



PROJECT MANAGEMENT

Advanced

LEARNING LAB

PRESENTED BY

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PMP, PCM

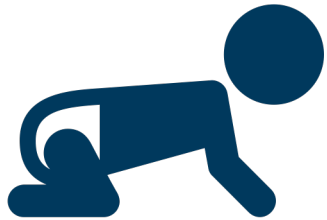


EAT YOUR CAREER



Your Progression

CRAWL



WALK



RUN



DANCE!



We Are Building On...





About Our Program

- Slides, chat log, Certificate of Attendance, replay videos and additional resources will be available in the **COURSE AREA** by **TUESDAY of next week**
- You have access to the Course Area for **1 year**
- Please be mindful of the **legal notice**
- Please **mute yourself** when I'm presenting
- I will pause regularly to **check for questions**
 - Open your mic/video or type your questions into chat any time
- I can **troubleshoot technical issues** with you during breaks



REMINDER!



Class Expectations

- Have fun!
- The Learning Lab is very **interactive and hands-on**
- Think creatively. This is your chance to **experiment!**
- **Breaks are scheduled**, but please feel free to do what you need

A long-exposure photograph of a multi-lane highway at night. The image shows vibrant, colorful light trails from vehicles, primarily in shades of red, orange, and yellow, stretching from the foreground towards the horizon. The road's lane markings are visible, and the overall scene conveys a sense of rapid motion and speed.

WE'RE MOVING VERY FAST!

Use your workbook and video replays for
future reference

Today's Agenda

Time	Program Component
10:00 AM to 10:30 AM <i>Eastern</i>	Welcome (30 Minutes) <ul style="list-style-type: none">• Program logistics• Topic introduction
10:30 AM to 12:00 PM <i>Eastern</i>	Training + Implementation (1.5 hours)
12:00 PM to 12:15 PM <i>Eastern</i>	Short Break (15 Minutes)
12:15 PM to 2:15 PM <i>Eastern</i>	Training + Implementation (2 hours)
2:15 PM to 3:00 PM Eastern	Lunch Break (45 Minutes)
3:00 PM to 5:00 PM <i>Eastern</i>	Training + Implementation (2 hours)
5:00 PM to ?	Wrap Up + Q&A + Networking <ul style="list-style-type: none">• Closing statements and next steps



Pre-Work Poll

1. Join LinkedIn Group and Introduce Yourself
2. Complete Pre-work Form (online)
3. Complete Project Management Leadership Style Self-Assessment & Reflection
4. Identify a project to use during the Lab





Project Leadership Styles

Dominant

- Results-oriented, directive

Influential

- People-oriented, persuasive

Steady

- Team-oriented, collaborative

Conscientious

- Data-oriented, analytical



Project Leadership Styles

- We all have a **natural style** and the ability to **adapt**
- Certain styles work better for certain types of projects (pg. 9)
- You may need to **temper your natural style and flex**

What style do you feel is most needed for your current project?



Introduction

The Advanced Project Manager...

Oversees more than one project at a time

- 15% = one project
- **59% = 2 to 5 projects**
- 11% = 6 to 10 projects



Introduction

The Advanced Project Manager...

Utilizes proven project management processes and frameworks

- 11.4% of organizational resources are wasted
- Organizations that use proven PM practices waste 28 times less money



Introduction

The Advanced Project Manager...

Manages teams of people (formally or informally) that may vary by project

- 30.5% = teams of 5 or fewer
- **39% = teams of 6 to 10**
- 30.5% = teams of more than 10



Introduction

The Advanced Project Manager...

Takes a disciplined approach in managing organizational resources

- 57% = fail to complete projects within established budget
- 71% = fail to complete projects on time



Introduction

The Advanced Project Manager...

Is a rare and valuable organizational asset

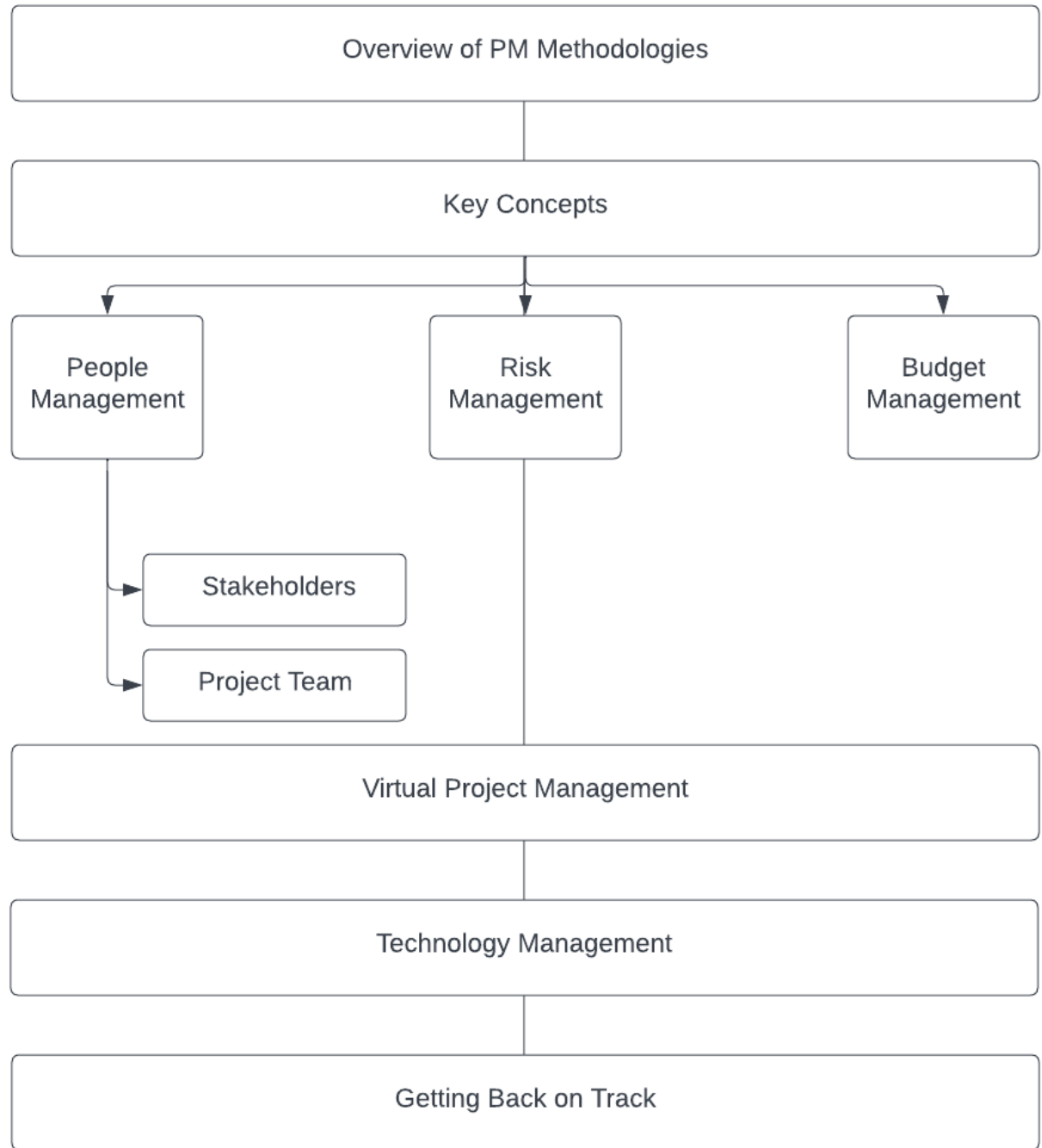
- 46% = project management cultural priority
- Failure to PM into strategies = higher project failure



The Project Manager Mindset

Task Oriented	Project Oriented
Short-Term	Long-Term
Completion Focused	Results Focused
Repetitive	Unique
Autonomous/Independent	Collaborative
Following Procedure	Creating Procedure
Individual Producer	Leader

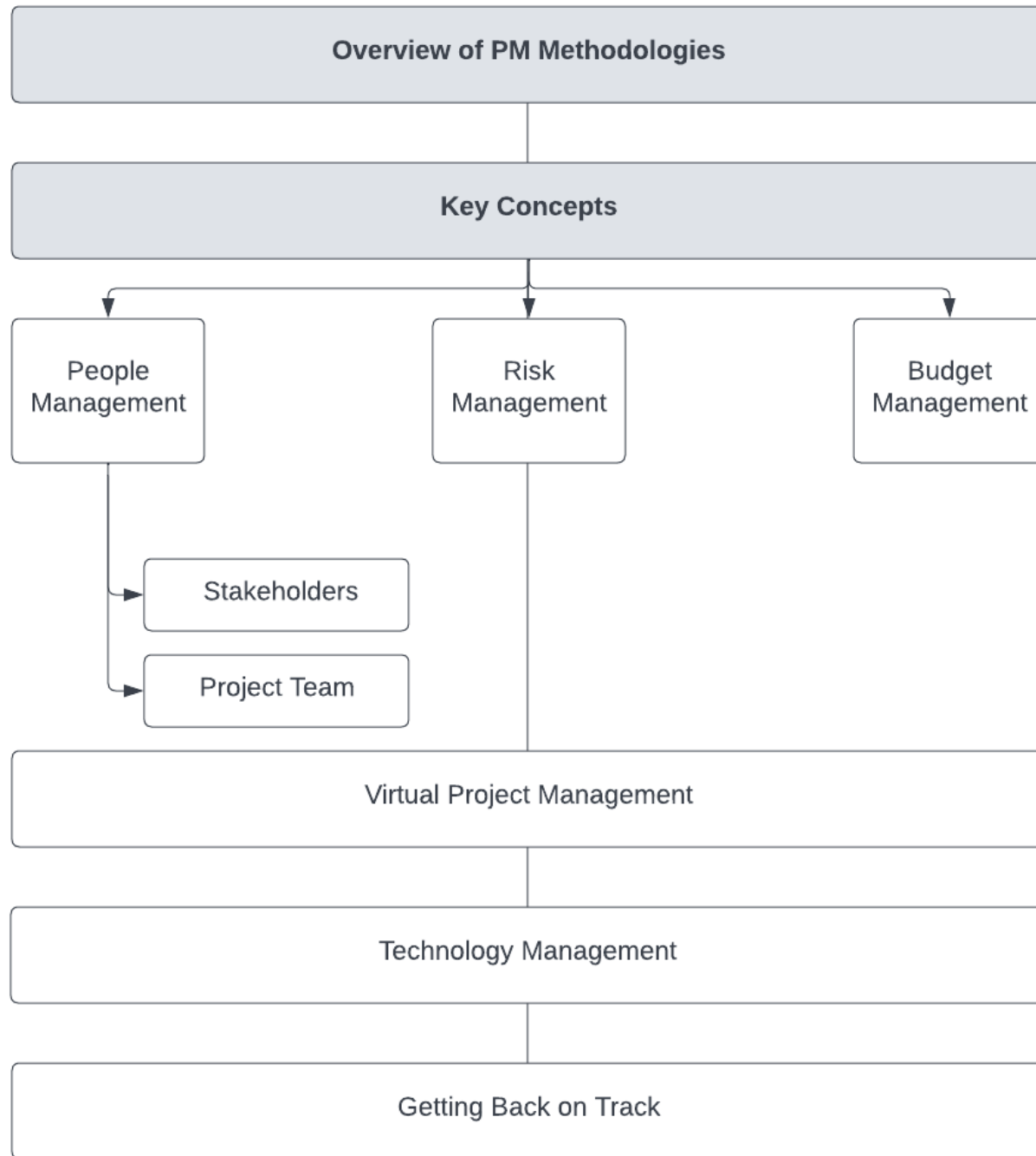
Which comes most naturally for you?



BLOCK 1

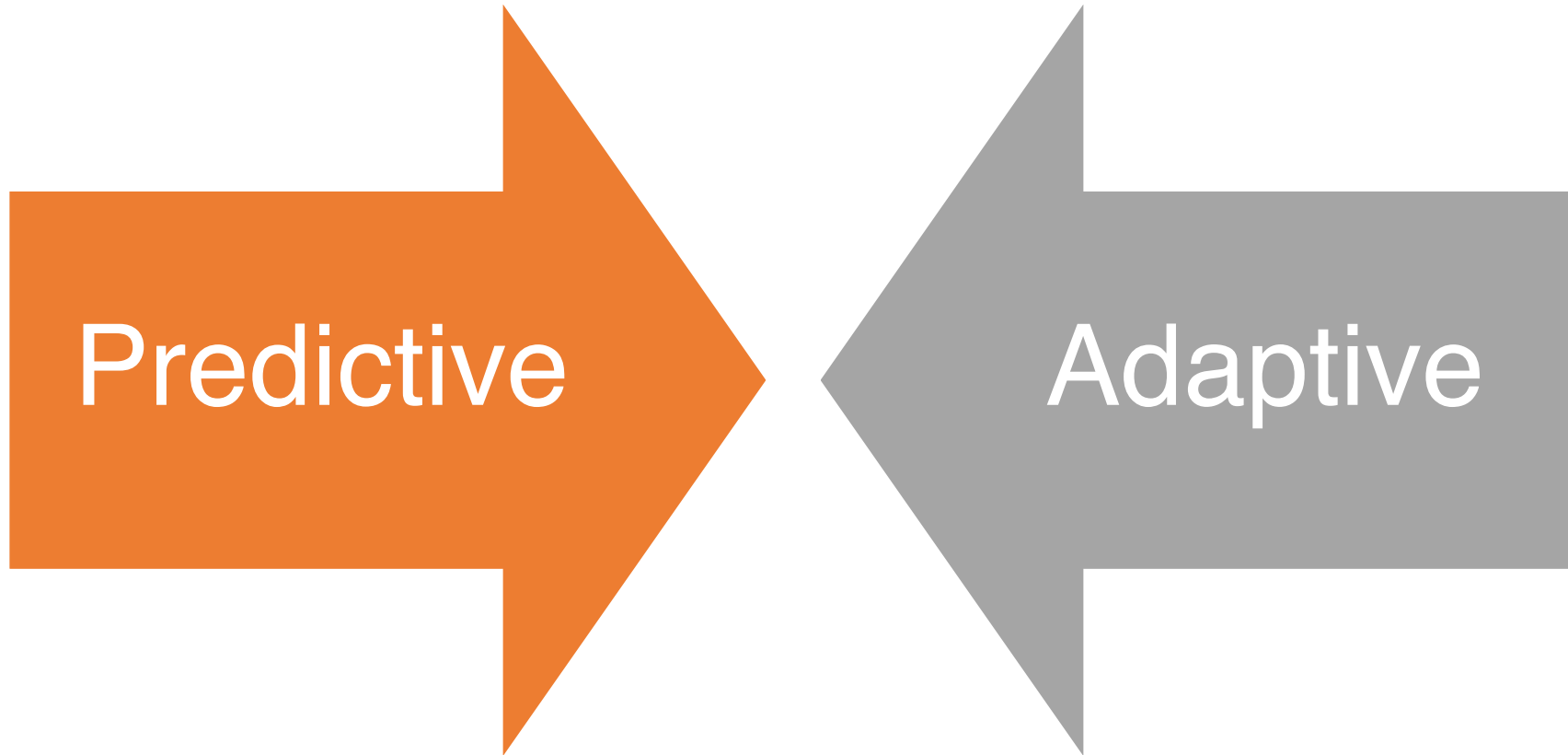
BLOCK 2

BLOCK 3





Overview of PM Methodologies





Predictive Methodology



Best for projects with clearly **defined scope, stable conditions** and specific **desired end-results**

