

FROM SCORE TO PERFORMANCE PROJECT PLANNING AND TROUBLESHOOTING

DAVID JORDAN & JENNIFER JOHNSON

PROJECT MANAGEMENT IS AN EXERCISE IN LEADERSHIP...

SOUND FAMILIAR?

SiTech Root Problems

1. Ad-hoc project planning
2. Infrequent, subjective project monitoring and roadblock removal
3. Management didn't prioritize work and say no to some projects
4. Difficulty managing urgent interrupts from ongoing factory operations
5. Unclear roles, responsibility, and accountability regarding projects
6. Culture of firefighting



PMI
Global Congress
NORTH AMERICA 2009

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OBJECTIVES

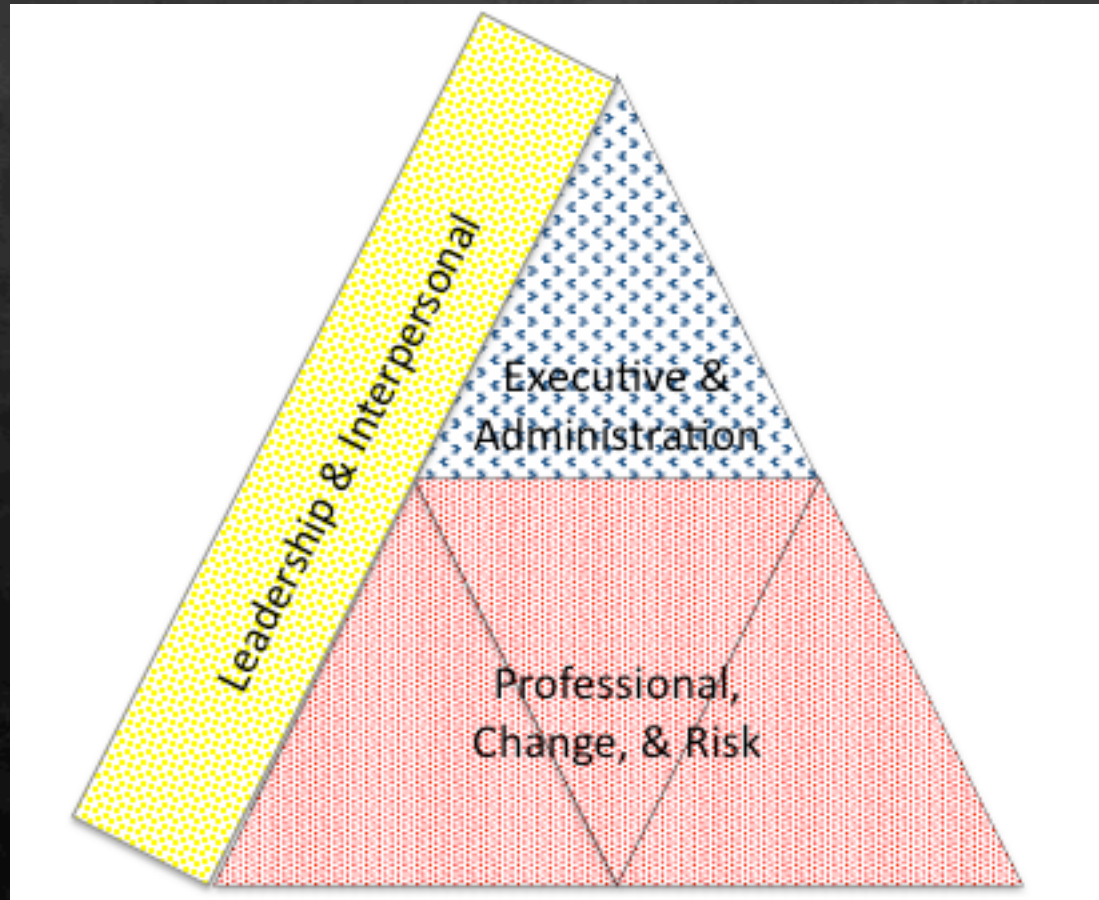
PROVIDE LEADERSHIP IN PLANNING PROJECTS

PROVIDE LEADERSHIP IN TROUBLESHOOTING PROJECTS

USE ESTABLISHED & PROVEN PROJECT MANAGEMENT TECHNIQUES

MANAGE HUMAN DYNAMICS OF PROJECT TEAMS AND STAKEHOLDERS

MPLA LEADERSHIP KNOWLEDGE AND SKILLS MODEL



KNOWLEDGE AND SKILLS FOR PROJECT MANAGEMENT

LEADERSHIP & INTERPERSONAL

EMPATHY

CONFLICT MANAGEMENT

ADAPTABILITY

ORGANIZATIONAL MANAGEMENT

TEAMWORK AND COLLABORATION

INFLUENCING

PROFESSIONAL

COMMUNICATION

PROJECT MANAGEMENT (*TECHNICAL*)

DELEGATION

EXECUTIVE & ADMINISTRATIVE

OPERATIONS

FINANCE

DO YOU HAVE A PROJECT TO MANAGE?

