# Essential Gear for PMs

**NK Shrivastava**, PMP, RMP, ACP
CEO/Consultant - RefineM

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## Agenda

1. What is Virtual Lunch & Learn
2. Your expectations from this webinar – why are you here?
3. Introduction – myself
4. Essential Gear for Project Managers
   - What is Essential Gear?
   - Why Essential Gear?
   - Who can be benefited by Essential Gear?
   - 5-8 indispensible processes (as many as possible to cover today)
5. Upcoming learning opportunities from RefineM
6. How to get 1 PDU for this webinar?
7. Q & A

## RefineM's Virtual Lunch & Learn

This is a monthly webinar delivered during the lunch hour on the first Wednesday of every month.
*This month it is on first Friday.*

It's designed to help you learn while you eat lunch, providing a relaxed environment to enhance your experience.

The monthly webinars will cover a variety of Project Management topics.



## Your Expectations

What are your expectations from this webinar?

Why are you here today?

# NK Shrivastava, PMP, RMP, ACP

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**Helping organizations turn their project management capability into a *competitive advantage***

* CEO/Consultant since Dec 2011
  * Agile Coaching/Adoption
  * Project Management/ Process Improvement Consulting and Training
  * Project Management Products (for PMs, Executives and Agile Practitioners)
* Board Member – SWMO Chapter since 2009

My professional journey b/f RefineM

* 20+ years of Successful Project Leadership
  * Led 100s of projects of all sizes, successfully
  * Recovered many projects, saved millions of $
  * Implemented numerous process improvements
  * Coached/mentored 100s of PMs, and some executives



# About You

* How many projects do you manage at a time?
* What is the size of your typical project?
  * ✓ Project duration in months
  * ✓ Average team size
* What are your top 2 challenges to deliver projects?
* What are your go-to processes that you never skip?

## So What Is Essential Gear?

* *PMBOK* describes 47 project management processes. In general, how many do you use in your projects?
* Essential Gear (level 1) are the ***eight*** indispensible PM processes stripped down to the bare essentials
* What you need to deliver your project successfully
* ***No more. No less.***

***Minimum processes. Maximum Benefits.***

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## Why Essential Gear?

* The path to project success can be like navigating a complex maze
* Full of wrong turns and dead ends
* ***Essential Gear*** is designed to help you up and out of the maze and on the right path

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## Essential Gear Level1 - Processes

1. Project Charter
2. Stakeholder Analysis
3. WBS
4. Resource Allocation
5. Project Schedule
6. Communication Plan
7. Risk Register
8. Performance Reporting

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## Essential Gear for PMs – Level 1

You may get maximum benefit from Level 1 if

1. *You manage 2-6 projects at any given time*
2. *Projects duration last 4-12 months and may involve 4-8 team members (FTE)*
3. *Your projects may total up to 200 person months in a year*
4. *You may manage a team of about 16-18 team members who work on different projects throughout the year*

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## Essential Gear for PMs – Level 1

### Startup PMOs can also benefit from Essential Gear

1. *Essential Gear can provide a jump start for the new PMOs*
2. *They can use Essential Gear tools, templates and best practices as a starting point, and enhance this process set over a period of time.*
3. *They can cut down 3-6 months of time to define essential processes for them by adopting time tested Essential Gear processes.*

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## Essential Gear Level 1 – Processes

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# 1. Project Charter(ing)

1. How many of you use this process?
2. How many find it helpful?

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## Project Charter - Definition

* What is a project charter?
  - ✓ The project charter is a document that authorizes a project and contains the initial requirements of the project that satisfy the stakeholders' expectations

* What is its purpose?
  - ✓ The purpose of the project charter is to document and showcase the project to the stakeholders or clients and formally get the authorization of those who would be willing to invest in the project

## Project Charter - Contents

The key elements that reveal the importance and need of the project, its outcome with the initial information of the project in the project charter are:

