Do More With Less

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

RefineM PROJECT MANAGEMENT CONSULTING

www.RefineM.com

Agenda

1. What is Virtual Lunch & Learn
2. Your Expectations from this Webinar
3. Introduction – Myself
4. Do More With Less
   a. **Introduction to Approach of Doing More With Less**
   b. **What constitutes the essential processes?**
   c. **More about the essential processes**
   d. **Conclusion**
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 in the first week (Wednesdays) of every month.

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 / Agile topics.

Your Expectations

What are your expectations from this webinar?

Why are you here today?

NK Shrivastava, PMP, RMP, ACP, CSM

RefineM

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

My professional journey b/f RefineM

* CEO/Consultant since Dec 2011

    * Agile Coaching/Adoption

    * Project Management/ Process Improvement Consulting and Training

    * Project Management Toolkits (for PMs, Executives and Agile Practitioners)

* 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

    * Board Member – SWMO PMI Chapter (2008-2014)

RefineM

Do More With Less

- Introduction to Approach of Doing More With Less
- What constitutes the essential processes?
- More about the essential processes
- Conclusion

RefineM PROJECT MANAGEMENT CONSULTING

Today's Project Environment

* There is a growing need to deliver projects successfully:
  - ✓ Faster
  - ✓ Using fewer resources
  - ✓ With a more limited budget

Finding the right balance of processes is critical

The "Sweet Spot"

* Too many processes? Wasting time
* Too few processes? Introducing too many risks

So, where is the sweet spot?

The Approach

* 25 years of experience in project management
  - ✓ When these processes used, projects succeeded
  - ✓ Review of failing projects: one or more processes missing
* Contribution of Lean principles
* Surveyed project managers to get their inputs

About Our Survey

* Conducted of project managers via Survey Monkey

* Goals

  ✓ Gauge respondents' views on project management

  ✓ Whether they feel stressed or calm to manage projects?

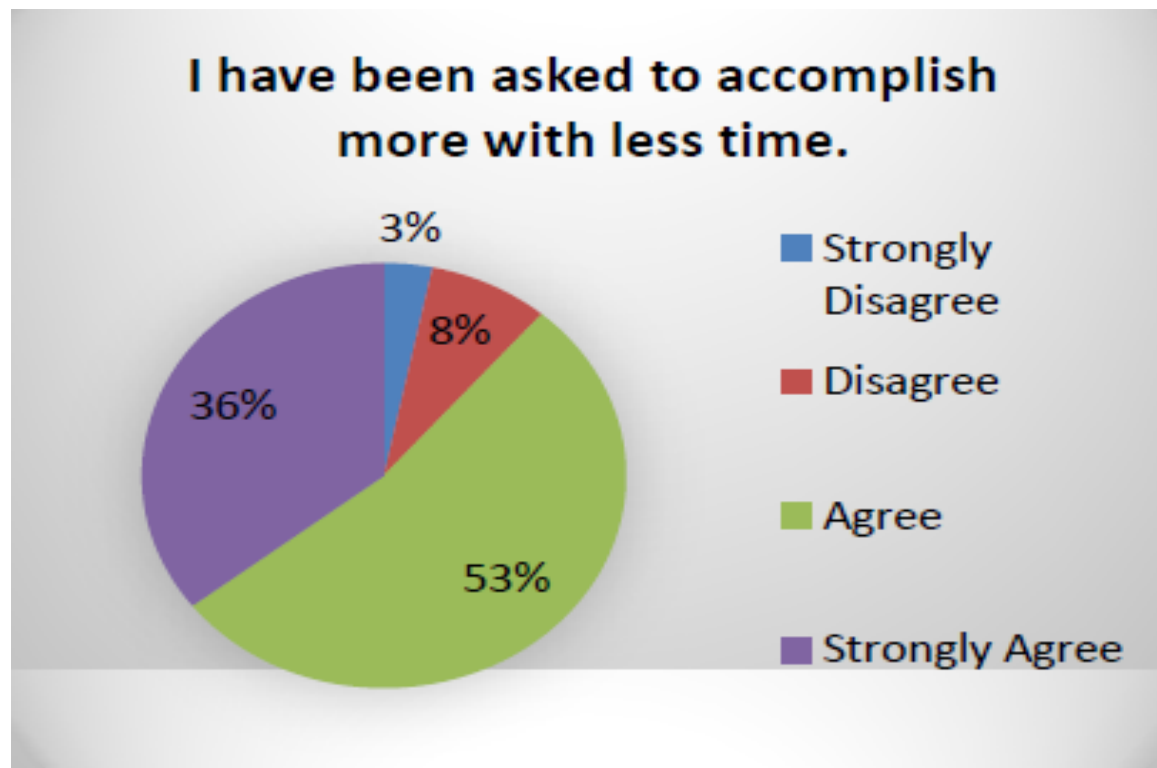 ✓ Are there ways to help project managers and PMOs?

