

Welcome to BTM 260: Project Management (5 Cr)

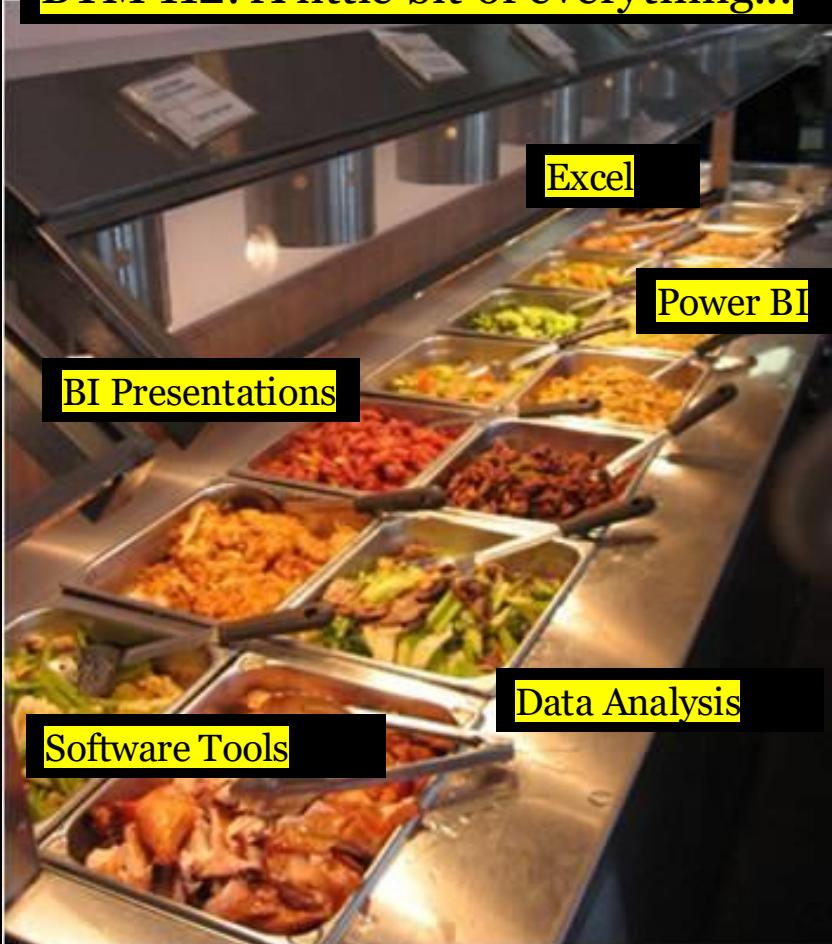


Course Description:

- Overview of project management from a business and IT perspective, including project estimation, feasibility, planning, risk management, contingency planning, scheduling, control and Agile project methodology.
- Examine and evaluate project planning techniques, budget estimation, resource allocations, critical path dependencies, risk management, contingency planning, implementation, and evaluation; and complete a project.

Key Differences between BTM 119 and BTM 260

BTM 112: A little bit of everything...



BTM 260: A specific, precise, and pre-determined menu...

MANGIA NASHVILLE

FACEBOOK /MANGIANASHVILLE

SPRING MENU

ANTIPASTI

FRIED GREEN OLIVES STUFFED WITH FRESH MOZZARELLA
UOVA ALLA DIAVOLA - ITALIAN DEVILED EGGS
BRUSCHETTA OF HOUSE MADE RICOTTA, SPRING PEAS + FRESH MINT
LEMON RISOTTO CAKES WITH MANGIA MAYO

INSALATA

CLASSIC CAESAR SALAD WITH HOUSE MADE HERBED CROUTONS + DRESSING
SPRING GREENS WITH SHAVED FENNEL, FRESH ORANGE SEGMENTS

PASTA

SHELL PASTA WITH BEEF SHORT RIB BOLOGNESE
FARFALLE PASTA WITH ASPARAGUS + TOASTED PECAN BASIL PESTO CREAM SAUCE

ENTRATA

PORCINI DUSTED BEEF TENDERLOIN WITH TRUFFLED CRIMINI MUSHROOMS
ROSEMARY LEMON CHICKEN
ROASTED VEGETABLE

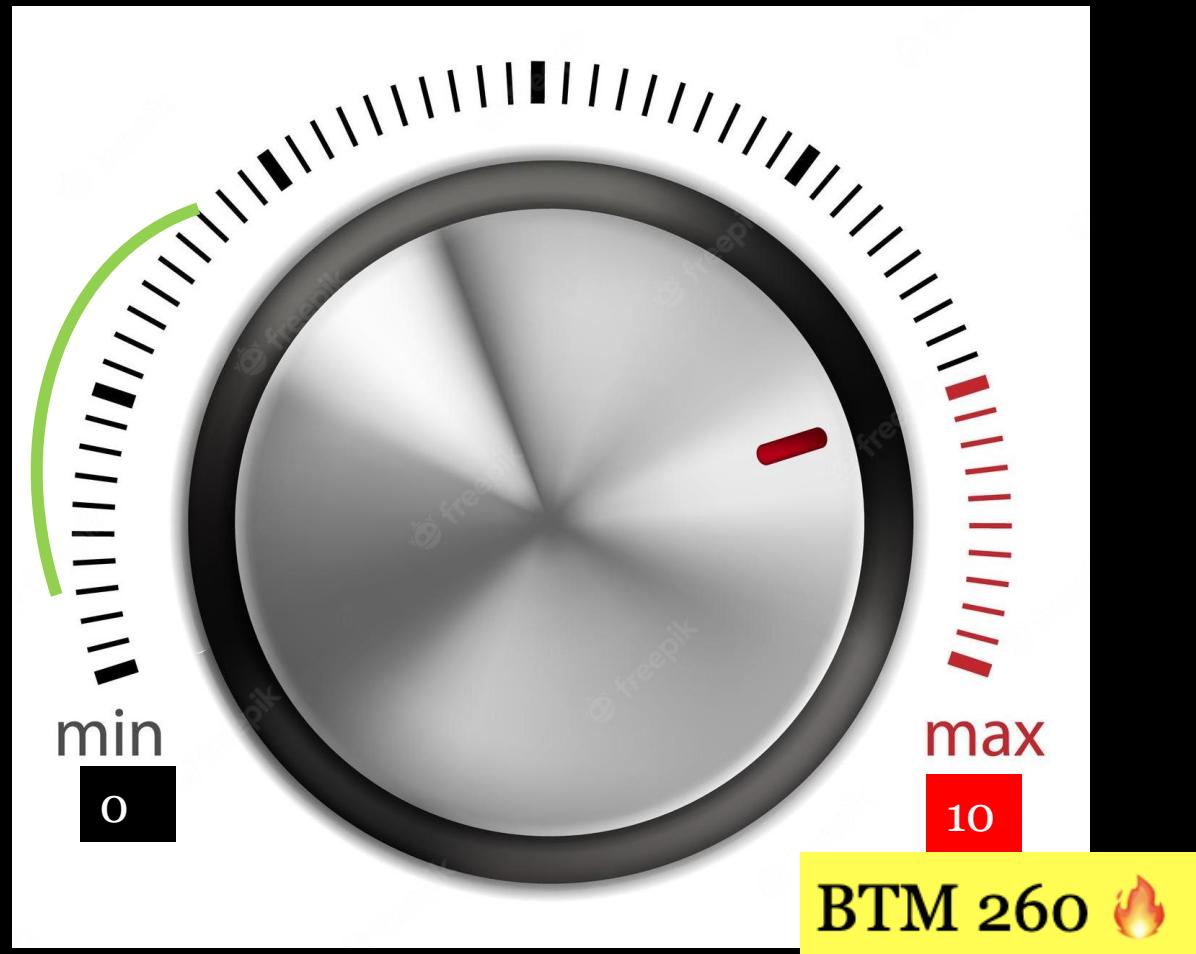
DOLCE

LIMONCELLO SEMIFREDDO
ZEPPOLE

GLUTEN FREE BY REQUEST

PLEASE NOTIFY US WHEN MAKING YOUR RESERVATION

COOL CAFE • 1110 HILLSBORO ROAD • SUITE B200 • FRANKLIN, TN 37064



Degree of Difficulty

BTM 260: Project Management has a higher degree of difficulty. The most successful students demonstrate these leadership traits:

