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COURSE 1 : Foundations of Project Management

Week 1 : Embarking On a Career in Project Management

Learning Objectives

- Relate the skills and responsibilities of a project manager necessary to achieve success on the job.
- Define project management and describe what constitutes a project.
- Explain project management roles and responsibilities across a variety of industries.
- Detail and relate project management skills to project management and its value to business.
- Determine how this program will help prepare you for a career in project management.
- Explain the Project Management certificate program structure and course functionality.

1.1 Getting Started with The Program

1.1.1 Welcome to the Google Project Management Certificate

- Project management is the application of knowledge, skills, tools, and techniques to meet the project requirements and achieve the desired outcome.
- This program includes six industry-relevant courses that focus on topics like project management fundamentals; goals, objectives, and deliverables; risk management; team dynamics; project management methodologies; data-driven decision making; and more.
- Project methodologies : Agile, Scrum, and Waterfall
- Tools : Kanban & Asana

1.1.2 Helpful resources to get started

Here are some helpful project management resources available online:

- The [Project Management Institute](#) is the leading association for those in project, program, or portfolio management professions. Their website provides guides, industry standards, articles, templates, job boards, certifications, and more to help support professionals in these careers.
- The [Scrum Guide](#) defines Scrum, a technique used in Agile project management. You'll learn about this framework later in the program. This guide describes Scrum's roles, events, artifacts, and the rules that bind them together. You can also find hundreds of free resources to learn more about Scrum at [Scrum.org Resources](#).

1.2 Understanding The Basics of Project Management

1.2.1 What is project management?

A **project**, is a unique endeavor, and usually includes a set of unique deliverables. It's also a temporary pursuit. It has a defined beginning and an end. To put it another way, a project is a series of tasks that need to be completed to reach a desired outcome. Reaching that desired outcome takes collaboration and careful planning that keeps the project on track and on budget.

Project management is the application of knowledge, skills, tools, and techniques to meet the project requirements and achieve the desired outcome. Project management is valuable to businesses because it helps ensure that a project delivers the expected outcomes, both on time and within budget.

A real-life example of project management. Imagine a school district signs a deal with a telehealth company to make sure students don't have to miss school for simple health issues, like fevers or headaches. The deal will be completed by the end of the school year. The students can now interact with the doctor through a tablet, smartphone, or a computer, while they're at school. Implementing this technology into the school's procedures is the project. It's got a clear outcome and start and end date. So, how is that project managed? Well, this project has several tasks, and each one has to be carefully planned out and tracked, or managed, in order for the project to be completed. For example, to start you can organize training sessions for faculty to get them better acquainted with the technology, policies, and procedures. You can budget for tablets, computers, and other vital equipment to facilitate the virtual checkups. You can maintain strong communication with doctors, the telehealth company, and school staff members and so much more. To successfully launch the product in the schools all of those things need to get done.

More and more companies are starting to understand how project management can save them lots of money and time. **Poor project management** can lead to trillions of wasted dollars every year for organizations around the world. More specifically, poor project management can lead to:

- 48 percent of projects missing delivery dates
- 43 percent missing budget targets
- 31 percent failing to meet an organization's goals.

Many of Google project managers are described as "**program managers**" because they manage multiple projects for specific products, teams, or programs.

1.2.2 What does a project manager do?

Project managers usually follow a process that involves:

- planning and organizing
- managing tasks
- budgeting
- controlling costs and other factors.

Everything they do helps make sure the project can be completed on time and on budget. In broad terms, a project manager also needs to make sure that the project outcome is bringing value to the company. A project manager can add value in many different ways. Whether that's creating a new service for customers or modifying an old service so it's more tailored to the customer's needs. No matter what the task is, a successful project will always add value. And it's the project manager's job to make sure that project is both valuable and successful.

A project manager's responsibilities can vary, depending on the project, the industry, and the company they're working in. A project manager's daily responsibilities always include some version of the following:

- **planning and organizing.** An example of that might be gathering requirements from teammates or customers. This means figuring out what exactly your project's trying to accomplish. You might have a kickoff meeting or send a survey. From here you may also work on creating project plans. Creating project plans is a key part of project management. It helps set the tone of the project, keeps everyone on pace and aligned, and helps move tasks along.
- **managing tasks.** Once the project is underway, the project manager helps manage tasks for the team members and communicates key milestones to the larger team or customers. This helps keep team members, and customers updated on how the project is progressing.
- **budgeting and controlling costs and other factors.** Managing the budget and controlling costs is a common responsibility that project managers have to understand to keep the project on track and within budget. This is a full-time job because the plan you've created and managed may change causing unexpected costs to come up.

The most important thing to know about the day to day of a project manager is this: You'll use different tools, techniques and methodologies every single day. There's never a dull moment.

1.3 Learning About Careers in Project Management

1.3.1 From certificate to career success

Project managers are in high demand. In 2017, a study by the Project Management Institute found that by the year 2027, employers will need 87.7 million people filling project management-aligned roles. According to that same study, the industries with the most growth are:

- manufacturing and construction
- information services and publishing
- management and professional services
- finance and insurance
- utilities
- oil and gas

Project management plays a big part in helping all of these industries grow. In some industries, you will find the term "project manager" grouped with a more industry-specific

qualifying word. For example: "construction project manager" or "IT project manager," or "engineering project manager." Don't worry. These are all still project manager roles—they're just specific to an industry. And it's important to keep in mind that the skills you learn in one industry can be applied to another industry. New projects are popping up every single day. Across all industries, we noticed that new technology is introduced, which leads to processes changing and a need to manage those processes. So all kinds of companies need people like you who can tackle a variety of projects from start to finish, to help them navigate these changes.

The beauty of project management is that you don't need to be an expert on a focused technical topic—you just need to be able to manage projects. You could be a construction or technology project manager, or you could enter the healthcare industry and work in patient management. You could also enter the energy sector and act as an environmental project manager. The possibilities are almost endless. What's equally exciting is that you could even end up with a completely different title altogether. For instance, there are roles that entail a sequence of ongoing projects that are considered programs or operations in the industry. In this case, the role may not be described as a project manager, but instead something a little more evergreen, like "operations manager" or "program manager." Other titles that might make sense for you can include "operations assistant," "project assistant," "project coordinator," and "program assistant." When it comes to job duties, your responsibilities might change depending on the type of company you choose. For example, the workload and specific tasks at a small agency will be different from those at Google.

It's also important to keep in mind that as the world continues to change and evolve, so do industries and the job opportunities you'll find there. So be sure to cast a wide net. You'll be able to find more and more jobs you're qualified for. In addition to being qualified for project management-related jobs, there's plenty of other roles or paths that may interest you.

- ***Internships*** can sometimes be a good place to start. An internship is a short-term way to get hands-on experience in an industry. Plus, internships are a great way to help boost your resume and set yourself apart from other candidates. One of the key benefits of internships is that you get real work experience while simultaneously networking with people in that industry. It's a win-win. Now some internships in your field might not technically be project manager roles, but a lot of roles are easily transferable. For example, something like an "events manager intern" role can become a full-time project manager position later on. Internships aren't great for everyone's lifestyle, but if you can make them work, they're a fantastic option.
- ***Working for companies on a contract*** means you'll work with them on a project-by-project basis, but you won't be a full-time employee. This kind of work is a great way to get your foot in the door and build your portfolio. Plus, it gives you the flexibility to try your hand at a few different projects at once, depending on the commitment level required for that. Another benefit of contracting is that it lets you explore different kinds of companies and project types. Since it's a temporary position, you can explore what type of company is the best fit for you. Maybe you find you like working with a large or a small team, or you find you enjoy specific types of projects. And if you find a situation that suits you and the organization, your contract position might just lead to a full-time position.

1.3.2 Explore project management roles

Project management job categories and common roles

1. Introductory-level project management roles

Entry-level project management positions are a great opportunity to get your foot in the door and learn the ins and outs of how a company operates and manages projects. The lessons you learn from these experiences are extremely valuable to your growth in project management. Some entry-level project management positions include:

- **Junior Project Manager:** Performs all aspects of being a project manager alongside a more experienced professional.
- **Project Administrator:** Assists the rest of the project team with administrative tasks.
- **Project/Program Assistant:** Supports team members working on a project and offers administrative support. May perform research or create training documents along with other jobs as assigned by program leaders.
- **Project/Program Coordinator:** Participates in hands-on project work and administrative tasks. Works under a project manager to make sure projects are completed on time and within budget.
- **Project Support Specialist:** Works alongside a project manager and team members to oversee assigned projects. May also be responsible for training and developing employees to perform designated tasks.

2. Traditional project management roles

Once you have gained some experience in introductory-level positions, you can explore traditional project management roles, such as:

- **Project Manager:** Responsible for the initiating, planning, executing, monitoring, and closing of a project. Includes industry-specific titles like IT project manager, construction project manager, or engineering project manager, which utilize skills that are transferable among industries.
- **Project Analyst:** Moves a project along by sharing information, providing support through data analysis, and contributing to strategy and performance.
- **Project Leader/Director:** Drives core decision-making and sets the direction for the project. Usually knowledgeable about the product or deliverable.
- **Project Controller:** Primarily responsible for project planning. You are likely to see this job title in industries like engineering and construction.
- **Technical Project Manager:** Conducts project planning and management for identified goals within a company. Ensures that projects are completed to the requirements within a defined time frame and budget.
- **Project Management Office (PMO) Analyst:** Manages the progress of complex projects to ensure timely execution and completion.

3. Program and portfolio management roles

As you have learned, project managers are responsible for the day-to-day management of projects. They shepherd projects from start to finish and serve as a guide for their team.

Project managers must apply the right tools, techniques, and processes to complete the project successfully, on time, and within budget.

After you have carried out projects successfully and feel you are ready for a step up in responsibility, a program manager position may be the next step for you. While a project is one single-focused endeavor, a **program** is a collection of projects. Program managers are responsible for managing many projects. At Google, all project managers are called program managers because they manage multiple projects simultaneously.

Successfully implementing programs as a program manager can eventually make you a great fit for more senior positions, such as a senior program manager or a portfolio manager. A **portfolio** is a collection of projects and programs across an entire organization. Portfolio managers are responsible for portfolios of projects or programs for one client. Over the course of your career, you might progress from project manager to program manager to portfolio manager roles.

While project, program, and portfolio managers hold different types and levels of responsibility, they are all project managers. In Course 4 of this certificate program, you will learn more about differentiating projects, programs, and portfolios.

- **Program managers:** Manage a group of projects that are related or similar to one another and handle the coordination of these projects. They facilitate effective communication between individual project managers and provide support where necessary. They also help create and manage long-term goals for their organization.
- **Portfolio managers:** Responsible for managing a group of related programs within the same organization. They coordinate various programs in order to ensure they are on track and that the organization is meeting its strategic initiatives. Portfolio managers look at all projects and programs within the organization and prioritize work as necessary.

4. Operational management roles

In operational management roles, you will get the opportunity to experience several different departments and how they interact and operate. Operational management roles allow you to work alongside peers and management from various business segments, giving you an appreciation for what each segment does on a daily basis. Key elements of project management include making sure a project is on budget and on schedule. This course, and your experience as a project manager, will give you the tools to be able to apply those skills to running a business. Some operational management positions include:

- **Operations Analyst:** Manages and coordinates research, investigates workflows, creates business procedures, and recommends changes to improve the project and company.
- **Operations Manager:** Oversees strategic decision-making and rolls out plans of action based on financial, schedule, and resource reporting.
- **Chief Operating Officer:** Responsible for overseeing the day-to-day administrative and operational functions of a business.

5. Agile roles

We will discuss the Agile project management approach in depth later, but here are a couple of the positions you may see that are related to that approach:

- **Scrum Master:** Coordinates and guides the Scrum team. Knowledgeable in Agile framework and Scrum and is able to teach others about the Scrum values and principles. May also be listed as a Technical Program Manager or Technical Project Manager.
- **Product Owner:** Drives the direction of product development and progress.

6. Industry-specific management roles

As you search for project management roles, you may see positions with titles like “engineering project manager” or “construction project manager.” Keep in mind that the skills you learn in one industry can be applied to another industry. For example, you may have experience as a software engineer but are interested in pursuing a career in project management. You will be able to apply what you’ve learned working in a technical field, as well as with the skills you have picked up in this certification course, to a project manager position in multiple industries. Having experience working on a team to achieve a task and understanding how to execute an effort on schedule and on budget are aspects of your professional experience—combined with your project management knowledge—that make it possible for you to move between industries.

Key takeaway

Project management is a career path with a great deal of potential!

With each step along your career path, you are building yourself up to be a significant contributor to any company. We have discussed a number of possible job titles for you to search for when you start exploring project management roles. Regardless of the industry in which you currently work, you have gained **transferable skills**. Transferable skills are abilities that can be used in many different jobs and career paths. Your transferable skills can likely be utilized in project management roles in many other industries.

1.3.3 Finding the perfect roles

Networking is when you meet other people in a professional setting with the goal of learning, sharing knowledge, and creating new business connections. This plays a big role in job hunting, so it is a great tool to start learning and perfecting. The skills you learn here will prepare you for all kinds of project management jobs. Knowing how to search for jobs will make it even easier to match those skills with the best opportunities for you.

1.3.4 Using buzzwords and skills in your job search

In an earlier video, we mentioned **buzzwords**—words or phrases that are popular for a period of time or in a particular industry. In today’s job market, buzzwords like data-driven, team player, and self-starter are common. You may see terms like these show up throughout your searches.

Similarly, many job descriptions list the specific skills they require candidates to have. These skills can become some of the terms that you use in your job search. Examples of these skills include:

- **Coordination**, or getting people and teams to work together. You may see responsibilities in job descriptions such as “coordination of efforts to achieve project deliverable” or “coordinate internal resources to ensure successful project completion.” Being a project manager is essentially managing the coordination of resources to achieve your end goal. Coordination is one of the top skills a project manager should have, so searching for this term can lead you to appropriate positions.
- **Organization**, or the ability to stay focused on different tasks. You may come across phrases like “solid organizational skills, including attention to detail and multitasking skills” or something as simple as “highly organized.” Organization is key to being a great project manager. We will discuss many ways to sharpen this skill in the upcoming lessons.
- **Leadership**, or being able to lead a group of people. You may see phrases like “strong leadership qualities” or “ability to lead” in job descriptions. A project manager needs to display leadership in a number of ways, including effective planning, efficient task coordination, inspiring team members, and key decision-making. You are working on many of the skills needed to become a great leader in this program!

Take a look at the skills required for this position. The job description lists each of the terms that we talked about or a variation of these terms.

Project Manager
<ul style="list-style-type: none">● Excellent time management, prioritization, and organizational skills● Demonstrated ability to lead others● Outstanding communication skills● Successful track record in coordinating the work of internal and external teams to develop new products

You may also come across positions in your search that do not include the title “Project Manager” or any of the job titles we previously discussed, but you shouldn’t rule these positions out. In many cases, the job description will include project management experience and expectations, but the position may be called something else entirely.

Operations Associate
<ul style="list-style-type: none">● Plan and organize team objectives and priorities● Develop and execute reporting and process design● Monitor daily operations and enhance processes to maximize efficiency● Coordinate training plans

Look at some of the job responsibilities required for a position titled “Operations Associate.” This position is a type of project manager. You will find that most project management-related job descriptions call for the **ability to plan, organize, monitor, and execute tasks**—all skills you will be able to do once you complete this certification.

Including buzzwords and skills in your job search can help you find jobs that are ideal for you and your skill set. Once you have found a position you want to apply for, listing buzzwords and skills that are relevant to the position can also help recruiters and hiring managers identify you as a qualified and knowledgeable candidate.

Some common project management-related buzzwords and skills you could include on your resume are:

- Analytical
- Assertive
- Assessing outcomes
- Assessing progress
- Attention to detail
- Conflict resolution
- Collaborative
- Coordination
- Communication
- Development
- Evaluation
- Executing plans
- Financial analysis
- Impact assessment
- Leadership engagement
- Managing meetings
- Managing client expectations
- Managing conflicts
- Managing relationships with stakeholders
- Managing vendors
- Meeting deadlines
- Monitoring
- Multitasking
- Planning
- Prioritizing
- Problem-solving
- Process development
- Process improvement
- Project coordination
- Project implementation
- Project initialization
- Project planning
- Project reporting
- Quality control
- Risk assessment
- Risk management
- Solution development
- Strategic planning
- Strong interpersonal skills
- Strong verbal communication
- Strong written communication

Key takeaway

Job searching for your first (or next) project management position can be easier if you enter the right search terms. Search for the skills you’re learning throughout this project management certificate program or skills you’ve acquired in your current or previous positions. These terms will help you determine if you have found a potential match. As you start your project management career, don’t let the requirement for project management experience stop you from applying for project management-adjacent roles. Once you have completed this certification course, you’ll see how many skills you already have that can be translated and correlated to a project management role.

Test your knowledge: Learning about careers in project management

1. When you review a job listing, which section offers the most insight when deciding if the role is well-suited for you?

- Job description
- Job benefits
- Job location
- Job salary



Correct

The job description indicates that the job matches your skill set and experience.

2. Which of the following might be part of a job description for an entry-level project manager role?

- Our leadership team is currently looking for a Senior Project Manager to support our clients in the Life Sciences and Industrial sectors.
- Our company is seeking a Program Manager with experience managing a team in the Agile framework.
- Our North Coast branch needs a new Junior Project Manager who can channel drive and enthusiasm. You'll be front and center, hands-on, and contributing your creative energy to high-impact projects.
- Our business group is hiring an experienced project management professional who has a broad understanding of solutions and industry best practices.



Correct

The term "Junior" typically refers to a newer role that requires less project management experience.

3. Which of the following best exemplifies the progression of a project management career?

- Project manager to program manager to portfolio manager
- Program manager to project manager to portfolio manager
- Project manager to portfolio manager to program manager



Correct

While you may encounter a different title progression in your career, this is a typical progression. All project managers lead projects from start to finish and serve as guides for their team. However, program managers are responsible for managing many projects at the same time, and portfolio managers are responsible for portfolios of projects or programs for one client.

4. What three types of information can be helpful to include in your search for project management roles? Select the three options that apply:

Essential project management skills like coordination, organization, and leadership

 **Correct**

Using skills that are essential for all project managers in your job search can help you find both project management and project management-related roles, even if those roles do not include “project manager” in the title.

Skills you've acquired in your current or previous position

 **Correct**

Including skills you've previously acquired in your job search can help you find jobs that match your experience.

Training you may gain later in your project management career

Common project management-related buzzwords like “process improvement” and “risk management”

 **Correct**

Using common project management buzzwords in your job search can help you find both project management and project management-related roles, even if those roles do not include “project manager” in the title.

Weekly Challenge 1

1. Fill in the blank: In addition to a job title, many companies list project management as a desired _____.

- internship
- skill
- hobby
- degree

 **Correct**

2. What did researchers project in 2020 for job growth in the project management field?

- Project management talent is in high demand in a few countries.
- Project management aligned roles will need nearly 90 million people to fill positions by the year 2027.
- Project management talent is only in high demand in large American cities.
- Project managers cannot succeed without a PM certification.

 **Correct**

3. As someone new to the field of project management, you decide to take a contract position with a firm. What should you expect from this type of role?

- You won't be able to work on projects with other firms.
- You will be a full-time employee with the firm.
- You'll work with the firm on a project-by-project basis.
- You won't be able to mention this work in your portfolio.

 **Correct**

4. As a project manager for a large school district, you are implementing a new telehealth technology that allows students to have virtual health checkups without having to miss school. To start, you organize training sessions for faculty to get them better acquainted with the technology, policies, and procedures for using the new telehealth option. What common project management responsibility is this an example of?

- Managing tasks
- Managing company operations
- Planning and organizing
- Controlling costs

 **Correct**

5. Your colleague is managing three different projects that involve implementing a new set of processes in your company's HR department. Which of the following best describes your colleague's role at your company?

- Project management
- Portfolio management
- Program management
- HR management

 **Correct**

6. You have recently been hired as a project manager leading a team of technical writers in completing a set of user manuals for a new product launch. Which of the following abilities are you expected to demonstrate?

- Advanced writing skills
- Task management
- Technological expertise
- Interviewing and hiring

 **Correct**

Review [the video that defines project management](#).

7. As a project manager at a small construction firm, your responsibilities include managing tasks on new builds. Which of the following activities does managing tasks involve? Select all that apply.

Communicating project milestones

 **Correct**

Gathering project requirements and creating a project plan

Controlling costs

 **This should not be selected**

Please review [the video on the roles and responsibilities of a project manager](#).

Overseeing activities that team members do on a daily or weekly basis

 **Correct**

8. Fill in the blank: A project is a temporary pursuit and usually includes a set of _____.

rules for accountability

unique deliverables

team members

strategic risks

 **Correct**

9. You just finished a successful internship as a project support specialist at a large banking firm and are looking for a full-time project management job. The best project manager position listed near you is for an IT project manager. Why might you be a good candidate for this job?

Only people with IT experience can manage banking projects.

Because most IT projects are related to banking.

Because banks use information technologies.

Because project management skills learned in one industry can be applied to other industries.

 **Correct**

10. As you search for project management roles, you find a job listing for an "Executive Development Operations Associate" with a list of job responsibilities. Which of the following responsibilities tell you that this job is a project management opportunity? Select all that apply.

- Regular office hours at corporate training center
- Coordinate executive training plans

 **Correct**

- Travel up to twelve weeks a year
- Plan and organize team objectives and priorities

 **Correct**

Week 2 : Becoming an Effective Project Manager

Learning Objectives

- Detail the core skills to be a successful project manager.
- Describe the role and day-to-day responsibilities of a project manager.
- Discuss when and why it is necessary to have a project manager.

2.1 Exploring How A Project Manager Adds Value

2.1.1 The value of a project manager

Project managers shepherd projects from start to finish and serve as guides for their team, using their impeccable organizational and interpersonal skills every step of the way.

Project managers usually follow a process that involves planning and organizing, managing tasks, budgeting, and controlling costs so that the project can be completed within the approved timeframe. Project managers play a crucial role in their organizations. Project managers add value to their teams and organizations in key ways that include prioritization, delegation, and effective communication.

