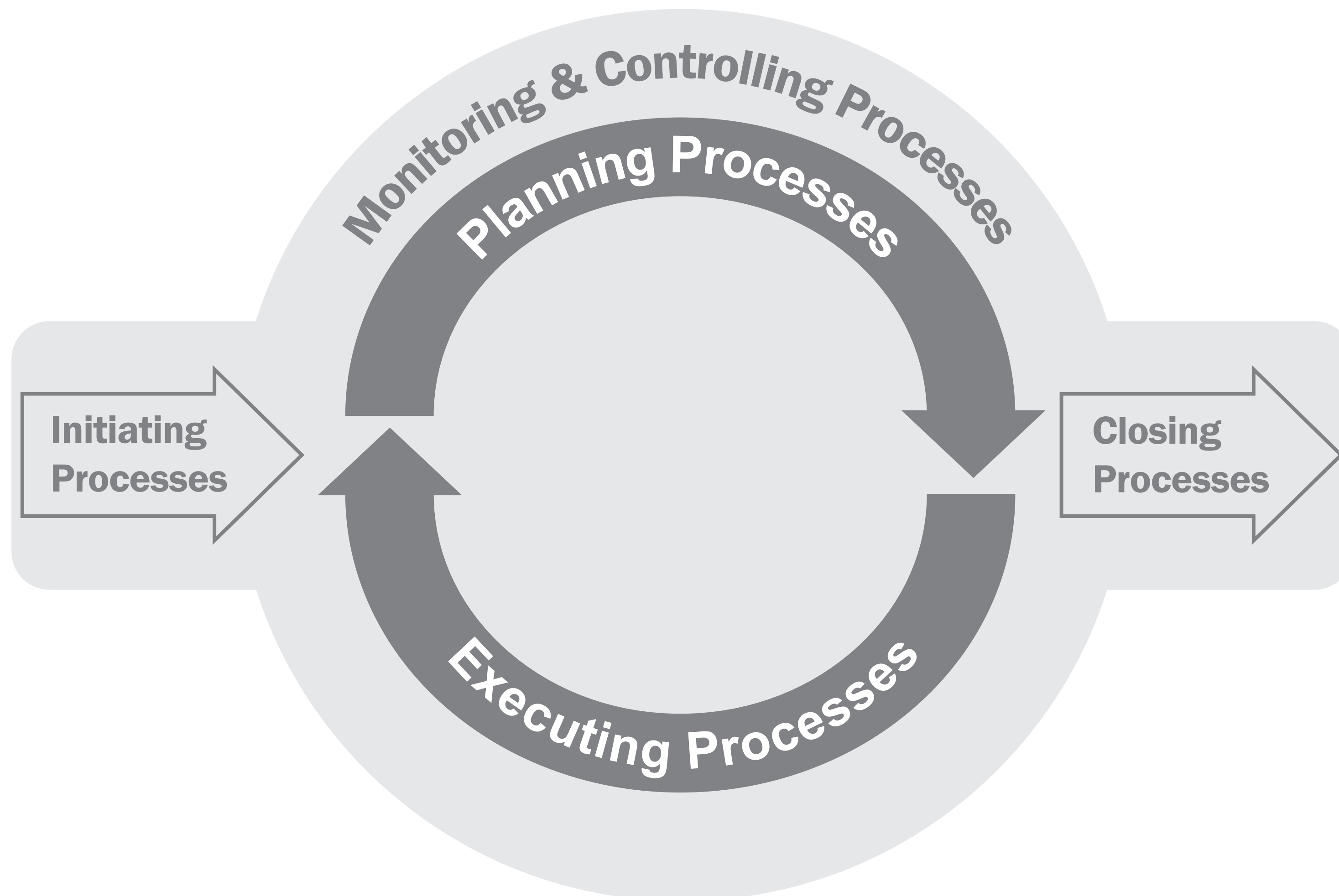


The Project Management Process



Initiating

- ☐ Business Needs
- ☐ Feasibility
- ☐ Authorization
- ☐ Stakeholders
- ☐ Project Charter
- ☐ Project Description
- ☐ Project Purpose
- ☐ Objectives
- ☐ Requirements
- ☐ Triangle Flexibility

Executing

- ☐ Acquire the Team and Procure Resources
- ☐ Develop the Team
- ☐ Direct and Manage
- ☐ Execution
- ☐ Manage Quality
- ☐ Collect and Distribute Information
- ☐ Manage Stakeholder Expectations

Closing

- ☐ Project Deliverable Acceptance
- ☐ Objective Measurement
- ☐ Analyze Project Results and Lessons Learned
- ☐ Archive Project Data
- ☐ Follow Up

Planning

- ☐ Project Scope Statement
- ☐ Product Description
- ☐ Product Acceptance Criteria
- ☐ Deliverables
- ☐ Exclusions
- ☐ Constraints
- ☐ Assumptions
- ☐ Approach
- ☐ Procurement Planning
- ☐ Work Breakdown Structure
- ☐ Effort Estimates
- ☐ Cost Estimates
- ☐ Sequence Tasks
- ☐ Schedule
- ☐ Resources
- ☐ Communication Management Plan
- ☐ Quality Management Plan
- ☐ Change Management Plan
- ☐ Risk Management Plan

Monitoring & Controlling

- ☐ Monitor & Control Project Work
- ☐ Integrated Change Control
- ☐ Scope Verification
- ☐ Scope Control
- ☐ Perform Quality Control
- ☐ Performance Reporting
- ☐ Risk Monitoring & Control
- ☐ Procurement Administration

PROJECT INITIATION WORKSHEET

Business Needs

- Improve the image of the association
- Improve the image of our company
- Break even financially
- Improve Frank's chances for election
- Develop new business for our company
- Provide valuable services to association members
- Provide professional development opportunities for members

Feasibility Assessment

- Our company appears to have adequate people
- Our company will pay for our team's time
- We have desktop publishing and word processing capability in-house
- Direct costs can be reimbursed from conference proceeds
- We can use technology (internet, e.g.) to reduce costs of communicating with members
- The association has a large pool of members (potential attendees)

PROJECT CHARTER WORKSHEET

High Level Project Description:

A successful industry conference in New Orleans for approximately 1,800 attendees and 200 guests/spouses. The conference must include a registration system, a program of events, marketing materials, an industry showcase, and all management of the conference.

Project Purpose or Justification:

The conference should improve the image of the association, improve image of company, develop new business for the company, provide valuable information to the association members, provide professional development opportunities for members, and enhance Frank's chance for election.

Objectives:

Description with Success Criteria	Method of Measurement
Increase attendance by 10% over last year.	Count paying attendees
Ensure all costs are covered by revenue.	Variation of zero or less on expenditures versus budget reports
Hold registration fees to last year's level.	Zero increase
Provide interesting and educational workshops.	Attendee exit survey
Sessions/topics such that attendees rate the sessions a 5 or greater on a scale of 1-7.	Pre-registration monitored weekly through registration reports. Onsite registration wait times measured by a timer system.
Provide a speedy registration process as shown by 75% of attendees register via pre-registration and onsite registration wait time of less than 15 minutes average.	Timing system
Families and spouses rate outside activities a 5 or greater on a scale of 1-7.	Exit survey

PROJECT CHARTER WORKSHEET (CONTINUED)

High-Level Requirements:

Conference must be better than last year's effort.

