Project Management Tools and Techniques

An Introductory Course in Project management Foundations

Training to capstone faculty by Skill Right Sponsored by Texas Instruments, Inc.
Minor modifications by Nayda Santiago
What Is Project Management?

“Project management is the application of **knowledge, skills, tools, and techniques** to project activities in order to **meet or exceed stakeholder needs and expectations**.”

Source: Project Management Institute
Benefits of Project Management

- Enables completion of projects in the shortest time possible while balancing cost and quality
- Enhances staffing flexibility and can help accomplish more work with fewer resources
- Provides timely information to multiple levels of the organization in consistent formats
- Enhances decision making based on facts and project information
- Enhances ability to achieve business objectives and goals
What Is a Project?

“A project is a temporary endeavor undertaken to create a unique product or service.”

Source: PMI
Project Characteristics

- Has a goal/meets a need
- Is a set of related activities that are non-recurring
- Has a definite beginning and end
- Has clearly defined goals and deliverables
- Consumes resources
- Needs to be managed
Project Manager

“The person who is responsible for the project and will be held accountable for its success or failure.”
The Triple Constraint

Project Scope

Cost

Quality

Within Available Resources

Schedule
Balancing the “Project Success Triangle”

- A clear understanding of customer priorities
- “People” skills
- Thorough planning
- An organized, structured process
To help guide you through the process you need a roadmap of some type ...
Roadmap to Project Management Success

Form Project Team
- Purpose
- Project Background
- Project Deliverables

Break Timer
Share Lessons Learned
Evaluate Success
Conduct Close-Out Meeting

Statement of Work
Work Breakdown Structure
Responsibility Matrix
Network
Gantt
Resource Plan
Budget

RAASSR
Network
Gantt
Budget

LEADERSHIP
COMMUNICATION
TIME

OPEN
PLAN
PROJECT NOTEBOOK
MEETINGS
IMPLEMENT
CLOSE-OUT

LESSONS LEARNED
REPORTS

PERFORM TASKS
Track Progress
Manage Change

Update Plan
Resolve Issues

Form Project Team

Conduct Close-Out Meeting

Share Lessons Learned

Evaluate Success
Goals of the Project Management Roadmap

- Meet customer expectations.
- Work within organizational constraints.
- Continuously improve the process.
- Control the cost of **Change**
The Cost of Change

Project Completion

Implementation

Design

Definition

Concept

Cost of Change Project Phases
Project Stakeholders

What is a project stakeholder?

If you can gain or lose from the success or failure of a project, you have a “stake” in the project.
Key Project Stakeholders

- Customer/client
- Project sponsor
- Project manager
- Project team
Project Manager

- Define and manage customer expectations.
- Coordinate development of the project plan.
- Monitor and control project work according to the approved plan.
- Communicate project status by preparing status reports and conducting progress review meetings.
- Establish and follow a change management process.
- Lead the project team and resolve conflicts between team members.
- Maintain the project notebook.
- Conducting project close-out activities.
Project Manager Skills

- Leadership
- Communications
- Organizing
- Negotiating
- Managing conflict
- Motivating
- Controlling
- Team building
- Planning
- Directing
- Problem solving
- Coaching
- Delegating
- Supporting

The skill set for a good general manager!!
Project Team Members

- Identify work tasks
- Estimate the duration of work tasks
- Help prepare the project network diagram
- Honestly report work status
- Keep the project manager informed on project issues
- Attend scheduled progress review meetings
- Raise issues important to the project’s success
- Keep their functional managers updated
- Participate in the project close-out
The Project Team

How are project teams formed?
Careful selection process?

Team selection and the strength of the team depends on the company’s type of Project Organization!

Luck of the draw?
Organizational Breakdown Structure (OBS)

- Project Manager
  - Civil Engineering
  - Electrical Engineering
  - HVAC Design
  - Project Administration
Why Plan?

