



“PM-101 for Non-Project Managers”

May 31, 2018

FMI Professional Development Day, Ottawa

WELCOME AND INTRODUCTIONS

Welcome and Introduction

Instructors Today

Jennifer Read, PMP, CMC, PEng, PRINCE2

- 16 years of Military experience.
- 16 years experience as private consultant
 - Held many Project Management and Management Consulting roles within Federal Government depts including setting up PMOs, and PM Governance.
- Currently President of PMI OVOC



Welcome and Introduction

Instructors Today



Pete Grieve, PMP

- Worked in most aspects of Software System Development Life Cycle: Dev, BA, Manager of BAs & QAs, Project Mgr, Product Mgr, Engagement Mgr, People Management, and Procurement.
- Has worked both in private and public sectors within banking, insurance, retail, e-commerce, and e-tourism industries.
- Currently on the Board of Directors for PMI OVOC as VP Programs responsible for ongoing professional development education/seminars and the annual Symposium.

“Charlie LaChicken”

Introductions



- Mascot of PMI OVOC training sessions.
- Speciality is Time Management.

Proposed Agenda

- Some common PM terms thrown about so you can understand the jargon !!
- Taking an idea through the Project Life-cycle or major project phases.

Phase	Task Items
Project Initiating	Business Case, Project Charter
Project Planning	Project Plan
Project Execution	Analysis, Development, Testing – Repeat.
Monitoring and Controlling	Quality checks, Change Requests handled, Reporting against Baselines
Project Closing	Release the Resources, final deliverables, Lessons Learned

Proposed Agenda(continued)

- Use of a Case Study that we build on
- Demystifying the PM role and world
- How you could find yourself working on a project as a SME
- Answer any questions
- Most of all Fun !!
- End of Day Q&A
- If interested, further info on the PMI OVOC chapter

PM JARGON

Common PM Jargon

- What Is a Project Manager?
 - Assigned person responsible for ensuring a project's success to create and monitor project's progress, scope, schedule, costs, risks, resources, etc?
 - PMs are not industry specific – you can find them in business functions such as marketing or finance; or technical such as software development, or construction. Can be within education or medical profession, etc.
 - My background is software development and I feel that many of you may be involved with software projects – so many of today's examples will be oriented in that area.

Common PM Jargon

- **Project Management**

- Temporary in nature – with a defined start and end.
- Example: Building a bridge; or Implementing a new Financial Reporting tool

v.s.

- **Program Management**

- Related bundle of projects or operations within the same “theme” or defined grouping.

v.s.

- **Portfolio Management**

- Unrelated bundle of projects or operations within a defined grouping.

Common PM Jargon

- Operations Management

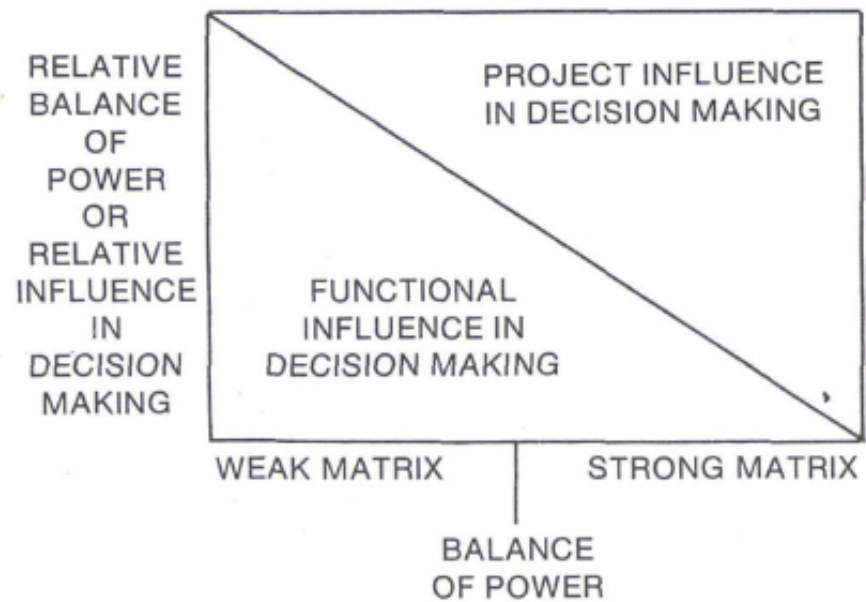
- Usually follows a product or solution implementation. Solution is moved from Development Team to an Operations Team that handle on-going support.

-

- **“Power” and Influence of the PM**

- Depends on the organization structure
 - Matrix model –
 - “Weak Matrix” resources assigned to Project but Resources still report to a Functional Manager.

Common PM Jargon



Common PM Jargon

- **SDLC**
 - “System Development Life Cycle” – used commonly in software development. Means from the **start** of the project (Initiating phase) to **end** of the project (Closing the project and Lessons Learned).
- **Scope**: The agreed upon tasks or business functionality to be delivered. (**Scope Creep**)
- **PMO**: Project Management Office. Usually a team within I.T. that determines the project documentation and processes that must be followed.

Common PM Jargon

- Role of BA (Business Analyst) v.s. PM
 - Act as a intermediary between Business and I.T.
 - Can help explain “the other side” and speak both languages.



Common PM Jargon

- **Role of BA (Business Analyst) v.s. PM**
 - Defender of the Business needs – “voice of the customer” during the DEV phase.
 - Both BA and PM customer-facing – must work together as a collective front.
 - Depending on Organization: BA may be in I.T. or as part of the Business – regardless role is the same.

