PROJECT MANAGEMENT AND ACTION PLANNING ESSENTIALS: A ROADMAP AND TOOLS TO GET YOUR PROJECT MOVING.

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OBJECTIVES

Part A

Define Project Management and associated principles

Review PMBOK Process and Knowledge Areas Framework

Distinguish Project Management Tools

Analyze IBM Project Management Case

Part B

Define Action Planning

Compare and Contrast Project Management and Action Planning

Examine levels of organizational structure

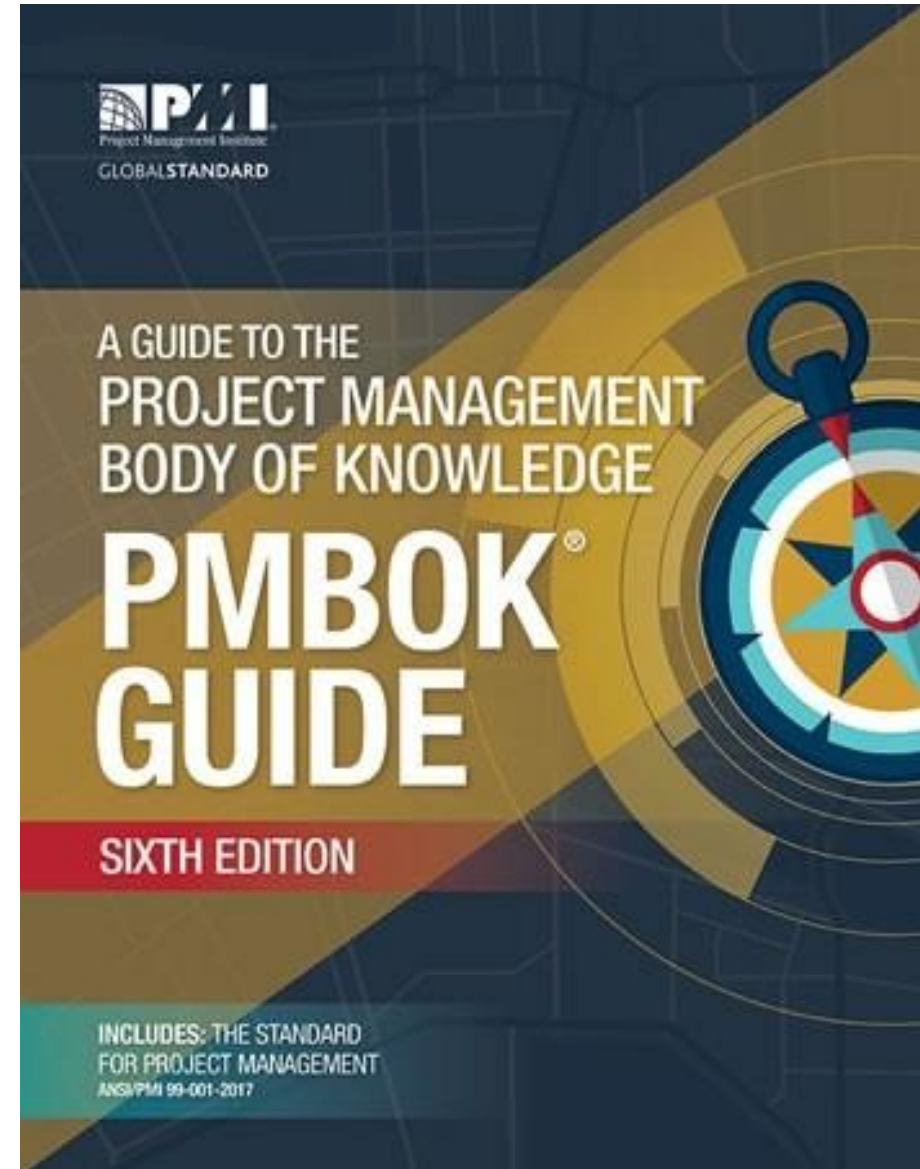Formulate new approaches to current academy projects

PART A

PMBOK GUIDE

Institutionalized through PMI Institute

PMBOK provides unifying framework and nomenclature

PMP Certification

BASICS

What is a Project?

- A Project is a temporary endeavor undertaken to create a unique product, service, or result

What is a Program?

- A group of related projects, subsidiary programs, and program activities managed in a coordinated way to obtain benefits not available from managing them individually.

What is Project Management?

- Project Management is the application of knowledge, skills, tools and techniques to project activities to meet project requirements

What is Project Acumen?

- Project Acumen is the ability to leverage project management experience, insights, models, and judgement toward optimally meeting project and stakeholder requirements.

12 Project Management Principles

Success Principle
You have to be willing and able to commit fully to the success of your project, or there's no point in even trying.

Project Manager Principle
You need to have a leader for the project to plan, execute and report to the sponsors and team.