1. Prioritization

Project managers add value to their teams and organizations through effective prioritization of tasks required to complete a project. They're experts at helping team members identify and break down large tasks into smaller steps. There'll be times when a project manager may not know which task to prioritize. To determine which ones are the most critical to the success of the project, they'll connect with their teams and with stakeholders to gather information and make a plan. **Stakeholders** are people who are interested in and affected by the project's completion and success, like the leader of an organization.

2. Delegation

Project managers use delegation to add value to their teams and organizations by matching tasks to individuals who can best complete the work. By delegating this task to the person with the right skills to complete the work and ordering the task appropriately, you're applying knowledge of your team's strengths to the planning of your project.

3. Effective Communication

Project managers deliver value through effective communication, both with their team and with key stakeholders. This refers to being transparent, which means being up front with plans and ideas and making information readily available. Project managers keep in regular contact with their team about the progress of the work and help identify areas where a teammate may need support. In addition to keeping up with teammates, project managers keep in regular contact with people outside of the team, like company leaders who are invested in the project outcomes.

2.1.2 How project managers impact organizations

You have learned that project managers can prioritize, delegate, and effectively communicate to deliver value to their projects. This reading will focus on the main ways that project managers can add value to projects and impact organizations, which include:

1. Focusing on the customer

Customers are always a key element to success in any business. There is no exception to that in the field of project management. In project management, the word “customer” refers to a person or an organization that defines the requirements of the project and sets important guidelines, such as budget and deadlines. In projects, customers can be internal or external. Internal customers are stakeholders within your organization, such as management, project team members, resource managers, and other organizational departments. External customers are customers outside of your organization, such as clients, contractors, suppliers, and consumers.

To successfully deliver a project, it has to meet the customer's standards. To meet the customer's standards, you have to make sure you clearly understand their expectations. The customer is at the center of a successful project. Project managers can add a lot of value to the project by building relationships with customers and taking the time to make sure the customer is heard and satisfied with the result.

Asking the customer questions

Let's discuss how you can focus on the customer in a project. First, sit with the customer and ask what problem they are trying to solve. You might ask if they have a specific vision of the final outcome they would like delivered. Sometimes, customers will lean on project managers to find the solution to their problem. It's your job to ask questions like:

- What is the problem you would like us to help solve? Example response: The customer wants help developing a new process that would allow their company to be more efficient.
- How is the problem impacting your organization? Example response: The customer states that they are losing clients because of their current inefficient processes since clients are sometimes receiving their orders late.
- What prompted you to ask for help now? Example response: The customer says that they may lose department funding if they do not improve efficiency.
- What is your hope for the outcome of this project? Example response: The customer states that their ultimate goal is to increase the speed at which they fill orders without sacrificing quality.

Taking the time to dig a little deeper into the “why” behind the project can help a project manager better support and understand the customer. The more you understand the customer's goals, the more likely you will be able to produce what the customer is seeking.

2. Building a great team

The team is a project's biggest asset. A successful project manager knows that and takes the time to understand each person's motivations, strengths, and weaknesses. Project managers add value to the project by identifying the right team for the project and enabling the team to be successful and make decisions.

When you work to build a great team, you have to consider the skills needed for the project, as well as the resources available. Understanding the customer's requirements helps shape the skills needed for your team. If you are working on a project that requires people with medical expertise and you hire people who do not have a medical background, no matter how hard that team works, they will not have the right skill set to complete the project. As project manager, you should bring on people with the right skills and ensure the team knows that each individual is valued, trusted, and appreciated. You can demonstrate how you feel about the team's value by allowing them to have input and ask questions, and by addressing their needs as soon as possible.

3. Fostering relationships and communication

Maintaining customer satisfaction and building a great team are two ways that you, as a project manager, can add value to a project. Both of these skills are built on the foundation of relationships and communication. The project managers who add the most value are the ones who take the time to build relationships, communicate, and treat others with consideration and respect.

Project managers can set the tone for a project and build relationships within their teams and with stakeholders. Taking the time to check in daily with your team, see how they're doing, and ask if there is anything they need help with can go a long way towards making them feel valued and heard.

4. Managing the project

When you build teams, each person is generally assigned specific project tasks. Once each task is done, the person responsible for that task hands that part of the project over to the next person. Your team members don't always see the whole picture and how they impact others in a project. A successful project manager sees the impacts of each process within the project and communicates those impacts to the team. This ensures that everyone working on the project understands their task goal as well as the big picture goal for the finished product. For example, if a graphic designer working on marketing materials for your project doesn't understand the customer's overall goal to appeal to educators, they may not be able to fully capture the vision for the campaign. Helping this team member understand the big picture allows them to tailor their tasks to meet the needs of the project end goal.

Managing a project can be busy, but if you take the time to build relationships and maintain open lines of communication, you will increase the chances of the project's success as well as the customer's and your team members' satisfaction.

5. Breaking down barriers

Sometimes, when you ask why something is being done a certain way, the response you get is, “Because we’ve always done it this way.” A project manager adds value to a project when they break down barriers, allow their team to innovate new ways to do things, and empower them to share ideas. As a project manager, you have to model ingenuity and collaboration, and encourage your team to do the same.

How can you break down barriers on a project? You can provide support for your team as they try new approaches to find solutions, and you can advocate for additional resources for your team. If your team is having a hard time getting an answer from another organization, you can reach out to the organization yourself in order to keep the team on track and on schedule.

Key takeaway

You have now learned some of the ways that project managers can add value to projects and impact organizations. By focusing on the customer, building a great project team, fostering relationships and communication, managing the project, and breaking down barriers, you can overcome obstacles and find solutions to succeed.

2.2 Learning More About Project Manager Roles and Responsibilities

2.2.1 Key project managers roles and responsibilities

Planning and organizing

One responsibility that falls under the umbrella of planning and organizing is making use of productivity tools and creating processes. During the planning and execution of a project, you might need to use certain tools and develop processes to improve information sharing across the team; you may also need to create plans, timelines, schedules, and other forms of documentation to track project completion, and you’ll usually need to maintain those documents throughout the entirety of the project.

Budgeting and Controlling costs and other factors

As the project is underway, changes to the plan and budget are bound to come up. Believe me. This will require you to monitor and manage the budget, track issues and risks as they arise, and manage quality by mitigating those issues and risks. One way to do this is by removing unforeseen barriers that come up. Now, by barriers, we mean things that can get in the way of project progress. For example, if your teammates lack the resources needed to complete a task, you might identify that issue, or barrier upfront, escalate the issue to a stakeholder, and work to secure the resource so your team can move forward.

Managing tasks

A project task is an activity that needs to be accomplished within a set period of time by you, your team, or your stakeholders. Keeping track of tasks is a great way to help manage the team's workload and ensure that things are getting done. Keeping track of tasks is also a great tool for demonstrating progress to people outside the immediate team, like your stakeholders.

2.2.2 Identify: Project opportunities and tasks

As project manager for an arts education center, you join a planning meeting for the upcoming quarter. Team members will discuss top priorities, and you'll identify a project and related tasks to achieve these goals.

Follow the conversation by reviewing what each stakeholder has to say. Once you reach the end, identify the correct project or task discussed by selecting it from the list.

Planning conversation

The diagram illustrates a planning conversation between two stakeholders. It features two circular avatars: one for Sarmira, a woman with dark curly hair wearing a yellow top, and one for Zoe, a person with short brown hair wearing a dark turtleneck. The conversation is structured as a back-and-forth exchange. Sarmira initiates the discussion by stating that everyone was able to make it, noting it's been a big year with positive feedback on their classroom outreach program. She then asks about live-streaming or recording classes in advance. Zoe responds by mentioning online education as a priority, stating that putting more classes online reaches more students. The conversation ends with a question from Sarmira about live-streaming or recording classes in advance.

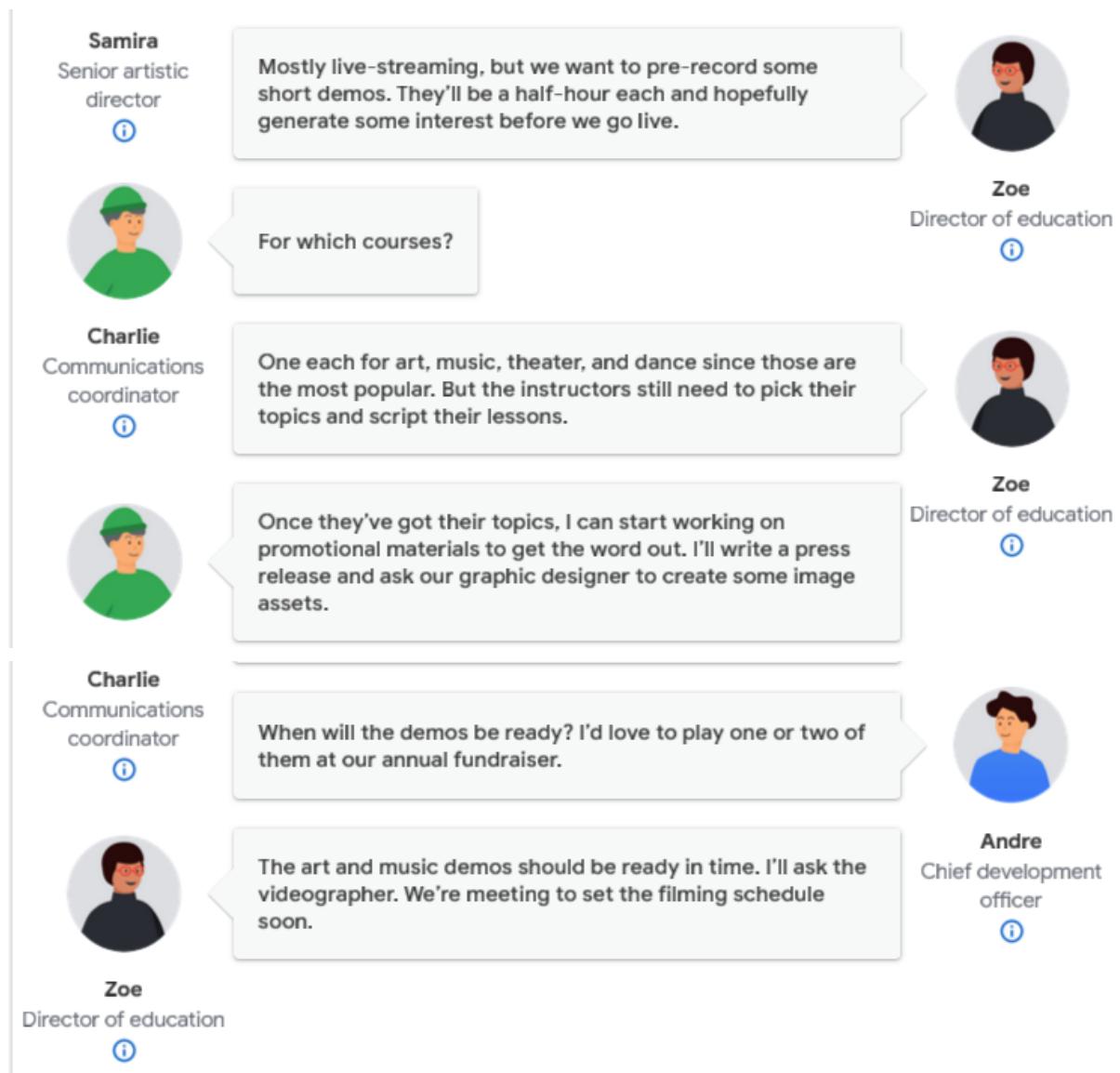
Sarmira
Senior artistic director

I'm glad everyone was able to make it. It's been a big year for us so far—we've had a lot of positive feedback on our classroom outreach program. So, let's discuss priorities for the upcoming quarter.

Zoe
Director of education

Online education is the big one for us. The more classes we put online, the more students we can reach.

Are you thinking of live-streaming the classes or recording them in advance?



Select the first task

- Shift the organization's business model to prioritize virtual learning over in-person classes
- Plan a fundraiser to raise money for the organization
- Create online course offerings to expand the organization's reach within the community

What's the next task?

- Survey students for topics to record as demos
- Ask instructors to select topics for recorded demos
- Provide instructors with scripts for their demos

<p>What should happen next?</p> <p>Provide advance payment to instructors for recording <input type="radio"/></p> <p>Request filming schedule from instructors <input type="radio"/></p> <p>Ask instructors to script their demo lessons <input checked="" type="radio"/></p>	<p>What should happen next?</p> <p>Find an instructor for a pottery course <input type="radio"/></p> <p>Director of education sets schedule with the videographer <input checked="" type="radio"/></p> <p>Contact instructors about live-streaming their demos <input type="radio"/></p>
<p>Select the final task</p> <p>Communications coordinator writes a press release <input checked="" type="radio"/></p> <p>Chief development officer decides on social channels for promotion <input type="radio"/></p> <p>Communications coordinator reviews course scripts <input type="radio"/></p>	

2.2.3 Responsibilities that utilize interpersonal skills

What are the core job responsibilities of project managers? Let's recap what we learned in the previous video.

The project manager is responsible for planning, organizing, managing tasks, budgeting, controlling costs, and other factors to help keep the project within budget and on time.

What does that mean? Basically, as the project manager, you will be responsible for tracking the day-to-day details of the project, but you will also have an opportunity to step back and see the bigger picture of the overall project.

Depending on the project and organization, you may also have responsibilities that utilize your interpersonal skills. **Interpersonal skills** are the behaviors you use to interact with others, such as communication, active listening, and leadership.

Let's review these responsibilities.



Teaching and mentoring

As a project manager, you can serve as a mentor to your team. When you take the time to fully explain the expectations, you eliminate rework, confusion, and frustration. Mentoring and teaching others the lessons that you, as a project manager, have learned allows your team to make better choices and build on your experience. Mentoring also involves supporting each individual on your team in meeting expectations and helping them to exceed their own sense of personal potential.

Building relationships

Relationships are everything! Getting to know your team members lets them know that you care about them as people, not just as employees. Taking the time to build relationships with your customers, clients, vendors, and other stakeholders is equally important. Dedicate time to check in with people. Pay attention to the insights they offer you about their work style since their actions can inform how to most effectively interact with them. Ask about their lives beyond the project, and then follow up on those discussions later on to show your interest. When you foster these relationships, you are all more invested in the success of your project.

Controlling change

The American novelist Louis L'Amour wrote, "The only thing that never changes is that everything changes." This applies to projects as well. Projects change as you continue to understand the expectations and the needs of your stakeholders. As a project manager, you need to remain flexible and adjust to the stakeholders' needs. However, it is also important to protect your team from constant change and rework. A good way to do this is by

documenting the initial expectations of the project and clearly identifying the changes being requested. It is also helpful to understand the budget and schedule impact of the changes and make sure that the stakeholders understand those impacts. As the project manager, you are responsible for protecting your team.

Empowering your team

We all enjoy being heard and appreciated in our careers. Giving your team the ability to work directly with the stakeholders and their teams lets them know that you trust and believe in their skills! One of the best things about empowering your team is getting fresh ideas and passionate employees willing to help find solutions to problems. Another way you can empower your team is by delegating responsibilities to them, allowing them to make some decisions for the project, and using their input in the planning and execution of the project. Effective mentoring often leads to more empowered teams.

Communicating status and concerns

As a project manager, communication is everything. With effective communication, you can work together with your team to find solutions to challenges. The project manager sets the tone for the project. Maintaining an open door policy and building trust within your team and among stakeholders—all while staying positive—will help the success of the project.

Key takeaway

You have learned that project managers may be responsible for teaching and mentoring project team members, building relationships with the team and various stakeholders, controlling change and the impact to the project, empowering team members to make decisions, and communicating status and potential concerns. These interpersonal responsibilities can be just as important to the success of your projects as your more concrete responsibilities, like scheduling and budgeting.

As you continue through this course, you will learn more about how these project manager responsibilities are embedded into the different phases of a project.

2.2.4 A project manager's role within a team

Earlier you learned more about the responsibilities of a project manager. And while it might seem like a lot to keep track of, it's important to know that you, as the project manager won't need to do everything on your own.

Let's discuss the role of the project manager and how that role relates to other roles within the project team. It's easier to hear the term manager and immediately think of your boss. But a project manager is not often the direct manager of the people working on a project team. Here, we're discussing the project manager as someone who manages the tasks of a project. But what does that really mean, right? Well, although you might have a few teammates working with you on a project, you're probably not their day-to-day boss. With the help of your team, you can get a lot more done together. Everyone on your team will have their own set of roles and responsibilities. And you'll come together to ensure that everyone is able to do their part to advance the project. Each person will be an expert on their portion

of the project, but no one will be an expert on every aspect of the project, and honestly, neither will you. For instance, the graphic designer will focus on graphic design, but probably won't be an expert on copywriting. Similarly, you'll be an expert on project management, but may not be an expert on marketing.

Here's another way to think about it. Here's another way to think about it. Imagine that you're organizing a camping trip. You might be the person in charge of planning the trip, but that doesn't mean you have to be a camping expert. Maybe you've never been camping before, but your partner grew up spending every summer by the campfire. In that case, you might assign them the task of picking out the right number and style of tents for your group. So, in this example, you are planning the trip by giving your partner the job of finding the right number of tents and the right size tents to make sure everyone is covered. You aren't doing the research or the task yourself, but you're making sure that things are getting done. It's similar in the workplace. As the project manager, you won't be an expert in every project role, and that's okay.

As we said, your job isn't to be the expert on everything. Instead you're responsible for guiding your team and making sure that they have the support that they need in order to complete the project. So how does a project manager go about doing that? Let's discuss using a few more examples of the required responsibilities you might find in a job listing.

- **hold all team members accountable for their assigned tasks.** Managing tasks will help you hold your team members accountable by giving them ownership over specific pieces of the project.
- **ensure that issues and risks are tracked and visible, and be able to establish escalation paths.** Now by escalation paths, I mean that you should know how you will communicate risks to the right people at the right time.
- **understand and help teammates adopt the right workflows and project management styles.** As the project manager, you'll likely have the best idea of which style is best for the work. It's your job to ensure that the team adheres to that style and the other systems in place.
- **collaborate with other teams at the organization to meet the requirements based on project, scope, schedule, and budget.** In other words, a project may affect not only your team, but other teams at an organization, as well as, say, the marketing or the finance team. So you'll need to work with those teams to ensure that everyone is happy with the project outcomes.

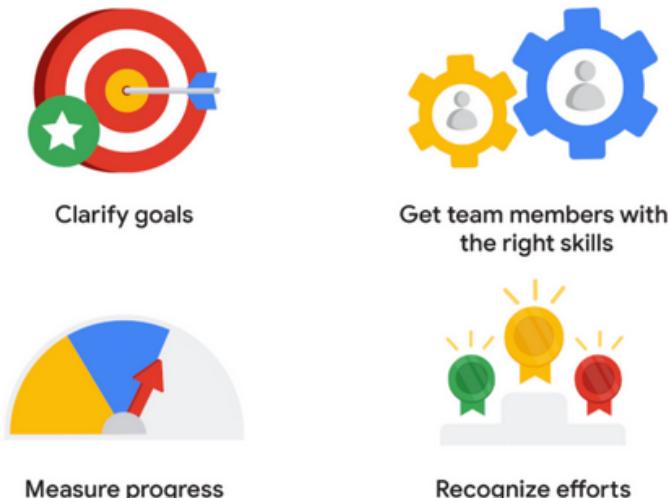
2.2.5 Working with cross-functional teams

As a project manager, you will likely work with **cross-functional teams**. A cross-functional team includes team members who have different backgrounds, types of expertise, and job functions. Even though these team members have different skill sets, occupy different roles, and may even work in different departments, they are all working towards a common goal: the successful completion of your project.

Sometimes the members of a cross-functional team are referred to as "T-shaped professionals." They are skilled in how to collaborate and innovate with those in different job functions and across different departments, but they also contribute their own specific areas

of expertise. Each member of a cross-functional team has their own unique perspective and experience, bringing different ideas and strategies to the project.

Managing cross-functional teams effectively requires the project manager to:



Let's explore each of these ideas in more detail.

Clarify goals

When working with cross-functional teams, it is important to ensure that each member of the team understands their role, how they support each other, and the common goals of the project. It is vital to set clear goals for the team and make sure that the team understands those goals. Be direct and concise, avoiding extraneous details and explanations. When communicating task or project goals, make sure you define key items, such as budget, deadlines, quality requirements, or important resources. Ensure your team members understand task and project goals by encouraging them to ask questions and clarify information. It will be up to you to continuously check in with your team to make sure they're all moving towards their goals, staying on track, and completing quality work. Cross-functional teams may work in different departments, be in different physical locations, and have different leadership, but all team members work together with the project manager to support the current project. Your project may be competing against other priorities, so communicating clearly and often with your team—and vice versa—helps you identify any potential issues or concerns before they arise.

Get team members with the right skills

Making sure you have team members with the correct skill sets for each of the project functions is critical. If you are building an airplane and you've got five engineers but no mechanics, you are missing a key element of your cross-functional team. As the project manager, you must help ensure that your team has the right people with the right skill sets needed for the project to succeed. Later in this program, we will discuss some tools you can use to help you identify the skill sets needed to accomplish your project tasks.

Measure progress

Showing your team how much they have accomplished helps keep them motivated. Take the time to measure and communicate the project's progress across the cross-functional team. This helps everyone see the full picture and recognize their impact on the project. You can measure progress in many ways, including meeting key milestones, completing project tasks, and meeting project goals on time and within budget. Regularly communicate with your team members to check on their progress. Ask them if they anticipate being finished on time. If not, ask how you can help them succeed. Keep track of the team's progress throughout the project by documenting when tasks and goals are completed, and let your team members know if the project is on track or not. Make sure you communicate successes, delays, or issues, to the team so they know how the project is progressing. Keeping everyone informed is essential to the project's success.

Recognize efforts

Sometimes, when you work with cross-functional teams, there are certain skills that get recognized more than others. A mechanic could get accolades for coming up with the solution to a problem within the project, while the finance member who sourced the funding might be forgotten. As a project manager, it is your job to make sure that each member of your cross-functional team recognizes the value of their efforts each step of the way. You have learned the importance of building relationships with stakeholders, and building relationships with your cross-functional team members is just as important. Learning what makes your team members feel supported, giving and taking feedback, and being mindful of each individual's background, personal identifiers, and work style can help mediate some of the differences among team members.

Key takeaway

Being able to communicate clearly with team members, clarify the goals of the project, get team members with the right skills, measure team progress, and recognize team members' efforts is an important part of your role as the project manager, and is key to your project's success.