Common PM Jargon

- **Waterfall / Traditional Development**

- Full Requirements done upfront and signed off before any Development is done.
- Pros: Full understanding of complex requirements become known and development effort can be properly estimated.
- Cons:
 - In larger projects this Planning phase can be extremely long. Resources or Stakeholders can change through-out planning and cause changes. “I didn’t want this?”
 - Business doesn’t see any value for months or even years.
 - Technology or business changes can occur during development phase and the Business Analysts have been re-assigned

Common PM Jargon

- Waterfall / Traditional Development

Project: ABC																																						
	June, 2018				July, 2018				August, 2018					Sept, 2018				Oct. 2018				Nov, 2018				Dec, 2018												
Task	8	15	22	29	6	13	20	27	3	10	17	24	31	7	14	21	28	5	12	19	26	2	9	16	23	30	7	14	21	28								
Phase1: Planning/Requirements	█																																					
Phase 2: Development														█																								
Phase 3: QA Testing																																						
Phase 4: User Acceptance Testing																																						
Phase 5: Implementation																																						

Common PM Jargon

- Agile Development / Scrum

- Smaller packages of work are worked in “sprints” and delivered sooner.
- Thought to show progress to Stakeholders, keep parties engaged.
- Keeps the project on the everyone’s mind and radar.

- Daily Scrums

- 15 to 20 minute stand-up meetings to talk about:
 - 1) what do you plan to accomplish today
 - 2) is there anything you need in the short-term (next day or two)

Common PM Jargon

- Agile Development / Scrum Schedule

Task	June, 2018				July, 2018				August, 2018				
	8	15	22	29	6	13	20	27	3	10	17	24	31
Sprint 0													
BA/Fin SME (Requirements for Sprint 1)	█	█											
Sprint 1													
BA and Fin SME (Req for Sprint 2)					█	█							
BA and Fin SME (support for Sprint 1 DEV)			█										
Dev			█	█									
QA (Test cases and testing)			█	█									
Client UAT and defect logging					█								
Sprint 2													
BA and Fin SME (Req for Sprint 3)							█	█					
BA and Fin SME (support for Sprint 2 DEV)					█								
Dev					█	█							
Dev - agreed fixes from Sprint 1						█							
QA (Test cases and testing - Sprint 2)						█	█						
QA (re-testing Sprint 1 fixes and Regression testing)						█							
Client UAT and defect logging (Sprint 2 + defects from S1)								█					
Release into Production								M					

Introduction to the Case Study

- We all work for “World-wide Plastics (WWP)”, a multi-national plastics conglomerate with offices in Canada, U.S., Denmark, and Ireland.
- We manufacture environmentally-friendly and easily biodegradable plastics such as moving containers, product containers, and even developing R&R for houses and shelters.
- We create quality products – we are not the cheapest in the marketplace.
- “WWP” has grown into the largest plastics manufacturer in the world because of the parent company purchasing its competition aggressively over the last 7 years, and plans to continue to do so !!! Our goal - World domination of plastics !!

Introduction to the Case Study

- Our CEO and President, Dr. Penny Moneybags, has expressed frustration that 4 of the 5 companies acquired over the last 7 years are under different Financial Systems. Thus she cannot see a clear complete financial picture of WWP until the 3rd day of each calendar month and then it is out of date soon after.
- “Dr. Penny”, as she likes to be called, has issued a mandate that within the next 2 years we must move to 1 Financial system/platform and all Divisions will migrate over to this one.
- She has allocated \$500K to define the criteria and select the most flexible and powerful Financial system to meet our on-going business needs. And we have all been assigned to this Planning portion of the project.

Project Lifecycle

- Starting the Project (Initiation)
- Organizing and Preparing (Planning)
- Carrying Out the Work (Execution)
- Ending the Project (Close-Out)

Process Groups

- **Initiating** – Those processes performed to define a new project or a new phase of an existing project by obtaining authorization to start the project or phase
- **Planning** – Those processes required to establish the scope of a project, refine the objectives, and define the course of action required to attain the objectives that the project was undertaken to achieve
- **Executing** – Those processes performed to complete the work defined in the project management plan to satisfy the project requirements

Process Groups

- **Monitoring and Controlling** – Those processes required to track, review and regulate the progress and performance of the project; identify any areas in which changes to the plan are required; and initiate the corresponding changes
- **Closing** – Those processes performed to formally complete or close the project, phase or contract

Knowledge Areas

- Integration Management
 - Includes the processes and activities to identify, define, combine, unify, and coordinate the various processes and project management activities within the Project Management Process Groups
- Scope Management
 - Includes the processes required to ensure the project includes all the work required, and only the work required to complete the project successfully
- Schedule Management
 - Includes the processes required to manage the timely completion of the project

Knowledge Areas

- Cost Management
 - Includes the processes involved in planning, estimating, budgeting, financing, funding, managing, and controlling costs so the project can be completed within the approved budget
- Quality Management
 - Includes the process for incorporating the organization's quality process regarding planning, managing, and controlling project and product quality requirements , in order to meet stakeholder' expectations
- Resource Management
 - Includes the process to identify, acquire, and manage the resources needed for the successful completion of the project

Knowledge Areas

- Communications Management
 - Includes the processes required to ensure timely and appropriate planning, collection, creation, distribution, storage, retrieval, management, control, monitoring, and ultimate disposition of project information
- Risk Management
 - Includes the process of conducting risk management planning, identification, analysis, response planning, response implementation, and monitoring risk on a project
- Procurement Management
 - Includes the processes necessary to purchase or acquire products, services, or results needed from outside the project team

Knowledge Areas

- Stakeholder Management
 - Includes the processes required to identify the people, groups, or organizations that could impact or be impacted by the project, to analyze stakeholder expectations and their impact on the project, and to develop appropriate management strategies for effectively engaging stakeholders in project decisions and execution

PROJECT INITIATION

Birth of a Project - How Does a Project Start

- Solve some sort of Business Problem or Opportunity
 - Create a **Business Case**, once **approved and prioritized**:
 - Organizations' willingness to assign resources and funding to fix it.
 - (.....*still not a formal project yet :-)*)

“Birth” of a Project

- Using our Case Study, take 10 minutes at your tables to describe what the **Business Case** would look like?
 - **Stated Problem or Opportunity**
 - **Impact:** lost revenue? Poor information for decision-making?
 - **Initial list of people Impacted** (new term: “Stakeholders”)
 - *Stakeholder: “any user of the system, anyone impacted by the system or change”.*
 - **Project Sponsor** (new term – “Project Sponsor”)
 - *Project Sponsor: “ultimate owner of the project, usually with the full power to make decisions and whose budget the project is financed by”*

“Birth” of a Project

– Stated Problem or Opportunity:

- 4 out of 5 WPP Divisions using different Financial Management systems making it difficult to have a complete company-wide financial picture.