RESOURCES (LABOR, CAPITAL)

TASKS

BUDGET

MEET BUSINESS OBJECTIVE

ASSIGNED TO RESPONSIBLE PERSONNEL

HAS AN IMPACT ON PROFIT

PROJECTS VS. OPERATIONS

PROJECT

TEMPORARY / TIME-LIMITED

DEFINED START AND END IN TIME

UNIQUE/ONE-OFF RESULT

*(PREPARING REFRESHMENTS FOR NEW
YEARS' EVE PARTY)*

OPERATIONS

ONGOING AND OPEN-ENDED

NEVER "FINISHED"

REPETITIVE PRODUCTION OF "SAME"
RESULT

(PREPARING DAILY FAMILY MEALS)

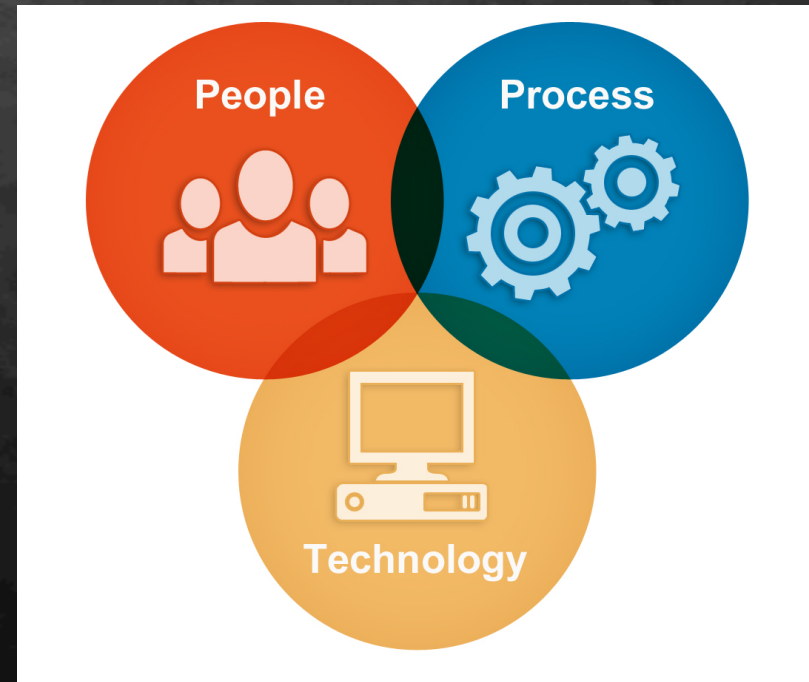
(Kuster 2015)

TYPICAL MP PROJECT EXAMPLES

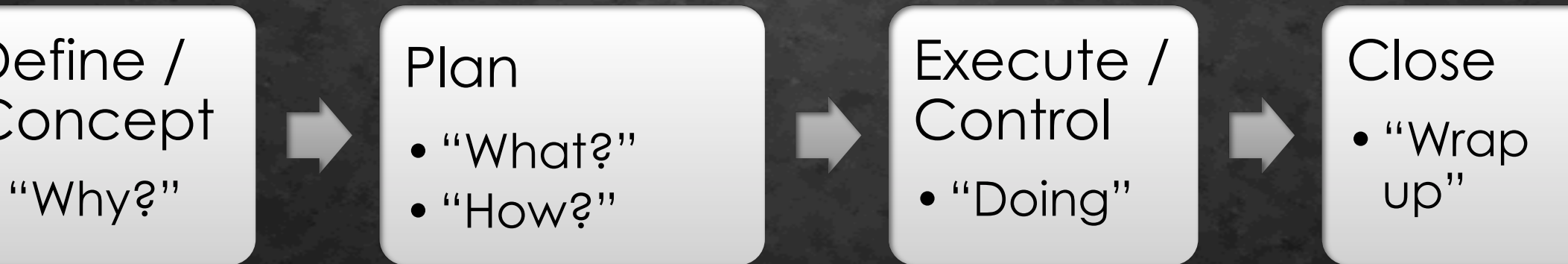
START A RESIDENCY PROGRAM

CREATE OR UPDATE QC
PROCESS/PROCEDURE/TOOL

DEPLOY A NEW CLINICAL
SOFTWARE/IT SYSTEM



PROJECT MANAGEMENT PHASES



EACH PHASE IS DEFINED BY GATES/CHECKPOINTS

PHASE BENEFITS

DEFINE / CONCEPT

DEFINING – CHOOSING THE RIGHT PROJECT

SAYING YES OR NO

DEFINING DELIVERABLES/
EXPECTATIONS



DEFINING – STATEMENT OF WORK (SOW)

WHAT IS THE REAL PROBLEM
TRYING TO SOLVE?
("WHY?")