Conference must reflect favorably on company and also Frank.

High-Level Risks:

Ten months not long time to plan major conference.

Last year's conference was not very good and could discourage people attending this year.

Planning a conference is not our core skill set.

Availability of sites in New Orleans in the timeframe required is uncertain.

Summary Schedule:

Conference to be held 10 months from current time

Summary Budget:

Preliminary budget of \$125,000.

Project Approval Requirements:

Success is meeting all of the objectives.

For our company, Dan O'Donnell, VP of Project Managers will both decide on project success and sign off on the project.

For the association, the Association Board will sign off on the project.

Stakeholders:

Dan O'Donnell, project manager; project team; Frank Isch, association board of directors; association members, guests, vendors, and speakers.

SCOPE STATEMENT WORKSHEET

Product Scope:

5-day Conference held in New Orleans. Conference will include:

Saturday	Registration and workshops
Sunday	Registration and workshops
Monday	Registration, opening session, conference sessions throughout the day, lunch, keynote speech, and evening event
Tuesday	Conference sessions, lunch speaker, and major evening event
Wednesday	Conference sessions and closing session

Scope of project will include

- A. Arranging conference facilities and managing the conference
- B. Selecting topics for workshops and papers
- C. Arranging speakers and presenters
- D. Arranging an industry showcase for products of interest to the membership
- E. Creating brochures, registration forms, schedules of events and other necessary documentation
- F. Handling all promotional activities
- G. Handling registration (advance and onsite)

Product Acceptance Criteria:

From a company standpoint, the preliminary project plan is determined to have a high likelihood of meeting all of the objectives.

From an association standpoint, the preliminary project plan is determined to be acceptable to the Association Board.

SCOPE STATEMENT WORKSHEET (CONTINUED)

Project Deliverables:

Block of hotel rooms	Attendance & fee reports
Workshops and locations	Post-conference evaluation surveys and process
Display space and floor plans	Budget
Registration System (web-based & onsite)	Status reports
Publicity (brochures, posters, member emails)	Communication plan
Project Schedule	Project plan
Accounting system	Vendors and vendor contracts
Entertainment	Project team hotel reservations & travel arrangements
Agenda	Network connections at conference site
Security	Insurance
Medical	Food and catering
Transportation from airport to hotel	Transportation for family events
A/V equipment for speakers	Speakers and speaker contracts

Project Exclusions:

Will not include making hotel reservations for participants, speakers, or vendors.

Will not include arranging non-conference transportation for participants.

Project Constraints:

Only 10 months until the conference

Location predetermined

Limited budget

Memory of last year's conference

Project Assumptions:

PM and key staff can be relieved of other company duties to work on conference.

Sufficient hotel and conference space is available in New Orleans in the timeframe needed.

Sufficient transportation is available.

“X” number of participants will attend.

All resources will be made available per project plan.

PROJECT APPROACH WORKSHEET

Project Approaches:

Increase attendance:

- Schedule interesting local excursions
- Publicize heavily
- Offer discounts/prizes for early sign-up
- Plan activities for children
- Invite industry recognized expert speakers

Increase attendance of spouses/children:

- Interesting local tours and activities
- Specific activities for children
- Research what other conferences have done

Control costs:

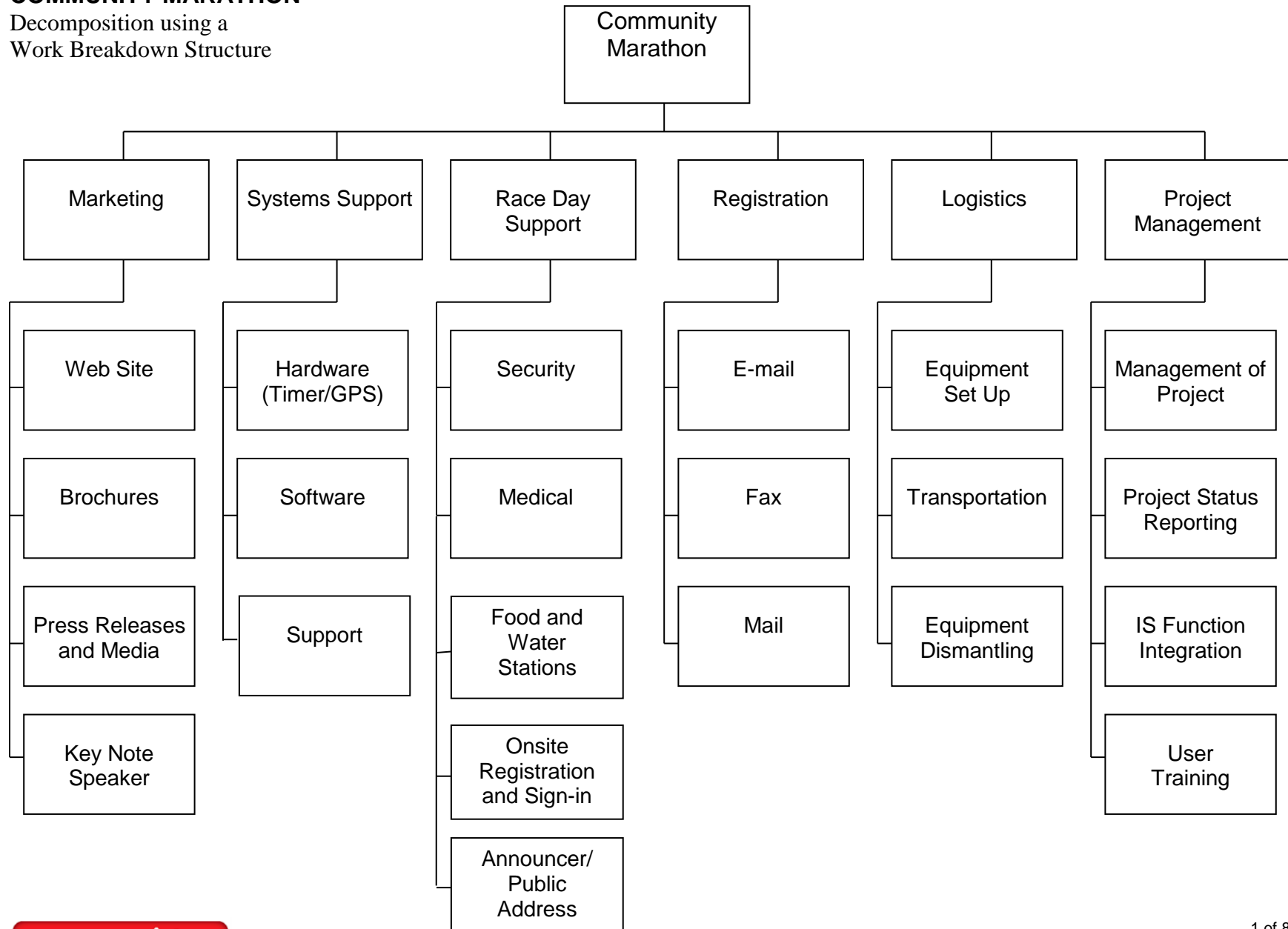
- Solicit vendor donations
- Charge for display space
- Solicit company donations/sponsorship