Test your knowledge: Learning about project manager roles and responsibilities

1. Fill in the blank: _____ is how a project manager makes use of productivity tools and creates processes. The project manager may need to use certain tools and processes to do tasks like create a schedule and share information.

- Managing tasks
- Budgeting and controlling costs
- Planning and organizing
- Removing unforeseen barriers



Correct
As a project manager, you will be in charge of how your team shares information and communicates progress.

2. Fill in the blank: _____ is how a project manager keeps track of the team's workload, ensures that things are getting done within a set period of time, and demonstrates progress to people outside the immediate team, like stakeholders.

- Removing unforeseen barriers
- Managing tasks
- Planning and organizing
- Budgeting and controlling costs



Correct
By managing tasks, project managers will ensure the activities to complete the project are getting done by team members.

3. Fill in the blank: _____ is how a project manager oversees the financial components of a project and mitigates project issues and risks as they come up.

- Removing unforeseen barriers
- Budgeting and controlling costs
- Managing tasks
- Planning and organizing



Correct
Project managers are in charge of overseeing the resources a team needs to complete a project and how much it will cost.

4. Fill in the blank: A cross-functional project team is a team that has _____.

- diverse skill sets and works toward a common goal
- similar skill sets and works toward individual goals
- diverse skill sets and works toward individual goals
- similar skill sets and works toward a common goal



Correct
It's helpful if your team has members with different skills and experiences. This diversity will make your team more likely to overcome multiple challenges.

2.3 Acquiring The Core Skills of a Successful Project Manager

2.3.1 The core skills of a project manager

While there are lots of different skills a project manager can bring to their role, there are four specific skill sets that we think can help a project manager be successful. Those are **enabling decision-making, communicating and escalating, flexibility, and strong organizational skills**.

The ability to **enable decision-making** on the team, or gathering decisions from the appropriate leader, is crucial to keep projects on task and achieve their goals. Lots of the day-to-day decisions within a project will likely fall to you and your teammates to discuss and agree on. You'll ensure that projects stay on schedule by gathering information from teammates and using those insights to help the team make informed decisions. You'll also make sure that those decisions are communicated to the necessary coworkers, whether that's the immediate team or company leaders. For example, you might provide relevant data or feedback to help your teammates make an informed decision between choice A and choice B.

The second skill is **communicating and escalating**. As a project manager, you'll use your communication skills in just about everything you do. This might look like documenting plans, sending emails about the status of the project, or holding a meeting to escalate risks or issues to stakeholders.

The third skill is **flexibility**. As a project manager, knowing how to be flexible when changes are needed is key. Plans definitively will change, even with careful upfront planning. For example, maybe the goals of your company change, or maybe a member of your team unexpectedly takes a new position at another company. A good project manager knows that unpredictable moments like these are almost always guaranteed.

As you learned earlier, the role of a project manager requires using a lot of different processes to keep the project on track. Having **strong organizational skills** means having the ability to organize these processes and the core elements of a project to ensure nothing

gets lost or overlooked, which trust me, can and does happen. To prevent this, you might decide to track daily tasks in a spreadsheet or send frequent status updates or reminders.

You can continue to build on these skills by becoming familiar with **industry knowledge** that applies to most project management roles. Knowledge of helpful **tools** and **templates** and familiarity with **popular project management styles like Waterfall and Agile**, can help you organize and document the project throughout its lifecycle.

2.3.2 Key competencies: Flexibility and handling ambiguity

In the previous video, we discussed the four key competencies of a project manager: **enabling decision-making, communicating and escalating, strong organizational skills**, and **flexibility**. With time and practice, you will master these skills to help you become successful in a project management role. In this reading, we'll dig deeper into why **flexibility** is essential for effective project management and how you can help your team deal with **ambiguity**.

First, let's review the other project management competencies you've learned about so far.

Enabling decision-making

You can help team members feel empowered from the start of your project by making the decision-making process collaborative. For example, state the goals of specific deliverables and elicit input from your team on how to achieve those goals. You may have an idea of how you would like certain tasks to be accomplished, but your team members may have more creative or efficient approaches. Empowering your team to express their opinions and make their own decisions allows you to focus on the overarching management tasks and prioritize them in order of importance. Additionally, when you allow team members to have a voice in decisions, it helps foster an environment of responsibility, accountability, and team closeness.

Communicating and escalating

Project management requires clearly communicating project goals and expectations, team member roles and responsibilities, and constructive feedback. Knowing how to effectively communicate and when to escalate issues to management is key to keeping you, your team, and your organization on the path to success. When escalation is required, try to approach management with both the problem and the potential solution or suggestions. This will show that you're taking initiative as a project manager.

Strong organizational skills

If you demonstrate that it is important for you, as a leader, to stay organized through efficient tracking and communications, your team will follow suit. One way to do this is by utilizing the abundance of organizational tools available, such as:

- Planning and scheduling software (templates, workflows, calendars)
- Collaboration tools (email, collaboration software, dashboards)
- Documentation (files, plans, spreadsheets)

- Quality assurance tools (evaluations, productivity trackers, reports)

You may need to experiment with different organizational approaches to determine what works best for you and your team.

Flexibility

All project managers need the ability to adapt and overcome changes and challenges. Let's further explore why flexibility is such a critical project management skill and discuss how it can help prepare your team for change, mitigate risks, and handle ambiguity.

Flexible planning

Change is inevitable, and the more flexible you are as a project manager, the more successful you will be throughout your career. These flexible planning strategies can help you manage your project during times of unpredictability:

- **Assess external constraints.** When planning your project, take external events into account, such as national holidays and team member vacations and sick leave. Leaving extra time in the schedule for these inevitable events up front can help minimize the impact to your project.
- **Plan for risks and challenges.** If you consider the risks that may occur, you may be able to find solutions for them in advance. For example, what if someone on your team gets sick or decides to quit? Are you able to replace them within the company? If not, can you hire an independent contractor? Come up with a list of people who may be able to join your team if one of your team members becomes unavailable. You can also assess risks by looking at historical data. Review your past projects and examine the challenges you faced. Then evaluate if similar challenges could occur in this project and prepare accordingly. We will discuss risk management at length later in this program.
- **Calculate “float” in your schedule.** Float, or slack, refers to the amount of time you can wait to begin a task before it impacts the project schedule and threatens the project outcome. Identifying float in your schedule can help with resource management, scheduling, and keeping your project on track. You will learn more about calculating float in a later course, when we discuss creating a critical path for your project tasks.

Handling ambiguity

Ambiguity can be a big challenge in managing projects. Project managers often face ambiguity in goals, requirements, schedules, vision, or other areas related to the project. Your team will look to you to lead during times of ambiguity and change, and flexibility is especially important during these instances. Here are some different ways to help your team deal with ambiguity:

- **Keep calm.** In uncertain times, handling ambiguity with grace and poise will help inspire the members of your team to do the same.
- **Express empathy.** As a project manager, it is important to try to understand what your team is thinking and feeling, especially during times of ambiguity. Let your team

members know that you care about the challenges they are facing and are there to support them.

- **Communicate what you know clearly.** Define the aspects of the project that are confirmed and will not change. This helps your team get a better sense of what to expect, regardless of any aspects of the project that are still unknown or changing.
- **Make decisions and stick to them.** Try not to second-guess your decisions in front of your team since this can lead to greater uncertainty. If you need to change course, clearly explain why you have chosen to do so to your team.
- **Trust the expertise of your team.** Increase clarity by having everyone on your team discuss what they already know or believe to be true about components of your project, such as what is involved in specific tasks or resources needed, based on their areas of expertise. Then, discuss what you still don't know and brainstorm ways to gather more information.

Key takeaway

As a project manager, having the flexibility and ability to handle ambiguity in a rapidly-changing business setting gives you an advantage. Mastering these competencies, along with enabling decision-making, effective communication skills, and strong organizational skills, will allow you to innovate and grow as a project manager and leader.

2.3.3 Reflection: Identify the essential skills of a project manager

In this exercise, you'll practice identifying core project management skills. Read the scenario below and try to identify the skills the project manager uses. Specifically, you can identify the skills discussed previously, and consider when the project manager:

- Enables decision-making
- Communicates and escalates
- Demonstrates flexibility
- Applies organizational skills

Scenario: Planning a Corporate Retreat

An event planning team of five is tasked with planning a corporate retreat for a business with 85 employees. This retreat involves hundreds of to-dos, a large budget, client-initiated changes, and important discussions with the client. The project manager knows there is a lot to do, and they are ready to lead the way.

Right from the beginning of the project, the project manager creates a spreadsheet to track what needs to get done in the project, and what teammates are working on. They also send status update emails twice per week to the stakeholders.

The project has a \$100,000 budget. There are many items to purchase and rent, including venue space, retreat materials, food, chairs, and tables. The project manager allows each one of their teammates up to \$3,000 in expenses, with anything over requiring an approval.

Shortly after the project begins, the client decides they want to slightly change the theme of the project to focus on the future instead of the past. The project manager has to work with

several team members to implement the changes which include graphic design, retreat materials, and signage.

Throughout the process of changing the theme of the retreat, the project manager works closely with the client by phone, email, chat, and video to ensure that the theme updates meet their expectations.

There is an award-ceremony dinner at the end of the retreat. The deadline to finish scheduling the dinner is in two days. Several crucial decisions need to be made: the menu, lighting, and presentation music. To make sure the deadline is met, the project manager has a video meeting with the client to ensure the dinner choices meet their expectations.

How did the project manager enable decision-making in the project? Write 1–3 sentences.

For instance, by giving each teammate a \$3,000 purchasing limit, the project manager enables teammates to make decisions on what to buy for the retreat. If they didn't give the team this option, then the project manager would have to make all the final purchasing decisions themselves.

How did the project manager communicate and escalate in the project? Write 1–3 sentences.

When the deadline for the celebration dinner was approaching, the project manager scheduled a meeting with the client to escalate and communicate the decisions that needed to be made. If the project manager didn't escalate these decisions, it may have gone past the deadline to order food and materials for the dinner.

How did the project manager remain flexible in the project? Write 1–3 sentences.

When the client requested to change the theme of the retreat, the project manager had to stay flexible. They worked with teammates to get the necessary changes in place quickly.

How did the project manager use strong organizational skills in the project? Write 1–3 sentences.

The project manager created a spreadsheet to track and organize the tasks for the project. They also used the tracker to assign tasks to specific team members. Sending status updates twice per week was also a way the project manager stayed organized. The status updates could also be viewed as a communication skill as well.

2.3.4 Common myths about project managers

We have talked about the skills that project managers need to be successful in their role. Now, let's debunk some of the common myths about what is needed to be an effective project manager.

Myth: You have to be an expert in the field and have a lot of technical knowledge about the project.

Reality: There are benefits to the project manager *not* having a lot of technical knowledge about a project. Rather than getting caught up in the technical details when communicating with management and stakeholders, the project manager can look at all of the different pieces that the cross-functional team is working on and assess how they each contribute to the success of the project. As a project manager, you bring on the right team members—with their differing areas of expertise—and trust them to be able to focus on the technical aspects of the project. Your job is to handle the communication, documentation, and organization necessary to get the project successfully to the finish line.

Scenario: Jamar just landed his first project management job with a construction company. He's been tasked with managing the construction of a new elementary school in his city. He isn't expected to know how to do all of the technical skills, like engineering, construction, plumbing, and electrical; he hires the right people for the job. He communicates the needs, timelines, and expectations of the project to his team members and stakeholders and helps break down any barriers to completing the project on time. Jamar helps the engineers and construction workers communicate with one another to ensure that they are all on the same page regarding the requirements. He makes sure that the materials are in place as needed for the plumbers and electricians.

The bottom line: Project managers hire the experts and help put all the pieces of the project together. Project managers don't need to be experts in every field.

Myth: Only people with a lot of experience within an organization can manage projects successfully.

Reality: It is a common misconception that anyone who has significant experience and success in an organization can manage projects there. In order to successfully manage projects in any organization, you must acquire the necessary skills, knowledge, tools, and techniques and be able to apply them. You don't necessarily need to have worked in previous roles at that organization. In taking this certification, you are learning and practicing how to be an effective project manager before taking on a position.

Scenario: Sofia is a supervisor at a large customer service call center. She has been recognized by leadership as a top performer. To reward her, management has offered her the role of project manager for the implementation of a new call center software program. It will be her job to oversee the installation, training, and implementation of the new process. Sofia tries to manage the project, but she has no idea how to create a project plan, manage the various members of her team, identify risks, or handle any of the other major project management tasks. She lets her manager know that she does not have the appropriate training to manage the project but that she would like to build those skills. Sofia's manager enrolls her in a project management training course so that she will have the necessary skills to manage projects in the future.

The bottom line: To be a successful project manager at any organization—regardless of whether you have worked there previously—it is essential to master the skills, tools, and techniques of project management.

Myth: You have to know every single detail about the project at all times.

Reality: Details matter in project execution, but as a project manager, you must also focus on the big picture and strategy for the project. What is the end goal? Do you and your team have a clear direction? If the whole team understands their objectives and has what they need to be successful in their tasks, they can work on the individual details and provide you space to supervise the overall project goals. Open lines of communication will help ensure that your team members share any possible risks to the budget or schedule with you.

Scenario: Yui is a project manager working for a clothing company. The company is developing a new line of winter sleepwear that is set to launch in late October. Yui meets with the key stakeholders to determine their goals and timeline for the project. She recruits employees from the merchandising, exports, marketing, materials, production, and quality control departments to be a part of the project team. Yui meets with her team at the start of the project to clarify the objectives for the product line and checks in with them regularly to remove any barriers and find out where they need additional support. When a team member from the materials department informs Yui that the fabric they were planning on using for a particular style of pajamas has increased in price, Yui works with the team member to find a new supplier so that the overall project budget is not impacted.

The bottom line: Your role as a project manager is to communicate with your stakeholders, clarify objectives, and set expectations. Trust your team to handle the details of each project task and communicate with you when there's an issue. Through your direct communication and strategic approach to problem-solving, you can provide solutions and help remove barriers for your team. This is where you add value!

We have just busted three project management myths! Recognizing these truths will help you be more confident and successful as you pursue your project manager career.

Test your knowledge: Acquiring the core skills of a successful project manager

1. Which of the following is true of project managers' experience? Select all that apply.

- They need to be an expert in the project's field
- They need to have a lot of experience within the organization running the project
- They need to have a lot of technical knowledge about the project
- They need to know how to manage a budget

 **Correct**

If budget management is part of operating a project, it's helpful to have this experience prior to starting. Remember, operating a personal budget is experience!

- They need to know every single detail about the project at all times
- They need to be familiar with project management tools

 **Correct**

While it's possible to learn how to use project management tools (such as a spreadsheet or digital calendar) during a project, it's helpful for project managers to understand the tools prior to starting a project.

2. Which skill should a project manager use when dealing with change and ambiguity?

- Flexibility
- Effective organizational skills
- Enabling decision-making
- Escalating risks

 **Correct**

When dealing with change and ambiguity, a project manager needs to be flexible. This skill allows them to adapt and overcome challenges.

3. Using tools such as a digital calendar and a spreadsheet to track team tasks is evidence of what project management skill?

- Flexibility
- Enabling decision-making
- Communicating and escalating
- Effective organizational skills

 **Correct**

As a project manager, you will use several processes, such as tracking daily tasks and sending frequent status updates to complete your project.

4. Which of the following flexible planning strategies can help a project manager during times of unpredictability?

Select all that apply.

- Rely on the knowledge of key stakeholders rather than trusting the expertise of team members.
- Plan for risks and challenges.



Correct

When project managers consider the risks that may occur, they may be able to find solutions for them in advance. Project managers should review past projects and examine the challenges they faced. Then they should evaluate if similar challenges could occur in this project and prepare accordingly.

- Calculate float in the schedule.



Correct

Project managers should determine the amount of float certain tasks have to help them figure out where they can change the order of tasks or juggle resources if needed.

- Assess external constraints.



Correct

Leaving extra time in the schedule for external events such as vacations and holidays can help minimize the impact to the project.

2.3.5 Leadership and team dynamics

Using your **interpersonal skills** is key to building relationships with the people involved in your project. By developing these relationships, you'll learn about the needs and concerns of the team. This will help you determine the priorities of the project and motivate your team throughout the process.

Possessing strong interpersonal skills is a huge part of **good leadership**. Even if you've never held a formal leadership position, having these skills will help you when you need to guide a team. This is called **influencing without authority**, which refers to a project manager's ability to guide teammates to complete their assigned work without acting as their direct managers. There's a few key interpersonal skills that you can use to accomplish this and guide the project outcomes, even without the authority of being your teammates' boss. These skills include **communication, negotiation, conflict mediation, and understanding motivations**.

In the context of leading a team, **communication** can include checking in with teammates to understand how they're progressing on a task and providing clear feedback on the quality of a teammate's work.

Negotiation might include working with a teammate to compromise on a new deadline when they tell you that they won't be able to complete their work on time. Now, trust me, I know this can be frustrating, but you'll need to use your negotiation skills often with your teammates and stakeholders to balance their needs and what is best for the project.

Conflict mediation is a great skill to practice and develop to ensure the project does not suffer as a result. This might involve setting up a meeting with two teammates who are struggling to agree upon the best way to handle a shared task.

Understanding motivations means getting to know your teammates and figuring out what pushes them to do their best work. Understanding motivations might also include learning how your teammates prefer to receive feedback, and how they like to receive recognition for doing a great job. You would use that individualized information to motivate and encourage each person on your team.

During job interviews for project management positions, you might be asked to discuss a time when you influenced without authority, and it's possible that you've already noticed ways that you've used these skills in your personal life without even realizing it. For example, let's say you have a coworker who's constantly late to every meeting and I mean, every meeting, while you can't force them to arrive on time, it's likely that you've thought about ways to motivate them to want to be on time. In doing so, you might have also wondered how to change the way you communicate with your coworker, to influence them to be on time. Maybe you've tried asking them to arrive 15 minutes earlier than the rest of the group or maybe you've told them how this behavior impacts the rest of the team. Both of these strategies are examples of influencing without authority, and they serve to encourage specific behavior.

Weekly Challenge 2

- As a project manager, you are careful to recognize team members' particular strengths and match them to tasks they are most capable of completing. What project management value does this represent?

- Prioritization
- Delegation
- Optimism
- Effective communication

 **Correct**

- As a project manager, you keep track of project activities so that you can demonstrate progress to your stakeholders. Which project management responsibility does this represent?

- Managing tasks
- Managing the budget
- Removing unforeseen barriers
- Utilizing productivity tools

 **Correct**

3. As a project manager, you choose the best project management methodology for your team and ensure they adhere to it throughout the project. What project management responsibility does this represent?

- Collaborate with other teams at the organization.
- Ensure that issues and risks are tracked and visible.
- Hold all team members accountable for their assigned tasks.
- Help teammates adopt the right workflows and project management styles.

 **Correct**

4. What is an example of measuring progress for a cross-functional team?

- Setting up effective tools so the team can easily work together.
- Asking team members if they anticipate being finished on time and, if not, how you can help them succeed.
- Learning what makes team members feel supported and giving positive feedback.
- Defining key items and encouraging team members to ask questions.

 **Correct**

5. You're a project manager on a team that is improving a product. You employ a variety of helpful tools and templates, along with your familiarity of popular project management styles, to help you document the project throughout its lifecycle. Which core project manager skill set are you demonstrating with these behaviors?

- Enabling decision-making
- Flexibility
- Strong organizational skills
- Communicating and escalating

 **Correct**

6. As a project manager, you learn that a teammate will be out sick for at least a week. They will be unable to complete their tasks, potentially causing the project to go past its deadline. Which work reallocation strategy can keep the project on schedule?

- Review the out-sick teammate's tasks to determine which tasks have "float" and figure out where the order of tasks can be changed or resources can be juggled.
- Get leadership to approve overtime so the teammate can catch up on work when they return.
- Have teammates work longer hours to get their tasks done and then do the out-sick teammate's tasks
- Distribute all of the out-sick teammate's tasks evenly among team members

 **Correct**

7. Suppose you have two teammates who disagree on the best way to complete a task. Which interpersonal skill can you use to help them resolve their disagreement?

- Positive attitude
- Conflict mediation
- Negotiation
- Understanding motivations

 **Correct**

8. As a project manager, you ensure that everyone working on the project understands their task goal as well as the big picture goal for the finished product. This adds value to your project in which way?

- Fostering relationships
- Managing the project
- Breaking down barriers
- Focusing on the customer

 **Correct**

9. Which of the following are examples of internal customers? Select all that apply.

- Suppliers
- Team members

 **Correct**

- Management

 **Correct**

- Organizational departments

 **Correct**

10. As a project manager, you maintain an open door policy to build trust within your team and among stakeholders. In doing this, you are utilizing interpersonal skills to fulfill what responsibility?

- Teaching and mentoring
- Communicating status and concerns
- Budgeting and controlling costs
- Controlling change

 **Correct**

11. Yui is a project manager working for a clothing company developing a new line of winter sleepwear. Which of the following is necessary for Yui to manage this project effectively?

- Yui must be able to do the things that each of her team members can do.
- Yui must directly manage her team members while they do their tasks.
- Yui must ensure team members understand their objectives and have what they need to be successful in their tasks.
- Yui must know every single detail about the project at all times.

 **Correct**

Week 3 : The Project Management Life Cycles and Methodologies

Learning Objectives

- Explain why it is important to understand and follow the life cycle of a project.
- Define and outline a project's phases and each phase's tasks.
- Compare different program management methodologies and determine which is most effective for a given project.

3.1 Understanding The Project Life Cycle

3.1.1 Exploring the phases of the project life cycle

No two projects are exactly the same, which means there are many different ways to manage them. Each project comes with its own needs and factors that impact how you'll take action and achieve your goals. There are many ways to manage projects and not always one right way to do so.

The **life cycle** is a great way to **guide your project in the right direction** so that you and your project stay on track and end up in the right place. Most project life cycles have four major phases, each with their own set of tasks and concerns. The main phases of a project are **initiate the project, make a plan, execute and complete tasks, and finally, close the project**. The exact name for each phase might change depending on the type of project or organization you work for. The general idea stays the same.