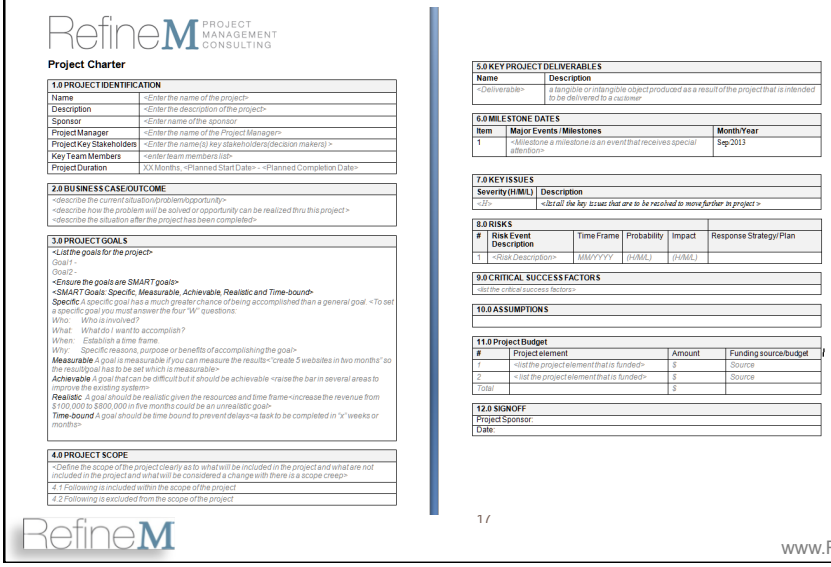
- ✓ Project identification
- ✓ Business case
- ✓ Project objectives/goals (what is the difference?)
- ✓ Project scope
- ✓ Major deliverables & milestones dates
- ✓ Key issues
- ✓ Major risks and their initial responses
- ✓ Critical success factors
- ✓ Major assumptions
- ✓ Project budget including contingency reserve
- ✓ Signoff



## Project Charter - Best Practices

- Prepare a project charter for ***every*** project
- Identify ***key*** stakeholders
- Appoint the PM, ***even before*** the charter is created, ideally he/she should be part of project charter development.
- Identify all possible project ***risks***
- ***Collaborate***: Develop the Project charter with major stakeholders
- Clearly document in scope and ***out of scope*** requirements
- Clearly document all the ***assumptions***

# Project Charter - Tools and Templates



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**Project Charter**

| 1.0 PROJECT IDENTIFICATION | |
|---|---|
| Name | <Enter the name of the project> |
| Description | <Enter the description of the project> |
| Sponsor | <Enter name of the sponsor |
| Project Manager | <Enter the name of the Project Manager> |
| Project Key Stakeholders | <Enter the name(s) key stakeholders(decision makers) > |
| Key Team Members | <enter team members list> |
| Project Duration | XX Months, <Planned Start Date> - <Planned Completion Date> |

**2.0 BUSINESS CASE/OUTCOME**

<describe the current situation/problem/opportunity>
<describe how the problem will be solved or opportunity can be realized thru this project >
<describe the situation after the project has been completed>

**3.0 PROJECT GOALS**

<List the goals for the project>
Goal1 -
Goal2 -
<Ensure the goals are SMART goals>
<SMART Goals: Specific, Measurable, Achievable, Realistic and Time-bound>
*Specific* A specific goal has a much greater chance of being accomplished than a general goal. <To set a specific goal you must answer the four "W" questions:
Who: Who is involved?
What: What do I want to accomplish?
When: Establish a time frame.
Why: Specific reasons, purpose or benefits of accomplishing the goal>
*Measurable* A goal is measurable if you can measure the results<"create 5 websites in two months" so the result/goal has to be set which is measurable>
*Achievable* A goal that can be difficult but it should be achievable <raise the bar in several areas to improve the existing system>
*Realistic* A goal should be realistic given the resources and time frame<increase the revenue from $100,000 to $800,000 in five months could be an unrealistic goal>
*Time-bound* A goal should be time bound to prevent delays<a task to be completed in "x" weeks or months>

**4.0 PROJECT SCOPE**

<Define the scope of the project clearly as to what will be included in the project and what are not included in the project and what will be considered a change with there is a scope creep>

4.1 Following is included within the scope of the project

4.2 Following is excluded from the scope of the project

**5.0 KEY PROJECT DELIVERABLES**

| Name | Description |
|---|---|
| <Deliverable> | a tangible or intangible object produced as a result of the project that is intended to be delivered to a customer |

**6.0 MILESTONE DATES**

| Item | Major Events / Milestones | Month/Year |
|---|---|---|
| 1 | <Milestone a milestone is an event that receives special attention> | Sep 2013 |

**7.0 KEY ISSUES**

| Severity (H/M/L) | Description |
|---|---|
| <If> | <list all the key issues that are to be resolved to move further in project > |

**8.0 RISKS**

| # | Risk Event Description | Time Frame | Probability | Impact | Response Strategy/Plan |
|---|---|---|---|---|---|
| 1 | <Risk Description> | MM/YYYY | (H/M/L) | (H/M/L) | |