Provide interesting topics/workshops:

- Lessons learned from other conferences
- Survey membership
- Determine what are currently the “Hot” topics
- Bring in a “big name” celebrity

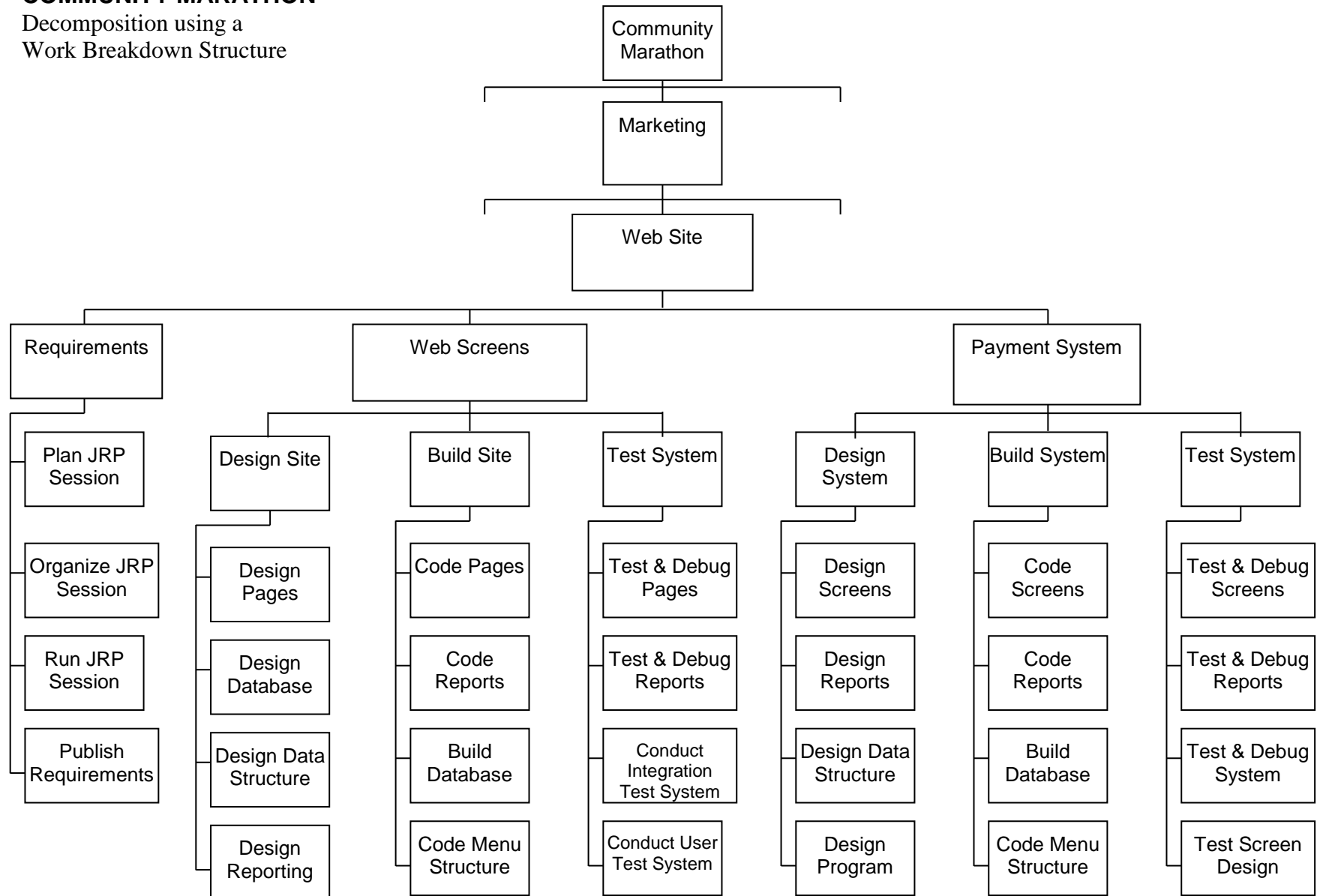