RefineM

Survey Responses
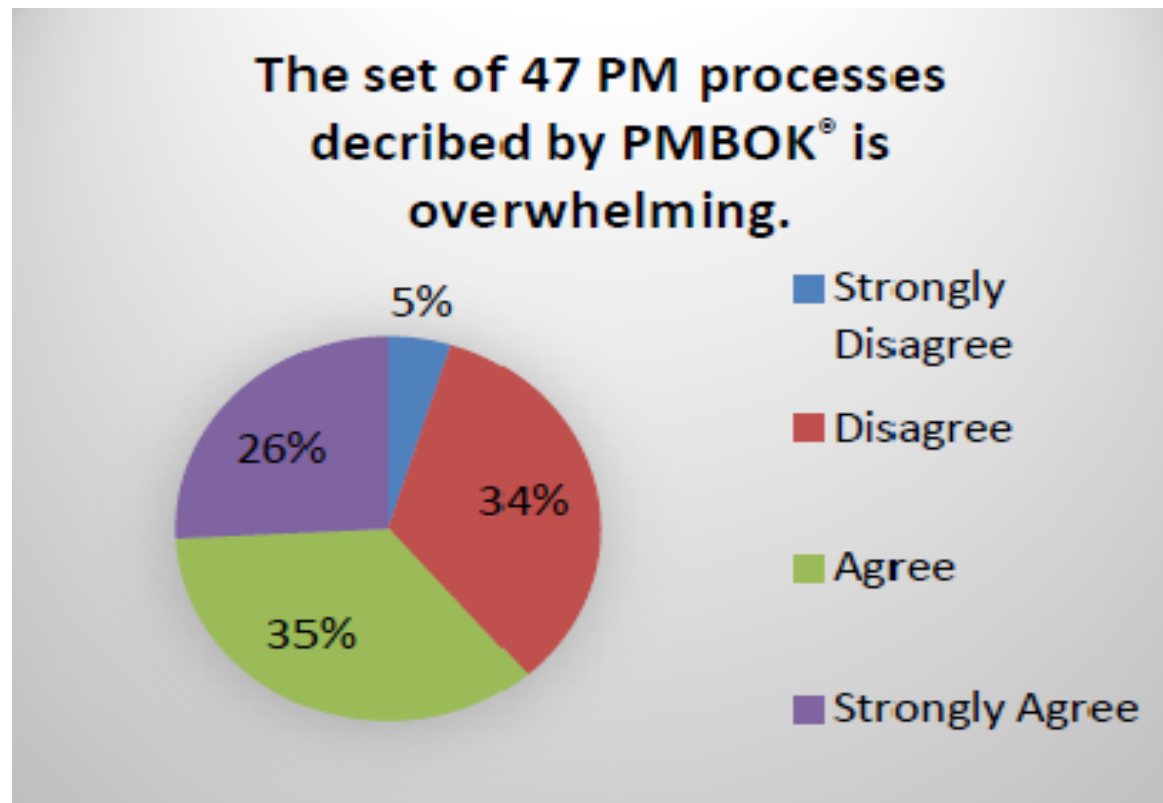
Is project management becoming more difficult over time?
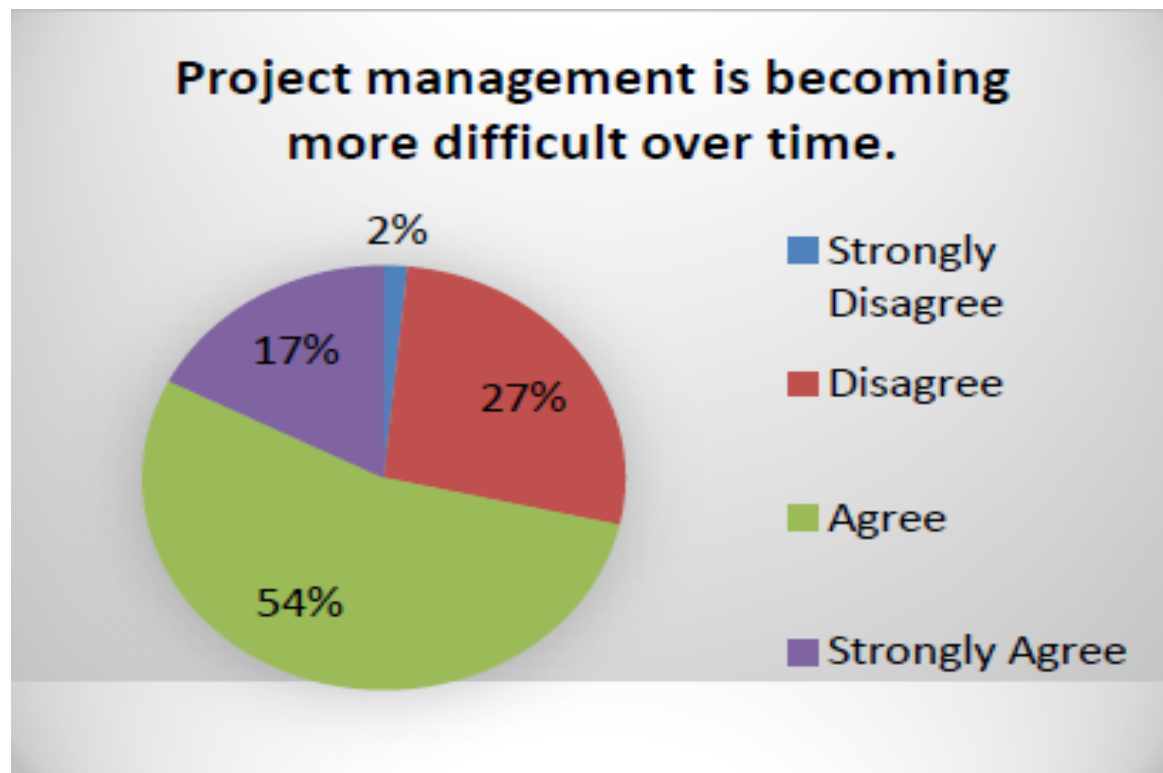
Survey Responses