Commitment Principle
Everyone, from the top executive down to the junior team member, must be on board with giving it their all.

Structure Principle
The structure of a project comes from balancing its goals, schedule and resources.

Definition Principle
In order for a project to operate, its phases need to be clearly defined from the sponsor on down.

Transparency Principle
A project's success is based on how well you can communicate the right information to the right person.

Communication Principle
Being transparent isn't enough. You need a single line of communication to avoid confusion.

Progress Principle
Progress rests on procedure, so you have to have well-defined roles and project policies in place.

Life-Cycle Principle
All projects are broken up into smaller phases, from initiation to close, and they are marked by milestones.

Culture Principle
It's important that the culture of your team meshes with your project to ensure the greatest productivity.

Risk Principle
All projects are risky, and not all risks can be planned for; so plan, but always be aware and prepared to act.

Accountability Principle
Have metrics in place to chart your project's progress and reward those who help you achieve this goal.

PROJECTMANAGER

www.projectmanager.com

PMBOK GUIDE KNOWLEDGE AREA-PROCESS GROUP FRAMEWORK

Two-dimensional framework: process groups and knowledge areas
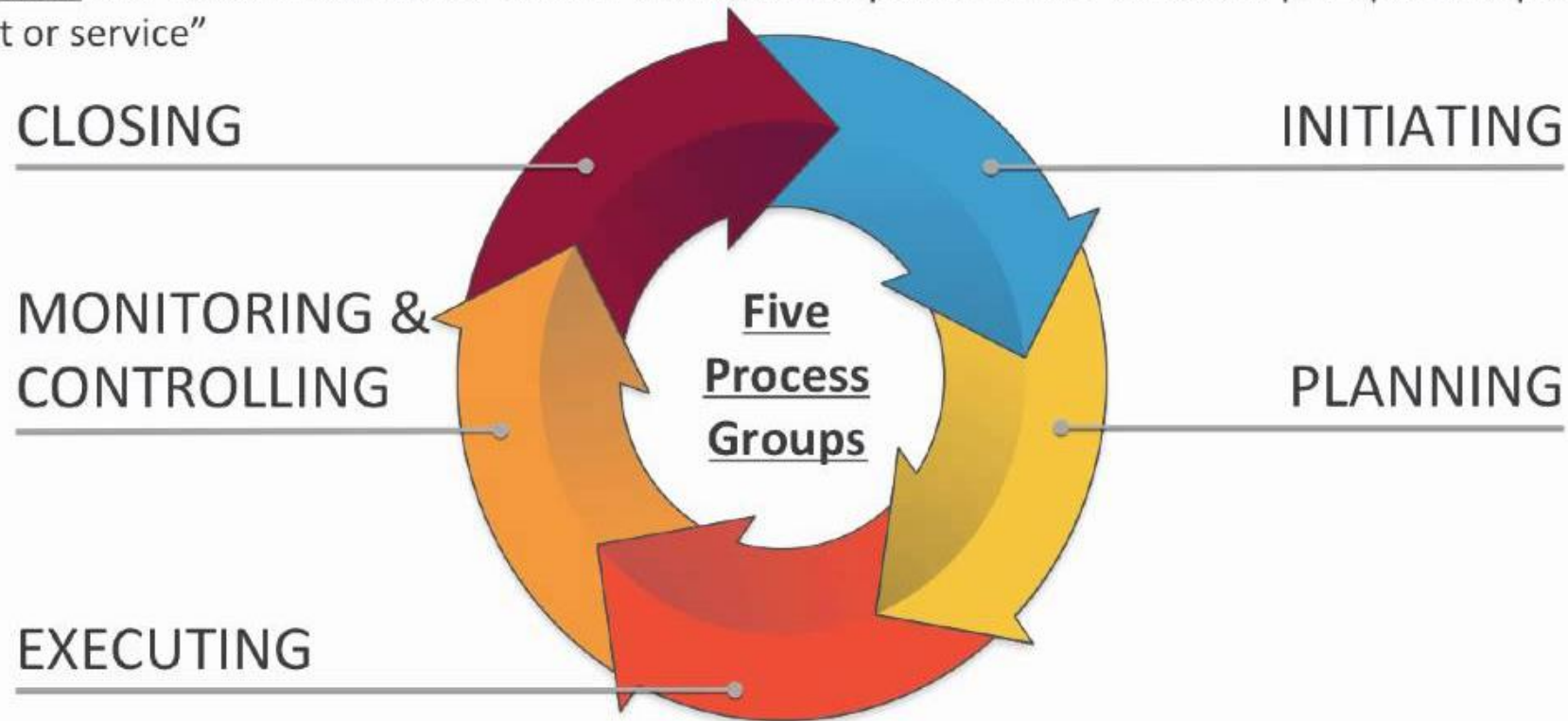
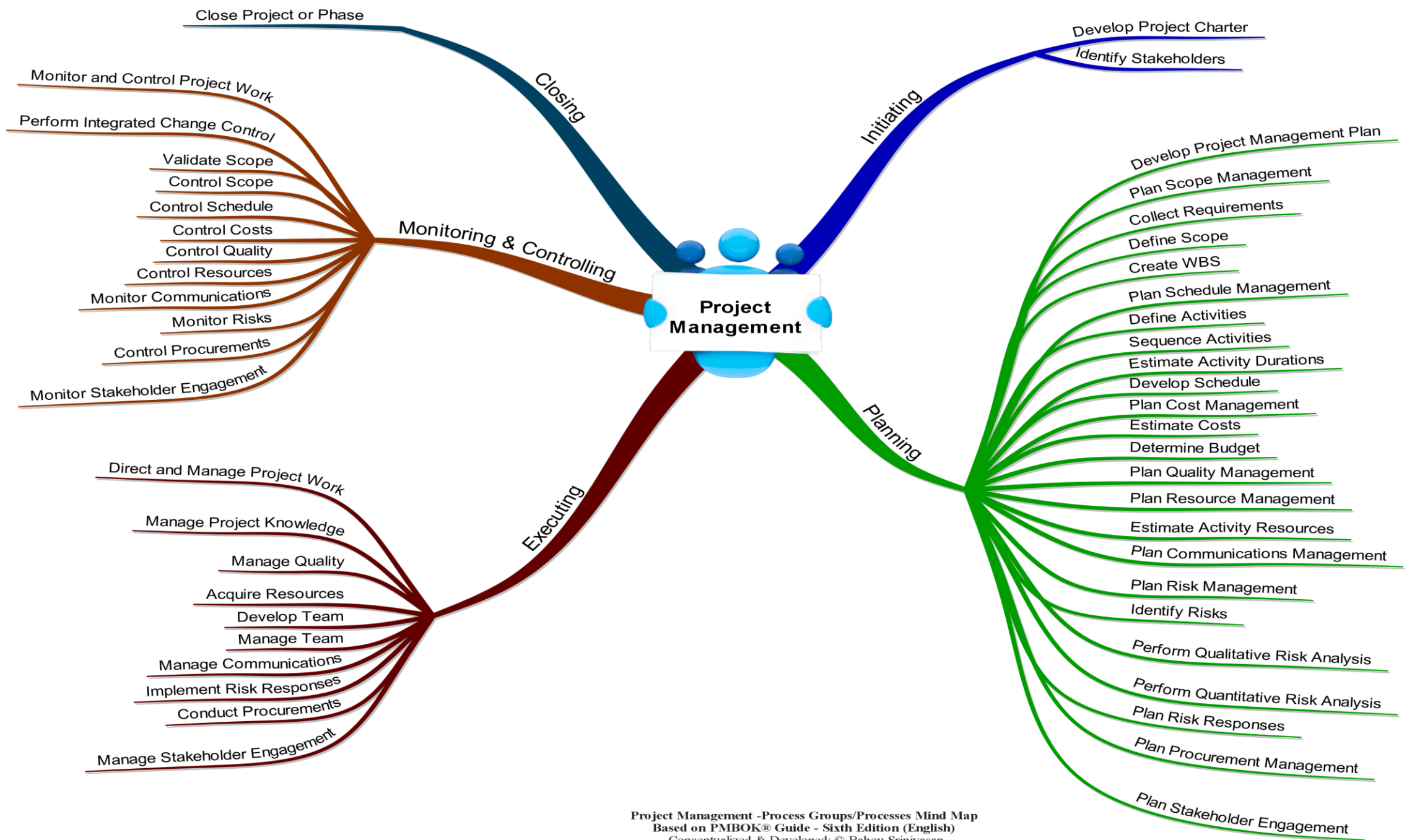Ten Knowledge Areas