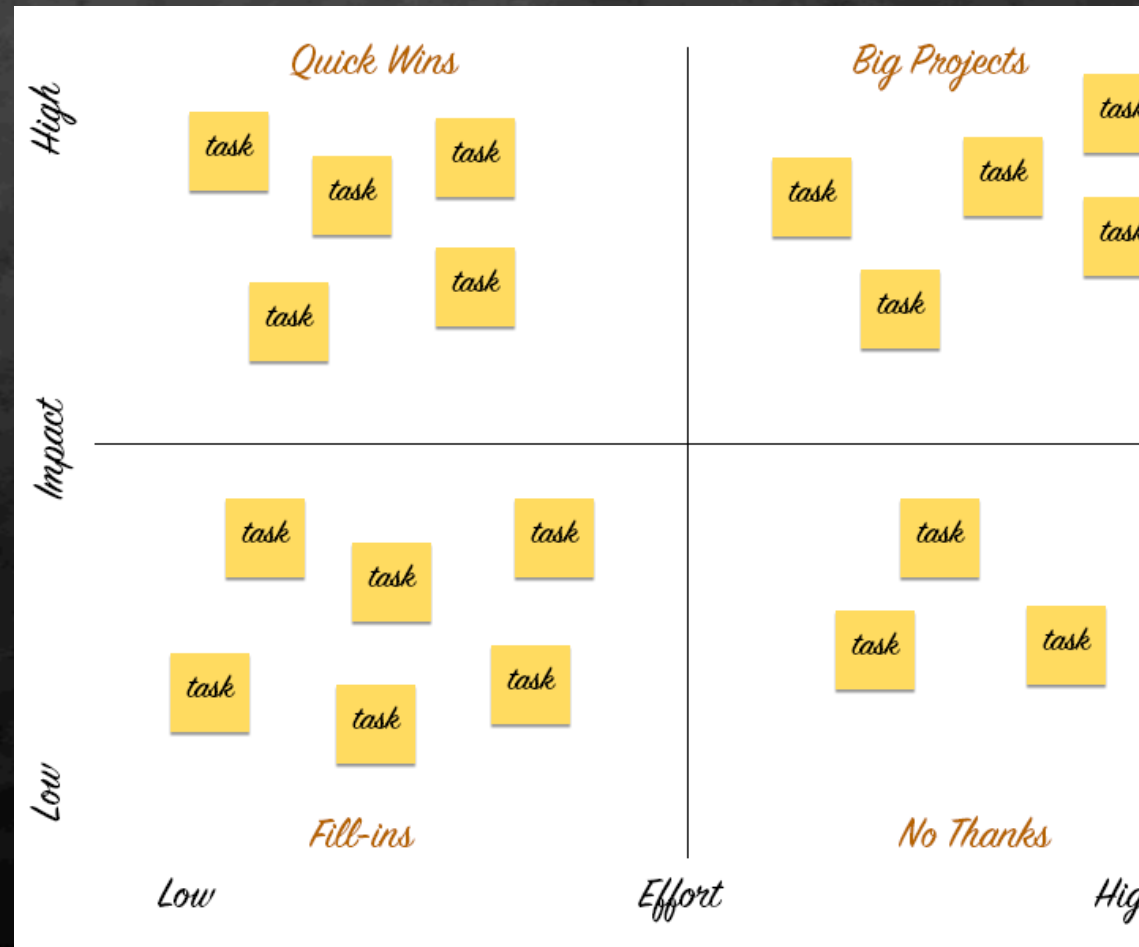
WHO ARE THE
STAKEHOLDERS?



DEFINING – STATEMENT OF WORK (SOW)

WHAT IS THE PRIORITY OF
THIS PROJECT, RELATIVE TO
OTHER DEMANDS ON
RESOURCES IN THE
ORGANIZATION?

WHOSE PRIORITY
IS IT? (APPROVAL LINE)



KNOWLEDGE AND SKILLS FOR DEFINE STAGE

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PLAN

CHALLENGE #1: PLANNING AMIDST AMBIGUITY?

PLANNING SEEMS EASY (TRIVIAL) ASSUMING YOU WILL KNOW WHAT TO DO.



OFTEN THE CHALLENGE IS THAT YOU WON'T KNOW WHAT TO DO

PROJECT MANAGEMENT MODELS

FORMAL (FROM SOFTWARE ENGINEERING):