COMMUNITY MARATHON

Decomposition using a
Work Breakdown Structure



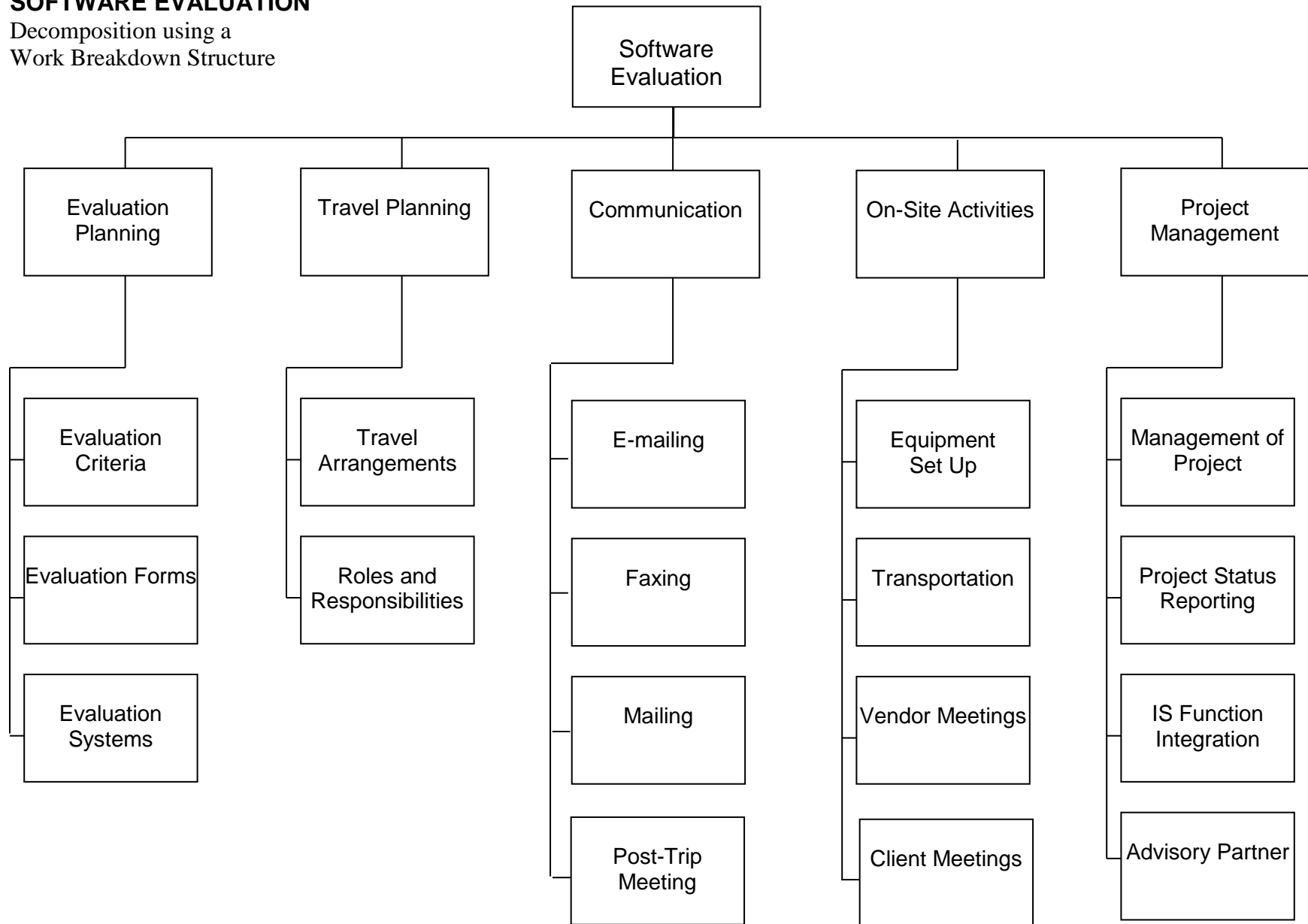
COMMUNITY MARATHON

Decomposition using a
Work Breakdown Structure



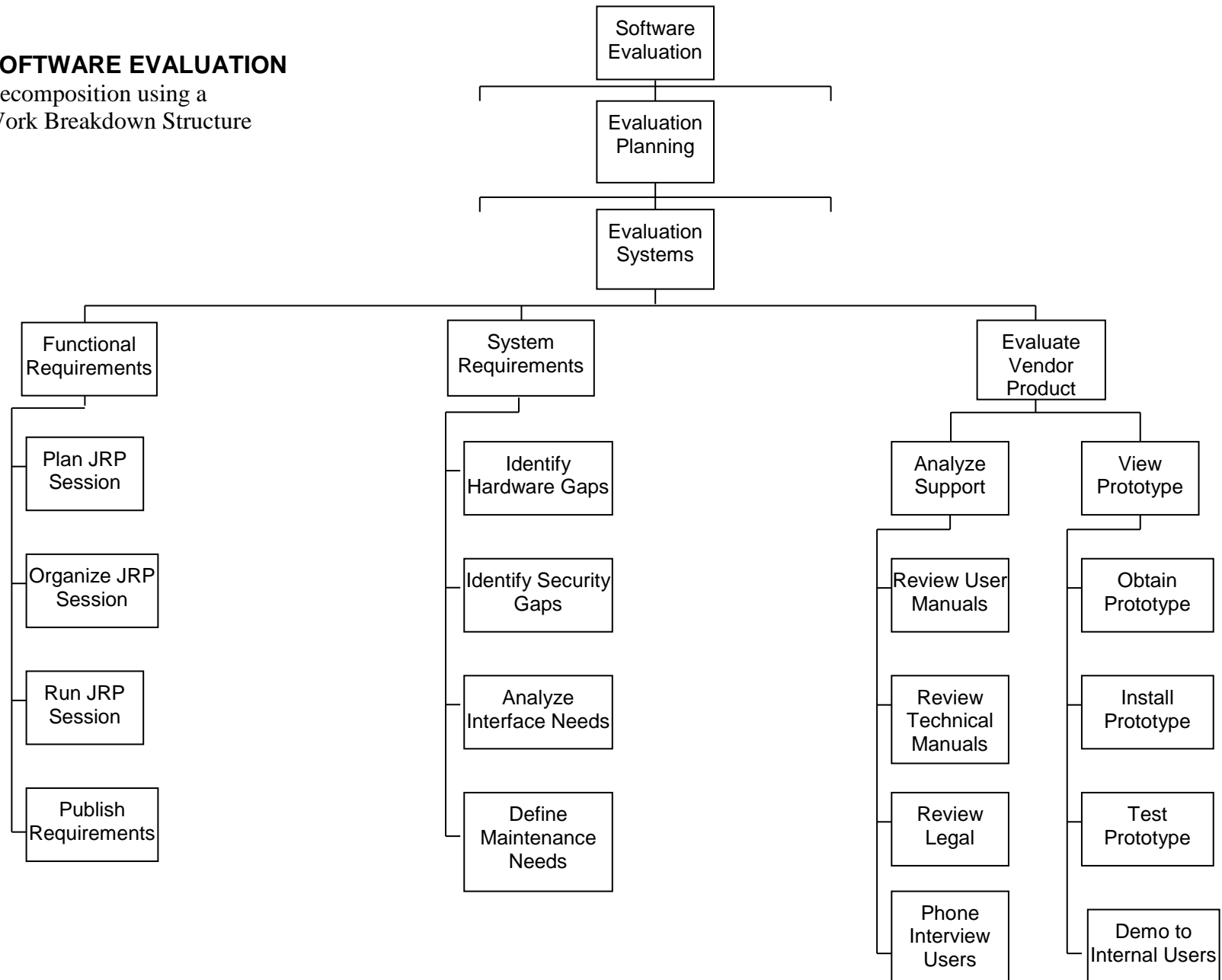
