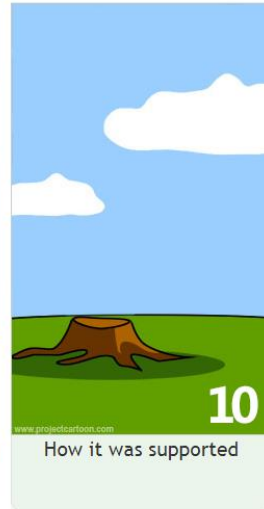
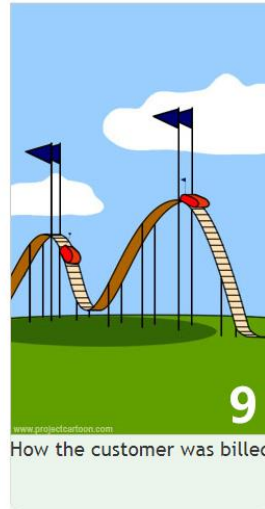
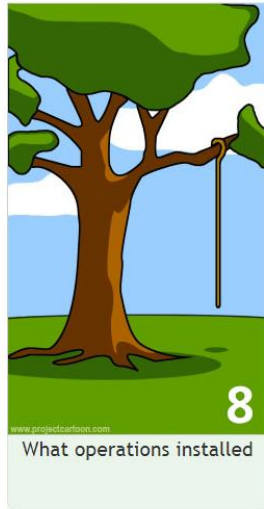
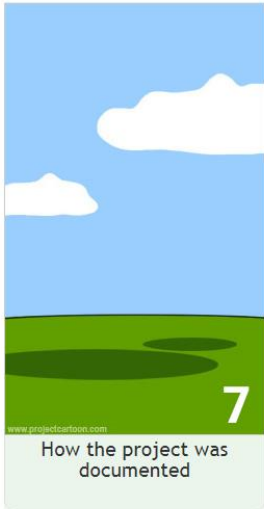
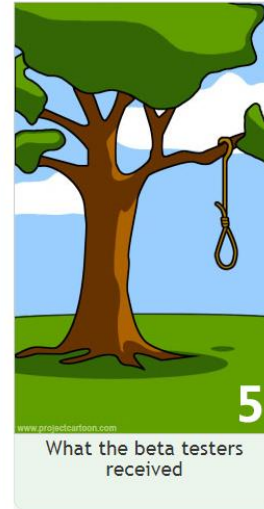


# Importance of Project Management



# Project Planning



# Importance of Project Management

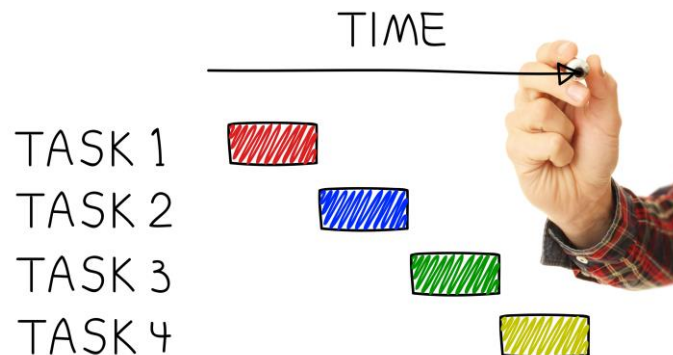
Project management is a process designed to guide the control and execution of a project. It's the key to a successful project and is the most important thing that needs to be considered when starting any business project.

