

Eight Powerful PM Processes You Don't Want to Skip



RefineM PROJECT
MANAGEMENT
CONSULTING

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

Agenda

1. What is Virtual Lunch & Learn
2. Your expectations from this webinar – why are you here?
3. Introduction – myself
4. Eight Powerful PM Processes You Don't Want to Skip
 - a. Processes
 - b. Templates
 - c. Best Practices
 - d. Pitfalls
5. Upcoming learning opportunities from RefineM
6. How to get 1 PDU for this webinar?
7. Q & A

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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.



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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*

- * 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

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Eight Powerful PM 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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Project Charter

2.0 BUSINESS CASE/OUTCOME

The existing 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

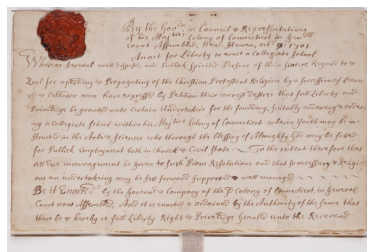
- A comprehensive, interactive, effective and esthetically pleasing Internet presence for the Meyer Which reflects the qualities and strengths of the Meyer and the university via a positive, professional presentation;
- Supports collaboration within and outside the Meyer, as well as building the Meyer 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;

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Why is the Project Charter Important?

- * Formally authorizes the project
- * Foundation for further planning
- * Captures key information
- * Encourages collaboration
- * Best Practices
 - ✓ Involve the project manager
 - ✓ Get all necessary approvals
 - ✓ Do not leave out any key person



No Charter = No Project

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Stakeholder Analysis



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Why is Stakeholder Analysis Important?

- * Stakeholders can help or hurt the project
 - ✓ Develop a plan to manage their expectations
- * Best Practices
 - ✓ Define who is a stakeholder
 - ✓ Define all stakeholders to avoid communication gaps
 - ✓ Develop and update stakeholder register
 - ✓ Use matrices to plan stakeholder engagement

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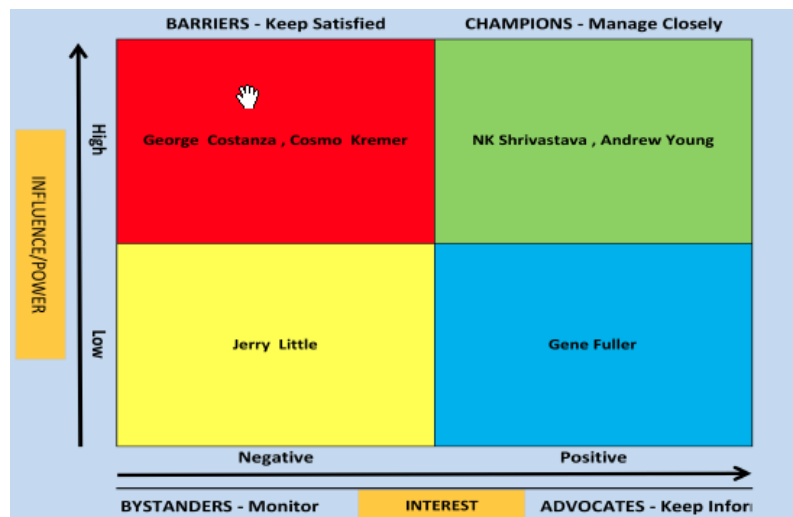
Stakeholder Register

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

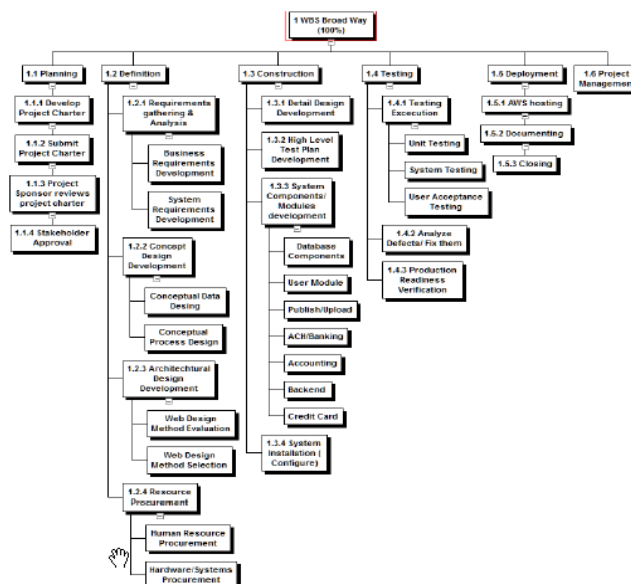
3. Attempt to move stakeholder engagement from left to right. (C=Current, D= Desired, level of engagement)