- Proactivity versus Passivity: this means questions are asked, camera is on, and participation is consistent
- A Courage to Learn (versus Fear of Not Knowing): 75 percent of this class is this feeling unsure what to do
~~~~~  
Get over it. Quickly.
- Ownership versus Blame: Mistakes will happen, communication will break down, and team conflict will arise. This is being an adult. Adapt. Quickly.

# We're Here to Work

- **Micro Activities** will be randomized assignments to track your participation
- **Zoom Reports** are sent to Shelby weekly to track your login/log off times in class
- **Camera on** is required every class (see exceptions in the Syllabus)
- This class operates like an internship or job, or “**on the clock**,” meaning if you’re here, you’re here to work



# Course Syllabus

- What's the same?
- What's new?

# Course Layout

What's the same?

- Expectations w/ deadlines
- No extensions

What's new?

- My expectations with work quality is higher
- Learning and using Project Management acumen is expected





## Pace Yourselves

This first month of class is lecture heavy, so find ways to pace your attention spans.

Invest in fidget spinners, putty, or other hands-on resources to relieve any fidgeting.

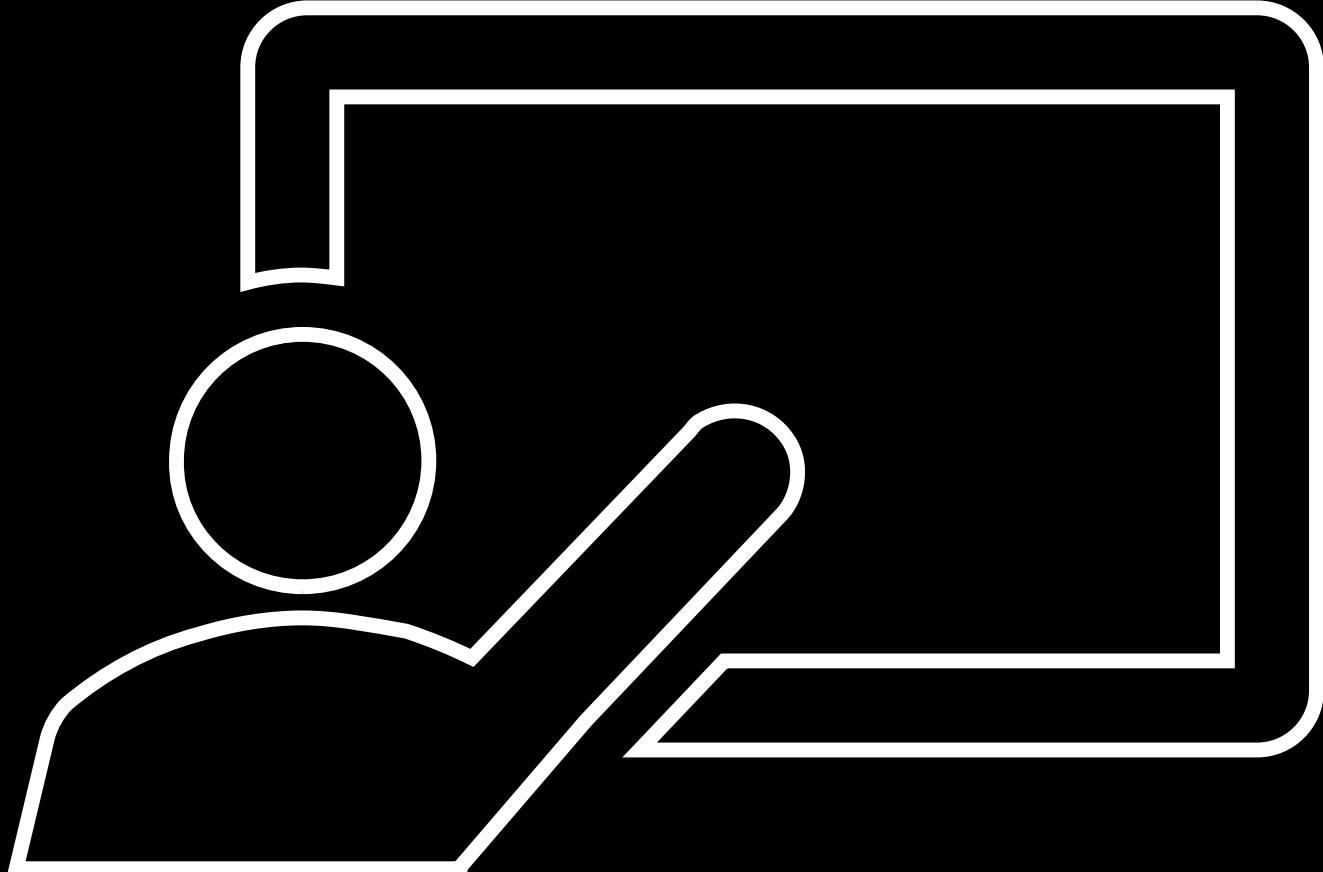
# Recommended but Not Required



Standing Desk Arrangement



Extra Screen



## Resource Lecture

Each student will deliver a resource lecture between 9 - 12 minutes in length covering any *useful* aspect of project management. Topics can include:

- project management theory or best practices
- current industry trends
- software tools/live tutorials, literature/research
- or other resources.

More info to come.

# Bi-Weekly Quizzes



Learn more about the PM certification:  
<https://www.comptia.org/certifications/project>

3. You have completed the project charter and business case for a new project. In which phase of project management are you working?
  - a. Planning
  - b. Initiating
  - c. Executing
  - d. Closing
  
4. Which of the following are created during the Planning phase of a project?
  - a. Budget and schedule
  - b. High-level requirements and risks
  - c. Deliverables
  - d. Changes
  
5. For a project you are managing, you have documented several issues that arose after you reviewed the project deliverables. As a result, you identified a new risk. In which project phase are you engaged?
  - a. Executing
  - b. Monitoring and Controlling
  - c. Planning
  - d. Closing
  
6. You are documenting the lessons learned for a project that researched a new product line for your company. You release the project resources and obtain project sign-off from the project sponsor. Which project phase are you completing?
  - a. Initiating
  - b. Planning
  - c. Closing
  - d. Executing

**Hint: Take Notes During Class!**

# www.Notion.so

Too many tools? Too much chaos? With *Notion*, all your work is in one place. Get started for free. Hassle-free wiki software. Better shared docs. All your projects tracked. Infinite flexibility.

FREE! FREE! FREE!

A screenshot of the Notion sidebar. On the left, there's a vertical list of pages and sections. The 'Quick Note' section is highlighted with a grey background and a red icon. Other items in the list include 'Goals', 'Roadmap', 'Get Started on Mobile', 'Untitled', 'Add a page', 'Templates', 'Import', and 'Trash'. The rest of the interface is white.

Add cover Add comment

## Quick Note

Quickly create a rich document.

### Jot down some text

They found Mary, as usual, deep in the study of thorough-bass and human nature; and had some extracts to admire, and some new observations of threadbare morality to listen to. Catherine and Lydia had information for them of a different sort.

### Make a to-do list

- Wake up
- Eat breakfast
- Brush teeth

### Create sub-pages

Sub Page

### Embed links

Beyond Frank Lloyd Wright: A Broader View of Art in Chic...

"We had been aware of the Walker exhibit but hadn't quite known how to connect," said Steve Weaver, executive director of the

<https://www.nytimes.com/2018/03/08/arts/chicago-museums-a...>



# Microsoft's OneNote

A digital notebook for all your notetaking needs.

The screenshot shows the Microsoft OneNote application interface. At the top is a ribbon bar with tabs: Home, Insert, Draw (which is selected), and View. Below the ribbon are various drawing tools: Text Mode, Lasso Select, Insert Space, Eraser, Pen, Marker, Highlighter, Ink Colour (with black, blue, green, red options), and a line thickness slider from 0.25 mm to 1 mm. On the left, there is a sidebar menu titled "Psychology" with a search icon. Under "Psychology", there is a list of topics: Basic, Society, Culture, Positive Psy, Biological, Statistic, Personality, Developmental, Education, and Health. The "Basic" topic is currently selected. To the right of the sidebar is a hand-drawn diagram of a human brain. The diagram labels include: FRONTAL LOBE (pink), MOTOR CORTEX (yellow), CENTRAL SCLCUS (green), OCCIPITAL LOBE (purple), CEREBELLUM (blue), AUDITORY CORTEX (orange), and SPINAL CORD (red). Below the brain diagram, the name "Curtis" is written in pink ink, and "CHAN CHUN TSONG" is written in brown ink at the bottom right.



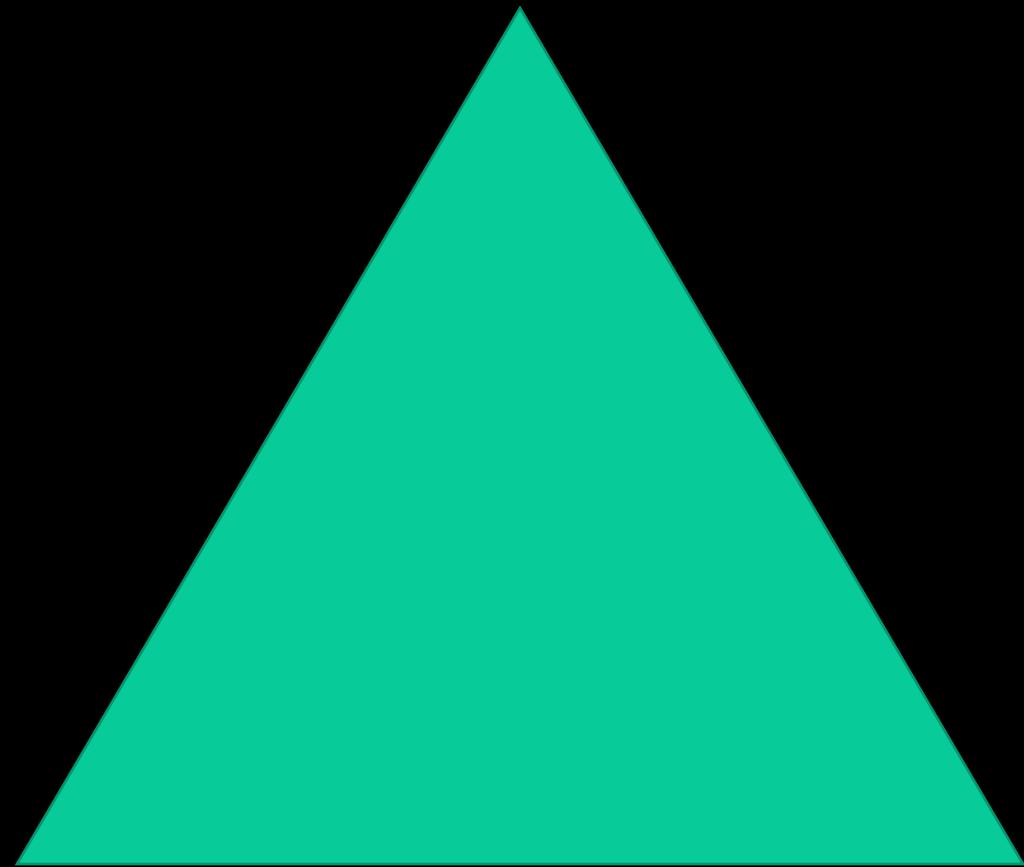
# Learning Objectives

- Understand the difference between project, product, and program management
- Define "project"
- Define "program" and "portfolio"
- Identify the 5 phases of project management
  - Initiating
  - Planning
  - Executing
  - Monitoring & Controlling Phase
  - Closing

# The Three Ps

## **PROJECT Management**

- work is temporary. Example: every profession



## **PROGRAM Management**

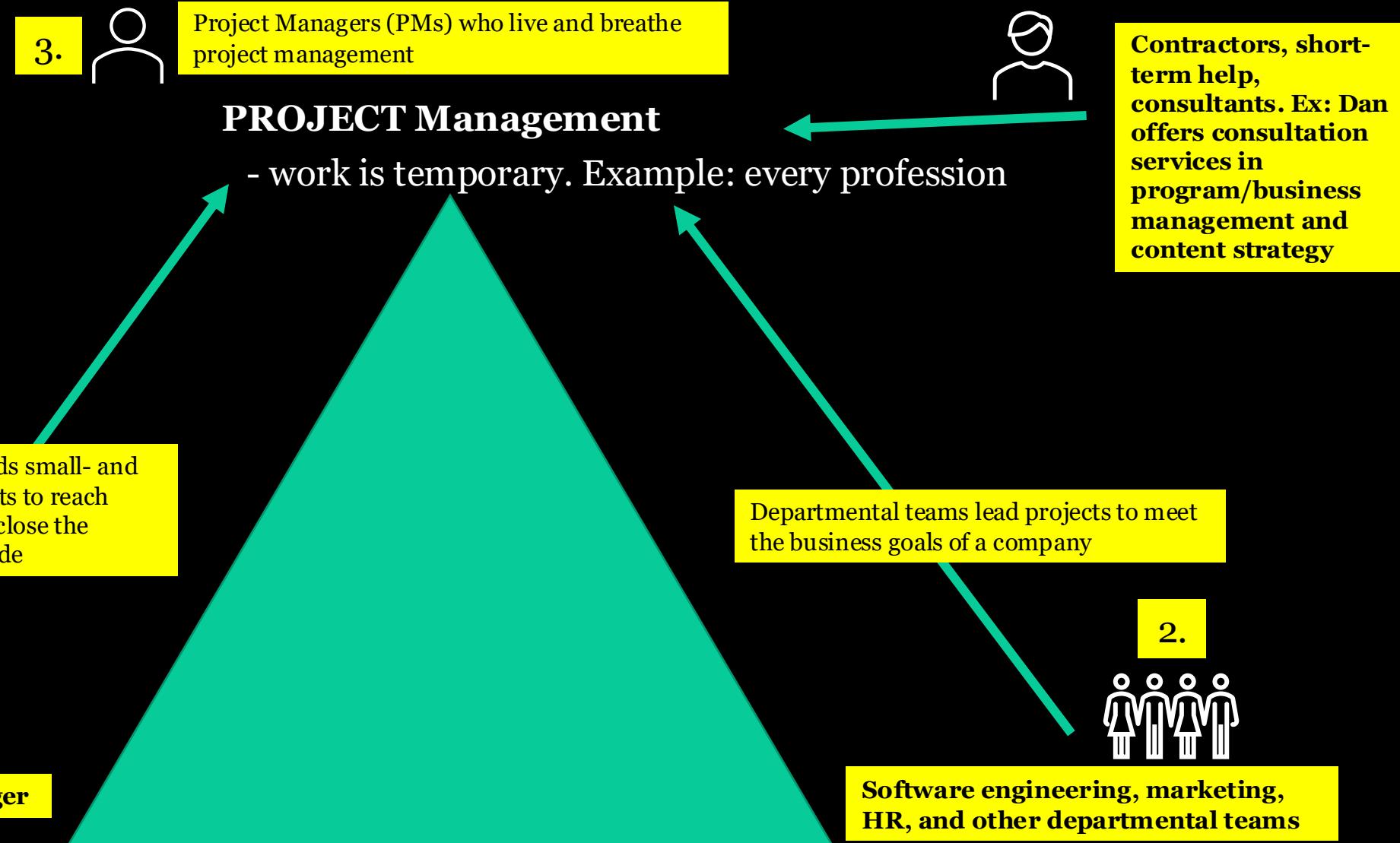
- long term planning and mission-driven  
Example: nonprofit organizations like Year Up

## **PRODUCT Management**

- delivering products or services that solve  
problems permanently. Ex: Computer Software

# The Three Ps

Most examples in this class will explore the day in the life of Product Teams, PMs and Contractors/Consultants.



1.

**Shelby, YU Program Manager**

## PROGRAM Management

- long term planning and mission-driven  
Example: nonprofit organizations like Year Up



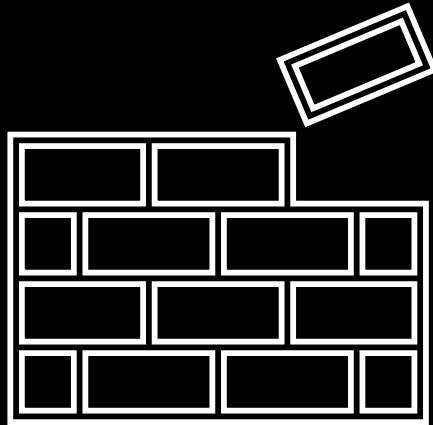
2.

**Software engineering, marketing, HR, and other departmental teams**

## PRODUCT Management

- delivering products or services that solve problems permanently. Ex: Computer Software

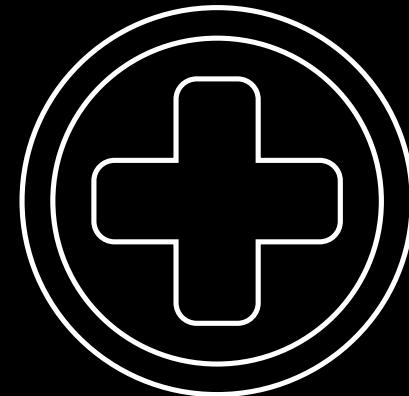
# Every Industry Has Projects



Construction/Engineering/Manufacturing



STEM-B



Human Resources/Client  
Management/Customer Service

Quiz Question: A project is temporary and has a defined beginning, end, scope, budget, and resources.



## Project Management isn't a Modern Invention

2570 BC - The Pharaohs built the pyramids, and today, archaeologists still argue about how they achieved this feat.

Ancient records show there were managers for each of the four faces of the Great Pyramid, responsible for overseeing their completion. We know there was some degree of planning, execution and control involved in managing this project. -  
[ProjectSmart.co](http://ProjectSmart.co)



# Project Management isn't a Modern Invention

Qin Shi Huang, the first emperor of a unified China under the Qin Dynasty (221BC-206BC), built another wonder of the world.

The emperor ordered millions of people to finish this project. According to historical data, the labour force was organised into three groups: soldiers, ordinary people and criminals. [ProjectSmart.co](https://www.projectsmart.co)

# Histograms, charts, and other visual data

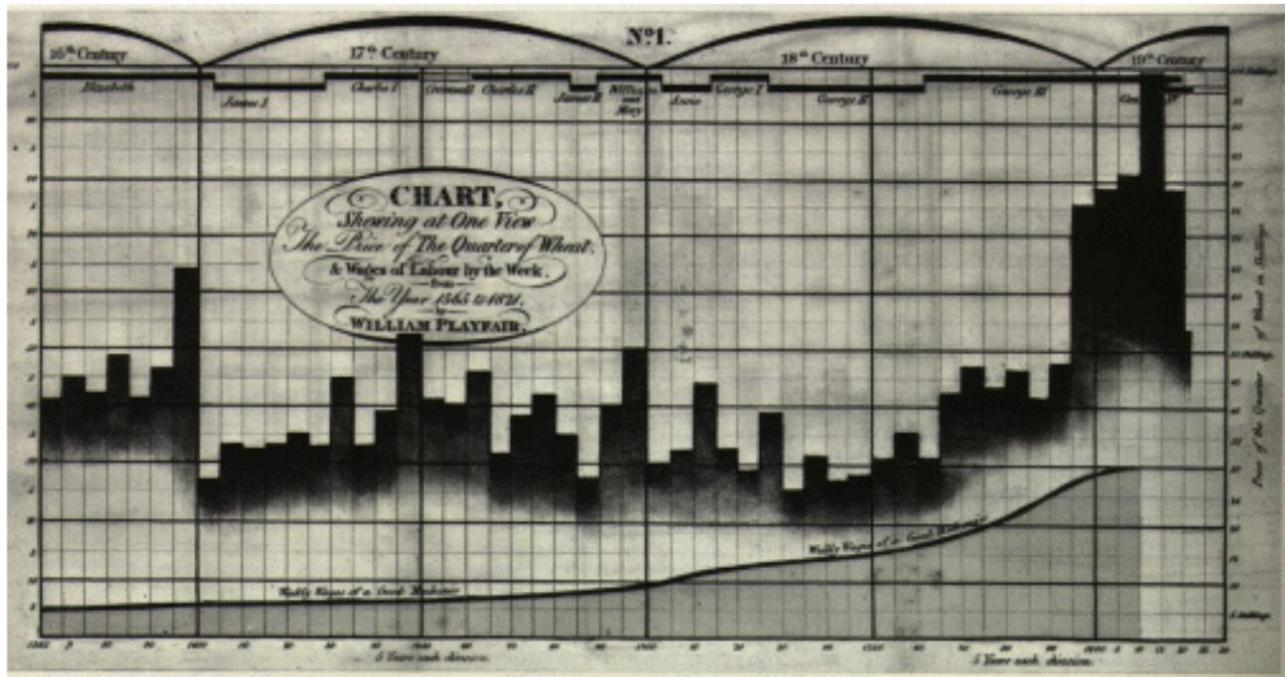


Figure 2 – One of Playfair's Charts from the 1801 edition of his Atlas

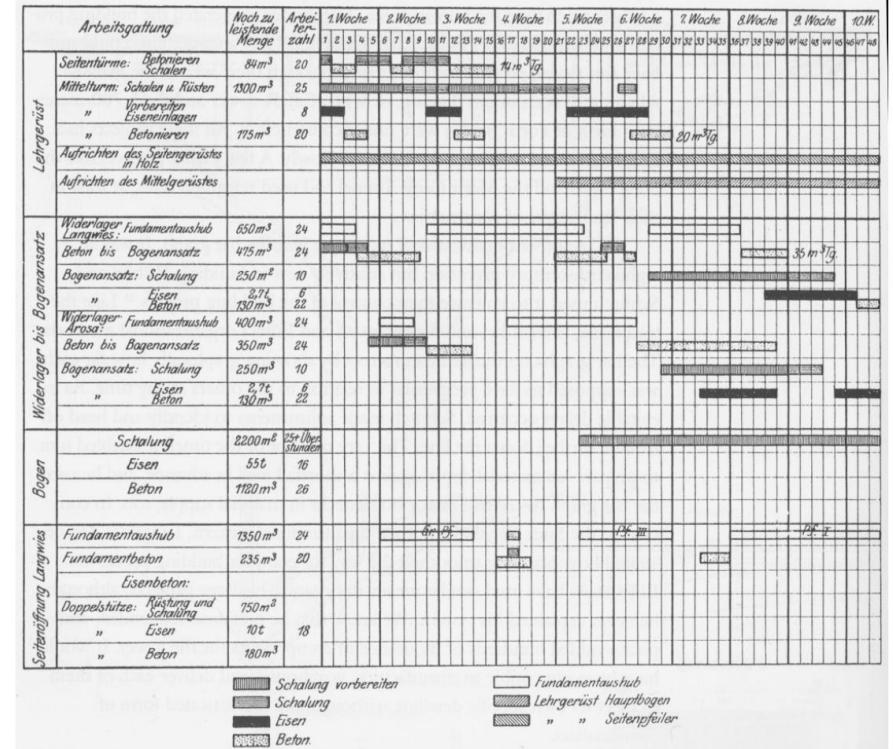
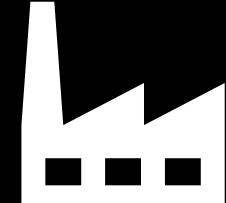


Figure 4 (Fig. 33 from the report): a Bar Chart developed for a bridge constructed in 1912.

# Engineering Projects Drive Project Management

## 1956: The American Association of Cost Engineers (now AACE International) Formed

Early practitioners of project management and the associated specialities of planning and scheduling, cost estimating, cost and schedule control formed the AACE in 1956. It has remained the leading professional society for cost estimators, cost engineers, schedulers, project managers and project control specialists since. AACE continued its pioneering work in 2006, releasing the first integrated process for portfolio, programme and project management with their Total Cost Management Framework.



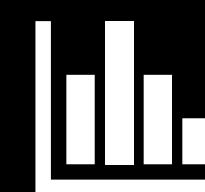
## 1957: The Critical Path Method (CPM) Invented by the Dupont Corporation

Developed by Dupont, CPM is a technique used to predict project duration by analysing which sequence of activities has the least amount of scheduling flexibility. Dupont designed it to address the complex process of shutting down chemical plants for maintenance, and then with the maintenance completed, restarting them. The technique was so successful it saved the corporation \$1 million in the first year of its implementation.



