Ice breaker! – If it's true for you, type your name in the box

has been in their current job for less than 2 years	speaks more than one language	attended a formal driver's education class when learning how to drive	prefers to listen rather than to talk	subscribes to more than 10 podcasts
has been told they have a great speaking voice	enjoys outdoor sports	reads books on a kindle, nook, or other tablet device	has facilitated more than 10 virtual classes	has more than one pet
originally from a country, state or town that begins with A-E-I-O-U	enjoys cooking, grilling or baking	has seen a movie in the last month	knows how to juggle	enjoys singing or acting
usually has a neat and organized desk	can type faster than 50 WPM	grew up in a small town	drinks coffee every day	uses a headset when talking on the phone

2

Our Guidelines for Online Success

- Actively participate!
- You'll get the most out of the program if you engage and contribute.
- Please close out of your email, Skype, and other programs so that you can focus here.
- Be prepared to be called upon and asked to contribute.

About Shawn

Director, Talent Solutions @ **RBC**

Program Director @ **Human Learning Institute, Canadian Centre for Brief Coaching** for the Masters Certificate in Adult Learning & Workplace Education

Volunteer Disciplined Agile Champion @ **Project Management Institute Lakeshore Ontario Chapter**

ICP-BAF CERTIFIED PROFESSIONAL

KANBAN SYSTEMS DESIGN (KMP I)

CO-ACTIVE TRAINING INSTITUTE Foundations

Scrum Alliance CSM CERTIFIED

PMP

SSM SAFe 4

UNIVERSITY OF TORONTO OISE | ONTARIO INSTITUTE FOR STUDIES IN EDUCATION Brief Coaching

EBAS

CTDP Certified Training Development Professional THE INSTITUTE FOR PERFORMANCE AND LEARNING

ICF International Coaching Federation Member

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Agenda

Session 1

- Project characteristics and your responsibilities
- Determining what is required and who will execute the work
- Building an effective schedule with a budget

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What is a Project?

And how does it differ from your everyday tasks?

6

A quick poll!

- "your team meets every month to review work performance, and discuss ideas for improving the workflow"
- "at one of these monthly meetings, you make the point that within your department, you find the decision-making process for certain activities lacks clarity, upper management agree, and now you find yourself tasked with establishing a set of more workable processes for your team to follow"
- "during one of your HR department's monthly meetings, a recommendation is made for the company to spend more time and resources to improve employee onboarding. The team believes that new employees need to better understand the company goals and workflows, and how their respective jobs align with the company's key initiatives. Upper management sign off on the idea"

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What's PMI's definition of a project?

- it's a temporary endeavor undertaken to create a unique product, service or result.
- a project is **temporary** in that it has a defined beginning and end in time, and therefore defined scope and resources.
- a project is **unique** in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal.
- a project team often includes people who don't usually work together – sometimes from different organizations and across multiple geographies.

8

What is Project Management?

Project management, then, is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

Project management processes fall into five groups:

Project management knowledge draws on ten areas:

1. Integration
2. Scope
3. Time
4. Cost
5. Quality
6. Procurement
7. Human resources
8. Communications
9. Risk management
10. Stakeholder management

9

Where do projects come from?

- **Financial considerations** are often the reason for undertaking projects in business
  - increased revenues
  - improved profit margins
  - cost savings
  - tax considerations
  - market volatility
- Another tangible reason for undertaking a project is to **create a new asset**
- **Customer demand** is another powerful business reason for undertaking a project
- Business reasons can also be intangible
  - **improving employee morale**
  - **better brand recognition**
  - **creating customer goodwill**

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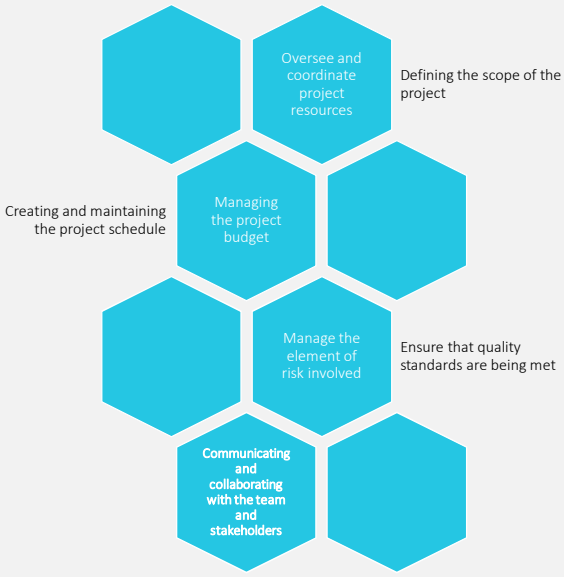
What are your key responsibilities as a PM?