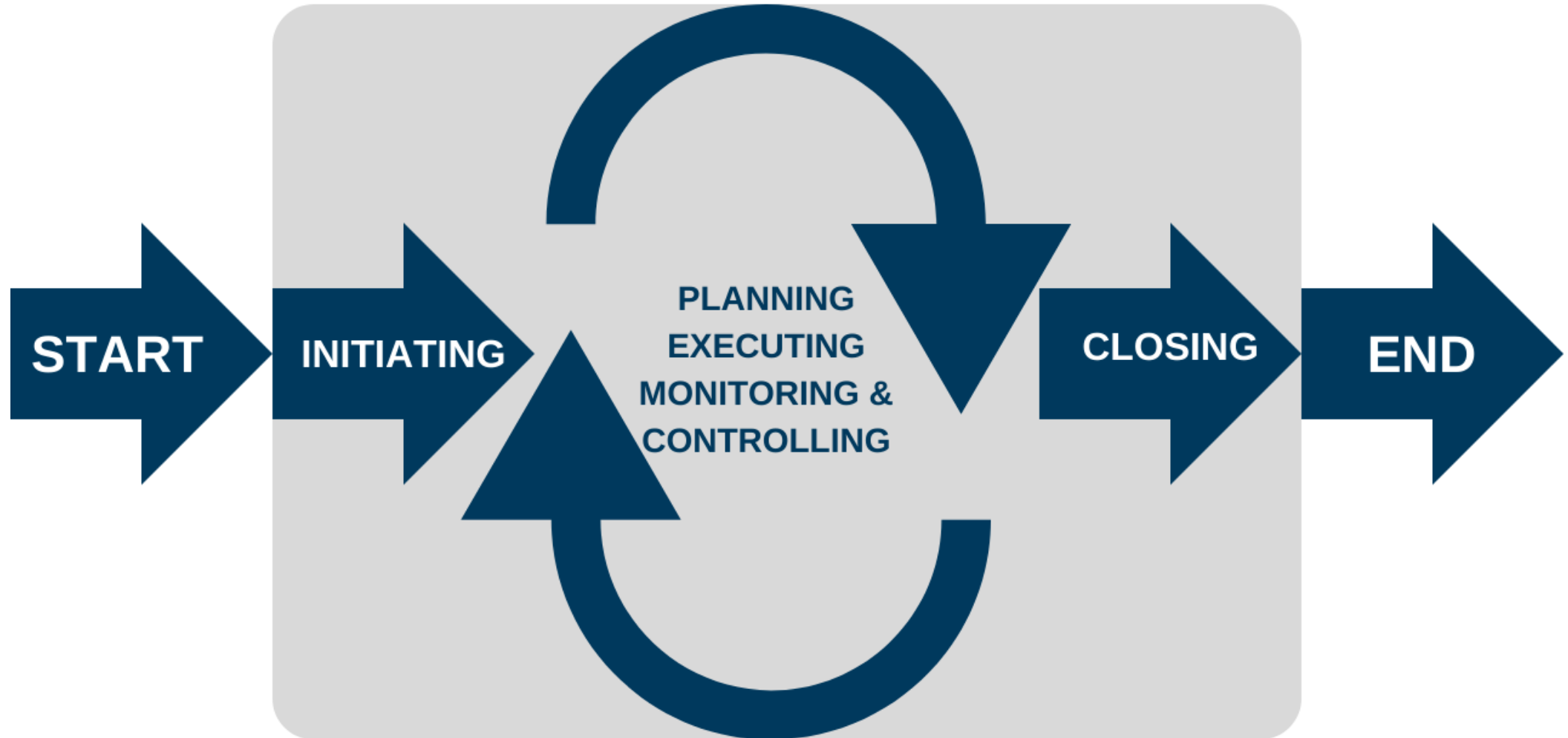


Adaptive Methodology

Agile Manifesto

Values + Principles (p. 17)

Best for projects with an **evolving scope**, frequently **changing conditions**, and **ambiguous end-results**



Comparison

	Predictive	Adaptive
Planning	A plan is created upfront	Planning is ongoing
Primary Focus	Process focus	People and business need focus
Scope	Fixed	Flexible
Time & Costs	Flexible	Fixed
Estimates	Provided up front	Evolve over time
Leadership	Command & control	Self-organization
Collaboration	Meetings	Daily stand-ups*
Teams	Large, coordinated by PM	Small, distributed
Owner Involvement	Limited, mostly at the beginning	Constant and throughout

	Predictive	Adaptive
Life Cycle	<p>Single life cycle</p> <p>Product delivered at the end</p>	<p>Iterative life cycle (Sprints*)</p> <p>Product delivered throughout</p>
Common Tools	<p>Milestones*</p> <p>Gantt Charts*</p> <p>Burndown Charts*</p>	<p>Kanban Board*</p> <p>Backlog*</p>
Project Charter*	<p>Created at project kickoff and once approved can't be updated</p>	<p>Living updatable document that serves as a roadmap</p>
Project Plan*	<p>Created at the start of the project; maps all details to completion</p>	<p>Created at the start of each iteration to identify next steps</p>

Comparison

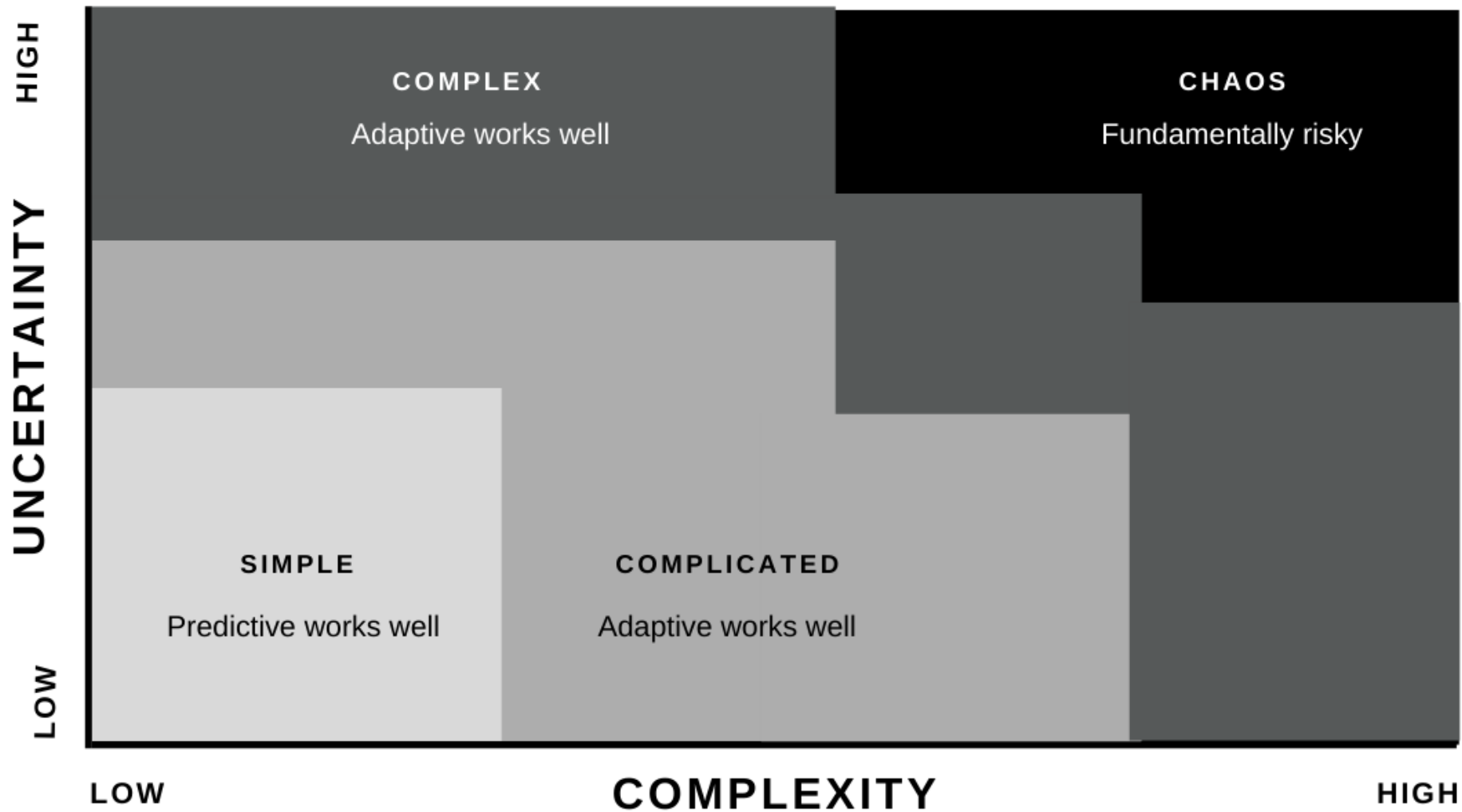
	Predictive	Adaptive
Project Work	Project work is linear and predictable	Project work is non-linear and unpredictable
Changes	Identify when project “off track” and get back “on track”	Identify changes in environment and adapt plan accordingly
Documentation	Abundant	Minimal
Improvement	End-of-project lessons learned	Continuous assessment and improvement End-of-sprint retrospectives*



Which
to use?

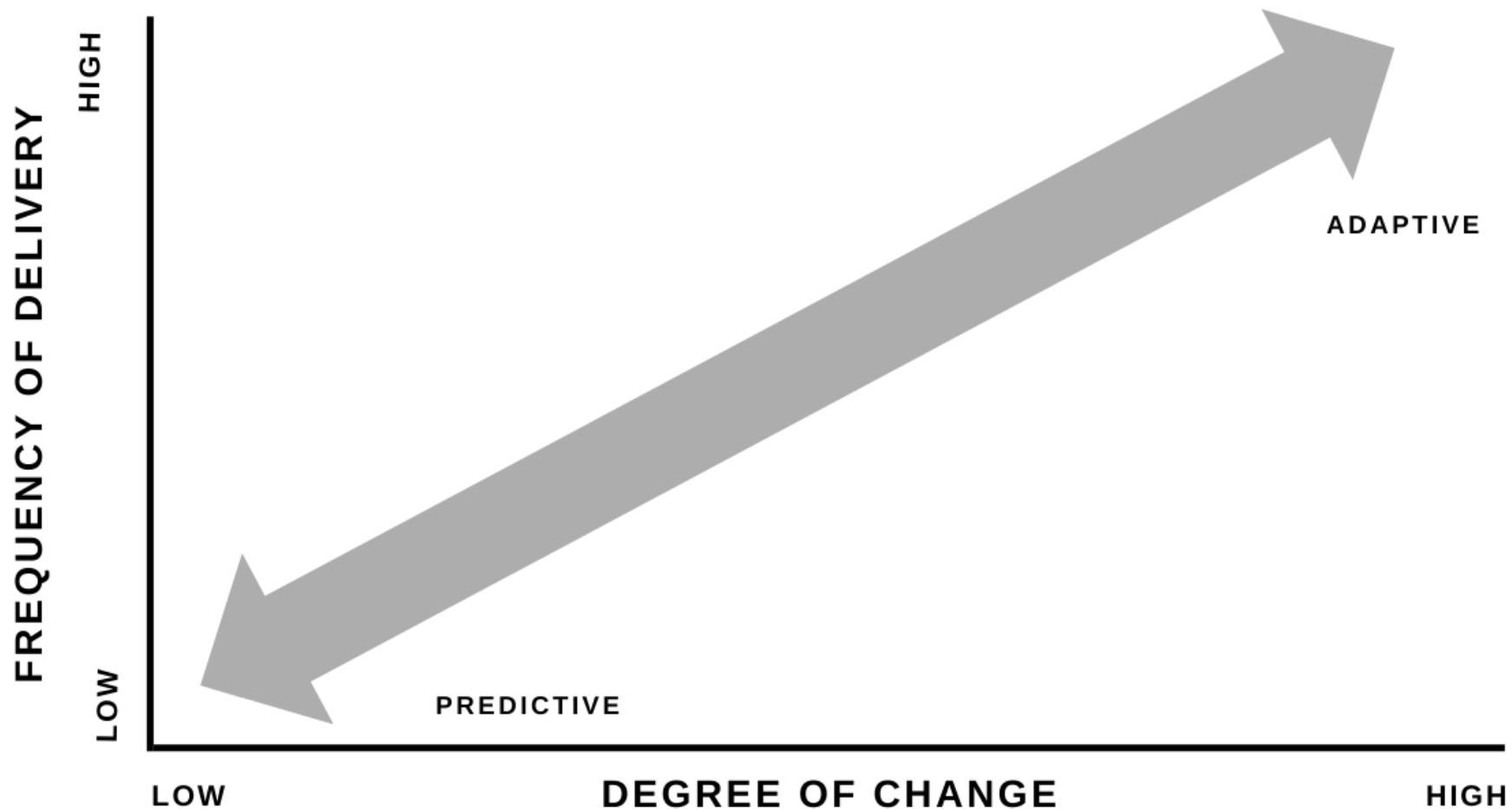


Considerations for Selecting an Approach





Considerations for Selecting an Approach





The Hybrid Approach



53% of organizations employ elements of adaptive methodology...