“The nicest thing about not planning is that failure comes as a complete surprise and is not preceded by a period of worry and depression.”

John Preston, Boston College
Project Plan Contents

- Statement of work (SOW)
- Work breakdown structures (WBS)
- Responsibility assignment matrices
- Project schedule
- Resource plans/histograms
- Budget
- Risk management plan
- Communications plan
- Quality plan
- Verification and validation plan
Project Plan Benefits

- Provides an effective communication tool to ensure understanding of project goals and the means to achieve them
- Defines outcomes and commitments
- Establishes guidelines and standards
- Establishes the baseline for evaluating and reporting progress
- Forms the basis for scope control and change management
Project Notebook

- **Project Pre-plan**
  - Background information
  - Customer data
  - Third-party data (vendors, suppliers, etc.)

- **Project Plan**
  - Statement of Work (SOW)
  - Work Breakdown Structure (WBS)
  - Organization/responsibility charts
  - Schedule data
  - Budget/capital plan
  - Risk management

- **Project Implementation**
  - Meetings (agenda/minutes)
  - Team/management/customer/third party progress reports
  - Customer change requests/decision matrix issue resolution forms/reports

- **Project Close-out**
  - Final evaluation of measurable success indicators
  - Close-out meeting (agenda/minutes)
  - Final project report
  - Reference letters
  - Lessons learned

- **Project Administration**
  - Contractual documents
  - Invoices
  - Expenses
  - Correspondence
  - Contact log
Statement of Work — Purpose

- Define the scope of the project
- Establish customer expectations
- Serve as a “contract” if necessary
A Good SOW will answer …

- What is the purpose or goal of the project?
- Why is the project being done?
- Who is the initial customer?
- Who is the end user or final customer?
- What are the customer deliverables?
- What technical support is required for the deliverables?
And continue to answer …

- What is the budget?
- What is the final date for the deliverables?
- What are the measurable success indicators (metrics)?
- What kind of support is required from the customer?
- What contingency plans are in place?
SOW — Generic Contents

- Customer
- Project
- Title
- Purpose
- Background
- Deliverables
- Measurable success indicators
- Customer support
- Risk plans
# Statement of Work

**STATEMENT OF WORK**

<table>
<thead>
<tr>
<th>Date:</th>
<th>Form completion date</th>
<th>Immediate Customer: Person or organization requesting the work</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>People who helped write the statement of work</td>
<td>Final End User: Person or organization who will use the results of the project</td>
</tr>
</tbody>
</table>

## PROJECT TITLE:
The project title should be a short, concise statement that defines the project.

## PURPOSE:
The purpose of the project is the goal; why you are doing the project. This should be clearly stated.
PROJECT BACKGROUND:

The project background should contain information pertaining to the history of the project. It also includes a statement that justifies the project.

- For a first draft, brief statements are acceptable. Formal statements of work are usually in paragraph form.
- Supply information that explains the philosophy behind the project. Also describe what makes the project unique/special.
- This information can be used later to:
  - Leverage resources
  - Gain support from external organizations/departments
  - Accommodate management directives
  - Accommodate changes

Many of the statements made in the background section must be substantiated in the measurable success indicators section of the statement of work.

The project background includes the following key elements:

- History
- Justification
- Consequences
- Uniqueness of project

Some examples on the type of information to include in the project background section include:

- Meet safety requirements
- Support business plan
- Meet quality requirements
- Meet customer expectations
- Improve performance/efficiency
DELIVERABLES:

Deliverables are the outputs of the project. They are what is promised to the customer.

- Deliverables are written as nouns. They are things.
- Quantities must be identified in this section.
- Include the major elements of the deliverables.

It is important to be very clear in the deliverables section. Misinterpretation of project deliverables can establish incorrect customer expectations.