Initiate the project

Let's talk about the first phase, **initiate the project**. This is the launchpad for the entire process of your project. In this phase, you'll **define project goals and deliverables, identify the budget and resources you'll need, the people involved in your project, and any other details** that can impact the successful completion of your project. You'll **document all this information in one place to showcase the project's value**, and hopefully get approval to move forward with it. Once the project is approved, it's time to get rolling.

Make a plan

Next, you'll **make a plan** for how you will meet the goals of your project. There are all kinds of ways to plan your project, and we'll get into some **different methods and techniques** later on. Right now, the important thing to know is that for every single project, creating a plan of how you're going to meet your goals is absolutely 100 percent essential. Think about it. You can't hire a contractor to build a house without planning what it'll look like or how much you have to spend. These same considerations apply to any project that you manage. To be effective, your plan needs to include a lot of things. For example, a budget, a breakdown of all the tasks that you need to be completed, ways to communicate team roles

and responsibilities, a schedule, resources, and what to do in case your project encounters problems or needs to change.

Execute and complete the project

Once you have your plan in place, it's time to **execute and complete** those tasks. It's important to point out that your project team has the job of completing the project tasks. As a project manager, your role's a little different. While you might be in charge of completing certain tasks in the project, your primary tasks as the project manager are to **monitor progress and keep your team motivated**. You also **remove any obstacles** that might come up so that the tasks are executed well and on time.

Close the project

Finally, when all the tasks have been completed, all the resources have been accounted for and the project has crossed the finish line, it's time to **close the project**. Why is it important to close? One big reason is so **your team has a moment to celebrate all of their hard work**. Closing the project is also a chance to **evaluate how the project went**. You can make note of what worked and what didn't so you can **plan better for next time**. Even if the project was a massive success, it's helpful to take time to reflect. Closing the project is also a great way to **connect with anyone outside your team who may have had interest** in the project's goal. You can let everyone know what was completed and what you accomplished.

Once the project is finished, that's it. There's no more work to do. Other projects have different finish lines. For example, a project where you're implementing a new ordering system at a restaurant is complete after the system is set up and the employees know how it works. At that point, your goals are completed. It's time to hand over the project to another group whose job it is to provide support and make sure the system stays running on a day-to-day basis.

3.1.2 Case study: The significance of each project phase

The consequences of rushing through a project phase

It's Friday night when Jason, a project manager at a company that specializes in virtual reality software, receives an urgent call from his manager, Mateo. Mateo tells Jason that he needs a cost and timeline for a virtual reality training program for Flight Simulators, Inc., a company that does aircraft maintenance, by the end of the weekend.

Jason spends the weekend working through a proposal for Flight Simulators, Inc. He quickly throws together a proposal estimating that it will cost \$200,000 and take six weeks to develop the course. This is the standard cost and time frame for developing training on his company's platform. He sends the proposal over to Flight Simulators, Inc. so that he can meet their deadline.

When Jason walks into the office on Monday morning, Mateo tells him that he got reprimanded for not following the company's process for building out a proposal and including the engineers in the process. The engineers take a look at the information presented by Flight Simulators, Inc. and realize that the company's software won't work with their platform. It will take six months to develop their platform to meet the needs of the

organization's software and another six months to test the software and platform integration. The cost to develop and test this software will be over a million dollars.

This project has failed before it even started. There's no way to complete the request from Flight Simulators, Inc. without **impacting the budget, quality, and timeline**.

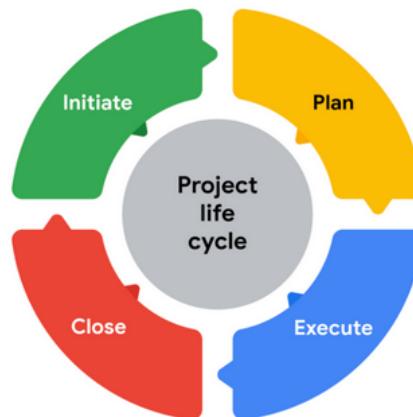
What should have happened

When his manager calls, Jason tells him that while he understands that Mateo wants to make the customer happy by getting them a proposal promptly, he would like to take a little more time to get the proposal right. Jason tells Mateo that he will draft up an email to Flight Simulators, Inc. and request additional time to develop an accurate and reasonable proposal. Mateo is hesitant but agrees.

On Monday morning, Jason sees that Flight Simulators, Inc. has responded to his request. They appreciate the fact that he communicated his concerns about the quick turnaround on the proposal request. They say they will give him a week to work with his team to provide an estimate for the project.

Now Jason has the time to get all of the key players involved in estimating the effort it will take to complete the project, including the cost, schedule, and resources.

Let's apply the project life cycle to this project.



Initiating the project

This is the phase Jason rushed through in the first scenario. Ideally, in this phase, Jason discusses project goals with Flight Simulators, Inc. to gain a clear understanding of what they are asking for. Once Jason has defined the project goals, he can gather the stakeholders and project team members to define what needs to be done to successfully create this training for Flight Simulators, Inc. Jason identifies the skill sets required, the timeline, and the cost to develop the training. He identifies and documents the value that this project creates for the company. He presents all of the information he has put together to his company's leadership team, who approves Jason's proposal. Jason then submits the proposal to Flight Simulators, Inc., and they accept it.

Making a plan

Now that Jason has the green light to work on the project, he makes a project plan to get from start to finish. Having a plan in place ensures that all team members and stakeholders are prepared to complete their tasks. Jason outlines the important deadlines and tasks for the project to be successful. He creates a schedule to account for all resources, materials, and tasks needed to complete the project.

Executing and completing tasks

During this project phase, Jason's project team puts his plan in motion by executing the work. Jason monitors his team as they complete project tasks. His role as the project manager is not to complete the individual tasks but to help break down any barriers that would slow or stop the team from completing their tasks. It is also Jason's responsibility to communicate schedule and quality expectations. Jason uses his communication skills to keep Flight Simulators, Inc. up to date on the project status and gather feedback from them. This keeps the project on schedule and within budget.

Closing the project

Jason's team has successfully completed the training, and he delivers it to Flight Simulators, Inc. They are very pleased with how it turned out! Jason is now ready to close this project and move on to the next one. Before he closes this chapter, Jason and his team discuss and document the lessons learned from the project. What worked well, and what could work better next time? Jason also puts together a small lunch gathering for his team to celebrate and recognize their hard work.

Key takeaway

It may seem like a lot of work to go through an entire project life cycle, but the long-term impact it will have on your project is huge! It is your job as the project manager to make sure that your leadership truly understands the risk of not properly preparing for a project. Making assumptions that are incorrect can put your company at risk. Instead, taking the time to carefully initiate, plan, execute, and close your project leads to project success and good working relationships with customers.

Test your knowledge: Understanding the project life cycle

1. What are some potential consequences of rushing through the initiation phase of a project? Select all that apply.

Impact to the timeline

 **Correct**

Failing to gather information from project team members to define what needs to be done at the start of the project can result in impact to the project's timeline at a later stage.

Impact to the budget

 **Correct**

If a project manager does not take the time to define the project's goals and gain a clear understanding of what the stakeholders are asking for during the initiation phase, they risk impacting the project's budget.

Impact to previous projects

Impact to quality

 **Correct**

During the initiation phase, it's important for the project manager to clearly define the project's goals and gather information from team members about what will be involved in accomplishing those goals. Otherwise, they risk impacting the project's quality.

2. Imagine that a project manager has just begun working on a project for a trucking logistics company. The customer wants to see a proposal as soon as possible, but it is taking the project manager longer than expected because he needs more input from stakeholders and the project team. What should the project manager do to turn the project into a success?

Research the cost and timeline for similar projects at other trucking logistics companies and share that information with the customer.

Tell the customer he will need four to six weeks to formulate a proposal.

Ask the customer for more time to consult with stakeholders and the project team to deliver an accurate cost and timeline proposal.

Immediately provide the customer the most recent comparable cost and timeline estimate for the work.

 **Correct**

Taking the necessary time to get input from all stakeholders and the project team is a key part of formulating an accurate proposal.

3. What are the main phases of the project life cycle? Select all that apply.

Initiate the project

 **Correct**

In the initiation phase, a project manager defines project goals and deliverables, identifies the budget, resources, and people they need, and confirms any other details that can impact the successful completion of the project.

Make a plan

 **Correct**

In the planning phase, the project manager makes a plan for how to achieve the project goals. The plan should include a budget, a breakdown of all the project tasks, ways to communicate team roles and responsibilities, a schedule, and what to do in case their project encounters problems.

Define project roles

Execute and complete tasks

 **Correct**

In the execution phase, the project team completes project tasks while the project manager monitors progress and keeps the team motivated. The project manager also removes any obstacles that come up in order to execute the tasks well and on time.

Close the project

 **Correct**

In the closing phase, the team celebrates all of their hard work and evaluates how the project went. It is also an opportunity to let everyone who had interest in the project's goal know what the team accomplished.

4. What are three benefits of closing a project? Select all that apply

- Share the team's accomplishments with people outside the team

 **Correct**

When closing a project, the project manager lets everyone who had an interest in the project's goal know what was achieved.

- Evaluate what worked and what didn't work

 **Correct**

Closing a project allows the project manager to make note of what worked and what didn't so they can plan better for the next project.

- Remove any obstacles that come up

- Celebrate the team's success

 **Correct**

Closing the project gives the team an opportunity to celebrate and be acknowledged for all of their hard work.

3.2 Analyzing The Different Project Phases

3.2.1 Phases in action: Initiating and planning

Initiate the project

- Define project goals
- Determine resources, people, and other project details
- Get project approval

The **first step** of the project life cycle is to **initiate the project**. During initiation, you'll **organize all of the information you have** available to you about your project. This way, when you're ready to continue on, you'll be prepared for the next phase when you can create your plan. **Defining project goals** makes the details of your project clear so that you and your team can successfully complete the project. For example, if the project goal is to manage a political campaign, then some deliverables, which are specific tasks or outcomes, might be to raise \$5,000 or get 500 signatures in support of your candidate's cause. With this in mind, you'll need to do some research to come up with ideas that will help you meet your goals. You'll also need to **find out what resources are available**. Resources can include **people, equipment, software programs, vendors, physical space or locations**, and more. **Anything you need to actually complete the project is considered a resource**. Now as a project manager, you'll **record all of these details in your project proposal** and then get them **approved by a decision maker** or group of decision makers at your company so that you can move ahead with your project plans. Now in some cases, you may be the

decision maker so be sure to consider the same set of factors when initiating your project before moving to the next stage.

Make a plan

- Create a budget
- Set the schedule
- Establish your team
- Determine roles and responsibilities
- Plan for risk and change
- Establish communications

Once your project is approved, you'll move into the **second step** of the project life cycle, which is to **make a plan**. In this phase, you'll **create a budget** and **set the project schedule**. You'll **establish the project team** and **determine each person's roles and responsibilities**. A crucial part of project management is **planning for risk and change**. An experienced project manager knows that plans always change. This ability to adapt is all about thinking and planning ahead. Scheduling delays, budget changes, technology and software requirements, legal issues, quality control, and access to resources are just some of the more common types of risks and changes that a project manager needs to consider. So, it's important to keep in mind that **planning is key to reducing those risks**. Once you have a plan, you'll **communicate all of this information to your team**. That way, each member will know which tasks they'll own and what to do if they have questions or if they run into problems. You'll also **communicate your plan with others who have an interest** in the project success, so that they are aware of your plans and your progress as the project continues to move forward.

3.2.2 Phases in action: Executing and closing

Execute & complete tasks

- Manage the progress
- Communicate
- Make adjustments

Your **primary job** as the project manager is to **manage the progress of the project** as a whole. This means you'll **oversee your team's efforts** and **make sure everyone understands** what's expected of them, what tasks need to be done, and how and when to complete those tasks. It's also your job to **help remove any obstacles** and to alert the right people if it looks like there might be a delay to the project. This means you'll need to **communicate with your team**, and anyone else involved in your project through meetings, written communications like memos, emails or internal chat tools, and other working documents like task reports. As your project progresses you'll **make adjustments** to the

schedule, budget, and allocation of resources, clearly communicating updates all along the way.

Close the project

- Ensure all tasks have been completed
- Confirm acceptance of the project outcome
- Reflect on lessons learned
- Communicate results with stakeholders
- Celebrate completing the project
- Formally move on from the project

When all the tasks are complete and you've **met the project goal**, it's time to **close the project**. This phase is usually overlooked because it's easy to assume that once the project goal has been delivered, everyone can move on. But hold up, there's still a lot that needs to be done. First, check to **make sure all tasks have been completed**, including any work that was added along the way. Be sure any outstanding invoices have been paid, resources are returned and accounted for, and project documentation has been submitted. Next, and this is **very important**, get **confirmation that the final outcome of your project is acceptable** to the people you're delivering it to. It is crucial to your project's success that the person who asked you to manage the project is satisfied with the end result. Once your project has been accepted as meeting its goals, **take some time to reflect** on what went well and maybe what didn't go so well. This reflection is usually called a **retrospective**, and it's a **chance to note best practices and learn how to manage your project more effectively next time**, even if everything went great. The notes from your retrospective are also valuable to the people or organization receiving the end result of the project. That's because they can use that information to inform decisions about their business the next time they consider a project. Now it's time to **collect all the project documentation** that you created or collected along the way, including all of your plans and reflections, and **share the final results of your project with your stakeholders**. Remember, **stakeholders are people who are interested in and affected by the project's completion and success**. Depending on the type of project, stakeholders could include a department or organization's management team, clients or customers of your product or service, users of your new tool or process, or even the community at large if you're planning a community town hall meeting. Next, take some time to **celebrate the effort your team invested** in the project. Celebrations help people feel good about the work they've done, and think of the work as uplifting and rewarding because it truly is. Some ideas for small celebrations are a company or team-wide email, thanking the team and acknowledging individual efforts. Now for big projects, you may even consider a company party to celebrate the team and the project success. To wrap up, you and your team can **formally move on from the project** so that you can pursue new projects in the future.

You can see how the **organization, communication, and improvements** you add to various areas of a project can **make the entire team more effective and efficient**, and you can **have an impact on many areas** of a project in a way that's greater than if you focused

on any one task on the project. Similar to a coach with a sports team, even though you aren't actually playing a direct role in the game, your guidance, your communication, and your team-building can make the difference in a happy, high-performing, and successful team.

3.2.3 Summary of the project phases

The **project life cycle** is the path for your project from start to finish. Each project phase builds toward the subsequent phase and helps to create a structure for the project. To recap, the main phases of the project life cycle are: initiating the project, making a plan, executing and completing tasks, and closing the project.

In this reading, we will summarize each phase of the project life cycle.

Initiate the project

In this phase, ask questions to help set the foundation for the project, such as:

- Who are the stakeholders?
- What are the client's or customer's goals?
- What is the purpose and mission of the project?
- What are the measurable objectives for the team?
- What is the project trying to improve?
- When does this project need to be completed?
- What skills and resources will the project require?
- What will the project cost? What are the benefits?

Make a plan

In this phase, make a plan to get your project from start to finish.

- Create a detailed project plan. What are the major milestones? What tasks or deliverables make up each milestone?
- Build out the schedule so you can properly manage the resources, budget, materials, and timeline. Here, you will create an itemized budget.

Execute the project

In this phase, put all of your hard work from the first two phases into action.

- Monitor your project team as they complete project tasks.
- Break down any barriers that would slow or stop the team from completing tasks.
- Help keep the team aware of schedule and deliverable expectations.
- Address weaknesses in your process or examine places where your team may need additional training to meet the project's goals.
- Adapt to changes in the project as they arise.

Close the project

In this phase, close out the project.

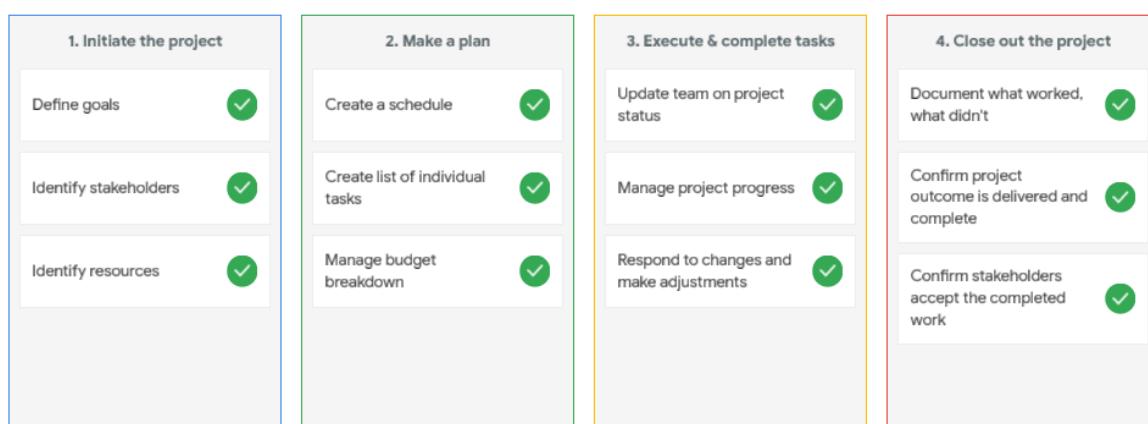
- Identify that your team has completed all of the requested outcomes.
- Release your team so they can support other projects within the company.
- Take time with your team to celebrate your successes!
- Pass off all remaining deliverables and get stakeholder approval.
- Document the lessons you and your team learned during the project.
- Reflect on ways to improve in the future.

Key takeaway

Each phase of the project life cycle has its own significance and reason for existing. By following the project life cycle, you're ensuring that you are:

- Capturing the expectations of your customer
- Setting your project up for success with a plan
- Executing project tasks and addressing any issues that arise
- Closing out your project to capture any lessons learned.

3.2.4 Identify: Phases of the project life cycle



Test your knowledge: Analyzing the different project phases

1. What is the project manager's primary job in phase three (execute and complete tasks) of the project life cycle?
- Monitor the project team as they complete tasks and break down any barriers
- Build out the project schedule to properly manage resources, budget, and timeline
- Step in to complete tasks when the team falls behind
- Document lessons the team learned during the project

Correct

The project manager's primary job is to oversee the team's efforts and make sure everyone understands what's expected of them, what tasks need to be done, and how and when to complete those tasks.

2. Phase two of the project life cycle (make a plan) includes which two of the following tasks?

- Determine the purpose and mission of the project
- Set the project schedule

 **Correct**

In the planning phase, the project manager develops the project schedule so they can properly manage the resources, budget, materials, and timeline.

- Identify milestones and tasks

 **Correct**

In the planning phase, the project manager creates a detailed project plan which includes the major milestones of the project and describes what tasks or deliverables make up each milestone.

- Break down any barriers that would slow or stop the team from completing tasks

3. During which phase of the project life cycle does a project manager hand off all remaining deliverables?

-
- Close the project
-
-

 **Correct**

A project manager hands off deliverables and gets stakeholders to sign off during the closing phase.

4. Imagine a project manager oversees their company's transition to a new financial management system. They determine that the project goal is to make the financial portal easier for employees to use. They also identify key stakeholders and outline project objectives. During which phase of the project life cycle do these activities take place?

-
-
-
- Initiate the project

 **Correct**

In the initiation phase, the project manager defines the client or customer's goal, identifies key stakeholders, and determines measurable objectives for the team.

3.3 Comparing Project Management Methodologies and Approaches

3.3.1 Introduction to project management methodologies

A **project management methodology** is a set of guiding principles and processes for owning a project through its life cycle. Project management methodologies help guide project managers throughout a project with steps to take, tasks to complete, and principles for managing the project overall.

We will talk through **two different types, linear and iterative.**

Linear

Linear means the **previous phase or task has to be completed before the next can start**. A linear approach would **work well for a project like building a house**. You'd need the blueprint created before you can begin laying the foundation. You've got to know exactly what the house will look like, its dimensions, and what type and how many resources you'll need. Then you've got to finish the foundation before you put up the walls and the walls before you put up the roof and so on before you have the finished project, which is a bungalow-style home. There's also a **clear goal**, you know exactly what the house will look like. It's unlikely that in the middle of building the house, your client is going to decide they'd rather have a multi-level Victorian instead of a single-level bungalow. What's more, even if they wanted to change, it's too late, you already laid the foundation and built the walls for the bungalow, done and done. A bungalow is what they wanted, and a bungalow is what they'll get. Using this type of linear project management approach, **completing each step in order** and **sticking to the agreed** upon specific results and being able to deliver just what the client ordered.

Iterative

For a project like **producing a new show** for a television company, on the other hand, it might be more effective to use a methodology that uses an **iterative**, more **flexible approach** where **some of the phases in tasks will overlap or happen at the same time** that other tasks are being worked on. Your team comes up with an idea for a show and films a pilot. You ran several tests of the pilot in different locations and time slots. As your team gathers feedback about the pilot, adjustments to the show are made. At the same time, you're able to make decisions and start working on other parts of the project, like hiring permanent actors, starting film production, and working on advertising even while the final version of the show is being worked on. And even though the overall goal is clear, produce a new show, the type of show could end up being different from the original idea. Your team may have started out creating a one-hour show, but during testing they realized a half-hour show would actually be more popular. Or maybe a supporting character got a lot of positive feedback, so you want to make them one of the main characters. What's more important is

that you produce a show that audiences are going to watch. Because of the iterative approach, **plans remain flexible** and you're **able to make adjustments** as you go along.

Each of these projects, benefits from a different approach to how tasks will be carried out, in order to best meet the project's goals. **Linear projects don't require many changes** during development and **have a clear sequential process**. If you stick to the plan, it's likely you'll finish your tasks within the time schedule and all other criteria. **Iterative projects** allow for more **flexibility and anticipate changes**. You're able to test out parts of the project to make sure they work before the final result is delivered, and you can deliver parts of the project as they are completed, rather than waiting for the entire project to be done.

Over the years, the field of project management has developed many different methods that project managers can choose from that will help them manage most effectively. Google takes a **hybrid approach** to project management. We **mix and match** from different methods **depending on the type of project**. Our project managers are encouraged to **adapt their own style** to what makes the most sense to their project and their team.

3.3.2 Overview of Waterfall and Agile

Two of the most popular project management methodologies are Waterfall and Agile. Each of these methods has a rich and complex history.