SOFTWARE EVALUATION

Decomposition using a
Work Breakdown Structure



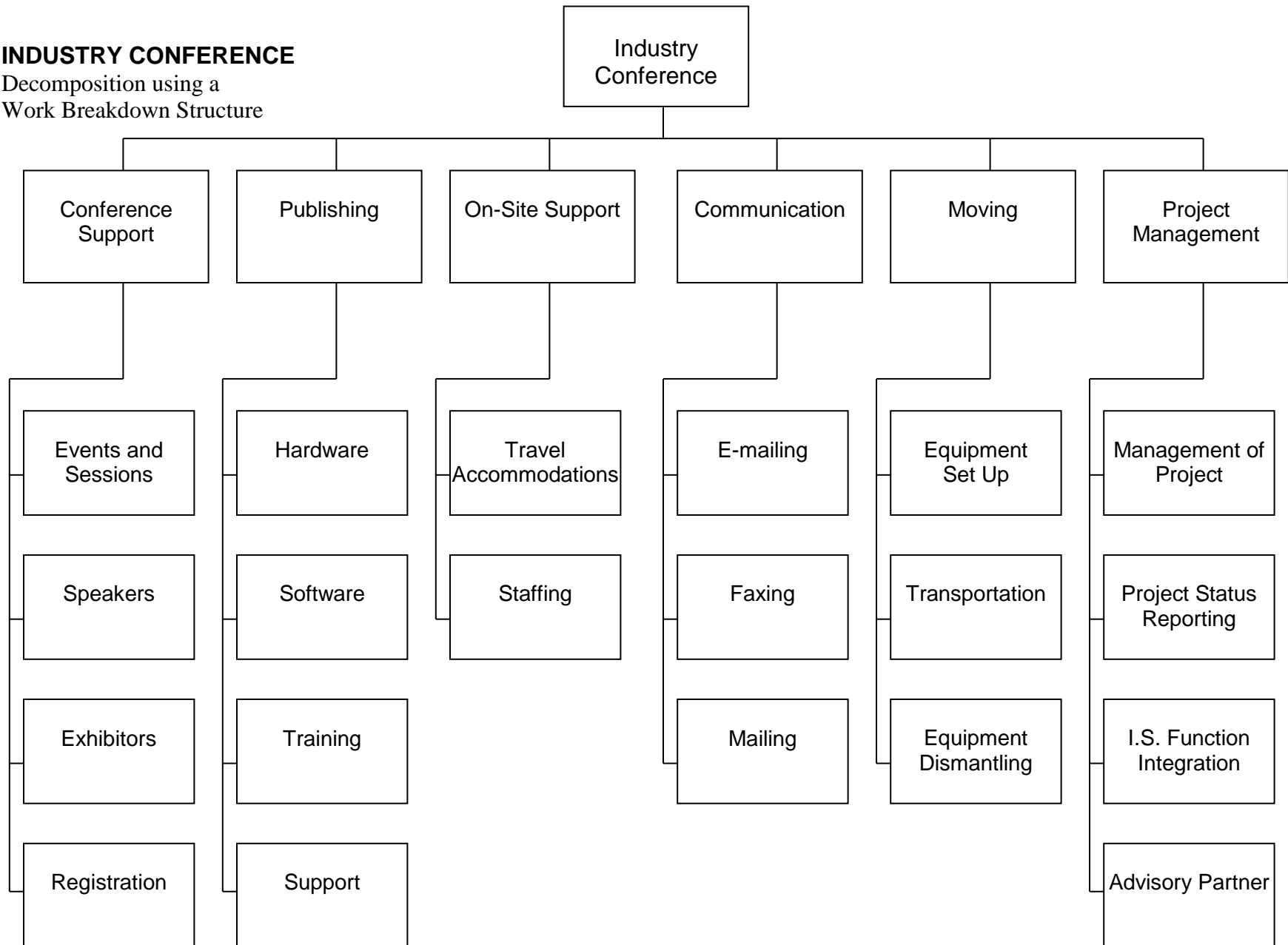
SOFTWARE EVALUATION

Decomposition using a
Work Breakdown Structure



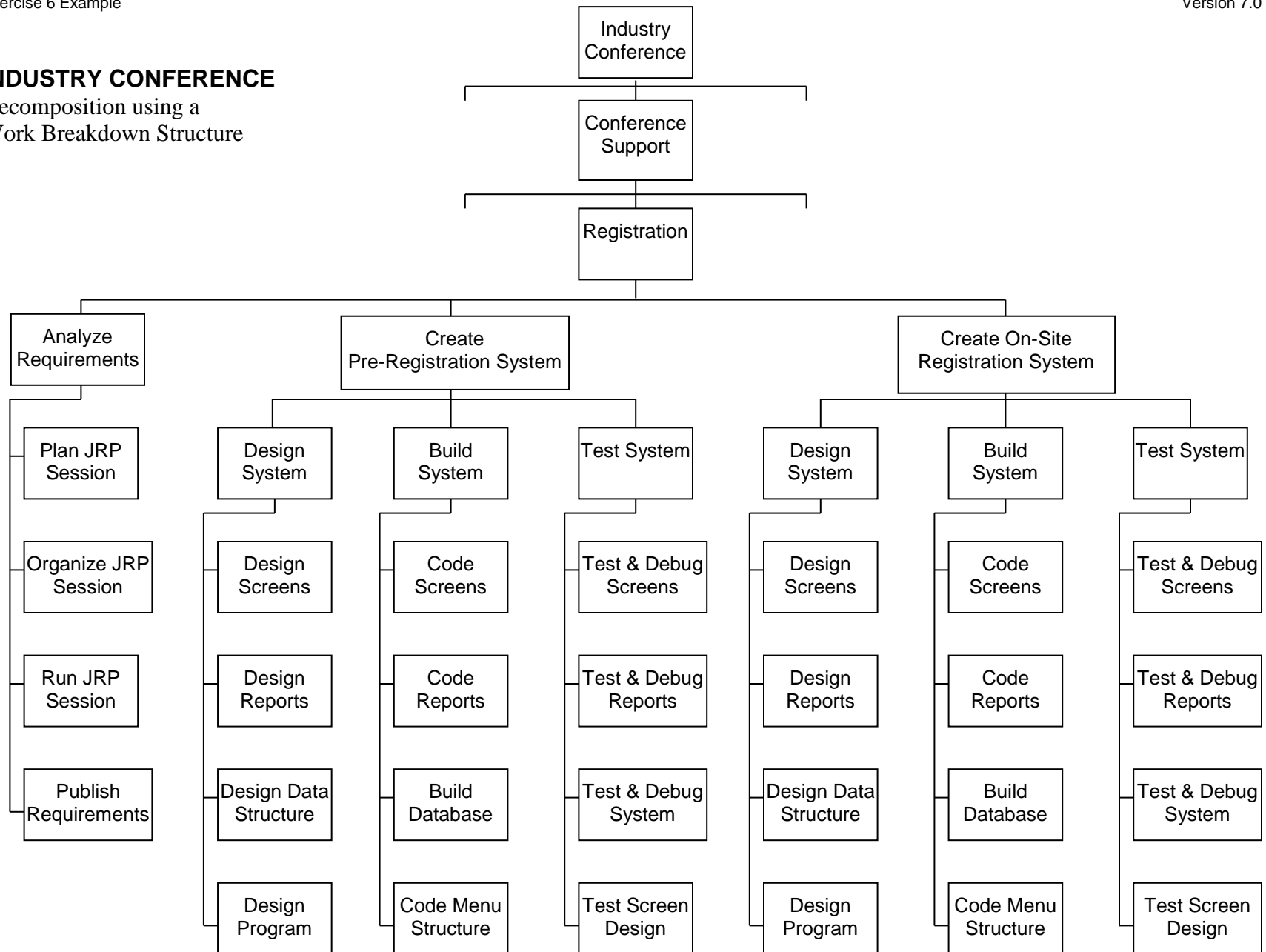