## 1958: The Program Evaluation Review Technique (PERT) Invented for the U.S. Navy's Polaris Project

During the Cold War, the United States Department of Defense's US Navy Special Projects Office developed PERT as part of the Polaris mobile submarine-launched ballistic missile project. PERT is a method for analysing the tasks involved in completing a project, especially the time needed to complete each task and identifying the minimum time required to complete the total project.



## 1962: United States Department of Defense Mandate the Work Breakdown Structure (WBS) Approach

The United States Department of Defense (DOD) created the WBS concept as part of the Polaris mobile submarine-launched ballistic missile project. After completing the project, the DOD published the work breakdown structure it used and mandated the following of this procedure in future projects of this scope and size. WBS is an exhaustive, hierarchical tree structure of deliverables and tasks that need to be performed to complete a project. Later adopted by the private sector, the WBS remains one of the most common and valuable project management tools.

# Critical Theory Advances Project Management

## 1969: Project Management Institute (PMI) Launched to Promote the Project Management Profession

Five volunteers founded PMI as a non-profit professional organisation dedicated to advancing project management practice, science, and profession. The Commonwealth of Pennsylvania issued Articles of Incorporation for PMI in 1969, which signified its official start. PMI held its first symposium in Atlanta, Georgia, attended by 83 people during that same year. Since then, the PMI has become best known as the publisher of 'A Guide to the Project Management Body of Knowledge (PMBOK)', considered essential tools in today's project management profession. The PMI offers two levels of project management certification, Certified Associate in Project Management (CAPM) and Project Management Professional (PMP).

## 1975: PROMPTII Method Created by Simpact Systems Limited

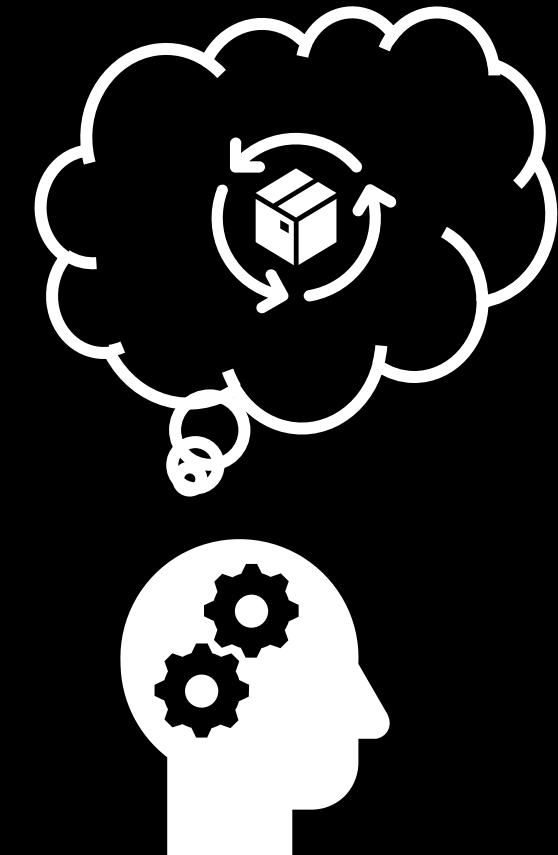
The development of PROMPTII was in response to an outcry that computer projects were overrunning on time estimated for completion and original budgets as set out in feasibility studies. It was not unusual to experience factors of double, treble or even ten times the original estimates. PROMPTII was an attempt to set down guidelines for the stage flow of a computer project. In 1979, the UK Government's Central Computing and Telecommunications Agency (CCTA) adopted the method for all information systems projects.

## 1975: The Mythical Man-Month: Essays on Software Engineering by Fred Brooks

In his book on software engineering and project management, Fred Brooks's central theme is that "Adding manpower to a late software project makes it later." This idea is called Brooks's law. The extra human communications needed to add another member to a programming team is more than anyone expects. It naturally depends on the experience and sophistication of the human programmers involved and the quality of available documentation. Nevertheless, no matter how much experience they have, the extra time discussing the assignment, commitments and technical details and evaluating the results becomes exponential as more people get added. These observations are from Brooks's experiences while managing the development of OS/360 at IBM.

## 1984: Theory of Constraints (TOC) Introduced by Dr Eliyahu M. Goldratt in his Novel "The Goal"

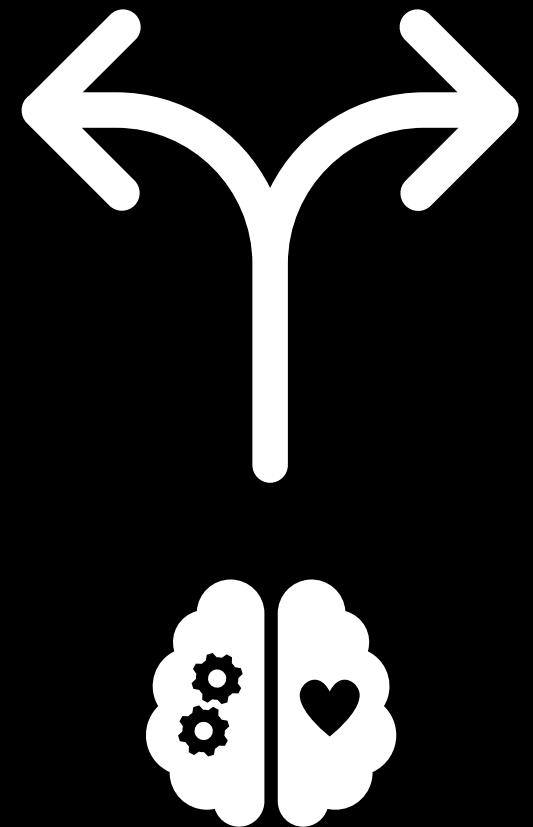
TOC is an overall management philosophy that is geared to help organisations continually achieve their goal. The title comes from the view that any manageable system is limited in achieving more of its goal by a small number of constraints, and there is always, at least, one constraint. The TOC process seeks to identify the constraint and restructure the rest of the organisation by using Five Focusing Steps. The methods and algorithms from TOC went on to form the basis of Critical Chain Project Management.



# The Birth of Methodologies

PMBOK

Agile



## 1986 Scrum Named as a Project Management Style

Scrum is an agile software development model based on multiple small teams working in an intensive and interdependent manner. In their paper, 'The New New Product Development Game' (Harvard Business Review, 1986), Takeuchi and Nonaka named Scrum as a project management style. Later they elaborated on it in 'The Knowledge Creating Company' (Oxford University Press, 1995). Although Scrum is intended to manage software development projects, it can be used to run software maintenance teams or as a general project and programme management approach.

## 1987: A Guide to the Project Management Body of Knowledge (PMBOK Guide) Published by PMI

First published by the PMI as a white paper in 1987, the PMBOK Guide was an attempt to document and standardise accepted project management information and practices. The first edition was published in 1996, followed by a second in 2000 and a third in 2004. The guide is one of the essential tools in the project management profession today and has become the global standard for the industry.

## 1989: Earned Value Management (EVM) Leadership Elevated to Undersecretary of Defense for Acquisition

The PMBOK Guide of 1987 outlines Earned Value Management (EVM) subsequently expanded on in later editions. Although the earned value concept has been around on factory floors since the early 1900s, it only came to prominence as a project management technique in the late 1980s early 1990s. In 1989, EVM leadership was elevated to the Undersecretary of Defense for Acquisition, thus making EVM an essential part of programme management and procurement. In 1991, Secretary of Defense Dick Cheney cancelled the Navy A-12 Avenger II Programme because of performance problems detected by EVM.

## 1989: PRINCE Method Developed From PROMPTII

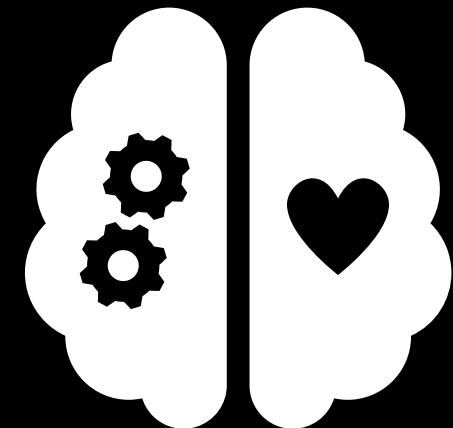
Published by the UK Government agency CCTA, PRojects IN Controlled Environments (PRINCE) became the UK standard for all government information systems projects. A feature of the original method, not seen in other methods, was the idea of 'assuring progress' from three separate but linked perspectives. However, the PRINCE method developed a reputation for being too unwieldy, rigid, and applicable only to large projects, leading to a revision in 1996.

# What is a METHODOLOGY

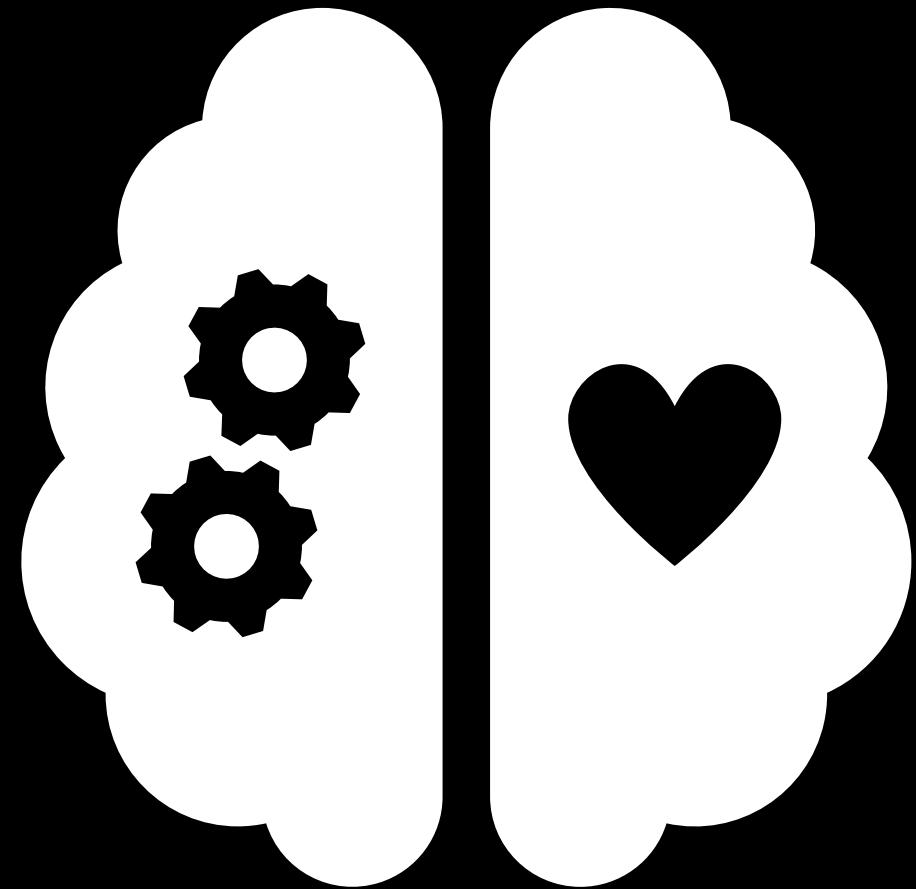
The term is not well defined either in the litterature or by practitioners, but here is some definitions

” a methodology is a collection of procedures, techniques, tools and documentation aids, supported by a philosophy, which will help the systems developers in their efforts to implement a new information system” (Avison and Fitzgerald)

”a set of principles of method which in any particular situation has to be reduced to a method uniquely suited to that particular situation ” (Checkland)



A methodology is a philosophy or way of thinking

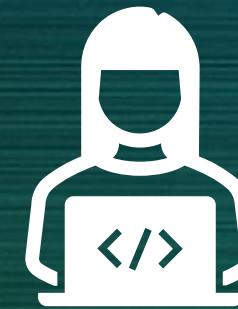


A methodology is a philosophy or way of thinking

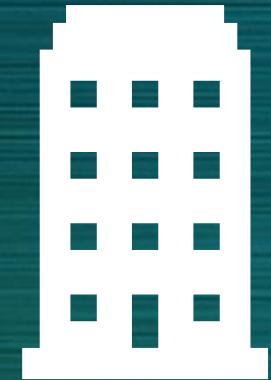
## Class Discussion

Why would we want to have different philosophies or ways of thinking in project management?

For example, how would coding a website differ than constructing a 20-story apartment building? Why should we think *differently* for those projects?



Vs.



# Project Management Methodologies

The project management journey comes in a variety of forms or methodologies depending on the project, industry, and/or company:

- Agile, Scrum, and XP are used for technical projects
- Lean is heavily used by the military and Amazon
- Waterfall and PMI's PMBOK are classic methodologies

For this quarter, we'll use two primary methodologies:

- PMBOK
- Agile

## 9 Popular Project Management Methodologies

1



**Agile** – collaborating to iteratively deliver whatever works

2



**Scrum** – enabling a small, cross-functional, self-managing team to deliver fast

3



**Kanban** – improving speed and quality of delivery by increasing visibility of work in progress and limiting multi-tasking

4



**Scrumban** – limiting work in progress like Kanban, with a daily stand up like Scrum

5



**Lean** – streamlining and eliminating waste to deliver more with less

6



**eXtreme Programming (XP)** – doing development robustly to ensure quality

7



**Waterfall** – planning projects fully, then executing through phases

8



**PRINCE2** – controlled project management that leaves nothing to chance

9

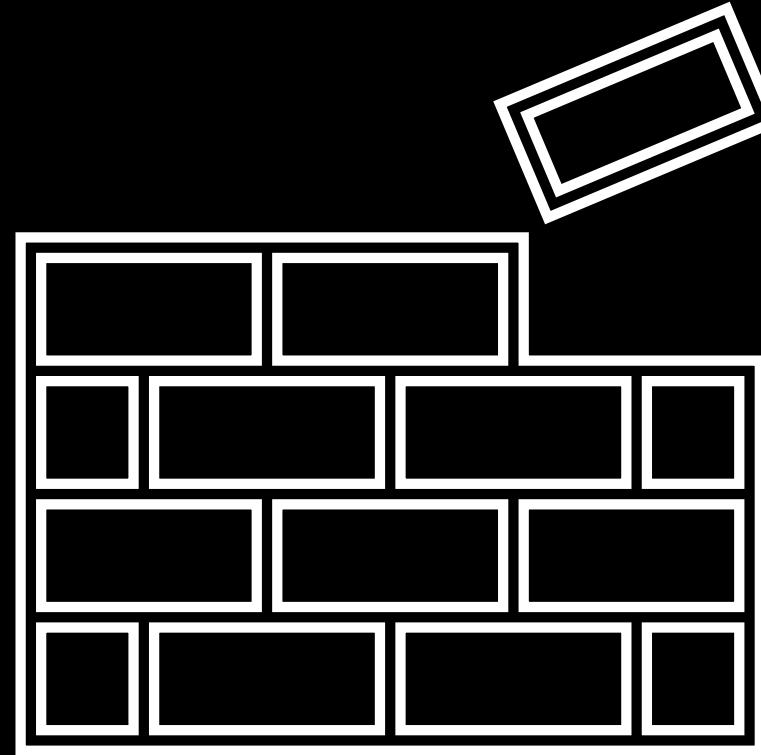


**PMI's PMBOK** – applying universal standards to Waterfall project management

a PROJECT is

a TEMPORARY  
endeavor

to CREATE



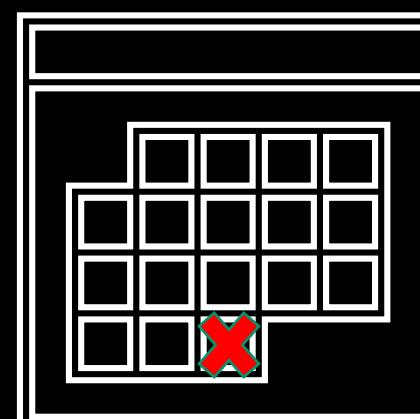
