AC   **Alex Criswell**

Project Management

CUSTOMER
SERVICE
INC.

Introduction to Project Management

START HERE

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UNIT I: DEFINING A PROJECT

Definition of a Project

Overview of a Project

Examples of Projects

Course Overview

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Welcome to the Project Management course!

This course is an introduction to Project Management and its essentials. By the end of this module, you will have a solid knowledge about managing a project and how to turn a plan into a success like a pro.

Course Outcome and Objectives

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Course Outcome

By the end of this course, learners will be able to explain the project management process while using a variety of tools to complete a project.

Course Objectives

By the end of this course, learners will be able to:

- Define a project.

- Identify examples of projects.

- Summarize the Project Management process.

- Explain the five cycles the Project Management lifecycle.

- Use a project management checklist to complete a project.

CONTINUE

What to Expect

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Expectations

Included in this course, you will find content and resources regarding project management.
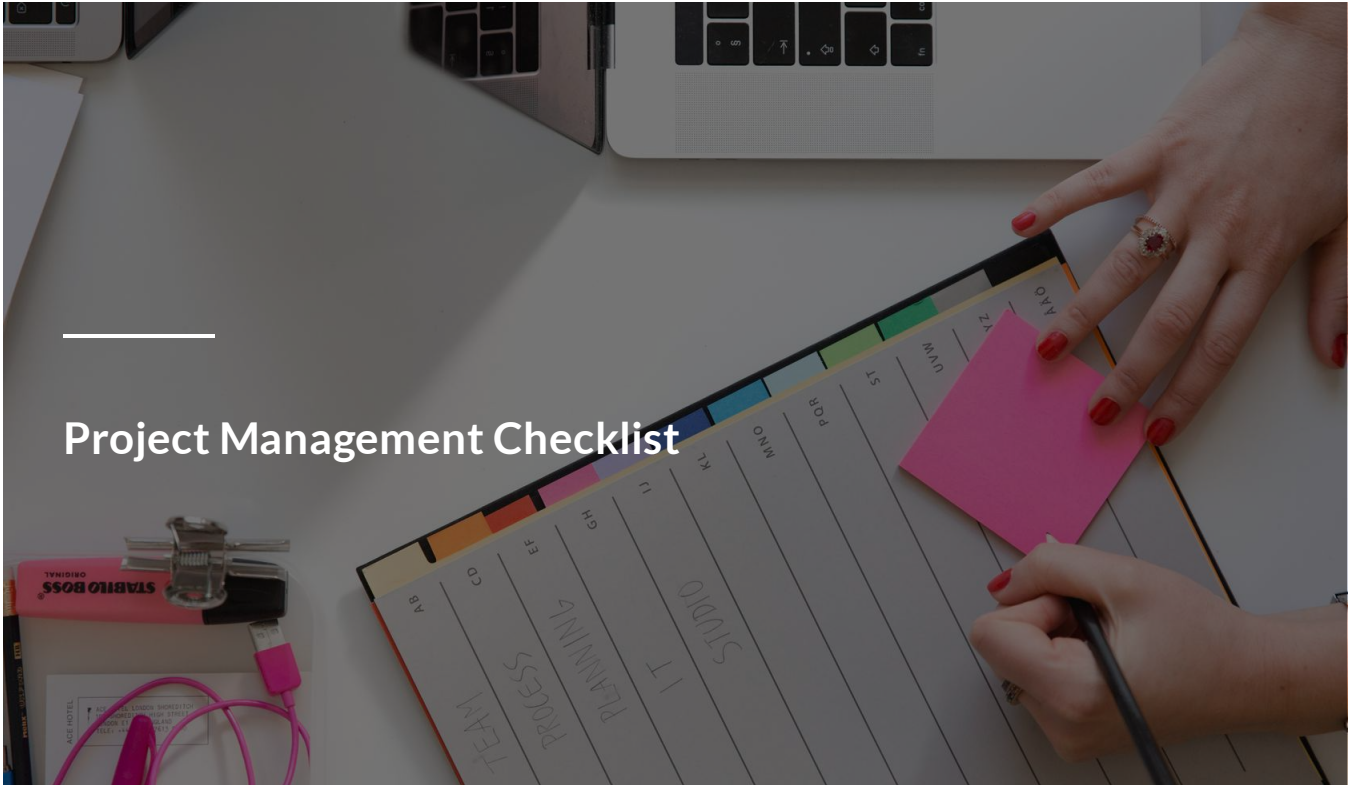
Units

This course is divided into units as follows:

Defining a Project

Project Management Overview

Project Management Checklist

CONTINUE

Definition of a Project

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## What is a Project?

A project is a temporary endeavor designed to produce a unique product, service or result with a defined beginning and end undertaken to meet unique goals and objectives, typically to bring about beneficial change or added value. The end is reached when the project's objectives have been achieved or when the project is terminated because its objectives will not or cannot be met,

or when the need for the project no longer exists. A project may also be terminated if the client (customer, sponsor, or champion) wishes to terminate the project.