WATERFALL

ITERATIVE

AGILE MANIFESTO

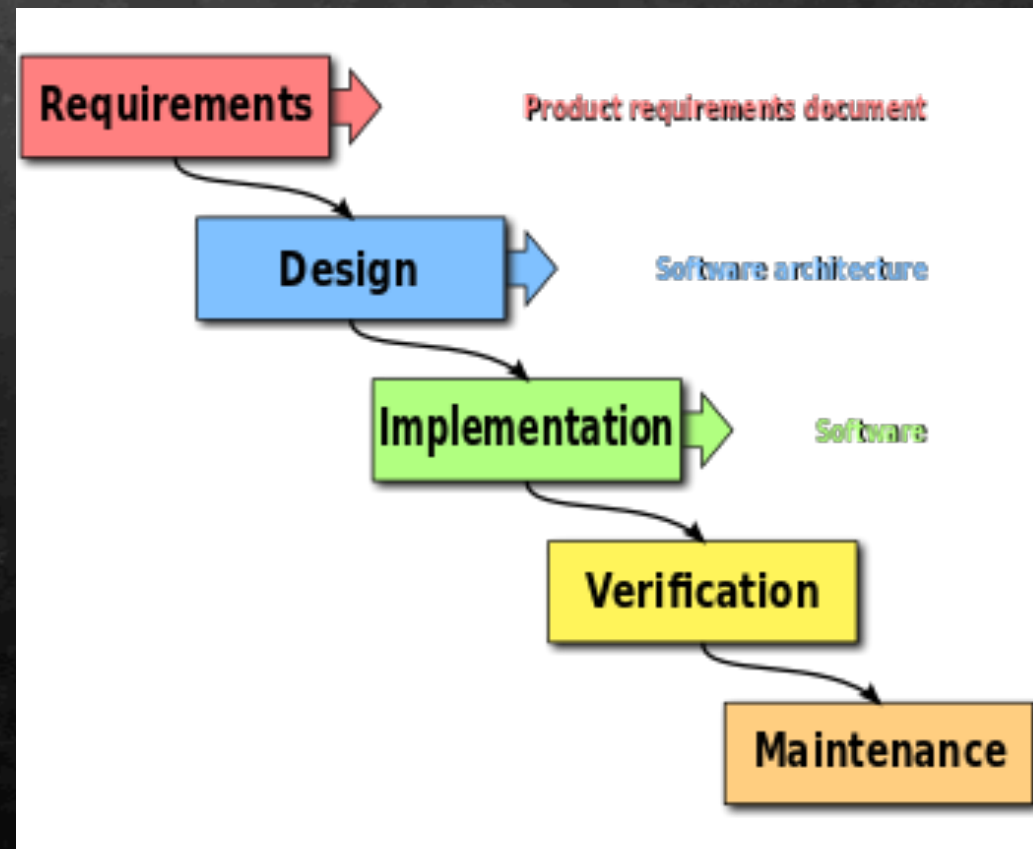
INFORMAL

GETTING THINGS DONE / NATURAL PLANNING MODEL

WATERFALL MODEL

STRICT SEQUENCE OF
REQUIREMENTS ANALYSIS,
DESIGN, AND DEVELOPMENT
PHASES

RECOMMENDED COMPLETE
STEPS *TWICE*



ITERATIVE MODEL

FEEDBACK-DRIVEN REFINEMENT

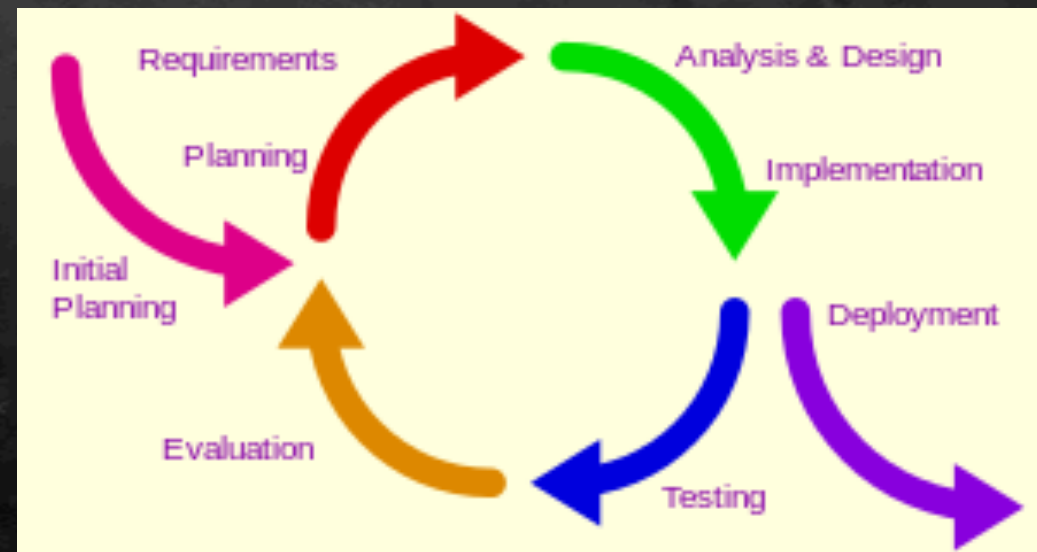
CUSTOMER INVOLVEMENT

CLEARLY DELINEATED ITERATIONS
(~ 1 – 6 WEEKS)

SPIRAL MODEL

PRIORITIZE DEVELOPMENT CYCLES BY
RISK

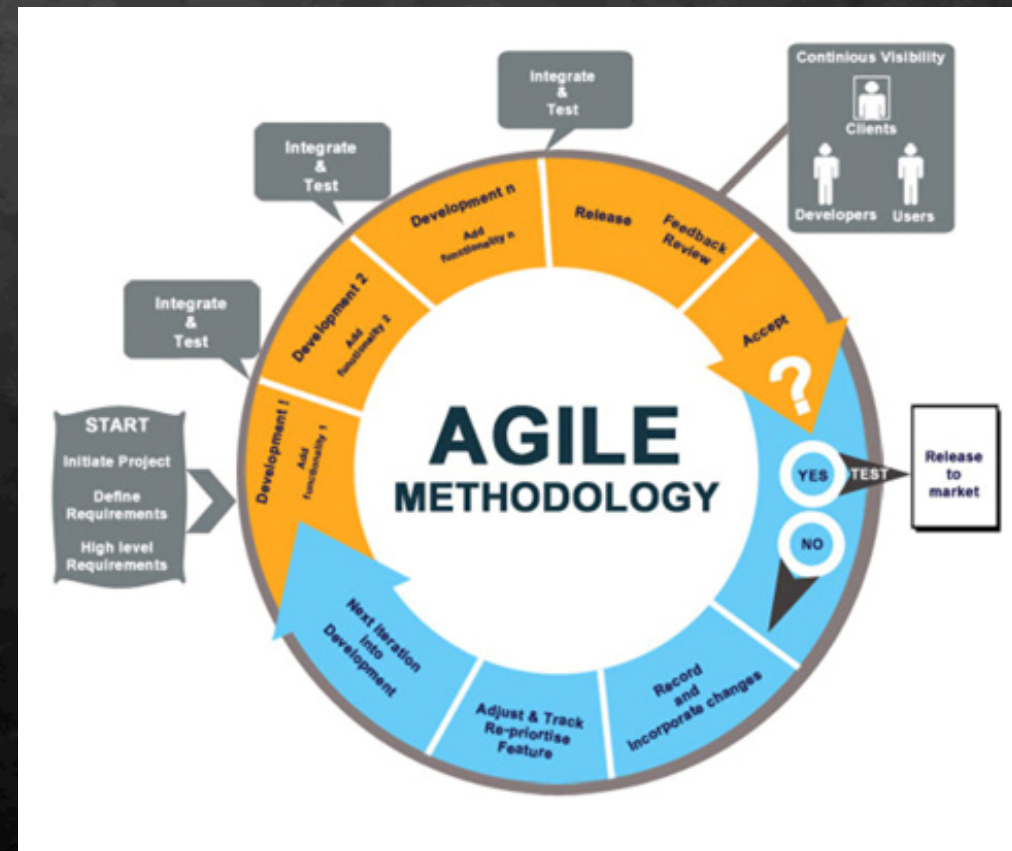
rmann and Basili 2003)



[https://commons.wikimedia.org/wiki/
File:Iterative_development_model.svg](https://commons.wikimedia.org/wiki/File:Iterative_development_model.svg)

AGILE MANIFESTO

PROMOTE MODERN, SIMPLE
ITERATIVE AND INCREMENTAL
DEVELOPMENT



<http://www.aplicattech.com/agile-project-management-aplica>

NATURAL PLANNING MODEL

“BEGIN WITH THE END IN MIND” (STEPHEN COVEY)

DESCRIBE THE DESIRED OUTCOME

DESCRIBE THE SPECIFIC STEPS THAT MUST BE TAKEN (VISIBLE, PHYSICAL ACTIONS)

GRANULAR, NON-AMBIGUOUS TASK DEFINITION

ESTABLISH QUALITY BENCHMARKS: “WHAT DOES ‘DONE’ LOOK LIKE?”