85% use **daily stand-ups**

81% use **end-of-sprint retrospectives**

79% use **sprint planning**

64% use **short iteration cycles**

Implementation Activity

Methodology Reflection Exercise

While working, please mute yourself.
If you have a question for Chrissy, please use chat.



Key Concepts



Cost



Time

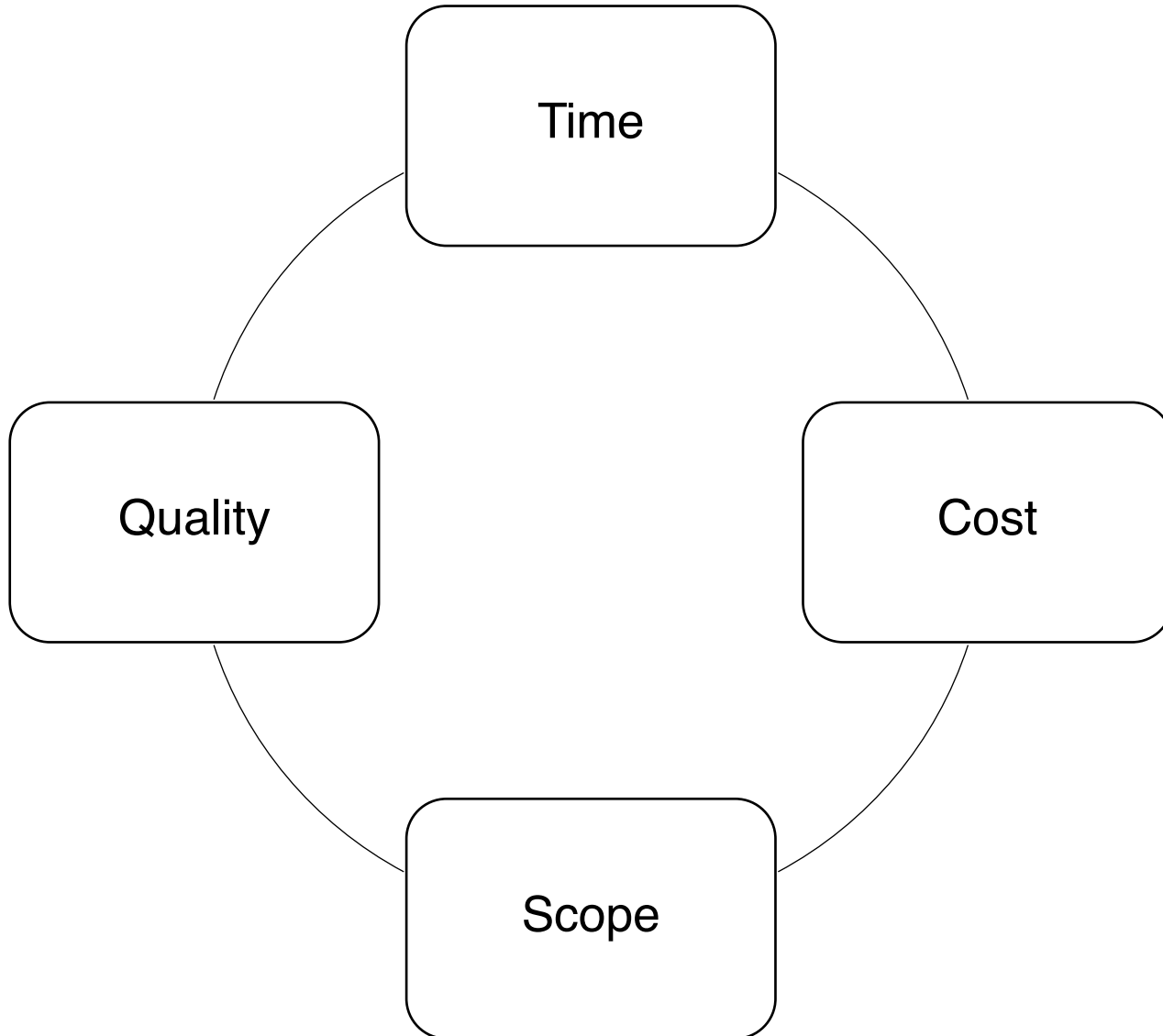


Scope



Quality








Triple Constraints (PMI standard)

If you want to maintain a consistent quality,
making a change to any one element will
impact the others




Quadruple Constraints

All elements are variable (including quality)
and changes to any impact the others

To MAINTAIN the same quality...




		
Scope	Time	Cost

If you increase the SCOPE but don't adjust the TIME, the COST will increase

		
Scope	Time	Cost

If you reduce the TIME but don't adjust the SCOPE, the COST will increase

To MAINTAIN the same quality...




		
Scope	Time	Cost

If you reduce the COST but don't reduce the SCOPE, the TIME will increase




		
Scope	Time	Cost

If you reduce COST and/or TIME, you must also reduce SCOPE

To INCREASE quality...




		
Scope	Time	Cost

SCOPE and COST must increase

		
Scope	Time	Cost

SCOPE and TIME must increase

To increase quality...

		
Scope	Time	Cost

SCOPE, TIME, and COST must increase

		
Scope	Time	Cost

If ALL decrease, QUALITY must decrease too



The Universal Laws of Nature





“If you have never recommended canceling a project, you haven’t been an effective project manager.”

WOODY WILLIAMS

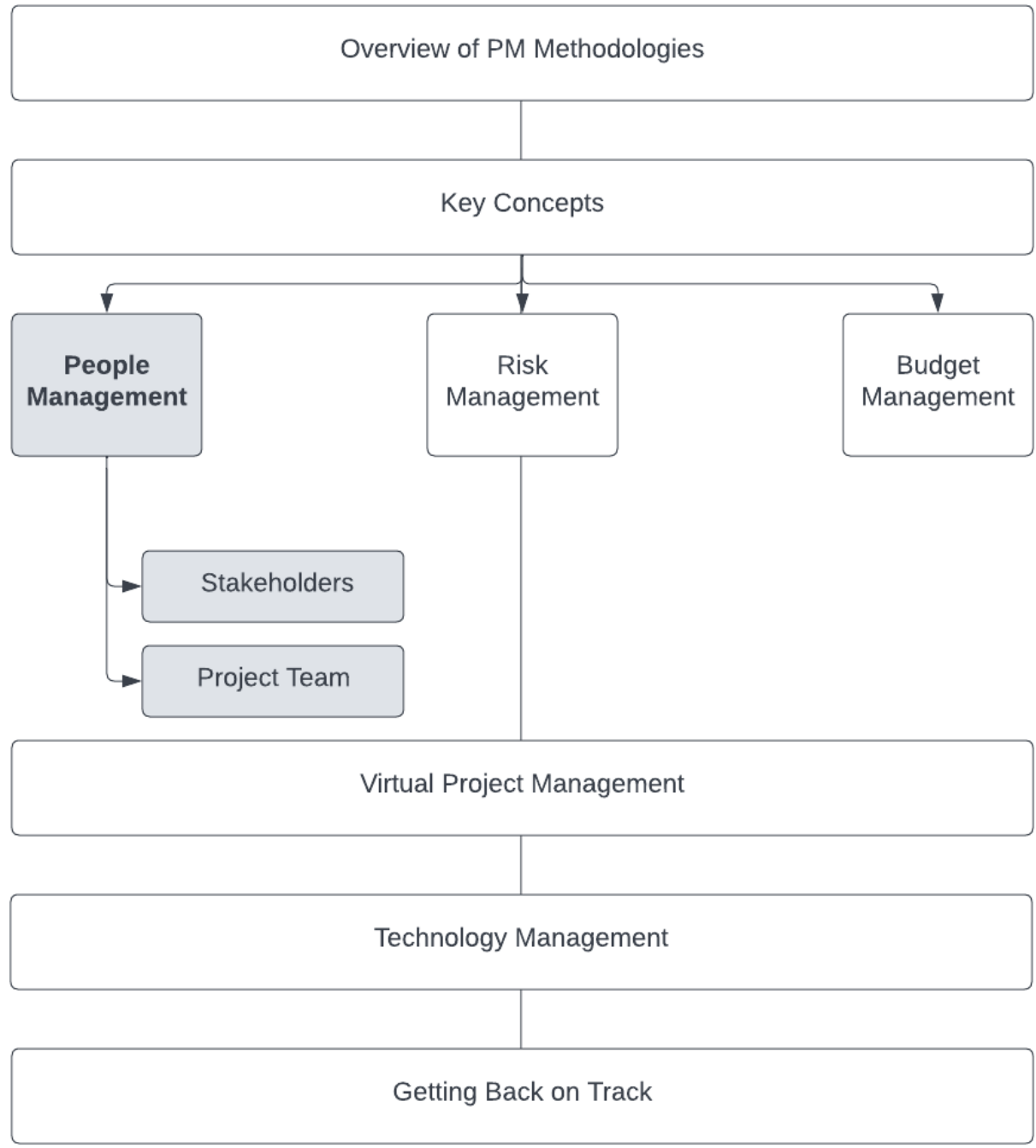
Integration Management

The skill of seamlessly coordinating all the many tangled and various aspects of a project





Questions & Comments



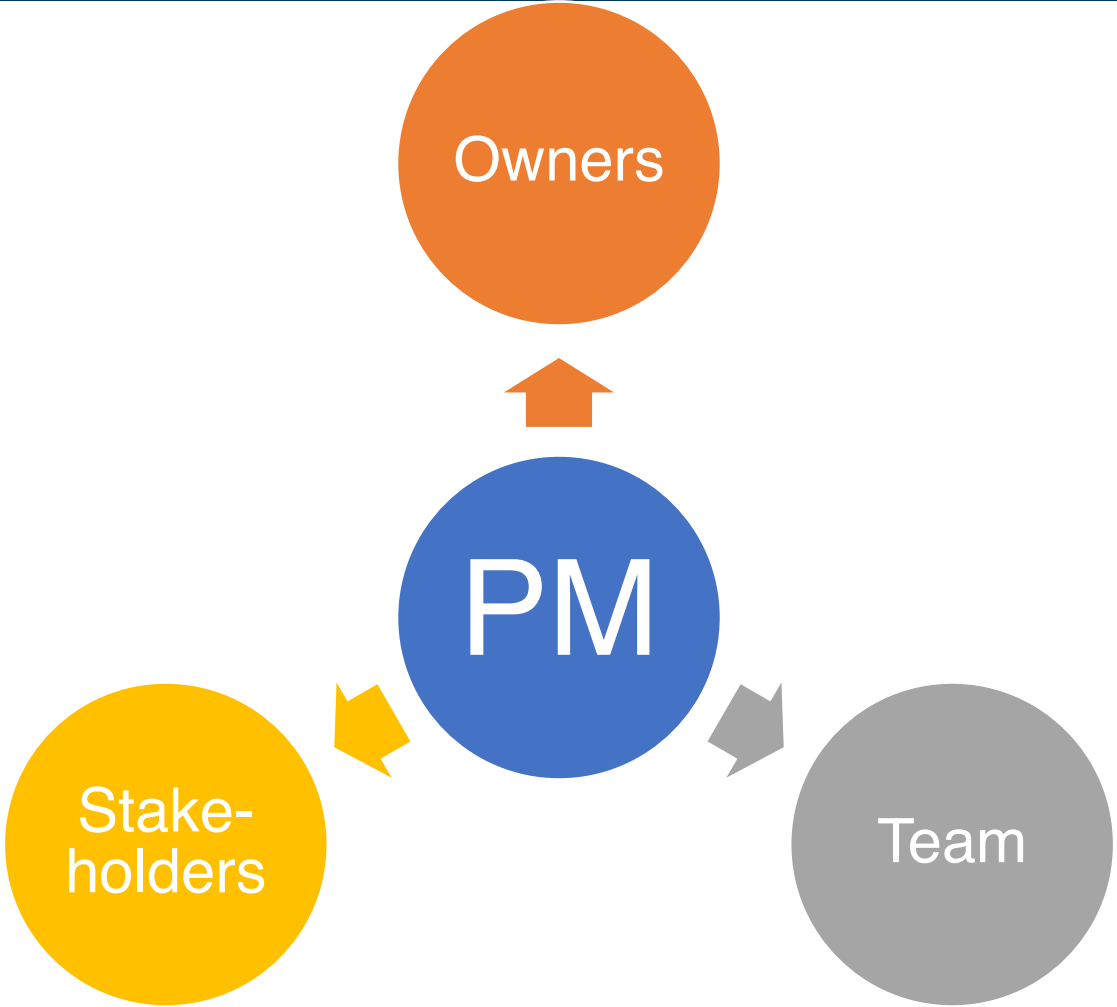


People Management

Stakeholders	Project Owner	The person or group initiating the project with ultimate responsibility for it
	Project Stakeholders	The person or group impacted by the project (internal and/or external)
	Project Team	The person or group responsible for doing the work on the project
	Project Manager	The person responsible for planning and coordinating all elements of the project

