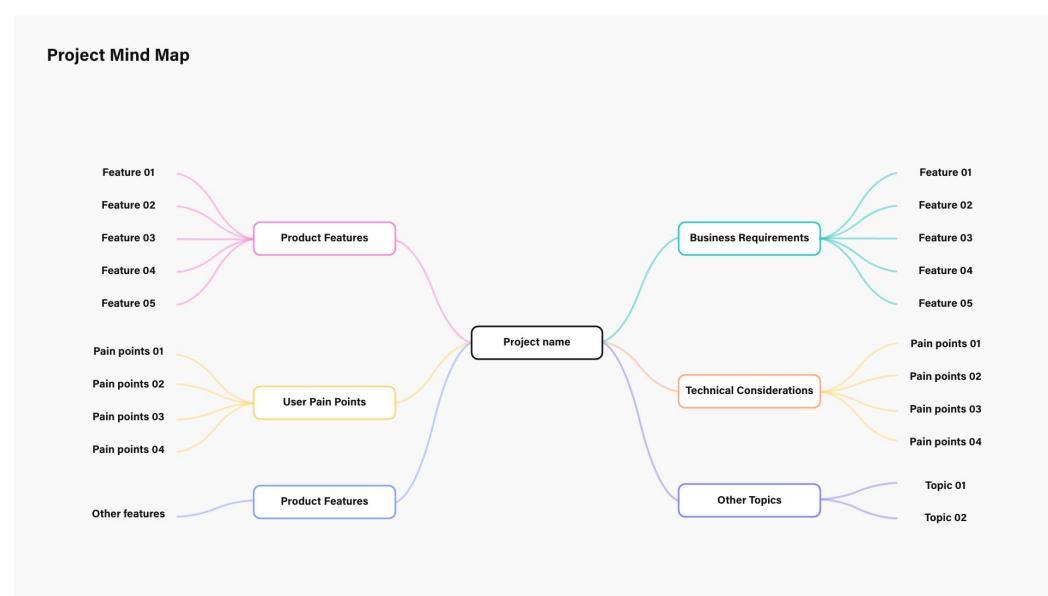
If there are no items to resolve, and/or question is managed by the Live Brief.

You can have a quick status update on slack instead.

Project Execution

This is a simple tool to define a scope for products and features. If some doubts or things are not clear and must be addresses book a meeting and using this tool, we will brainstorm a potential solution.

Project Mind Map

Project Debrief

At the end of all Client project, we must do a retrospective analysis to sustain our continuous improvement.

This is an honest collection of feedback and self-analysis to prepare us for the next project.

Retrospective (end of the project)

Retrospectives are a dedicated time after a design sprint or project to come together improve your team's process.

🟡 **What Went Well**	🔵 **What Didn't Go Well**	🩷 **Areas for Improvement**	🟠 **Actions Items**
Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..
Write a note here..	Write a note here..	Write a note here..	Write a note here..
	Write a note here..	Write a note here..	Write a note here..

Key Takeaways

- We are addressing and existing problem
- Introducing a Lean Project Management framework
- Will start with me doing all and then slowly move to a more self manage approach

Questions