INDUSTRY CONFERENCE

Decomposition using a
Work Breakdown Structure



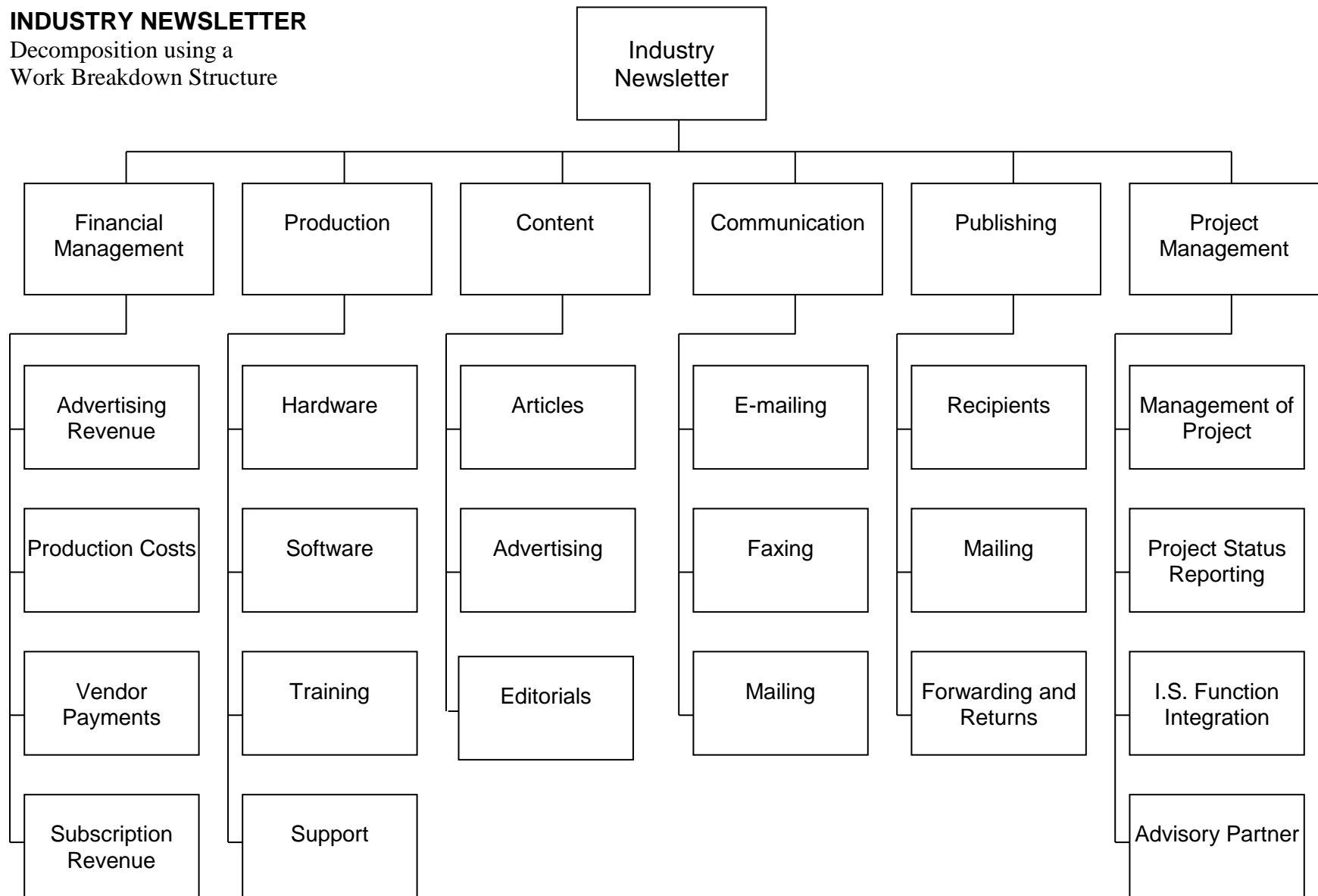
INDUSTRY CONFERENCE

Decomposition using a
Work Breakdown Structure



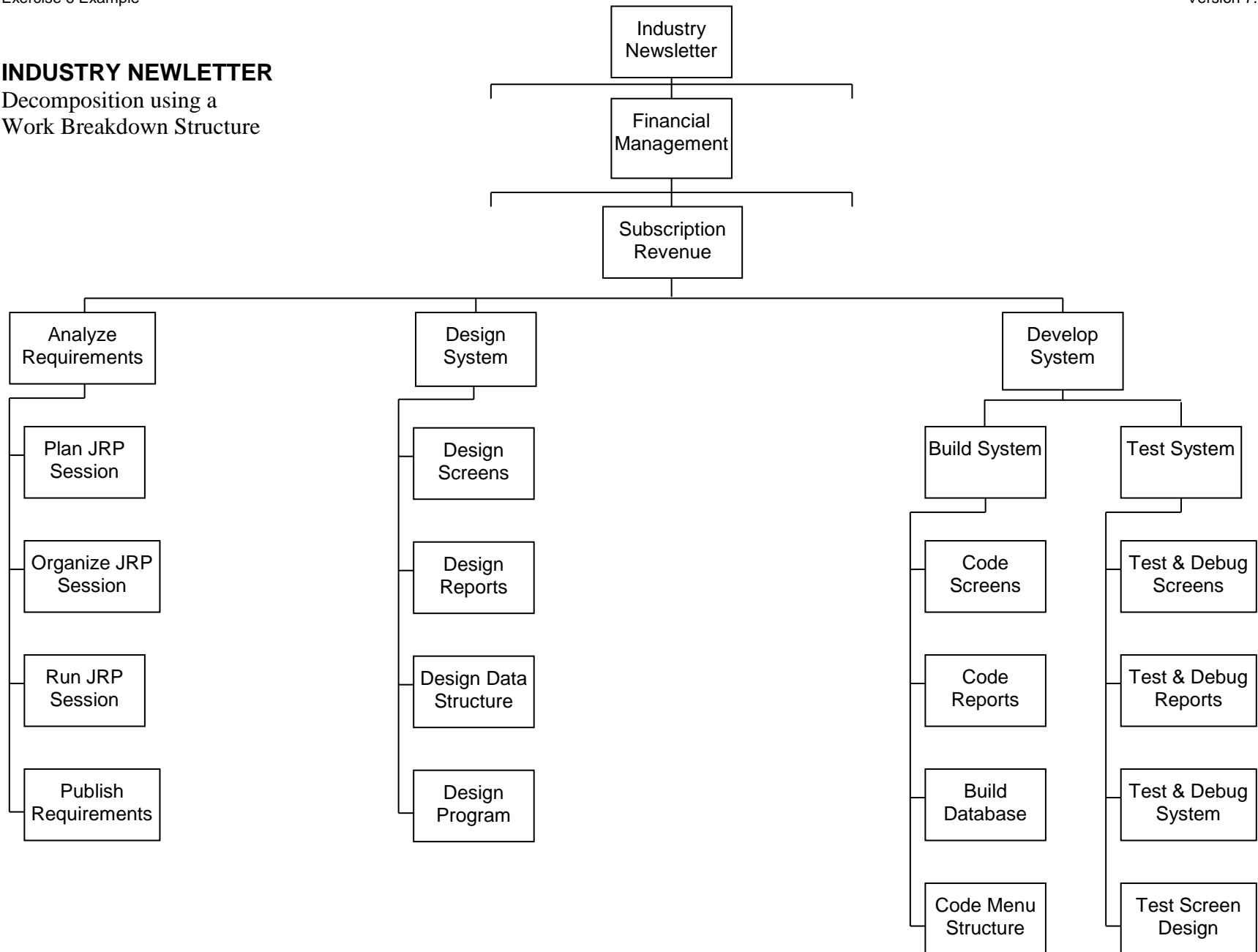
