



Project Manager's Playbook

INNOVATE VANCOUVER



PROJECT PLANNING OVERVIEW

In a work of increasingly complex interactions and business models the need for a standardized approach to managing projects has never been greater. The benefits of businesses building their own Project Management Office (PMO) will depend on whether the business culture, leadership team, and project processes, tools, and goals are aligned.

Although there are project management standards that can be applied to every project each of these must be individually applied to meet the needs of each unique project. This means that there is no 'one size fits all' approach to project management and that the team needs to understand both the unique needs of the project as well as how to wield each tool in order to be successful.

A big project involves overseeing a lot of moving parts, oftentimes from different people. To have a successful rollout, project managers rely on a well-crafted project plan to ensure objectives are met on time and on budget.

A project plan is a formal approved document which is used to define project goals, outline the project scope, monitor deliverables, and mitigate risks. It must answer basic questions like what is the purpose of the project, what activities are involved, who will be responsible for what, and when is it expected to be completed?



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'The Project Management
Blueprint,' available on
Amazon:

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THE FIVE PROCESS GROUPS

The project lifecycle includes five process groups. Although work may continue across each of these process groups throughout the project, referencing the lifecycle supports:

- * Initiation:
- * Planning:
- * Execution:
- * Monitoring & Control:
- * Closeout:

Initiation sets the vision of what is going to be accomplished. Planning helps establish the scope, schedule, roles, and requirements for the project. Execution is where the work starts, working groups meeting, and roles are implemented.

Monitoring & Controlling involves the process, tools, and metrics used to insure the project meets performance specifications. Whereas closeout involves the processes, tools, and strategies for closing out the project and/or transferring the completed deliverables to the customer.

Your project structure will often vary depending on the type of project, but it is always advised to consider the project lifecycle when designing your project plan, schedule, and assigning roles & resources.



THE TEN KNOWLEDGE AREAS

The Project Management - Knowledge Areas represent competencies used for most projects.

A Knowledge Area represents a complete set of concepts, terms, and activities that make up professional field, project management field, or area of specialization. These ten Knowledge Areas emphasize different competencies across the project.

PMBOK (6.0) includes 10 knowledge areas:

- Project Integration Management
- Project Scope Management
- Project Schedule Management
- Project Cost Management
- Project Quality Management
- Project Resource Management
- Project Communications Management
- Project Risk Management
- Project Procurement Management
- Project Stakeholder Management

These 10 knowledge areas are used across the project lifecycle.

When working on a project it is often useful to ask 'are we considering all of the knowledge areas in the project plan?'

Not all knowledge areas are used for 'every single' project (procurement management, for example), yet it remains useful to consider the list when evaluating your project plan for completeness.

Different schedule structures are available depending on the deliverables emphasized: Waterfall, WaterScrumFall, Agile, DevOps, etc. These include additional knowledge areas as well.

The knowledge areas are not limited to any one specific project process group. They are used throughout the lifecycle.



EVALUATING PERFORMANCE

HAVING CRITERION FOR EVALUATING PROJECT PERFORMANCE IS CRUCIAL. WITHOUT THIS CRITERION, RISKS AND OPPORTUNITIES ARE UNLIKELY TO BE PROPERLY MANAGED. RISKS WILL UNDERMINE PROJECT PERFORMANCE AND OPPORTUNITIES FOR IMPROVEMENT WILL BE MISSED.

Key Performance Indicators (KPI) are used to evaluate ongoing projects. The KPI's used will depend on the goals and will often vary per industry, project type, and customer requirements & specifications. The following five KPI's can be broken down into additional KPI's as illustrated below:

1. Efficiency: Speed, Budget Utilization, Cost Avoidance, Responsiveness
2. Engagement: Customer, Stakeholder, Project Manager, Project Sponsor
3. Benefits: Revenue Realized, Capability, Quality, Innovation
4. Inefficiency: Response Time, Cost, Cycle Time, Rework
5. Costs: Redundancy, Low-Value Projects, Risk, Defects

Source:

Strategic PMOs Plan a Vital Role in Driving Business Outcomes:(Rep.). (2013). Forrester Research.



STEP BY STEP GUIDE TO PROJECT PLANNING

The following guide can be used regardless your team's project approach.

Step 1: Establish the vision for the project, ensuring it is aligned with your company's strategic plan. Validate the project's business case.

Step 2: Gather the requirements for the project. This involves meeting with all primary stakeholders to understand what the project deliverables are to achieve.

Step 3: Identify the schedule, roles, and resources that will be needed to carry out the plan. Make sure you have the information, tools, and subject matter expertise to ensure the project is successful.

Step 4: Implement the schedule, making sure all stakeholders are

informed of process & have the information they need to make decisions throughout the project lifecycle.

Step 5: Establish metrics for evaluating the project progress & performance. Use these metrics to identify strategies to keep the project on schedule, on budget, and within scope.

Step 6: Celebrate successes and reinforce lessons learned.

Step 7: Establish a formal process for managing risk, scope change, and resistance.

Step 8: Conduct additional training, workshops, and consultation events (as needed) to ensure the 'solution' delivered by the project is still relevant.

Waterfall, in project management, involves a sequential process where all requirements are known in advance.



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THE PROJECT MANAGEMENT OFFICE

A Project Management Office (PMO) helps strengthen business alignment across the enterprise and supports flexibility in response to changing project conditions.

Building a PMO requires executive buy-in and leadership. In order to be successful, executives will need to both develop and drive the following initiatives:

1. Create a clearly defined strategic vision: Businesses succeed when they deliver the right initiatives at the right time.
2. Drive business success through consistent delivery practices: Businesses experience sustained growth through consistent practices that control risk and increase productivity.
3. Enable the organizational change needed for growth: Strong PMO leaders understand that cultural change is difficult in the best of circumstances and that through communication, which includes both education and evangelism; they build buy-in for greater discipline and accountability.
4. Playing an active role in brand ownership: Strategically aligned PMOs view the strength of the support they provide as directly affecting their company's brand.



PROJECT MANAGEMENT BLUEPRINT

A formal Project Management approach can strengthen your company's ability to effectively deliver projects, manage costs, mitigate risks, and leverage opportunities for innovation.

The Project Management Blueprint (2nd Edition, 2019) is available on Amazon.

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