– Impact:

- Poor information for decision-making, complete company financial reports are only available and accurate on the 3rd day of each month. Data or Report is quickly dated.
- Extensive manual calculation or reporting needed to create that 3rd day of the month summary report. Manual processing could mean errors.

“Birth” of a Project

– Initial list of people Impacted

- *Stakeholders:*

- *Dr. Penny and the Executive Management Team*
- *All Divisions Finance/Accounting teams and Leadership teams*
- *Possibly sub-systems that feed into the individual Financial systems for each Division*
- *Suppliers, WPP Customers,*
- *Possibly Stockholders (if a public-company)*
- *.....More will be identified during deeper Analysis*

– Project Sponsor

- *Dr. Penny or her assigned representative.*

“Birth” of a Project

- **Business Case - What Happens Next?**
 - Reviewed by an Intake Committee
 - Maybe scored against criteria such:
 - as “alignment with strategic initiatives for the Organization”
 - Organization’s capacity to undertake the project.
 - Assuming this is Dr. Penny’s “pet project” it’s going to get approved !!! (Sometimes Company Politics drives these decisions)*(still not a formal project yet)*

Step 2: “Birth” of a Project

- Next Step: Project Charter created
 - Could be completed by the Sponsor or other person (maybe by a “Project Manager” although a project has not been approved yet).
 - A project charter is a statement of the scope, objectives, and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager. It serves as a reference of authority for the future of the project.
 - **When signed off by Project Sponsor we have official start of a project !!!!**

Step 2: “Birth” of a Project – Project Charter

- Take 10 minutes to discuss the various components:
 - Scope: Analysis and Product Selection (which Financial System); Converting over to chosen Financial System by all sub-companies.
 - Estimated Timelines (“Dr. Penny’s mandated 2 year period – is that realistic??)
 - Estimated Cost (and how funded?)
 - Estimated Resources – who? what? For how long?
 - Stakeholders – who is all affected?
 - Project Sponsor – “Dr. Penny”

Step 2: “Birth” of a Project – Project Charter

- Once Completed, Reviewed and Signed off – we have a bouncing 8.5 lb baby Project !!!
 - (Note: this becomes a Project Artifact, it’s sole purpose is get Project Approval. No further updates will be done to this document.)

Step 3: Project Management Plan

- ***[1st Step: Historical Data – have we done a project like this before?]***
 - What is it? A Project Management Plan (PMP) is the comprehensive “game plan” for the project. It details important aspects such as:
 1. Scope Statement
 2. Critical Success Factors
 3. Deliverables
 4. Schedule
 5. Budget
 6. Quality
- (continued....)

Step 3: Project Management Plan

- The primary components of a project management plan (continued) are:
 7. Resources Plan (Human, Equipment, Rooms)
 8. Stakeholder List and Stakeholder Management (“RACI” on next slide)
 9. Communication Management
 10. Risk Management and Risk Register (more on next slides)
 11. Procurement Plan
- Living document, will be expanded and updated through-out the duration of the project.

Stakeholder Management – RACI chart

- What Is it?
 - Definition: “A RACI chart is a matrix of all the activities or decision making authorities undertaken in an organisation set against all the people or roles. At each intersection of activity and role it is possible to assign somebody **R**esponsible, **A**ccountable, **C**onsulted or **I**nformed for that activity or decision.

Stakeholder Management – RACI chart Sample

RACI Chart (Roles and Responsibilities Matrix)

For instructions / training material visit <http://www.racichart.org>

Process Name / Description: Plant maintenance project: Repair and resurface plant parking lot during plant shutdown in July

Created On: 1-Jan-16 Revision: 3/12/16

Created by: Kelly Bradley (facilities mgr), Mike Cole (plant manager), Joe Pallino (HR), Brian Sullivan (security), Billy Ownens (project manager)

	Facilities	Plant Mgr	HR	Security	Project Mgr
Identify a minimum of three asphalt contractors from Angie's List	C	-	-	-	R
Arrange for contractor visits and quotes	I	-	-	-	R
Review quotes and references, make contractor selection	A	I	I	-	R
Review and finalize contract, lock in plant shutdown week	I	I	-	-	R
Communicate project to shutdown maintenance crew, make sure all vehicles are removed from the lot	I	I	R	I	I
Provide security gate access codes for asphalt crew by June 15	I	-	A	R	I
Oversee the project during the plant shutdown week, ensure it is completed on time	A	I	I	-	R

R = Responsible, A = Accountable, C = Consulted, I = Informed

Risk Management and Risk Register

- Risks can be ‘bad’ (threats) or ‘good’ (opportunities).
- Risks need to be recorded with “Likelihood to Occur” and “Impact if It Does Occur” along with “Action” and Owner.
- Action = Response

ID	Date raised	Risk description	Likelihood	Impact	Severity	Owner	Mitigating action	Contingent action	Progress on actions	Status
1	12/12/15	There is a risk that assets may not be completed in time to meet production schedules.	Low	High	Amber	S Scott	Agree writing days in advance, reallocate writer's other work. Agree to stagger delivery of chapters so that editing can start earlier.	Increase duration of Printing schedules & move from 4 col to 2 col.	Update 13/12/2015 mitigation actions implemented	Open