INDUSTRY NEWSLETTER

Decomposition using a
Work Breakdown Structure

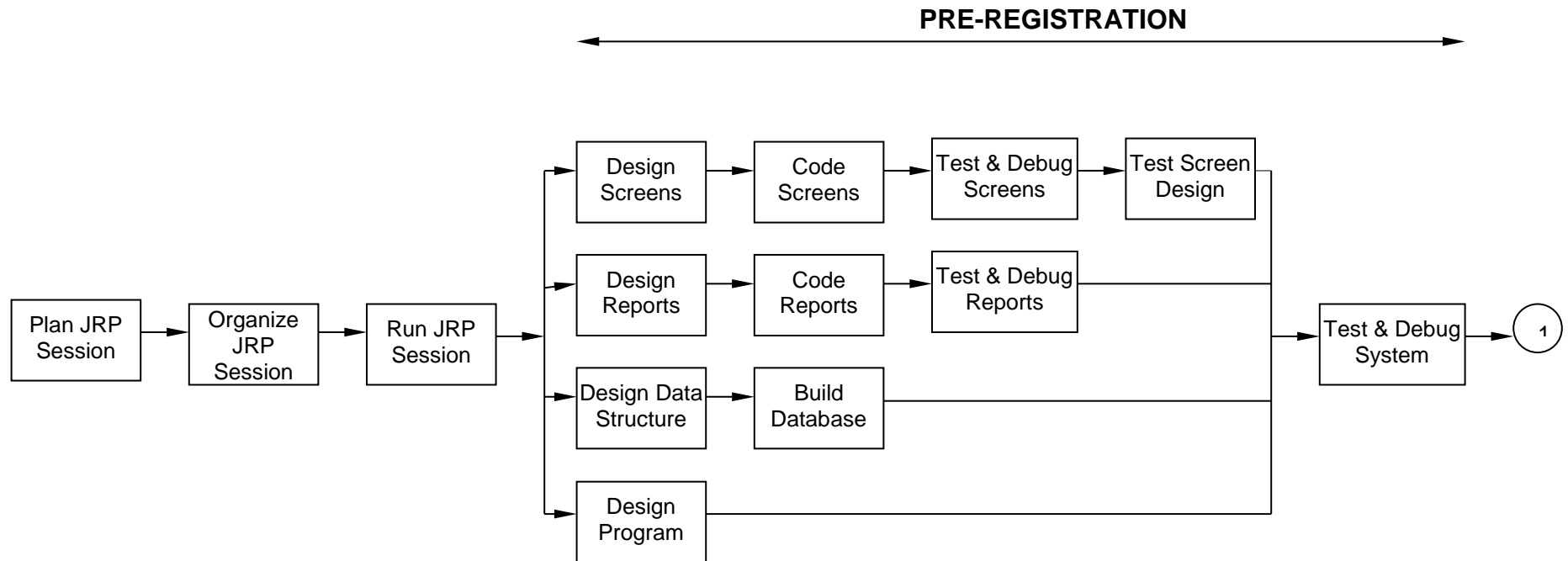


INDUSTRY NEWSLETTER

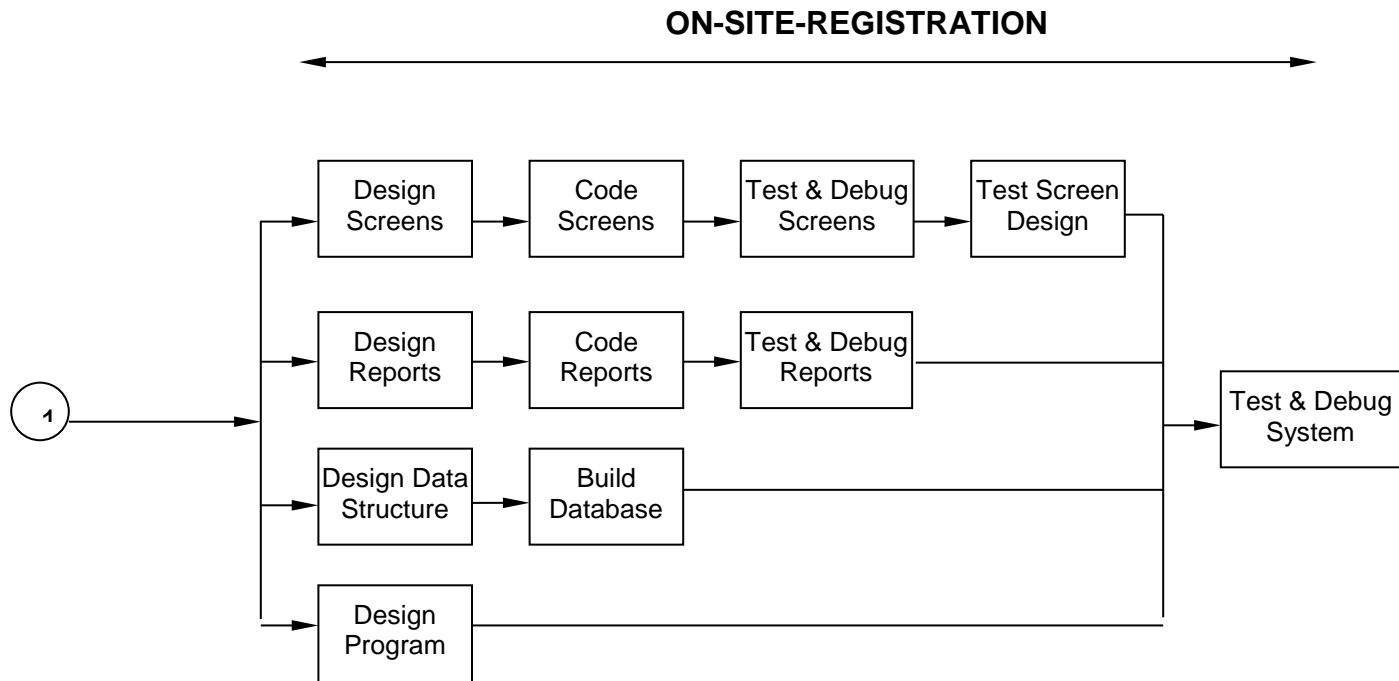
Decomposition using a
Work Breakdown Structure