**9.0 CRITICAL SUCCESS FACTORS**

<list the critical success factors>

**10.0 ASSUMPTIONS**

**11.0 Project Budget**

| # | Project element | Amount | Funding source/budget |
|---|---|---|---|
| 1 | <list the project element that is funded> | $ | Source |
| 2 | < list the project element that is funded> | $ | Source |
| Total | | $ | |

**12.0 SIGNOFF**

Project Sponsor:
Date:

1 /

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# Project Charter - Pitfalls

* Starting a project without developing a charter
* Starting a project without proper approvals even if charter was developed
* Missing a major stakeholder
* Not listing what is out of scope
* Not spending any or sufficient time to identify risks
* Not listing major assumptions

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# 2. Stakeholder Analysis

1. How many of you use this process?
2. How many find it helpful?

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## Stakeholder - Definition

* A Stakeholder
  - ✓ Is someone affected by the project outcomes or project activities
  - ✓ Is someone who can influence the project outcomes or project activities
* Primary vs. Secondary Stakeholders
  - ✓ Primary stakeholders have a stake in the project and are involved in all aspects of the project
  - ✓ Secondary stakeholders have indirect impact on the business operations or growth

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## Stakeholder - Best Practices

* Define WHO is a "Stakeholder"
  - ✓ Who has a stake or
  - ✓ Who has ability to influence
* Identify ALL the Stakeholders
* Develop Stakeholder Register
* Perform Stakeholder analysis to develop
  - Stakeholder Influence Matrix
  - Stakeholder Engagement Matrix



## Stakeholder - Tools and Templates

* Stakeholder Register
* Stakeholder Influence Matrix
* Stakeholder Engagement Matrix

# Stakeholder Register

| S.No | FirstName | LastName | Department/ Group | Role | Internal/External | Preferred Communication | Expectations | Interest | Influence | Result |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | NK | Shrivastava | production | PM | Internal | Monthly Meeting | on time, on budget | Positive | High | Champions |
| 3 | Andrew | Young | Vendor Evaluation | Vendor | Internal | Phone | project success | Positive | High | Champions |
| 4 | Gene | Fuller | | | External | Weekly Meeting | contract given to a | Positive | Low | Advocates |
| 5 | George | Costanza | Purchase | Supplier | External | Monthly Meeting | | Negative | High | Barriers |
| 6 | Cosmo | Kremer | Supplier | | Internal | Weekly Status Report | | Negative | High | Barriers |
| 7 | Jerry | Little | Supplier | | External | | | Negative | Low | Bystanders |

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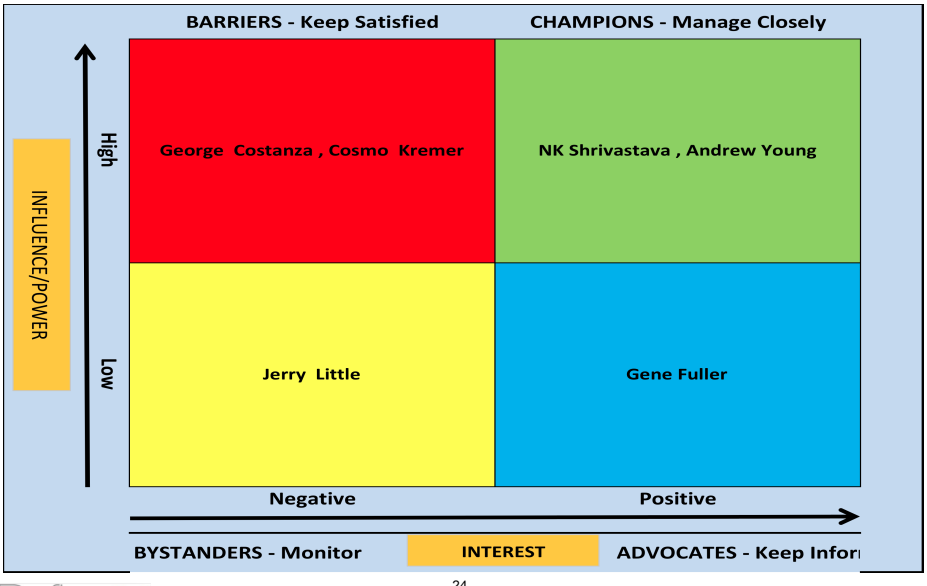
# Stakeholder Influence Matrix