Five Process Groups

47 processes, each of which belong to a unique knowledge area and process group

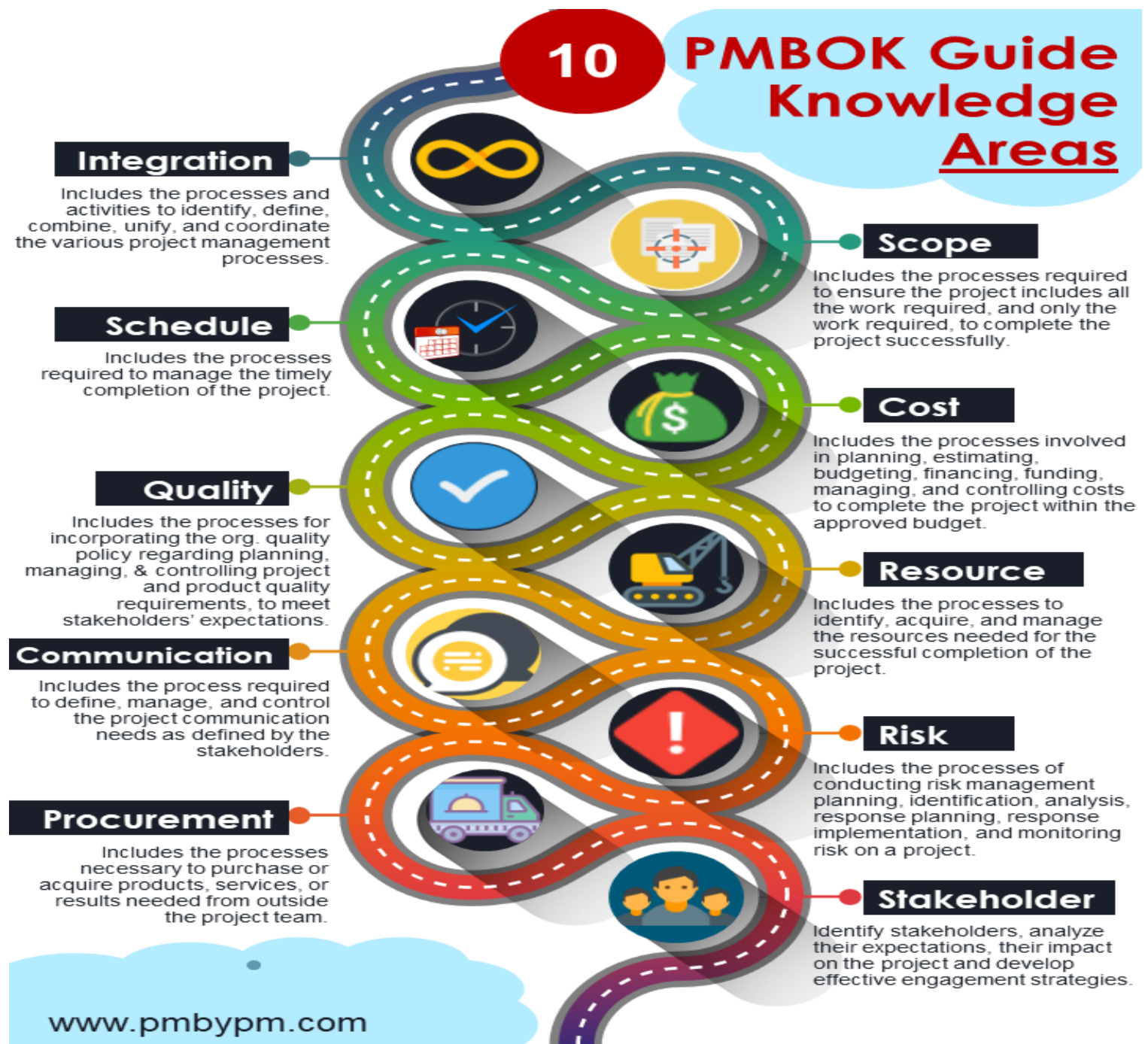Framework is NOT blindly applicable – it needs customization!

THE FIVE PROCESS GROUPS

A Process is a "set of interrelated actions and activities performed to achieve a pre-specified product, result or service"

Project Management -Process Groups/Processes Mind Map
Based on PMBOK® Guide - Sixth Edition (English)
Conceptualized & Developed: © Babou Srinivasan

Project Management

Closing
- Close Project or Phase

Initiating
- Develop Project Charter
- Identify Stakeholders

Monitoring & Controlling
- Monitor and Control Project Work
- Perform Integrated Change Control
- Validate Scope
- Control Scope
- Control Schedule
- Control Costs
- Control Quality
- Control Resources
- Monitor Communications
- Monitor Risks
- Control Procurements
- Monitor Stakeholder Engagement

Planning
- Develop Project Management Plan
- Plan Scope Management
- Collect Requirements
- Define Scope
- Create WBS
- Plan Schedule Management
- Define Activities
- Sequence Activities
- Estimate Activity Durations
- Develop Schedule
- Plan Cost Management
- Estimate Costs
- Determine Budget
- Plan Quality Management
- Plan Resource Management
- Estimate Activity Resources
- Plan Communications Management
- Plan Risk Management
- Identify Risks
- Perform Qualitative Risk Analysis
- Perform Quantitative Risk Analysis
- Plan Risk Responses
- Plan Procurement Management
- Plan Stakeholder Engagement

Executing
- Direct and Manage Project Work
- Manage Project Knowledge
- Manage Quality
- Acquire Resources
- Develop Team
- Manage Team
- Manage Communications
- Implement Risk Responses
- Conduct Procurements
- Manage Stakeholder Engagement

THE TEN KNOWLEDGE AREAS

10 PMBOK Guide Knowledge Areas

Integration
Includes the processes and activities to identify, define, combine, unify, and coordinate the various project management processes.

