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The Recipe for Successful Project Delivery

NK Shrivastava, PMP, RMP, ACP, CSP, SPC4
CEO/Consultant/Enterprise Agile Coach - RefineM

Agenda

1. Introductions and Expectations

2. The Recipe for Successful Project Delivery

   a. Introduction to the Recipe

   b. What are the most essential PM processes?

   c. More about the essential PM processes

3. Final Q & A

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Your Expectations

What are your expectations from this webinar?

Why are you here today?

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

NK Shrivastava
PMP, RMP, ACP, CSP, SPC4

- CEO/Enterprise Agile Coach/Consultant since Dec 2011
    - Agile Transformation/Coaching/Adoption
        - Enterprise Agile Coach @ IBM
    - Project Management/Process Improvement Consulting and Training
    - Products for Project Professionals
        - Essential Gear for Project Managers
        - PMP Exam Simulator
        - PMP Videos at Vimeo

- 20+ years of successful project leadership
    - Successfully led hundreds of projects of all sizes
    - Recovered many projects, saved millions of dollars
    - Implemented numerous process improvements
    - Coached/mentored hundreds of PMs and executives
    - Board member of SWMO PMI Chapter (2008-2014)

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Why use recipe when cooking?

- Recipes include just the right amount of ingredients
  - ✓ No more, no less

- Recipes are consistent
  - ✓ Follow the recipe the right way and you get the same result or close

- Anyone can pick up the recipe and start using it
  - ✓ May not be right the first time but will get it with practice

  What is the recipe for successful project delivery?

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Today's Project Environment

- Not enough to just deliver projects successfully

- They need to be delivered:
  - ✓ Faster, to achieve time to market and profitability
  - ✓ Using fewer resources, to save overhead
  - ✓ With a more limited budget, due to competing priorities

Finding the right balance of processes is critical

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The "Sweet Spot"

- Too many processes? Wasting time

- Too few processes? Introducing too many risks

So, where is the sweet spot?

Survey – Ingredients for a Successful Project

What are the key ingredients for a successful project?
(choose your top 5)

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
9. Earned Value Management
10. Lessons Learned
11. Change Management
12. Requirements Traceability Matrix
13. Quality Metrics
14. Subcontract Management

Take the survey – 1 minute

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The Recipe Approach

- 30 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

- Applying and getting results from the recipe

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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*

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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

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1. Project Charter

- 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

What are other reasons your project should have a charter?

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Project Charter Template

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Project Charter Template

The purpose of the project charter is to authorize the project, to define scope, stakeholders, milestones, issues, risks, assumptions, and budget at a high level, and to secure signoff from internal stakeholders.

1.0 PROJECT IDENTIFICATION

1.1. Name	<Enter the name of the project.>
1.2. Description	<Enter the description of the project.>
1.3. Customer	<Enter the name of the customer.>
1.4. End User	<Enter the name of the end user.>
1.5. Project Manager	<Enter the name of the assigned Project Manager.>
1.6. Key External Stakeholders	<Enter the names of key external stakeholders and decisionmakers; for example, vendor contacts, general contractor contacts, or government or public entities.>
1.7. Key Internal Stakeholders	<Enter the names of key internal stakeholders and decisionmakers.>
1.8. Key Team Members	<Enter team members>
1.9. Project Duration	<Enter project duration in number of months and planned start date to planned completion date; for example, "6 months, January-June 2018.">

2.0 BUSINESS CASE/OUTCOME (OPTIONAL)

2.1. <Describe the current situation, problem, or opportunity. Next, describe how the situation or problem can be resolved, or opportunity realized, through this project. Finally, describe the intended situation after the project has been completed.>

3.0 PROJECT GOALS

3.1. <List the goals for the project below. These goals should be SMART: Specific, Measurable, Achievable, Realistic and Time-bound. Goals should at least be **measurable** and integrated with performance reporting for the project.>

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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.>

4.1. The following items are **included** within the scope of the project.
- 4.1.1. <First high-level item to be **included**>
- 4.1.2. <Second high-level item to be **included**>.
- 4.1.3. <Third . . . add more lines as needed>.