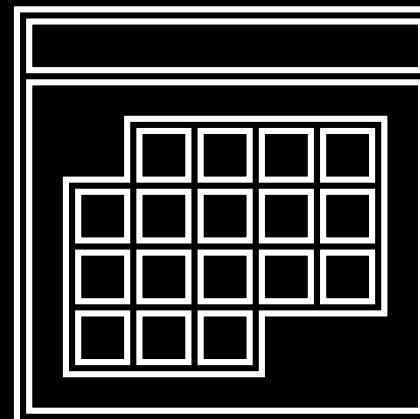
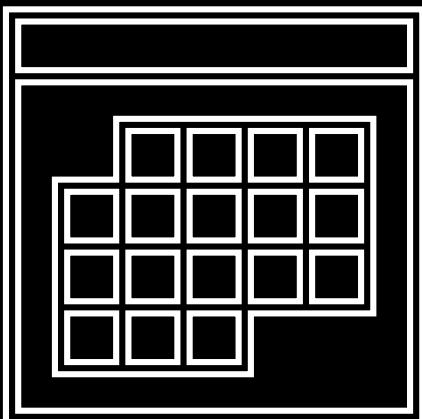
UNIQUE products,  
services, or results.

*Defined by the Project Management Institute (PMI)*

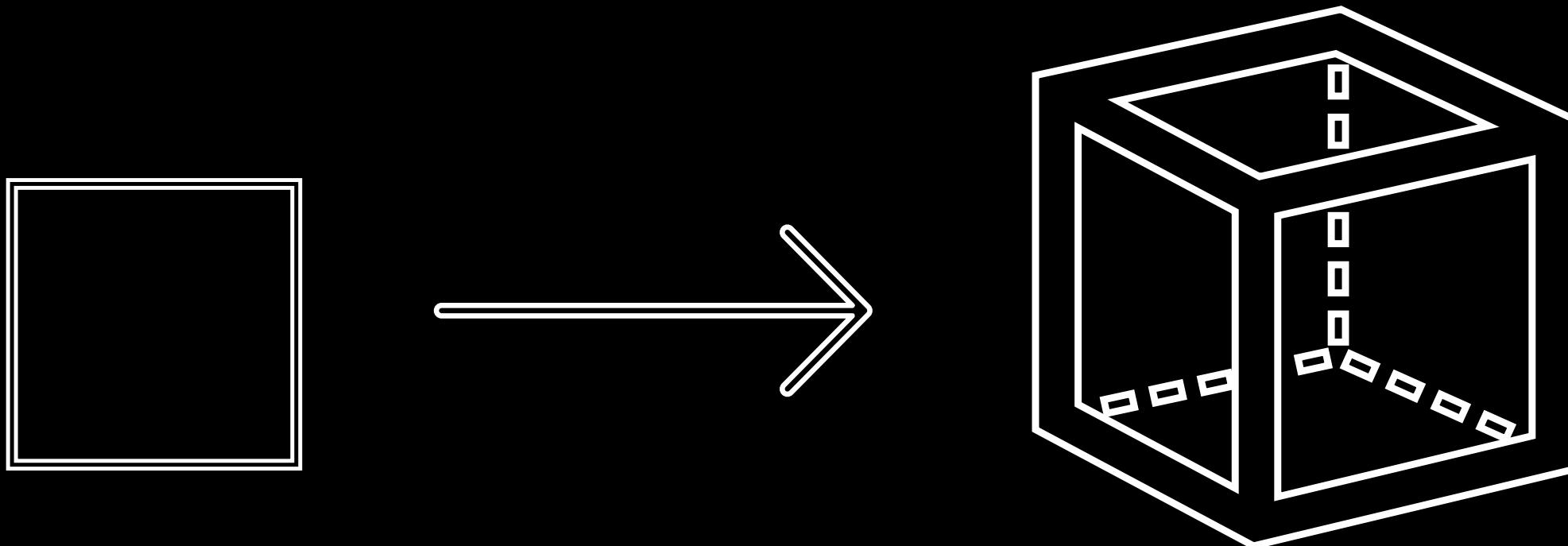
# TEMPORARY

## Define "TEMPORARY"

- Undertaken for a set period of time
- Will finish at some point
- Being "temporary" has nothing to do with the length of a project
- Results are permanent



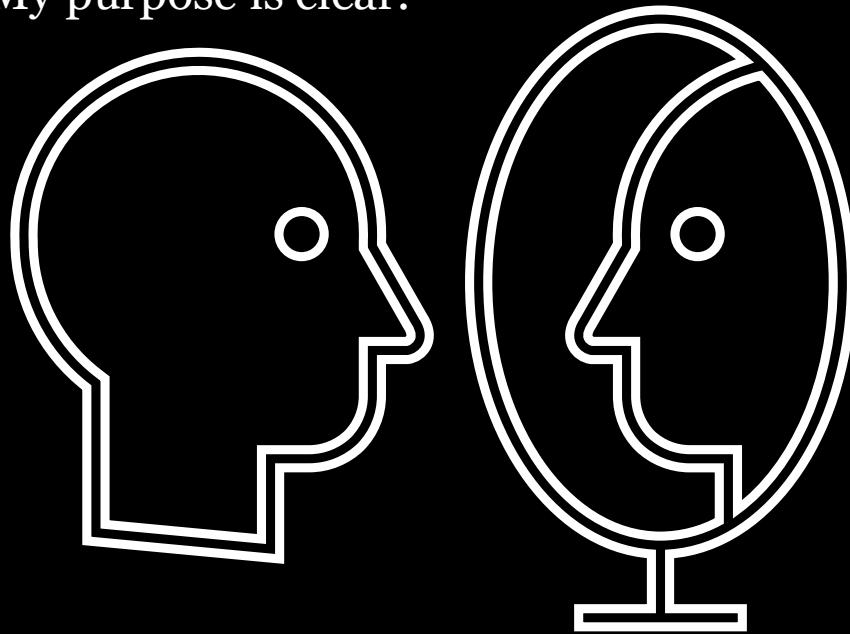
# UNIQUE



Making a product or service better for customers/clients/users

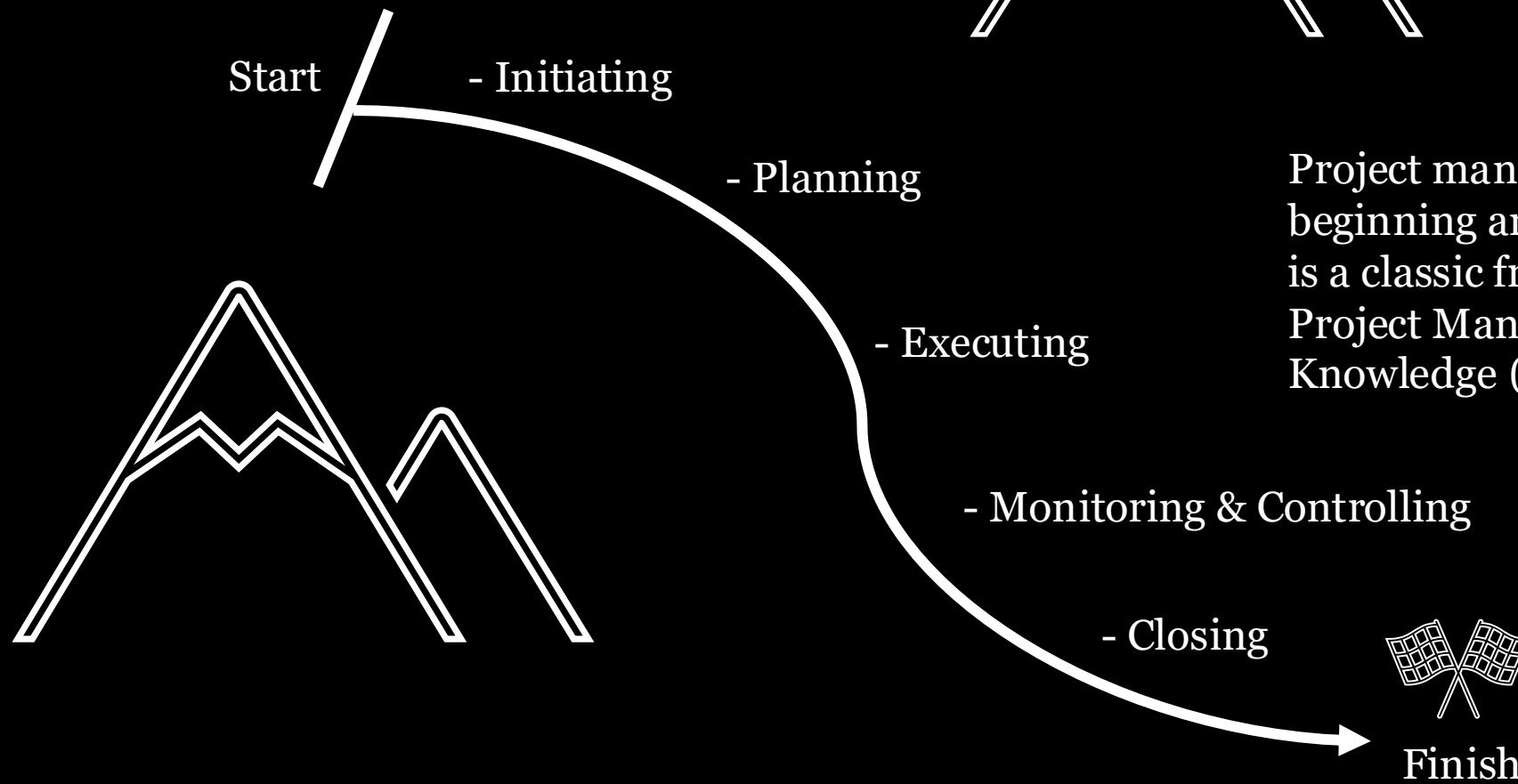
# With REASON/PURPOSE

"My purpose is clear."



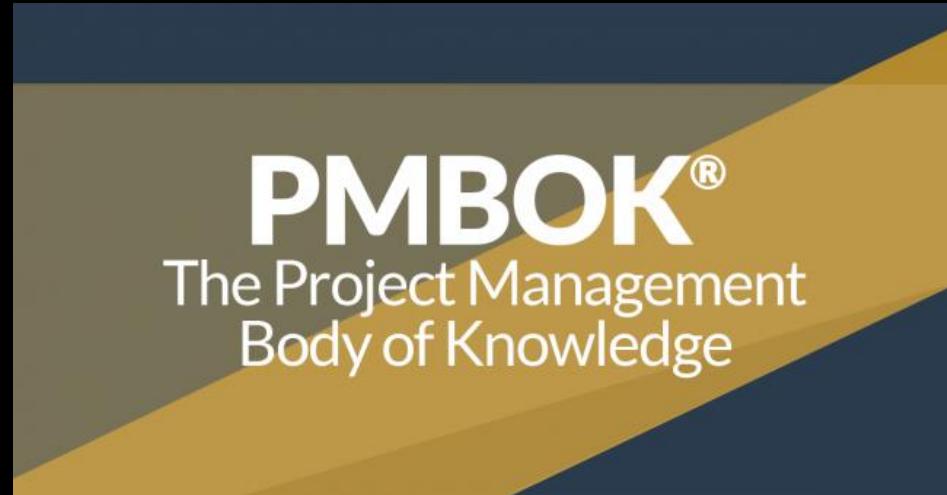
Project goals (or *Scope Statement*) is clearly defined and can be understood by others

# START TO FINISH



Project management has a clear beginning and end. This illustration is a classic framework from PMI's Project Management Body of Knowledge (PMBOK).

# What is PMI and PMBOK?



- PMI is an acronym for Project Management Institute, the world's largest professional association for project management professionals.
- PMI offers certifications, trainings, and networking opportunities. Learn more at [www.pmi.org](http://www.pmi.org)
- PMI is best known for teaching the PMBOK methodology
- PMBOK is an acronym for Project Management Body of Knowledge.
- PMBOK is an industry-standard methodology and it's often the first methodology project managers learn

# Types of Certifications provided by PMI



## Project Management Professional®

PMP® certification is the gold standard in project management. Recognized and demanded by organizations worldwide, the PMP validates your competence to perform in the role of a project manager, leading and directing projects and teams.

[Discover the PMP Certification Advantage](#)



## Certified Associate in Project Management (CAPM)®

CAPM® certification demonstrates your understanding of the fundamental knowledge, terminology, and processes of effective project management.

[Discover the CAPM Certification Advantage](#)



## PMI Professional in Business Analysis (PMI-PBA)®

PMI-PBA® certification highlights your expertise in business analysis. It spotlights your ability to work effectively with stakeholders to define their business requirements, shape the output of projects, and drive successful business outcomes.

[Discover the PMI-PBA Certification Advantage](#)



## Program Management Professional (PgMP)®

PgMP® certification is designed for those who manage multiple, complex projects to achieve strategic and organizational results.

[Discover the PgMP Certification Advantage](#)



## Portfolio Management Professional (PfMP)®

PfMP® certification recognizes the advanced experience and skill of portfolio managers. The PfMP demonstrates your proven ability in the coordinated management of one or more portfolios to achieve organizational objectives.

[Discover the PfMP Certification Advantage](#)



## PMI Risk Management Professional (PMI-RMP)®

PMI-RMP® certification demonstrates knowledge and expertise in the specialized area of assessing and identifying project risks along with plans to mitigate threats and capitalize on opportunities.

[Discover the PMI-RMP Certification Advantage](#)



## PMI Scheduling Professional (PMI-SP)®

PMI-SP® certification recognizes demonstrated knowledge and advanced experience in the specialized area of developing and maintaining project schedules.

[Discover the PMI-SP Certification Advantage](#)



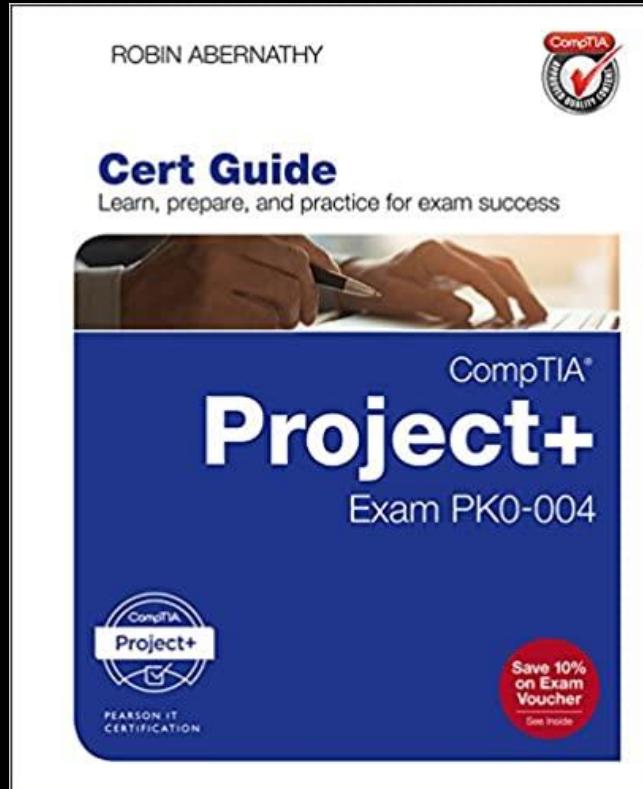
## PMI Project Management Ready™

The PMI Project Management Ready™ introduces high school and post-secondary students to the concepts and skillsets of project management.

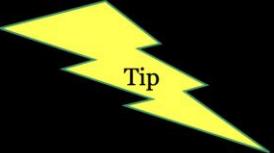
[Discover the PMI Project Management Ready Advantage](#)

# CompTIA's "Project+" Training

Like PMI, CompTIA offers certifications in project management. This class will instruct from CompTIA's PMBOK resources and materials.



<https://www.youtube.com/watch?v=ieEHRaE6vDg>

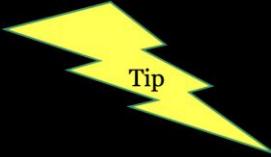


Tip

## Building Your PM Vocabulary

- The professional world uses acronyms to communicate faster. Even Year Up has its own acronym language that you've adopted: LC, L&D, FF, AD/QA/CNS, MMKO, OOO
- Similarly, project management has its own language of acronyms:
  - PM: Project Management –or- Project Manager
  - PMI: Project Management Institute
  - PMBOK: Project Management Body of Knowledge

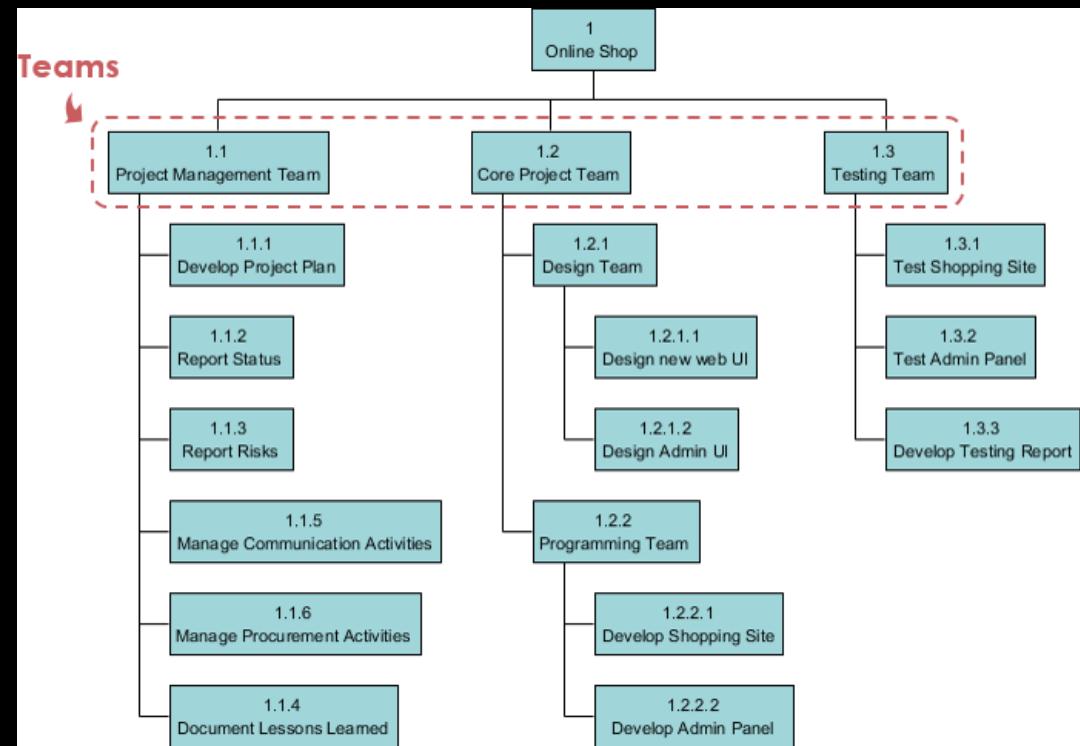
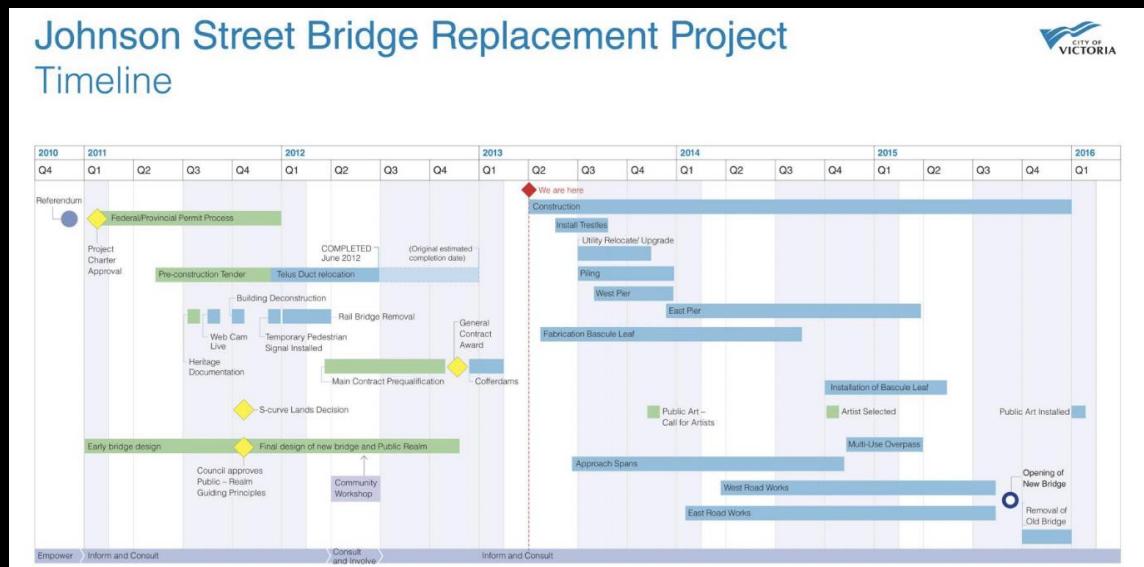
Adopt the PM language as quickly as possible



# Reading and Interpreting Visual Information

PM is highly visual and uses graphs, charts, calendars, etc. Find ways to strengthen your reading skills for visual information.

The visuals typically identify relationships between tasks, resources, people, etc.

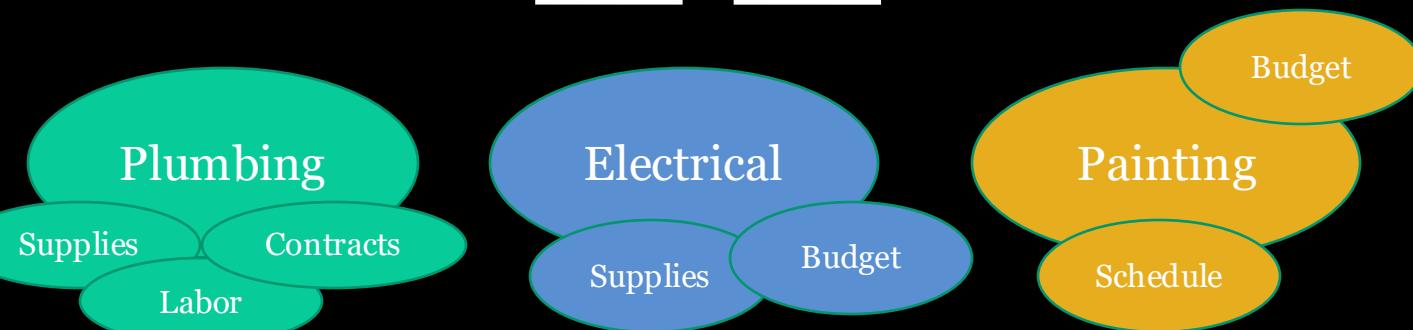
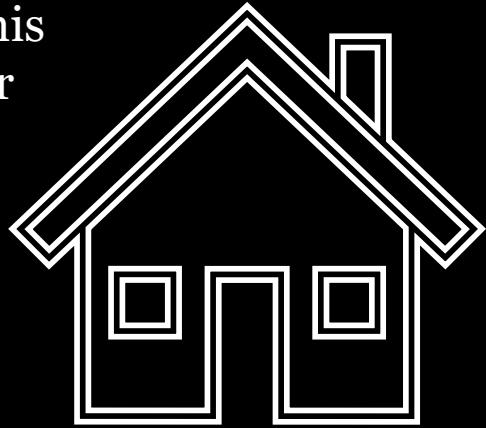




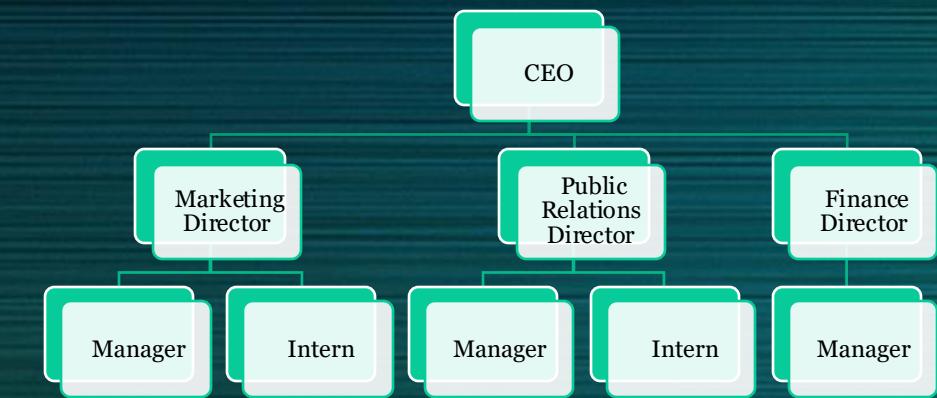
# Learning Objectives

- Understand the difference between project, product, and program management
- Define "project"
- Define "program" and "portfolio"
- Identify the 5 phases of project management
  - Initiating
  - Planning
  - Executing
  - Monitoring & Controlling Phase
  - Closing

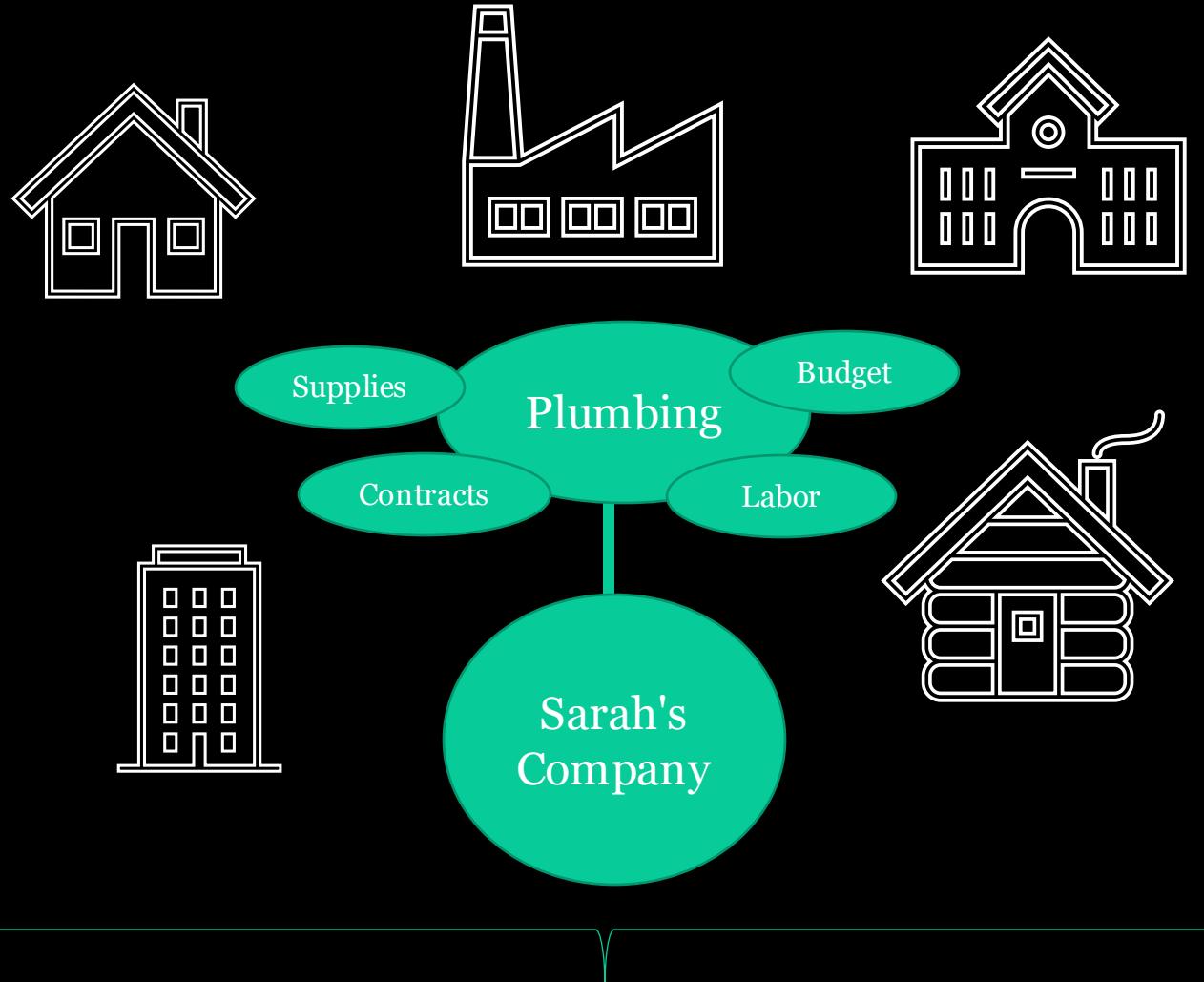
Project: Renovate this house in 1 month for \$10,000.



A **program** is a grouping of related projects or activities that are managed in coordination to obtain benefits not available if they were managed individually.



**PROGRAM**



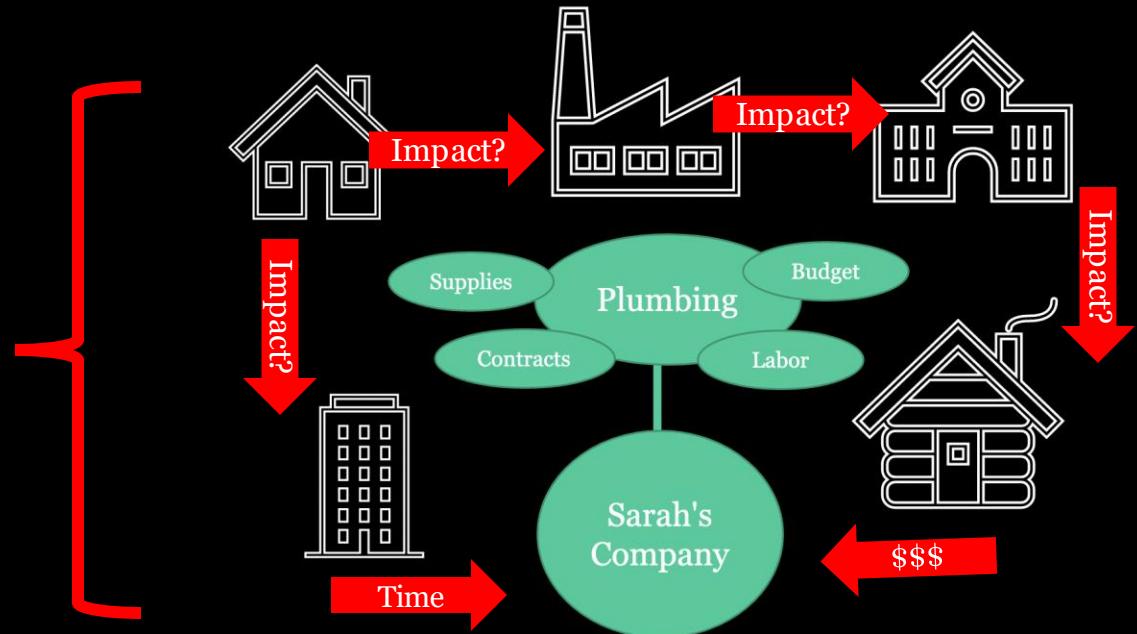
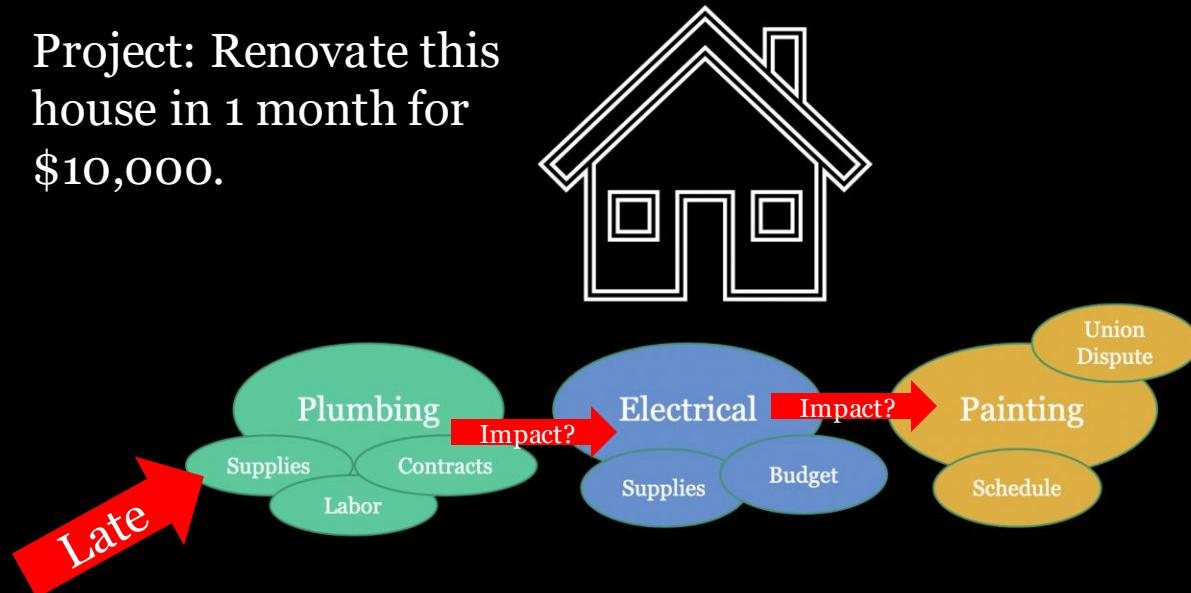
A **portfolio** includes all of the projects, programs, and operations managed by an organization to allow it to reach strategic objectives. It's also a collection of a professional or company's work. Portfolio management is also relationship management.



# PORTFOLIO

# Project Management = Ecosystem

Project: Renovate this house in 1 month for \$10,000.



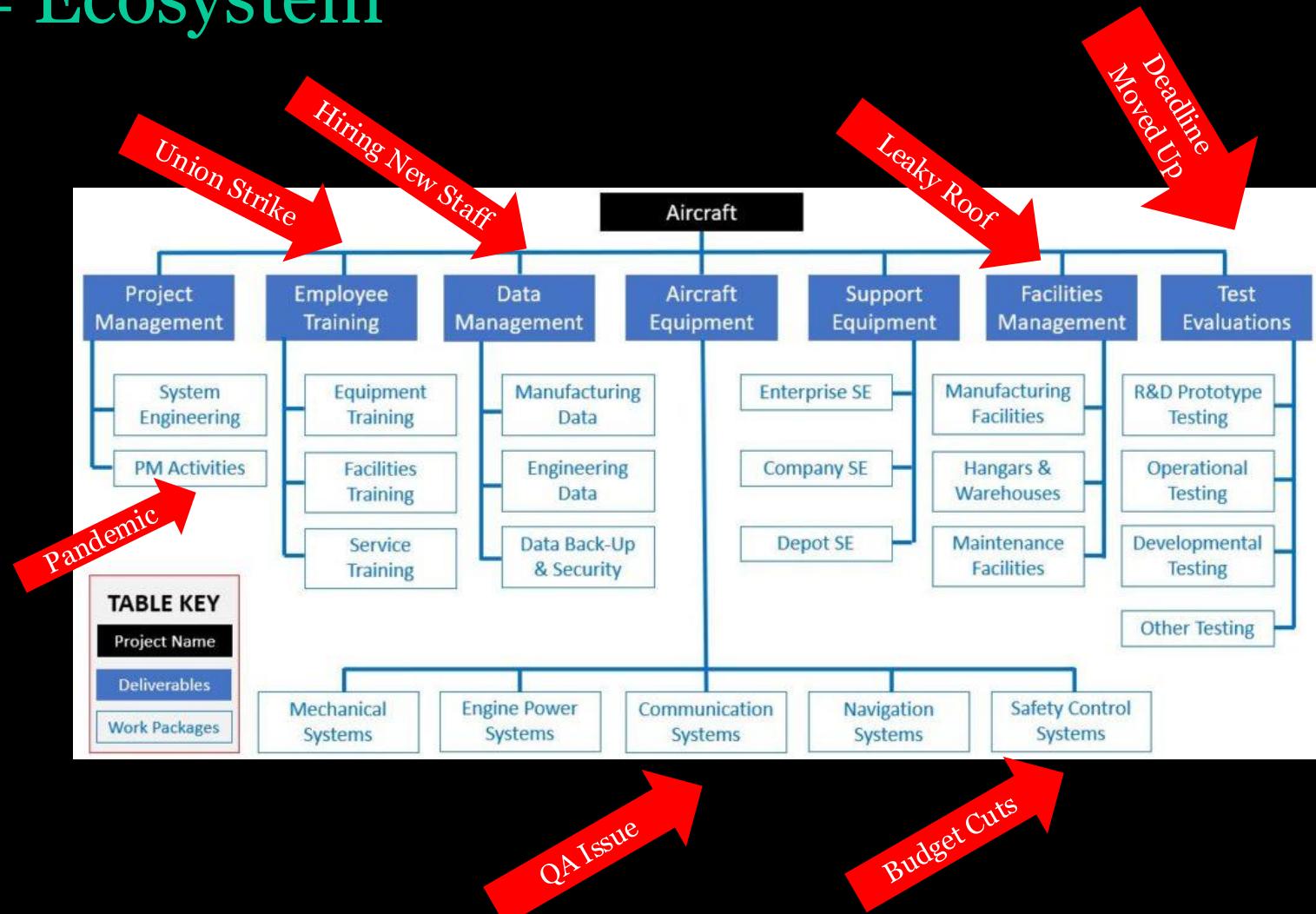
The terms *program* and *portfolio* represent fragile ecosystems; when one aspect is changed, it influences other parts of its ecosystem. For instance:

- What if the plumbing supplies are late by one month?
  - Can the electrical and painting departments do their work?
    - Is the project timeline now different?
      - How does this impact the project costs?
        - How is the company's portfolio (or other projects) impacted?

# Project Management = Ecosystem\*

Project management is a fragile ecosystem consisting of employees, costs, time, and other resources. When one of these resources is changed, the ecosystem is impacted, but to what degree?

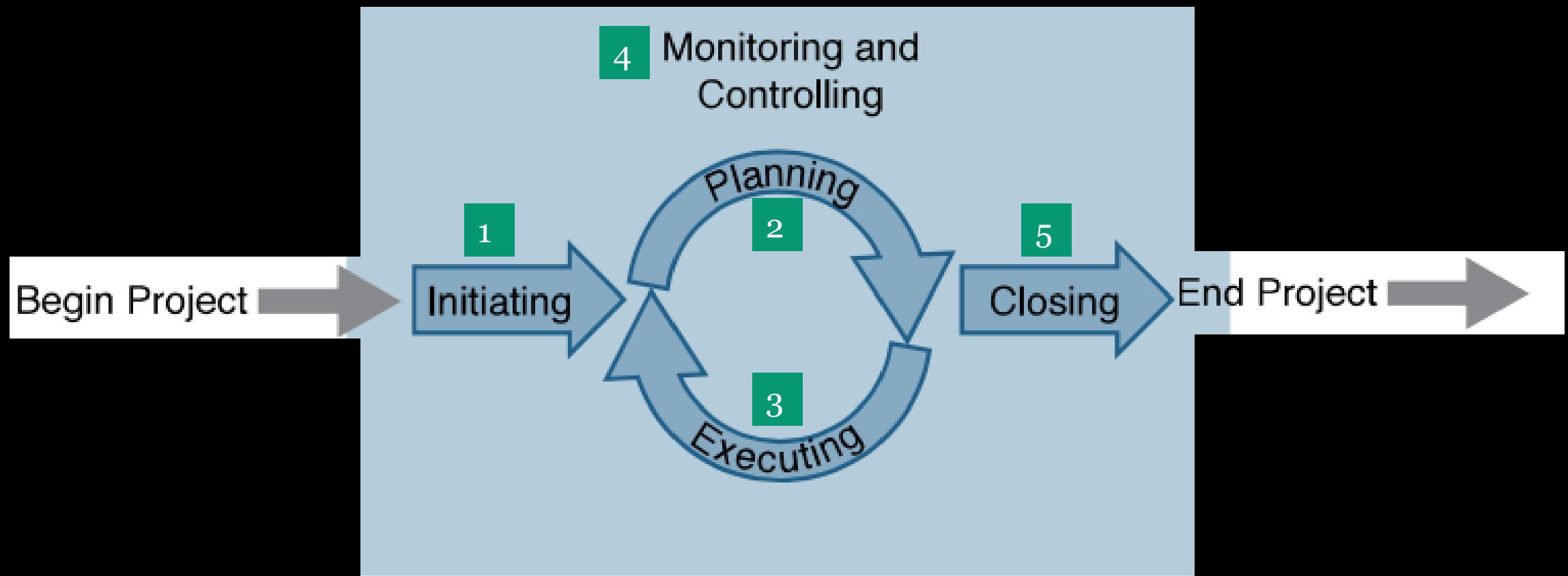
Project management is understanding the ecosystem (and to some degree, controlling it).



\*Dan's personal viewpoint

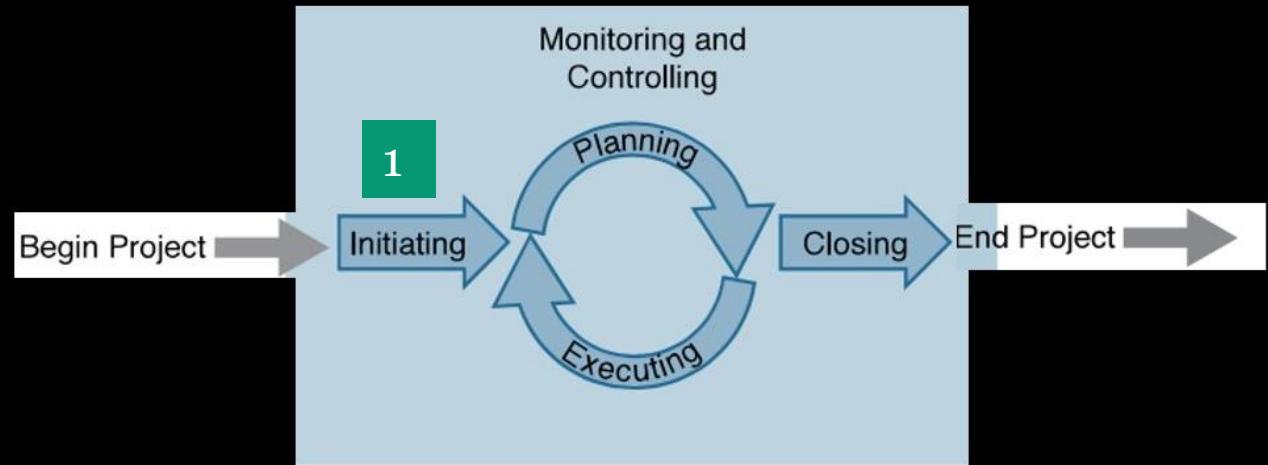
# PROJECT PHASES

The PMBOK project framework (or methodology) consists of 5 stages

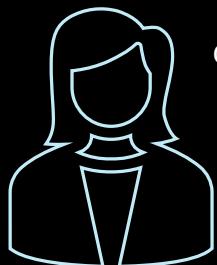


# 1 Initiating Phase

The Initiating Phase (a) defines a new project and (b) obtains authorization to start the project.



# What is the role of a Project Sponsor?



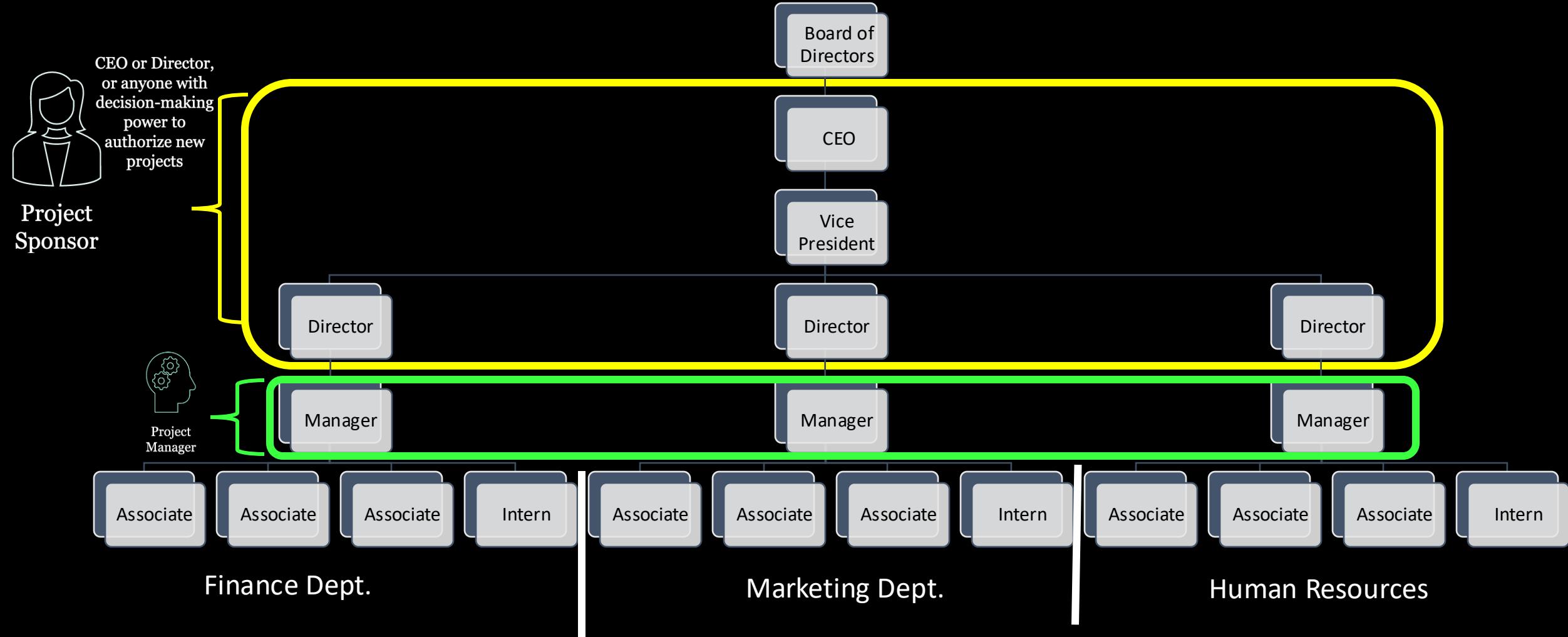
CEO or Director,  
or anyone with  
decision-making  
power to  
authorize new  
projects

Project  
Sponsor

A thumbnail from an APM video. It features the APM logo and the text "CHARTERED BODY OF PROJECT PROFESSION". Below this, the main title "What is the role of the project sponsor?" is displayed in large white text. To the right, there is an illustration of a woman in a red top and blue skirt pointing at a screen that shows a bar chart. The background is dark on the left and light on the right.

<https://www.youtube.com/watch?v=2q59DOqynMc>

# Company Structure



# What's a Project Charter?

A Project Charter answers the what/why/how/when of a project:



## Project Charter

A **project charter** allows a project manager to apply organizational resources (e.g. time, money, staff) to complete the project.

Statement of Work

The *statement of work* is an overview of the *project* in all its dimensions.

Business Case

A *business case* provides justification for undertaking a project

High Level Work/Definition

*High-level* describe those operations that are more abstract in nature

High Level Risks

An initial assessment of project risks

Stakeholder Register

Major key players in a project

## Why/What/How/When

### Statement of Work

The *statement of work* is a detailed overview of the *project* in all its dimensions.

### Business Case

A **business case** provides justification for undertaking a **project**

### High Level Work/Definition

**High-level** describe those operations that are more abstract in nature

### Stakeholder Register

Major key players in a project

### High Level Risks

An initial assessment of project risks