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# Stakeholder Engagement Matrix

| S.No | FirstName | LastName | Unaware | Resistant | Neutral | Supportive | Leading |
|---|---|---|---|---|---|---|---|
| 1 | NK | Shrivastava | | | | | C,D |
| 3 | Andrew | Young | | | | C | D |
| 4 | Gene | Fuller | | | C | | D |
| 5 | George | Costanza | | C | | D | |
| 6 | Cosmo | Kremer | | C | | D | |
| 7 | Jerry | Little | | C | D | | |
| 8 | Debbie | King | | | C | D | |
| 9 | Robin | George | C | | | D | |
| 10 | Bernie | Gerwel | | | | | C,D |



# Stakeholder - Pitfalls

* Insufficient stakeholder analysis leading to missing stated and/or implied needs that may create havoc later
* Not developing a stakeholder influence matrix leaving room for communications gaps
* Not having a plan to improve stakeholder engagement

# 3. WBS

1. How many of you use this process?
2. How many find it helpful?

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## WBS - Definition

* A Work Breakdown Structure (WBS)
  - ✓ Is a grouping of project elements which organizes and defines the total scope of the project
  - ✓ Each descending level represents an increasingly detailed definition of a project component. Project components may be products or services
  - ✓ The smallest element is called a work package

***WBS provides a basis for overall scope, effort and cost of the project.***

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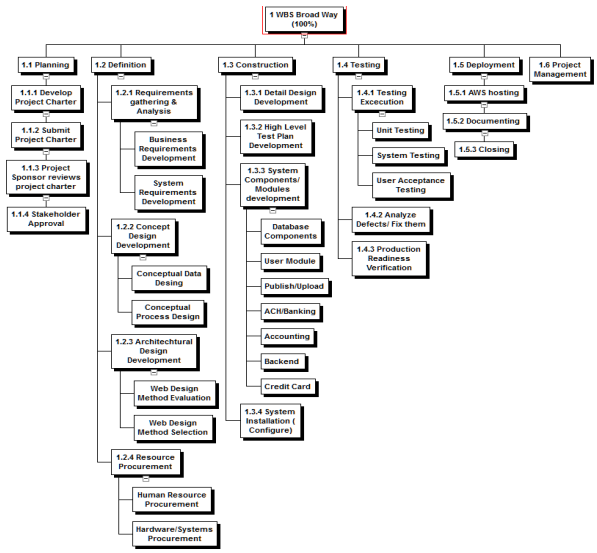
# WBS - Best Practices

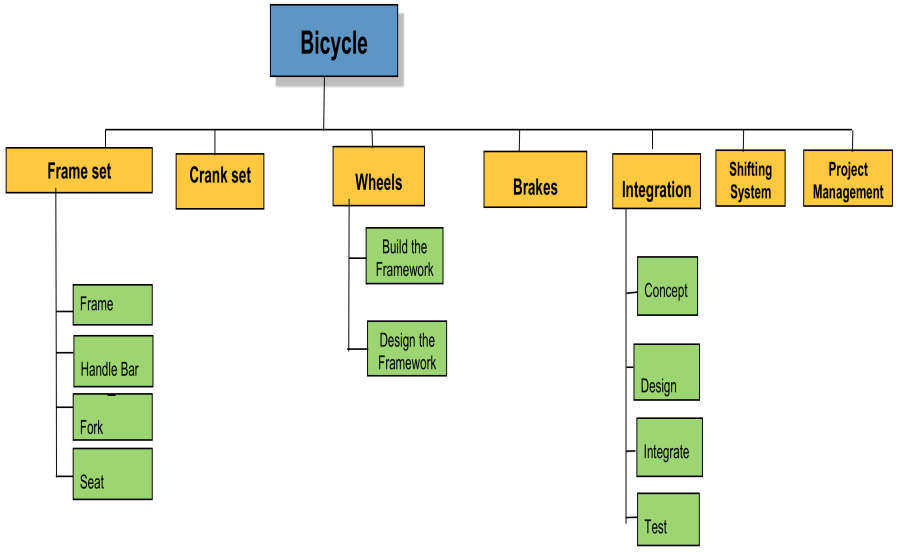
* Involve as many stakeholders (including team members) as possible in creating WBS
* Ensure each element in WBS has “time” and “cost” estimates
* Use 3-point estimates wherever good estimates are not available
* No work package should exceed more than 80 hours, in general
* Ensure the lowest level elements have been assigned to specific team member(s)
* The WBS should be verified and approved by the relevant stakeholders and revised when required