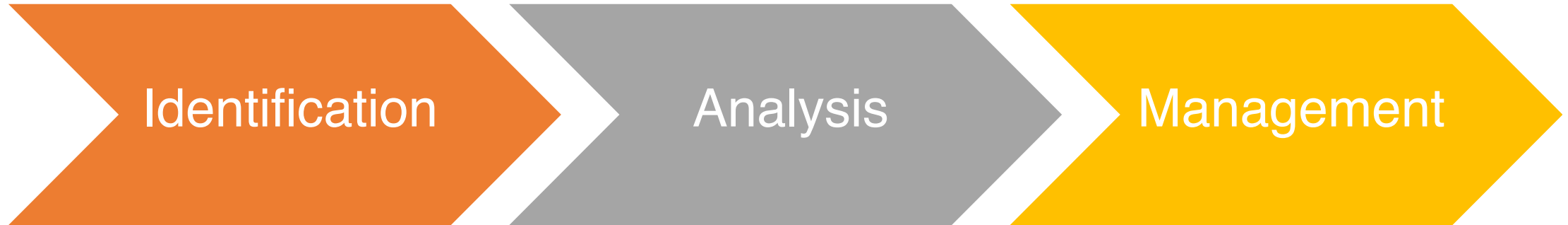


People Management



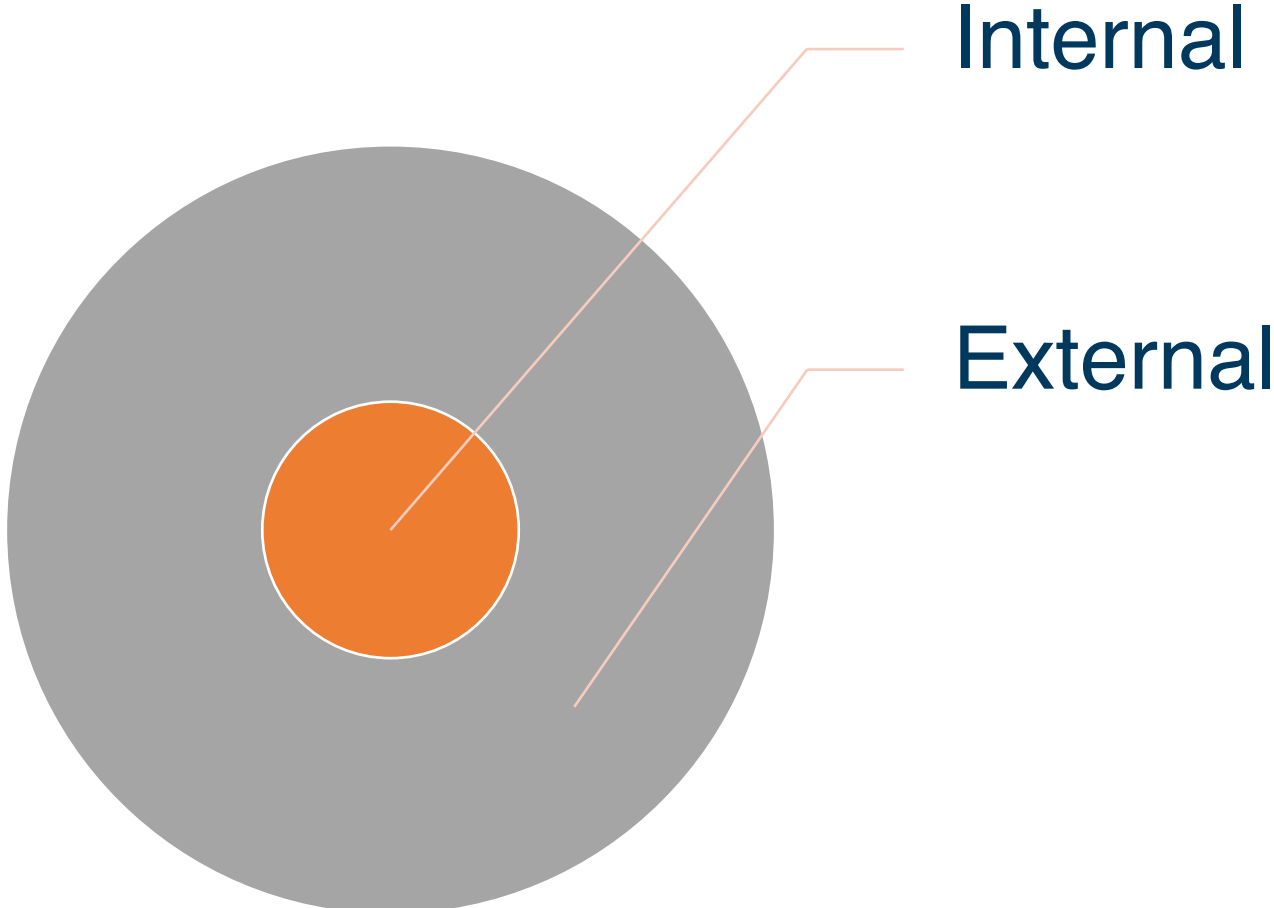


Managing Stakeholders





Stakeholder Identification





Stakeholder Analysis

Awareness

Interests /
Priorities

Perception

Preferences

Support /
Opposition

Resources

Influence



Stakeholder Analysis Worksheet

Stakeholder Analysis Worksheet

This is also provided as a downloadable worksheet with your course materials.

PROJECT: Establish new hire onboarding program for administrative professionals.

Name / Title	Marcos T. Wallace, VP of Learning & Development
Awareness	High
Interests/Priorities	High interest in training aspects of the new program. Wants to understand what role his team will play and ensure there is minimal overlap with other training offered.
Perception	Understands the importance of the initiative but sees it as a low-level priority for his team; is pleased to not be managing the project but wants to be involved.
Preferences	Would like weekly status updates provided via email and a representative from his team involved in all training discussions. His approval is required for all decisions that directly impact training.
Support/Opposition	Supportive of the initiative as a whole but resistant to adding more work for his team; willing to explore a peer training model to reduce burden on his team.
Resources	Curriculum Design: L&D team member will provide support for ensuring any new training developed as part of this project

Stakeholder Analysis Worksheet

PROJECT:

Name / Title	
Awareness	
Interests/Priorities	
Perception	
Preferences	
Support/Opposition	
Influence	

Sample + Template



Stakeholder Management

INFLUENCE		
	INTEREST	



Stakeholder Management

INFLUENCE	High Influence / Low Interest PARTICIPATION <u>Keep Satisfied</u> Anticipate Needs Check In Regularly	
		INTEREST



Stakeholder Management

INFLUENCE	<p>High Influence / Low Interest</p> <p>PARTICIPATION</p> <p><u>Keep Satisfied</u></p> <p>Anticipate Needs</p> <p>Check In Regularly</p>	<p>High Influence / High Interest</p> <p>PARTNERSHIP</p> <p><u>Actively Engage</u></p> <p>Inform Completely</p> <p>Involve Deeply</p>
	INTEREST	



Stakeholder Management

INFLUENCE	<p>High Influence / Low Interest</p> <p>PARTICIPATION</p> <p><u>Keep Satisfied</u></p> <p>Anticipate Needs</p> <p>Check In Regularly</p>	<p>High Influence / High Interest</p> <p>PARTNERSHIP</p> <p><u>Actively Engage</u></p> <p>Inform Completely</p> <p>Involve Deeply</p>
		<p>Low Influence / High Interest</p> <p>CONSULTATION</p> <p><u>Keep Informed</u></p> <p>Check In Frequently</p> <p>Involve Moderately</p>
	INTEREST	



Stakeholder Management

INFLUENCE	<p>High Influence / Low Interest</p> <p>PARTICIPATION</p> <p><u>Keep Satisfied</u></p> <p>Anticipate Needs</p> <p>Check In Regularly</p>	<p>High Influence / High Interest</p> <p>PARTNERSHIP</p> <p><u>Actively Engage</u></p> <p>Inform Completely</p> <p>Involve Deeply</p>
	<p>Low Influence / Low Interest</p> <p>MANAGEMENT</p> <p><u>Monitor</u></p> <p>Essential Information</p> <p>Minimal Contact</p>	<p>Low Influence / High Interest</p> <p>CONSULTATION</p> <p><u>Keep Informed</u></p> <p>Check In Frequently</p> <p>Involve Moderately</p>
	INTEREST	

Where would Marcos T. Wallace, VP of Learning & Development fall on this grid and why?



Implementation Activity

Stakeholder Management

Consider the various stakeholders involved in one of your current projects. Use the Interest/Influence Grid in your workbook or the downloadable template available in your course materials.

While working, please mute yourself.

If you have a question for Chrissy, please use chat.

#FALLONTONIGHT

UP TOP!

Managing the Project Team





Bigger = Not Always Better

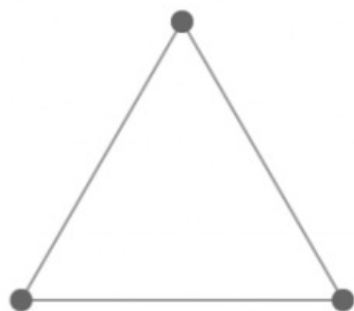




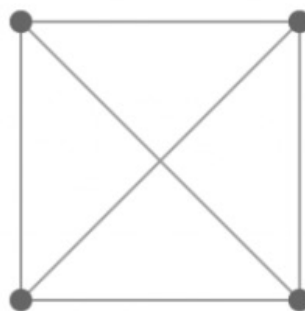
Communication Complexity

Brooks's Law

Communication becomes exponentially more complex and time consuming with each new person added to the team



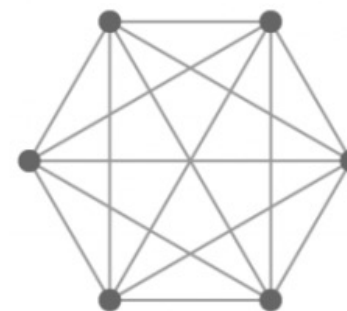
3 people, 3 lines



4 people, 6 lines



5 people, 10 lines



6 people, 15 lines



The Goal

A diverse group of smiling business professionals in an office setting, including a woman with glasses and a man in a suit, looking towards the camera.




Include the **right number** of people with the **right skills** to work on the **right things** at the **right time**

Delegation Strategies




“Leadership is the art of getting someone else to do something you want done because he wants to do it.”

DWIGHT D. EISENHOWER



		
Motivation	Ability	Availability




This is the ideal situation! Allocate work, be a resource and help them be successful.

		
Motivation	Ability	Availability

Help them **understand the value** of the project and the **need for their participation**.

		
Motivation	Ability	Availability

Expand your timeline (if possible) to allow time for learning.

		
Motivation	Ability	Availability

Adjust your timeline (if possible) to make it work for them.



Communicating Responsibilities





RAM/RACI Matrix

Responsible

- People who **do the work** to complete the task.

Accountable

- People who **delegate, review** the work, and **make decisions**. All tasks should have one (and only one) person accountable.

Consult

- People who **provide input** and **feedback** on the work.

Inform

- People who should **be informed** of progress.

- Sue = Executive Assistant and Project Manager
- Peggy = Executive Assistant
- Jill = HR Coordinator
- Marcos = VP of Learning & Development

Activity	Sue	Peggy	Jill	Marcos
Develop new hire roadmap	R	I	A	C
Outline new hire mentorship program	A	R	C	I
Develop new hire training materials (job specific)	R	R	I	A
Develop new hire training materials (HR)	C	C	A/R	C
Hold focus group with admins and gather feedback	A	R	I	I
Add new hire training materials to LMS	R	R	I	A
Develop new hire communication materials	A/C	R	C	I
Identify pilot new hire group	A/R	C	C	I
Conduct pilot new hire orientation	A	R	R	I
Review feedback from pilot orientation and revise program as needed	A	R	C	C
Develop operating procedures for fully implementing program	A/C	R	C	C

Implementation Activity

RAM/RACI Matrix

Define 3 tasks from your current project. Identify people **responsible** and **accountable**, and people to **consult** and/or **inform**.

While working, please mute yourself.

If you have a question for Chrissy, please use chat.





Variations on RACI

RASCI

- Responsible
- Accountable
- Support
- Consult
- Inform

CARS

- Communicate
- Approve
- Responsible
- Support

DACI

- Drivers
- Approvers
- Contributors
- Informed

CLAM

- Contribute
- Lead
- Approve
- Monitor



Delegation Best Practices

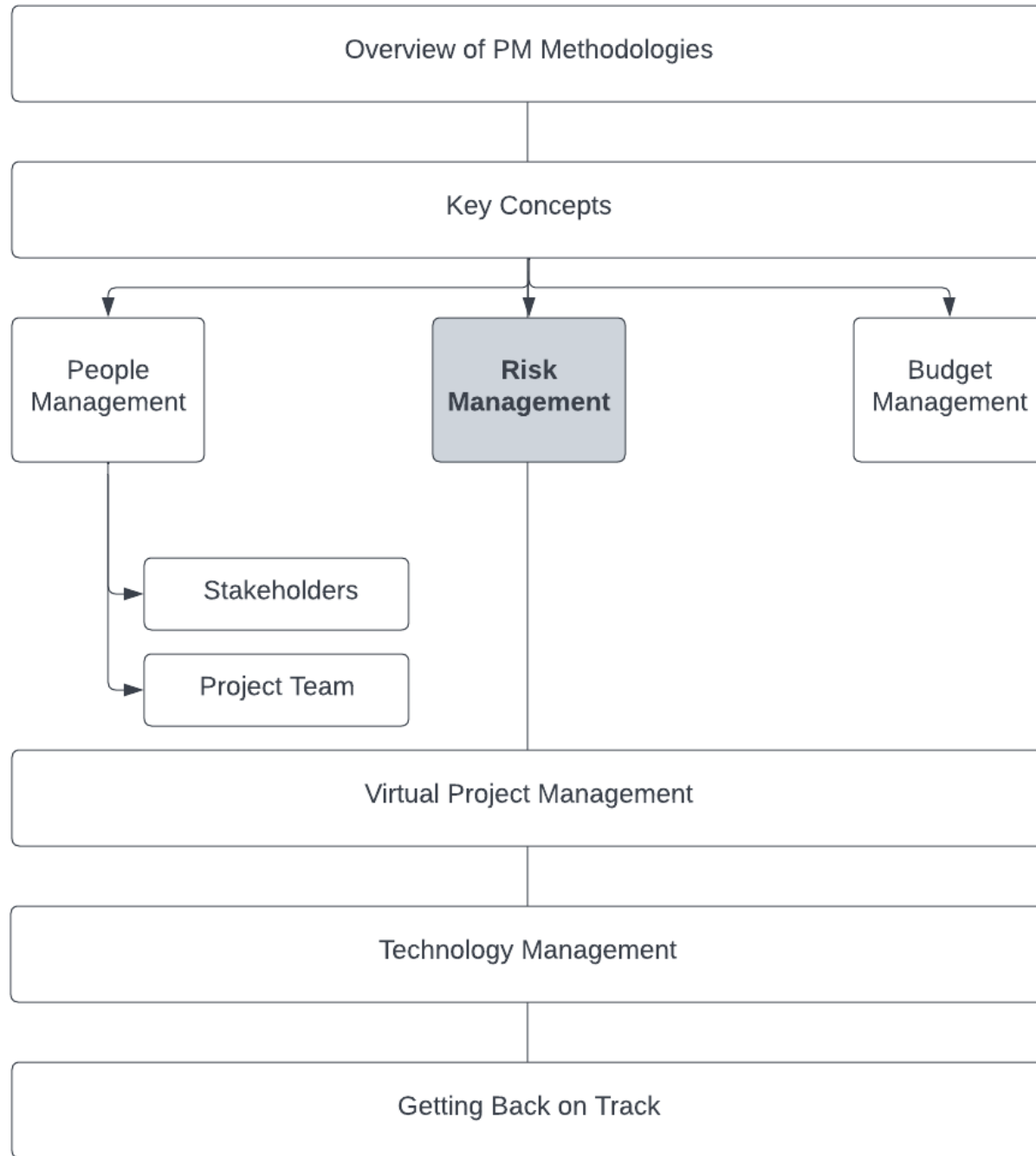
- Desired outcome
- Constraints, boundaries, expectations
- Responsibility and authority
- Lowest possible organizational level
- Understanding and commitment
- Follow up procedures
- Ongoing support and availability



Leading Project Meetings

- Define purpose
- Start/end on time
- Agenda
- Materials for review
- Invite only
- Take notes
- Next steps
- Follow up

Anything else you would add?