|                                        |                                                                                                                                                                                                                                                                                                                                  |                   |           |
|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-----------|
| Project name: OrangeDelivery App       |                                                                                                                                                                                                                                                                                                                                  |                   |           |
| Project description:                   | A mobile application for ordering foodstuffs and other products from OrangeSupermarket stores. The app will be available on Google Play and App Store.                                                                                                                                                                           |                   |           |
| Project objectives:                    | Facilitate ordering foodstuff and other products published on OrangeSupermarket store website via a mobile phone.                                                                                                                                                                                                                |                   |           |
| Project is considered successful when: | <ol style="list-style-type: none"> <li>1. The app has a high number of downloads on Google Play and App Store.</li> <li>2. The app has ratings of 4-5 stars on Google Play and App Store and more than 10 positive reviews on each platform.</li> <li>3. The number of OrangeSupermarket store customers grew by 10%.</li> </ol> |                   |           |
| Project participants:                  | Title:                                                                                                                                                                                                                                                                                                                           | Name:             |           |
|                                        | Investor                                                                                                                                                                                                                                                                                                                         | Jake McKinsey     |           |
|                                        | Project manager                                                                                                                                                                                                                                                                                                                  | John Smith        |           |
|                                        | Finance manager                                                                                                                                                                                                                                                                                                                  | Anna Murry        |           |
|                                        | Team members:                                                                                                                                                                                                                                                                                                                    |                   |           |
|                                        | Front-end developer                                                                                                                                                                                                                                                                                                              | James Thomson     |           |
|                                        | Back-end developer                                                                                                                                                                                                                                                                                                               | Andrew Michaelson |           |
|                                        | QA engineer                                                                                                                                                                                                                                                                                                                      | Kirsty Watts      |           |
| Available resources:                   | Budget: \$3,000<br>Testing environment: Apple iPhone 11 Pro; Xiaomi Redmi Note 7                                                                                                                                                                                                                                                 |                   |           |
| Milestones:                            | Status:                                                                                                                                                                                                                                                                                                                          | Due:              | Deadline: |
|                                        | 1. Build 1.0 Main functions presentation                                                                                                                                                                                                                                                                                         | 1/03/2020         | 3/03/2020 |
|                                        | 2. Build 2.0 Adding new features after beta-testing                                                                                                                                                                                                                                                                              | 1/04/2020         | 4/04/2020 |
| Potential risks:                       | <ol style="list-style-type: none"> <li>1. The team may not meet deadlines due to adding unplanned in the specification features.</li> <li>2. The team may run out of the budget due to extending development or testing time.</li> </ol>                                                                                         |                   |           |
| Approval:                              | Title and name:                                                                                                                                                                                                                                                                                                                  |                   | Date:     |
|                                        | Investor: John Smith<br>signature _____                                                                                                                                                                                                                                                                                          |                   | 1/02/2020 |
|                                        | Project manager: Ivan Johnson<br>signature _____                                                                                                                                                                                                                                                                                 |                   |           |
|                                        | Finance manager: Anna Murry<br>signature _____                                                                                                                                                                                                                                                                                   |                   |           |

## Project Charter – Waftly Towers Hotel Rehabilitation

Date/version : 1 Jun 2011 / Version 1.0

Approved by : Manuel Iknno – CEO and Chairman, Melbury Investments Ltd.