Waterfall

First, let's take a look at the Waterfall approach. **Waterfall** as a methodology was created in the 70s, and refers to the **sequential ordering of phases**. You complete one at a time down the line **like a waterfall** starting at the top of a mountain and traveling to the bottom. Waterfall has a **linear approach**. At first, Waterfall was used in the physical engineering disciplines like manufacturing and construction, then software emerged as an important field of engineering and Waterfall was applied to those projects as well. It still used a lot in engineering fields including product feature design and application, also known as app design. Over time, other industries like event planning and retail have adapted Waterfall phases to fit their projects.

There are now **many styles** of Waterfall, and each style has its own specific set of steps. **What they all have in common**, though, is that they **follow an ordered set of steps** that are directly linked to clearly defined expectations, resources, and goals that are not likely to change. The **phases of a Waterfall project life cycle** follow the same standard project life cycle flow that you learned about earlier : **Initiating, planning, executing, which includes managing and completing tasks, and closing**.

When would you want to **use a Waterfall approach** to project management? Well, when the **phases of the project are clearly defined** or when there are **tasks to complete before another can begin**, or when **changes to the project are very expensive** to implement once it's started. For example, if you are catering an event for a client on a very tight budget you might want to use Waterfall methodology. This way, you could confirm the number of guests first, then very clearly define the menu, get approval and agreement on the menu items and costs, order the unreturnable ingredients, and successfully feed the guests. Because the budget is limited, you can't afford to make changes or waste food. The traditional method won't allow for the client to make changes to the menu once the order has

been placed. You can also reserve tables, chairs, and dishes because you know exactly how much and what kind of food is being prepared.

A well-thought-out traditional approach to managing a project can help you reach your desired outcome with as little pain as possible during the project implementation. By spending extra effort thinking through the entire project upfront, you'll set yourself up for success. In an ideal world, **following this approach** will help you **identify the right people and tasks, plan accordingly to avoid any hiccups along the way, create room for documenting your plans and progress, and enable you to hit that goal**. However, plans don't always go according to plan. In fact, they rarely do. The Waterfall method **has some risk management practices to help avoid and deal with project changes**.

Agile

The term agile means **being able to move quickly and easily**. It also refers to **flexibility**, which means being **willing and able to change and adapt**. Projects that use an Agile approach often have **many tasks being worked on at the same time**, or in various stages of completion which makes it an **iterative approach**.

The concepts that shaped Agile methodology began to emerge in the 90s as a response to the growing demand for faster delivery of products, mainly software applications at that time. But it wasn't officially named Agile until 2001. The phases of an Agile project also **follow the project life cycle stages** we described earlier. However, rather than having to always go in order or wait for one phase to end before starting the next, **Agile project phases overlap and tasks are completed in iterations**, which in Scrum, are called **sprints**. Scrum is a form of Agile that you'll learn more about in the course focused entirely on Agile, and by sprint, we do not mean running a race as fast as possible. In this case, **sprints are short chunks of time usually one to four weeks where a team works together to focus on completing specific tasks**.

What's important to understand is that **Agile is more of a mindset than just a series of steps** or phases. It's **concerned with building an effective, collaborative team that seeks regular feedback from the client so that they can deliver the best value as quickly as possible and adjust as changes emerge**.

Projects that are **best suited for an Agile** approach are those where the **client has an idea of what they want but doesn't have a concrete picture in mind**, or they have a set of **qualities they'd like to see in the end result, but aren't as concerned with exactly what it looks like**. Another indicator that a project may **benefit from Agile** is the level of **high uncertainty and risk involved** with the project.

An example of a project that would work well with an Agile approach might be **building a website**. Your team would build the different parts of the website in sprints and deliver each part to the client as they are built. This way, the website can be launched with some parts, say the main homepage that are complete and ready for public view, while other parts, maybe the company blog or the ability to book online appointments, continue to get built out over time. This allows the team to get feedback early on about what works and what doesn't, make adjustments along the way, and reduce wasted efforts. This same website example, the Waterfall method will plan for and require the whole website to be complete before it can

launch. Having a basic understanding of Waterfall and Agile will help you figure out an effective way to organize and plan out your project.

3.3.3 Comparing Waterfall and Agile approaches

Now that you know more about some of the different approaches and frameworks associated with project management, let's compare specific aspects of **Waterfall** (also commonly called **traditional**) and **Agile** approaches.

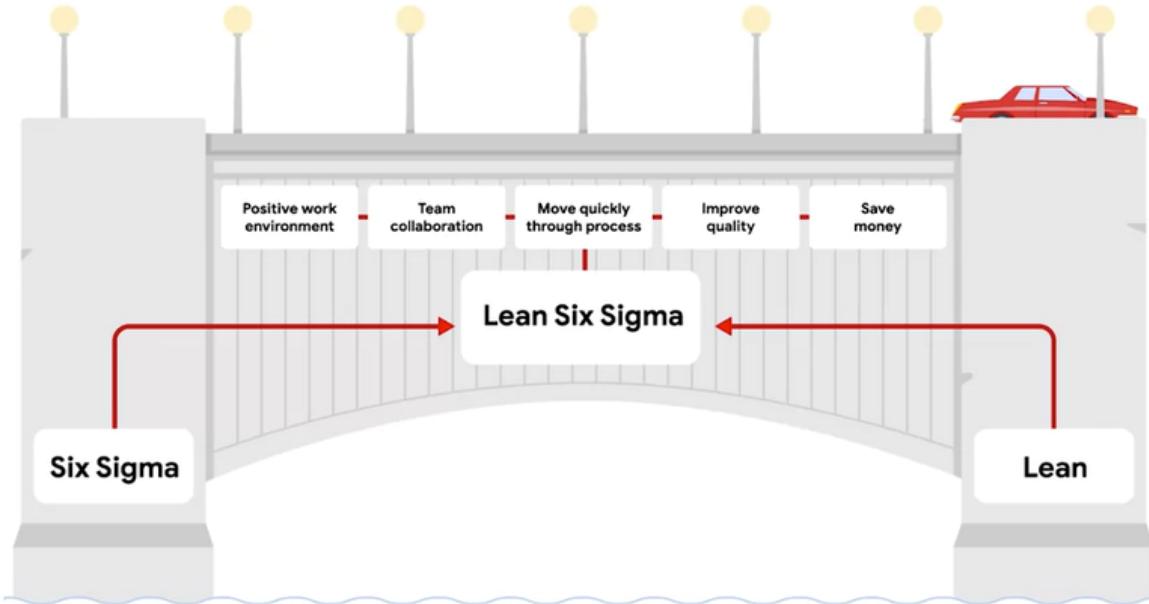
Understanding the fundamentals of—and differences between—these common project management approaches can help you demonstrate your project management knowledge during an interview. It can also help you evaluate a project to determine the right approach when working on the job.

Waterfall and Agile are implemented in many different ways on many different projects, and some projects may use aspects of each. The chart below briefly describes and compares Waterfall and Agile approaches. You can use it as a quick reference tool, but be aware that in practice, the differences between these two approaches may not always be clearly defined.

	Waterfall	Agile
Project manager's role	Project manager serves as an active leader by prioritizing and assigning tasks to team members.	Agile project manager (or Scrum Master) acts primarily as a facilitator, removing any barriers the team faces. Team shares more responsibility in managing their own work.
Scope	Project deliverables and plans are well-established and documented in the early stages of initiating and planning. Changes go through a formal change request process.	Planning happens in shorter iterations and focuses on delivering value quickly. Subsequent iterations are adjusted in response to feedback or unforeseen issues.

Schedule	Follows a mostly linear path through the initiating, planning, executing, and closing phases of the project.	Time is organized into phases called Sprints. Each Sprint has a defined duration, with a set list of deliverables planned at the start of the Sprint.
Cost	Costs are kept under control by careful estimation up front and close monitoring throughout the life cycle of the project.	Costs and schedule could change with each iteration.
Quality	Project manager makes plans and clearly defines criteria to measure quality at the beginning of the project.	Team solicits ongoing stakeholder input and user feedback by testing products in the field and regularly implementing improvements.
Communication	Project manager continually communicates progress toward milestones and other key indicators to stakeholders, ensuring that the project is on track to meet the customer's expectations.	Team is customer-focused, with consistent communication between users and the project team.
Stakeholders	Project manager continually manages and monitors stakeholder engagement to ensure the project is on track.	Team frequently provides deliverables to stakeholders throughout the project. Progress toward milestones is dependent upon stakeholder feedback.

3.3.4 Introduction to Lean and Six Sigma



Now, you've got Waterfall and Agile methodologies in your project manager toolbox, **Lean Six Sigma** is one more you can add. It's a **combination of two parent methodologies, Lean and Six Sigma**. The uses for Lean Six Sigma are **common in projects that have goals to save money, improve quality, and move through processes quickly**. It also **focuses on team collaboration which promotes a positive work environment**. The idea is that when **your team feels valued, motivation and productivity increases** and the whole process functions more smoothly.

There are **five phases** in the **Lean Six Sigma approach**. They are **define, measure, analyze, improve, and control**, commonly known as **DMAIC**. DMAIC is a **strategy for process improvement**, meaning you're trying to **figure out where the problems are** in the current process and **fix them** so that everything runs more smoothly. The goal of each step is to ensure the best possible results for your project. Just like with Waterfall and Agile, there're more specific details for using DMAIC and the Lean Six Sigma approach. But what's **great about the DMAIC process** is that **it can be used to solve any business problem**.

Define

The **first phase** is to **define the project goal and what it will take to meet it**. This first phase is **very similar to the initiation phase** of traditional project management. Let's take a real scenario to illustrate. Imagine that you are brought on as a project manager for a large travel company to help streamline and minimize customer service wait times that have been surging due to a recent sales promotion. Before you begin working on tackling the issue, you're going to need to define the project goal and talk to stakeholders about expectations for the project. In this case, the goal is to take average wait times down to less than 10 minutes on average compared to 30 minutes.

Measure

Next, it's time to **measure how the current process is performing**. In order to improve processes, **DMAIC focuses on data**. Here you want to map out the current process and locate exactly where the problems are and what kind of effect the problems have on the process. Using our example, you're trying to figure out why it's taking so long for the travel company to address a customer service issue. To do this, you look at company data like average wait times, number of customers per day, and seasonal variations. Then you'll set a plan for how you'll get that data and how often to measure it. This could look something like having the company generate reports on a weekly, monthly, quarterly basis. In other situations, you might have employees or customers fill out surveys or look at inventory, shipping, and tracking records, things like that.

Analyze

Once you have the data and measurements, you can move on to the next phase which is analyze. Here, you'll begin to **identify gaps and issues**. In our example, after mapping out the process and data points, you may see that staffing is inadequate on days where customers are the highest. **Data analysis is important for project managers** regardless of which method you choose and we will learn more about that in an upcoming course.

Improve

From your data, you'll have a **strong understanding of causes and solutions to get to the next stage**, improve. Oftentimes, project managers may want to leap straight to this phase but really **projects in process improvements should only be made after a careful analysis**. This is the point where you **present your findings and get ready to start making improvements**. In our example, this could be modifying staffing to address customer needs.

Control

The **last step** of this cycle is **control**. You've gotten the process and project to a good place, and now it's time to **implement it and keep it there**. **Controlling** is all about **learning from the work you did up front to put new processes and documentation in place and continue to monitor** so the company doesn't revert back to the old, inefficient way of doing things.

To sum it all up, you can remember DMAIC like this:

- defining tells you what to measure
- measuring tells you what to analyze
- analyzing tells you what to improve
- improving tells you what to control.

Lean Six Sigma and the DMAIC approach are ideal when the **project goal includes improving the current process to fix complex or high risk problems** like improving sales, conversions, or **eliminating a bottleneck**, which is when things get backed up during a process. **Following the DMAIC process prevents the likelihood of skipping important steps** and **increases the chances of a successful project**. As a way for your team to discover best practices that your client can use going forward, it **uses data and focuses on**

the customer or end-user to solve problems in a way that builds on previous learning so that you can **discover effective permanent solutions for difficult problems**.

There are many ways out there that break the flow of project management into digestible phases and approaches, all with the same end goal of accomplishing the desired outcome as smoothly as possible and delivering the best value. At Google we follow a lot of different approaches. For instance, an engineering team releasing a customer-focused product may primarily use Agile when creating the product, but decide to plug in some of the aspects of Waterfall project management for planning and documentation. A customer service team might focus on using Lean Six Sigma to improve an experience for our users like offering new features based on a recent analysis. But the team might develop parts of the code and roll out the features using Agile iterations and sprints to allow for change. Or one of our internal education and training teams may focus solely on Waterfall project management to achieve a targeted goal of having all employees complete an annual compliance training. Here, Waterfall makes sense since the requirements of the training program are fixed and so is the deadline and goal.

The biggest takeaway is to **know the various methods and tools** to be able to confidently **apply what works best for you, your team, and the end goal**. There is no real prescription for how to execute a project perfectly because there're always pieces you can't 100 percent control. But the good news is, you can get pretty close with the skill sets you develop through learning about these different frameworks.

3.3.5 Lean and Six Sigma methodologies

Previously you learned about Agile and Waterfall project management approaches. Now, we will define some key concepts from Lean and Six Sigma methodologies. We will learn how these methodologies can be used to organize and manage your projects, and we will discuss which is the most effective for different kinds of projects.

Lean

Lean methodology is often referred to as Lean Manufacturing because it originated in the manufacturing world. The main principle in Lean methodology is the removal of waste within an operation. By optimizing process steps and eliminating waste, only value is added at each phase of production.

Today, the Lean Manufacturing methodology recognizes eight types of waste within an operation: defects, excess processing, overproduction, waiting, inventory, transportation, motion, and non-utilized talent. In the manufacturing industry, these types of waste are often attributed to issues such as:

- Lack of proper documentation
- Lack of process standards
- Not understanding the customers' needs
- Lack of effective communication
- Lack of process control
- Inefficient process design
- Failures of management

These same issues create waste in project management.

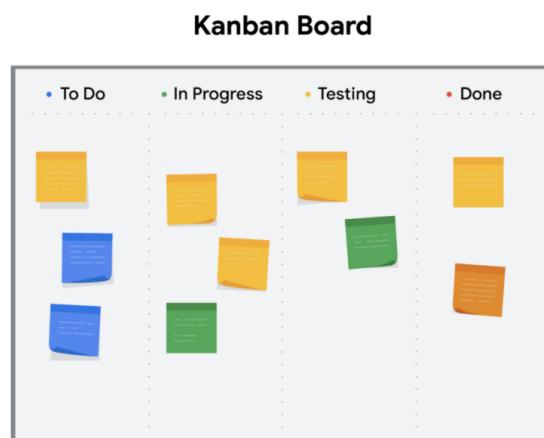
Implement Lean project management when you want to use limited resources, reduce waste, and streamline processes to gain maximum benefits.

You can achieve this by using the pillars of the Lean 5S quality tool. The term 5S refers to the five pillars that are required for good housekeeping: sort, set in order, shine, standardize, and sustain. Implementing the 5S method means cleaning up and organizing the workplace to achieve the smallest amount of wasted time and material. The 5S method includes these five steps:

1. **Sort:** Remove all items not needed for current production operations and leave only the bare essentials.
2. **Set in order:** Arrange needed items so that they are easy to use. Label items so that anyone can find them or put them away.
3. **Shine:** Keep everything in the correct place. Clean your workspace every day.
4. **Standardize:** Perform the process in the same way every time.
5. **Sustain:** Make a habit of maintaining correct procedures and instill this discipline in your team.

Within the Lean methodology, 5S helps you boost performance.

The final concept of Lean uses a **Kanban** scheduling system to manage production. The Kanban scheduling system, or Kanban board, is a visualization tool that enables you to optimize the flow of your team's work. It gives the team a visual display to identify what needs to be done and when. The Kanban board uses cards that are moved from left to right to show progress and help your team coordinate the work.



Kanban boards and 5S are core methods of the Lean methodology. They can help you successfully manage your project. Now let's analyze the Six Sigma method and learn when is the best time to use it.

Six Sigma

Six Sigma is a methodology used to reduce variations by ensuring that quality processes are followed every time. The term “Six Sigma” originates from statistics and generally means that items or processes should have 99.9996% quality.

The seven key principles of Six Sigma are:

1. Always focus on the customer.
2. Identify and understand how the work gets done. Understand how work really happens.
3. Make your processes flow smoothly.
4. Reduce waste and concentrate on value.
5. Stop defects by removing variation.
6. Involve and collaborate with your team.
7. Approach improvement activity in a systematic way.

Use this methodology to find aspects of the product or process that are *measurable* like time, cost, or quantity. Then inspect that measurable item and reject any products that do not meet the Six Sigma standard. Any process that created unacceptable products has to be improved upon.

Now that you understand both Lean and Six Sigma, let's see how they come together to improve the performance of your project!

Lean Six Sigma

After both Lean and Six Sigma were put into practice, it was discovered that the two methodologies could be combined to increase benefits. The tools used in Lean, such as Kanban boards and 5S, build quality in processes from the beginning. Products developed using Lean methods are then inspected or tested using Six Sigma standards. The products that do not meet these standards are rejected.

The largest difference between these methodologies is that Lean streamlines processes while Six Sigma reduces variation in products by building in quality from the beginning and inspecting products to ensure quality standards are met. You may find that one of these two methods—or using them both together—can improve the efficiency of your projects.

3.3.6 Common project management approaches and how to select one

You have been learning a lot about different project management approaches and when to use them. In this reading, we will briefly recap some of the most common ones and recommend a couple of articles with supporting information. You'll continue to learn more about these approaches throughout this certificate program.

Popular project management approaches

Below is a brief recap of some of the project management approaches you've been introduced to so far:

Waterfall is a traditional methodology in which tasks and phases are completed in a linear, sequential manner, and each stage of the project must be completed before the next begins. The project manager is responsible for prioritizing and assigning tasks to team members. In Waterfall, the criteria used to measure quality is clearly defined at the beginning of the project.

Agile involves short phases of collaborative, iterative work with frequent testing and regularly-implemented improvements. Some phases and tasks happen at the same time as others. In Agile projects, teams share responsibility for managing their own work. Scrum and Kanban are examples of Agile frameworks, which are specific development approaches based on the Agile philosophy.

Scrum is an Agile framework that focuses on developing, delivering, and sustaining complex projects and products through collaboration, accountability, and an iterative process. Work is completed by small, cross-functional teams led by a Scrum Master and is divided into short Sprints with a set list of deliverables.

Kanban is a tool used in both Agile and Lean approaches that provides visual feedback about the status of the work in progress through the use of Kanban boards or charts. With Kanban, project managers use sticky notes or note cards on a physical or digital Kanban board to represent the team's tasks with categories like "To do," "In progress," and "Done."

Lean uses the 5S quality tool to eliminate eight areas of waste, save money, improve quality, and streamline processes. Lean's principles state that you can do more with less by addressing dysfunctions that create waste. Lean implements a Kanban scheduling system to manage production.

Six Sigma involves reducing variations by ensuring that quality processes are followed every time. The Six Sigma method follows a process-improvement approach called DMAIC, which stands for define, measure, analyze, improve, and control.

Lean Six Sigma is a combination of Lean and Six Sigma approaches. It is often used in projects that aim to save money, improve quality, and move through processes quickly. Lean Six Sigma is also ideal for solving complex or high-risk problems. The 5S organization framework, the DMAIC process, and the use of Kanban boards are all components of this approach.

Despite their differences, all of these project management methodologies require communication and collaboration among various teams and aim to deliver projects on time and within budget.

Selecting a project management approach

With so many methodologies available, there are many options that would work well for your project. Since projects and the organizations in which you will execute them vary greatly, the approach you choose to implement for each project will vary. At Google, we often use a hybrid of approaches and frameworks to efficiently meet the project goal! All approaches can be combined with others, depending on the needs of your project.

Choosing an approach that works best for the project, the organization, and the team takes time and practice. You'll learn more about how to choose a project management approach throughout this certificate program. In the meantime, take a look at how this article breaks down common methodologies and when (or when not) to use them: [Which project management methodologies should you use?](#)

3.3.7 Identify: Project management methodologies

Agile / Scrum	Waterfall	Lean Six Sigma
Receptive to change	Project manager is an active leader who prioritizes and assigns tasks to the team	Uses the 5S quality tool
Planning happens in short iterations to deliver value quickly	Follows a mostly linear path through the project phases.	Ideal for fixing complex or high-risk problems
Tests products in the field and regularly implements improvements	Project phases are clearly defined. They typically do not overlap or repeat.	Primarily uses a Kanban scheduling system to manage production
Teams share responsibility for managing their own work	Project deliverables and plans are well-established and documented early on	Aims to eliminate 8 areas of waste
Time is organized into "Sprints" with a set list of deliverables	Change is often difficult to manage once the project begins	

Weekly Challenge 3

1. A project manager evaluates how the project went and celebrates the team's hard work. What phase of the project life cycle are they implementing?

- Close the project
- Improve and control
- Initiate the project
- Execute and complete tasks

 **Correct**

2. Why is it important to initiate a project (phase one) before making a plan (phase two)?
- Because executing and completing tasks is crucial to understanding scope, cost, and timeline
 - Because establishing your team is crucial to have in place before understanding scope, cost, and timeline
 - Because understanding scope, cost, and timeline is crucial to creating a budget, setting a schedule, and determining roles and responsibilities
 - Because creating a budget, setting a schedule, and determining roles and responsibilities is crucial to understanding scope, cost, and timeline

 **Correct**

3. Choose the best definition for a project management methodology.
- A project management methodology is a set of guiding ethical values for operating a project through its life cycle.
 - A project management methodology is a set of guiding tasks and measurements for owning a project through its life cycle.
 - A project management methodology is a set of guiding principles and processes for owning a project through its life cycle.
 - A project management methodology is a set of guiding laws and measures for owning a project through its life cycle.

 **Correct**

4. Which project management methodology describes the ability to move quickly and easily through a project by working on many tasks at once?
- Waterfall methodology
 - DMAIC methodology
 - Agile methodology
 - Lean Six Sigma Methodology

 **Correct**

5. What is the main advantage of the Waterfall methodology over the Agile approach?
- Waterfall has clearly defined expectations and helps teams avoid expensive changes to a project once it has started.
 - Waterfall allows for easy reorganization of tasks as the project progresses.
 - Waterfall takes a flexible approach, letting teams make adjustments as they go.
 - Waterfall focuses on reducing waste within an operation.