(Allen 2002)

WORK BREAKDOWN STRUCTURE (WBS)

WHAT IS IT?

TOP-DOWN STARTING FROM PROJECT OUTCOME

BREAK DOWN TO INDIVIDUAL TASKS = “WORK PACKAGES”

WORK PACKAGES CAN BE GROUPED INTO “SUMMARY TASKS”

WHY MAKE IT?

HIGHLIGHT GAPS / INFORMATION STILL NEEDED

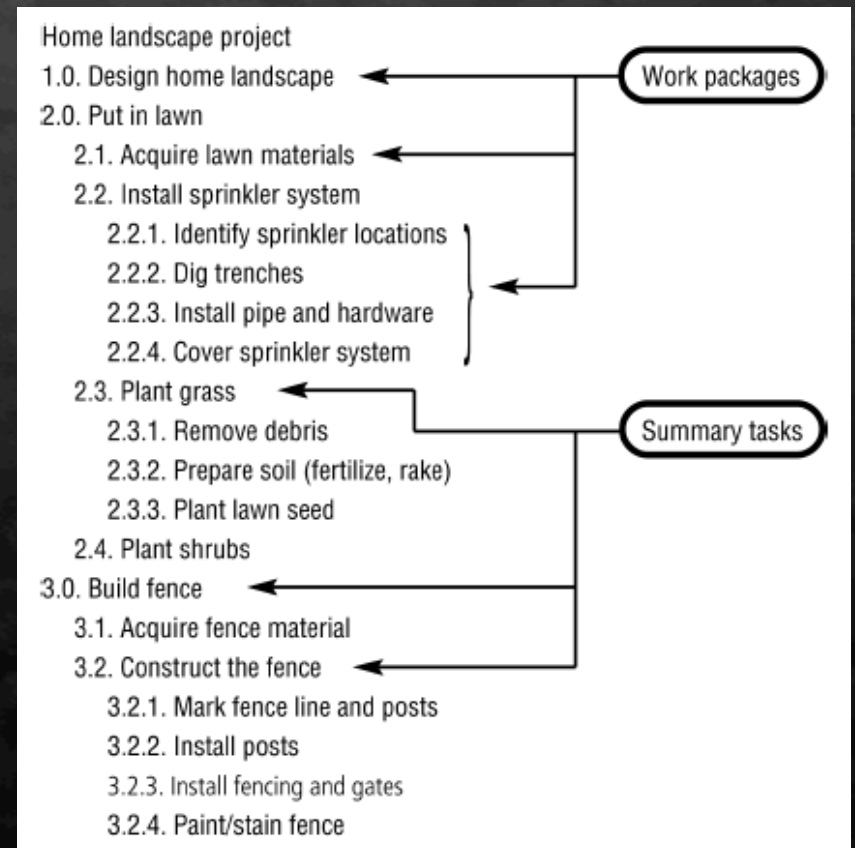
IDENTIFY DEPENDENCIES

PLAN FOR PEOPLE, TIME, AND RESOURCES NEEDED

WORK BREAKDOWN STRUCTURE (WBS)

CREATE HIGH-LEVEL
SUMMARY TASKS AND
WORK PACKAGES

GET HELP FROM TEAM OF
FRONT-LINE WORKERS,
EXPERTS TO DETERMINE
DETAILS OF WORK
PACKAGES



(Verzuh 2016)

DEVELOPMENT OF RESOURCED SCHEDULE

USING THE WBS:

- IDENTIFY RELATIONSHIPS BETWEEN WORK PACKAGES

- PLACE IN SEQUENCE

FOR EACH WORK PACKAGE, DETERMINE:

- WHO WILL DO IT?

- HOW LONG WILL IT TAKE?

- WHAT RESOURCES ARE NEEDED?

GANTT CHART: TIME AND CRITICAL PATH

The Project Management Game

"Test your skill as a project manager!"

Game

Instructions

Discuss

A project management game... its free. To play just assign your staff to the various tasks in the schedule and hit the Start button. Its easy, its fast, and there is nothing to download.