Risk Management and Risk Register



Risk Management and Risk Register

Risk Response	Description/example	Suitable for.... risk types (these are suggestions and not exhaustive)
Threats		
Avoid	The risk is avoided by changing the project in some way to bypass the risk.	Some political risks e.g. adverse public opinion. Some technical/operational/infrastructure risks e.g. maintenance problems. Legal and regulatory risks e.g. regulatory controls, licensing requirements.
Transfer	Some or all of the risk is transferred to a third party for example insurance .	Some strategic/commercial risks e.g. theft, insolvency can be insured against. See business risks for more examples. Environmental risks e.g. natural disasters, storms, flooding may also be insured against see risk insurance .
Reduce	Action is taken to reduce either the likelihood of the risk occurring or the impact that it will have.	The most frequently used response to risk. Widely applicable - Technical/Operational/Infrastructure e.g. negligence, performance failure, scope 'creep', unclear expectations. Organisational/management/human factors e.g. personality clashes, poor leadership, and poor staff selection.
Accept	The risk may be accepted perhaps because there is a low impact or likelihood. A contingency plan will be identified should it occur.	Some political, legal and regulatory, and economic/financial risks may need to be accepted with a contingency plan in place e.g. war and disorder, exchange rate fluctuation.
Contingency	Here a plan is put in place to respond if the risk is realised.	Economic/financial/market Political Legal and regulatory Arguably all risks can and should have a contingency plan in place.

Risk Management and Risk Register

- Examples: 1) Key Resource's contract may not be extended.
2) Sample below: Assets may not be completed in time to meet Production schedule.

Risk Response	Description/example	Suitable for.... risk types (these are suggestions and not exhaustive)
Opportunities		
Share	An opportunity is shared with a partner or supplier to maximise the benefits through use of shared resource/technology etc.	Technical/operational/infrastructure e.g. new technology, improved designs.
Exploit	A project could be adjusted to take advantage of a change in technology or a new market.	Economic/financial/market e.g. new and emerging markets, positive changes in exchange rates or interest rates.
Enhance	Action is taken to increase the likelihood of the opportunity occurring or the positive impact it could have.	Strategic/commercial opportunities such as new partnerships, new capital investment, new promoters.
Reject	Here no action is taken and the chance to gain from the opportunity is rejected. Contingency plans may be put in place should the opportunity occur.	Political or environmental e.g. new transport links, change of government bringing positive changes in policy/opportunities for lobbying etc.

- Sometimes Risk Register may be numeric: Likelihood x Impact = value. (If Value > 75 then look at and plan, if Value < 75 document and watch).

Step 3: Project Management Plan

- **PMP – Exercise 1**: Take 10 minutes to discuss the following components as it pertains to our Case Study:
 - Assume Project Scope:
 - Stage 1 : Evaluate and Procure 1 single Financial Solution.
 - Stage 2: Implement the single Financial Solution and begin moving over each company one at a time.
 - Procurement Plan
 - Very high-level requirements
 - Communications Plan (Internal and External)
 - Resource Plan (people, equipment, rooms, etc.)

Step 3: Project Management Plan

- **PMP – Exercise 2**: Take 10 minutes to complete this RACI Chart (R=Responsible, A=Accountable, C=Consult, I=Inform):

Task Item	Project Sponsor	Financial SME	Project Business Analyst	Project Manager
Obtain Project Funding				
Create Project Charter				
Determine new System's Features				
Select New Financial System				

Step 3: Project Management Plan

- **PMP – Exercise 2:** (R=Responsible, A=Accountable, C=Consult, I=Inform):

Task Item	Project Sponsor	Financial SME	Project Business Analyst	Project Manager
Obtain Project Funding	R A	C	-	I
Create Project Charter	R A	-	-	R
Determine new System's Features	C	C	R A	I
Select New Financial System	R	I	I	R A

Step 3: Project Management Plan

- **PMP – Exercise 3**: Take 10 minutes to Create 3 Risks (2+ threats + 1 Opportunity):

Id	Date Raised	Risk Description	Threat / Opport	Likelihood	Impact	Severity	Owner	Mitigating Action	Contingent Action	Progress on Action	Status

PROJECT PLANNING

Project Planning

- Requirements
 - Detailed Requirements
 - WBS (Work Breakdown Structure)
- Example: Task: Painting a House
- Requirements: Paint a House
 - Detailed Requirements:
 - Paint Interior of House
 - Paint Exterior of House

Project Planning

- Requirements: Paint a House
 - Detailed Requirements:
 - Paint Interior of House
 - WBS
 1. Select Paint Colours per room
 2. Select Finishes per room (Glossy v.s. Flat)
 3. Go to Store to get Paint and Supplies
 4. Put down plastic to protect floors/carpet
 5. Tape room
 6. Paint primer/first coat – let dry
 7. Paint 2nd coat – let dry
 8. Inspect and touch up if needed
 9. Clean up (brushes, remove plastic/tape)
 - Paint Exterior of House

Project Planning

- Benefits of a WBS ?

Project Planning

- Benefits of a WBS ?
 - Gets to the detailed level to fully understand the task
 - uncover needed resources
 - Shows a logical flow of the sequences
 - Can roll up to give a picture of the time element for the task.