# WBS – An Example



# WBS – Another Example

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# WBS – Tools & Template

| Level | Task | Assigned To | Start Date | Low Hours | Likely Hours | High Hours | PERT Hours | End Date | Cost ($) @ 50/hr |
|---|---|---|---|---|---|---|---|---|---|
| 0 | Bicycle | Phillip | 8/23/13 | 80 | 95 | 140 | 100 | 9/4/13 | 4200 |
| 1 | Frame set | John | 2/17/13 | 7 | 12 | 35 | 15 | 2/18/13 | 750 |
| 2 | Frame | | 2/17/13 | 3 | 5 | 19 | 7 | 2/18/13 | 350 |
| 2 | Handlebar | | 2/17/13 | 0.25 | 1 | 7.75 | 2 | 2/18/13 | 100 |
| 2 | Fork | | 2/17/13 | 0.25 | 2 | 9.75 | 3 | 2/18/13 | 150 |
| 2 | Seat | | 2/17/13 | 0.25 | 2 | 9.75 | 3 | 2/18/13 | 150 |
| 1 | Crank set | Joe | 2/18/13 | 2 | 4.5 | 10 | 5 | 2/19/13 | 50 |
| 1 | Wheels | Patrick | 2/18/13 | 19 | 25 | 61 | 30 | 2/22/13 | 1500 |
| 2 | Front wheel | | 2/18/13 | 7 | 12 | 35 | 15 | 2/22/13 | 750 |
| 2 | Rear wheel | | 2/18/13 | 7 | 12 | 35 | 15 | 2/23/13 | 750 |
| 1 | Braking system | Heather | 2/20/13 | 2 | 4.5 | 10 | 5 | 2/24/13 | 50 |
| 1 | Shifting system | Billy | 2/21/13 | 2 | 4.5 | 10 | 5 | 2/25/13 | 50 |
| 1 | Integration | Cathy | 2/22/13 | 19 | 25 | 61 | 30 | 2/26/13 | 1750 |
| 2 | Concept | | 2/23/13 | 0.25 | 2 | 9.75 | 3 | 2/27/13 | 150 |
| 2 | Design | | 2/24/13 | 2 | 4.5 | 10 | 5 | 2/28/13 | 250 |
| 2 | Assembly | | 2/25/13 | 8 | 5 | 32 | 10 | 2/28/13 | 500 |
| 2 | Testing | | 2/26/13 | 7 | 12 | 47 | 17 | 2/28/13 | 850 |
| 1 | Project Management | Derrick | 2/27/13 | 2 | 4.5 | 10 | 5 | 2/28/13 | 50 |

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## WBS - Pitfalls

* Not creating WBS and jumping to start the project
* Leaving WBS without estimating time and cost
* Leaving WBS without assignments
* Neglecting to create a WBS dictionary
* Adding requirements instead of tasks



## 4. Resource Allocation

1. How many of you use this process?
2. How many find it helpful?

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## Resource Allocation - Definition

- Resource allocation is
  - ✓ The process of assigning the available resources in an economic way
  - ✓ The scheduling of activities and the resources required by those activities while taking into consideration both the resource availability and the project time

***Resources are scarce, they should be carefully allocated.***



## Resource Allocation - Best Practices

- Allocate resources with long-term project pipeline in mind
- Allocate resources with a goal to minimize frequent changes to assignments
- Allocate all category of resources (people, material and equipment, not just people) to projects
- Allocate resources with a goal to create a good team environment (who works well with who?)
- Avoid allocating 100% of resource time to project tasks, 80% is a good starting point

***100% allocation increases uncertainty***

# Resource Allocation - Tools & Templates

| Labor Required | | | Resource Plan | | |
|---|---|---|---|---|---|
| Role | Number | Responsibilities | Sill-Set | Start-Date | End-Date |
| • Project Manager | 3 | • Cost management<br>•Quality Management<br>• People Management | • MS Project Office<br>• Excel<br>• Visio | | |

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# Resource Allocation - Tools & Templates

| Material Required | | | Resource Plan | |
|---|---|---|---|---|
| Item | Components | Amount | Start-Date | End-Date |
| • office supplies | • Paper reams<br>• Printer Catridges<br>• Files , Folders | • 100<br>• 4<br>• 300 | | |

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## Resource Allocation - Tools & Templates

| Equipment Required | | Resource Plan | | | |
|---|---|---|---|---|---|
| Item | Number | Purpose | Specification | Start-Date | End-Date |
| • Print Room Equipment | 1 | • Printing<br>• Scanning<br>• Fax<br>• Photostat | • Lexmark 1400 | | |

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## Resource Allocation - Pitfalls

- Over/under allocation – not balancing resources
- Not allocating all category of resources (people, material and equipment), just the people to project tasks
- Allocating 100% of resources' time to project activities
- Avoiding resource allocation for the entire phase/project