### Background

Melbury Investments has recently acquired the Waftly Towers property at 16 Elwood Avenue, Torquay. An existing hotel, the property is currently in poor state of repair and due to poor management has attained a reputation for poor service, both within the local community and with its guests. Waftly Towers is Melbury Investment's first hotel acquisition and the property is to become the flagship in a chain of Melbury Hotels that Melbury plans on developing over the next five years. Melbury Hotels are to be positioned towards the upper end of the hotel market and marketed as medium sized hotels in which personal service is a central theme.

As a first step in that longer term strategy the Waftly Towers rehabilitation project will be undertaken in order to rehabilitate and reopen the property using the Melbury Hotel brand. As well as returning the Waftly Towers property to profitability, the Waftly Towers rehabilitation project will provide a platform for the subsequent launch of the Melbury Hotel chain.

### High level Project Approach

The project will be divided into two phases;

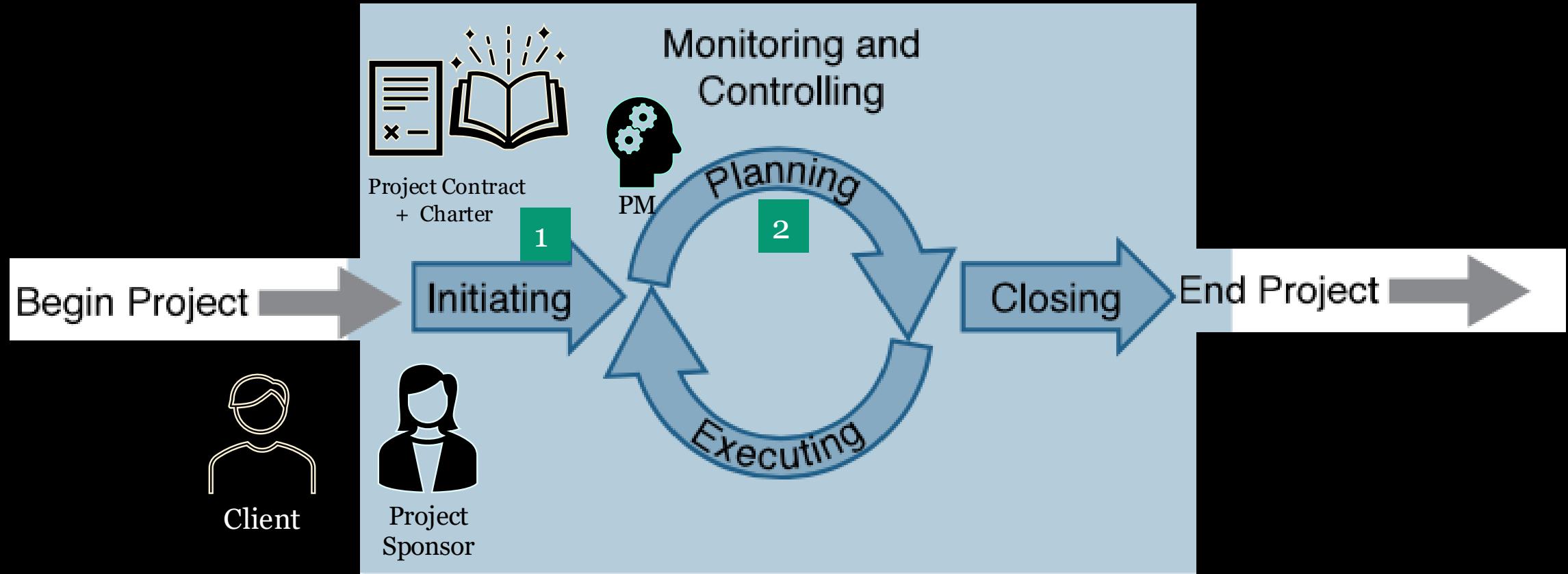
1. Renovation and construction (estimated to be 9 months in duration)
2. Re-opening and business rehabilitation (to take 12 months following reopening)

Twelve months after reopening the hotel will be deemed fully operational and the project will be closed.

# Project Charter Example

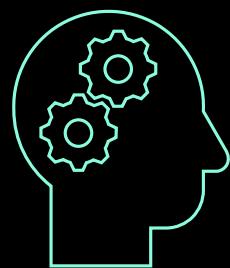
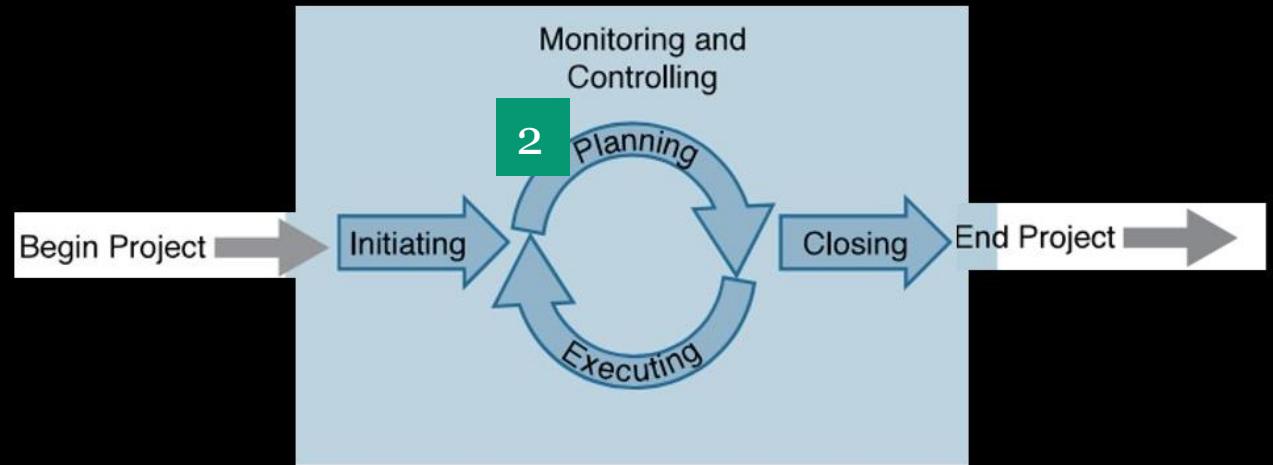
<http://calleam.com/WTPF/wp-content/uploads/Core/SAMPLE-Charter.pdf>

# PROJECT PHASES



## 2 Planning Phase

The Planning Phase (a) establishes total project scope and objectives and (b) then develops action steps required.



Project Charter

New elements  
are added

### How is a project's scope measured?

+14

Scope  
Baseline

Scope  
Statement

Work  
Breakdown  
Structure

Resources

Procurement  
Management  
Plan

Requirements  
Management  
Plan

Communication  
Plan

Change  
Management  
Plan

Requirements

Stakeholder  
Management  
Plan

Budget

Detailed  
Risks

Scope  
Management  
Plan

Schedule

# The Hardship of the Planning Phase: Details, Details, Details



## Key Points

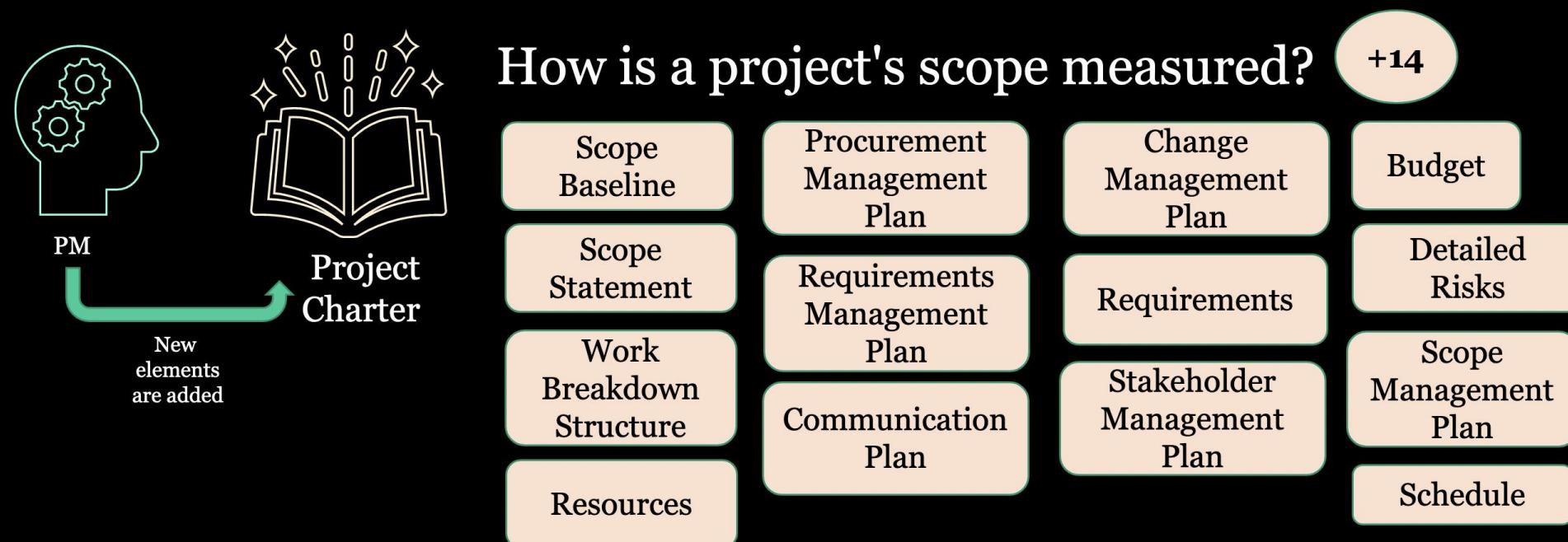
- A project definition is key to planning a project
- Every detail must be considered, especially with time, costs, and people
- PM is very much like, "We have to do this...and this...and that...and then this...oh, I forgot about this..." and so on

0:51-5:00

[https://www.youtube.com/watch?v=9G\\_LwG8o  
zpo&feature=youtu.be](https://www.youtube.com/watch?v=9G_LwG8o zpo&feature=youtu.be)

# The Goal (and Hope) of the Planning Phase

- It's unrealistic for a PM to think of *every* detail of a project. Yet, a PM must try
- The project charter is a roadmap to success. Without a roadmap, the project team will get lost and consume an excessive amount of resources (time, money, staff)
- A project charter protects employees from future risk and lawsuits
- Planning tip: block out at least a half a workday without interruption



# Project Charter Example

## Project: **Johnson Street Bridge Replacement**

Author: Project Steering Committee

Date: February 4, 2011

Adopted: Special Council meeting February 4, 2011

Amended: March 21, 2013

[https://www.coursehero.com/file/28178568  
/JSB-Charter-revised-for-2013-03-21-  
GPCpdf/](https://www.coursehero.com/file/28178568/JSB-Charter-revised-for-2013-03-21-GPCpdf/)

# Why Are Details Important in a Project Charter?



Imagine writing instructions on how to make a peanut butter & jelly sandwich for others. That's easy, right?

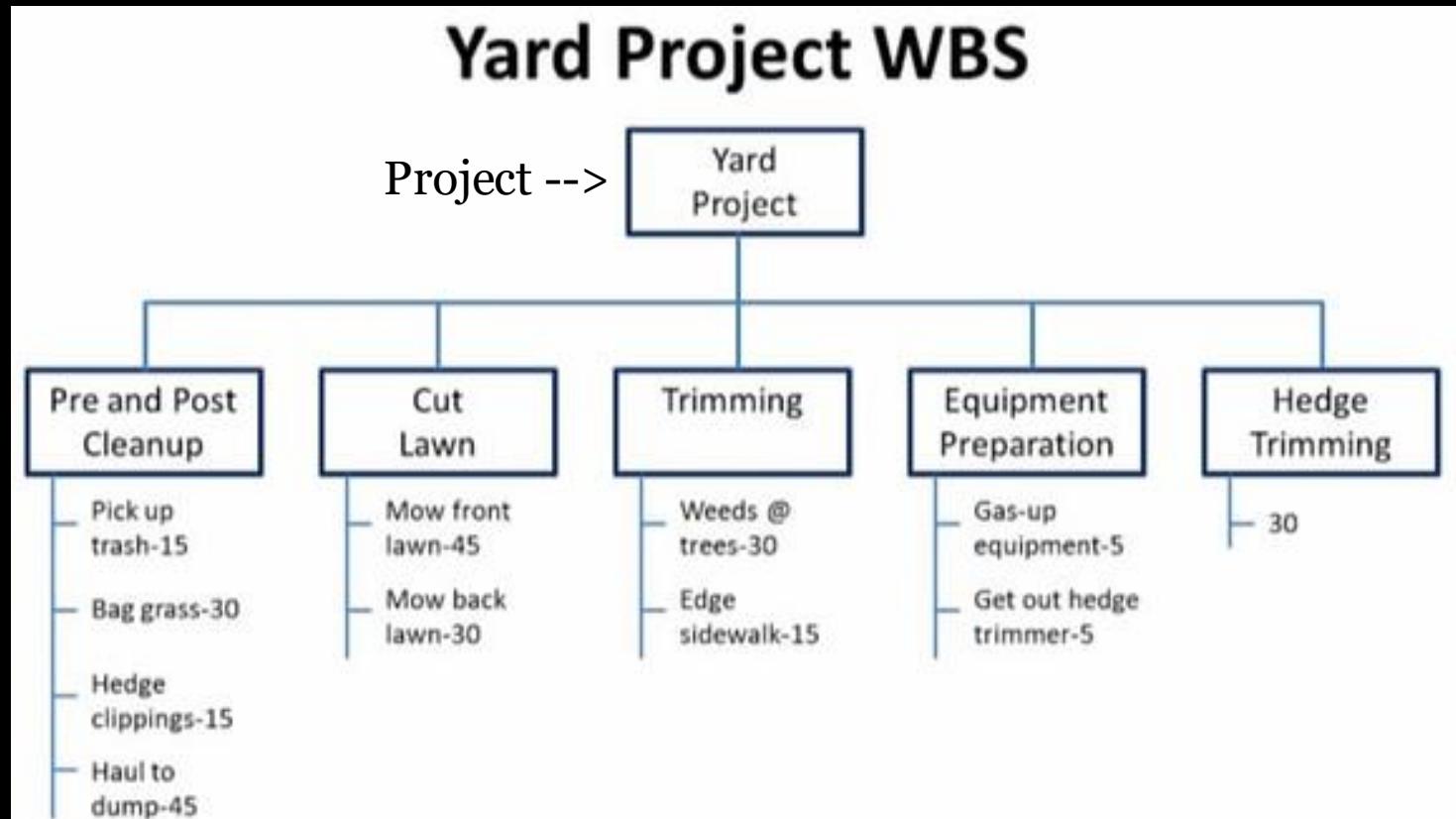
What if your client expects perfect instructions? And what if your entire professional career depends on your project success? How confident are you?

[https://www.reddit.com/r/MadeMeSmile/comments/o8tohe/the\\_struggle\\_of\\_making\\_a\\_good\\_instruction/?utm\\_source=share&utm\\_medium=ios\\_app&utm\\_name=iossmf](https://www.reddit.com/r/MadeMeSmile/comments/o8tohe/the_struggle_of_making_a_good_instruction/?utm_source=share&utm_medium=ios_app&utm_name=iossmf)

# What is a Work Breakdown Structure (WBS)?

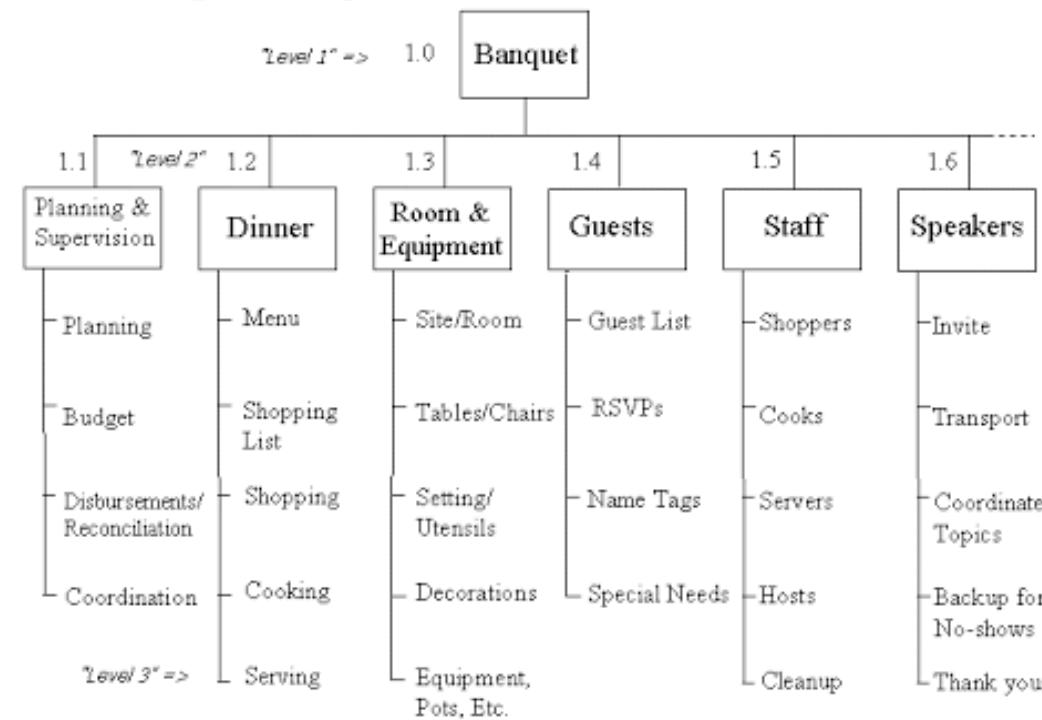
The *Work Breakdown Structure (WBS)* is one of the most important project management documents.

A *Work Breakdown Structure (WBS)* is a visual, hierarchical and deliverable-oriented deconstruction of a project.

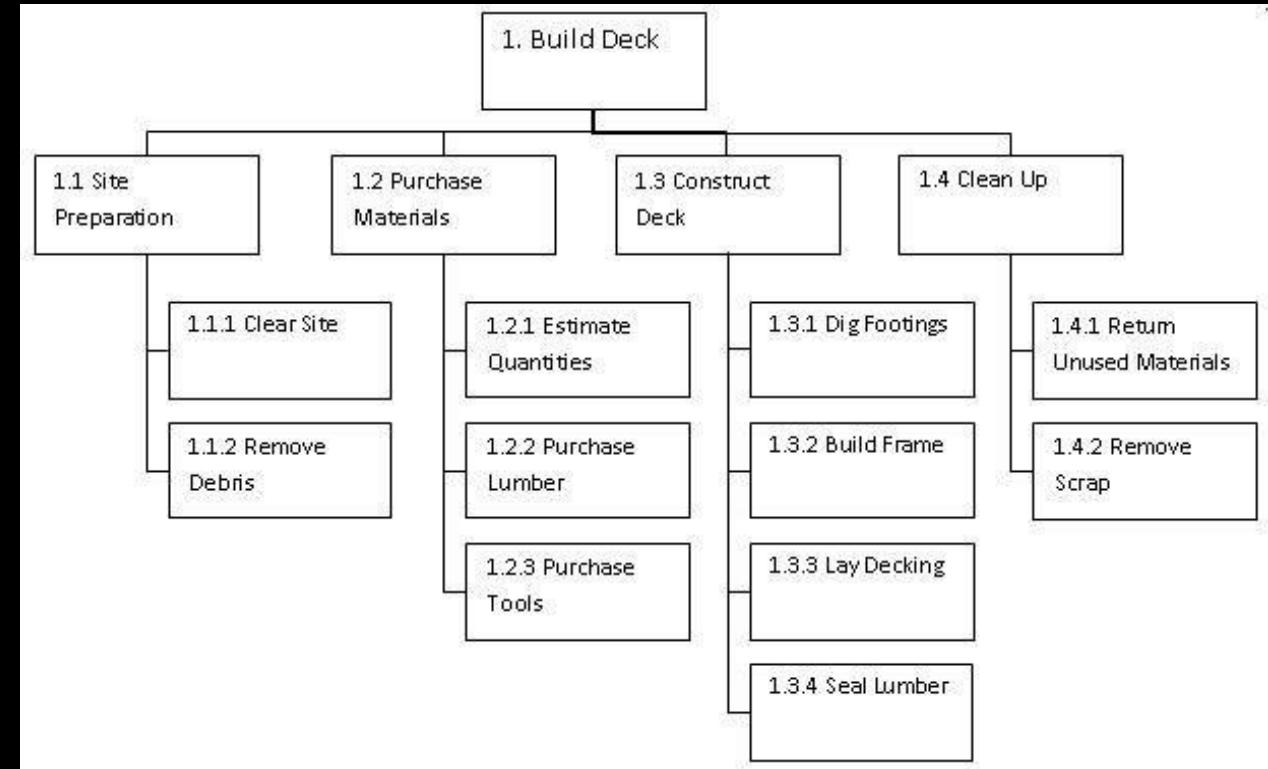


# Simple Work Breakdown Structures (WBS)

WBS Example - Banquet

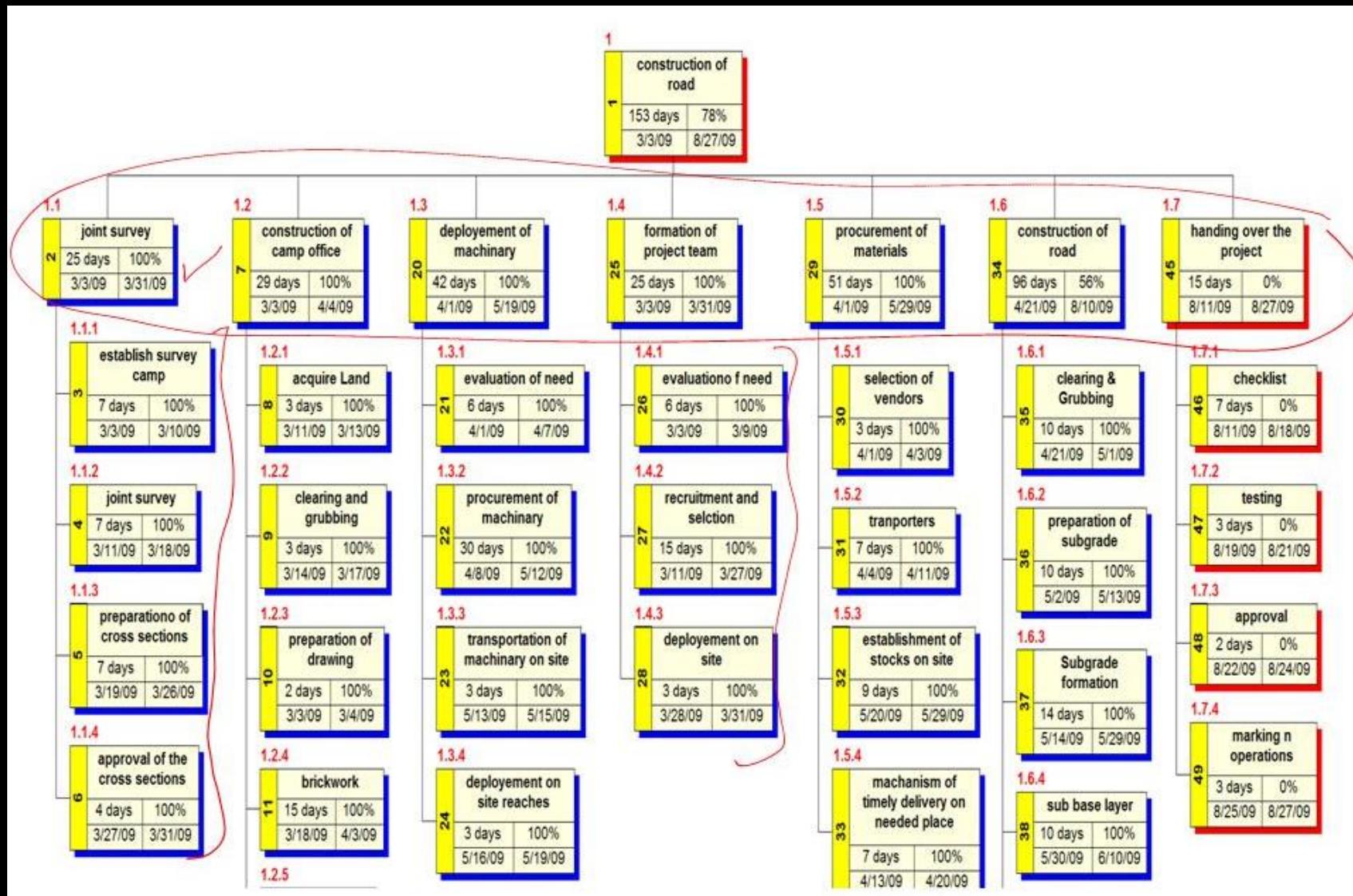


Host a Banquet



Build a Deck

# Complex Work Breakdown Structure (WBS)



This version includes task length and deadlines

# WBS: Different Formats

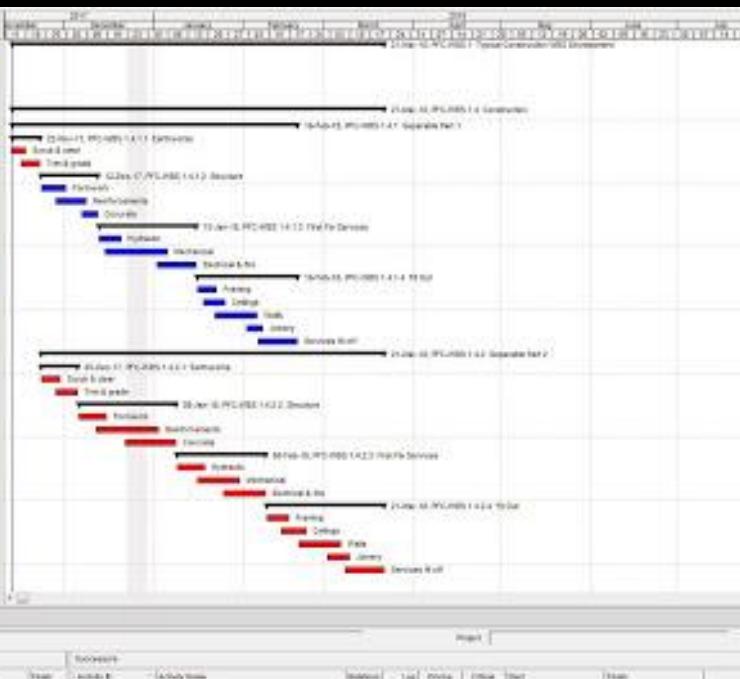
| All | Task Name                     | Duration   | Planned Start Date | Planned Finish Date |
|-----|-------------------------------|------------|--------------------|---------------------|
| 1   | IT Migration Project          | 1,158 days | 1/4/2016           | 6/10/2020           |
| 2   | 1. Analysis                   | 8 days     | 1/4/2016           | 1/13/2016           |
| 3   | On-Site Meetings              | 4 days     | 1/4/2016           | 1/7/2016            |
| 4   | Discussions with Stakeholders | 2 days     | 1/8/2016           | 1/11/2016           |
| 5   | Document Current System       | 2 days     | 1/12/2016          | 1/13/2016           |
| 6   | Analysis Complete             | 0 days     | 1/13/2016          | 1/13/2016           |
| 7   | 2. Design                     | 21 days    | 1/13/2016          | 2/10/2016           |
| 8   | Design Database               | 9 days     | 1/13/2016          | 1/25/2016           |
| 9   | Software Design               | 5 days     | 1/25/2016          | 2/1/2016            |
| 10  | Interface Design              | 2 days     | 2/1/2016           | 2/3/2016            |
| 11  | Create Design Specifics       | 5 days     | 2/3/2016           | 2/10/2016           |
| 12  | Design Complete               | 0 days     | 2/10/2016          | 2/10/2016           |
| 13  | 3. Development                | 21 days    | 1/14/2016          | 2/11/2016           |
| 14  | 4. Testing                    | 17 days    | 1/29/2016          | 2/22/2016           |
| 15  | 5. Implementation             | 15 days    | 2/23/2016          | 3/14/2016           |

List-Form

Action Steps



Timeline

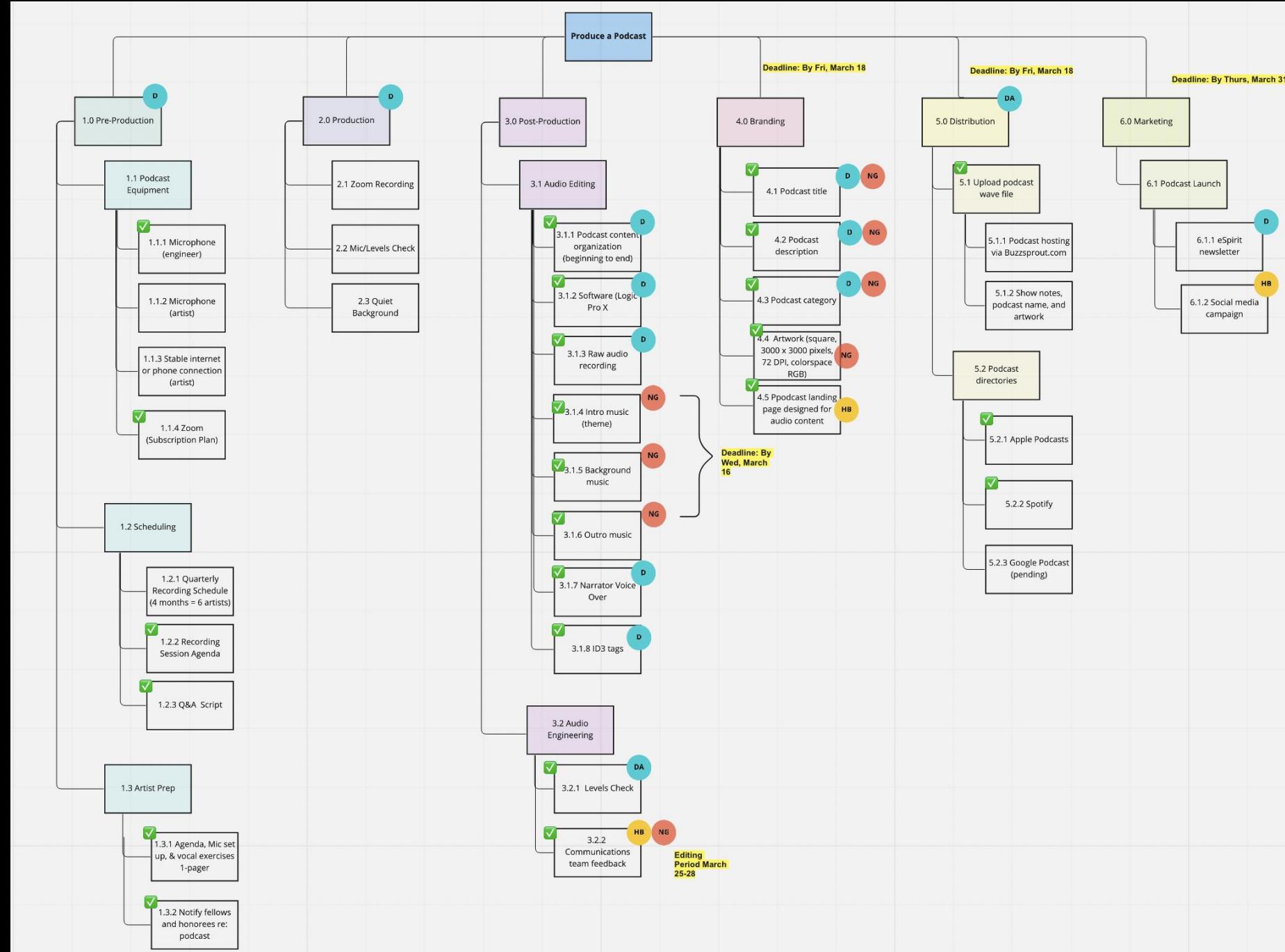


Gantt Chart

# WBS from a Recent Project of Dan's clients:

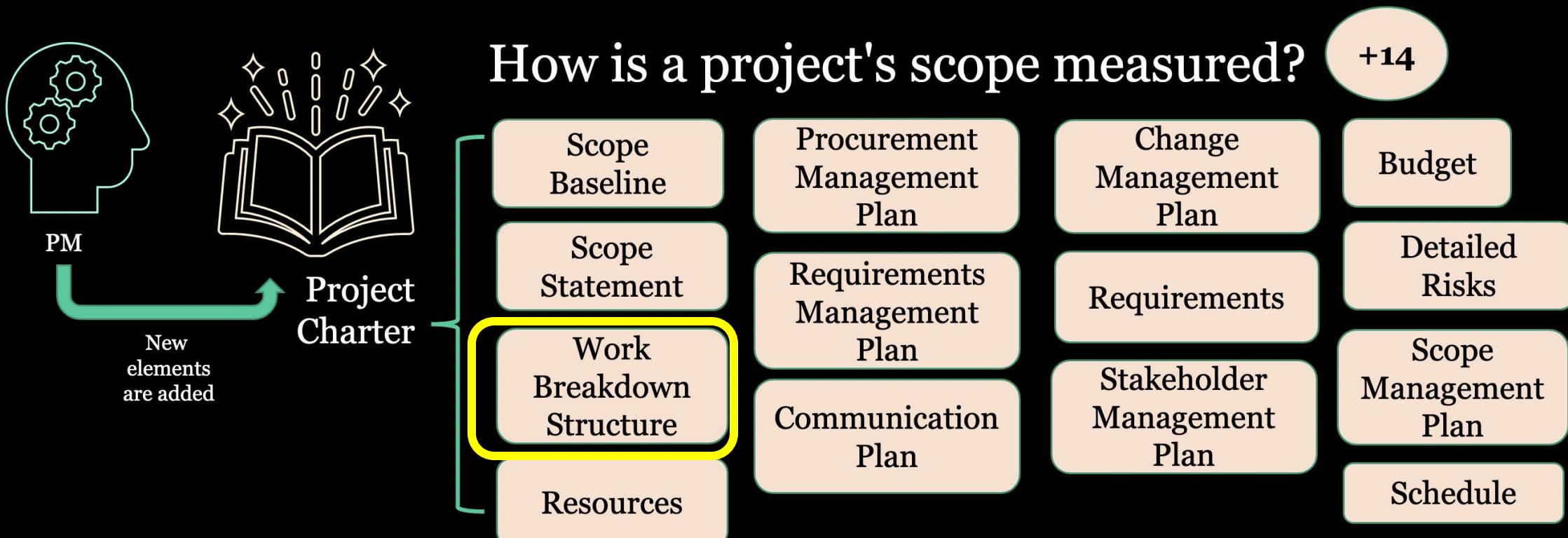
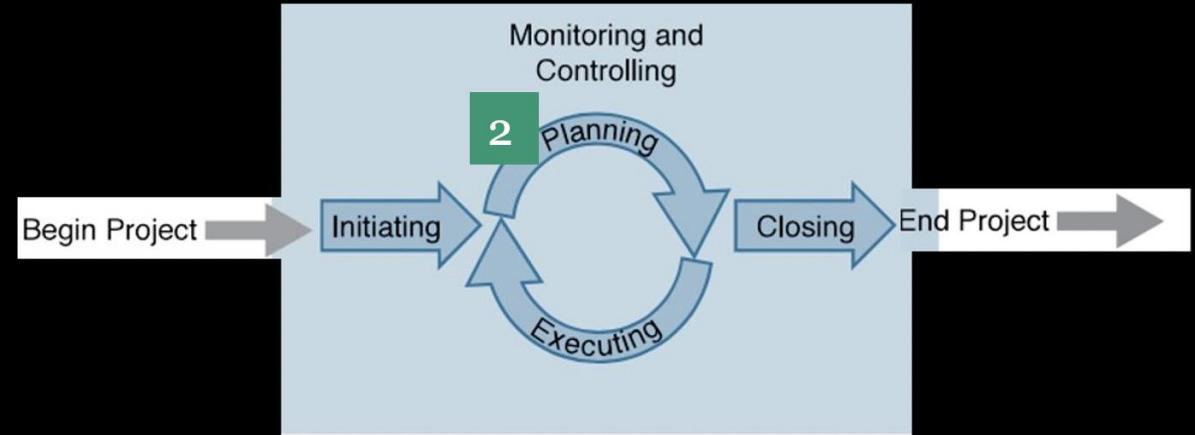
## Launch a Podcast

We will discuss and build WBSs soon.

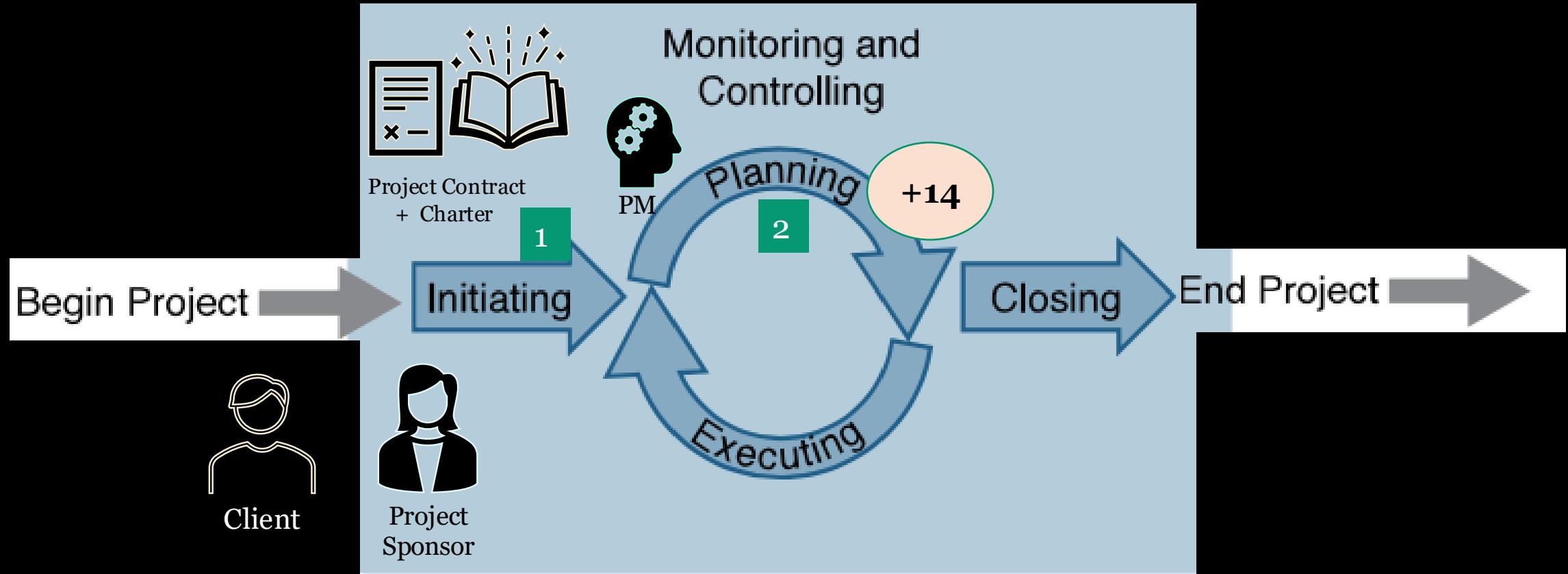


## 2 Planning Phase

The Planning Phase (a) establishes total project scope and objectives and (b) then develops action steps required.



# PROJECT PHASES





# Learning Objectives

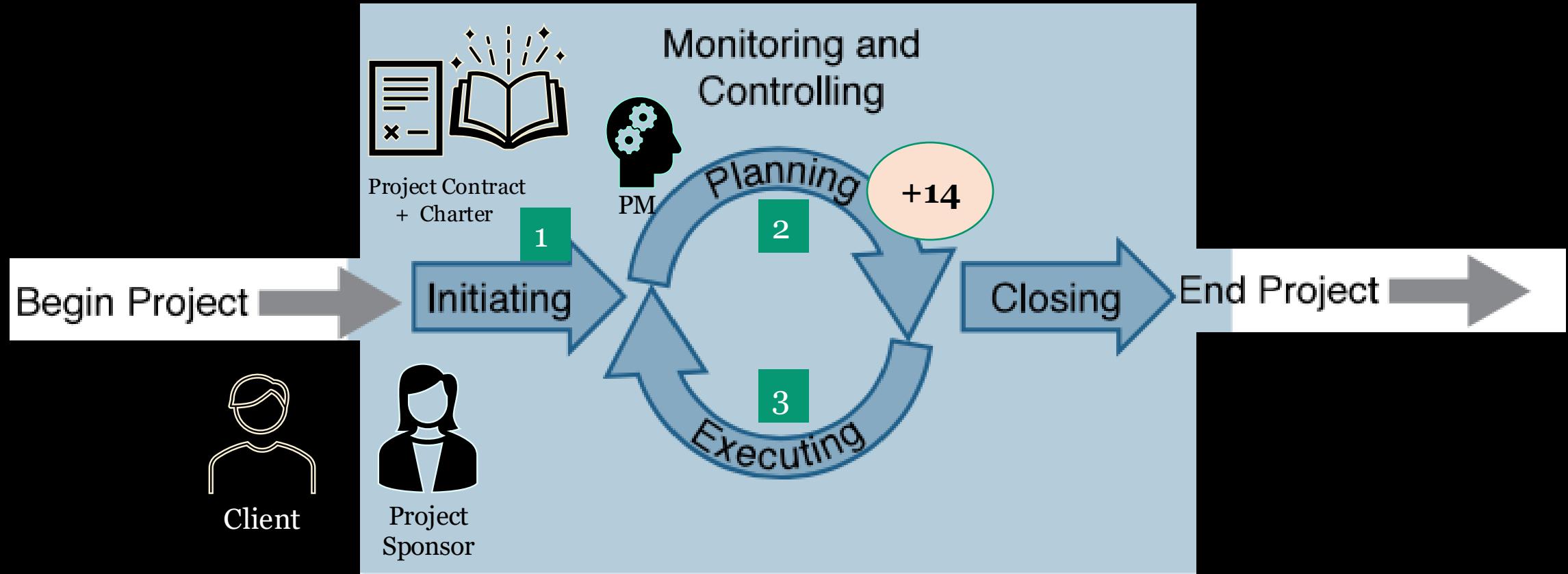
- Understand the difference between project, product, and program management
- Define "project"
- Define "program" and "portfolio"
- Identify the 5 phases of project management
  - Initiating
  - Planning
  - Executing
  - Monitoring & Controlling Phase
  - Closing

# Project Management refresher



<https://www.youtube.com/watch?v=Jk-JwtScIlw>

# PROJECT PHASES

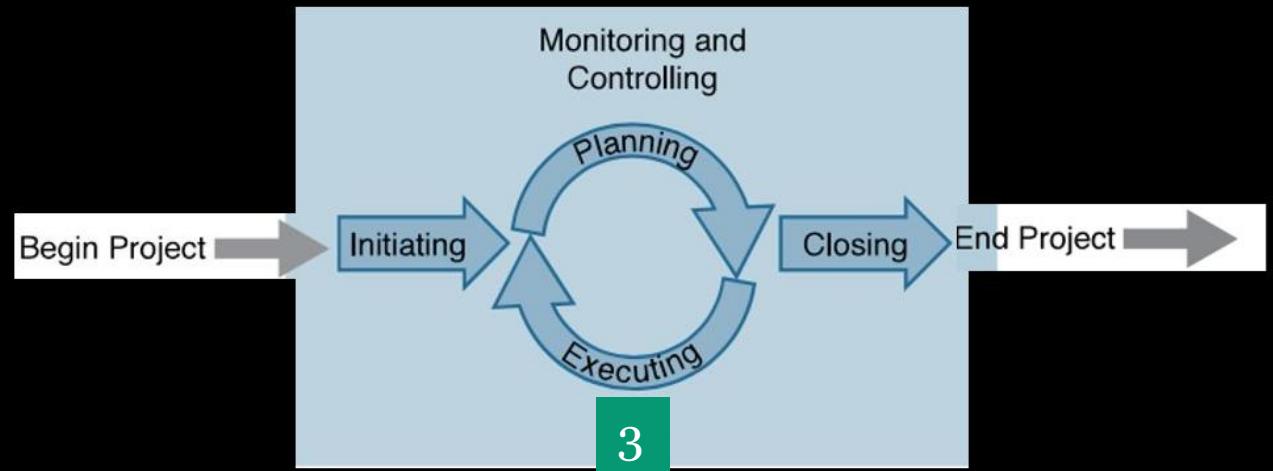


## 3 Executing Phase

The **Executing Phase** completes the work defined in the project management plan.

The Project Manager gathers the resources to complete the project:

- Personnel (aka the team)
- Tools
- Manages stakeholder expectations
- Directs the work ahead



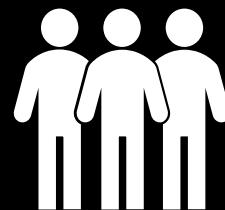
2  
Planning Phase



PM



3  
Executing Phase



Team

New project details are added

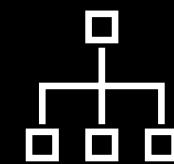
Examples of Resources



Tools



Hardware/  
software



The plan (Work  
Breakdown  
Structure)



Virtual

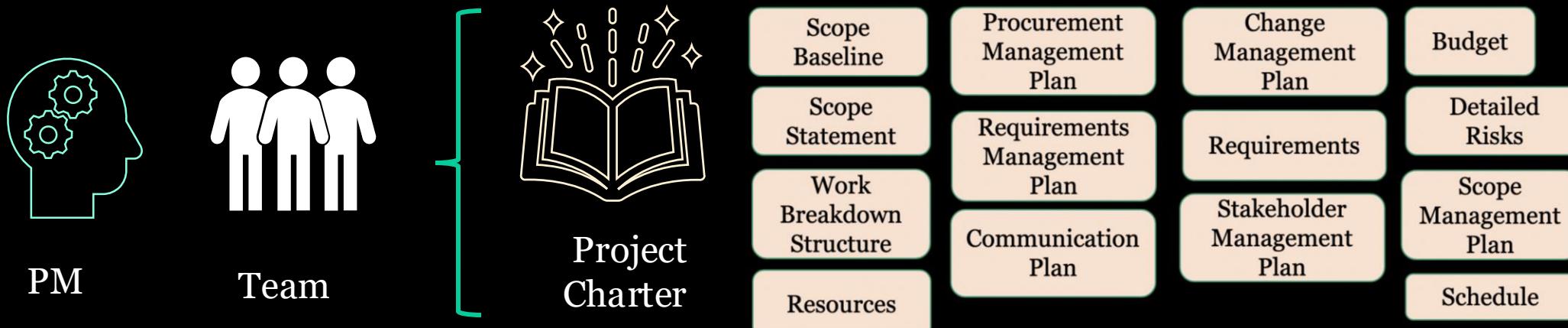


In-Person

Team Meeting

# The Team Must Understand the Project Charter & Ask Questions

+14



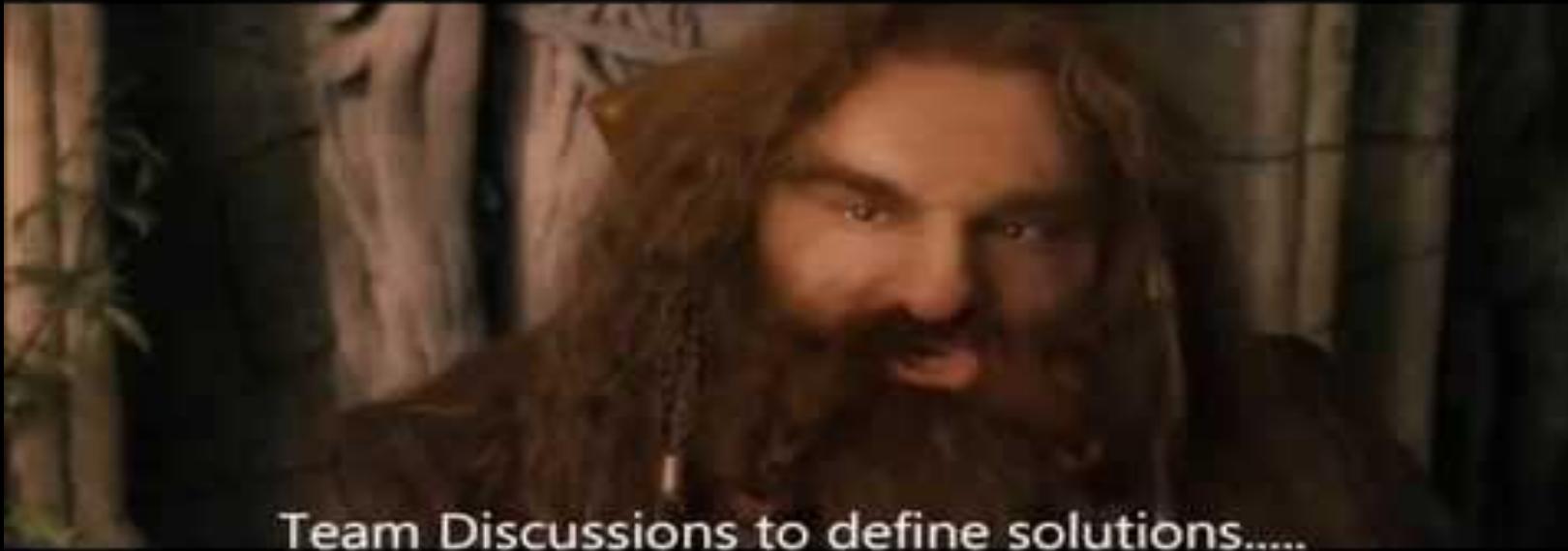
## Objectives for the First Team Meeting

- Team roles are defined
- Boundaries/expectations are set
- Team values are often discussed
- Deadlines are finalized
- The project charter is reviewed in detail
- Questions/worries/hopes are documented

3

## Executing Phase

The Lord of the Rings is the saga of a group of sometimes reluctant heroes who set forth to save their world from evil. The heroes must destroy a powerful ring that controls the entire world. This clip exemplifies what an introductory team meeting might look like.



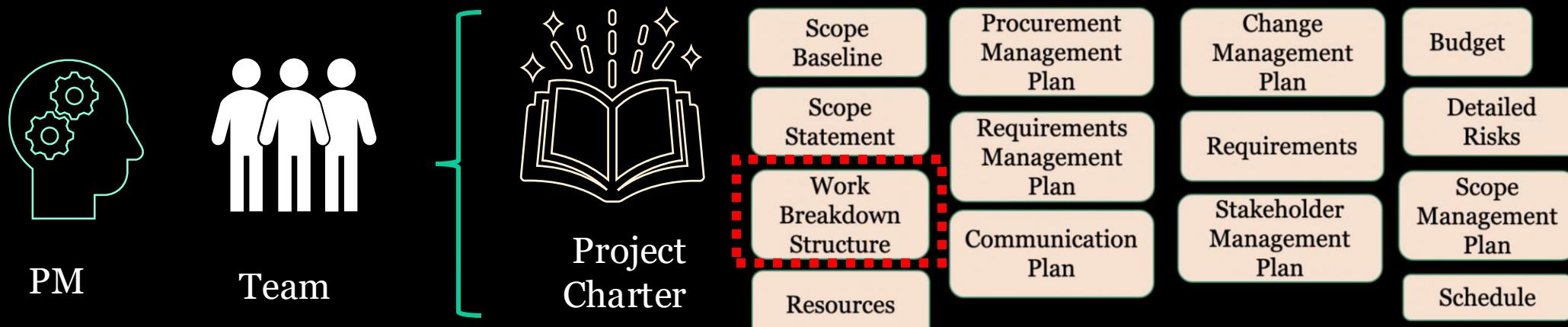
<https://www.youtube.com/watch?v=UIVWaUgqEAc&feature=youtu.be>

## 3 Executing Phase



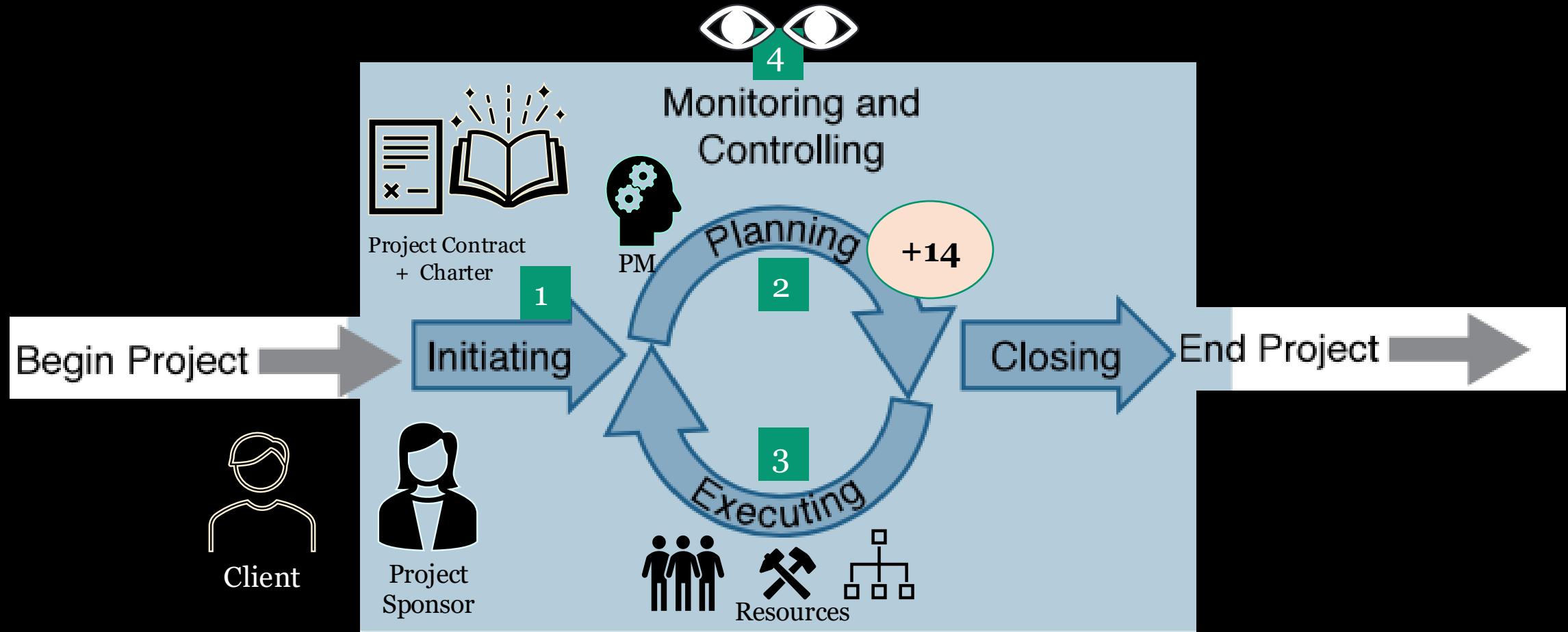
- Project Goal: Destroy the ring
- Project Requirements: Throw the ring into Mount Doom (a volcano)
- Project risks:
  - evil creatures search for the ring
  - Mt. Doom is far away (and heavily guarded)