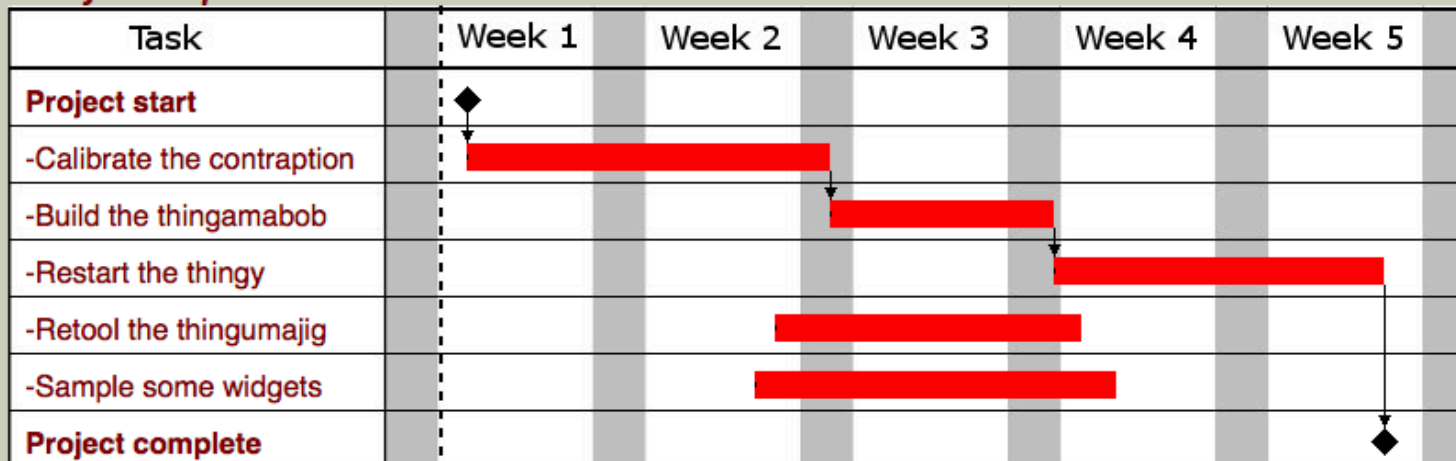
Your resources

Your budget: \$864,000

Your staff:

- Jim Jim is average
- Mark Mark is expensive
- Bob Bob is fast and expensive
- Kathy Kathy is fast

Project alpha



Start!

Spent

assign? \$0k

assign? \$0k

assign? \$0k

assign? \$0k

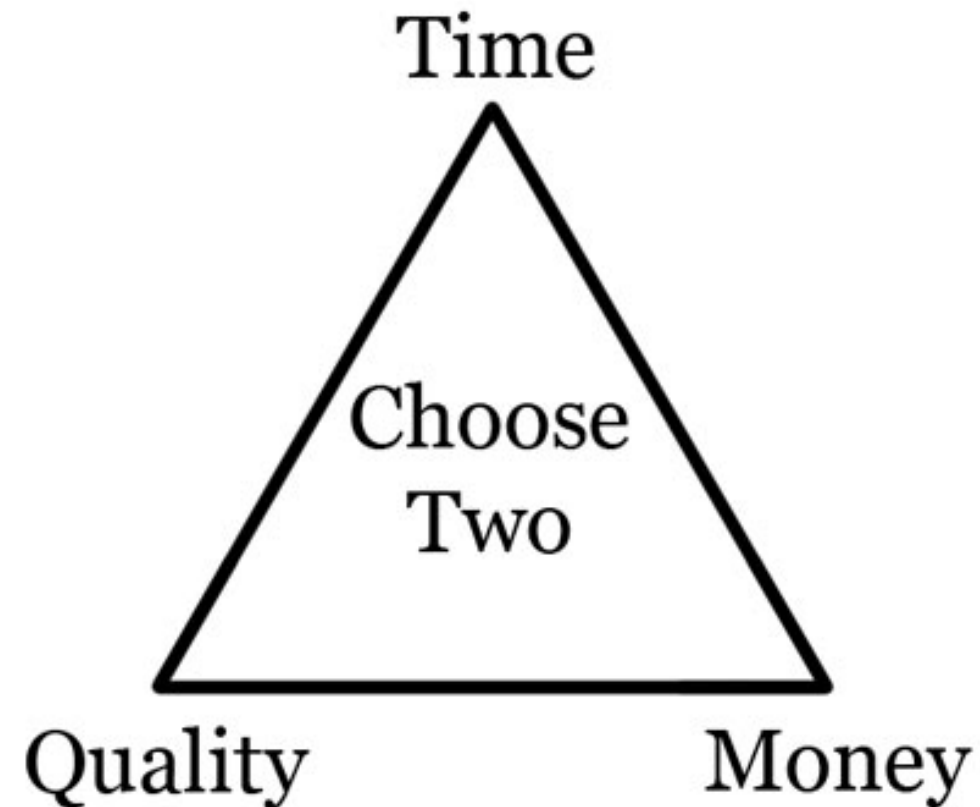
assign? \$0k

<http://thatpmggame.com>

CHALLENGE #2: RESOURCES

PROJECT MANAGER'S TRIANGLE

MUST NEGOTIATE TRADE-OFFS
SINCE RESOURCES ARE FINITE



(Verzuh 2011)

BUDGETING

ESTIMATING TIME REQUIREMENTS

ESTIMATING MONEY REQUIREMENTS

PAD, BUT DON'T OVER-DO IT

BE TRANSPARENT WITH STAKEHOLDERS:

ASSUMPTIONS USED TO CREATE THE BUDGET

REASONING BEHIND ANY PADDING

“THIS IS MY BEST ESTIMATE, BUT THIS IS ONLY AN ESTIMATE”

CHALLENGE #3:

Analysis Paralysis

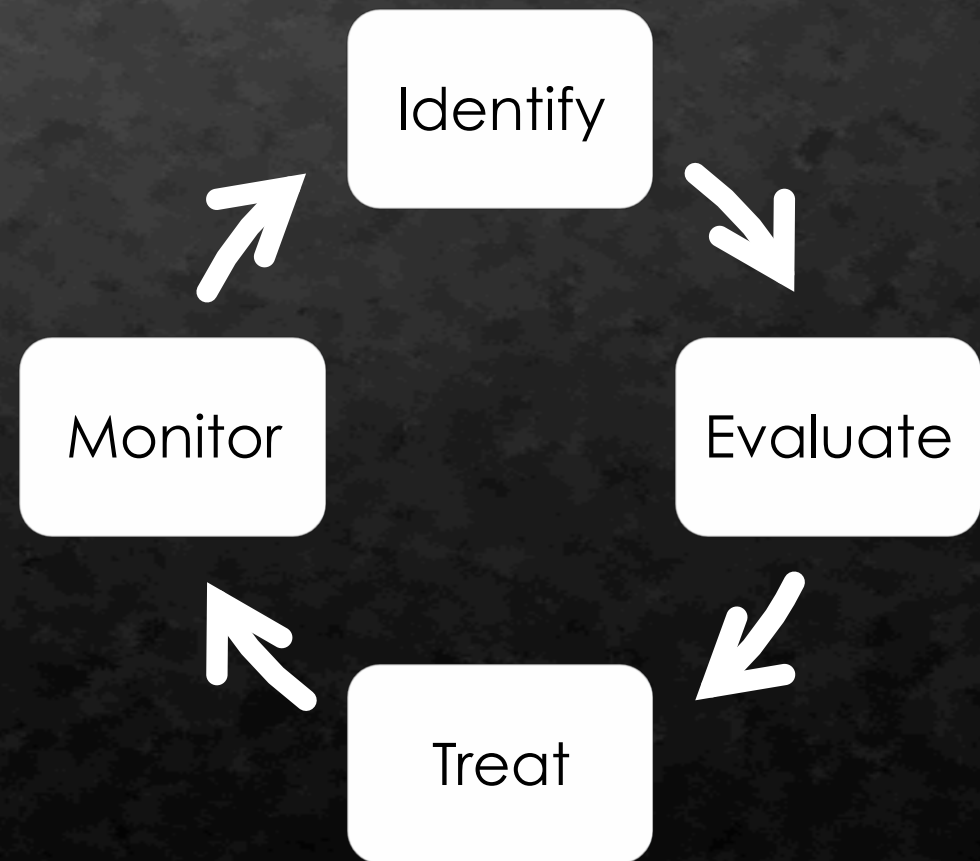
over-analyzing (or over-thinking)
a situation so that a decision or
action is never taken.

AVOID "ANALYSIS PARALYSIS"



CHALLENGE #4: RISKS

PLAN FOR RISKS / PERFORM
RISK ANALYSIS



COMMUNICATION PLAN

SHOULD BE EXPLICITLY DEFINED

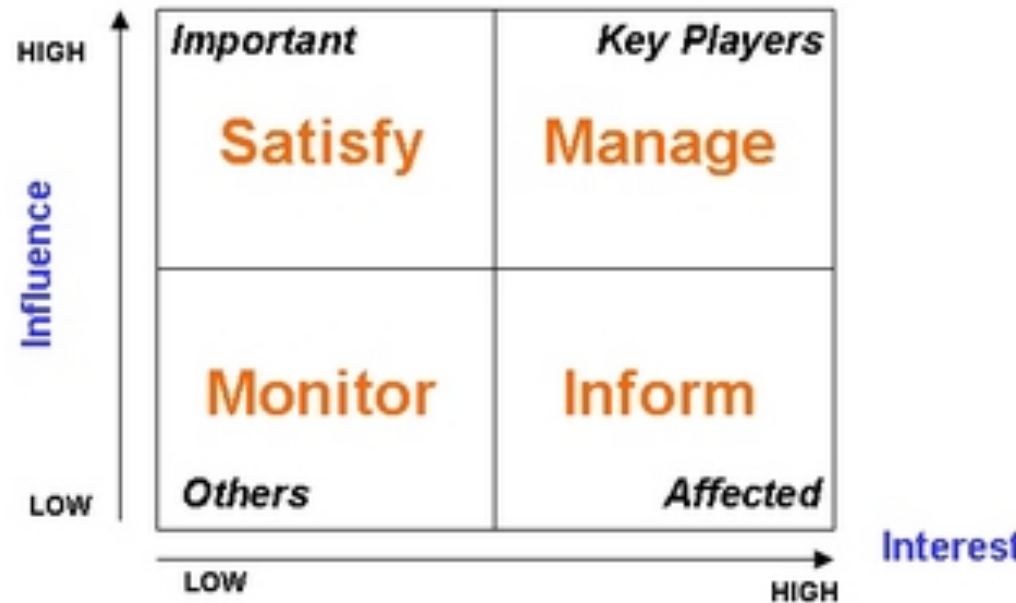
WHAT?

WHO?

HOW OFTEN?

WHAT CHANNELS/FORMAT?

Communication Strategies



COMMUNICATION PLAN

To Whom?	What?	How often? / When (date)?	What channels/ format?
Affected members	Project status update	Weekly	FW: email
Boss	Status and barriers	Monthly	FV: Face-to- face meeting

Key to Types of Communication

FW: Formal Written IW: Informal Written
FV: Formal Verbal IV: Informal Verbal

KNOWLEDGE AND SKILLS FOR PLAN STAGE

LEADERSHIP & INTERPERSONAL

EMPATHY

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FINANCE

EXECUTE / CONTROL

DOING

MILESTONES / MEASURE PROGRESS

QUANTITY, QUALITY, AND TIMELINESS OF INFORMATION/FEEDBACK

WHAT IS YOUR “DASHBOARD”?

MILESTONES (DEFINED DURING PLANNING IF POSSIBLE)

MANAGE RISKS

RE-PLAN FOR CHANGING AND UNFORESEEN CIRCUMSTANCES

CHALLENGE #5 : SCOPE CREEP

SMALL CHANGES IN A PLAN OR
PROJECT THAT NECESSITATES
OTHER CHANGES WHICH
LEAD TO STILL MORE
CHANGES...