The following are examples of deliverables:

- Parts
- Prototypes
- Procedures
- Equipment
- Installation of equipment
- Written reports
- Test results
- Training
- Specifications
- Technical drawings
- Plans
MEASURABLE SUCCESS INDICATORS:

Measurable success indicators include concise, measurable, information that will be used to determine if a project was successful. Measurable success indicators must substantiate any statements made in the background section.

Include what is known about quality, cost, and schedule expectations.

Examples of measurable success indicators include:
- Complete project in three months
- Reduce mass by 30%
- Complete ROI for initial expenditure by Nov. 30, 20xx
- Achieved $1.00 reduction in piece cost
- Demonstrate meeting of EPA Standard # xxxx
- New process will require two fewer operators
- Stay within budget of $275,000.00

Two specific measurable success indicators which are most important in terms of seeing the “big picture” of a project are:
- Overall schedule
- Budget

It’s also important to note any key milestone dates that have been established.

“SMART” is an acronym used to help write good measurable success indicators for a project. The words which comprise the acronym SMART are:
- Specific
- Measurable
- Agreed upon
- Realistic
- Time (cost) framed
Smart Measurable Success Indicators (SMART)

- **S** - Specific
- **M** - Measurable
- **A** - Agreed upon
- **R** - Realistic
- **T** - Time and cost framed
**CUSTOMER SUPPORT:**

The customer support area provides a means to list the items and services that must be provided by the customer/sponsor to ensure the success of the project. Examples include:

- Drawings
- Subject matter experts
- Equipment

**PROJECT RISK PLANS:**

The last section of the statement of work is the risk plan. Risk plans consider the possibility of an event occurring that would drastically alter the schedule, budget, or quality of the project.

- Identify what is likely to go wrong, and also what can have the most impact.
- Ask “What can go wrong?” “How will I handle it?”
- Put your statements in “If ________, then ________.” format

Examples of risk plans are:

- If a labor strike occurs, then outsource production.
- If supplier cannot ship materials in time, then contact another vendor.
- If design freeze date is not maintained, then use current product design.
Exercise

Prepare a Statement of Work
Work Breakdown Structure—Purpose

- Identify all of the work that needs to be done to complete the project.
- Structure the work into logical components and subcomponents.
- Define the work to a level of detail so individual responsibilities can be assigned.
- Summarize and report project data.
### Representative Work Breakdown Structure

<table>
<thead>
<tr>
<th>Level I</th>
<th>(Noun)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level II</td>
<td>(Noun)</td>
</tr>
<tr>
<td>Level III</td>
<td>(Action Verbs)</td>
</tr>
<tr>
<td>Level IV</td>
<td>(Action Verbs)</td>
</tr>
</tbody>
</table>

#### Example Breakdown

- **Title**: Project Management
- **Deliverable**: Function
- **Phase**: Chunk of Work
- **Activity**: Task (Work Package)

---

<table>
<thead>
<tr>
<th>TASK (WORK PACKAGE)</th>
<th>TASK (WORK PACKAGE)</th>
</tr>
</thead>
</table>
Automotive WBS

Building a Car
- Chassis
- Body
- Powertrain
  - Engine
  - Transmission
- Electrical
- Block
- Pistons
- Oil Pan
  - Design
  - Build
  - Test

Work Packages

Level 1
Level 2
Level 3
Level 4
Level 5
WBS Work Package – Level of Detail

- **WHO** will be the responsible individual or organization?
- How much **TIME** will the activity take?
- What **COST** is associated with accomplishing the activity?
- Can **PROGRESS** be tracked easily?
WBS — Outlining Approach

I. Main Project Deliverable  
   A. Major Element  
      1. Activity  
      2. Activity  
         a. task  
         b. task  
         c. task  
      3. Activity  
   B. Major Element  
      1. Activity  
      2. Activity  

The outline approach is used by Microsoft® Project®
Exercise

Create a WBS
Roadmap to Project Management Success

Responsibility Matrix

Form Project Team
Conduct Close-Out Meeting
Share Lessons Learned
Evaluate Success