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You're not alone, where can I find support?

Managing a project for the 1st time or anytime can be overwhelming! A lot of…

- responsibilities
- people looking to you for guidance
- weight on your shoulders

You're not required to be the expert for everything!

- leverage the expertise that sit within your team
- senior management often provide the direction and guidance you'll need
- in-house experts, even if they aren't available to join your team directly, can be consulted or borrowed short term to lend their expertise to your team
- specialized knowledge or resources that can't be sourced internally, you can turn to external vendors

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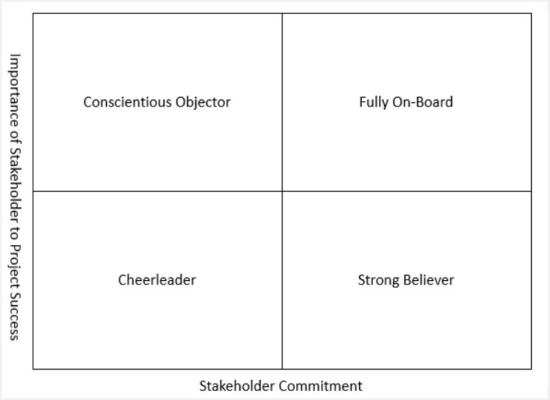
Project Stakeholders

- Who's invested in the project?
- What's their impact to the project's success?
- What can you do with this information?



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What is the project's scope?

- Good preparation is key to any project
- Before you do anything else, it's important to **develop a clear vision** of what the project needs to achieve and **how** it will achieve it.
- This means clarifying from the outset
  - what stakeholders are expecting
  - what tasks need to be completed
  - ensuring the resources and personnel required are in place

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Techniques for determining requirements

- requirements can include functional, performance, safety, compliance, and more. And they can be difficult for some to articulate
- conduct one-on-one interviews with project stakeholders
- hold facilitated workshops, which are perfect when you need to have all the stakeholders together in one place
  - facilitated workshops are interactive
  - they enable stakeholders from different functional areas of the organization, to arrive at a set of requirements that everyone can agree on
  - these can include brainstorming, which is a useful technique that encourages stakeholders with different perspectives to come up with ideas and more importantly, to share ideas
  - focus groups are another way to kick-start a discussion about the features that the product or service must deliver
- for answers fast and from many people, questionnaires and surveys are useful

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Break it down to get it done

Large>>Medium>>Small

- when confronted with a challenging or daunting task, you break it into smaller, more manageable pieces, and work your way through them one at a time
- this approach to a project is known as a work breakdown structure. It's a deliverable oriented breakdown of a project into smaller pieces.

The project scope

- the scope is the basis for determining how best to divide your resources, costs, and time

A picture is worth a 1000 words

- because this is visual, it makes it easier to keep track of the bits and pieces

Keep it up to date

- once you've created it will keep you on track throughout the project and with any project, that's half the battle won

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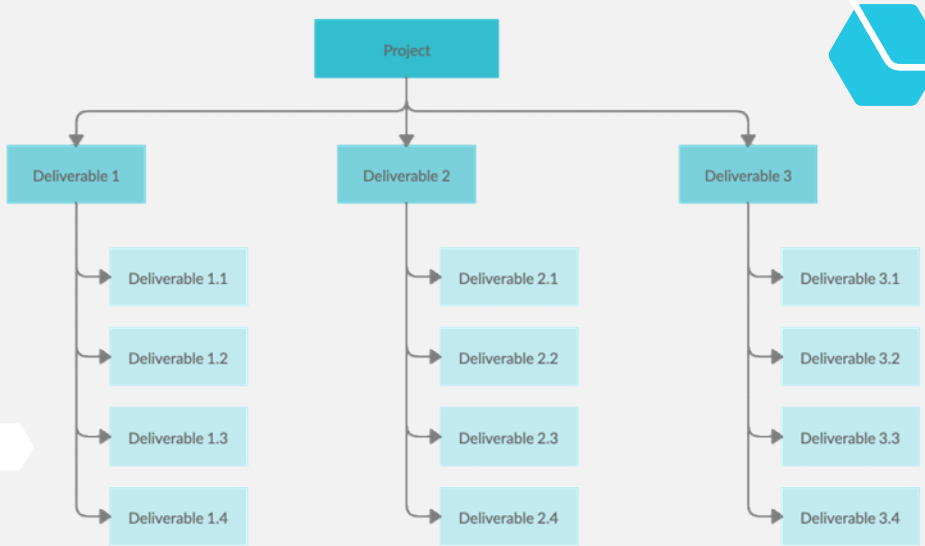
Break it down to get it done