# 5. Project Schedule

1. How many of you use this process?
2. How many find it helpful?

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## Project Schedule - Definition

- Project Schedule is
  - ✓ A listing of a project milestones, activities, and deliverables with a planned start and end dates
  - ✓ Those items are often estimated in terms of resources, duration and cost
  - ✓ Linked by dependencies and scheduled events
  - ✓ Closely related to the terminal elements of WBS

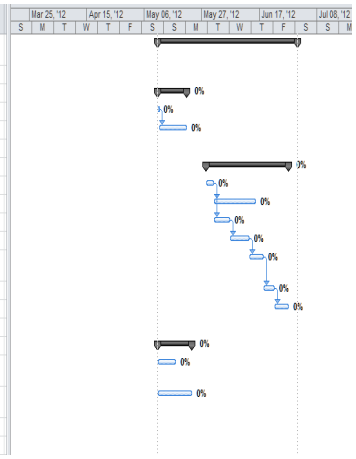
## Project Schedule – Best Practices

- Create WBS before developing the project schedule
- Create resource sheet and calendars before entering the tasks
- Only one task in a project should be entered without a predecessor
  - ✓ This would be the task that starts the project
- Only one task in a project should be without a successor
  - ✓ This would be the closing task for the project
- All tasks should have a "Work" (hours) value when being assigned to resources
- Do not assign resources to the summary tasks, why?
- Do not create predecessor/successor relationships between summary tasks
- Remember to baseline the schedule after it has been finalized



## Project Schedule - Tools & Templates

| | Task Name | Work | Duration | % Complete | Start | Finish | Resource | Predecessor | Baseline Start | Baseline Finish |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Project Meyer in Production | 446 hrs | 37 days | 0% | 05/11/12 | 06/30/12 | | | 05/11/10 | 05/28/12 |
| 2 | | | | | | | | | | |
| 3 | Task1 | 9 hrs | 6.38 days | 0% | 05/11/12 | 05/21/12 | | | 05/11/12 | 05/18/12 |
| 4 | Develop code | 3 hrs | 0.38 days | 0% | 05/11/12 | 05/11/12 | Andy | | 05/11/12 | 05/12/12 |
| 5 | Code review | 6 hrs | 6 days | 0% | 05/11/12 | 05/21/12 | Andy[13%] | 4 | 05/13/12 | 05/18/12 |
| 6 | | | | | | | | | | |
| 7 | Task2 | 336 hrs | 22.25 days? | 0% | 05/28/12 | 06/27/12 | Martin | | 05/11/12 | 05/31/12 |
| 8 | Develop code | 23 hrs | 2.88 days? | 0% | 05/28/12 | 05/31/12 | Duane | | 05/28/12 | 05/31/12 |
| 9 | Code review | 12 hrs | 11.54 days | 0% | 05/31/12 | 06/15/12 | Duane[13%] | 8 | 05/11/12 | 05/28/12 |
| 10 | Test code | 30 hrs | 3.75 days? | 0% | 05/31/12 | 06/06/12 | Anthony | 8 | 05/18/12 | 05/23/12 |
| 11 | Deliver code | 9 hrs | 5 days | 0% | 06/06/12 | 06/13/12 | Anthony[23%] | 10 | 05/11/12 | 05/17/12 |
| 12 | Retest and bug fixing | 27 hrs | 3.38 days | 0% | 06/13/12 | 06/18/12 | Tom | 11 | 05/11/12 | 05/16/12 |
| 13 | Run the tests | 34 hrs | 4.25 days? | 0% | 06/18/12 | 06/22/12 | Angelina | 12 | 05/11/12 | 05/17/12 |
| 14 | fix the snaglist | 23 hrs | 3 days | 0% | 06/22/12 | 06/27/12 | Peter[96%] | 13 | 05/16/12 | 05/18/12 |
| 15 | | | | | | | | | | |
| 16 | Task3 | 101 hrs | 8.38 days? | 0% | 05/11/12 | 05/23/12 | | | 05/11/12 | 05/23/12 |
| 17 | Subtasks for task3 | 34 hrs | 4.25 days? | 0% | 05/11/12 | 05/17/12 | Robert | | 05/11/12 | 05/17/12 |
| 18 | subtasks for task3 | 67 hrs | 8.38 days | 0% | 05/11/12 | 05/23/12 | Henry | | 05/11/12 | 05/23/12 |