Perform Tasks
Track Progress
Update Plan
Resolve Issues
Manage Change

Budget

Plan
Execute
Control
Close-Out

Leadership
Communication

Project Background
Purpose
Project Deliverables
Work Breakdown Structure
Statement of Work

Network
Gantt
Resource Plan
Responsibility Assignment Matrix (RAM) — Purpose

- Ensure that all tasks are assigned to people
- Show levels of involvement of people to work
## Responsibility Assignment Matrix

**RASIC Method**

<table>
<thead>
<tr>
<th>Activity</th>
<th>Project Manager</th>
<th>Customer</th>
<th>Team Member</th>
<th>Senior Management</th>
<th>Support Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify Potential Market</td>
<td>C</td>
<td></td>
<td>S</td>
<td>R</td>
<td></td>
</tr>
<tr>
<td>Identify Survey Population</td>
<td>C</td>
<td>R</td>
<td>S</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Develop Survey</td>
<td>R</td>
<td>I</td>
<td>S</td>
<td>I</td>
<td></td>
</tr>
<tr>
<td>Test Survey on Sample</td>
<td>R</td>
<td>I</td>
<td>S</td>
<td>S</td>
<td></td>
</tr>
<tr>
<td>Finalize Survey</td>
<td>R</td>
<td>A</td>
<td>S</td>
<td>I</td>
<td>S</td>
</tr>
<tr>
<td>Conduct Survey</td>
<td>R</td>
<td>I</td>
<td>S</td>
<td>I</td>
<td>S</td>
</tr>
<tr>
<td>Collect Survey</td>
<td>R</td>
<td>I</td>
<td>S</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Analyze Data</td>
<td></td>
<td></td>
<td></td>
<td>R/S</td>
<td>I</td>
</tr>
<tr>
<td>Report Results and Suggestion</td>
<td>R</td>
<td>A</td>
<td>S</td>
<td>A</td>
<td>S</td>
</tr>
</tbody>
</table>

**Legend**

- R - Responsible
- A - Approve
- S - Support (Does the Work)
- I - Inform
- C - Consult
RASIC Coding System

- **R = Responsible**
  - Ensures that the assigned work is completed, responsible for the delivery.

- **A = Approve**
  - Approves that the work meets all requirements.

- **S = Support**
  - Does the work. Committed to its completion

- **I = Inform**
  - Is kept informed of work status, no decision making

- **C = Consult**
  - Is consulted on the work. Provides input.
Roadmap to Project Management Success

- Form Project Team
- Work Breakdown Structure
- Responsibility Matrix
- Network
- Gantt
- Resource Plan
- Budget
- Perform Tasks
- Track Progress
- Manage Change
- Update Plan
- Resolve Issues
- Network
- Gantt
- Leadership
- Communication
- PR
- LEADERSHIP
- COMMUNICATION
- LESSONS LEARNED
- IMPLEMENT
- CLOSE-OUT
- Share Lessons Learned
- Evaluate Success
- Conduct Close-Out Meeting
- Roadmap to Project Management Success
Project Schedule — Purpose

- Determine if requested completion date is possible.
- Identify start and completion dates of all work.
- Determine the controlling sequence of activities.
- Provide data for resource allocation.
- Track progress by providing a baseline.
Scheduling

**Step 1:** Estimate Activity Durations

**Step 2:** Determine Activity Sequence By Creating a Network Diagram

**Step 3:** Calculate the Schedule Using Critical Path Method (CPM) Procedures

**Step 4:** Show the Schedule by Drawing Gantt and/or Milestone Charts
Estimate activity duration

- Expert judgment
  - Individuals who have performed similar activities.
- Analogous estimating
  - Use similar projects to estimate this one.
- Three point estimate (PERT – project evaluation and review technique)

\[
\text{estimate} = \frac{\text{pessimistic} + (4 \text{ times realistic}) + \text{optimistic}}{6}
\]
WBS/Network Diagram Linkage
Network Diagram Methods

Arrow Diagram Method

Precedence Diagram Method
Precedence Diagram Method

Activity

Logic Connection

A → B → E
A → C → D → H → I → J
A → C → G → I → J
A → C → D → H → I

Break Timer
What’s is the Critical Path?