S.No	FirstName	LastName	Unaware	Resistant	Neutral	Supportive	Leading
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		

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WBS



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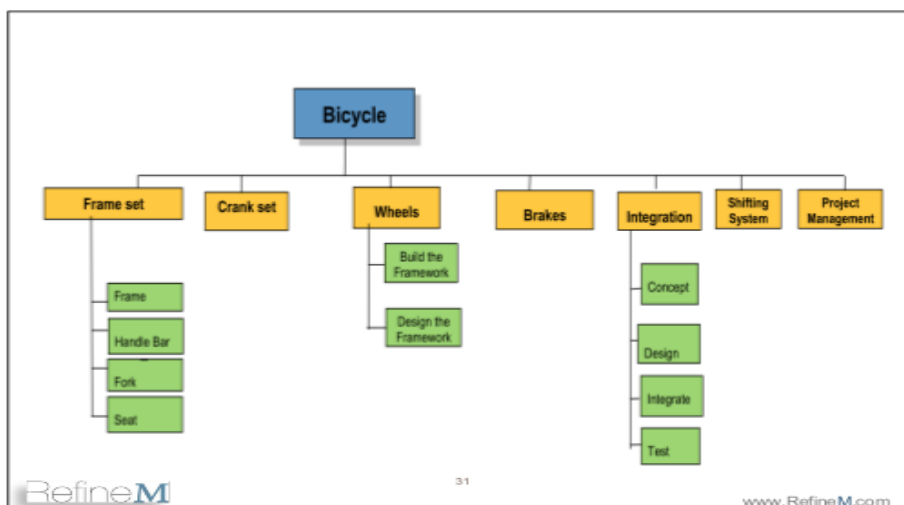
Why is WBS Important?

- * Divides project work into manageable portions
- * Helps control scope
- * Best Practices
 - ✓ Work packages should not exceed 35 hours
 - ✓ Lowest-level elements should be assigned to specific team members
 - ✓ Revise WBS based on collaborative input

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Another WBS Example



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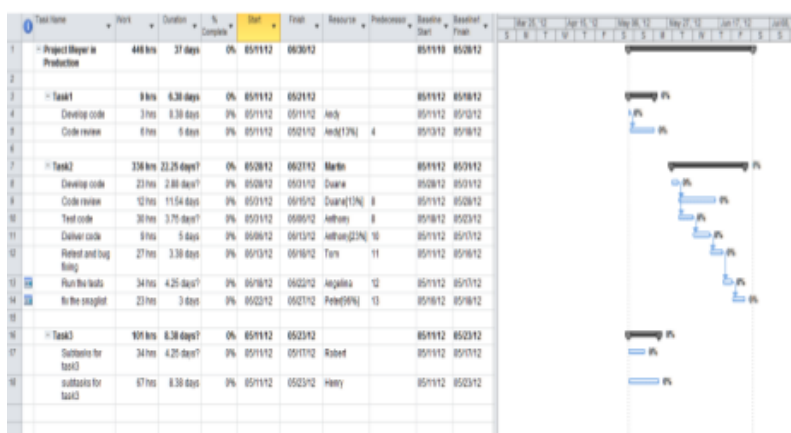
Why is Resource Allocation Important?

- * Resources are scarce
- * Best Practices
 - ✓ Anticipate risks based on resources
 - Personnel out due to vacation
 - Equipment not available
 - ✓ Gain support of functional managers, team
 - ✓ Do not allocate more than 80 percent of a resource's time
 - ✓ Keep long-term project pipeline in mind

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Project Schedule



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Project Schedule Best Practices

* Best Practices

- ✓ Only one task without predecessor (start) and successor (finish)
- ✓ Baseline the schedule
- ✓ All tasks should have a work hours value

* Pitfalls

- ✓ Overly optimistic estimates
- ✓ Using scheduling software without proper training
- ✓ Abandoning schedule during execution

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Communication Plan



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What is in a Communication Plan

- * Information (what)
- * Time period/frequency (when)
- * The need (why)
- * The senders and receivers (who)
- * The place (where)
- * The mode/technology (how)



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Why is the Communication Plan Important?