Risk Management

Identify

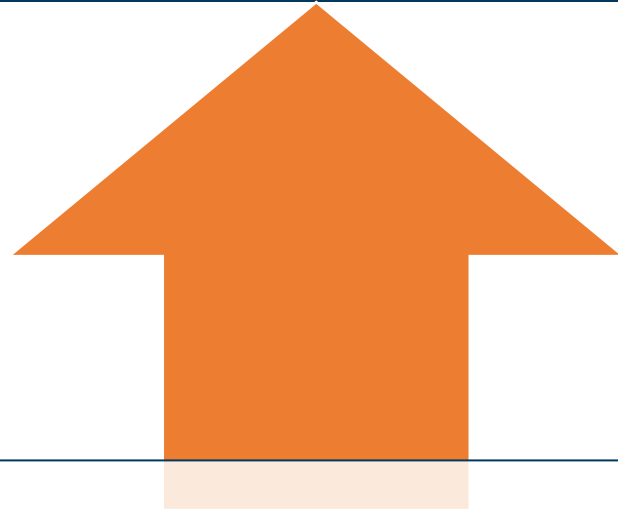
Assess

Manage

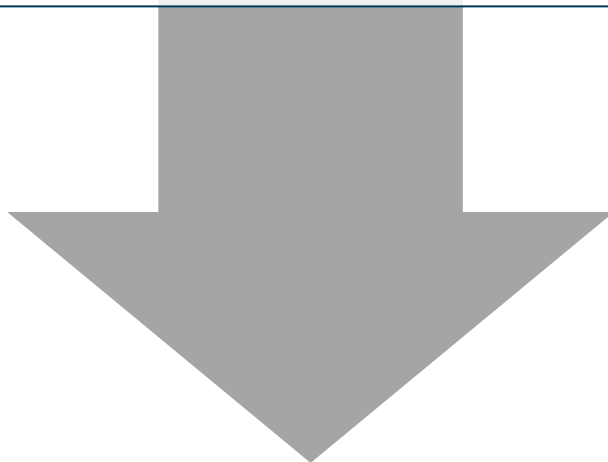




Identify Risks



Anything that exposes your project to an unexpected result





Types of Risks

Individual Project Risk

An uncertain event or condition that, if it occurs, has a positive or negative effect on one or more project objectives.

Overall Project Risk

The effect of uncertainty on the project as a whole, resulting in variations in project outcomes, both positive and negative.



Types of Risks

Technology

Communication

Cost

Scope

Operational

Procurement

Performance



Assess Risk

		CONSEQUENCE				
		Negligible	Minor	Moderate	Major	Catastrophic
LIKELIHOOD	Almost Certain > 90%	MODERATE	HIGH	EXTREME	EXTREME	EXTREME
	Likely 50-90%	MODERATE	HIGH	HIGH	EXTREME	EXTREME
	Possible 10-50%	LOW	MODERATE	HIGH	HIGH	EXTREME
	Unlikely 3-10%	LOW	MODERATE	MODERATE	HIGH	HIGH
	Rare < 3%	LOW	LOW	LOW	MODERATE	MODERATE



Manage Risk

- ✓ Accept ← Passive or Active
- ✓ Avoid
- ✓ Exploit ← Positive Risks
- ✓ Escalate
- ✓ Mitigate
- ✓ Share
- ✓ Transfer

Implementation Activity

Risk Management

Explore the risks associated with a current project.

While working, please mute yourself.

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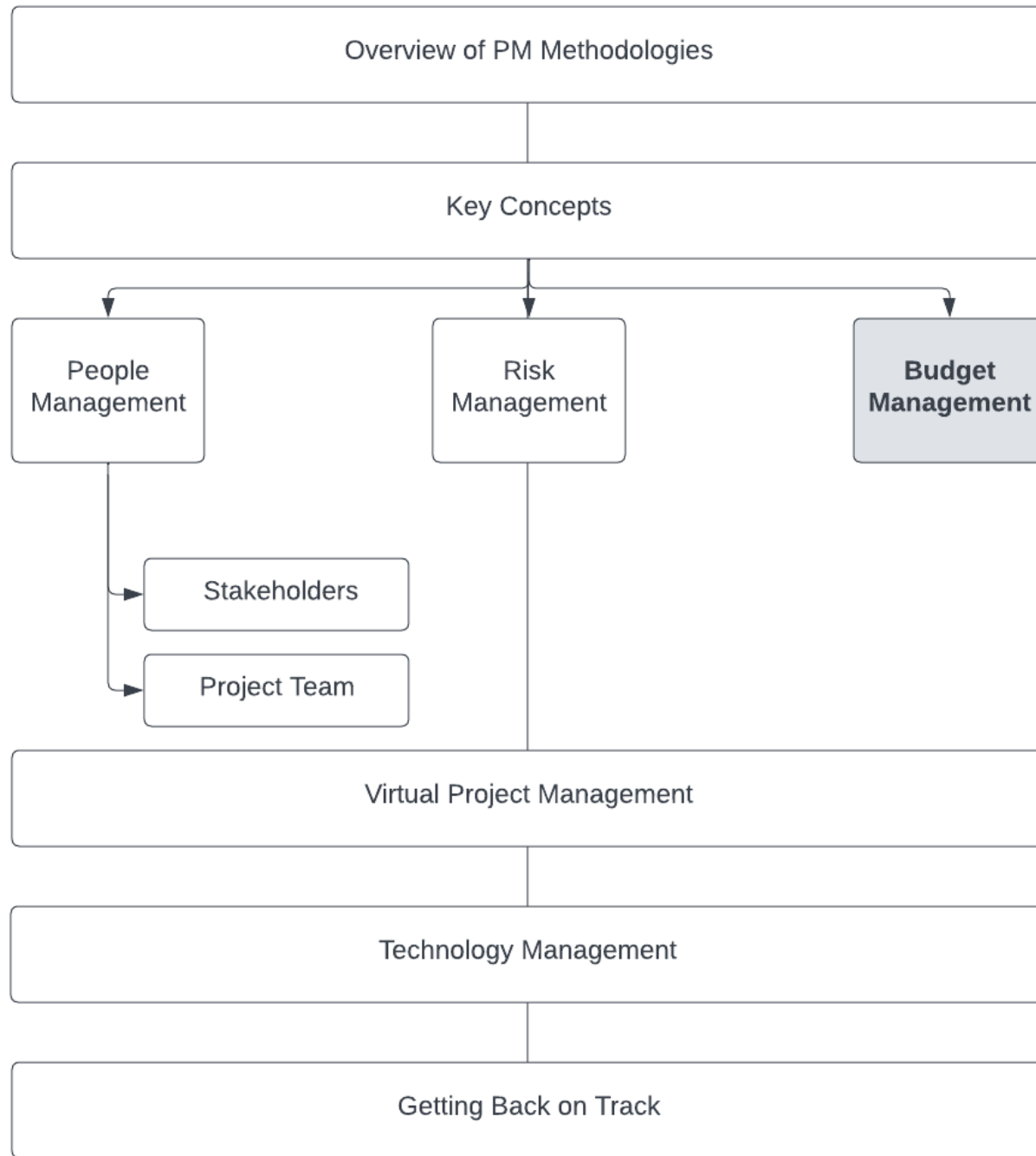


Risk Register

A document that helps capture and organize all the vital information related to risks in one central location

Risk Description	Likelihood	Consequence	Response	Owner
Supply delivery is delayed	Likely	Major	Identify back-up suppliers Create contingency plan to move forward with other parts of the project	CS
Machinery breaks down	Possible	Catastrophic	Increase quality inspections Upgrade all software Have back-ups available	TM
			Build in schedule reserves	
Covid outbreak delays schedule	Possible	Major	Identify and train back-up personnel	LR

Sample + Template



Budget Management

High budgets are correlated with a greater project failure rate:

Projects with a budget of **\$1 million or more** fail **50% more** often than projects where \$350,000 or less is spent.

WHY DO YOU THINK THIS IS?