4.2. The following items are **excluded** from the scope of the project.
- 4.2.1. <First high-level item to be **excluded**>
- 4.2.2. <Second high-level item to be **excluded**>.
- 4.2.3. <Third . . . add more lines as needed>.

5.0 KEY PROJECT DELIVERABLES

Name	Description
5.1. <Deliverable>	<List the deliverable name in the left column and describe it here. A deliverable is defined as a tangible or intangible object produced as a result of the project that is intended to be delivered to a customer.
5.2. <Deliverable>	<List the deliverable name in the left column and describe it here. A deliverable is defined as 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
6.1. A - External	All agreed-upon milestones with the customer. Also refer (hyperlink) to the contract for details.	06/2018
6.2. B – Internal	All important events that need to happen to make the project complete on time.	07/2018

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7.0 KEY ISSUES (KNOWN)

Severity (H/M/L)	Description
<H>	7.1. <List issues in priority order and assign a severity of High (H), Medium (M), or Low (L). An issue is a known factor that the project team needs to be aware of, or an event that has 100% certainty of happening during the project.>

8.0 RISKS (POTENTIAL ISSUES THAT MAY OR MAY NOT HAPPEN)

#	Risk Event Description	Time Frame	Probability	Impact	Response Strategy/Plan
8.1.	<Risk Description, for example: a. Project delay causing financial implication	MM/YYYY	(H/M/L)	(H/M/L)	<Define the risk response plan.>

9.0 CRITICAL SUCCESS FACTORS

<List the project's critical success factors. For example:>
9.1. Effective communication among stakeholders and with customers.
9.2. Employee training on a particular task.
9.3. Outsourcing a particular product.

10.0 ASSUMPTIONS

<List important assumptions being made. For example:>
10.1. Funding and support from the sponsors will continue as planned.
10.2. The infrastructure will be sufficient to accommodate any new project proposals.
10.3. Additional safety requirements will apply.

11.0 PROJECT BUDGET

#	Project element	Amount	Funding source/budget
11.1.	<List the project element that is funded.>	$	Source
11.2.	<List the project element that is funded.>	$	Source
11.3.	<Contingency reserve for known risks.>	$	Source/Risk Register
Total	<Sum up the project elements>	$	

12.0 SIGNOFF

12.1. Key Internal Stakeholders (listed in Section 1.7) sign here:
- 12.1.1.
- 12.1.2.
- 12.1.3.

Date:

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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

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2. Stakeholder Analysis

- Identifying stakeholders
- Creating the stakeholder register
- Performing stakeholder analysis
    - ✓ Stakeholder Engagement Matrix
    - ✓ Stakeholder Influence Matrix
- Stakeholders can remove barriers . . . or add them

What are other reasons to perform stakeholder analysis?

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Stakeholder Register

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

Stakeholder Register Template

Project: [Enter Project Name]
Date: [Enter Current Date]

The purpose of the stakeholder register is to list all internal and external stakeholders and capture their details, including preferred communication, expectations, interest, and influence.

1. List all internal and external stakeholders.
2. List all the stakeholder information and fill the respective columns.

S.No	FirstName	LastName	Department/ Group	Role	Internal/ External	Preferred Communication	Expectations	Interest	Influence	Result	Notes
1	NK	Shrivastava	Production	PM	Internal	Videoconference	On time, on budget	Positive	High	Champions	In charge of production team.
2	Keith	Roberts	Vendor	Vendor	Internal	Face to Face	Project Success	Positive	High	Champions	
3	Andrew	Fuller	Vendor	Vendor	External	Weekly Meeting	Contract Assigned	Positive	Low	Advocates	
4	George	Jones	Purchase	Supplier	External	Monthly Meeting	Project Success	Negative	High	Barriers	
5	Chris	Young	Supplier	Supplier	Internal	Weekly Report	Project Success	Negative	High	Barriers	
6	Sri	Vidya	Supplier	Supplier	External	Phone	Project Success	Negative	Low	Bystanders	
7	Jerry	Little	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	High	Champions	
8	Debbie	Jacobs	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	High	Champions	
9	Robin	George	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	Low	Advocates	
10	Bernie	Smith	Temp Agency	Labor	External	Daily Meeting	Project Success	Positive	High	Champions	