Project Planning

- Can roll up to give a picture of the time element for the task.
 - Paint Interior of House [Roll-up value: 15 days]
 - WBS
 1. Select Paint Colours per room – 1 day
 2. Select Finishes per room (Glossy v.s. Flat) (same day as colour)
 3. Go to Store to get Paint and Supplies – 0.5 day
 4. Put down plastic to protect floors/carpet – 0.25 day per room x 6 rooms = 1.5 days
 5. Tape room – 0.50 day per room x 6 rooms = 3 days
 6. Paint primer/first coat – let dry – 0.75 day per room x 6 rooms = 4.5 days
 7. Paint 2nd coat – let dry – 0.50 day per room x 6 rooms = 3 days
 8. Inspect and touch up if needed – 1 day
 9. Clean up (brushes, remove plastic/tape) – 0.5 day

Project Planning

- If 3 weeks for the task is unacceptable to the client - Maybe the schedule can be “compressed” by doing some of the tasks in parallel or by adding additional people *
- * Note: There is an optimum number of people for any task sometimes adding too many people causes adverse affect.
- Famous Saying: “9 women being pregnant for 1 month does not make a baby”.
- Example 2: Symposium “SWAG” Volunteer committee.

Project Planning

- If 3 weeks for the task is unacceptable to the client - Maybe the schedule can be “compressed” by doing some of the tasks in parallel or by adding additional people *
- Paint Interior of House *[Roll-up value: 15 days]*
 - WBS
 1. Select Paint Colours per room – 1 day – Day 1
 2. Select Finishes per room (Glossy v.s. Flat) (same day as colour)
 3. Go to Store to get Paint and Supplies – 0.5 day – Day 1
 4. Put down plastic to protect floors/carpet – 0.25 day per room x 6 rooms = 1.5 days. Day 1 – 1 Prep person can plastic all rooms.
 5. Tape room – 0.50 day per room x 6 rooms = 3 days –
Day 1 Prep person can tape rooms 1 and 2, Day 2 rooms 3 and 4, Day 3 rooms 5 and 6

Project Planning

6. Paint primer/first coat – let dry – 0.75 day per room x 6 rooms = 4.5 days –

– Option 1 (1 painter)

- » Day 1: Painter can start in afternoon to paint room 1 once prepped.
- » Day 2: Painter can do room 2 and part of room 3
- » Day 3: remainder of room 3 + room 4
- » Day 4: room 5 + part of room 6
- » Day 5: remainder of room 6

– Option 2 (2 painters)

- » Day 1: Painter 1 can start in afternoon to paint room 1 once prepped and Painter 2 can do room 4.
- » Day 2: Painter 1: room 2 + part of room 3 | Painter 2: room 5 + part of room 6.
- » Day 3: Painter 1: remainder of room 3 | Painter 2: remainder of room 6.

Project Planning

- WBS

- 7. Paint 2nd coat – let dry – 0.50 day per room x 6 rooms = 3 days

- 1 Painter 3 days or 2 Painters for 1.5 days each

- 7. Inspect and touch up if needed – 1 day

- 1 Painter 1 day or 2 Painters for 0.5 days

- 7. Clean up (brushes, remove plastic/tape) – 0.5 day

- Prep guy could come back and do after painter is finished.

- So based on schedule allowed or # of resources the task could be: 15 days for 1 person; or 5 days if employing Prep Person + 2 painters. Just 1 component of a whole Plan.

Project Planning

- Example: Moving into a new house:
 - Task 1: buy house
 - Task 2: take possession of house
 - Task 3: clean house
 - **Task 4: Paint Interior of house (15 days or 5 days??)**
 - Task 5: Paint exterior of house
 - Task 6: Lay carpet or hardwood
 - Task 7: Move in furniture
 - Task 8: Move out of current place

Project Planning

- **“Critical Path”**
 - Definition:
 - “Longest sequence of activities in a project plan which must be completed on time for the project to complete on due date. An activity on the critical path cannot be started until its predecessor activity is complete; if it is delayed for a day, the entire project will be delayed for a day unless the activity following the delayed activity is completed a day earlier.”

Project Planning – Critical Path

Example: Moving into a new house:

- Task 1: buy house
- Task 2: take possession of house
- Task 3: clean house
- **Task 4: Paint Interior of house (15 days or 5 days??)**
- Task 5: Paint exterior of house
- Task 6: Lay carpet or hardwood
- Task 7: Move in furniture
- Task 8: Move out of current place