## Project Schedule - Pitfalls

* Overly optimistic estimates
* Failure to do peer review
* Using a tool like MS Project without proper training – may make you crazy
* Abandoning a schedule during project execution



## 6. Communication Plan

1. How many of you use this process?
2. How many find it helpful?

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## Communication Plan- Definition

- Communication Plan describes
  - ✓ What will be communicated? The information
  - ✓ When will it be communicated? The time period/frequency
  - ✓ Why will it be communicated? The need
  - ✓ Who will communicate it? The sender
  - ✓ Who will receive it? The receiver
  - ✓ How will the communication occur? The mode/technology



## Communication Plan – Best Practices

- Complete stakeholder analysis before developing the communication plan
- Analyze all communication channels [n*(n-1)/2]
- Keep organization structure and culture in mind
- Identify all sources of "noise" that can interrupt or reduce effectiveness of communication
- Facilitate open, honest and timely communication

# Communication Plan - Tools & Templates

| What (Event) | Who (Target) | Why (Purpose) | When (Frequency) | How (Medium) | Who (Provider) |
|---|---|---|---|---|---|
| Describe the event | Define who all are the target audience | Define what is the purpose of this event | Frequency of communication | Medium of Communication | Person Responsible |
| Initiation Meeting | All stakeholders | Gather requirements | Before the project start date | Group meeting | Project Manager |
| Milestone Report | Project Sponsor | Communicate plan to stakeholders | Before the project start date | Meeting | Project Office |
| Status Report | Project Manager | Update stakeholders | monthly | Meeting | Project Manager |
| Oursourcing Performace | Staff and Customer | update customer | bimonthly | Meeting | Project Manager |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |



# Communication Plan - Pitfalls

* Some stakeholders may not included in the communication plan
* Analysis of “noise” sources is ignored
* Communication plan can be one-off or one time activity
* Communication plan is not kept current, and updated as the project progresses

# 7. Risk Register

1. How many of you use this process?
2. How many find it helpful?

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## Risk Register - Definition

* Risk Register
  - ✓ Is a risk management tool that acts as a central repository of all project risks identified throughout the project duration
  - ✓ Includes all information about every risk such as
    - ✓ Risk description
    - ✓ Probability of occurrence
    - ✓ Impact on project, if it occurred
    - ✓ Risk trigger
    - ✓ Response strategy and response
    - ✓ Risk Owner

## Risk Register - Contents

- **Date:** As the risk register is a living document, it is important to record the date that risks are identified or modified. Optional dates to include are the target and completion dates
- **Risk ID:** A unique identifying number for the risk
- **Risk description**: A brief description of the risk, its causes and its impact
- **Risk response:** The action which is to be taken if the risk occurs
- **Trigger:** Something which indicates that a risk is about to occur or has already occurred
- **Risk owner:** The person whom the project manager assigns to watch for triggers, and manage the risk response if the risk occurs
- **Probability:** The likelihood (probability) rating for the risk, using scales using % and L/M/H priority
- **Impact:** Number of days that can delay the actual schedule
- **Expected Monetary Value:** Probability X Impact



## Risk Register - Best Practices

- Identify risks and create risk register for every project, small or big
- Collect as much information as possible and reasonable for every risk and update risk register with that information
- Involve everyone on the team in risk identification meetings
- Use Risk Breakdown Structure (RBS) as a checklist to identify all sources of risks
- Review risks and update risk register at regular intervals throughout the duration of the project

# Risk Register - Tools & Templates

**Project:** **Risk Register:**

| Risk ID | Risk Description | Date | Pobability | | Impact (delay in # of days) | Expected Monitory Value (Probaility * Impact) | Risk Owner | Risk Response | Trigger |
|---|---|---|---|---|---|---|---|---|---|
| | | | % | L/M/H | | | | | |
| 1 | Data model changes & Impacts | 7/1/2013 | 25% | M | 10 | 2.5 | George | Description | |
| 2 | Mapping Grid document | 7/2/2013 | 10% | M | 8 | 0.8 | Allen | Description | |
| 3 | Data Architecture fields impact | 7/3/2013 | 15% | L | 5 | 0.75 | Kramer | Description | |
| 4 | Data Migration | 7/4/2013 | 50% | H | 15 | 7.5 | Linda | Description | |
| 5 | Auditing reports | 7/5/2013 | 15% | L | 5 | 0.75 | Ellis | Description | |
| | | | | | | | | | |
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# Risk Register - Pitfalls