Components of Budget Management

Estimating

Tracking

Controlling

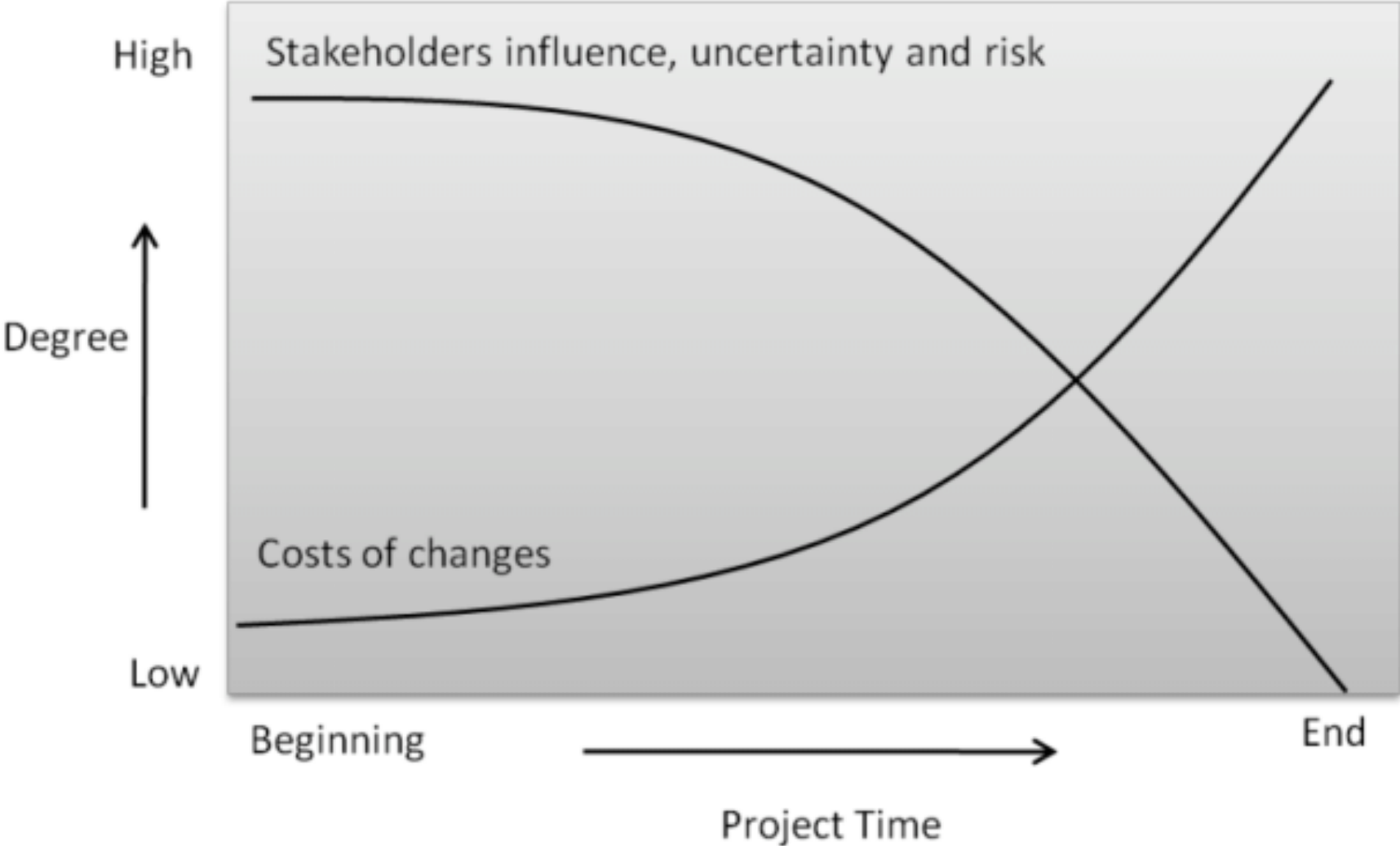
Reporting



Previous Course



Cost of Changes





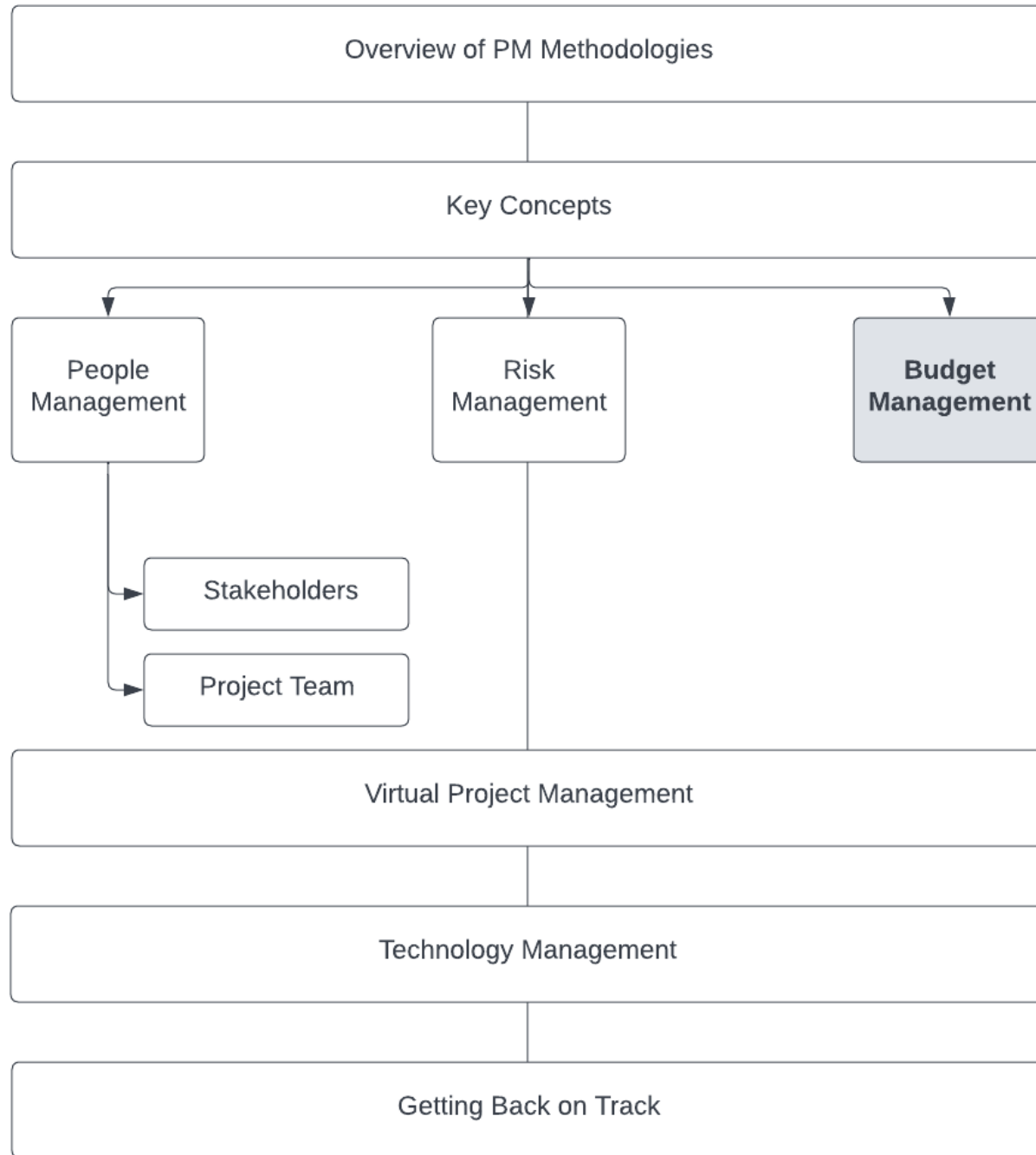
A big part of the job is to tell people what they need to hear, not necessarily what they want to hear.

They'll thank you for it later.



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Questions & Comments





Earned Value Analysis

A technique that helps you measure and monitor **work completed against your plan**. It can quickly tell you where you stand with both budget and schedule.





Earned Value Analysis

**Planned
Value
(PV)**

The authorized budget (*time or money*) assigned to the scheduled work



Earned Value Analysis

**Earned
Value
(EV)**

The planned value for all the work completed to a point in time without reference to actual cost

% complete * total budget



Earned Value Analysis

**Actual Cost
(AC)**

The true cost of all the
work completed to a point
in time



Earned Value Analysis

Cost Variance (CV)

The difference between
planned costs and actual
costs to date

$$EV - AC$$

Positive = Under budget

Negative = Over budget



Earned Value Analysis

Schedule Variance (SV)

The difference between
planned progress and actual
progress to date

$$EV - PV$$

Positive = Ahead of schedule

Negative = Behind schedule



Earned Value

You are 60% done with a project that has a budget of \$100,000

$$\mathbf{EV = \$60,000}$$





Cost Variance

$$CV = EV - AC$$

Project budget = \$100,000

You're 60% done

$$EV = \$60,000$$

Actual costs so far = \$70,000

$$CV = -\$10,000.$$

Negative number = **over budget**





Schedule Variance

$$SV = EV - PV$$

Project estimate is **4 months**

You are currently **2 months** in

Your project is only **25% complete**

$$EV = 25\% * 4 \text{ months} = 1$$

$$PV = 2 \text{ months}$$

$$SV = 1 - 2 = -1$$

Negative number = **behind schedule**





Deeper Analysis

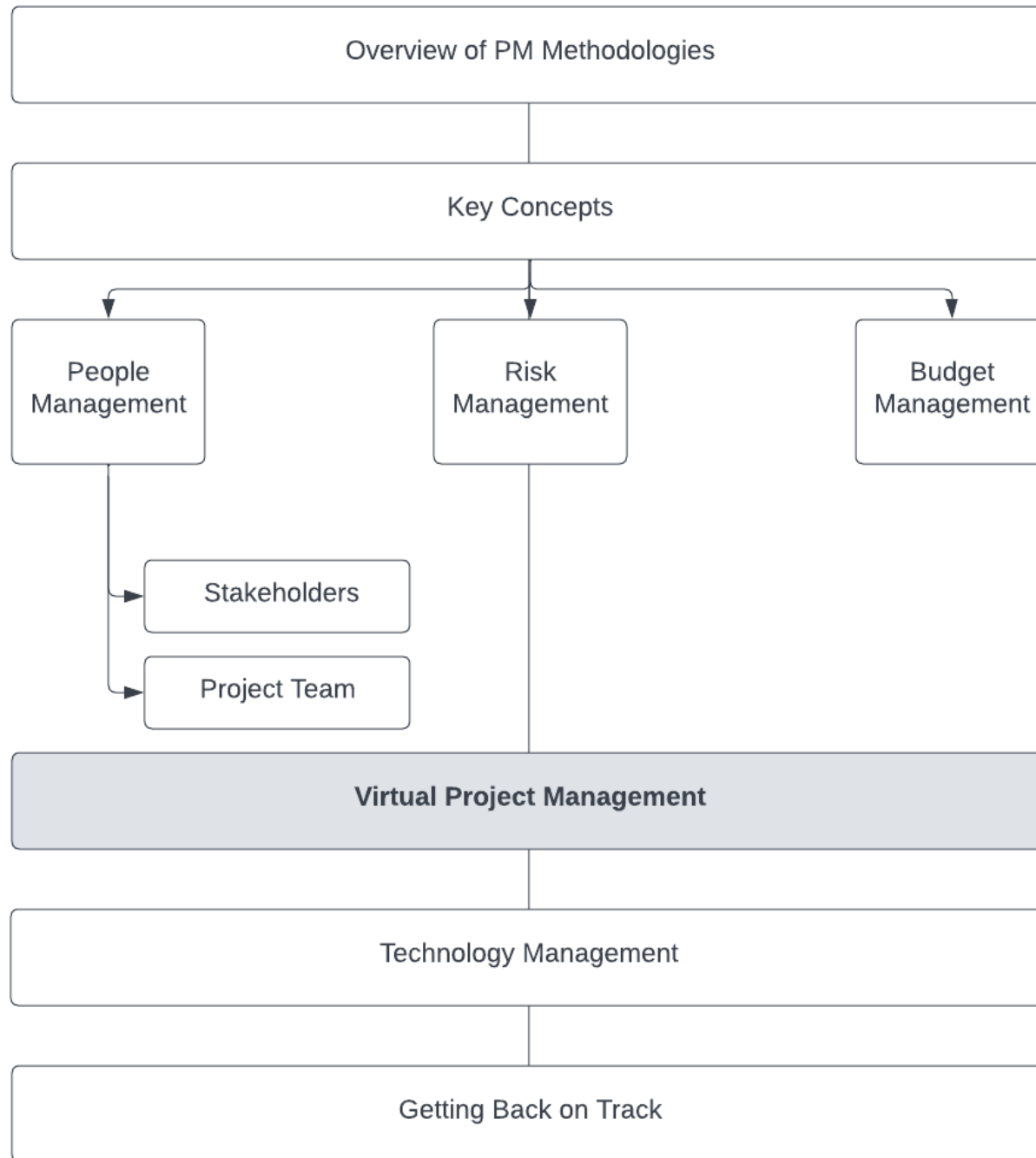
Earned Value Analysis Continued

Name	Description	Equation	Results
Budget at Completion BAC	The sum of all budgets established for the work performed		
Variance at Completion VAC	A project of the amount of budget surplus or deficit at the completion of the project	$BAC - EAC$	Positive = under planned cost Negative = over planned cost
Cost Performance Index CPI	A measure of cost efficiency	EV/AC	Exactly 1 = on plan More than 1 = under plan Less than 1 = over plan
Schedule Performance Index SPI	A measure of schedule efficiency	EV/PV	Exactly 1 = on schedule More than 1 = ahead of schedule Less than 1 = behind schedule
Estimate at Completion EAC	The expected total cost of completing all work	BAC/CPI	

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Questions & Comments

Program Overview





Virtual Project Management



IN-PERSON



REMOTE



HYBRID



Drawbacks

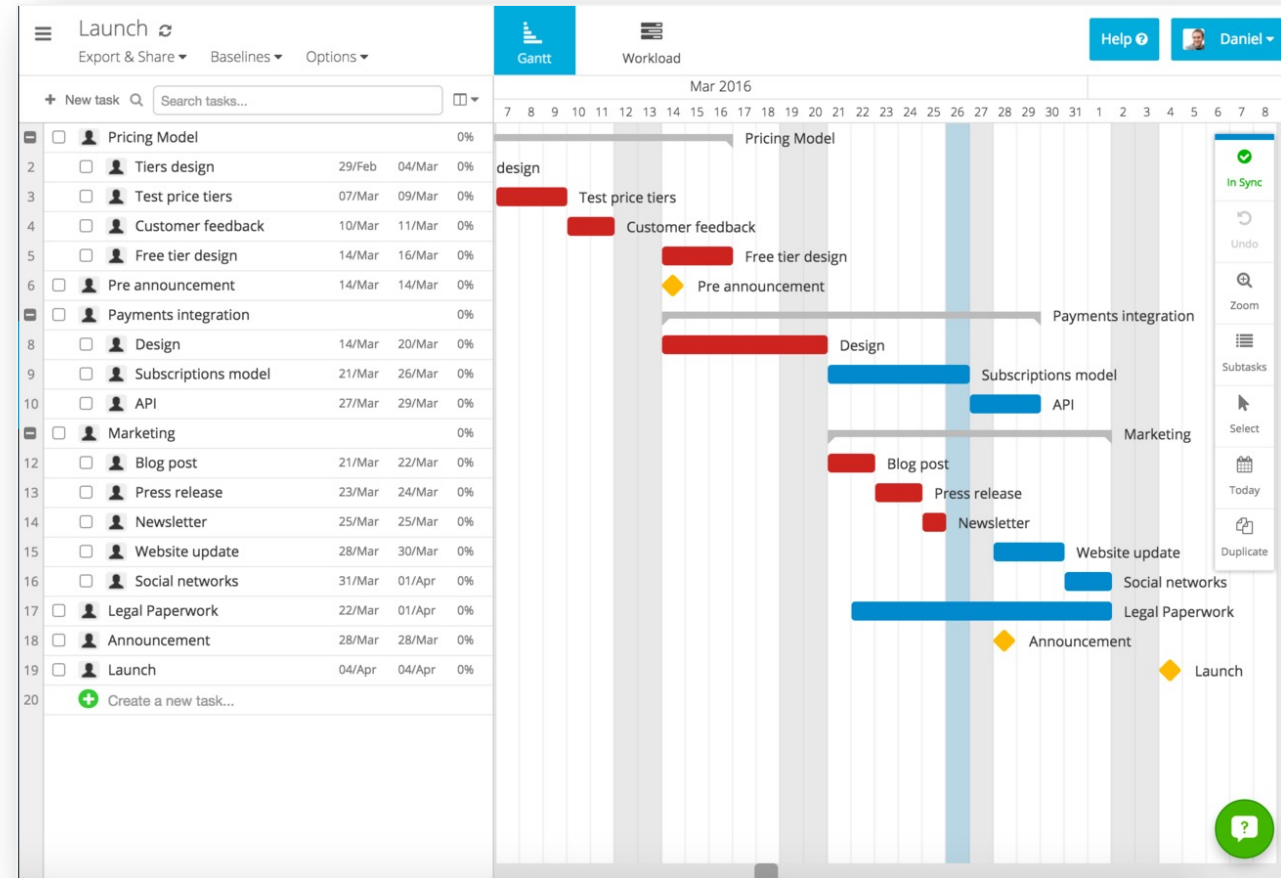


- Distributed time zones
- Slower communication
- Increased miscommunication
- Less visibility for monitoring progress
- Harder to build trust and rapport



Success Strategies

Use **collaborative technology** accessible to everyone on the team





PM Technology



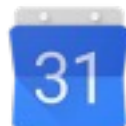


PM Technology



Shared files with protections as needed

Suite





Success Strategies

Communicate assignments
face-to-face and document
commitments





Success Strategies

Leverage real-time chat tools for quick, one-off questions, reminders, and follow up **AFTER** face-to-face communication



Microsoft Teams





Success Strategies

Schedule team meetings
respectfully

Try to avoid inconveniencing one
group or person consistently





Success Strategies

Provide **ample reminders** for due dates

Do not rely solely on email





Success Strategies





Success Strategies

Respond quickly to team questions and concerns

Do not be a bottleneck





Success Strategies

Schedule **regular meetings**
with project owners to
continuously manage
expectations