Have you been asked to accomplish more with less?

Survey Responses

Is the set of 47 *PMBOK® Guide* processes overwhelming to you?

The set of 47 PM processes decribed by PMBOK® is overwhelming.

- 5% — Strongly Disagree
- 34% — Disagree
- 35% — Agree
- 26% — Strongly Agree

Survey Responses

Would a smaller set of processes be helpful?
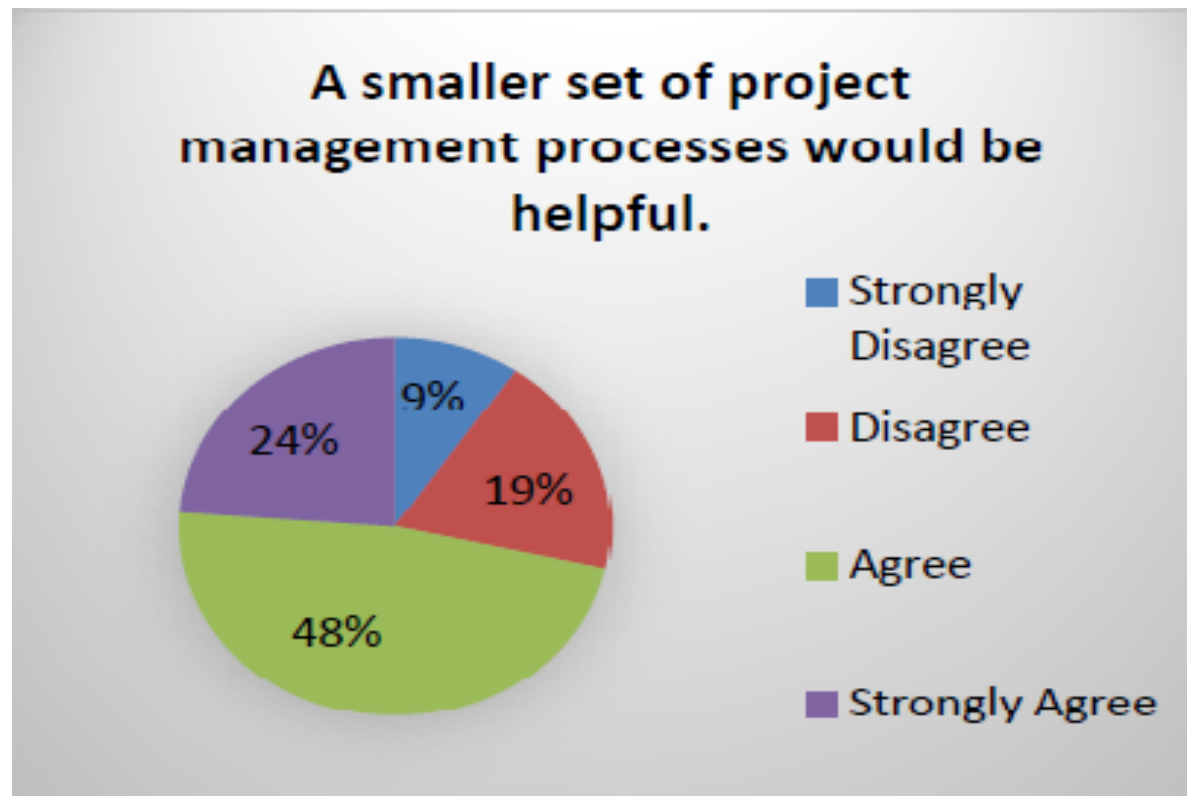
The Eight Processes