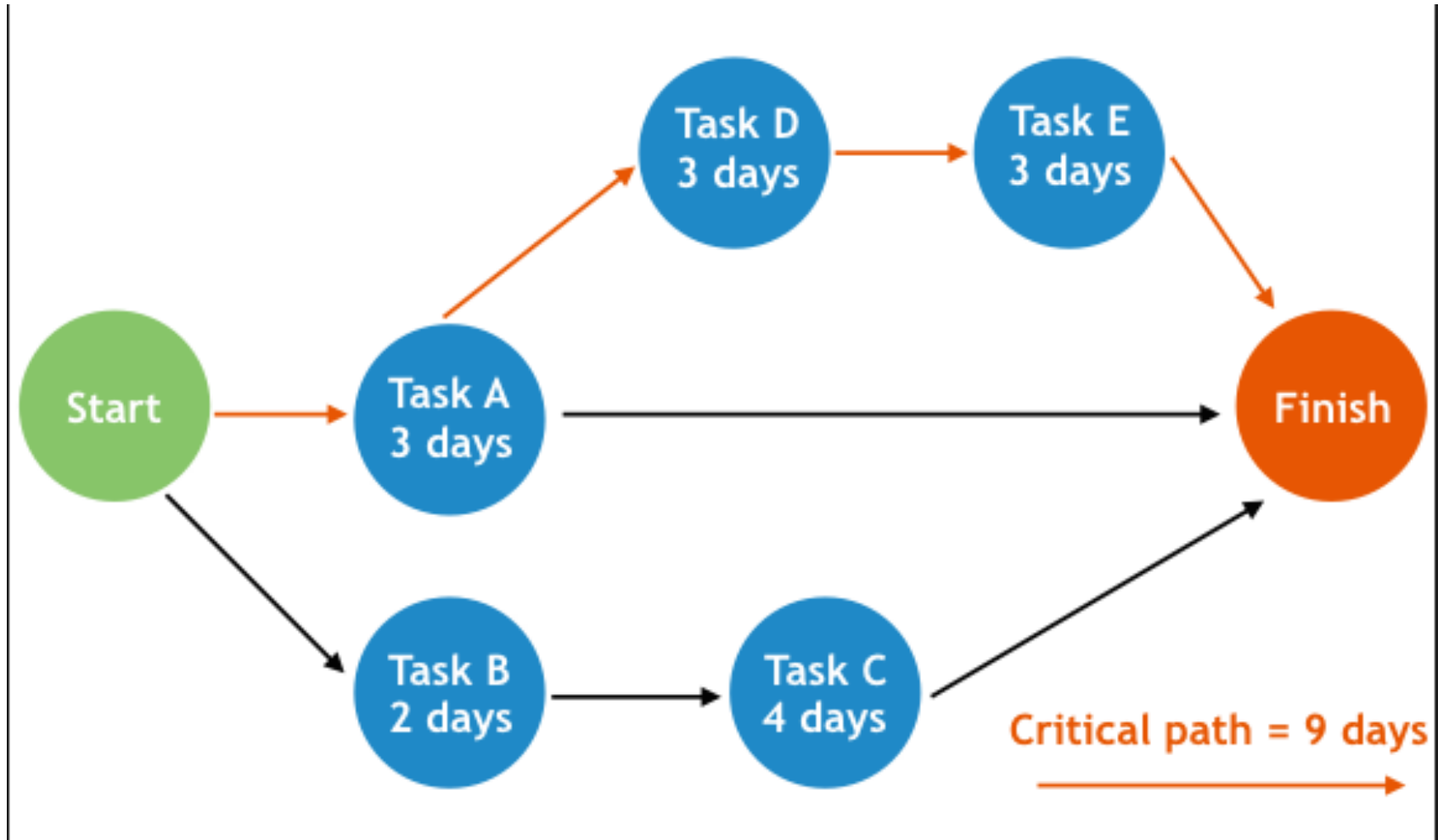
Project Planning – Critical Path Exercise

- Take the “Buying a House” example and can any of the tasks be done in parallel, which tasks are dependent on another?
- Example: Moving into a new house:
 - Task 1: buy house
 - Task 2: take possession of house
 - Task 3: clean house
 - **Task 4: Paint Interior of house (15 days or 5 days??)**
 - Task 5: Paint exterior of house
 - Task 6: Lay carpet or hardwood
 - Task 7: Move in furniture
 - Task 8: Move out of current place

Project Planning – Critical Path Exercise

- Take the “Buying a House” example and can any of the tasks be done in parallel, which tasks are dependent on another?
- Example: Moving into a new house:
 - #1 - Task 1: buy house
 - #2 - Task 2: take possession of house
 - #3 - Task 3: clean house
 - #4 - Task 4: Paint Interior of house (15 days or 5 days??)
 - #4B - Task 6: Lay Carpet or hardwood
 - » #4C - Task 7: Move in furniture
 - » #4D - Task 8: Move out of current place
 - #5 (in parallel with #4) Task 5: Paint exterior of house

Project Planning – Critical Path Sample



Case Study

- Take 15 minutes and create a WBS for:
 - Part 1 of the new Financial System – Research and Select Financial Solution Product.
 - Part 2 of the Project: How to migrate over an existing Company from their current Financial System to the new selected one (assuming it's a different platform).

Project Planning

- With WBS and rolled up Work Items
 - You can now look at creating:
 1. Defined Scope (Scope baseline)
 2. a schedule (Schedule baseline)
 3. Resource needs
 4. 1 + 2 + 3 above then you can create Costing/Budget (Cost baseline)

Once established (Scope baseline, Schedule baseline, Cost baseline) the PM can manage and report against these.

Project Planning

- Take all the pieces and break them down into manageable deliverables.
- Example:
 - Release 1
 - Items A, B, C, E, F, Z Work Packages
 - Release 2
 - Items D, G, I, L Work Packages
 - Release 3
 - Items N, O, W, Y Work Packages

Project Planning

	June, 2018				July, 2018				August, 2018					Sept, 2018				Oct. 2018				Nov, 2018					Dec, 2018			
Task	8	15	22	29	6	13	20	27	3	10	17	24	31	7	14	21	28	5	12	19	26	2	9	16	23	30	7	14	21	28
Sprint 0																														
BA/Fin SME (Requirements for Sprint 1)	█	█																												
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BA and Fin SME (Req for Sprint 2)						█	█																							
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QA (Test cases and testing)			█	█																										
Client UAT and defect logging						█																								
Sprint 2																														
BA and Fin SME (Req for Sprint 3)									█	█																				
BA and Fin SME (support for Sprint 2 DEV)						█																								
Dev						█	█																							
Dev - agreed fixes from Sprint 1							█																							
QA (Test cases and testing - Sprint 2)							█	█																						
QA (re-testing Sprint 1 fixes and Regression testing)							█																							
Client UAT and defect logging (Sprint 2 + defects from S1)										█																				
Release into Production											█																			