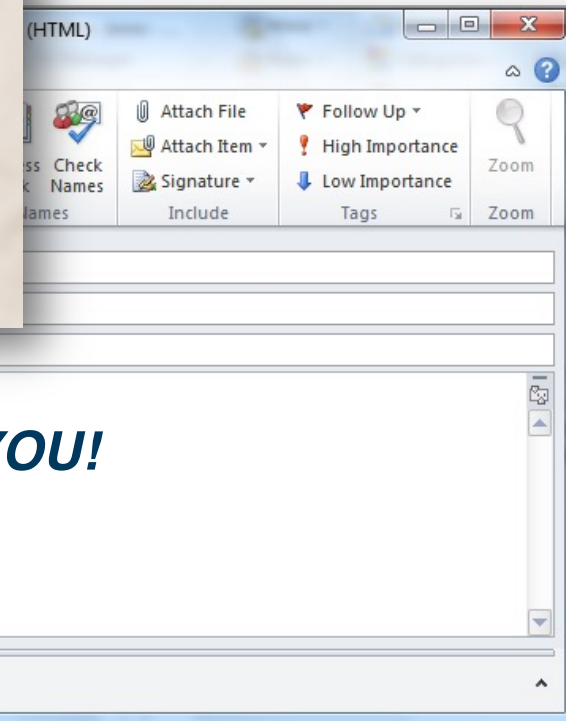
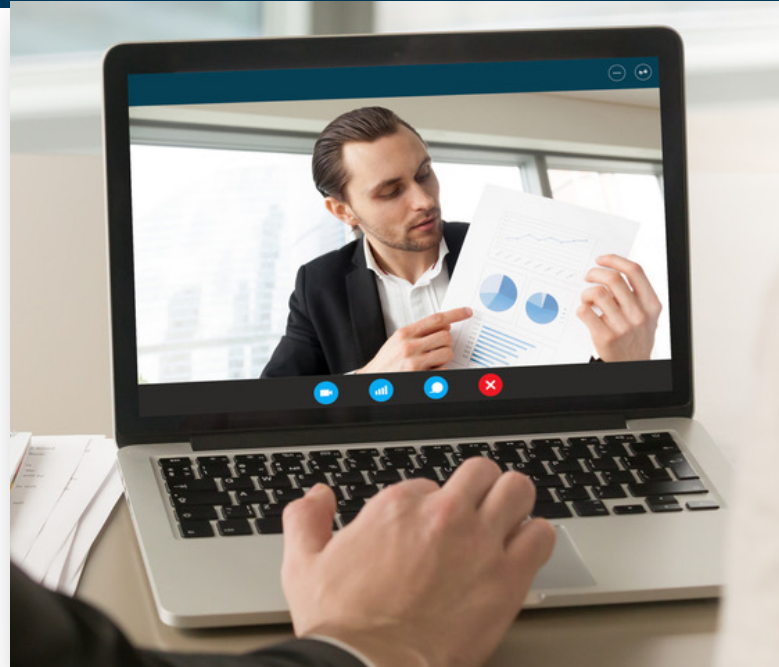
And/or provide regular email status reports





Success Strategies

Give **visibility** to team members
(and yourself) with public
acknowledgement of achievement



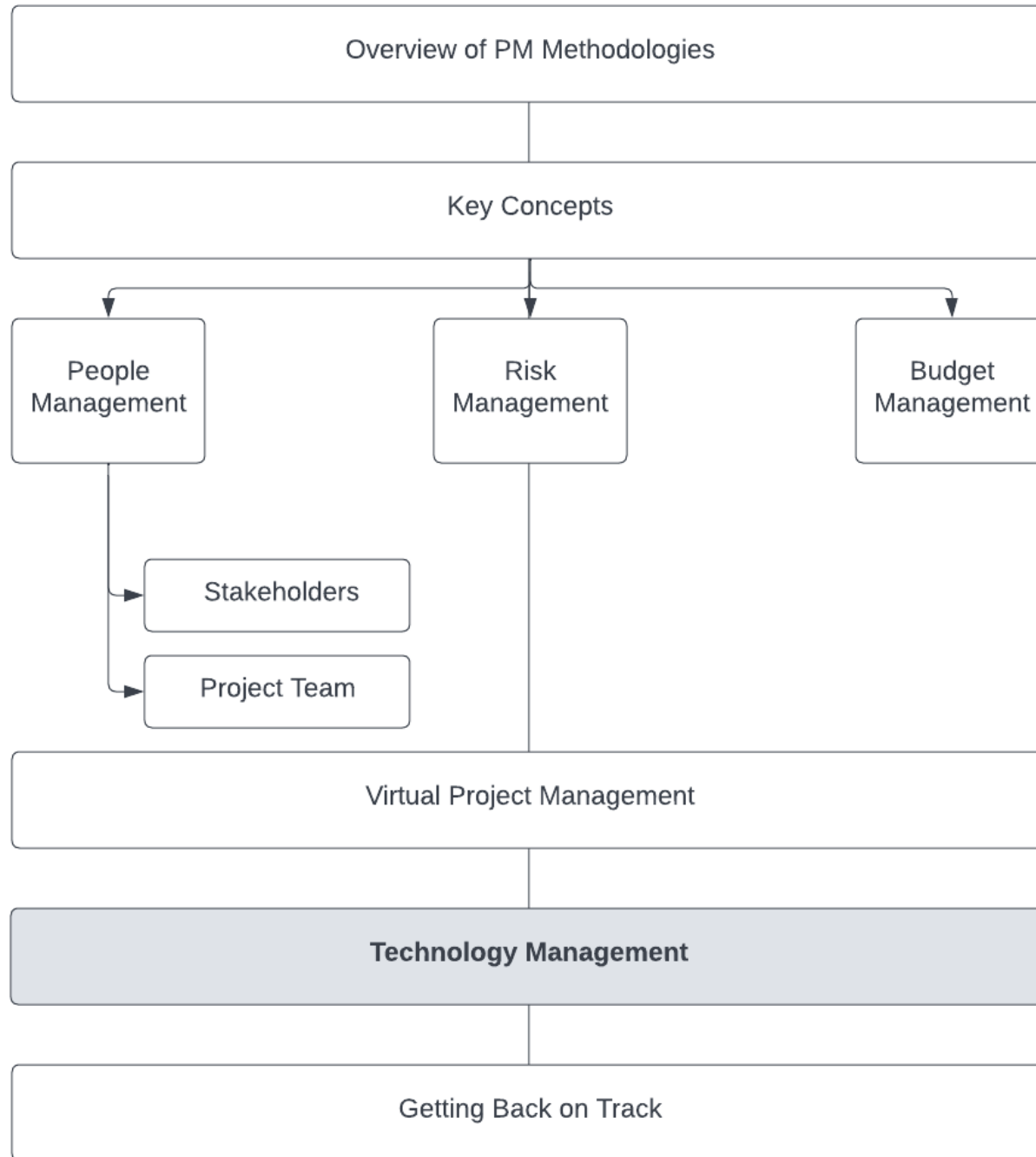


Success Strategies

Actively seek **results** once the project is complete



Program Overview





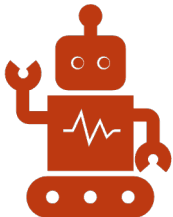


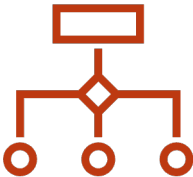

The Role of the PM

- Use **consistently** and keep **up-to-date**
- Create standardized **procedures**
- **Monitor, maintain,** and continuously **train**





Advanced Features

				
Automations	Integrations	Categorization	Workflows & Templates	Dashboards



Automations Example



Automate your PM technology to send reminders to responsible individuals at various intervals based on task due dates.



Integrations Example



Connect your PM technology to your calendar so you can see task due dates; Connect your PM tech to your inbox so you can attach email communication to specific projects/tasks.



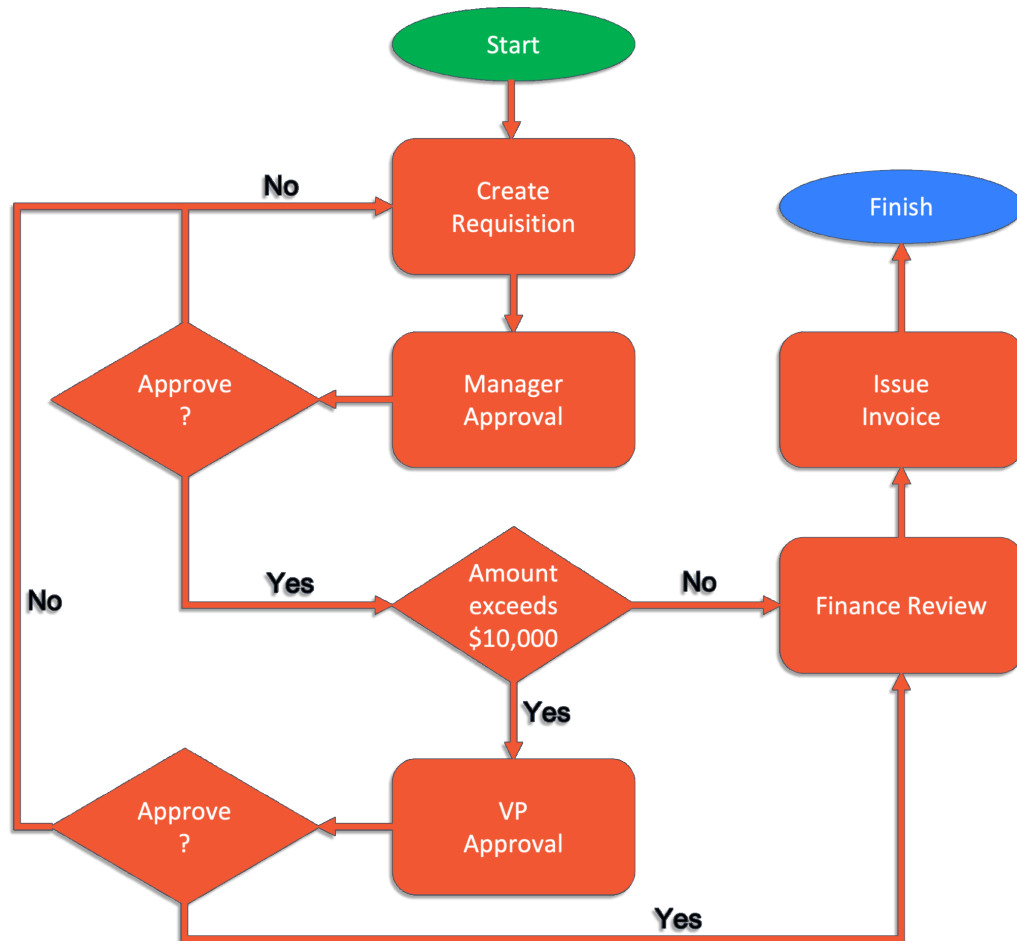
Categorization Example

Title	Start date	Stage	Assignees
Today			
<input checked="" type="checkbox"/> Campaign objectives	9 Nov	Done	
<input checked="" type="checkbox"/> Analyze competitors	9 Nov	Done	
<input type="checkbox"/> User research	9 Nov	In progress	
<input type="checkbox"/> Design Marketing brochure	9 Nov	Hold	
Tomorrow			
<input type="checkbox"/> Redesign Homepage	10 Nov	To-Do	
<input type="checkbox"/> Send invite emails	10 Nov	To-Do	
<input type="checkbox"/> Start campaign	10 Nov	To-Do	
<input type="checkbox"/> Analyze progress	10 Nov	To-Do	

Categorize research tasks with the same tag; Categorize tech projects into one group, etc.



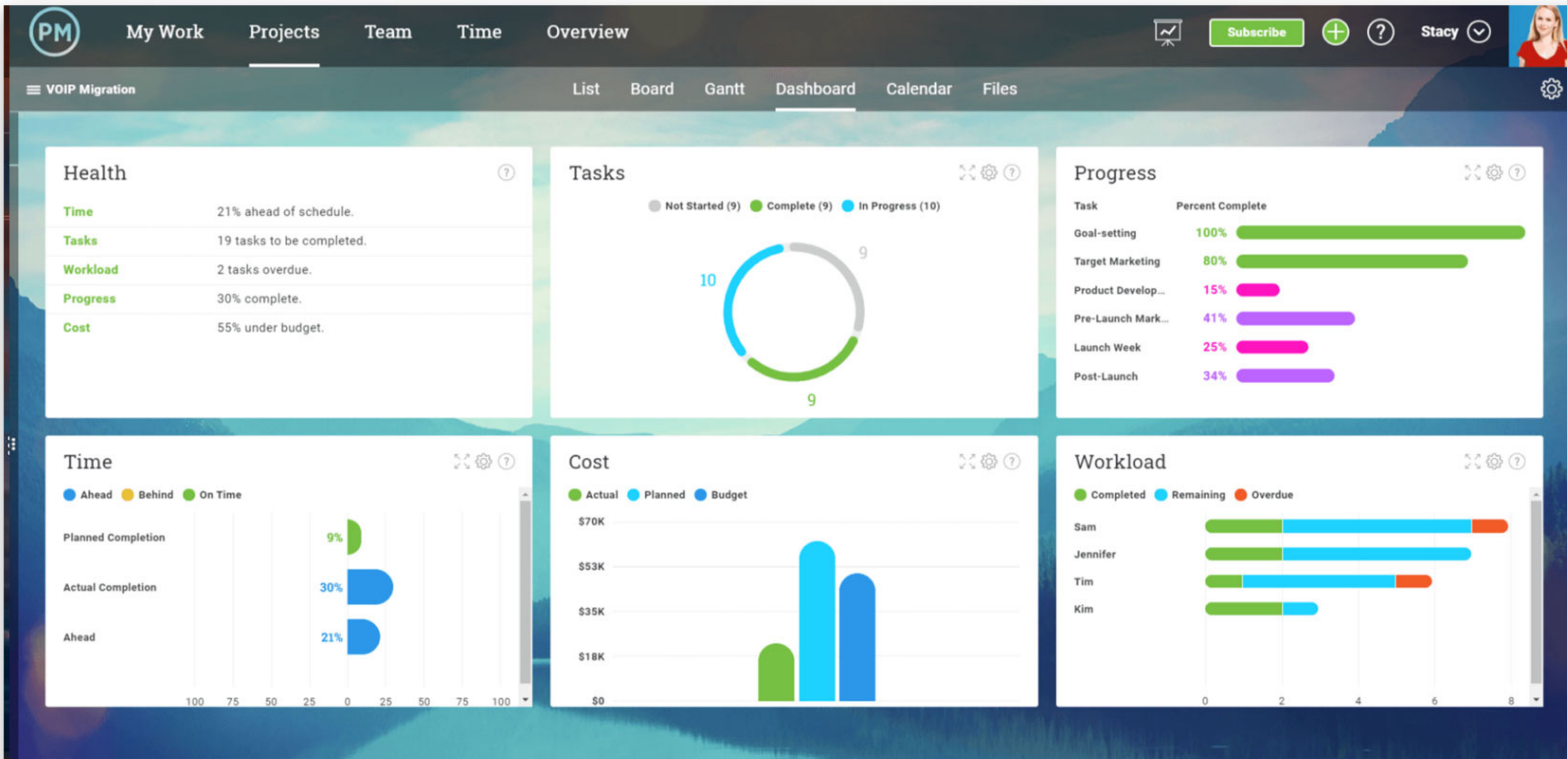
Workflows & Templates Example



Create a template for meeting planning projects which include all the steps/tasks involved.