  - the journey to Mt. Doom is dangerous and long
- Identifying the risks (and individual values are understood):
  - We can't do it
  - It has to be done
  - Who's going to lead?
  - What if we fail?
  - We can't fail
  - I'm right, you're wrong
- Final solution: Frodo will take the ring to Mt. Doom
- Build the Team & Gather the Resources: A group of misfits with a variety of weapons and skills will protect Frodo

### 3 Executing Phase



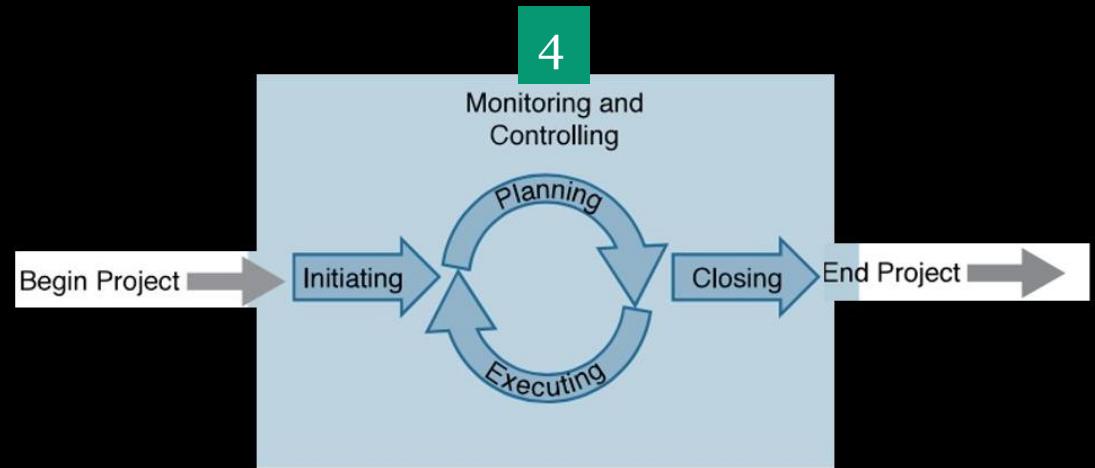
Once the project team and other stakeholders (client, project sponsor) understand the work ahead, especially the WBS, it's time to launch the next phase...

# PROJECT PHASES

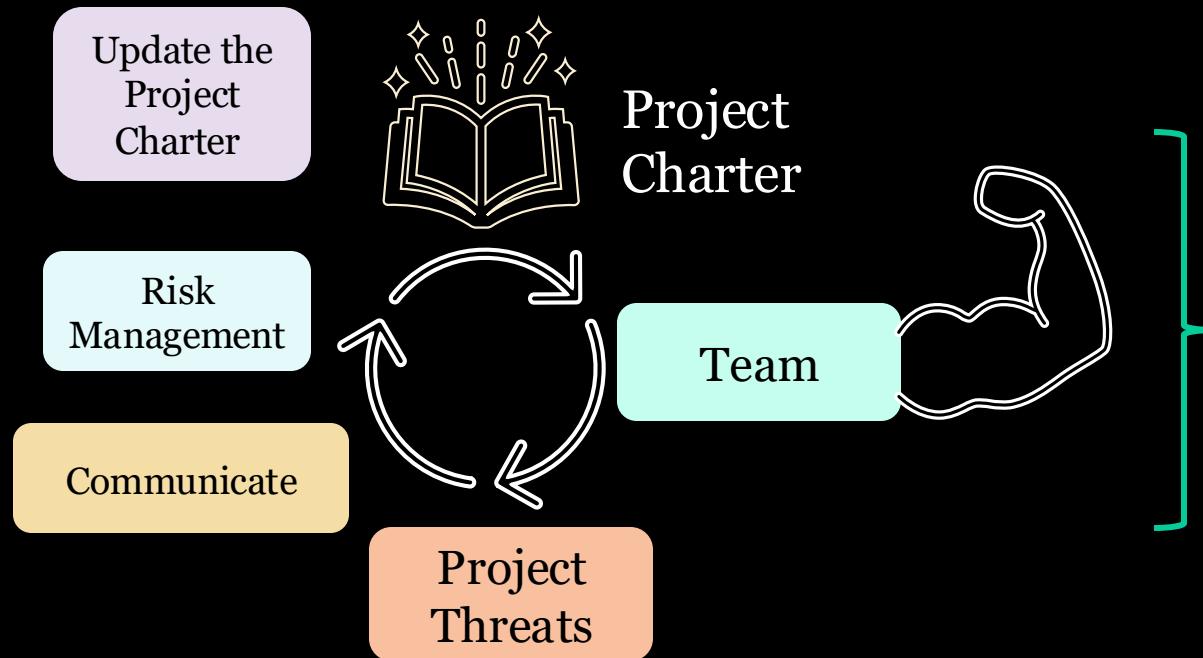


# 4 Monitoring & Controlling Phase

The **Monitoring & Controlling Phase** tracks, reviews, and organizes the project's progress



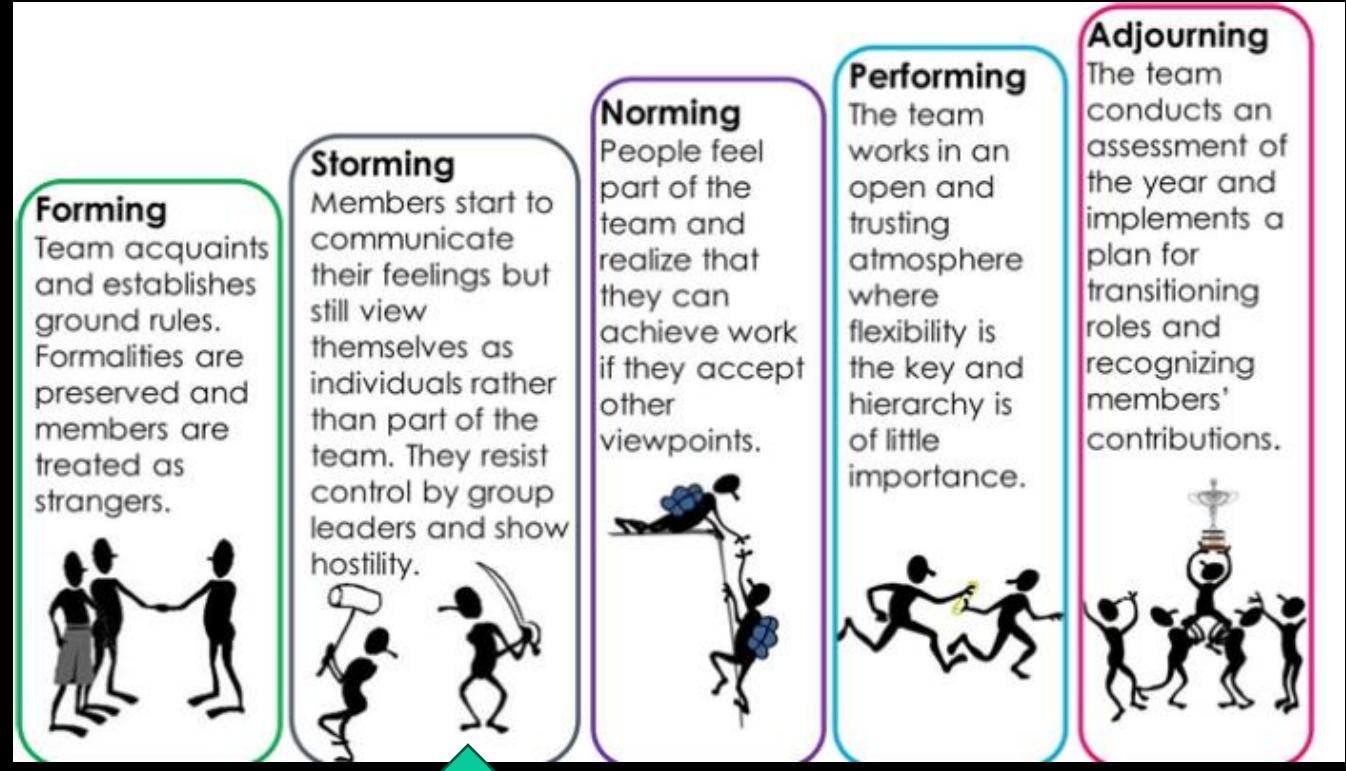
Project Manager monitors & controls the project



# Common Team Challenges

- Meeting deadlines
- Changing expectations from the client and/or external influences
- Team conflict
- Motivation/energy/self-care
- Budget
- Time

## Tuckman Ladder



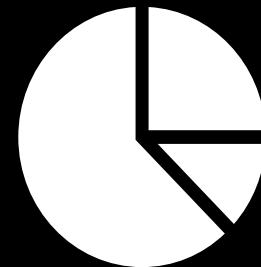
# Document! Document! Document!

The project manager (PM) manages the project's work, scope, schedule, budget, quality, communication, risks, and procurements

In these 5 key areas



Issues Log



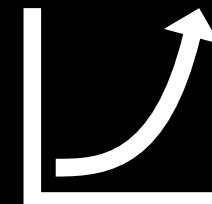
Performance  
Measuring &  
Reporting



Quality  
Assurance



Change Control



Budget

# Issues Log Example

| Issue Management Log |                  |          |                                                                                                                       |       |                           |                          |                                                                                                    |
|----------------------|------------------|----------|-----------------------------------------------------------------------------------------------------------------------|-------|---------------------------|--------------------------|----------------------------------------------------------------------------------------------------|
|                      |                  |          |                                                                                                                       |       |                           |                          |                                                                                                    |
| ID                   | Status           | Priority | Issue Description                                                                                                     | Owner | Estimated Resolution Date | Escalation Needed (Y/N)? | Impact                                                                                             |
| 001                  | Open             | Critical | Issues raised by board members about the business case are preventing the project moving out of the initiation stage. |       |                           | Yes                      | Potential project cancellation or significant delay.                                               |
| 002                  | Work In Progress | High     | The project is missing a system architect.                                                                            |       |                           | No                       | Delay to start of project design phase.                                                            |
| 003                  | Closed           | Medium   | Availability of human resources doesn't match the project resource plan.                                              |       |                           | Yes                      | May be forced to level the plan to fit resource availability which will delay target go live date. |
|                      |                  | Low      |                                                                                                                       |       |                           |                          |                                                                                                    |

# Issues Log Example

| ISSUE LOG: The Best Project   |                   |               |                                                                                                                                                |                                                                                                                                                                                                                                                            |          |                       |                     |
|-------------------------------|-------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------------------|---------------------|
| Date printed: 09 October 2014 |                   |               |                                                                                                                                                |                                                                                                                                                                                                                                                            |          |                       |                     |
| Issue No.                     | Date Identified   | Identified by | Details of Issue & Effect<br>(State issue effect and costs)                                                                                    | Issue History:<br>Specific Actions & Resolution<br>(date/who action)                                                                                                                                                                                       |          | Agreed Owner          | Date for Completion |
|                               |                   |               |                                                                                                                                                |                                                                                                                                                                                                                                                            |          |                       |                     |
| 1                             | 25 September 2014 | HARRY C       | Shortage of meeting rooms for the group discussions planned as part of the fact-finding phase. It is essential all the necessary people attend | 26/9 DB Site services to check the availability of meeting room at other local sites 5/10 DB Email reminder to Sue in regard of the office availability                                                                                                    | SUE S    | <b>7 October 2014</b> |                     |
| 2                             | 25 September 2014 | AHMED S       | Decision needed on who will represent Finance for this project                                                                                 | 30/9 Contact Daphne D regarding key user from Finance<br>30/9 DB Daphne has nominated Edward S as the key user from Finance                                                                                                                                | DAPHNE D | 30 September 2014     |                     |
| 3                             | 26 September 2014 | SALLY T       | It is suspected that the Group Treasury system will have to be upgraded as part of the project                                                 | 26/9 DB Check with IT whether Treasury needs upgrading<br>27/9 Greta to confirm with supplier whether Treasury has to be upgraded 4/10 DB The supplier have confirmed the upgrade is necessary, Finance need to confirm the number of user licences needed | DAPHNE D | <b>5 October 2014</b> |                     |
| 4                             | 26 October 2014   | DUNCAN M      | If the Chairman is to appear in the communications video for the project she must be given plenty of advance warning                           | 26/9 DB Check availability with LISA S 28/9 LISA S has promised to give a range of dates 30/9 LISA S reminded about the dates 4/10 LISA awaiting on Chairman for dates 8/10 LISA reminded about the need for dates and this is essential now               | LISA S   | 9 October 2014        |                     |
| 5                             | 4 October 2014    | INDIRA H      | The office furniture required for the new facility is available from the preferred supplier at 30% if the order is placed by 12th October      | 5/10 DB A special meeting of the Board is to be called to approve the £25k spend at discounted rates. 6/10 DB The Board approved the spend, Purchasing to raise Purchase Order and issue to supplier                                                       | DERMOT Q | 9 October 2014        |                     |