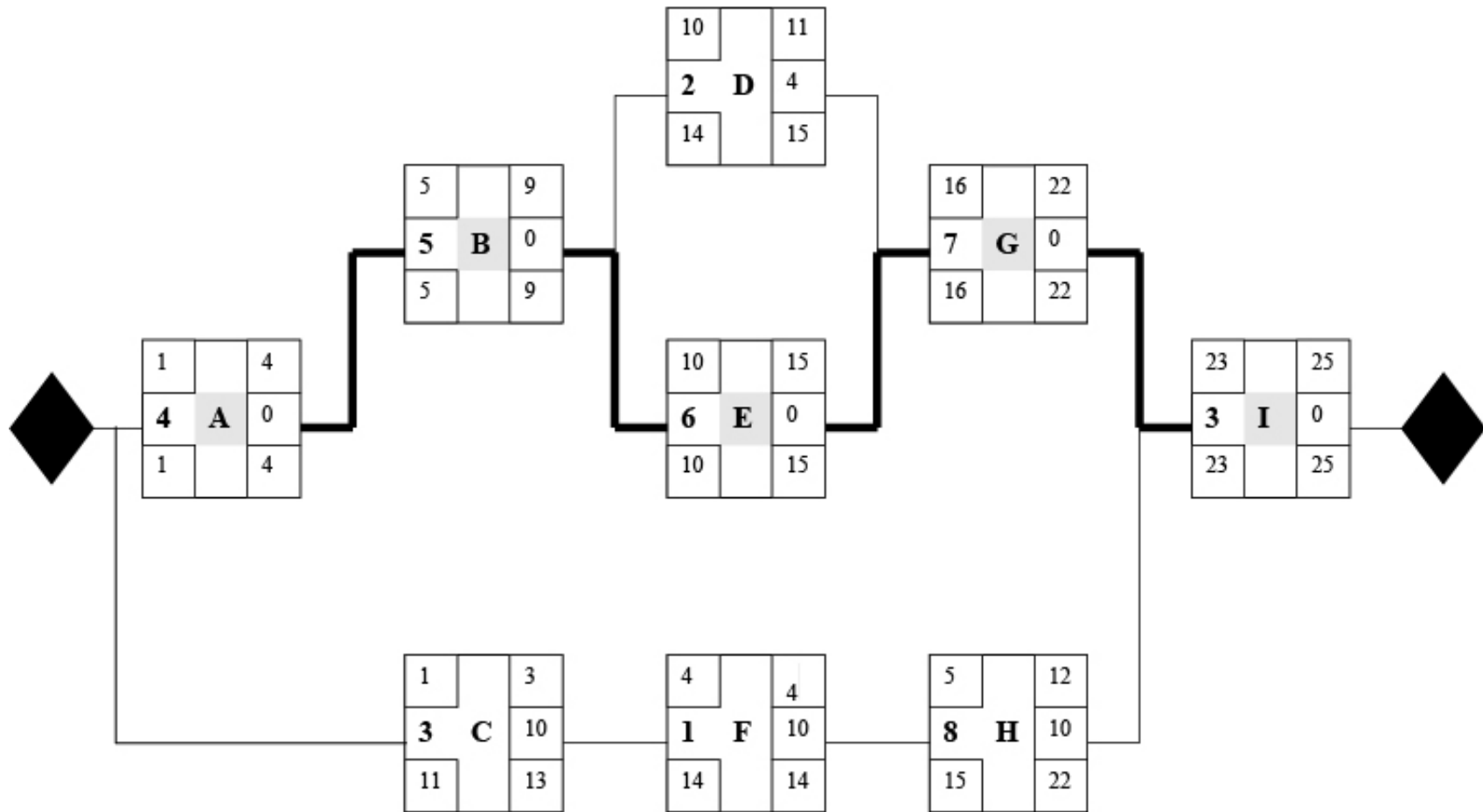


NETWORK DIAGRAM



NETWORK DIAGRAM





SCHEDULING WORKSHEET

[illegible]

INTERPRETING METRICS ANSWERS

Variances and Indexes: (+) is above 0 or 100%, (=) is at 0 or 100%, (–) is below 0 or 100%

1	Metric	Value	Explanation
	Project Completion	=	The project is still projected to finish by the original baseline completion date.
	Estimates at Completion (Hrs)	+	The team will spend more hours to complete the project than originally anticipated.
	Spend Plan (Hrs)	+	The team has spent more hours on the project to date than originally scheduled according to our spend plan.
	Performance to Estimate (Hrs)	+	<i>We underestimated. Tasks are taking longer to complete in actual effort than we thought they would.</i>
	Number of Tasks	=	The number of tasks in our project has not changed.

Looking at our Performance to Estimate in this example, were our hourly task estimates accurate (=), underestimated (+), or overestimated (–)?

In order for the project still to come in on schedule, the team must be spending more than their allocated number of hours on the project, which is why the Spend Plan is (+). This could mean the team is putting in overtime to still complete tasks by the baseline finish dates. Or it could mean that the team is sacrificing other scheduled work outside the project to put the time in on this project.

2	Metric	Value	Explanation
	Project Completion	–	<i>The team will finish the project earlier than the baseline finish date.</i>
	Estimates at Completion (Hrs)	=	The team will spend the same number of hours to complete the project that we originally anticipated.
	Spend Plan (Hrs)	+	The team has spent more hours on the project to date than originally scheduled according to our spend plan.
	Performance to Estimate (Hrs)	=	Our estimates have proven to be accurate.
	Number of Tasks	=	The number of tasks in our project has not changed.

Looking at the Project Completion in this example, will our team finish the project on time (=), late (+), or early (–)?

The team seems to be spending more time on the project than their original allocations. This is why the Spend Plan is (+). This could mean they are putting in overtime, or other scheduled work outside of the project is being sacrificed in order for the team to put in more time on this project.

3	Metric	Value	Explanation
	Project Completion	=	The project is still projected to finish by the original baseline completion date.
	Estimates at Completion (Hrs)	–	The team will spend fewer hours to complete the project than originally anticipated.
	Spend Plan (Hrs)	–	<i>The team has been working less than their allocated number of hours on the project per week.</i>
	Performance to Estimate (Hrs)	–	The team is taking fewer hours to complete their tasks than we estimated they would. In other words, we overestimated.
	Number of Tasks	=	The number of tasks in our project has not changed.

Looking at our Spend Plan in this example, has the team been working at their allocations (=), working more than their allocated hours (+), or less than our allocated hours (–)?

If we could get the team working at their allocations, we could finish early! But if the team's time is being spent on a higher priority project and finishing early wouldn't really matter to the organization (time is not the most important side of the triangle), we need to look at reducing their allocations within our schedule and re-project and baseline the project accordingly.

4	Metric	Value	Explanation
	Project Completion	+	The project will finish later than the baseline completion date.
	Estimates at Completion (Hrs)	+	The team will spend more hours to complete the project that we originally anticipated.
	Spend Plan (Hrs)	=	To date, the team has spent the number of hours on the project that we projected they would.
	Performance to Estimate (Hrs)	+	<i>We underestimated. Tasks are taking longer to complete in actual effort than we thought they would.</i>
	Number of Tasks	=	The number of tasks in our project has not changed.

Looking at the Performance to Estimate in this example, were our hourly task estimates accurate (=), underestimated (+), or overestimated (–)?

It may be worthwhile to look at all future task estimates, adjust accordingly, and set a new baseline through formal corrective action change control.

Explain why the following situations can exist.

5	Metric	Value	Answer
	Project Completion	(=)	<i>Because the Spend Plan (Hours) is down, tasks would not be finishing on time. The project's completion can be on target if the tasks that are slipping are not on the critical path. Eventually, the resource availability would have to go up in order to not slip the end date.</i>
	Estimates at Completion (Hours)	(=)	
	Spend Plan (Hours)	(-)	
	Performance to Estimate (Hours)	(=)	
	Number of Tasks	(=)	

6	Metric	Value	Answer
	Project Completion	(+)	<i>Because the Performance to Estimate (Hours) is up, it means we underestimated. Therefore, the Estimate at Completion (Hours) would also be up and the Project Completion would move out, given the number of tasks has not changed.</i>
	Estimates at Completion (Hours)	(+)	
	Spend Plan (Hours)	(=)	
	Performance to Estimate (Hours)	(+)	
	Number of Tasks	(=)	