# Importance of Project Management

- Sets expectations on what needs to be delivered
- Helps you define what activities need to be performed to get to your goals
- Helps you to identify and efficiently allocate resources
- Helps you to more effectively manage costs of a project
- Helps to you respond to any encountered changes more effectively
- Helps to you share progress updates with your team and clients

# What is Project Management/Planning?

- A method for organizing tasks
- A structured framework to help a group work productively
- Tools to aid in task sequencing, dependency analysis, resource allocation, scheduling, etc.
- Tools to track progress, costs, and the timeline relative to plan



# Why Do You Need Project Management?

- Projects can be complex and typically need coordination of:
  - Multiple resources
  - Multiple tasks – some must precede others
  - Multiple decision points – approvals
  - Phased expenditure of funds
  - Matching of people/resources to tasks
  - Have critical timelines for completion

# Why Do You Need Project Management?

- Better control of financial, physical, and human resources
- Improved customer relations
- Shorter project delivery times
- Lower costs
- Higher quality and increased reliability
- Improved productivity
- Better internal coordination
- Higher worker morale (less stress)

# An Old Adage:

*Fail to Plan . . .  
and You Plan to Fail!*



# Stage One: Project Overview

- High-level summary of the project
- Sets the overall scope
- Clearly written to communicate
- Team leader responsibility
- Critical to get this right!



# What's In a Project Overview?

- Statement of Problem (or Opportunity)
- Goals and Objectives
- Measures of Success
- Approach, Process, and Timing
- Assumptions and Risks

# Goals and Objectives

Goals and objectives describe what we want to achieve to solve the problem or take advantage of the opportunity

- Keep them simple
- Focus on the important items
- Collectively, they define the scope
- They must be measurable for success
- Clearly written



# Goals and Objectives - *Use the SMART Test*

**S** – Specific

**M** – Measurable

**A** – Attainable

**R** – Relevant

**T** – Time-Based

# Measures of Success

- Our desired results that can be quantified
  - Numbers, frequency, degrees of change
- Avoid intangible measures
  - Make it “better”
- Superlatives can be hard to achieve!
  - Avoid use of “all” or “never”



# Approach, Process, & Timing

- Describe how we will go about our work – what will we do?
- Define the schedule you will follow
- Consider how success was achieved in similar projects
- For a new project – be creative!

# Assumptions and Risks

- We need to consider the things we expect to happen, and the “what ifs”
- Assumptions
  - Things we believe will happen
  - Things needed to be true for success
- Risks
  - Undermine success
  - Actions can be planned to offset risks



# Assumptions and Risks

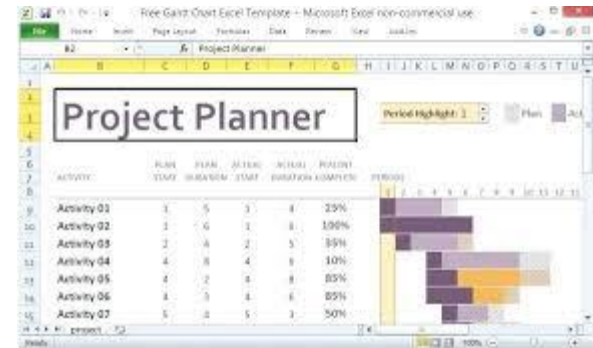
Might Include:

- Resources needed
- Timing of resources
- Events outside our control
- Potential delays and their effect