Discover More

Review the following video titled **Introduction to Project Management** for more information on projects and project management.
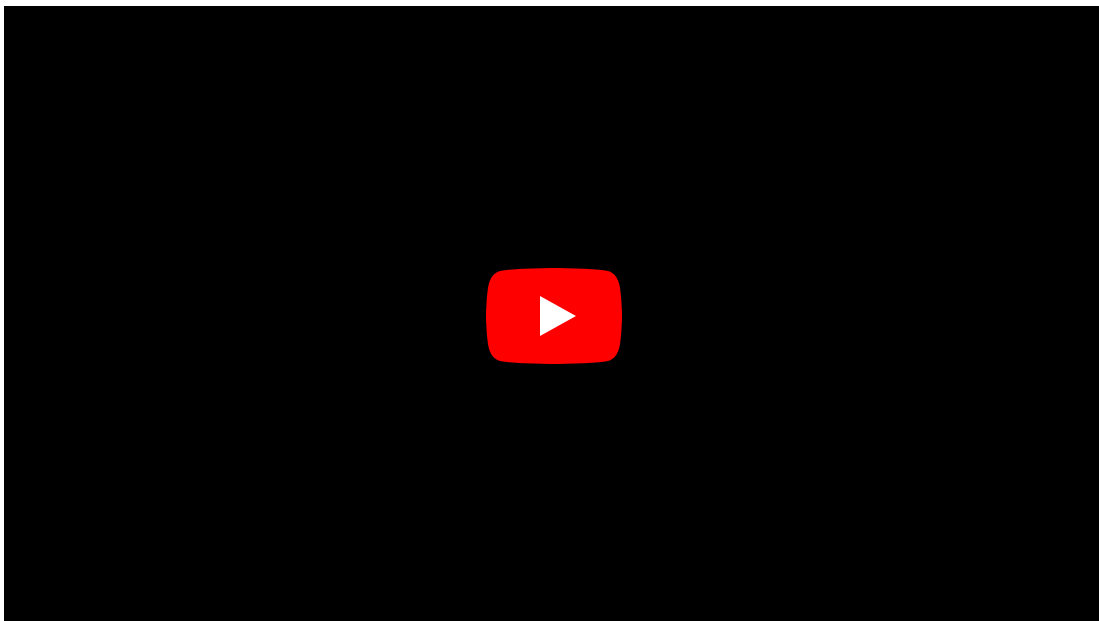
Introduction to Project Management

KNOLSKAPE (https://www.knolskape.com/) is a global Top 20 gamification company focusing on talent transformation. Using experiential learning products, KNOLSKAPE helps organizations attract, grow and retain talent. Global Fortune 500 companies, Top-10 B-schools and leading HR consulting / training companies use KNOLSKAPE's gamification and simulation products and solutions for on-boarding, training, assessments, and talent engagement.

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Overview of a Project

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Project Overview

Every project creates a unique product, service, or result. The outcome of the project may be tangible or intangible.

What a Project Can Create

A project can create:

- A product that can be either a component of another item, an enhancement of an item, or an end item in itself;

- A service or a capability to perform a service (e.g., a business function that supports production or distribution);

- An improvement in the existing product or service lines (e.g., A Six Sigma project undertaken to reduce defects);

- A result, such as an outcome or document (e.g, a research project that develops knowledge that can be used to determine whether a trend exists or a new process

will benefit society).

CONTINUE

Examples of Projects

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Project Examples

Examples of projects include, but are not limited to:

- Developing a new product, service, or a result;

- Effecting a change in the structure, processes, staffing, or style of an organization;

- Developing or acquiring a new or modified information system (hardware or software)

- Conducting a research effort whose outcome will be aptly recorded;

- Constructing a building, industrial plant, or infrastructure; or

- Implementing, improving, or enhancing existing business processes and procedures.

Discover More

Review the following resource from Caravel to read about examples of projects.

CONTINUE

Definition of Project Management

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What is Project Management?

Project management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

Project management is the practice of:

1) initiating,

2) planning,

3) executing,

4) controlling, and

5) closing the work of a team to achieve specific goals and meet specific success criteria at the specified time.

CONTINUE

Overview of Project Management

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Primary Challenge

The primary challenge of project management is to achieve all of the project goals within the given constraints. This information is usually described in project documentation, created at the beginning of the development process.

Focus

The object of project management is to produce a complete project which complies with the client's objectives. In many cases, the objective of project management is also to shape or reform the client's brief to feasibly address the client's objectives. Once the client's objectives are clearly established they should influence all decisions made by other people involved in the project – for example, project managers, designers, contractors and sub-contractors.