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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

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3. Work Breakdown Structure

- 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
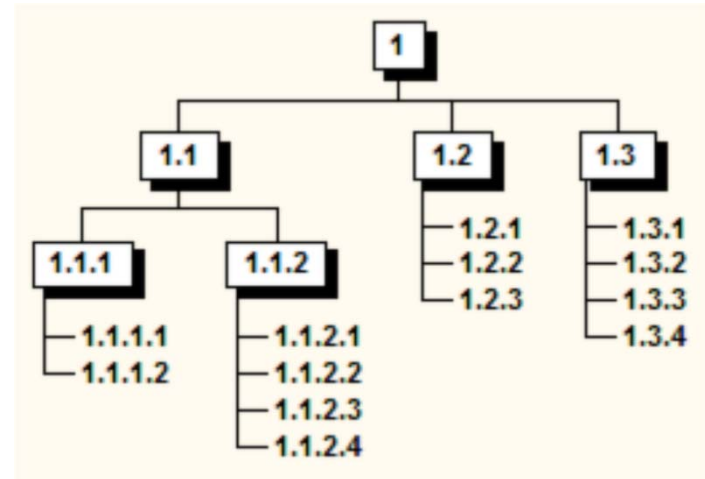
Why else should you use a WBS on your projects?

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WBS Template

Work Breakdown Structure (WBS) Template
Project: [Enter Project Name]
Date: [Enter Current Date]

The purpose of the Work Breakdown Structure (WBS) is to define the full scope of the project in term of deliverables, work packages, and activities.

1. List all deliverables, work packages, and associated activities.
2. List who each activity is assigned to and the estimated start and end dates.
3. Refer to the hierarchy example and other examples if you need clarification.

Deliverable (Level 0)	Work Package (Level 1)	Activities (Level 2)	Assigned To	Start Date	End Date
1.0. Project Planning, Scheduling and Tracking	1.1. Planning & Scheduling	1.1.1.			
	1.2. Tracking Activities & Deliverables	1.2.1.			
	1.3. Weekly Conference Call	1.3.1.			
	1.4. Writing Project Report	1.4.1.			
2.0 Application Process	2.1. Application Requirements	2.1.1. Requirements review			
	2.2. Application Submission	2.2.1. Final draft			
3.0. Approval Process	3.1. Approval Guidelines	3.1.1.			
	3.2. Collect Applications	3.2.1.			
	3.3. Score Applications	3.3.1. Convene committee			
		3.3.2. First round selection			
		3.3.3. Final round selection			

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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

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6. Communication Plan

- 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

What else should be included in a communication plan?

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Communication Plan Template

Communication Plan Template

The purpose of the communication plan template is to establish communication events, their providers and recipients, their purpose and frequency, their medium, and the deliverable of each in order to facilitate communication and documentation.

Project: [Enter Project Name]

Date: [Enter Current Date]

ID	What (Event)	Who (Target)	Why (Purpose)	When (Frequency)	How (Medium)	What (Deliverable)	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.	Define the documentation/follow-up item.	Identify who is responsible.
1	Initiation Meeting	All stakeholders	Gather requirements	Once before the project start date	Face-to-face meeting	Meeting minutes in project folder	Project Manager
2	Milestone Report	Project Sponsor	Communicate plan to stakeholders	Once before the project start date	Face-to-face meeting	Meeting minutes in project folder	PMO
3	Status Report	Project Manager	Update stakeholders	Monthly	Face-to-face meeting	Meeting minutes in project folder, To-Do List	Project Manager
4	Outsourcing Performance	Staff and Customer	Update customer	Bimonthly	Videoconference	Meeting minutes in project folder	Project Manager

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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

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7. Risk Register

- 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

What do you include in your risk register?

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Risk Register Template

Risk Register Template
Project: [Enter Project Name]
Date: [Enter Current Date]
The purpose of the risk register template is to log and track risks, risk probability and impact, and risk responses and triggers. It also totals Expected Monetary Value (EMV) to establish a risk contingency reserve.