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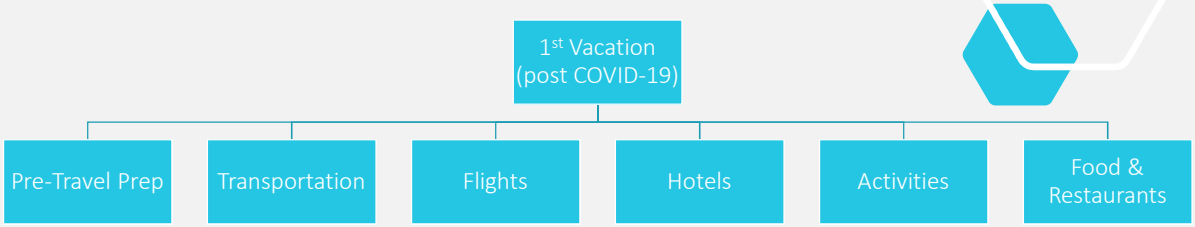
Let's try this out…



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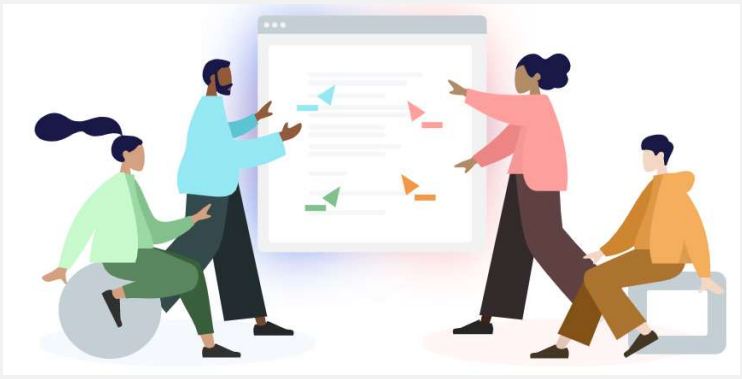
Aligning Resources



What do I need to get the job done?

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Resource considerations

A good starting point in determining needed resources is your work breakdown structure, which clearly identifies the tasks required to achieve the project's deliverables.

The types of resources required could include people, materials, facilities, equipment, funds,

Be sure, of course, to include estimates for anything you might have to outsource to. Then you simply add it all together to get a total estimate of your overall project resource requirements. And from this, you can allocate your overall budget and schedule

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Building the team

- It's about getting the right people into the right positions, to do the right jobs.
- A good team is more than the sum of the individuals that comprise it.
- What are the steps required to build an effective project team?
  - identify the skill sets needed for each activity
  - identify candidates with the requisite skillsets
  - determine resource availability
  - assign responsibilities (RACI)

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Building the team

Example RACI Chart

Project Deliverable (or Activity)	Project Manager	Strategist	Designer	Front End Developer	Back End Developer
Design site map	C	R	A	I	I
Design wireframes	C	A	R	I	I
Create style guide	A	C	R	C	I
Code templates	A	I	C	R	C

Responsible
The team member who does the work to complete the task

Accountable
The person who delegates work and provides final review on a task or deliverable before it's deemed complete

Consulted
People who provide input on a deliverable based on the impact on their work or their domain of expertise

Informed
People who need to be kept in the loop on project progress

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Team dynamics

Tuckman Ladder or stages of team development

Forming
This is when the team first gets together, Team members are positive and polite.
There's excitement about the task ahead, but some anxiety too.

Storming
conflict emerges between team members differing approaches,
or when there are personality clashes

Norming
team members have learned how to work together, they're able to resolve differences, and they recognize one another's strengths.