* Mixing of issues with risks
* Ignoring or underestimating a risks
* Not doing right amount of risk analysis
* Failing to communicate risks with appropriate/all stakeholders
* PM developing risk register on his/her own without involving everyone
* Developing a risk register but not updating it throughout the project duration, thereby loosing opportunity to identify more risks



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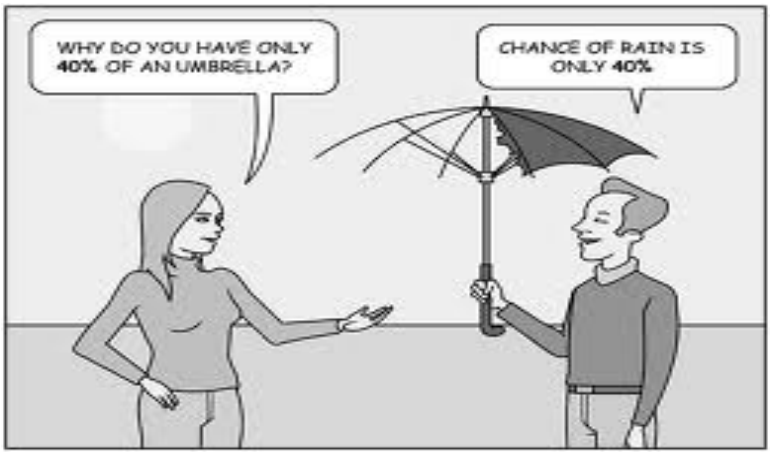
## ☺ Another view on risk ☺



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## 8. Performance Reporting

1. How many of you use this process?
2. How many find it helpful?

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## Performance Reporting- Definition

* Performance Reporting
  - ✓ Is the process of providing status of the project including but not limited to deliverables, milestones, activities, cost/budget, quality, risks and issues
  - ✓ Can be of following types
    - ✓ General Performance reporting
    - ✓ Financial reporting (revenue, cost, gross margin, ROI, IRR etc.)
    - ✓ Portfolio reporting (status of projects in the portfolio)
    - ✓ Quality reporting (about quality parameters such as defects, changes etc.)



## Performance Reporting - Best Practices

* Trial balloon method is a good practice (creating reports on a trial and error basis based on approval from stakeholders)
* One report does not serve all audience so create reports based on a specific audience
* Reporting variances (actual vs. planned values) helps more clarity
* Performance reporting should be included in communication plan
* Include following if no reporting requirements were specified
  - ✓ What was accomplished in the last reporting period?
  - ✓ What is planned for next 2 (at least) reporting periods?
  - ✓ Are there any show stoppers or risks that need immediate attention?
  - ✓ Variances (planned vs. actual) costs and timeframes
  - ✓ Trends/projections (estimate to complete – time and cost)

## Performance Reporting - Tools & Templates

| Team Member | Achievements/Milestones Completed (in the past week) | Assignments (for next 2 weeks) | Major Issues/Concerns (that may impact progress in future) |
|---|---|---|---|
| TM1 | | | |
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| TM2 | | | |
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| TM3 | | | |
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| TM6 | | | |
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| TM7 | | | |
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## Performance Reporting- Pitfalls

* A generic reporting process may be misleading to many stakeholders
* Inaccurate reporting or reporting not based on facts/data is misleading
* Reporting without variances and trends may not provide much value to the stakeholders
* Not reporting risks and issues will make the project manager look reactive vs. proactive



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## A Few Final Questions

1. Of the 8 processes covered, which do you plan to start to implement?
2. Are there any processes that you do not plan to implement?
3. Do you think any of these processes can help you address the PM challenges you identified at the start of this talk?



## More Learning Opportunities From RefineM

* **All About User Stories – On Feb 12, 2014**
  - ✓ 1-day class delivered in person
  - ✓ Scheduled for Feb 12, 2014 from 8:30am-4:30pm CT
  - ✓ Venue – eFactory, 405 N Jefferson Ave, Springfield, MO, USA
  - ✓ Earn 7 PDUs (if you need them)

* **Several in-person and virtual courses coming up in 2014 – stay tuned**

More info at http://refinem.com/news-and-events/

## How to Claim 1 PDU for this Webinar?

- PDU Category – B, Continuing Education
- Program Title – Webinar on "Essential Gear for Projects Managers"
- Date Started – Today's date
- Date Completed – Today's date
- Hours Completed – 1.00
- Provider
  - ✓ Name – RefineM
  - ✓ Phone # 417-414-9886
  - ✓ Email – nks@refinem.com
- PDUs Claimed – 1.00

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## Essential Gear for PMs – Level 1

Product Launch Scheduled for February 2014 !

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