Scope
Includes the processes required to ensure the project includes all the work required, and only the work required, to complete the project successfully.

Schedule
Includes the processes required to manage the timely completion of the project.

Cost
Includes the processes involved in planning, estimating, budgeting, financing, funding, managing, and controlling costs to complete the project within the approved budget.

Quality
Includes the processes for incorporating the org. quality policy regarding planning, managing, & controlling project and product quality requirements, to meet stakeholders' expectations.

Resource
Includes the processes to identify, acquire, and manage the resources needed for the successful completion of the project.

Communication
Includes the process required to define, manage, and control the project communication needs as defined by the stakeholders.

Risk
Includes the processes of conducting risk management planning, identification, analysis, response planning, response implementation, and monitoring risk on a project.

Procurement
Includes the processes necessary to purchase or acquire products, services, or results needed from outside the project team.

Stakeholder
Identify stakeholders, analyze their expectations, their impact on the project and develop effective engagement strategies.

www.pmbypm.com

Project Management - Knowledge Area Processes Mind Map
Based on PMBOK® Guide - Sixth Edition (English)
Conceptualized & Developed: © Babou Srinivasan

Process Groups

| Knowledge Areas	Initiating	Planning	Executing	Monitoring &	Closing	K
Integration	Develop Project Charter	Develop Project Management Plan	Direct and Manage Project Work	Monitor and Control Project Work Perform Integrated Change Control	Close Project or Phase	
Scope		Plan Scope Management Collect Requirements Define Scope Create WBS		Validate Scope Control Scope		
Time		Plan Schedule Define Activities Sequence Activities Estimate Activity Resources Estimate Activity Durations Develop Schedule		Control Schedule		
Cost		Plan Cost Management Estimate Costs Determine Budget		Control Costs		
Quality		Plan Quality Management	Perform Quality Assurance	Control Quality		
Human Resources		Plan Human Resource Management	Acquire Project Team Develop Project Team Manage Project Team			
Communications		Plan Communications Management	Manage Communications	Control Communications		
Risk		Plan Risk Management Identify Risks Perform Qualitative Risk Analysis Perform Quantitative Risk Analysis Plan Risk Responses		Control Risks		
Procurement		Plan Procurement Management	Conduct Procurements	Control Procurements	Close Procurements	
Stakeholder	Identify Stakeholders	Plan Stakeholder Management	Manage Stakeholder Engagement	Control Stakeholder Engagement		

APPENDIX I — PROJECT CHARTER

Project Charter			
Project Name			
Project Description			
Project Manager		**Date Approved**	
Project Sponsor		**Signature**	
Business Case		**Expected Goals/Deliverables**	
Team Members			
Name	**Role**		
Risks and Constraints		**Milestones**	