- * Keep stakeholders and project team informed
- * Establish project leadership
- * Help manage complexity
- * Best Practices
 - ✓ Use $(n*(n-1))/2$ to measure communication channels
 - ✓ Reassess and update regularly
 - ✓ Make sure everyone is included



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Risk Register



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Why is the Risk Register Important?

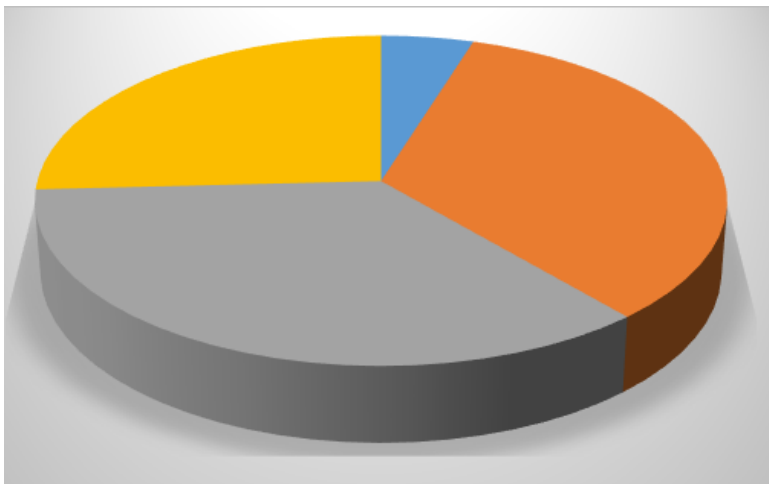
- * Identify threats and opportunities
- * Identify plan to manage the risks
- * Establish contingency reserve

- * Best Practices
 - ✓ Update early and often
 - ✓ Involve others in risk management
 - ✓ Communicate the updates

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Performance Reporting



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Why is Performance Reporting Important?

- * Measure project status
 - ✓ Metrics (variances—planned vs. actual)
- * Regular update of project status
- * Best Practices
 - ✓ Report regularly
 - ✓ Assess what stakeholders want

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More Learning Opportunities From RefineM

- * **PMP Exam Prep Course – Starts Apr 11, 2014 – 35 Hours/PDUs**
 - ✓ Instructor led virtual course, 8 sessions (4 hours every Friday)
 - ✓ Includes a full length mock test, and tips & tricks to pass the exam
- * **Art & Science of Project Management – On Apr 30, 2014 – 7 PDUs**
 - ✓ 1-day class delivered in person, from 8:30am-4:30pm CT
 - ✓ Venue – eFactory, 405 N Jefferson Ave, Springfield, MO, USA
- * **8 Powerful PM Processes – On May 14-15, 2014 – 7 PDUs**
 - ✓ Instructor led virtual course, 2 sessions of 4 hours each
 - ✓ Learn more about simple processes to achieve high-level project results
- * **Risk Management for Projects – On Jun 18, 2014 – 7 PDUs**
 - ✓ 1-day class delivered in person, from 8:30am-4:30pm CT
 - ✓ Venue – eFactory, 405 N Jefferson Ave, Springfield, MO, USA



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

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May Lunch and Learn

- * ***Risk Contingency Reserve: How to Develop and Use.***
 - ✓ What is a contingency reserve? Is it same as management reserve?
 - ✓ Why do you need one?
 - ✓ How to develop and use it?
 - ✓ How to communicate it?
- * ***Wednesday, May 7, 12:00-1:00 PM CST***

Register Today - Don't wait for the last Minute



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How to Claim 1 PDU for this Webinar?

- * PDU Category – B, Continuing Education
- * Program Title – Webinar on “8 Powerful PM Processes You Don’t Want to Skip”
- * 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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Questions?



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