- Path with least slack
- Path with longest duration
- **Critical Path Method** is a project management technique that analyzes what activities have the least amount of scheduling flexibility (i.e., are the most mission-critical) and then predicts project duration schedule based on the activities that fall along the “critical path.”
  - Activities that lie along the critical path cannot be delayed without delaying the finish time for the entire project.
Enhanced Gantt Chart

- Critical
- Non-Critical
- Slack/Float
Project X — Gantt Chart Solution

<table>
<thead>
<tr>
<th>Activity</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>2</td>
</tr>
<tr>
<td>B</td>
<td>1</td>
</tr>
<tr>
<td>C</td>
<td>3</td>
</tr>
<tr>
<td>D</td>
<td>1</td>
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<tr>
<td>E</td>
<td>4</td>
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<td>F</td>
<td>3</td>
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<td>2</td>
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<tr>
<td>H</td>
<td>1</td>
</tr>
<tr>
<td>I</td>
<td>2</td>
</tr>
<tr>
<td>J</td>
<td>1</td>
</tr>
</tbody>
</table>

- Critical
- Non-Critical
- Slack/Float
Exercise

- Prepare a project schedule for your project.
Assigning Resources

A schedule is not complete until all the resources necessary to complete the project have been committed or assigned.
Factors to Consider

- Availability of other resources
- Depletion of available float time
- Impact on critical path
- Impact on budget
Non-Labor Resources

- Lab time
- Facilities
- Prototype parts/systems
- Equipment
- Materials
Roadmap to Project Management Success

- Form Project Team
- Conduct Close-Out Meeting
- Share Lessons Learned
- Evaluate Success
- Statement of Work
- Work Breakdown Structure
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- Budget
- LEADERSHIP
- COMMUNICATION
- PLAN
- IMPLEMENT
- CLOSE-OUT
- PROJECT NOTEBOOK
- REPEAT
Estimating costs

- The costs of a project are derived from the WBS, schedule, resources, and risks.
- Include
  - Labor
  - Equipment—remember S/H
  - Supplies —remember S/H
  - Materials—remember S/H
  - Travel
  - Training
  - Overhead
  - Contingency plan

Source: PMI
Roadmap to Project Management Success

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- Update Plan
- Resolve Issues
- Manage Change
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- E
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What Is Risk?

Risk can be defined as:

“Any threat to project success.”
Risk Management

“Risk Management is the art and science of identifying, analyzing and responding to risk factors throughout the life of the project and in the best interests of its objectives.”

Source: PMI
Risk Plan Development

- Risk Identification
- Risk Monitoring
- Risk Quantification
- Response Development
Prioritizing & Planning

**PRIORITY 1 RISKS**
(High Probability)
(High Impact)
Proactive and Reactive Measures

**PRIORITY 2 RISKS**
(Low Probability)
(High Impact)
Reactive Measures

**PRIORITY 3 RISKS**
(Low Probability)
(Low Impact)
Monitor Only

Probability of Occurrence

- 100%
- 50%
- 0%

Negative Impact on Scope/Quality/Cost/Schedule
(Risk Event Value)

Low
Medium
High
End of Planning Phase
Project Implementation
Roadmap to Project Management Success

- Form Project Team
- Conduct Close-Out Meeting
- Share Lessons Learned
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- Break Timer
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- LEADERSHIP
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- TIME
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Implementation Model

- **Step 1**: Perform Tasks
- **Step 2**: Track Progress
- **Step 3**: Manage Change
- **Step 4**: Update the Plan