APPENDIX II — GANTT CHART
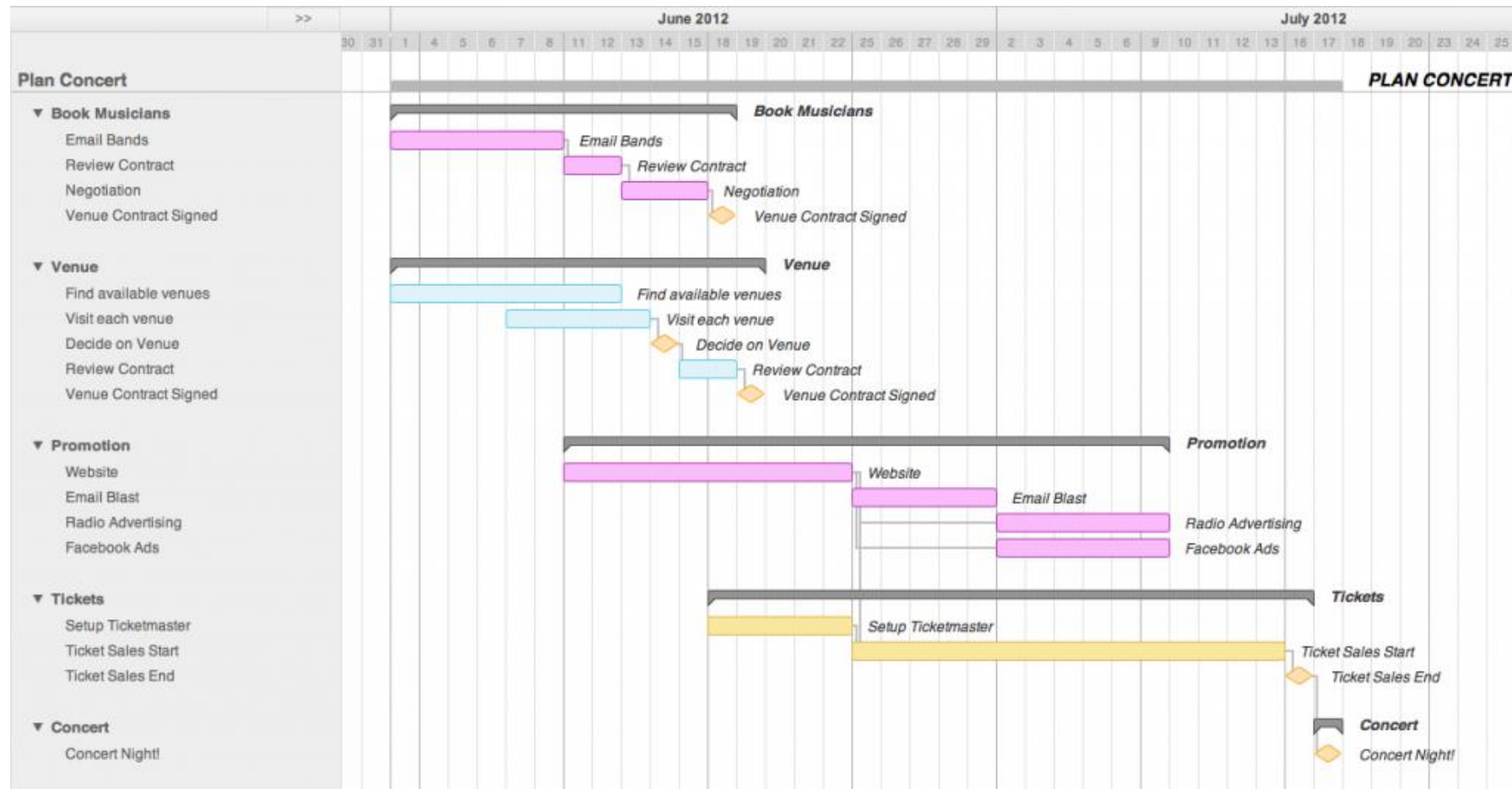
APPENDIX III — FISHBONE DIAGRAM

Root Cause Analysis (RCA)
Ishikawa / Fishbone
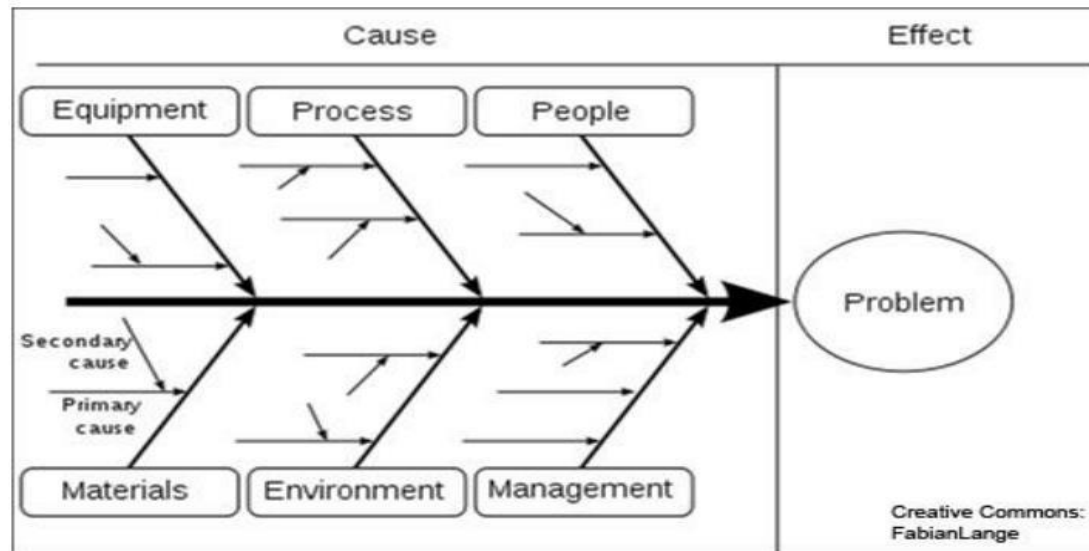
APPENDIX IV – RACI CHART

RACI Chart

Activity	Project Sponsor	Project Manager	Project Team	Department Manager
Prepare Bill of Materials		A	R	C
Prepare Estimate	I	A	R	I
Authorize Expenditure	R	I	I	I
Send Procurement Documents		R	C	
Evaluate Bids	A	R	C	
Perform Inspections	I	A	R	