1. Project Charter

2. Stakeholder Analysis

3. Work Breakdown Structure

4. Resource Allocation

5. Project Schedule

6. Communication Plan

7. Risk Register

8. Performance Reporting

The Fitness Test

Project/Program:	#s
Size (S, M, L)	M
Number of Projects	2-6
Number of Team Members	4-8
Duration (months)	4-12

Overall size: 16-18 team members or 200 person months per year

RefineM

8 Essential Processes

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

RefineM

1. Project Charter

2.0 BUSINESS CASE/OUTCOME

The exiting websites of various departments are integrated and the overall maintenance individually has increased significantly. The university is going to integrating all the services on campus on one portal to make the communication more transparent and effective that would reduce the overall maintenance cost. After the completion of this website all the departments will be under one banner

3.0 PROJECT GOALS

Goal 1: The IT team will be in-charge of creating the framework by the end of march that would be useful for developing all the modules

Goal 2: complete 2 modules by may 24th for review and approval by the client

Goal 3: There is need for 2 Project Managers to be allocated to this project before Jan 5th 2013

4.0 PROJECT SCOPE

The website should have following functionality/feature

- *A comprehensive, interactive, effective and esthetically pleasing Internet presence for the Meyer Which reflects the qualities and strengths of the Meyer and the university via a positive, professional presentation;*
- *Supports collaboration within and outside the Meyer, as well as building the Meyer community;*
- *Supports MEYER communications and endeavors to integrate existing printed publications, electronic communiqués and other communication vehicles.*
- *Addresses the information needs of external audiences including alumni, the public, potential faculty, students, patients, staff, healthcare providers, and other universities/organizations;*
- *Addresses the information needs of internal audiences including administration, faculty, staff, and students;*
- *Supports the recruitment of faculty, post-doctoral candidates and all students;*
- *Augments support for work processes, including the use of applications, e-transactions and automated processes for content management;*

Description

* Authorizes project

* Establishes high-level scope, schedule, budget, risks

* Establishes baselines, assumptions, common ground

* Gets everyone on board

* No project charter = no project

* Without charter, project can close early

Why else is the project charter essential?

How to Implement

* List of stakeholders, including sponsor and key roles

* Project Description, Business Case / Outcome

* Project Scope (in and out) and Key Deliverables

* Milestones and Associated Dates

* Key Issues and Risks

* Critical Success Factors, Assumptions / Constraints

* High-Level Budget including Contingency Reserve

* Signoffs from Sponsors and Stakeholders

Best Practices and Pitfalls

Best Practices	Pitfalls
Include major stakeholders	Leaving out key roles
Account for: ✓ In / out of scope ✓ Risks ✓ Contingency Reserve ✓ Assumptions	Leaving out key components
Get approval before starting the project	Proceeding without approval

RefineM

8 Essential Processes

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

2. Stakeholder Analysis

Description

* Identifying stakeholders

* Creating the stakeholder register

* Performing stakeholder analysis

  ✓ Stakeholder Engagement Matrix

  ✓ Stakeholder Influence Matrix

* Stakeholders can remove barriers . . . or add them

Why else is stakeholder analysis essential?