Dashboards Example



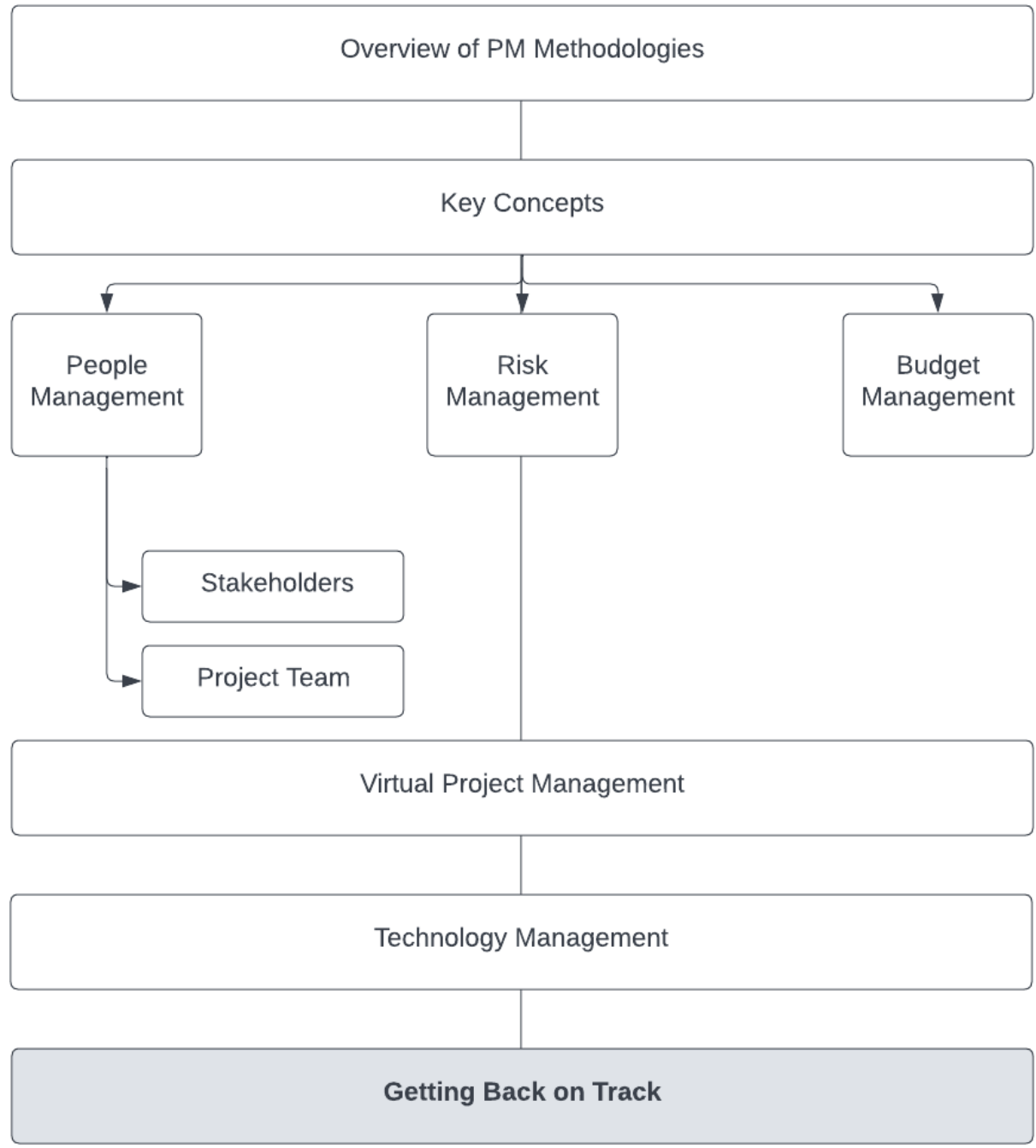
Create a single page that shows open tasks, tasks completed, hours used on the project so far, tasks assigned to various team members, etc.

The image features five dark silhouettes of people in professional attire standing against a background of radiating orange and yellow lines, resembling a sunburst. From left to right: a woman in a dress, a man in a suit, a woman in a dress with hands on hips, a woman in a dress, and a man in a suit. At the bottom, a white rectangular box with a thin blue border contains the text 'Become a Super User' in a bold, dark blue font.

Become a Super User

The background of the slide is a repeating pattern of large, bold, black question marks and exclamation points scattered across a white background. A solid orange horizontal band is positioned across the middle of the image, containing the text "Questions & Comments" in white. The text is centered within the orange band and is the primary focus of the slide.

Questions & Comments







Prevention

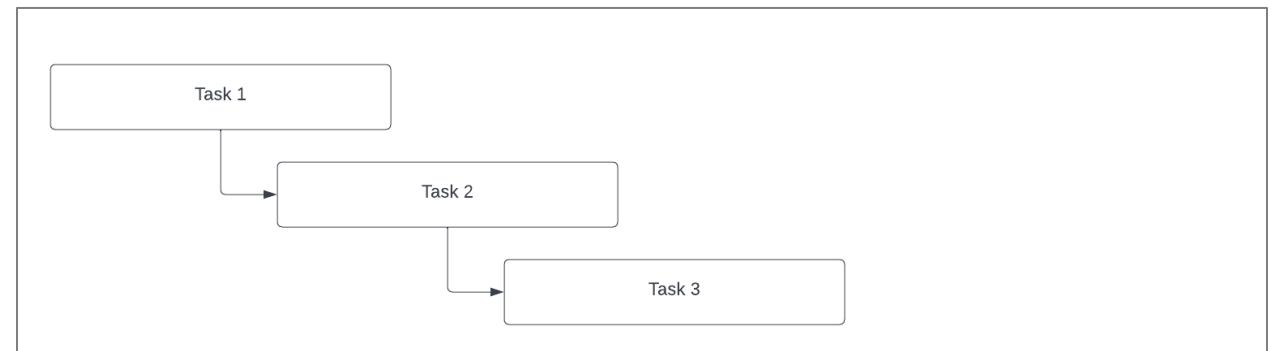
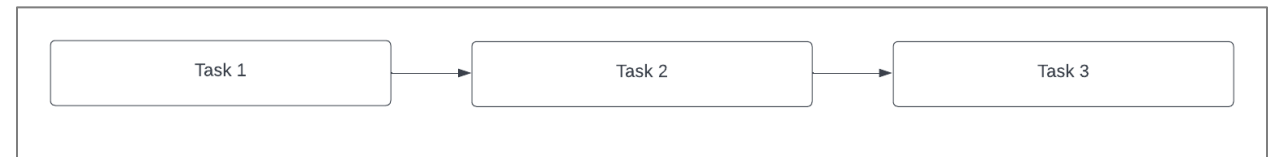




Fast Tracking

Schedule compression technique where activities that would normally be done **in a sequence** are done **in parallel** for at least a portion of the project

- No impact to budget
- Increase in risk
- 33% complete rule

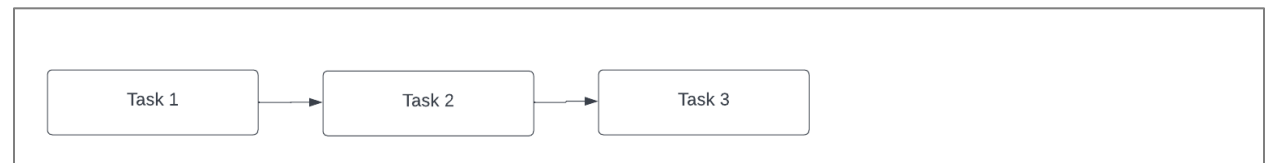
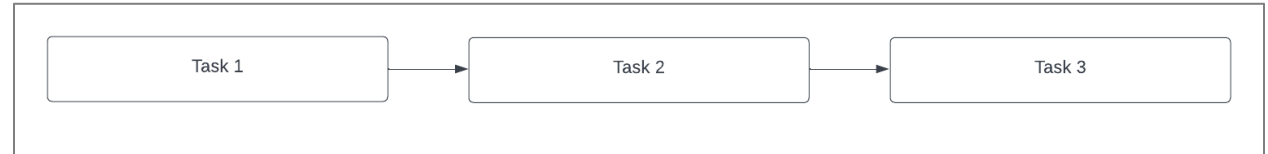




Crashing

Schedule compression technique where **resources are added** to shorten the duration of activities.

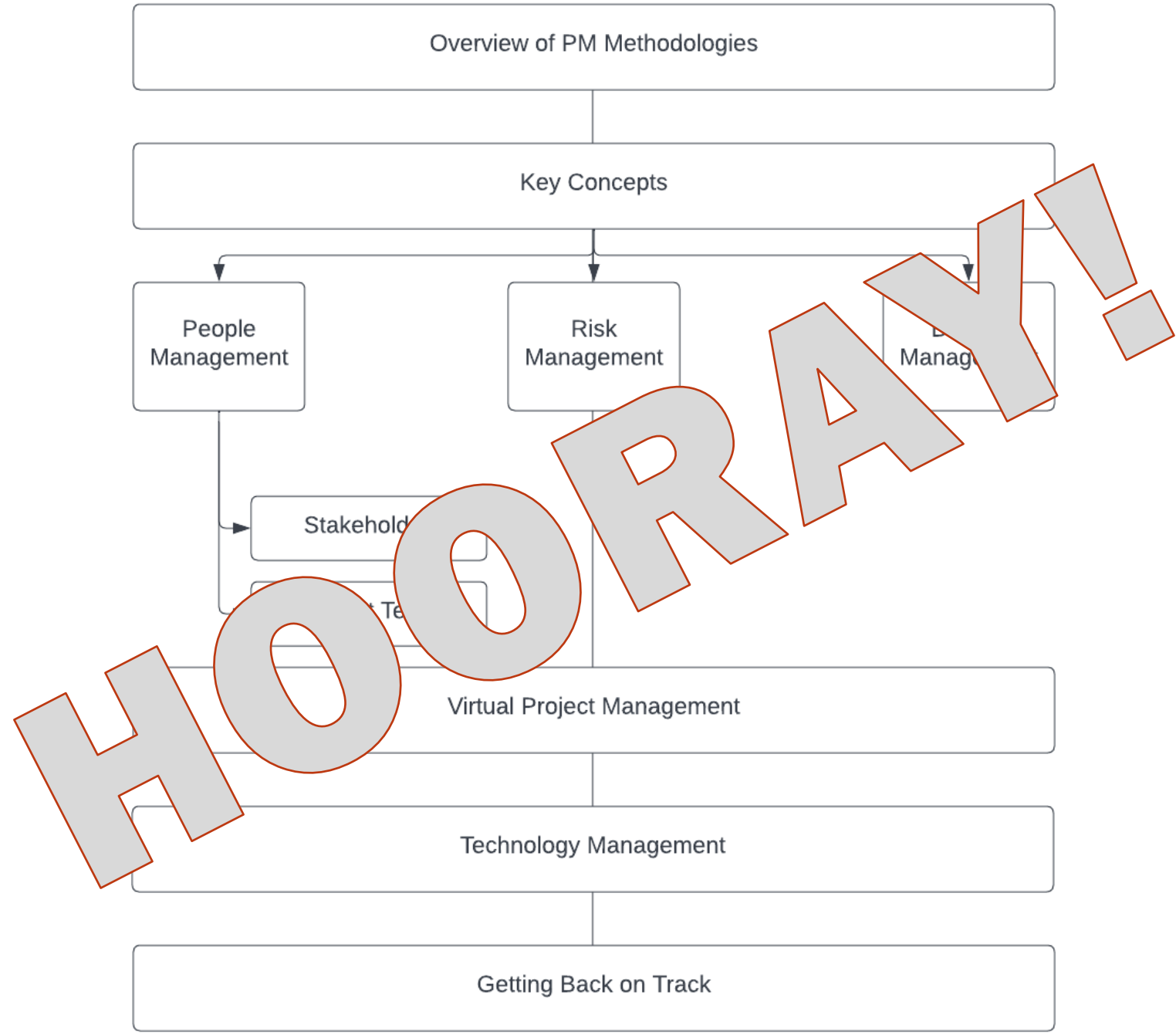
- Least additional cost activities
- Greater reduction at front-end
- Cost may increase



The background of the slide is a repeating pattern of large, bold, black question marks and exclamation points scattered across a white background. A solid orange horizontal bar is positioned across the middle of the slide, containing the text "Questions & Comments" in white.

Questions & Comments

Program Overview





What's Next?



- **Celebrate** a successful Learning Lab!
- **Get involved** in more advanced project work
- Continue to **learn from others**
- Consider continuing your **formal training**
- Put these strategies into **practice**



What's Next?

Future Learning Labs

Alumni Discount Code

Will be available in the course area, along with all post-event materials and replays by TUESDAY of next week

2023 Labs Available Now!

- Task & Time Management
- Change Management
- Problem Solving & Decision Making
- Process Improvement

SURVEY

Select one

Excellent

Good

Average

Poor

Very poor

Please Complete the Survey!