R = Responsible   A = Accountable   C = Consult   I = Inform

APPENDIX V — KPI DASHBOARD

Quality Control KPI Dashboard Showing Process …
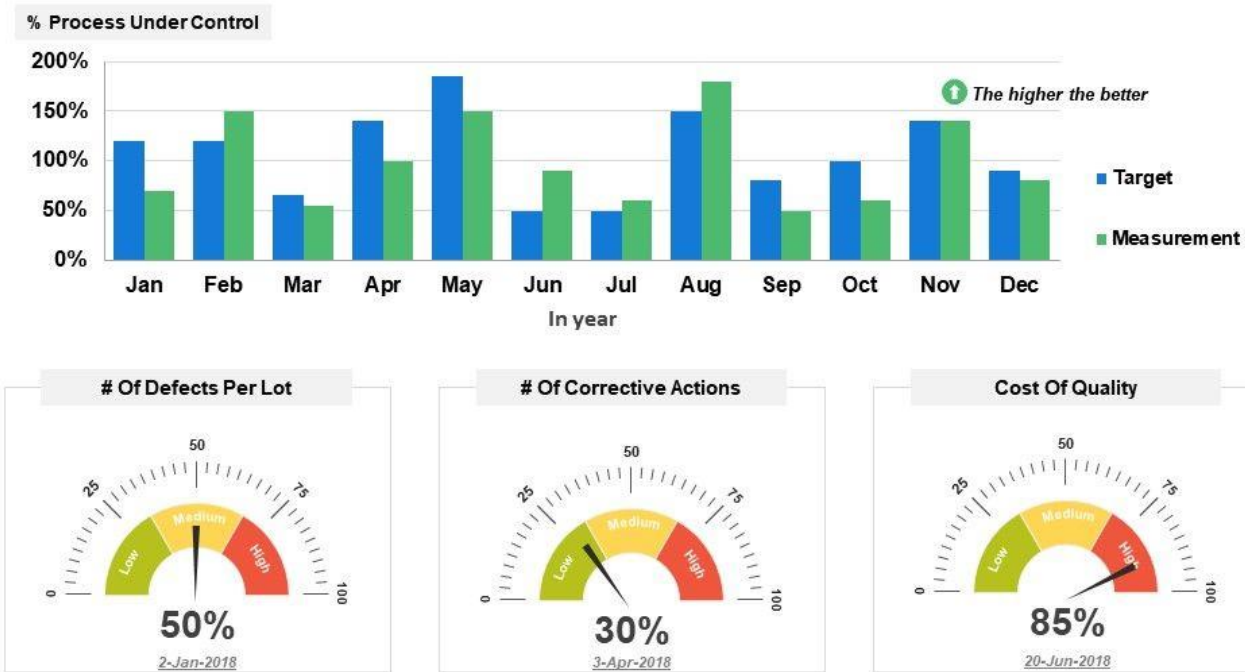
PART B

STRATEGIC PLANNING: FOCUS ON ACTION PLANS

Focus	Associated Elements
Analysis	1. Gather, analyze, and summarize information 2. Analyze information relating to the organization's value proposition and internal factors and external forces likely to impact its short and long term success
Formulation	3. Create (or verify) your organization's mission, vision, and sweet spot 4. Create strategic goal statements 5. Identify and prioritize the means by which you will achieve the strategic goals
Action Planning	**6. Identify tactics, assign roles and responsibilities, and timelines, and define metrics** **7. Plan for the unexpected and unanticipated**
Execution	8. Take steps to ensure constant and consistent execution throughout the entire organization
Continuous Improvement	9. Take steps to continuously improve