Stakeholder Register

* Identify primary vs. secondary stakeholders
* Identify internal vs. external stakeholders

#	FirstName	LastName	Department/ Group	Role	Internal/ External	Preferred Communication	Expectations	Interest	Influence	Result
1	NK Shrivastava	Shrivastava	production	PM	Internal	Videoconference	On time, on budget	Positive	High	Champions
3	Keith Roberts	Roberts	Vendor Evaluation	Vendor	Internal	Face to Face	Clean Data	Positive	High	Champions
4	Andrew Fuller	Fuller			External	Weekly Meeting	Contract assigned	Positive	Low	Advocates
5	George Costanza	Costanza	Purchase	Supplier	External	Monthly Meeting		Negative	High	Barriers
6	Cosmo Kremer	Kremer	Supplier		Internal	Weekly Report		Negative	High	Barriers
7	Sri Vidya	Vidya	Supplier		External	Phone		Negative	Low	Bystanders

RefineM

Influence Matrix
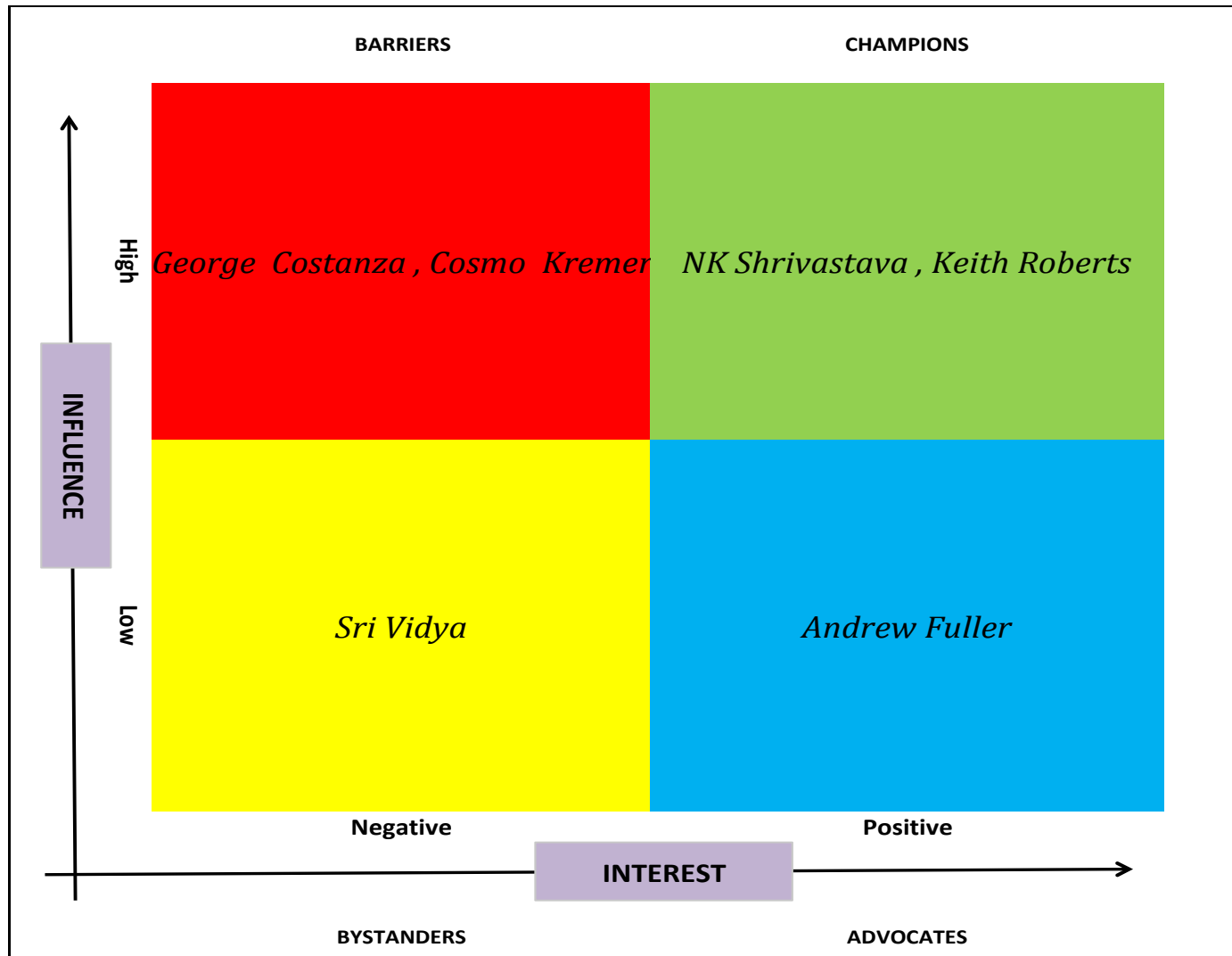
Engagement Matrix

| #	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	Taylor					C,D

Best Practices and Pitfalls

Best Practices	Pitfalls
Include all stakeholders	Missing stakeholders
Map stakeholders to communication plan	Developing a communication plan w/o stakeholder inputs
Have a plan for improving engagement levels	Letting others see sensitive information