Performing
Productivity is high, conflict is low, and everything and everyone is working well together toward the common goal

Adjourning
The project is over and it's time for team members to go their separate ways with contacts made and lessons learnt

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Creating a Project Schedule and Budget

- The ability to complete a project on time, and within budget, is vital in today's demanding business environment.
- But with so many interrelated and evolving components, delivering a project that meets your goals is no easy feat.
- That's why, determining how much time and money you'll need, is key

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Estimation Techniques

Analogous estimating	Parametric estimating	Bottom-up estimating
• using estimates from a previous similar project as the basis for your current one	• use very similar, repeatable variables to estimate the project duration or cost	• divide the project into small manageable activities or deliverables • create an estimate for each activity or deliverable • add up all the individual estimates to get your total project estimate

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Creating a project network diagram

- You've probably heard of the domino effect.
  - One single event that sets off a chain reaction of similar events that can have either positive or more likely, negative consequences.
- In project management, this initial event sometimes takes the form of a task that misses its deadline, with the domino effect of a project being delivered late or running over budget

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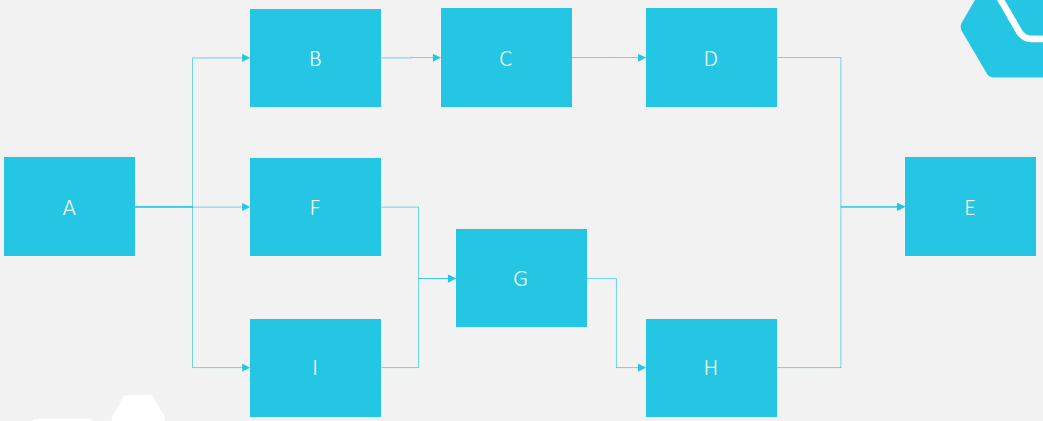
Creating a project network diagram



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Effort vs Duration

- **Effort** (also referred to as Work) is the actual time required to complete the task.
- **Duration** is the total amount of time in which the user has to complete the task.
- For example, you might have a task that only takes 2 hours to physically complete, but that task can be completed anytime over the next week.

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Gantt Chart View

Task relationship:
FS – Finish to Start

Consider:
- Longest path
- Lead time
- Lag time

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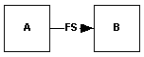
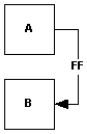
Task dependencies (Wikipedia)

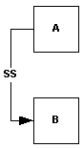
1.Finish to start (FS)
A FS *B* means "activity A must finish before activity B can begin" (or "B can't start until A has finished")
(Foundations dug) FS (Concrete poured)



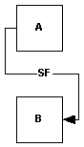
2.Finish to finish (FF)
A FF *B* means "activity A must finish before activity B can finish" (or "B can't finish before A is finished")
(Last chapter written) FF (Entire book written)



3.Start to start (SS).
A SS *B* means "activity A must start before activity B can start" (or "B can't start until A has started")
(Project work started) SS (Project management activities started)



4.Start to finish (SF)
A SF *B* means "activity A must start before activity B finishes" (or "B can't finish until A has started")
(New shift started) SF (Previous shift finished)



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Managing the schedule

- Identify the critical path (the longest path), any delays on this path will delay the overall project
- Monitor progress at the task/phase level
- Consider the resources assigned to specific tasks,
  - Stat Holidays
  - Vacations
  - Unplanned events
  - Skill level

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Creating the budget

A budget is like a financial blue print

- calculate your project cost estimates
  - analogous
  - Parametric
  - bottom-up estimating
- add up all the individual estimates to get your total project cost estimate
- add your contingency reserves - Risk response plan
- project cost estimates + contingency = total project budget
- create a baseline to better track variances

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DANKE!
THANK YOU!
GRAZIE!
ThankYou
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