 **Correct**

6. The Lean Six Sigma approach includes which of the following phases?

- Impact, measure, define, control, analyze
- Measure, define, apply, improve, control
- Define, measure, analyze, improve, control
- Connect, control, impact, apply, analyze

 **Correct**

7. Which of the following are project manager responsibilities during the initiation phase? Select all that apply.

- Create a budget
- Get project approval

 **Correct**

- Determine resources needed

 **Correct**

- Define project goals

 **Correct**

8. Which of the following are project manager responsibilities during the execution phase? Select all that apply.

- Handle communication for the team

 **Correct**

- Make adjustments to the schedule, budget, and resources

 **Correct**

- Manage the project's progress

 **Correct**

- Do the majority of the work

9. A project manager has identified the major milestones of the project and what tasks make up each milestone. What project phase have they just completed?

- Initiate the project
- Close the project
- Make a plan
- Execute the project

 **Correct**

10. Which project management approach is an Agile framework that delivers products through an iterative process?

- Scrum
- Waterfall
- Six Sigma
- Lean

 **Correct**

Week 4 : Organizational Structures and Cultures

Learning Objectives

- Define change management and summarize its relationship to the project management role.
- Define organizational culture and explain how it impacts project management.
- Identify common types of organizational structures.
- Define organizational structure and explain how it impacts project management.

4.1 Understanding Organizational Structure

4.1.1 Overview of Classic and Matrix structures

Organizational structure refers to the way a company or organization is arranged or structured. This structure also tells you **how job tasks are divided and coordinated** and **how all the different members of the organization relate to one another.** In other words, **organizational structure gives you a sense of who reports to who.** But organizational structure is much more than that. Understanding the **different types of organizational structures** can serve as a map to help you **determine where you fit in, who you should communicate with, and how frequently to communicate with them.**

An organization's structure is most commonly mapped out using a **reporting chart** or "org chart," which is short for "**organizational chart.**" **Reporting charts show the relationship between people and groups within the organization,** and **details who each person or group reports to.**

There are a few different types of organizational structures. But for this course, we're going to focus on two of the more popular ones: **Classic and Matrix.**

Classic

The **Classic grouping** includes what are usually called "**functional**" or "**top-down**" **structures.** The Classic grouping **follows a typical chain of command** where the Chief Executive Officer, also known as CEO, and other **executives are at the top, followed by directors or managers,** then their direct reports and so on. Each of these directors or managers typically oversee teams within their function of the organization, like marketing, sales, or human resources. You can see this type of structure in effect by looking at a branch of the military. Take the Army, for example. You may enter the Army as a private, and report up to a sergeant who oversees multiple people in your squad, and that sergeant ultimately reports up to a lieutenant and so on. If your organization works in this structure, as the project manager, you might **communicate regularly with your manager, the person directly above you,** and also **with your peers who work on the same types of projects as you.**

Matrix

There isn't always a straightforward, top-down approach. There are other factors at play that make organizational structures a bit more complicated than we can see on paper. For instance, you may have project teams that sit across different functions. This is common in many companies, Google included, and is usually referred to as the **Matrix structure**. You might think of a Matrix structure as **a grid where you still have people above you, but you also have people in adjacent departments who expect to hear updates on your work progress**. These people may not be your direct bosses, but you are responsible for communicating with them, since **they may inform changes to your work**. For example, at Google, we have the major functions of marketing, sales, and more, with the traditional reporting chain. But we also have programs for our products, like Google Search, where project teams consist of program managers, engineers, user experience or "UX" designers, and so on, and each team member reports to their own management chains.

So to recap, the **Classic structure follows a traditional, top-down system of reporting**, and the **Matrix structure has direct higher-ups to report to and stakeholders from other departments or programs**.

4.1.2 A project manager's role within different organizational structures

In the last video, you learned about the way a company is arranged, which is called **organizational structure**. You also learned that two of the most common organizational structures are **Classic** and **Matrix**.

Understanding the differences in Classic and Matrix organizational structures can help you ask questions during a job interview to fully understand the role and responsibilities you are considering. This will also help you understand which skills will be most important for you to have if you get the position.

Once you are hired into a role, knowing a company's organizational structure can help you identify key points of communication and key stakeholders. It can also help you navigate within the organization when you need support or need to determine who has authority in a certain situation. Let's examine the characteristics of each of these organizational structures in greater depth so you can identify the type of structure an organization has and how to navigate it as a project manager.

Classic organizational structures

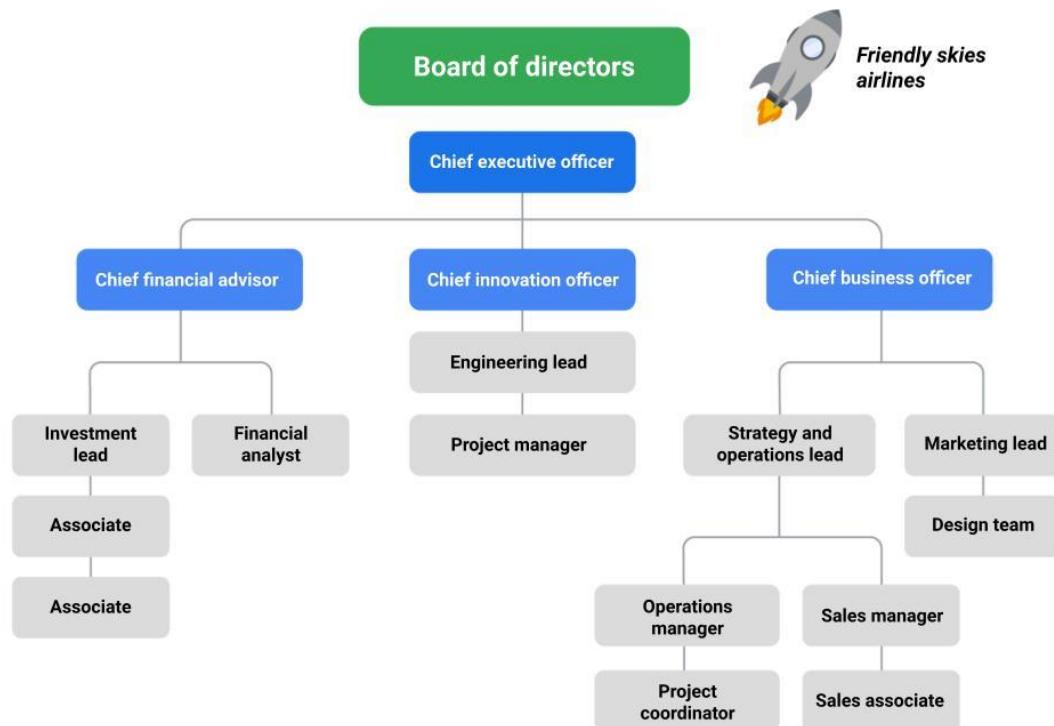
The **Classic organizational structure** is a top-down hierarchy system, where a Chief Executive Officer (CEO) has direct authority over several department managers. The department manager has direct authority over several other sections of employees. This system requires communication both up and down the ladder. In a Classic structure, authority comes from the top and filters to the bottom. Frequent reporting of project status updates may be required to pass up through management levels to keep higher leaders informed.

Classic organizations are also referred to as **functional organizations** because the organization is divided into departments based on function. Each department is led by a **functional manager**, and employees are grouped according to the functions of their role. For example, the main function of Friendly Skies Airlines, an airline company, is to fly airplanes. There are typically departments logically arranged to fulfill other important company functions, such as Marketing, Human Resources, and Strategy. Employees usually have a specialty within the organization and may not work within other areas during normal everyday operations.

Managing a project in a Classic organization

Friendly Skies Airlines has a Classic organizational structure, as indicated by its reporting or “org” chart.

Classic Org Chart

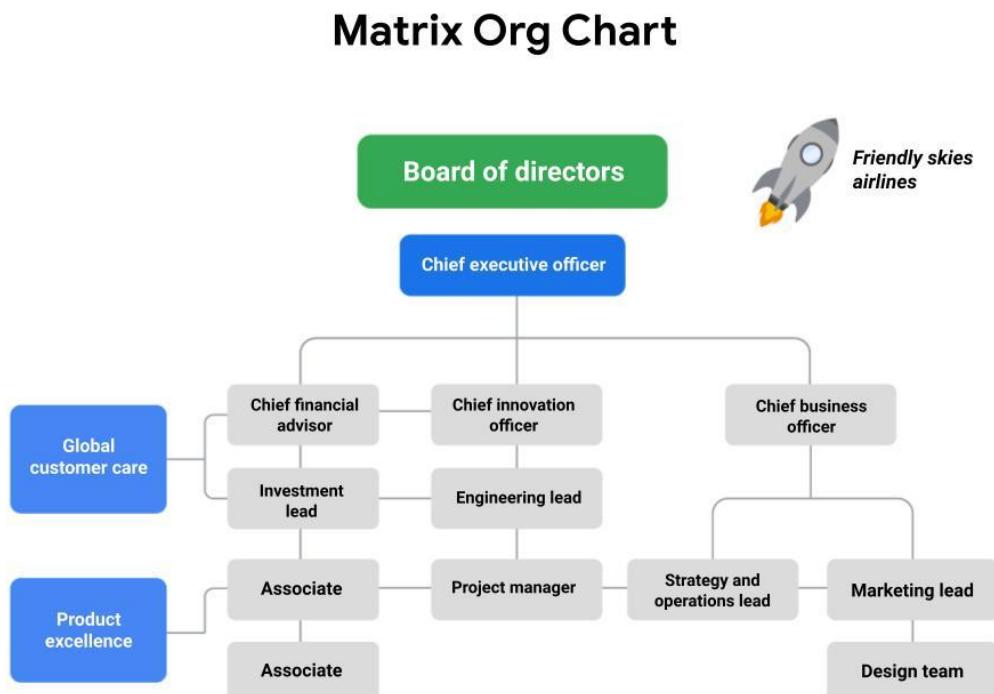


Imagine that the Friendly Skies Airlines Board of Directors approves an initiative to retrofit existing airplanes to carry more passengers. The CEO sponsors a project team to redesign the airplanes. The project will be led by a project manager from the Engineering and Innovation department and will require representatives from Finance, Marketing, Strategy, and Operations, along with several other team members from the Design department, to successfully complete the project.

The project team will typically remain in their reporting lines but act as their own assembled team. They do not fall under any of the existing functional departments. In the Classic organizational structure, the project builds from already existing departments to form teams.

If you are a project manager in this type of structure, you may need to consult with functional managers to understand your resources and the capacity of each teammate, as well as to familiarize yourself with each function's internal processes and approval structure. Your authority may be slightly limited due to competing priorities, approval chains, and other complexities, but setting expectations up front will enable you to navigate the organization and execute your project successfully.

Matrix organizational structures



The **Matrix** structure differs from the Classic structure in that the employees have two or more managers. In Matrix structures, you still have people above you, but you also have people in adjacent departments with whom you will need to communicate on your work progress. Functional areas tend to cross paths more frequently, and depending on the nature of the work, the responsible manager for each area has the most authority.

As a project manager in a Matrix organization, a team will essentially have at least two chains of command, or managers. You can think of the project manager as being a temporary manager while assigned to the team. The functional manager is consistent

regardless of the project a project manager is supporting. The visual below illustrates what the Friendly Skies Airlines would look like if it had a Matrix organizational structure.

Managing a project in a Matrix organization

Imagine that Friendly Skies Airlines is organized in a Matrix structure. Their Product Excellence team develops a new amenity kit for long-haul flights. They ask the Project Manager to help gather marketing materials that present research data about how this product fulfills passenger desires. The Project Manager is working on behalf of the Product Excellence team, but they are able to work in partnership with the Marketing team to create these materials.

You can read more about an overview of Matrix organizations in this [PMI article](#).

Key takeaway

In both Classic and Matrix organizations, project managers must clearly define roles and responsibilities in order to work effectively. However, within most Matrix organizations, some project managers or department leads may have the same level of authority as the functional managers and operate more directly.

Now you know how to identify Classic and Matrix organizational structures, how project managers fit into them, and how an organization's structure may affect projects. You are well on your way to becoming a great project manager in any organizational structure!

4.1.3 How organizational structure impacts project management

Knowing what kind of organizational structure you're working in plays a major role in how you prepare for and carry out your project. An **organization's structure provides the framework for accountability and communication**. As the project manager, it's vital that you **understand who you're reporting to on each project**, and just as importantly, **who the members of your team report to**. Knowing the organizational structure also tells you **how and where to get the resources you'll need** so you can get the project done efficiently. When you understand the organization's structure, you'll be able to **identify how it impacts the way you manage the project**. One way organizational structure can impact the way you manage a project is **by the amount of authority given to the project manager**. **Authority has to do with your ability to make decisions for the project that impact the organization**. In some cases, you might have the authority to do things like select the vendors who provide services or goods for the project. Other times, you might have a set of vendors selected for you. Your **level of authority and responsibility will vary** from project to project. Another way organizational structures can impact project management is through **resource availability**. Managing a project is a lot easier when you know how to access the people, equipment, and budget that you need.

In a **Classic structure**, you might find yourself with **less authority and a tighter scope**. You may need to **rely on getting approval from the appropriate managers, directors, and department heads** in order to **move forward and complete certain tasks**. In this case, it's likely that these people are in charge of the people on your team and the resources you need. As a project manager working in a Classic structure, you may **depend on the**

managers in your organization to approve resources. In other words, the amount of people working on your project or the budget that you have allocated to your project is decided by the leaders of your department or function. In a Classic structure, you may have to go through a chain of approvals and advocate for more resources if you need them. For example, if you need a budget increase, you would report this to your manager. Then your manager might escalate this up to their management chain to get approval.

The main difference with a **Matrix structure** is that employees often **have two or more managers or leaders they'll need to work with and update. Your team members will have their functional manager and you, the project manager.** If members are working on multiple projects, they may have even more managers. This can affect your authority as a project manager, as you will **need to cooperate with more than one leader in the organization.** You may need to **share resources and negotiate priorities.** The key is to **make sure you know who your stakeholders are and who controls what** since the chain of command isn't always as clearly defined as in the Classic structure. Because there isn't always a clear chain of command in a Matrix structure, you need to **make sure you have identified and communicated with anyone you might need to report to and get approval from** well before the project begins. Once this is established though, your project within a Matrix structure should be able to run efficiently. Matrix structures emphasize a **strong project focus from the team and the organization.** You as the project manager, generally **have more autonomy to make decisions and gather resources as needed.**

4.1.4 The role of a Project Management Office

In this lesson, you are learning about different types of organizational structures. Project managers serve key functions in both Classic and Matrix organizations. Within both of these types of structures, there is sometimes a group devoted specifically to program management with the organization: the Project Management Office. In this reading, we will discuss the purpose and functions of a Project Management Office.

What is a PMO?

A Project Management Office, or PMO, is a group within an organization that defines, sets, and helps maintain project management standards and processes throughout that organization. It often acts as a coordinated center for all of the organization's projects, helping them run more smoothly and efficiently.

An organization's project managers may operate within the PMO itself or within other departments. At Google, for example, there are project managers who work in a PMO focused on operational excellence, but there are numerous project and program managers in other departments throughout the organization, as well.

What are the functions of a PMO?

PMOs offer guidance and support to their organization's project managers. They share best practices, project statuses, and direction for all of the organization's projects while often taking on strategic projects themselves. The main functions of a PMO include:

Strategic planning and governance

This is the most important function of a PMO. This involves defining project criteria, selecting projects according to the organization's business goals, and then providing a business case for those projects to management.

Best practices

PMOs help implement best practices and processes within their organization. They also share lessons learned from previous successful projects. They help ensure consistency among their organization's projects by providing guidance about processes, tools, and metrics.

Common project culture

PMOs help set common project culture practices by training employees about optimal approaches and best practices. This helps keep project management practices consistent and efficient across the entire organization.

Resource management

PMOs are often responsible for managing and allocating resources—such as people and equipment—across projects throughout the organization based on budget, priorities, schedules, and more. They also help define the roles and responsibilities needed on any given project. PMOs provide training, mentoring, and coaching to all employees, but project managers in particular.

Creation of project documentation, archives, and tools

PMOs invest in and provide templates, tools, and software to help manage projects. They also play an important role in maintaining their organization's project history. Once a project closes, they archive all of the documents created during the project for future reference and to capture lessons learned.

Key takeaway

To recap, the key purposes of a PMO include: strategic planning and governance, implementing project management best practices, establishing common project culture, resource management, and creating project documentation, archives, and tools. PMOs support their organizations in managing large numbers of projects and help keep all employees working in the same direction towards the organization's goals.

Test your knowledge: Understanding organizational structure

1. Which of the following scenarios best describes a Classic structure?

- Imagine you work alongside a small group of project managers. One of your current projects shares team members with another, ongoing project. To make sure you hit your next milestone, you want your team members to work only on your project for the next two weeks. You decide to meet with your team to discuss your proposal.
- Imagine you work at a small marketing agency, and you have just begun a new project. All of the company's graphic designers work in the Art department and report to the Art Director. However, two of those graphic designers have been assigned to your project, so they will also report to you while working on the project.
- Imagine you are managing an important project at a company that requires all orders to go through its shipping department. However, your project is on a tight schedule, and the shipping department has a backlog of orders. You decide to meet with your direct manager to ask for approval to place the order through a third-party vendor. Ultimately, your direct manager has to meet with a vice president to get final approval.

 **Correct**

In a Classic organization, project managers are part of a top-down hierarchy and should communicate with their direct managers frequently to keep them informed.

2. Why is it important for a project manager in a Matrix organization to clearly define roles and responsibilities? Select all that apply.

- Because employees may report to more than one person and have multiple responsibilities across teams

 **Correct**

In both Classic and Matrix organizations, project managers must clearly define roles and responsibilities in order to work effectively. However, within most Matrix organizations, some project managers may have the same level of authority as the functional managers and operate more directly.

- Because project managers need to identify their single manager or director
- Because project managers must get approval from their direct superiors for any decisions they make about day-to-day project activities
- Because project managers can have the same level of authority as functional managers

 **Correct**

While it's always important to define roles and responsibilities clearly, the more complex reporting structure of a Matrix organization makes this task especially crucial. Functional areas tend to cross paths more frequently, and depending on the nature of the work, the responsible manager for each area has the most authority.

3. What are some ways that organizational structure can impact the role of a project manager? Select all that apply.

Their access to resources

 **Correct**

Organizational structure may affect how the project manager accesses the people, equipment, and budget that they need. A project manager working in a Classic structure may depend on the functional managers in their organization to approve resources. In a Matrix structure, a project manager may need to share project resources and negotiate priorities with other groups.

Their level of authority

 **Correct**

A project manager's level of authority and responsibility will vary in different organizational structures. In a Classic structure, a project manager might have less authority and a tighter scope. In a Matrix structure, a project manager will have to cooperate with other leaders in their organization and may have less direct authority over their team members.

Their possibility of career growth

Their approach to getting approvals

 **Correct**

Since Classic structures have a clear chain of command and Matrix structures do not, the process for getting approvals in these organizational structures differs. A project manager in a Classic structure may have to get approval from the appropriate managers, directors, and department heads in order to complete certain tasks. A project manager in a Matrix organization, on the other hand, may have more autonomy to make decisions for the project as needed.

4. What are some key functions of a Project Management Office (PMO)? Select all that apply.

Implementing project management best practices

 **Correct**

PMOs share lessons learned from previous successful projects and provide guidance about processes, tools, and metrics to ensure consistency.

Strategic planning and governance

 **Correct**

PMOs define project criteria, select projects according to the organization's business goals, and provide a business case for those projects to management.

Creating project documentation, archives, and tools

 **Correct**

PMOs invest in and provide templates, tools, and software to help manage projects and help maintain their organization's project history.

Managing the organization's income and expenses

4.2 Understanding The Impact of Organizational Culture

4.2.1 Introduction to organizational culture

An organization's culture provides context and acts as a guide for what their people value, how they operate on a daily basis, how they relate to one another, and how they can be expected to perform. There are many ways to define organizational culture. Some definitions emphasize **teamwork and innovation**, while others focus on **attention to detail and achievement**. Entire thesis papers, workshops, and conferences are dedicated to defining and analyzing organizational culture.

Organizational culture is in part the values employees share, as well as the organization's values, mission, history, and so on. In other words, organizational culture can be thought of as the company's personality. Understanding an organization's culture will help you navigate your team more effectively toward achieving the project's goal. It also impacts the way you plan your project. You'll need to be familiar with an organization's culture, so that you can minimize conflict and complete the project with as much support and harmony as possible.

An organization's **mission and values can provide clues to its culture**. If you can demonstrate how the project supports the company's mission or how the project aligns with the company's values, you'll have more support from executives and stakeholders to get the approvals and resources you need. **Pay attention to what leaders in the organization value when conducting business.**

- Does the management team care about speed over perfection?
- How do people within the organization make decisions?
- Do they thoroughly examine every option for every decision?

This will help inform which values are the most important to them and how you can approach your decision-making. If you're ever stuck in your project and need guidance about making a certain decision, or are unsure how to communicate with someone in the organization, reviewing the mission and values may help direct you toward the right way to handle that situation.

Here's an example:

- if the company values **stability and user feedback**, it might encourage expanding the project timeline to allow for testing and then making decisions based on those testing results.
- If the company values **innovation and revenue growth**, it might encourage a shorter timeline to get the product out faster, and taking some risks to try out new ideas.

As a project manager, when you understand the different types of values, and what to prioritize, you'll have an idea of how you can better prepare for conversations within the organization.

Ideally, you'll want to have a good sense of an organization's culture before you start the first phase of your project. If you are interviewing for a project management position, asking

about the culture is a great way to get more information about the company. It also **shows the interviewer that you're knowledgeable about the impact culture can have** on a project.

To help you gain a better sense of an organization's culture, consider the following questions.

- How do people prefer to communicate? Is it primarily through scheduled meetings, via email, over the phone?
- How are decisions made, majority vote or top down approvals?
- What kinds of rituals are in place when someone new comes to the office? Are they taken out to lunch, given a tour of the building or introduced to the staff?
- How are projects typically run? Do they prefer a Classic, do they prefer Matrix, or some other style of project management?
- What kinds of practices, behaviors, and values are reflected by the people in the organization? Is overtime or weekend work an expectation? Are there company sanctioned social events?