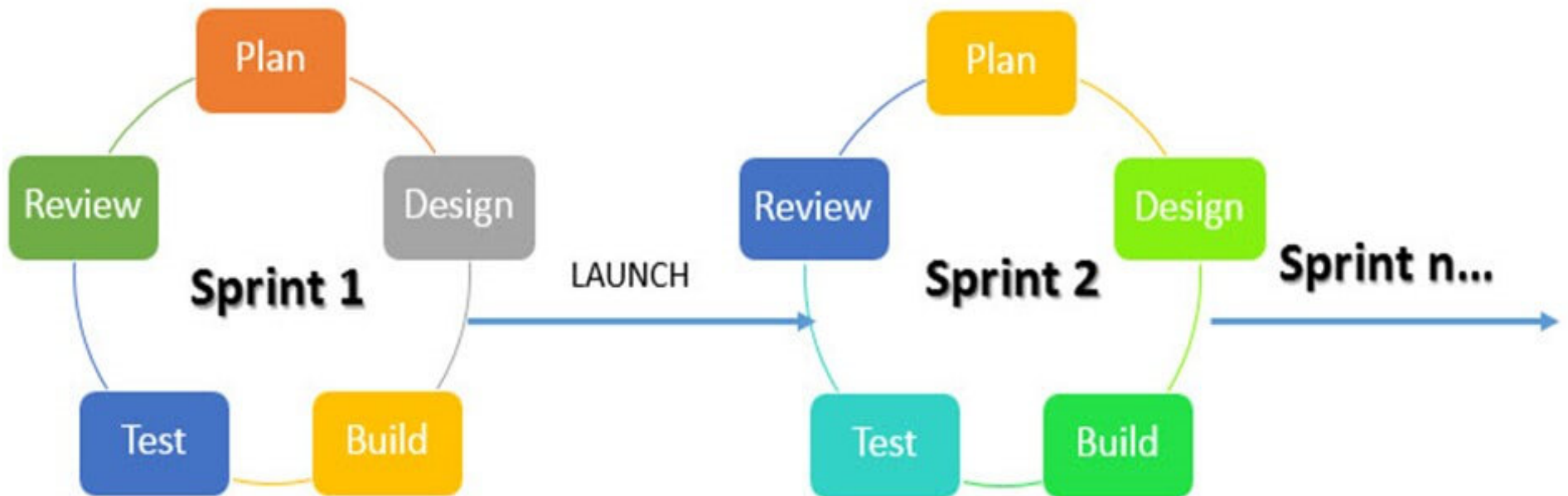
Project Planning – Case Study

- Take 5 minutes and from your list of Part 2 “Migrating over an Existing Financial System” Tasks and WBS try to logically group them into 3 separate Project Sprints.
- Things to remember:
 - Are there Tasks that need to be done before others?
 - Are there large Tasks that need to be broken down between multiple Sprints?

PROJECT EXECUTION

Project Execution – Repeatable Steps

- Agile Diagram on SLDC



Project Execution – Repeatable Steps

- Remember Diagram on SLDC

Task	June, 2018				July, 2018				August, 2018				
	8	15	22	29	6	13	20	27	3	10	17	24	31
Sprint 0													
BA/Fin SME (Requirements for Sprint 1)	█	█											
Sprint 1													
BA and Fin SME (Req for Sprint 2)					█	█							
BA and Fin SME (support for Sprint 1 DEV)			█										
Dev			█	█									
QA (Test cases and testing)			█	█									
Client UAT and defect logging					█								
Sprint 2													
BA and Fin SME (Req for Sprint 3)							█	█					
BA and Fin SME (support for Sprint 2 DEV)					█								
Dev					█	█							
Dev - agreed fixes from Sprint 1						█							
QA (Test cases and testing - Sprint 2)						█	█						
QA (re-testing Sprint 1 fixes and Regression testing)						█							
Client UAT and defect logging (Sprint 2 + defects from S1)								█					
Release into Production								M					

Project Execution – Repeatable Steps

- BA and Finance SME developing 1st set of detailed requirements in Sprint 0.
- Sprint 1 – BA and finance SME working on 2nd set of detailed Requirements. Dev working on Sprint 0 dev. QA working on test cases and testing of Sprint 0.
- Finance SME at daily Scrum to chase down last minute gaps or clarify DEV understanding.
- QA Test Cases | UAT Test Cases.
- User Acceptance Testing – defects logged and steps taken to reproduce. “Mutual” decision what needs to be fixed before “go live” v.s. later phase.

Project Execution – Case Study

- Take 10 minutes to look at your “Project Part 2 – Migrating Over an Existing Financial System to the New Platform”:
 - List some UAT Test Cases you would like to see conducted to ensure the delivered solution meets your business needs.

PROJECT MONITORING AND CONTROLLING

Monitoring and Control – Preventing Below from Happening



Project Monitoring and Controlling

1. Manage against Plans (Scope, Schedule, Costs)
2. Status Reporting
 - PM responsible for giving weekly, bi-weekly, or monthly status reports to Stakeholders/Project Sponsors.
 - PM will ask for specific stats that may seem difficult to give – “how far along are you with “x” task?” “when will you be done with “y”?”
 - These are needed for a complete picture of where the project is in terms of schedule/costs.
 - You may be asked to send by email at the end of each week or asked verbally at the regular Project Team status meeting.

Project Monitoring and Controlling

3. Quality Issues / Defects – Software v.s. Manufacturing
4. Change Requests:
 - Understand the business/technical change requested
 - Options (include, don't include, include later, etc.)
 - Impact Analysis – Pros/Cons, ROI, impact on schedules/costs [plans]
 - Not just DEV but also Training documentation, communications, etc.
 - Steering Committee – Approval/Denied decision
 - If Approved – update work plans and docs

Project Monitoring and Controlling – Change Requests in More Detail

Example: In our Case Study. We are now in our 3rd year of the Financial Migration Project. We have selected a Financial Reporting Product and just about to migrate over our 3rd company. We plan to go “Live” with Company 3 on September 15th. The Team is excited.

“Lessons Learned” from Company 1 and 2 migration have greatly reduced the headaches and pain-points for this Company 3 migration.



Project Monitoring and Controlling – Change Requests in More Detail

However.....there is always a “but”



Company-wide Email Announcement

World Wide Plastics is proud to announce that we have just purchased our major competitor, Almost World Wide Plastics, based in France. More details to come in the next week’s CEO Town Hall meeting. Please be assured that no job cuts will occur.