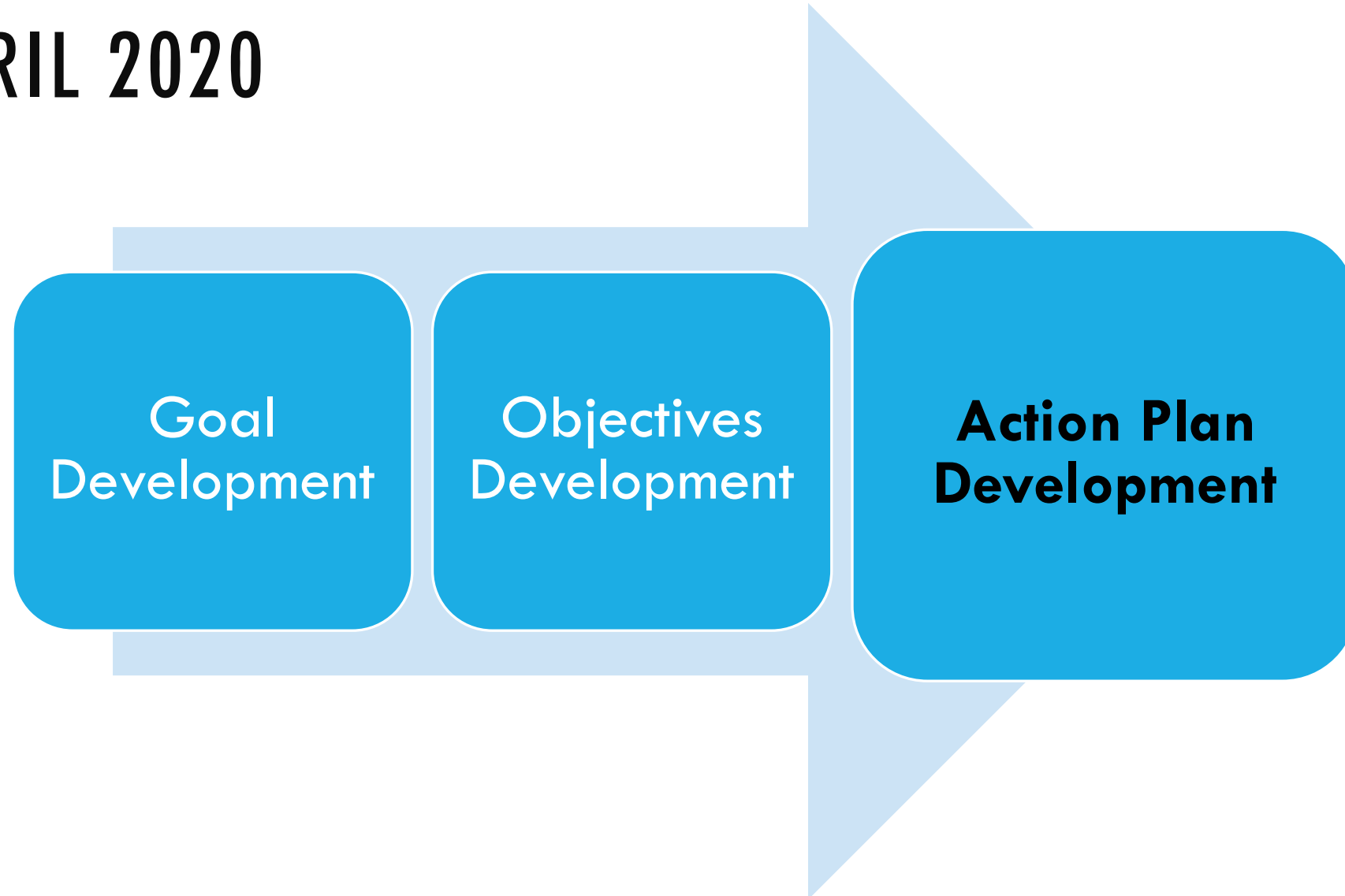Adapted from Strategic Planning: A practical guide to strategy formulation and execution

ACADEMY OF
PROCESS EDUCATORS

**Board Strategic Planning Workshop
Orientation to
Goals, Objectives,
& Action Plan Development
Tentative Timetable**

ACTION PLANS DEVELOPMENT

Action Plans

- What detailed steps do we take to accomplish the Objectives?
- Who is responsible?
- What resources will we commit?
- What is the schedule?

Creating Action Plan Template

- Objective(s) to be achieved
- Outcome(s) that result in Objective(s)-completion
- Metric(s) to be used; generation and distribution)
- Individual responsible (plus team members)
- Resources required (personnel, equipment, facilities, budgetary,..)
- Schedule with milestones and end date

PE ACTION PLANNING WORKSHEET

2	**OVERARCHING GOAL:**	**BY 2025, THE ACADEMY OF PROCESS EDUCATORS MODELS THE MINDSET AND BOLD ACTIONS OF A DELIBERATELY**
3		**DEVELOPMENTAL ORGANIZATION UNLOCKING THE SELF-POTENTIAL OF ITS MEMBERS AND CLIENT PARTNERS.**
4		**THROUGH THOUGHT LEADERSHIP, INNOVATIVE PRACTICES, EVIDENCE-BASED RESEARCH, AND EXPERT CONSULTANTS/STAFF,**
5		**WE EMPOWER TRANSFORMATIONAL CHANGE, RELENTLESSLY FOCUSED ON EACH INDIVIDUAL'S ASPIRATIONS, CONTRIBUTIONS,**
6		**AND ACCOMPLISHMENTS AS WELL AS THE ACADEMY'S VALUE AND STANDING IN THE HUMAN DEVELOPMENT SECTOR.**
7		
8	**STRATEGIC ISSUE:**	
9	**PRIORITY GOAL :**	
10		

	OBJECTIVES (1-2 yrs) (Results desired)	BENEFIT TO GOAL ACCOMPLISHMENT	ACTION PLANS (3-6 mos)	RESOURCES REQUIRED	COMPLETION TIME FRAME	RESPONSIBLE PERSON(S)	ASSESSMENT Frequency (qtrly)	SCHEDULE (begin - end)	SCORECARD OUTCOME MEASURES	ANNUAL EVALUATION
11-13										
14	O-1:									
15										
16										
17										
18	O-2:									
19										
20										
21										
22	O-3:									
23										
24										
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30	**Resource: Goals, Objectives & Action Plans PPT**
31	**Note: Assessment (quarterly, annual) periods will be set for the SP's implementation within Academy calendar**
32	**Note: Annual Evaluation of SP will be set for SP's implementation within Academy calendar**

QUESTIONS