Finding out what the company values, will tell you a lot about the culture. And how to handle communication, manage expectations, and identify potential conflicts as you work through your project.

Once you begin working on a project, here are some ways to **navigate company culture** that will help you get the most out of your team, and **ensure that your project is supported**.

- **Ask questions.** As you observe the culture, try asking your peers what they think is going well and what they would change. Your peers may have the same opinion as you, and if not you may learn something new you didn't learn in the interview process. Either way, you'll be in a better place to assess risk, adjust your current project, or be more prepared for projects in the future.
- **Make observations.** It's important to understand how things work, and what people like and respect about the company's culture. When working in different geographies, it's also important to be aware of established customs, like bowing, shaking hands, or wearing head coverings. This will help you gain understanding and form respectful relationships.
- **Understand your impact.** Be aware of your role as a change agent. **A change agent is someone who helps the organization transform by focusing on improving organizational effectiveness and development.** You and your project will most likely affect the organization in some way. Sometimes just the presence of a project manager creates changes in the office environment or employee dynamics. If your project requires major changes that the organization must adapt to, be mindful of how extreme those changes could be and seek feedback and approval early on. The company may not agree with certain kinds of changes that don't seem to fall in line with their mission, vision, or culture. It's important to recognize the limits or boundaries of changes to implement and understand what would be the most beneficial for the project and the company overall.

As you can see, **organizational culture has a strong influence** over how decisions are made about the project. The way an organization is structured usually influences the type of culture that exists. So it's important to consider both structure and culture when planning and carrying out your project.

4.2.2 Learning about an organization's culture

It is important to learn about the culture of the organization where you work or want to work. Understanding the company's culture can help you navigate your team through a project. Consider this quote from Peter Drucker, an expert on management: "Culture eats strategy for breakfast." Drucker is implying that the culture of a company always influences its success, regardless of how effective the company's business model may be. Organizational culture is critical to the health of a company, the people who work there, and the customers it serves.

The importance of organizational culture

- **Identity:** An organization's culture defines its identity. Its identity essentially describes the way the company conducts business, both internally and externally. A company's values and organizational culture go hand-in-hand; its values are part of its identity. You can almost think of an organization's culture as its personality. That is why it is important to learn your company's (or target company's) mission and value statements. The mission and value statements will help you understand why the company exists and will give you insight into what the company believes in and how it will behave.
- **People:** Strong, positive organizational culture helps retain a company's best employees. People who feel valued, engaged, and challenged are more likely to give their best and want to drive for success. An organization's culture can help keep talented employees at a company, and it can attract great people too! On the other hand, a toxic culture can have the opposite effect. It is important to find an organization with a culture that fits your personality. One way to find out more about an organization's culture is to talk to the people who work there. You can also take note of the current employees' attire, expressions, and overall behavior.
- **Processes:** Organizational culture can have direct impacts on a company's processes, and ultimately, its productivity. The organization's culture is instilled throughout the company—from its employees to how its employees do their job. For example, a company that values feedback and employee involvement might have that reflected in their processes by including many opportunities for employees to comment. By allowing employees to feel their voices are heard, this company is adhering to its culture.

Understanding an organization's culture

As a project manager, it is important to understand your company's culture, especially because it could affect the projects you work on. Some aspects of an organization's culture that are directly related to how you will manage projects are communication, decision-making, rituals, previous management styles, and values. To learn more about a company's culture and how it applies to you as a project manager, you can:

Ask questions

You can learn about an organization's culture by asking questions of management and peers. It can be helpful to ask these questions in the interview phase to better understand the company's culture before accepting a position. You might want to ask questions about:

Atmosphere

- What is the company's dress code?
- How do people typically share credit at this company?
- Is risk-taking encouraged, and what happens when people fail?
- How do managers support and motivate their team?
- How do people in this role interact with customers and users?
- When and how do team members give feedback to one another?
- What are some workplace traditions?
- What are some of the ways the company celebrates success?

Policies

- What are the policies around sick days and vacation?
- Does the company allow for employee flexibility (e.g., working from home, flexible working hours)?
- What policies are in place that support employees sharing their identity in the workplace?

Processes

- What is the company's onboarding process?
- How do employees measure the impact of their work?

Values

- What are the company's mission and value statements?
- How might the person in this role contribute to the organization's mission?
- How does the organization support professional development and career growth?

Listen to people's stories

Listening to what current employees have to say and how they portray the company will give you great insight.

- What were employees' experiences with similar projects in the past?
- What can they tell you about key stakeholders and customers?

Take note of company rituals

Rituals can be powerful drivers of culture. They engage people and help instill a sense of shared purpose and experience.

- How are birthdays and holidays celebrated?
- Do employees generally eat lunch at the same time and in the same place?
- Watch employee interactions: Observing how employees interact can help you tailor your interaction style to the company norm.
- Are employee interactions more formal or informal in nature?
- Are ideas solicited from employees in different roles?

Understand your impact

As a project manager, you become a **change agent**. Remember: a change agent is a person from inside an organization who helps the organization transform by focusing on improving organizational effectiveness and development. When you begin a new role, sit down with management to better understand what is expected of you and how you can make the most of the opportunity.

Sharpen your communication skills

Interpersonal communication skills are a major part of project management. How a company communicates is directly tied to its organizational culture. You will most likely have interactions with various departments and management levels while executing projects. To communicate effectively, you will need to understand how to navigate the different channels in your company. Ask questions about communication practices when you start a new role such as: Is it customary to sign emails from the team rather than from you individually? Should presentations include team members or be solely presented by the project manager? This can help you make sure you are adhering to expectations.

Approaching projects differently from how similar projects were managed in the past may be met with some resistance. Although some projects may call for you to break the status quo, when you show an appreciation of your organization's culture, you may help your team members accept any improvements you are implementing.

Key takeaway

Organizational culture is important because it has a direct impact on you as a project manager, and learning how to navigate organizational culture gives you a great advantage when you are executing projects. Being able to navigate departmental interactions, communicate effectively, and plan your project in line with the organization's culture will help set you up for success in your project management career path.

Test your knowledge: Understanding the impact of organizational culture

1. Fill in the blank. Organizational culture refers to a company's _____.

- stock price and capital
- logo and slogan
- income and expenditures
- values and personality



Correct
A company's organizational culture is almost like its corporate personality. It includes the organization's values, mission, and history.

2. A project manager can learn about an organization's culture in which of the following ways? Select all that apply.

- Ask employees about workplace rituals and traditions.



Correct
You can find out a lot about organizational culture by talking to employees about their experiences. Rituals can be powerful drivers of culture, and considering what current employees share about them will give you great insight.

- Survey employees on how their personal histories might impact their work.

- Observe employees within the organization.



Correct
Observing other employees can help you get a better sense of the organization's culture. When working in different geographies, it can also make you aware of established customs like bowing, shaking hands, or wearing head coverings.

- Ask management questions to better understand what they expect.



Correct
You can find out a lot about organizational culture by talking to managers about their expectations. It can be helpful to ask these questions in the interview phase to better understand the company's culture before accepting a position.

3. What are three reasons that it is important for project managers to understand a company's organizational culture?

It can help them avoid bumps in the road when their projects disrupt the status quo.

 **Correct**

Project managers are change agents, so finding out how things have worked in the past can help smooth the way for any changes they propose.

It can help them determine if they want to accept a position with the company.

 **Correct**

Asking questions about the organization's culture in an interview can help a project manager determine whether the position is a good fit for them. It also shows the interviewer that they are knowledgeable about the impact culture can have on a project.

It can affect many aspects of their projects.

 **Correct**

Organizational culture can have an impact on the way projects are run. Some aspects of an organization's culture that are directly related to how projects are managed are communication, decision-making, rituals, previous management styles, and values.

It can help them set an accurate budget.

4. Imagine you are interviewing for a project manager role at a local start-up. You are very interested in the work the organization is doing, but you want to find out more about their culture to make sure the position is a good fit. How could you find out more about the organization's culture? Select all that apply.

You could ask current employees about their experiences at the company.

 **Correct**

Considering how current employees portray the company will give you great insight into the organization's culture.

You could ask your interviewer questions about the organization's atmosphere, policies, processes, and stories.

 **Correct**

Asking questions about organizational culture during an interview can help you learn if the role is a good fit for you. It can also show the interviewer your awareness of how organizational culture can impact projects.

You could ask the HR department about the proposed salary for the role.

You could ask current employees about their employment history at other companies.

4.2.3 Case study: Balancing company culture and strategic goals

As you've learned, **organizational culture** refers to the values employees share and an organization's values, mission, history, and more. In other words, organizational culture can be thought of as a company's personality. A company's organizational culture can help drive its internal and external success. When a company's culture is aligned with its corporate strategy and goals, the level at which it can perform is impressive. When researching a company for a possible new job, understanding the company's culture can help you decide if it is a good fit for you and your priorities. Also, understanding a company's culture as a project manager can help you make informed choices about when you want your actions and decisions to fit within the culture or when you might choose to intentionally push back against the culture to effect change or create improvements. Let's explore an example of a positive organizational culture and how a project manager fits into that culture.

The Family Java culture

The Family Java coffeehouse has over 2,000 stores worldwide. The Family Java's culture is closely linked to their strategy and capabilities—this is what they feel sets them apart from other coffee shops. The company has invested in a relationship-driven, employees-first approach. Their culture establishes that the employees are what makes the company unique. This helps foster a warm, comfortable, and calm environment for both employees and customers alike. Because The Family Java's organizational culture has cultivated employees who genuinely care about the company and their jobs, those employees create the same environment for their customers to enjoy.

The Family Java's mission and values speak to this approach directly:

Mission

- To provide a welcoming environment where our employees become our family and our guests become our friends

Values

- To create a place where everyone is welcome
- To always give our best and hold ourselves accountable for the results
- To treat others with respect and kindness

The Family Java has worked hard to be able to create the structure to put their mission and values into practice daily. They practice these values, all while achieving new levels in sales and growth. For example, The Family Java believes in expressing their employees-first value by spending more on employee healthcare than on coffee beans! Each employee is crucial to the success of the company and their ability to fulfill their mission and adhere to their values. In turn, the company makes their employees feel valued by offering substantial training, education scholarships, assistance with daycare, and growth within the company.

The Family Java is able to capitalize on the critical link between culture and strategic goals to achieve optimal performance. When evaluating their organizational culture, the company focuses on their positive attributes and adapts to what works and has proven to be beneficial. By taking the time to perfect what the company does well, The Family Java has

created a culture that drives out negativity, empowers employees to be their best selves, and aligns with their strategic goals.

A project manager's relationship to organizational culture

Learning the company's values

Avi was excited to begin his role as a project manager at The Family Java. He had asked questions about the organization's culture during his job interview and was told about the company's people-first approach. Avi's previous company prioritized profitability over teamwork and mentorship. While his previous company was very successful, it was difficult for Avi to engage meaningfully in his work because the culture was so focused on financial results rather than on their employees' job satisfaction. Avi felt like The Family Java's approach better aligned with his own values.

Clarifying the company's expectations

Avi's manager at The Family Java said that his role would involve a substantial emphasis on team building and keeping morale high. When he began, Avi asked his manager to clarify the time investment expected by the company in order to accomplish team- and morale-building goals. He also asked for suggestions and guidance based on what had been done at the company in the past. If Avi had made incorrect assumptions about the company's culture and tried to manage projects with his previous company's culture in mind, he might have emphasized speed over collaboration and communication. Avi now knew that he would need to carefully balance expectations related to The Family Java's culture with the project workload in order to meet project timelines and achieve the desired outcome.

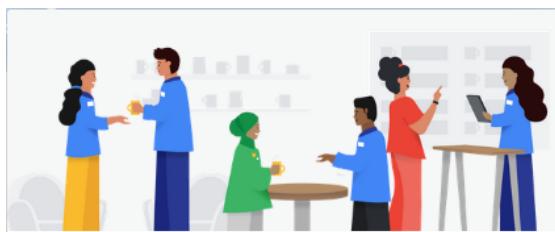
Applying organizational culture to a project

Before beginning his first project, Avi planned a team lunch to get to know everyone at The Family Java. Then, he scheduled one-on-one meetings with each of his team members to learn more about their working style and professional goals. He also asked how he could help support and remove any barriers for them. One of Avi's team members, Miguel, said that he needed to start his workday early because he picked his children up from school at 3:00. After hearing this, Avi avoided scheduling team meetings in the late afternoon. Another team member, Elisa, told Avi that she preferred face-to-face or phone conversations to email since she felt like she communicated better verbally. When Avi needed to discuss something with Elisa, he made sure that he talked with her in person as much as possible. Avi continued to check in with all of his team members regularly as the project progressed. He also scheduled weekly "Coffee Chats" with his team, since he had learned that this was company tradition. Avi's efforts to align his project management style to The Family Java's organizational culture were noticed by executives and stakeholders, and he was given a lot of support in getting the resources he needed.

Key takeaway

The culture of each organization you encounter will be different and can change over time. Like Avi, it is worth your time as a project manager to learn about your company's culture because it directly relates to your projects' success.

4.2.4 Explore: Organizational culture



Organization's mission and values

As they begin their shifts, one barista asks the other for tips on caring for a new parakeet. Because Family Java takes a people-first approach, employees are encouraged to share their enthusiasm for outside interests.

[GOT IT](#)



Organization's culture

Avi joins the team for their weekly "coffee chats." It's the best way for him to understand their day-to-day work. Management was impressed by the team's collaboration and started providing lunch for the occasion.

[GOT IT](#)



Organization's mission and values

After a customer places their order, an employee asks them about the pins on their jacket. The company's people-first approach extends to its customers, making them feel like part of a local community.

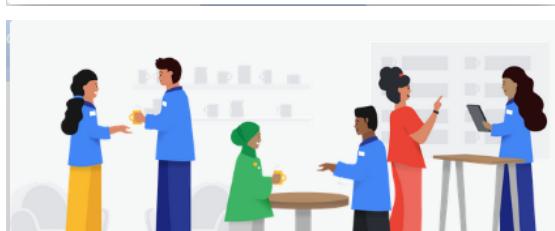
[OK](#)



Organization's culture

Avi is working on an update to the ordering app, so he's scheduled 1-on-1 meetings with each barista. This employee prefers in-person chats over video calls, so she and Avi are speaking in the break room.

[OK](#)



Organization's expectations

This employee is using a new tool to take a customer's order. The app took some time to develop, but it makes order entry much easier and eliminates mistakes. One large chai latte with oat milk coming up!

[GOT IT](#)

4.3 Understanding Change Management

4.3.1 Introduction to change management

In project management, the **process of delivering your completed project and getting people to adopt** it is called **change management**. Understanding change management can ensure that a **project is completed successfully** and that the **organization accepts and adopts the recommendations** from the project. For example, if you are launching a new time tracking system for employees, the project wouldn't be successful if the employees didn't adopt the new system.

When you understand change management and your role in the process, it can **ensure a smooth roll out of changes and easier adoption**. Adoption is often the first step to your project having the desired impact once it goes live.

As a new project manager, you may not be responsible for planning all of the required change management for your project. But regardless, you can help the success of the project by **understanding your role in the process** and **how your organization may react** to that change. It's important to recognize that it's the **people in an organization** who are directly **impacted by any changes** in the workplace. Implementing a new project can mean changes to processes, budgets, schedules, and employee roles and responsibilities. Even aesthetic changes, like building a new wing, renovating the lobby, or switching to a new company logo, means employees will have to adjust to something new and different. Something as simple as adding a new logo can lead to a major headache for the employees, who have to swap out all the old stationery and make sure everyone in the office is using the new logo correctly.

When you consider the success of your project, it's important to keep in mind the changes that people will need to implement as a **result**. Thinking through these changes will set you up for success in getting your project accepted and adopted.

Change management in project management is centered around **three core concepts** and best practices.

- **Create a sense of ownership and urgency around the project.** Ownership means getting others to feel they are empowered to take responsibility for the successful completion of their tasks. Urgency means getting them to understand that the project is important and to identify what actions need to be taken to move the project along. When team members feel a sense of ownership and urgency around a project, it increases interest, motivation, and engagement with the project outcome.
- **Figure out the right combination of skills and personalities** when selecting the people who will work on your team. Find people whose knowledge and skills complement one another. If your team is selected for you, see if you're able to choose who gets assigned which tasks. If that's not possible, then it's extra important for you to find ways to connect with your team. This will get them excited about the project so then they can be advocates for change when it's needed. One effective way of motivating your team is to communicate clearly your vision and approach for

the project. Then you can share how you see everyone working together as a team to make it happen. Communicating this idea clearly allows others to share in your vision and take ownership in bringing it to life.

- **Effective communication.** Communication is key. Having effective communication with your team means being **transparent and up front with your plans and ideas** and **making information available**. Make sure your team, along with the rest of the organization, is **kept up-to-date on your progress**. This will allow everyone to feel like they're included and part of the project. Once your project is complete, you may experience some resistance or a few roadblocks. Remember, change doesn't happen overnight, so don't give up on it yet. If you do get some push-back, you can move the process along by helping folks adjust, rewarding their efforts, and reminding them of the overall value the project is providing long-term.

Understanding the change process can help you **determine how you can support a successful response to your project**. For example, understanding the importance of communication will help you be mindful of clearly communicating project plans to your team, as well as communicating the expected impact of the project with the rest of the organization.

Many of the **principles of Agile Project Management align with successful change management**. How might an Agile team approach change management, you ask? Being **receptive to change is a core value** in Agile teams. You will often find that they are in a state of **evolution or are constantly adapting to change**.

4.3.2 A project manager's role in change management

In this lesson, you're learning about how to support the **change management** process for your project. To review, change management is the process of delivering your completed project and getting other people in the organization to adopt it. In this reading, we will discuss strategies for approaching change management as a project manager.

Your project's success depends on the adoption and acceptance of your project—whether that entails the launch of a new external tool or a process that will change operations at a production facility. In both cases, the greatest impact of the change will be on the people who use and interact with the product or process that is changing.

For example, if your website's user interface changes, the major impact of that change affects the user. The user must learn how the website has been reorganized and adapt to the new way to navigate it. If part of the website's interface update includes a new brand logo, the major impact of that change impacts your organization's employees. They must be made aware of the new logo and measures must be taken to ensure that all company communications include the new logo, not the old one.

You can help ensure your project's success by embracing changes as they come and by convincing the wider audience, whether that is the end user or members of the organization, to embrace changes, too. When you implement a careful approach to change management, you can address issues that might occur in the later stages of your project.

Integrating project management and change management

Change management is a major undertaking and a project in and of itself. When it comes to change management, you may not always be responsible for leading and planning the entire end-to-end process. There will be times when your manager, a team member, or another senior leader might be responsible for taking on that transition and successfully implementing the changes. However, just because you're not the one directly leading the change, there are still ways in which you can support and participate in the successful adoption of your project.

As a project manager, you can think of change management as necessary for the successful outcome of your project. Both change management and project management aim to increase the likelihood of project success. They also incorporate tools and processes to accomplish that goal. The most effective way to achieve a project goal is to integrate project management and change management, and it is your responsibility as a project manager to do so.

When you are thinking about change management as it relates to your project, begin by asking yourself the following questions:

- How will the organization react to change?
- Which influencers can affect change?
- What are the best means of communication?
- What change management practices will lead to the successful implementation of my project?

The answers to these questions will help you prepare for a variety of possible scenarios and allow you to craft solutions to effectively support the adoption of your project.

Let's look at some best practices for approaching change management on your projects:

Be proactive. Proactive and inclusive change management planning can help keep any potentially impacted stakeholders aware of the upcoming changes.

- Incorporate change management into your project management steps. For example, you can schedule time during team meetings or create a feedback document to ensure that your team members know there is a place to voice their suggestions and concerns.
- You can also plan steps towards the end of your project to introduce the deliverable to stakeholders in the form of demonstrations, question and answer forums, or marketing videos. You can factor all of these decisions into your plan so that any potential changes are less likely to impact your timeline. If these steps have not been built into your plan, you can escalate and stress the importance of a change management plan to your stakeholders.

Communicate about upcoming changes. Communication should occur regularly among impacted stakeholders, the change management team, and the project team. Check in and communicate throughout the project about how the changes will provide a better experience

for end users of the project deliverables. In this way, you support the process by providing everyone with the information they need to feel prepared to adjust to changes once the project is ready to launch.

Follow a consistent process. Following a clear change management process helps maintain consistency each time there is a change. The change management process should be established and documented early on in your project to guide how the project will handle change. Your organization may also have an overarching change management plan that can be adopted for your project. This may include when the promotion of the change should happen, when training should occur, when the launch or release will occur, and corresponding steps for each phase of the process.

Practice empathy. Changes are inevitable, but we are often resistant to them. By being empathetic to the challenges and anxiety change can bring, you can support the process in subtle ways.

Use tools. Incorporating tools to assist in the adoption of a change can be very helpful. Here are a few examples you can use on your next project:

- **Feedback mechanisms**, such as surveys, can capture input from stakeholders.
- **Flowcharts** can visualize the project's development process.
- **Culture mapping** can illustrate the company's culture and how the company's values, norms, and employees behavior may be affected by the change.

As the project manager, you are responsible for successfully delivering projects. As you hone the skill set you acquire throughout this program, you will find that change management is essential to your projects' success.

For more on how to participate in the change management process, check out the following resources:

- [Change Management at the Project Level](#)
- [5 Steps to Successful End-User Adoption](#)
- [Change Management Framework](#)

4.3.3 Participating in change management

Change management is actually a huge undertaking and a project in itself. As mentioned, you may not always be responsible for leading and planning the entire end-to-end change management process. Instead, you may ask a member of the project team, your manager, or another senior leader to help take on that transition. If you are **participating in change management**, then **someone else is responsible for successfully implementing the changes**.

Let's say you just completed the project of creating the new check-in system. The project is now at the point where it needs to be installed and adopted by the organization, but you don't have the formal authority or influence to enact this change. Your role as a project manager then doesn't include getting employees to use the new system, that's someone

else's job. But just because you're not the one directly calling for, or leading the change, there's still ways in which you can and should participate.

Being empathetic to the challenges of change management can help you **support the process in subtle ways**. In this case, **participating in change management** might mean **communicating with employees throughout the project** about how the system will provide a better experience for their customers. You **support the process by providing employees with information so they feel prepared to adjust to changes** once the system is ready to launch.

Let's explore the same pharmacy check-in project in two different organizational structures and with different team cultures to understand how these ideas are applied.