RefineM

8 Essential Processes

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

3. Work Breakdown Structure
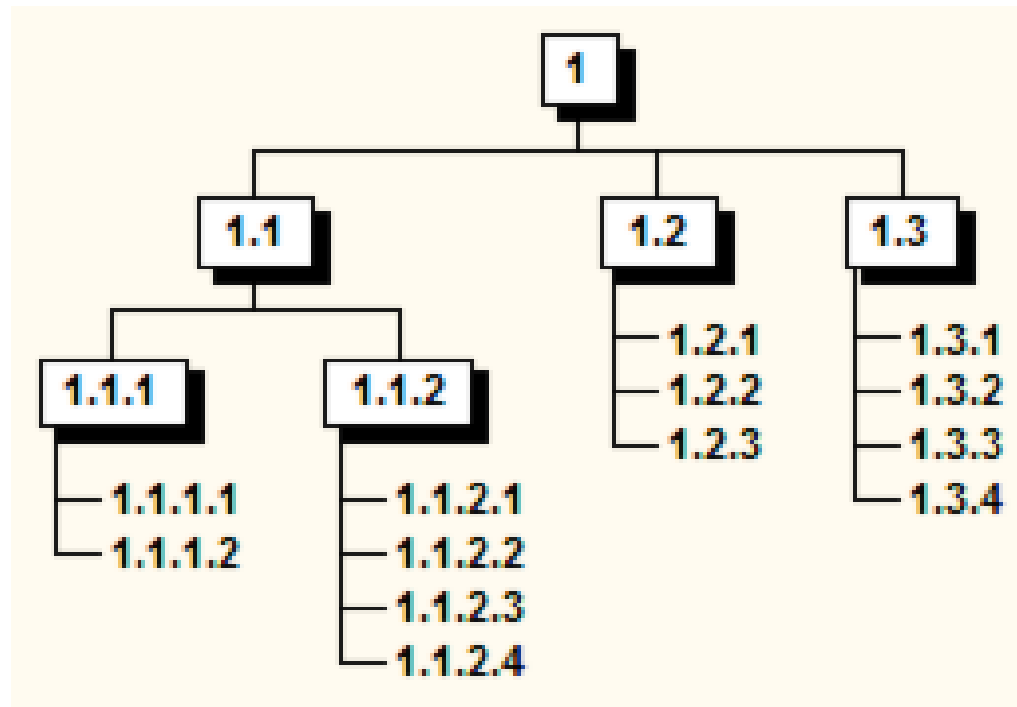
Description

* WBS is the hierarchy used to define project scope

* Provides framework for organizing, managing work

* Necessary part of determining schedule

  ✓ Activities come from work packages

  ✓ Without WBS, project can be hurt by scope creep

Why else is the WBS essential?

How to Implement

* Perform decomposition

* Some levels may go down farther than others

* Final level is work package level
  - ✓ Broken into activities later

Best Practices and Pitfalls

Best Practices	Pitfalls
Collaborating with key members of the team	Listing requirements instead of deliverables
Using 100% rule ✓ All work should add to 100%	Not checking to see if work equals 100%
Estimating work packages for time and cost and assigning them to team members	Decomposing too little or too much

8 Essential Processes

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

4. Resource Allocation

Description

* Process of managing people, equipment, materials

* Can be done with spreadsheet or Microsoft Project

* Managing availability and level of allocation

* Essential to win support from team, managers
  - ✓ Scheduling realistically helps achieve this

Why else is resource allocation essential?

How to Implement

* Collect information about project team, equipment, materials
  ✓ Determine availability, constraints
* Can use a spreadsheet or Microsoft Project

Template

Role	Number Required	Responsibilities	Skillset	Start Date	End Date
Project Manager	3	Cost, Quality, Human Resource Management	Microsoft Office (Project, Excel, Visio), Earned Value Management	2/12/14	8/12/14

Best Practices and Pitfalls

Best Practices	Pitfalls
Keeping long-term project pipeline in mind	Allocating without checking commitments or constraints
Considering team environment	Failing to update allocation
Keeping resource allocation at 80% maximum	Over-allocating resources

8 Essential Processes

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

RefineM

5. Project Schedule

Description

* Schedule provides time sequence for activities

* Pivotal tool for any project

* Aligns the team to milestones
  - ✓ Also key dates and deliverables

* Stakeholders will expect a schedule

Why else is the project schedule essential?