Resolve Issues
Roadmap to Project Management Success

- Form Project Team
- Statement of Work
- Work Breakdown Structure
- Responsibility Matrix
- Network
- Gantt
- Resource
- Budget
- Conduct Close-Out Meeting
- Share Lessons Learned
- Evaluate Success
- LEADERSHIP
- COMMUNICATION
- Project Notebook
- Meetings
- Reports
- Perform Tasks
- Track Progress
- Resolve Issues
- Manage Change
- Implement
- Close-Out

Tasks:
- Perform
- Tasks
Reporting Project Progress

- Progress review meeting
- Project reports
Project Progress Review Meetings

- Review of action items from last meeting
- Update on activities and schedule
- Problem identification and corrective action planned
- Review of issues (closed, open, new)
- Change request status
- Risk status
- Plan for next period
Roadmap to Project Management Success
Project Tracking and Control

Step 1
Perform Tasks

Step 2
Track Progress

Step 3
Manage Change

Step 4
Update the Plan

Resolve
Issues
Compare Progress to Plan

- Quality reviews
- Gantt schedule performance charts
- Cost performance charts
## Cost Performance

<table>
<thead>
<tr>
<th>Week</th>
<th>Planned Value</th>
<th>Actual Costs</th>
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<tbody>
<tr>
<td>1</td>
<td>$3,000</td>
<td>$8,000</td>
</tr>
<tr>
<td>2</td>
<td>$6,000</td>
<td>$16,000</td>
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<tr>
<td>3</td>
<td>$18,000</td>
<td>$30,000</td>
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<tr>
<td>4</td>
<td>$30,000</td>
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<td>9</td>
<td>$83,000</td>
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<tr>
<td>10</td>
<td>$89,000</td>
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</tbody>
</table>
Roadmap to Project Management Success

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LEADERSHIP
COMMUNICATION
LESSONS LEARNED
IMPLEMENT
CLOSE-OUT

Perform Tasks
Track Progress
Manage Change

Manage Change

Conduct Close-Out Meeting
Share Lessons Learned
Evaluate Success

Leadership
Communication
Lessons Learned
Implement
Close-Out

Manage Change
Managing Project Change

- Step 1: Perform Tasks
- Step 2: Track Progress
- Step 3: Manage Change
- Step 4: Update the Plan

Resolve Issues
Categories of Change

- Customer requested
  - Typically the largest source of change
- All others
  - Internal company requests
  - Government regulation
  - Team members
Addressing Project Changes

- Call a team meeting.
- Explain what the change is.
- Obtain feedback from team members.
- Identify alternative corrective options.
- Prepare a decision matrix.
- Select a recommended option(s).
- Present information to upper management/customer.
- Implement the approved course of action.
Roadmap to Project Management Success

- **Form Project Team**
- **Statement of Work**
- **Work Breakdown Structure**
- **Responsibility Matrix**
- **Network**
- **Gantt**
- **Resource Plan**
- **Budget**

**LEADERSHIP**

**COMMUNICATION**

**RESOLVE ISSUES**

**TIME**

**PR O J E T NOTEBOOK**

**CLOSE-OUT**

- **Conduct Close-Out Meeting**
- **Resolve Issues**
- **LESIONS LEARNED**
- **Evaluate Success**
- **Share Lessons Learned**
- **Resource Plan Update**
- **Manage Change**
- **Track Progress**
- **Perform Tasks**
Issue Resolution

- Disagreements that should be ...
  - Documented
  - Assigned
  - Scheduled
  - Tracked
  - Escalated
  - Resolved
Roadmap to Project Management Success

- Form Project Team
- Statement of Work
- Work Breakdown Structure
- Responsibility Matrix
- Network
- Gantt
- Resource Plan
- Budget
- Conduct Close-Out Meeting
- Share Lessons Learned
- Evaluate Success
- LEADERSHIP COMMUNICATION
- TIME
- Plan
- Project Notebook
- Meetings
- Reports
- Lessons Learned
- Implement
- Close-Out
- Update Plan
- Perform Tasks
- Track Progress
- Manage Change
- Resource Plan
- Gantt Budget
- Network
- Responsibility Matrix
- Work Breakdown Structure
- Statement of Work
- Form Project Team
Plan Updates