| 6                             |                   |               |                                                                                                                                                |                                                                                                                                                                                                                                                            |          |                       |                     |
| 7                             |                   |               |                                                                                                                                                |                                                                                                                                                                                                                                                            |          |                       |                     |

# Issues Log Example

| Likelihood<br>(1 to 5)           | Risk / Issue<br>Index Value | Owner                                                                                                                                                                                                                             | Mitigation | Mitigation<br>Target Date | Mitigated<br>Consequence                               | Mitigated<br>Likelihood                                    | Mitigation Index<br>Value | Current<br>Index<br>Value       | Action / Status History                                                                                                                        | Escalation |
|----------------------------------|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|---------------------------|--------------------------------------------------------|------------------------------------------------------------|---------------------------|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Scoring of<br>Risk<br>Likelihood | The Risk<br>Owner           | What is the plan to remove key hurdles / barriers to delivery and eliminating or reducing the risk.<br>Use plain language<br>Address the root cause of the risk<br>Keep the Mitigation under review to ensure it remains relevant |            |                           | Impact re-scored based on completion of the Mitigation | Likelihood re-scored based on completion of the Mitigation |                           | Current score based on progress | What is/are the specific actions to deliver the Mitigation and can confirm the current status.<br>Ensure action owners and times are assigned. |            |
| 4                                | ● 12                        | John Smith                                                                                                                                                                                                                        | Example A  | Nov-13                    | 2                                                      | 4                                                          | ● 8                       |                                 | Example A                                                                                                                                      |            |
| 1                                | ● 1                         |                                                                                                                                                                                                                                   |            |                           |                                                        |                                                            | ● 0                       |                                 |                                                                                                                                                |            |
| 5                                | ● 20                        |                                                                                                                                                                                                                                   |            |                           |                                                        |                                                            | ● 0                       |                                 |                                                                                                                                                |            |
| 3                                | ● 9                         |                                                                                                                                                                                                                                   |            |                           |                                                        |                                                            | ● 0                       |                                 |                                                                                                                                                |            |
|                                  | ● 0                         |                                                                                                                                                                                                                                   |            |                           |                                                        |                                                            | ● 0                       |                                 |                                                                                                                                                |            |
|                                  | ● 0                         |                                                                                                                                                                                                                                   |            |                           |                                                        |                                                            | ● 0                       |                                 |                                                                                                                                                |            |
|                                  | ● 0                         |                                                                                                                                                                                                                                   |            |                           |                                                        |                                                            | ● 0                       |                                 |                                                                                                                                                |            |

What happens when  
projects go wrong?

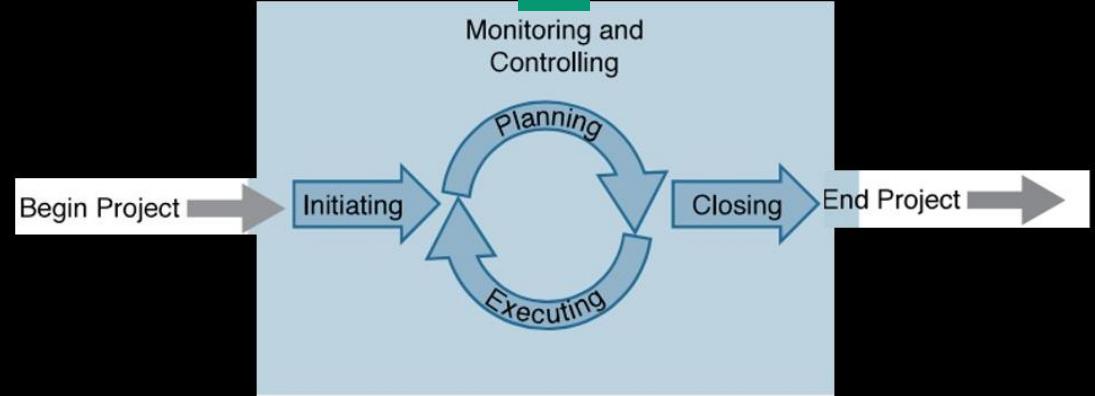
Do a Risk Assessment



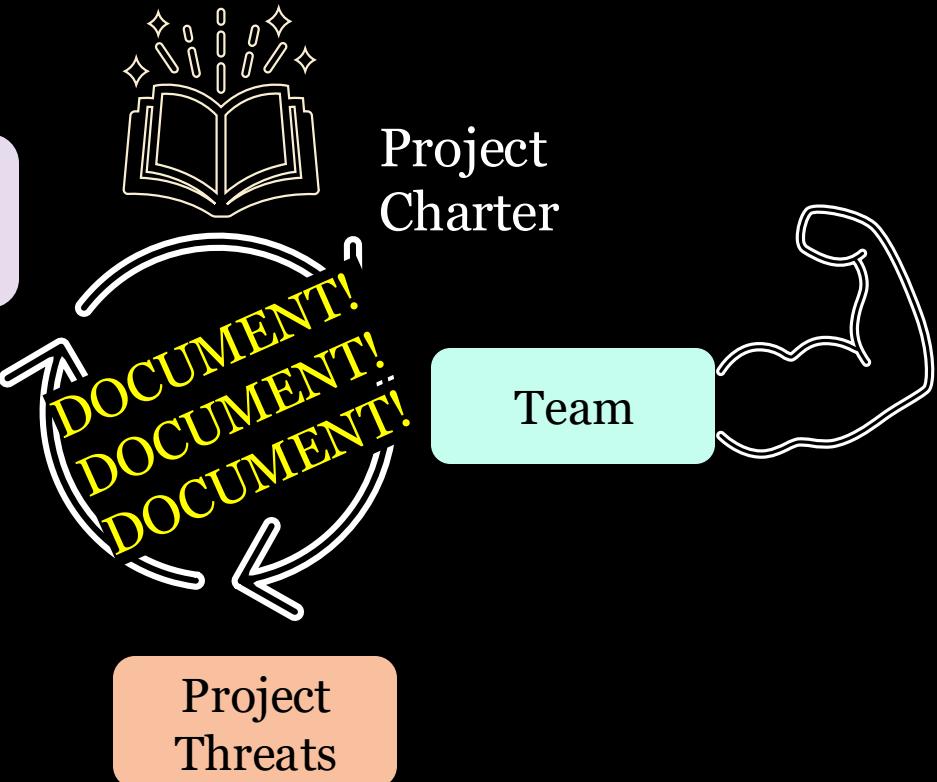
<https://www.youtube.com/watch?v=XLMDSjCzEx8>

# 4 Monitoring & Controlling Phase

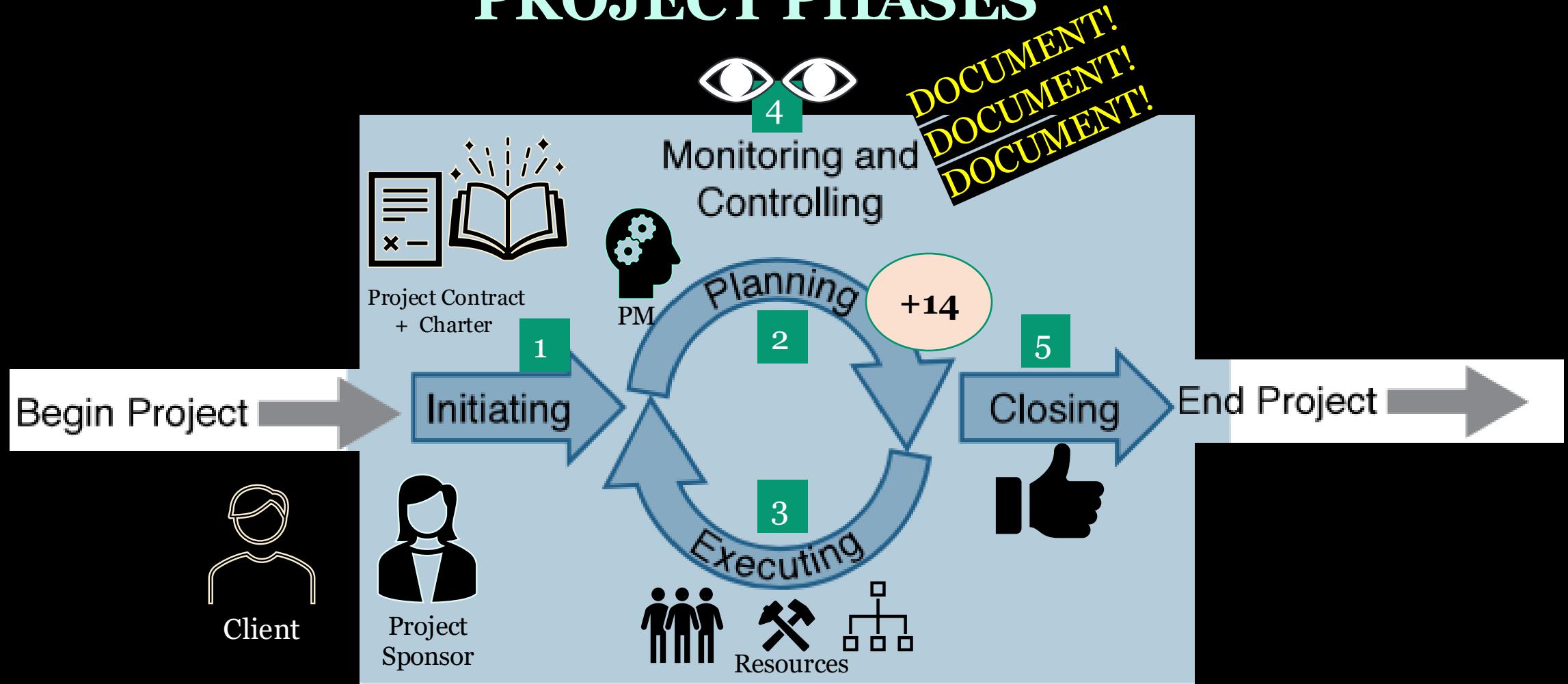
The **Monitoring & Controlling Phase** tracks, reviews, and organizes the project's progress



Project Manager monitors & controls the project

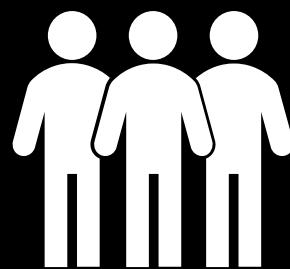
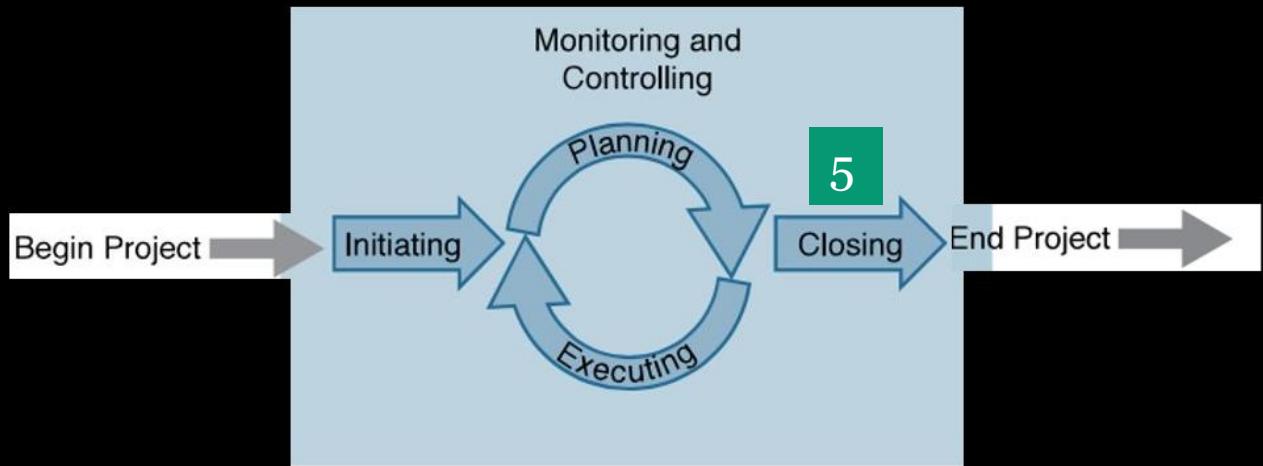


# PROJECT PHASES

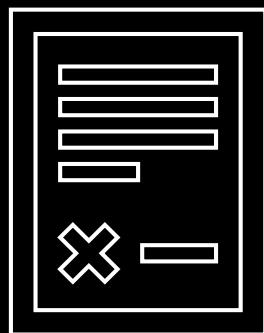


# 5 Closing Phase

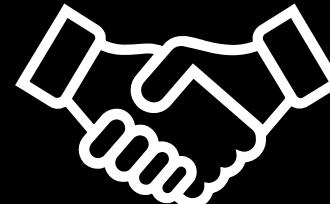
The **Closing Phase** completes all projects and formally closes the project.



Transition/Integration Plan



Project Sign-Off



Closing Contracts



Archiving Project Documents

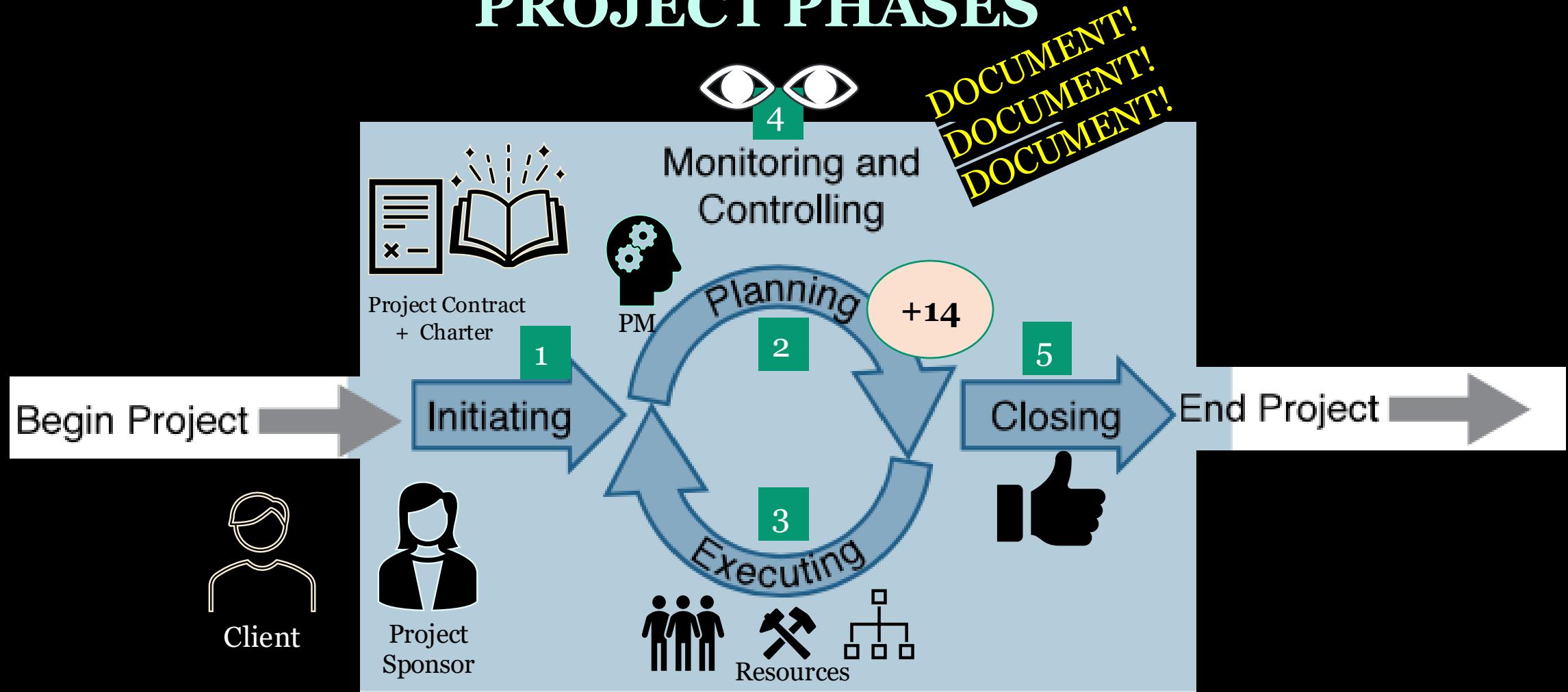


Releasing Resources

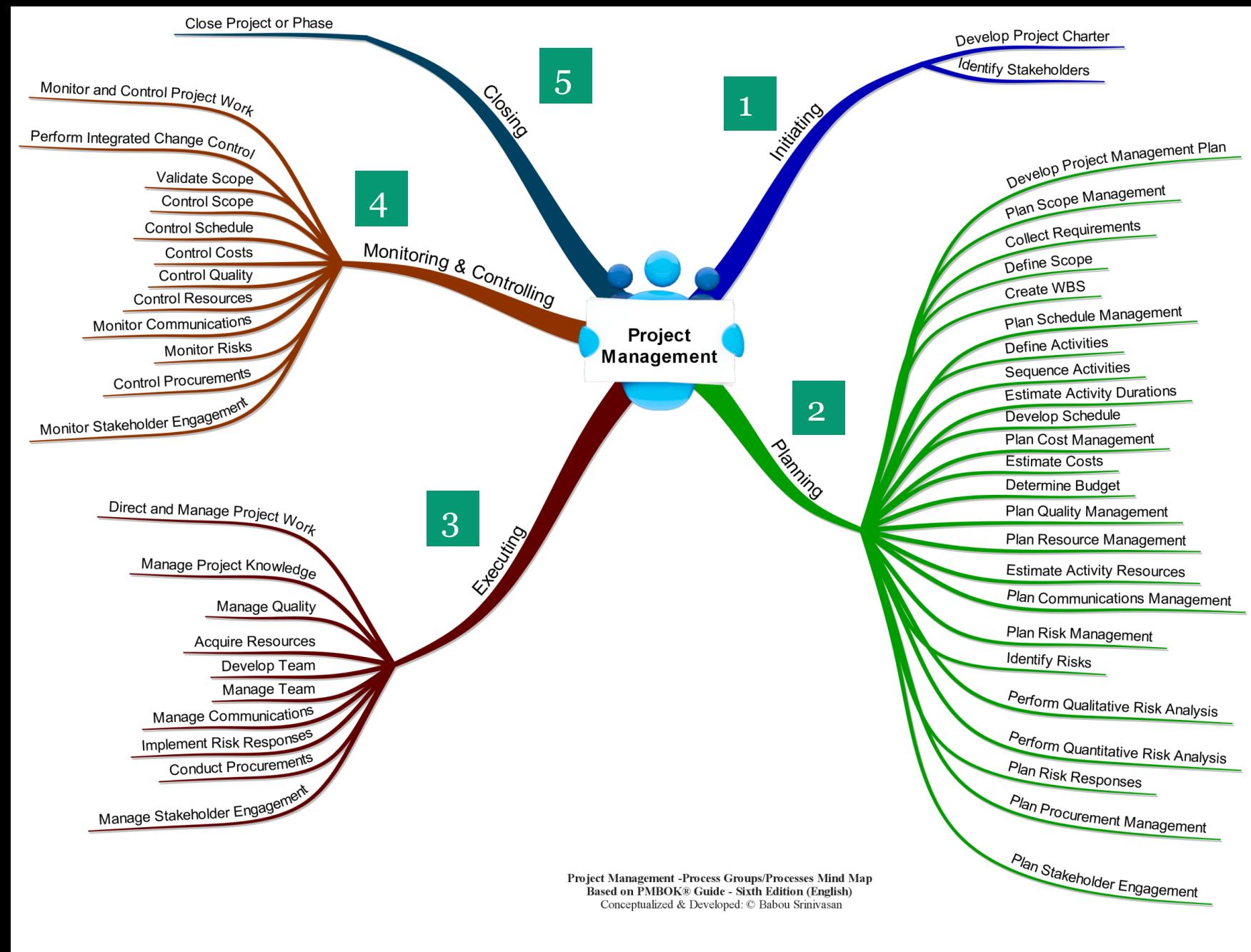


Lessons Learned

# PROJECT PHASES



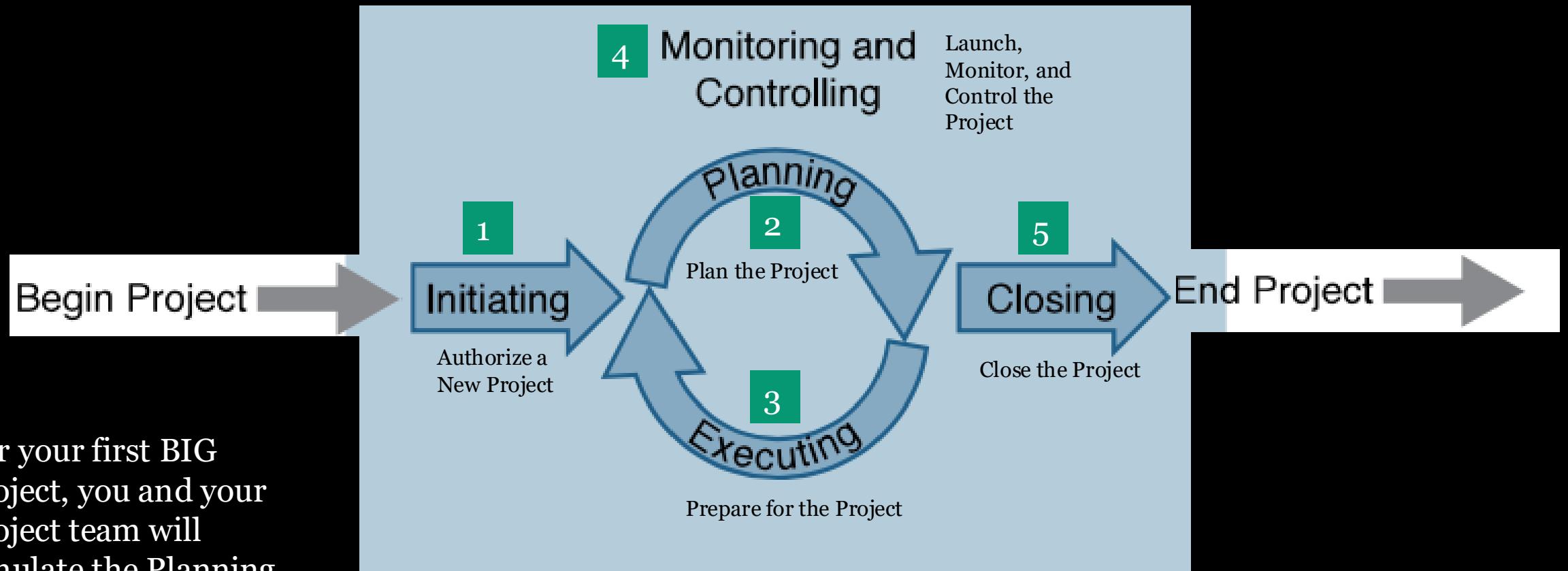
# Alternate Visual to the 5-phase framework



IN SUMMARY....

# PROJECT PHASES

The PMBOK project framework (or methodology) consists of 5 stages





# Learning Objectives

- Understand the difference between project, product, and program management
- Define "project"
- Define "program" and "portfolio"
- Identify the 5 phases of project management
  - Initiating
  - Planning
  - Executing
  - Monitoring & Controlling Phase
  - Closing