How to Implement

* Define activities from WBS

* Estimate activities' durations

* Determine dependencies between activities

* Assign resources

* Set up schedule in spreadsheet or Microsoft Project

RefineM

Template

ID	Task Mode	Task Name	Work	Duration	% Complete	Start	Finish	Predecessors
1		Project Complete	0 hrs	3 days	0%	8/22/13	8/26/13	
2		Major task1	0 hrs	2 days	0%	8/22/13	8/23/13	
3		Task1.1	0 hrs	1 day	0%	8/22/13	8/22/13	
4		Task1.2	0 hrs	1 day	0%	8/23/13	8/23/13	3
5		Task1.3	0 hrs	1 day	0%	8/23/13	8/23/13	3
6		Major task2	0 hrs	2 days	0%	8/22/13	8/23/13	
7		Task2.1	0 hrs	1 day	0%	8/22/13	8/22/13	
8		Task2.2	0 hrs	1 day	0%	8/23/13	8/23/13	7
9		Major task3	0 hrs	3 days	0%	8/22/13	8/26/13	
10		Task3.1	0 hrs	1 day	0%	8/22/13	8/22/13	
11		Task3.2	0 hrs	1 day	0%	8/23/13	8/23/13	10
12		Task3.3	0 hrs	1 day	0%	8/26/13	8/26/13	11

RefineM

Best Practices and Pitfalls

Best Practices	Pitfalls
Getting input from those performing work	Proceeding without input from key team members
Rooting estimates in reality, neither too pessimistic nor too optimistic	Using a scheduling tool without proper training
Updating schedule on regular intervals (weekly)	Abandoning schedule when it starts to slip

RefineM

8 Essential Processes

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

6. Communication Plan

Do You Agree?

* "Communication is the project manager's most important skill."

Agree? Or Disagree?

Description

* Communication Plan establishes:
  - ✓ What needs to be communicated
  - ✓ Who needs to send and receive communications
  - ✓ When and how often they need to send and receive
  - ✓ The purpose of communication and how it will occur

Why else is the communication plan essential?

Importance of Communication

* Communication is arguably the most important skill

* Open communication fosters:
  - ✓ Transparency
  - ✓ Creativity
  - ✓ Teamwork

How to Implement

* Start with the "who, what, where, when, why, how"

  ✓ **Who:** Providers and recipients

  ✓ **What:** Push, pull, interactive communication

  ✓ **Where:** F2F, Email, Videoconference/phone

  ✓ **When:** Frequency

  ✓ **Why:** Purpose to inform, persuade, or entertain

  ✓ **How:** What technology is used

RefineM

Template

What (Event)	Who (Target)	Why (Purpose)	When (Frequency)	How (Medium)	Who (Provider)
Describe the event.	**Define the target audience.**	**Define the purpose of this event.**	**Set the frequency of communication.**	**Define the medium of communication.**	**Identify who is responsible.**
Initiation Meeting	All stakeholders	Gather requirements	Once before the project start date	Face-to-face meeting	Project Manager
Milestone Report	Project Sponsor	Communicate plan to stakeholders	Once before the project start date	Face-to-face meeting	PMO
Status Report	Project Manager	Update stakeholders	Monthly	Face-to-face meeting	Project Manager
Outsourcing Performace	Staff and Customer	Update customer	Bimonthly	Videoconference	Project Manager

RefineM

Best Practices and Pitfalls

Best Practices	Pitfalls
Using (n*(n-1)/2) to assess channels	Failing to identify sources of noise
Assessing available infrastructure	Failing to identify all communication events
Completing stakeholder analysis first	Failing to update as new stakeholders come in or leave

8 Essential Processes

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

7. Risk Register

Description

* Project hub for collecting:
  * ✓ Risks, owners, root causes, responses
  * ✓ Probability and Impact
* Risks can be catastrophic
  * ✓ Especially if you are unprepared
* Risks can also be opportunities – don't miss them

Why else is the risk register essential?