- Step 1: Perform Tasks
- Step 2: Track Progress
- Step 3: Manage Change
- Step 4: Update the Plan
Closeout
Roadmap to Project Management Success

- Form Project Team
- Conduct Close-Out Meeting
- Share Lessons Learned
- Evaluate Success
- Break Timer
- Statement of Work
- Work Breakdown Structure
- Responsibility Matrix
- Network
- Gantt
- Resource Plan
- Budget
- LEADERSHIP
- COMMUNICATION
- PLAN
- IMPLEMENT
- CLOSE-OUT
- PROJECT NOTEBOOK
- MEETINGS
- REPORTS
- LESSONS LEARNED

Tasks and Processes:
- Purpose
- Project Background
- Project Deliverables
- Network
- Gantt
- Resource Plan
- Budget
- Perform Tasks
- Track Progress
- Manage Change
- Update Plan
- Resolve Issues
- Manage Change
Project Manager’s Role During Project Close-Out

- Ensure that all project deliverables have been completed and formally accepted by the customer.
- Determine if the measurable success indicators were achieved.
- Conduct project close-out meetings, both internal and external.
- Write the final project report.
- Document and share lessons learned.
Roadmap to Project Management Success

- Form Project Team
- Statement of Work
- Work Breakdown Structure
- Responsibility Matrix
- Network
- Gantt
- Resource Plan
- Budget

- LEADERSHIP
- COMMUNICATION

- PLAN
- MEETINGS
- REPORTS

- IMPLEMENT
- LESSONS LEARNED
- CLOSE-OUT

- Perform Tasks
- Track Progress
- Manage Change
- Update Plan
- Resolve Issues

- Evaluate Success
- Manage Change
- Evaluate Success
- Lessons Learned

- TIME
- $
Evaluating Project Success

- Project purpose
- Deliverables
- Measurable success indicators
  - Quality
  - Schedule
  - Cost
Roadmap to Project Management Success

- Conduct Close-Out Meeting
- Share Lessons Learned
- Evaluate Success
- Evaluate Success
- Conduct Close-Out Meeting
- Form Project Team
- Statement of Work
- Work Breakdown Structure
- Responsibility Matrix
- Network
- Gantt
- Resource Plan
- Budget
- Perform Tasks
- Track Progress
- Manage Change
- Update Plan
- Resolve Issues
- LEADERSHIP
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- Conduct Close-Out Meeting
Informal Project Team Close-Out Meeting

- Brainstorm to identify what went right with the project.
- Brainstorm to identify what went wrong with the project.
- List ideas for improvements.
- List ideas for ensuring that what went right happens again.
- Recognize the accomplishments of individuals.
Close-Out Meeting Agenda

- Review project statement of work.
- Review actual deliverables and show how project met its measurable success indicators.
- Summarize what was done well.
- Identify areas for improvement.
- Request recommendations for improvement.
- Determine if any additional tasks are required to complete the project.
Close-Out Meeting Agenda (continued)

- List additional tasks, responsible persons, and due date.
- Document lessons learned for the project notebook.
- Discuss the project notebook availability to appropriate personnel for future projects.
- Evaluate subcontractor performance.
Roadmap to Project Management Success

- Form Project Team
- Statement of Work
- Work Breakdown Structure
- Responsibility Matrix
- Network
- Gantt
- Resource Plan
- Budget
- Purpose
- Project Background
- Project Deliverables
- Leadership
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- Share Lessons Learned
- Conduct Close-Out Meeting
- Share Lessons Learned
Sharing Lessons Learned

- Lessons Learned Database
  - Categorized electronic project information database

- Continuous Improvement Recommendations
  - Project Management Process
  - Forms
  - Standards
Thank You!!!!