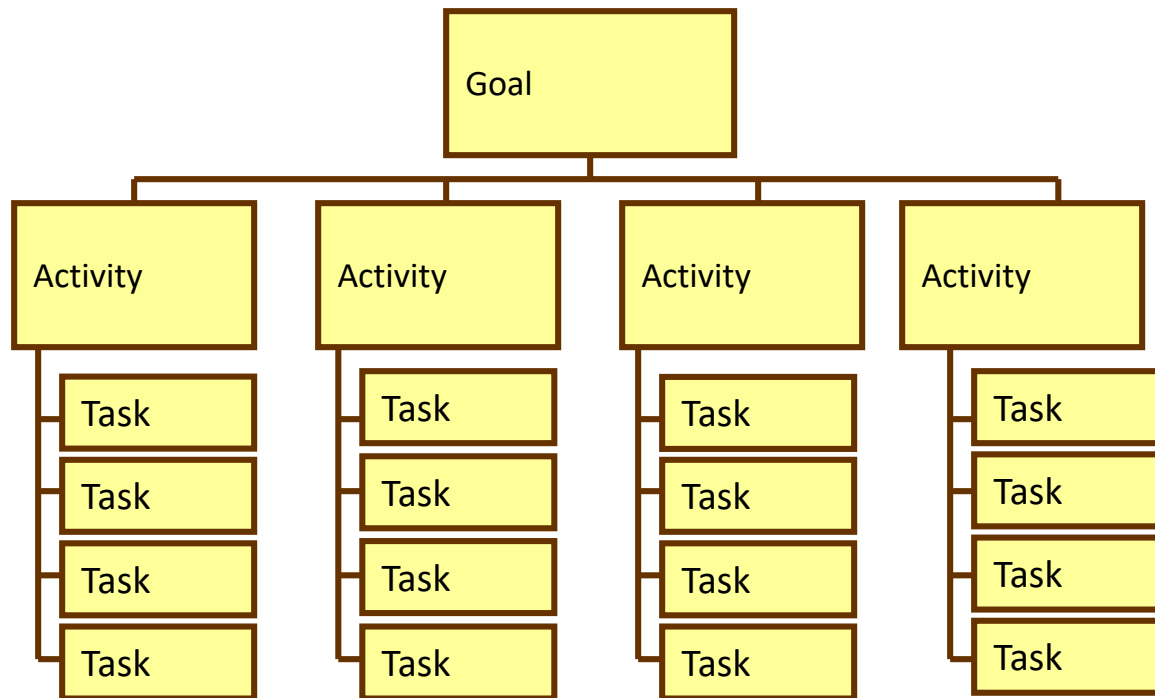


# Stage Two: Activity Plan

- Define the activities and tasks needed to achieve our goals
- Organize & prioritize activities and tasks
- Identify which tasks depend on others
- Assign team members to activities
- Define dates to begin and finish



# Activity Plan



# Project Activities and Tasks Should

- Pass the “SMART” test
- Have clear start and stop times
- Include estimated time and cost to complete
- Be assignable and manageable



- We must challenge assumptions

***“If you keep on doing what you’ve always done . . .  
. . . You will keep on getting what you’ve always got.”***

- We must think outside the box

# Stage 3: Assign Activities

## *Team Leader Should -*

- Confirm availability of resources
- Understand team member skills
- Match skills to tasks
- Establish progress milestones and reporting procedures

Activity Description	Roles					
	Sponsor	Project Authority	Project Manager	Team Member 1	Team Member 2	Team Member 3
1	A	I	I	R	I	R
2	I	A	R	I	R	I
3		C	A	I	R	I
4	A	I	I	R	I	R

R: Responsible, A: Accountable, C: Consulted, I: Informed

# Assign Activities

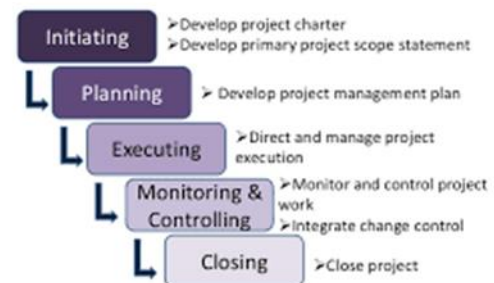
## *Team Members Should -*

- Know project's purpose
- Understand their assignments
- Know the availability of resources
- Be clear about deadlines
- Understand how to address issues

# Stage Four: Putting the Plan Into Action

- Now is the time to let the team do its job!
- Staying to the plan is the clearest path to success!
- A well-laid plan will help ensure a team is performin' . . . not stormin'!

## Project integration management



# Work the Plan

## *The Leader Should -*

- Get the project going
- Provide leadership to the team
- Assist with decisions & problems
- Obtain additional resources
- Monitor progress of activities
- Monitor team performance



# Stage Five: Closing Out the Project

- Recognize team members
- Prepare After-action report
  - Goals and objectives met?
  - Completed on schedule?
  - Lessons learned?
  - Ideas/recommendations for future projects



# Summary

## 5 Stages in Project Planning

1. Develop a Project Overview
2. Plan the Work
3. Make Activity Assignments
4. Put the Plan into Action
5. Prepare Project Closeout

## A Different Adage:

*If you plan the work . . .  
. . . you plan for success!*