How to Implement

* Collect risk information

* Place into event description format:
  * ✓ "If **cause,** then **event**, causing **consequence."** OR
  * ✓ "**Event** may occur, causing **consequence.**"

* Analyze probability and impact

* Develop risk response plan

* Assign risk owners

Template

Risk ID	Risk Description	Risk Date	Probability		Impact		EMV		Risk Owner	Risk Response
			%	L/M/H	(Days)	(Cost)	(Days)	(Cost)		
1	Too many data model changes	12/01/13	25%	M	10	$1,000.00	2.5	$250.00	George	Ensure good review of data
2	Mapping Grid document is not ready i	11/15/13	10%	M	8	$500.00	0.8	$50.00	Allen	Monitor closely, every week
3	Team Member A leaves the project	12/15/13	70%	H	6	$1,500.00	4.2	$1,050.00	Kremer	Prepare backup
4	Data Migration is not complete by pla	12/15/13	50%	H	5	$2,500.00	2.5	$1,250.00	Linda	Monitor closely, every week
5	Team members are reassigned to othe	11/01/13	50%	M	20	$3,000.00	10.0	$1,500.00	Ellis	Ensure project remains high

RefineM

Best Practices and Pitfalls

Best Practices	Pitfalls
Looking for all potential sources of risks	Failing to update risk register on regular basis
Collaborating with stakeholders, team members, vendors & suppliers	Failing to identify key stakeholders
Considering opportunities	Missing opportunities

RefineM

8 Essential Processes

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

8. Performance Reporting

Description

* Performance report may include:
  - ✓ Deliverables
  - ✓ Milestones
  - ✓ Activities
  - ✓ Cost/Budget
  - ✓ Quality
  - ✓ Risks/Issues
* Decisions need to be backed up by data

Why else is performance reporting essential?

How to Implement

* Decide metrics to collect, frequency, report format

* Get approval on these

* Backward-looking (historical analysis)

* Forward-looking (forecast)

* Can use spreadsheet, document, specialized tools

Template

Team Member	Achievements/Milestones Completed (in the past week)	Assignments (for next 2 weeks)	Major Issues/Concerns (that may impact progress in future)
John	Finished WBS.	Create project schedule	One week behind on schedule
Carol	Met with stakeholders	Create stakeholder engagement matrix	Many stakeholders have negative perception of project
Brad			
TM4			
TM5			

Best Practices and Pitfalls

Best Practices	Pitfalls
Considering audience needs	Failing to provide complete report
Getting explicit reporting requirements from stakeholders	Missing variances and trends (too subjective)
Including variances, trends, projections	Missing risks and issues (too reactive)

RefineM

www.RefineM.com

Survey Responses

How often do you use each of the following processes on your projects?				
Process	**Almost always (over 75%)**	**Often (50-75%)**	**Sometimes (25-50%)**	**Rarely/Never (less than 25%)**
Project Charter	54%	10%	16%	20%
Stakeholder Analysis	26%	29%	18%	27%
WBS	40%	17%	27%	16%
Resource Allocation	40%	26%	19%	15%
Project Schedule	83%	13%	2%	2%
Communication Plan	41%	22%	21%	16%
Risk Register	29%	19%	32%	20%
Performance Reporting	43%	24%	13%	20%

Conclusion

* To complete projects successfully:

    * Focus on bare essential processes

    * Execute the essentials correctly and consistently throughout the duration of the project

That's the recipe of doing "more with less"

More Learning Opportunities From RefineM

Training	Atlanta, GA	Overland Park, KS	Charlotte, NC
PM Fundamentals	Mar 30-31	Apr 13-14	May 11-12
Agile Fundamentals*	Apr 01-02	Apr 15-16	May 13-14
PMI-ACP® Exam Prep**	Apr 01-03	Apr 15-17	May 13-15

*Also offered in Springfield on Feb 19 &20
**Also offered as a 4-day instructor-led online course May 4-7

PMP® Exam Prep will also be held in Springfield, MO May 19-22.

Visit http://refinem.com/trainings/ for more details

RefineM

www.RefineM.com

RefineM Customized Training

We also offer customized trainings, On-site & Virtual

Topics include Agile, Project Management, Strategy, Leadership, Process Improvement, and PMI Certifications.

More info at http://refinem.com/trainings/

March Lunch and Learn

* ***The Four Faces of Leadership***
  - ✓ How to create the right blend of people development, team empowerment, and personal enrichment?
  - ✓ What are the "four different faces" of interpersonal interactions?

* ***Guest Presenter: Ulka Shrikande***

* ***Wednesday, March 4, 12:00-1:00 PM Central***

Register Today - Don't wait for the last Minute

RefineM

How to Claim 1 PDU for this Webinar?

* PDU Category – B, Continuing Education
* Program Title – Webinar on "Do More With Less"
* 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

Questions?

NK Shrivastava, MBA, PMP, RMP, ACP

CEO/Consultant, RefineM

Nixa, MO 65714, USA

nks@refinem.com, www.refinem.com

http://www.linkedin.com/in/nkshrivastava

justrightpm

www.RefineM.com