1. Describe the risk and list the date up to when it could occur.
2. List probability and impact in days and dollars in columns D-G. Columns H and I will auto-populate.
3. Identify risk owner, risk response, and trigger for when the risk happens.

Risk ID	Risk Description	Risk Date	Probability %	L/M/H	Impact (Days)	(Cost)	EMV (Days)	(Cost)	Risk Owner	Risk Response	Trigger
1	Team Member A leaves the project	09/15/18	70%	H	6	$1,500.00	4.2	$1,050.00	Keith	Prepare backup	
2	Data Migration is not complete by planned date	10/31/18	50%	M	5	$2,500.00	2.5	$1,250.00	Andrew	Monitor closely, every week	
3	Team members are reassigned to other projects	12/01/18	50%	M	20	$3,000.00	10.0	$1,500.00	George	Ensure project remains high priority	
4	Project delay causing financial implication (Underbilled amount $100,000)	Project end date	90%	H	10	$4,000.00	9.0	$3,600.00	Divisional Manager	Ensure billing is on time, manage scope tightly, ensure you get change order	Progress report, resource decline
5	Delays due to weather conditions										

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

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My Recipe to Deliver Successful Projects

ESSENTIAL GEAR FOR PROJECT MANAGERS

Minimal Processes.

Maximum Benefit.

Find your way out of the maze today.

A package of 8 critical project management processes delivered via intuitive templates and a handbook that describes how to execute best practices and avoid pitfalls.

Learn more about Essential Gear:
https://www.refinem.com/products/essential-gear-for-project-managers/

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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 delivering projects successfully

Download a copy of this slide deck:
http://bit.ly/recipe-pm-slide-deck

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Questions?

NK Shrivastava,
MBA, PMP, RMP, ACP, CSP, SPC4

CEO/Enterprise Agile Coach, RefineM

Nixa, MO 65714, USA

nks@refinem.com, www.refinem.com

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

@justrightpm

Download a copy of this slide deck:
http://bit.ly/recipe-pm-slide-deck

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Supporting Slides

4. Resource Allocation

- 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

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Template

Resource Allocation Template

Project: [Enter Project Name]

Date: [Enter Current date]

The purpose of the Resource Allocation template is to list labor resources, quantities and skillsets required, and their availability to coordinate resource assignments.

1. List all labor resources, how many of each is required, and what their responsibilities and skillsets are.

2. List the expected Start and End dates for each resource.

Role	Responsibilities	Number Required	Skillset	Start Date	End Date
Project Manager	Cost, Quality, Human Resource Management	3	Microsoft Office (Project, Excel, Visio), Earned Value Management	6/1/2018	6/30/2018
Analysts	Business Analysis	3	Requirements Gathering, Microsoft Excel	6/1/2018	7/31/2018

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

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5. Project Schedule

- 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

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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

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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

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8. Performance Reporting

- Performance report may include:
  - ✓ Deliverables
  - ✓ Milestones
  - ✓ Activities
  - ✓ Cost/Budget
  - ✓ Quality
  - ✓ Risks/Issues

- Decisions need to be backed up by data

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Performance Reporting Template

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Weekly Performance Reporting Template
[Enter Project Name]
[Enter Current Date]

The purpose of the weekly performance reporting template is to track deliverables, targeted completion, and cost and report to stakeholders.

1. Enter the deliverable / top-level tasks from the Work Breakdown Structure (WBS) and assign responsibility.

2. Enter target completion date, original estimated costs, estimate to complete, and actual costs to date (columns C, E, F, and G).

3. Projected Costs and Projected vs. Estimate (Columns H and I) will auto-populate. Based on these, complete the % Complete (column D)

Top-Level WBS Tasks	Responsibility (Assigned To)	Target Completion Date	% Complete	Original Estimated Costs	Actual Costs To-Date	Estimate to Complete	Projected Costs	Projected Costs vs. Estimated Costs
Design			25%	$30,000.00	$5,000.00	$27,000.00	$32,000.00	$2,000.00
Approval								
Assembly								

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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)

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