Say the pharmacy chain is a **Classic organizational structure** and has an informal corporate culture. The final project requires a name change from the old check-in system called "Speedy Care" to the new system called "Speedy Check-in." Getting this change implemented, is an example of change management. As the project manager, you need to participate in the change management process by communicating the project needs through the appropriate channels. In this case, the chief executive officer or CEO, sends an email to the C-suite, now these are all the chief level officers in an organization. The CEO lets them know that the name must be changed and to please inform their teams to implement the name change. Since this is a Classic structure within a hierarchical organization, the budgets are managed separately, and the marketing department needs to request an extra \$10,000 to change all of their printed posters for the stores. This request goes back up to the Chief Financial Officer or CFO. There may be other cost adjustments and process changes that need to happen across the organization to ensure a successful system name change. In this instance, you may need to have multiple meetings with others to help them understand what is changing, and why.

Now suppose that the pharmacy chain is a **Matrix organization structure** and has a formal corporate culture. What does change management look like in this scenario? Well, you might meet with representatives from marketing and technology to explain the overall budget impact for all the necessary changes. With the formal culture, you might write a document that describes all budget, timeline, and training impacted by the name change. Then you might circulate that document to get feedback and alignment from all the stakeholders and share that feedback with the CEO so they can understand the full scope of the name change. The feedback and alignment from the stakeholders will tell the CEO how the change management process went. Did everyone agree on the implications? Was the feedback positive, or was there resistance? Then, when the CEO needs to communicate the name change to the entire organization, she may have someone on her team write up a formal memo that describes why the name change needs to happen and share out the memo to her staff and their teams.

Understanding this framework can help you navigate how to effectively participate in and support change management. This understanding can allow you to **ask yourself questions** that will **inform change management**, such as:

- How will the organization react to change?
- Which influencers can affect change?

- What are the best means of communication?
- What change management practices will lead to the successful implementation of my project?

The **answers to these questions will help you prepare for a variety of possible scenarios**, and **craft solutions** to effectively **support the adoption of your project**. They will also help you **navigate possible challenges** along the way and lead your project through a successful change management process.

4.3.4 Corporate and project governance

Governance in business is the management framework within which decisions are made and accountability and responsibility are determined. In simple terms, governance is understanding who is in charge. In this reading, we will discuss corporate governance and project governance. It is important to learn how corporate and project governance are related since you may have to speak about governance in an interview. Additionally, you will need to understand how your project relates to the governance structure of the organization.

Corporate governance

Each organization is governed by its own set of standards and practices that direct and control its actions. Those standards and practices are called **corporate governance**, and they will influence your projects. Corporate governance is the framework by which an organization achieves its goals and objectives. Corporate governance is also a way to balance the requirements of the various corporate entities, such as stakeholders, management, and customers. Corporate governance affects every part of an organization, including action plans, internal and external controls, and performance measurements.

Governance and change management go hand-in-hand. Think back to the previous videos on change management. To successfully implement change management, it is essential that you understand the structure and culture of the organization. Effective governance in change management provides clearly defined roles and responsibilities during change. This enables the people within the organization to have a precise understanding of who makes decisions and of the relationship between those managing and participating in the change management process.

Another example of governance within an organization is the creation and use of **steering committees**. Steering committees decide on the priorities of an organization and manage the general course of its operations. The steering committee essentially acts as an advisory board or council to help the project manager and the company make and approve strategic decisions that affect both the company and the project.

Project governance

As a project manager, you will be responsible for **project governance**. Project governance is the framework for how project decisions are made. Project governance helps keep projects running smoothly, on time, and within budget. Project governance involves all the key elements that make a project successful. It tells you what activities an organization does

and who is responsible for those activities. Project governance covers policies, regulations, functions, processes, procedures, and responsibilities.

How project and corporate governance intersect

Project governance needs to be tailored to your organization's specific needs. These needs will influence how you implement and monitor the governance framework on your project. Project governance concerns those areas of corporate governance that are specifically related to project activities. Effective project governance ensures that an organization's projects are aligned to the organization's larger objectives, are delivered efficiently, and are sustainable. This includes:

- Considering the long- and short-term interests of your organization
- Making thoughtful decisions about which projects to take on and avoiding projects if you do not have sufficient resources
- Providing timely, relevant, and reliable information to the board of directors and other major stakeholders
- Eliciting the input and buy-in of senior managers since they are the decision-makers
- During the initiation phase, prioritizing clear, reachable, and sustainable goals in order to reduce confusion and conflict
- During the planning phase, assigning ownership and accountability to an experienced team to deliver, monitor, and control the process
- During the execution phase, learning from mistakes and adapting to new or improved knowledge

Corporate governance can involve clearing many hurdles before making decisions. These decisions can influence not only a single project, but the entire corporation.

At the same time, corporate governance can help support project governance, as it provides oversight on compliance and mitigating risk and offers guidance and direction for project managers. Good corporate governance can also help project managers secure resources, get issues addressed, avoid delays in decision-making, get buy-in from stakeholders, and achieve visibility for projects on the executive level.

Key takeaway

You should think about an organization's culture and structure when you are interviewing for a new role and as you begin a new role or project. You should consider an organization's governance processes and practices in the same way. This will help you understand how decisions are made, who is responsible for what, and what are the potential issues and areas of concern.

Test your knowledge: Understanding change management

1. What are three core concepts of the change management process?

- Create a sense of ownership and urgency around the project.

 **Correct**

When team members feel a sense of ownership and urgency around a project, it increases interest, motivation, and engagement with the project outcome.

- Select the right combination of skills and personalities for the team.

 **Correct**

A project manager should find team members whose knowledge and skills complement one another and get them excited about the project. They can be advocates for change when it's needed.

- Communicate effectively.

 **Correct**

To ensure effective communication with the team and the rest of the organization, the project manager can do three things. First, they can be transparent and up front with plans. Second, they can make information available. Third, they can make sure everyone is kept up-to-date on the project's progress.

- Adopt different change management best practices for each individual project.

2. Which of the following project outcomes will most likely require change management in the organization? Select all that apply.

- Installing new scheduling software on employees' computers

 **Correct**

Installing new software means that employees will need to adapt to how the software operates. Change management strategies would help support the transition to this new tool.

- Holding an annual meeting for stakeholders

- Kicking off planning for the next quarter

- Adopting a new supply ordering system

 **Correct**

Switching to a new system means that employees will need to learn new processes and protocols. Change management strategies would help support the transition to these new processes.

3. Which three best practices can help a project manager approach change management on their projects?

- Only incorporate change management strategies during the closing phase of the project life cycle.
- Practice empathy.

 **Correct**

Changes are inevitable, but people are often resistant to them. A project manager can support the process by being empathetic to the challenges and anxiety change can bring.

- Use tools to help implement a change.

 **Correct**

Incorporating tools like flowcharts, feedback mechanisms, and culture mapping to assist in the adoption of a change can be very helpful.

- Communicate about upcoming changes.

 **Correct**

Project managers should communicate throughout the project about how the changes will provide a better experience for end users of the project deliverables. This provides everyone with the information they need to feel prepared to adjust to changes once the project is ready to launch.

4. How does an organization align its project governance with its corporate governance? Select all that apply.

- By making thoughtful decisions about which projects to take on and avoiding projects if they don't have sufficient resources

 **Correct**

An organization should carefully select projects and avoid projects if there are insufficient resources to make them sustainable. Good project governance also includes clear communication with stakeholders and consideration of the long-term and short-term interests of the organization.

- By avoiding the input of senior stakeholders

- By providing stakeholders with timely, relevant, and reliable information

 **Correct**

Good project governance supports corporate governance with clear communication and attainable goals. It also involves making thoughtful decisions about what projects to take on and consideration of the long-term and short-term interests of the organization.

- By considering the long-term and short-term interests of the organization

 **Correct**

Leaders and stakeholders are more likely to support the project if it aligns with the overall interests and objectives of the organization. Good project governance also includes making thoughtful decisions about what projects to start and clear communication with stakeholders.

4.4 Pursuing Your New Career

4.4.1 Preparing for your job search

Once you complete the project management program, you'll have a new set of skills and knowledge that hiring managers look for in project managers. Deciding what you'd like to do with all that new knowledge is an exciting prospect. The great thing about project management is that it's a life skill that's useful at almost any organization.

Wherever your interests lie, whether that's gaming or biotech or something totally different, there's a good chance that your desired industry needs project managers. Finding the right job takes effort, consistency, and a little expert advice to help you along the way.

Throughout the program, there will be a collection of career-based videos included to help you find your next opportunity in project management. We'll cover some basics, such as building a resume and interviewing. We'll also include additional tips for creating an online professional presence through sites like LinkedIn, as well as tips on communicating and interviewing remotely.

4.4.2 How to uncover job opportunities

Starting a new career means not only developing a new skill set but also learning how to relate your previous experience and skills to the new role you're pursuing. If you're ready to start your journey on a new career path, this reading will help you position yourself for success in your job search. You'll learn how to understand what your potential employer is looking for and how to connect your background to their needs. The strategies outlined below are designed to help you become a strong job candidate, even if you don't have directly relevant experience.

The first step is to fully understand the role you're targeting.

Understand your target role

One of the primary challenges for anyone looking to launch a new career is how to stand out against candidates who already have experience in the field. Overcoming this challenge begins with developing a comprehensive understanding of the role you're targeting. You'll need to understand the role in the context of any company you're applying to, and more broadly as well. Having a holistic understanding of what it takes to succeed in your target role will help you determine your suitability for the role, and identify any steps you can take to improve your chances of getting hired.

To understand everything from minimum must-have requirements to skills that might help you stand out from the crowd, you can begin by researching and analyzing job descriptions across different organizations.

Below you'll find our recommended strategy for how to approach this process effectively.

Analyze job listings

The first part of the process is to gather information from multiple job listings:

- **Pull up ten job descriptions for your target role.** To do this, you can use job boards like Indeed, Glassdoor, and LinkedIn. Make sure the roles you select come from different companies, share similar titles, and are roles you would actually apply for. In each job description, you should be able to identify a section listing requirements for the role.
- **Combine all the job requirements.** To do this, create a new Google document and copy over all the required responsibilities from all ten job descriptions.
- **Order requirements based on appearance frequency.** Certain requirements will likely appear in multiple descriptions. The more commonly they appear, the more likely it is that they're essential for the role. Put the most frequently appearing requirements at the top of your list. For example, a requirement that appears in all ten descriptions would go at the very top.

After completing these steps, you should have a clearer picture of which requirements are most common and important for the role. You may also have questions:

- **Why do requirements differ across job descriptions?** One of the most common reasons for this has to do with overly general job titles, or job titles that don't necessarily communicate the specific scope of a given role at a particular company. For example, a program manager at one company might be focused on customer management, while at another company, the emphasis might be on project management. A Data Analyst might primarily use SQL at one company and Python at another. Because of these differences, it's important to look beyond job titles. This is why we recommend the process outlined above—to help ensure you're targeting the exact roles that are right for you—and that you understand the requirements for those exact roles.
- **Why are some requirements higher on my list than I thought they would be, while others I expected to see barely show up at all?** If you're surprised by your results, you may need to spend more time learning what the role really entails, as you may have some preconceptions about the role that require adjusting. You might also need to do additional research to ensure you're targeting the right roles in your job search.
- **How do I know if I'm really right for my target role?** It's perfectly normal to experience self-doubt at this stage of the process. Remember, this is a new career for you. You're not expected to know everything about the role, and it's likely that your existing skills and experience won't line up perfectly. The more you learn about the role, the better you'll understand what's required for success, and the more you'll know about how to prepare yourself for that success.

Create your professional inventory

For this next step, you can temporarily set aside the master list of role requirements you previously created. The focus here will be on your existing professional qualifications, and any other skills or experience you possess that might be relevant to your target role and of value to a potential employer.

To begin, assemble a comprehensive list of the following:

- **Technical (hard) skills.** These are skills relating to a specific task or situation such as programming, technical writing, project management, and more.
- **Non-technical (interpersonal) skills.** These are the skills that enable people to navigate their environment, work well with others, perform well, and achieve their goals. They include skills like communication, leadership, team management, and more.
- **Personal qualities.** These are positive attributes and personality traits such as being honest, having a good sense of humor, and being dependable. You can also include your professional interests on this list.
- **Education.** This includes any post-secondary education, certifications, or independent classes completed online or offline.

Tip: You do not need to limit your professional inventory to skills and qualities developed through professional experience. Consider any volunteer, extracurricular, or personal experiences that might help a hiring manager understand your capabilities.

Once you've created your inventory of skills and experience, you're ready to line these up against your requirements list.

Match your profile to the job requirements

The concluding step in this process is to match your profile to the job requirements. The goal here is to make it easy for any hiring manager to see why you're a great fit for their role. You'll accomplish this by learning what to emphasize and focus on in your search, on your resume, and during interviews.

To begin, go through your professional inventory of skills and experience, highlighting each item in green, orange, or red, depending on its relevance to your target role. Relevance is determined by whether a given skill appears on your role requirements list, how high it appears on your list, and how directly it aligns with your list.

For example, let's say you're interested in a program manager role. If you're skilled at using project management software, and project management software skills are high on your job requirements list, then highlight that item in green. If you have some experience with tools that do not consistently show up on job descriptions but could still be relevant, highlight these skills in orange.

- **Green** should be used for skills that are directly relevant to your target role. You should look for roles that emphasize these skills. You should also highlight these skills on your resume, and be prepared to discuss them in an interview.
- **Orange** should be used to identify those skills and experiences that are relevant for the role but not necessarily in a direct way. These are generally your transferable skills—skills that you bring with you from past experiences that can help you succeed in your new role. Plan to have to explain these to recruiters and hiring managers, as their relevance may not be immediately evident.
- **Red** should be used for items that are not relevant for your job search. De-prioritize these skills, and steer clear of highlighting them on your resume and focusing on them during interviews.

Of these three categories, the orange items are where you'll need to focus extra attention. When it comes to transferable skills, you have to do the convincing, as you can't count on a recruiter or hiring manager making the connection. For example, no job description for a project manager role calls for waitstaff experience. However, that project manager job description will likely mention excellent communication skills—which you would have developed during your hospitality career. When applying for the project manager role, make sure your resume specifically mentions excellent communication in addition to listing “waiter” or “waitress” as your previous occupation. Once you've categorized your skills and experience based on how well they align with the requirements for your target role, you're ready to move your job search forward.

Weekly Challenge 4

1. Which of the following refers to how a company arranges its employee hierarchy, divides and coordinates job tasks, and enables members of the organization to relate to one another?

- Project Management Office (PMO)
- Authoritative structure
- Organizational structure
- Matrix organizational structure

 **Correct**

2. Which answer best describes a Classic organizational structure?

- It allows for easy communication among project teams that sit across different functions.
- It refers to how a company is arranged, how job tasks are divided and coordinated, and how members of the organization relate to one another.
- It involves reporting to stakeholders across teams in addition to direct managers.
- It refers to the traditional, top-down reporting structure with a clear chain of command.

 **Correct**

3. As a project manager, you believe limited access to the necessary people and equipment could cause the project to go past deadline. Which organizational topic could you discuss with your key stakeholder to get the project back on track?

- Resource availability
- Meeting availability
- Stakeholder availability
- Report availability

 **Correct**

4. Define organizational culture.

- A company's schedule and plans
- A company's income and expenses
- A company's structure, hierarchy, and goals
- A company's shared values, mission, and history

 **Correct**

5. How can project managers navigate organizational culture while working on projects? Select all that apply.

- By understanding their impact

 **Correct**

- By creating a Project Management Office (PMO)

- By making observations

 **Correct**

- By asking questions

 **Correct**

6. Which of the following statements is true of the change management process? Select all that apply.

- It follows Waterfall methodology principles.
- It requires effective communication from the project manager.

 **Correct**

- It is the sole responsibility of the project manager.

- It includes the successful delivery and adoption of a completed project.

 **Correct**

7. Which of the following change management tools are designed to visualize your stakeholder input?

- A scatter plot
- Culture mapping
- Feedback mechanisms
- Flowcharts

 **Correct**

8. As someone interviewing for a project management role, you want to understand the organizational culture of the company you're interviewing with. Which of the following questions could help you learn about the company's processes? Select all that apply.

- How many new projects does the company expect for this year?
- How do employees measure the impact of their work?

 **Correct**

- How might the person in this role contribute to the organization's mission?

 **This should not be selected**

Please review [the reading on learning about an organization's culture](#).

- How are new employees onboarded?

 **Correct**

9. As a project manager, you want to integrate change management into your project. You do this by ensuring stakeholders are aware of the upcoming changes. You introduce the deliverable to stakeholders by hosting a demonstration and a question and answer forum. These actions represent which change management best practice?

- Be proactive
- Use tools
- Follow a consistent process
- Practice empathy

 **Correct**

10. What action should a project manager take to ensure effective project governance?

- Take on projects without sufficient resources to push the team beyond their perceived capabilities.
- Elicit the input of senior stakeholders since they are decision makers.
- Treat project governance as separate from corporate governance.
- Prioritize governance trends over the organization's specific needs.

 **Correct**

Glossary - Terms and Definitions

A

Agile: A project management approach in which project phases overlap and tasks are completed in iterations

Authority: Refers to one's ability to make decisions for the project that impact the organization

B

Barrier: Something that can get in the way of project progress

Buzzword: A word or phrase that is popular for a period of time or in a particular industry

C

C-Suite: All the “chief” level officers in an organization

Change agent: A person from inside an organization who helps the organization transform by focusing on improving organizational effectiveness and development

Change management: The process of delivering a completed project and getting people to adopt it

Classic structure: An organizational structure with a traditional, top-down reporting hierarchy

Closing: The phase at the end of a project during which team members' work is celebrated and how the project went is evaluated

Contract work: Work done for a company by non-employees on a project-by-project basis

Corporate governance: The framework by which an organization achieves its goals and objectives

Cross-functional team: Team members who have different skill sets and may even work in different departments but are all working towards the successful completion of a project

Culture mapping: A tool that can illustrate a company's culture and how the company's values, norms, and employee behavior may be affected by change

D

Delegation: Assigning tasks to individuals or resources who can best complete the work

Deliverable: A specific task or outcome

DMAIC: A strategy for process improvement; refers to the five phases in the Lean Six

Sigma approach: define, measure, analyze, improve, and control

E

Effective communication: Refers to being transparent, upfront with plans and ideas, and making information available

Escalation paths: Refers to the courses for communicating risks to the right people at the right time

Executing: Completing the tasks necessary to achieve the project goals

F

Feedback mechanism: A tool that can capture input from stakeholders, such as a survey

Floating task: A task for which a change in its delivery would not affect the project's overall success or impact its timeline

Flowchart: A tool that can visualize a project's development process

Functional manager: The leader of a department in a functional (Classic) organization

Functional organizations: An organization divided into departments based on function; also called a Classic organization

G

Governance: The management framework within which decisions are made and accountability and responsibility are determined

I

Influencing without authority: Refers to a project manager's ability to guide teammates to complete their assigned work without acting as their direct managers

Initiation: The project phase that is the launchpad for the entire project; project goals, deliverables, resources, budget, and people are identified at this stage

Internship: A short-term way to get hands-on experience in an industry

Interpersonal skills: The behaviors used to interact with others; skills than can help one influence without authority, including communication, negotiation, conflict mediation, and understanding motivations

Iterative: Refers to phases and tasks that overlap or happen at the same time that other tasks are being worked on

K

Kanban: An Agile approach and a tool that provides visual feedback about the status of the work in progress through the use of Kanban boards or charts.

L

Lean: A methodology in which the main principle is the removal of waste within an operation

Lean Six Sigma: A combination of two “parent” project management methodologies: Lean and Six Sigma; used for projects that have goals to save money, improve quality, and move through processes quickly

Linear: A project structure in which the previous phase or task has to be completed before the next can start

M

Matrix structure: A hybrid organizational structure that is like a grid; includes direct higher-ups to report to, as well as stakeholders from other departments or programs

Mission: Clarifies what the “what,” “who,” and “why” of the organization

O

Organizational culture: Employees’ shared values and the organization’s values, mission, history, and so on; a company’s personality

Organizational structure: The way a company or organization is arranged

Ownership: When people feel like they are empowered to take responsibility for the successful completion of their tasks

P

Planning: Making use of productivity tools and creating processes; creating and maintaining plans, timelines, schedules, and other forms of documentation to track project completion

Program manager: A project manager who manages multiple projects for specific products, teams, or programs

Project: A unique endeavor which usually includes a set of unique deliverables; a series of tasks that need to be completed to reach a desired outcome

Project governance: The framework for how project decisions are made

Project life cycle: The basic structure for a project; consists of four different phases:

initiate the project, make a plan, execute and complete tasks, and close the project

Project management: The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements

Project management methodology: A set of guiding principles and processes for owning a project throughout its life cycle

Project management office: An internal group at a company that defines and maintains project management standards across the organization

Project manager: Individual who shepherds projects from start to finish and serves as a guide for their team, using their impeccable organizational and interpersonal skills every step of the way

Project task: An activity that needs to be accomplished within a set period of time by the project manager, the project team, or the stakeholder

R

Reporting chart: A diagram showing the relationships among people and groups within the organization and who each person or group reports to

Resource availability: Knowing how to access the people, equipment, and budget needed for a project

Resources: Anything needed to complete a project, such as people, equipment, software programs, vendors, and physical space or locations

Retrospective: A workshop or meeting with the project team to note best practices and learn how to manage a project more effectively the next time

Risk: A potential event which can occur and have an impact on a project

S

Scrum: An Agile framework that focuses on developing complex projects through collaboration and an iterative process. Work is completed by small, cross-functional teams led by a Scrum Master and is divided into short Sprints with a set list of deliverables.

Six Sigma: A methodology used to reduce variations by ensuring that quality processes are

followed every time

Sprint: A phase in the Agile project management approach which has a defined duration with a set list of deliverables

Stakeholder: People who are interested in and affected by the project's completion and success

Steering committees: A group that decides on the priorities of an organization and manages the general course of its operations

T

Transferable skill: An ability that can be used in many different jobs and career paths

U

Urgency: Getting team members to understand that the project is important and to identify what actions need to be taken to move the project along

V

Values: Principles that describe how employees are expected to behave

W

Waterfall: A project management methodology that refers to the sequential ordering of phases