Project Monitoring and Controlling – Change Requests in More Detail

Office is all “a buzz” with this news. Project work stops for team members to talk about impacts.

What are some of the immediate questions you’d have based on this announcement?

Project Monitoring and Controlling – Change Requests in More Detail

Potential Impacts to Your Project:

- What financial system does “Almost World Wide Plastics” use?
- When does Dr. Penny expect that AWWP’s financial system be integrated? ASAP? Within 3 years? The new 6th company to be added to your current project? As a later project?
- AWWP is in Frances (new territory to operate in) – does our selected Financial Reporting system handle currency and language?
- *Assuming will be handled as 6th company expected to be integrated at the end of this project – CR needed.*

Project Monitoring and Controlling – Change Requests in More Detail

Change Request written:

- Problem or Opportunity stated.
- Background info if needed.
- Options
- Pros/Cons, ROI, impacts to existing plans and schedules for each Option.
 - Ex. Impact to Resources (need for longer, need to do analysis on AWWP or get some of their Finance SME's assigned to this project)
 - Impact Schedule. Project end date now longer.
- Recommendation to Steering Committee

Project Monitoring and Controlling – Change Requests in More Detail

Change Request (continued):

- [Steering Committee meets to discuss]
- CR reviewed, discussed, and voted on.
- If Denied: CR goes into file folder and denial recorded (who, why, date)
- If Approved: plans updated, schedules extended, documents updated. CR goes into file folder and approval recorded (who, why, date).

PROJECT CLOSING

Project Closing

- Update documentation.
- Lessons Learned – how to do future similar projects better: processes, people, skills, etc. “No time for Ego” – purpose is to refine or establish “best practices”.
- Project Closing (however defined within the organization or PMO).
- Store in shared document depository for future reference – now becomes Historical Data.
- Release remaining resources.

Jennifer Read

PMI OVOC AND PROJECT MANAGEMENT CERTIFICATION

Who Is Project Management Institute (PMI)?

- Global Organization (headquartered in USA)
- The leading not-for-profit professional membership association for the project management profession
- Over 528,000 Members world-wide
- Offer 8 Project Management related certifications
 - Project Management Professional (PMP)
 - Program Management Professional (PgMP)
 - Portfolio Management Professional (PfMP)
 - Certified Associated in Project Management (CAPM)
 - PMI Professional in Business Analysis (PMI-PBA)
 - PMI Agile Certified Practitioner (PMI-ACP)
 - PMI Risk Management Professional (PMI-RMP)
 - PMI Scheduling Professional (PMI-SP)

Who Is Project Management Institute Ottawa Valley Outaouais Chapter (PMI OVOC)

- One of 290 PMI Chapters in North America, and 18 in Canada
- Run by volunteers
- Over 2300 members
- Annual Activities
 - PMP Certification Training
 - Professional Development events – lunches and Saturday morning Seminars
 - 3 day annual Symposium
- Support Volunteer opportunities for PMs within the chapter, looking to support volunteer project management opportunities within the local community

Overview of the PMP Certification

- Globally recognized and demanded, the PMP certification demonstrated to employers, clients and colleagues that a project manager possesses project management knowledge, experience and skills to bring projects to successful completion.
- The PMP recognizes the competence of an individual to perform in the role of a project manager, specifically experience in leading and directing projects.
- Year after year, the PMP certification has garnered global recognition.

PMP Certification Requirements

Prerequisites

- Secondary degree (high school diploma, associate's degree or the global equivalent)
- 7,500 hours leading and directing projects
- 35 hours of project management education

OR

- Four-year degree
- 4,500 hours leading and directing projects
- 35 hours of project management education

Exam - 4 hour 200 question multiple guess exam (At examination Centre). To be written within one year

Cost - \$555 USD (non-member) / \$405 US (PMI member) (Includes Exam)

Maintaining Your PMP Certification

- To maintain your PMP, you must earn 60 professional development units (PDUs) every three years.
 - Minimum of 35 PDU from Education
 - Technical – minimum of 8 PDUs
 - Leadership – minimum of 8 PDUs
 - Strategic - minimum of 8 PDUs
 - Remaining 11 from any component of the Talent Triangle
 - Maximum of 25 PDUs from Giving Back to the Profession
 - Working as a Professional – maximum of 8 PDUs
 - Volunteering & Creating Knowledge – maximum of 17 PDUs
- Renewal fee of \$ 60 USD (PMI Member) / \$150 USD (Non-member)

The PMI Talent Triangle®



Overview of the CAPM Certification

- The CAPM certification offers recognition to practitioners who are interested in or are just starting a career in project management, as well as project team members who wish to demonstrate their project management knowledge.
- This certification denotes that the individual possesses the knowledge in the principles and terminology of A Guide to the Project Management Book of Knowledge (PMBok Guide), which outlines generally recognized good practices in project management.

CAPM Certification Requirements

Prerequisites

- Secondary degree (high school diploma, associate's degree or the global equivalent)
- 1,500 hours of project experience
- OR
- 23 hours of project management education completed by the time you sit for the exam
- The certification exam has 150 multiple choice questions, and you have three hours to complete it.

Maintaining Your CAPM Certification

- To maintain your CAPM, you must retake the exam every five years.

Why Become a Member of PMI

- Be part of the largest PM community
- Track your certification status with myPMI
- Download the PMBOK® Guide for free
- Save on career-advancing certifications
- Unlock 1,000+ tools and templates
- Find relevant jobs with the PM Job Board
- Get more, free opportunities to earn PDUs
- Stay up-to-date with PMI publications
- Annual Cost - \$129 USD / year + \$10.00 USD Application Fee
- PMI OVOC Chapter Cost - \$25 USD / year

Wrap Up



Wrap Up

Always happy to answer any future questions, we can be reached at:

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