<http://www.akaroleff.com/content/scope-creep-can-be-managed>
<http://www.businessdictionary.com/definition/scope-creep.html>

CHALLENGE #5 : SCOPE CREEP

CAUSES

UNEXPECTED ISSUES

PERFECTIONISM / GOLD PLATE

PLACATING STAKEHOLDERS

MISUNDERSTANDINGS

YOUR GREAT IDEAS (WRONG
TIME!)

CHANGE CONTROL

DEFINE PROCESS & EXPECTATIONS

WEB DESIGN: “NOT JUST ADDING
ANOTHER BUTTON”

<http://www.akaroleff.com/content/scope-creep-can-be-managed>
<http://www.businessdictionary.com/definition/scope-creep.html>

KNOWLEDGE AND SKILLS FOR EXECUTE STAGE

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CLOSE

WRAP UP / CLOSE OUT

DELIVER THE DELIVERABLE

AFTER-ACTION REVIEW

ARCHIVE ANY REUSABLE TEMPLATES AND CONTENT FOR
FUTURE PROJECTS

AFTER-ACTION REVIEWS

HELD IMMEDIATELY AT END OF PROJECT

INCLUDE LEADERS AND FRONT-LINE STAFF CARRYING OUT TASKS

COMPARE ACTUAL WITH INTENDED (PLANNED) RESULT

EXAMINE REASONS FOR ANY DIFFERENCES

OPEN-ENDED, ACTIVE INQUIRY AND LEARNING

(US Army 1993)

KNOWLEDGE AND SKILLS FOR CLOSE STAGE

LEADERSHIP & INTERPERSONAL

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TROUBLESHOOTING

PROJECT SCOPE

REAL ISSUE: COMMUNICATION OF STAKEHOLDER NEEDS & EXPECTATIONS

DID SCOPE CHANGE OR “CREEP”?

WAS SCOPE CLEARLY DEFINED AND COMMUNICATED AT THE BEGINNING?

WAS THERE UNDERSTANDING BY ALL PARTIES?

UPON PROBLEM DISCOVERY, CONFLICT MAY ARISE

PROJECT SCOPE: CORRECTING COURSE

CAN PROJECT BE ACCOMPLISHED WITH COMMITTED BUDGET,
SCHEDULE?

WHAT ADJUSTMENTS ARE NECESSARY/POSSIBLE?

REAFFIRM SHARED GOALS

DELEGATION TO PROJECT TEAMS

PROVIDE CLEAR ENOUGH DIRECTION AND SUFFICIENT RESOURCES
(TIME, MONEY, SPACE, EQUIPMENT, ETC.) TO ACCOMPLISH THE TASK
AS DIRECTED

PROJECT MANAGER'S JOB IS TO REMOVE AMBIGUITY FOR TEAM
MEMBERS

DELEGATION TO PROJECT TEAMS

WHEN DELEGATING: YOU ARE STILL ACCOUNTABLE FOR TASKS
CRITICAL:

- TRACKING PROGRESS

- REGULAR FOLLOW-UPS

LEVELS OF INITIATIVE: PREFERRED = ACT INDEPENDENTLY AND
REPORT BACK AT REGULAR SCHEDULED INTERVALS

DEFINE IN COMMUNICATION PLAN

HUMAN DIMENSIONS

PROCRASTINATION

GETTING UNSTUCK: EXCUSES ARE REALLY NEXT STEP TASKS OR
SUB-PROJECTS STANDING IN CRITICAL PATH

HESITANT TO ASK QUESTIONS / APPEAR IGNORANT

CORRECTING FOR PROCRASTINATION

ENSURE UNDERSTANDING OF OUTCOME AND ACTIONS
REQUIRED

ENSURE APPROPRIATE RESOURCES PROVIDED

ESTABLISH EARLY CHECK-INS TO VERIFY PROGRESS

MAKE IT SAFE TO FAIL (FAIL EARLY AND FAIL SMALL)

BE AWARE OF OVERLOAD AND BURNOUT!

I HAVE TOO MANY PROJECTS. I'M FREAKING OUT.



Dilbert.com DilbertCartoonist@gmail.com

EXPERTS SAY YOU SHOULD TACKLE THE MOST UNPLEASANT TASKS FIRST, SO YOU HAVE A FEELING OF ACCOMPLISHMENT AND CONTROL.



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NOW I HAVE TOO MANY PROJECTS AND SOME EXTRA ANXIETY THAT I'M DOING THEM IN THE WRONG ORDER.



OFF YOU GO.



TOOLS AND SOFTWARE

SEEK SIMPLE: AVOID TOO MUCH COMPLEXITY

WHAT FUNCTIONALITY DOES YOUR PROJECT REALLY NEED?

WHO NEEDS TO SEE WHAT, WHEN?

WHO IS PUTTING IN INFORMATION AND UPDATING, HOW,
AND HOW OFTEN?

**REMEMBER THAT THE US NUCLEAR POWER PLANT FLEET WAS BUILT AND THE MANHATTAN PROJECT CARRIED OUT WITHOUT USING MS PROJECT*

(Kuster 2015)

REVIEW AND SUMMARY

TECHNICAL ASPECTS OF PROJECT MANAGEMENT USE SPECIFIC TECHNIQUES AND SKILLS

GOOD PROJECT MANAGEMENT IS A LEADERSHIP EXERCISE THAT DEMANDS:

COMMUNICATION

EMPATHY

MANAGEMENT OF CONFLICTS (PREFERABLY BY ANTICIPATION)

TOLERANCE AND MANAGEMENT OF AMBIGUITY

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