Managing a Project

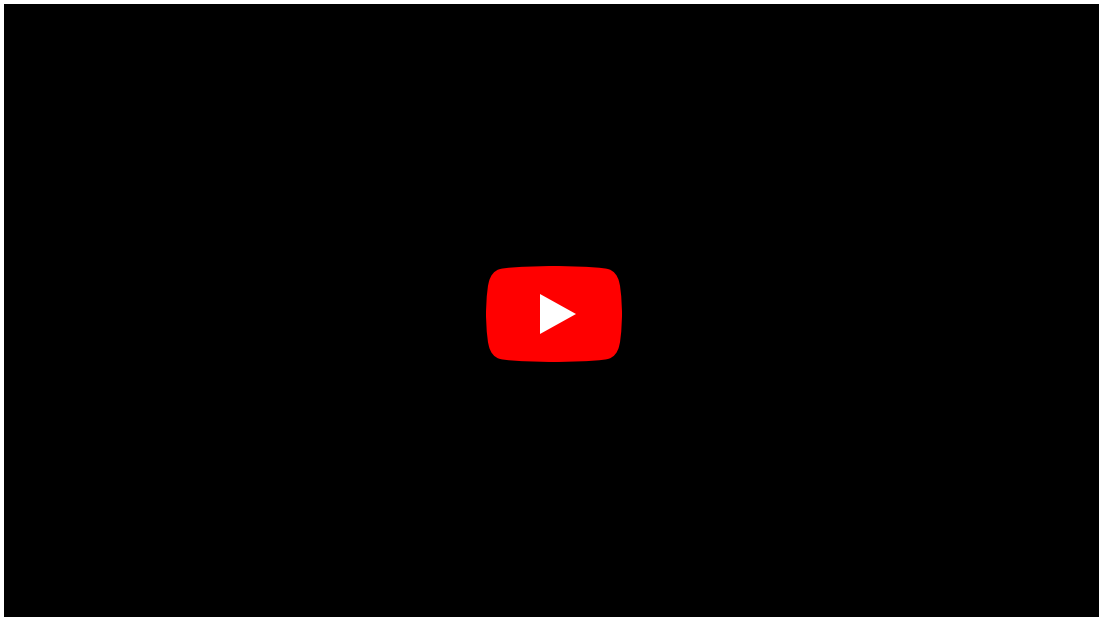Managing a project typically includes, but is not limited to:

- Scope,

- Quality,

- Schedule,

- Budget,

- Resources, and

- Risks

Discover More

Review the video titled **What is Project Management? Training Video** for more information regarding Project Management.

What is Project Management? Training Video

Get the PPT slides at https://changeactivation.com/project-management-slides/ Download the video at https://changeactivation.com/project-management/ Project management explained simply is a quick and straightforward training video to help newcomers understand the PM concepts including the time, cost and quality constraints.

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CONTINUE

Project Management Process

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Project Management Lifecycle Process

A process is a set of interrelated actions and activities performed to create a pre-specified product, service, or result. Each process is characterized by its inputs, the tools and techniques that can be applied, and the resulting outputs.

Project Manager Needs

The project manager needs to consider organizational process assets and enterprise environmental factors. These should be taken into account for every process, even if they are not explicitly listed as inputs in the process specification. Organizational process assets provide guidelines and criteria for tailoring the organization's processes to the specific needs of the project.

Project Success

In order for a project to be successful, the project team should:

- Select appropriate processes required to meet the project objectives.

- Use a defined approach that can be adapted to meet requirements.

- Establish and maintain appropriate communication and engagement with stakeholders.

- Comply with requirements to meet stakeholder needs and expectations.

- Balance the competing constraints of scope, schedule, budget, quality, resources, and risk to produce the specified product, service or result.

Project Processes

The project processes are performed by the project team with stakeholder interaction and generally fall into one of two major categories. Click through the tabs to learn more.

PROJECT MANAGEMENT PROCESSES	PRODUCT-ORIENTED PROCESSES

These processes ensure the effective flow of the project throughout its life cycle. These processes encompass the tools and techniques involved in applying the skills and capabilities described in the knowledge areas.

PROJECT MANAGEMENT PROCESSES	PRODUCT-ORIENTED PROCESSES

These processes specify and create projects product. Product-oriented processes are typically defined by the project life cycle and vary by application area as well as the phase of the product life cycle. The scope of the project cannot be defined without some basic understanding of how to create the specified product.

Project Shortfalls

When a project is poorly navigated and falls short of budget and timeline goals, it can cost you more than just money' it can cause irreparable damage to reputation, confidence, and client trust. The answer isn't just dedicated project managers, but instilling your entire team at every level with project management abilities.

CONTINUE

Project Management Lifecycle

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Life Cycle of Project Management

Click through each of the tabs for more information on each of the areas of the life cycle.

Initiate   —

- Identify a project's stakeholders.
- Establish clear and measurable project outcomes.
- Create a well-defined project scope statement

Plan   —

- Identify, assess, and manage project risks.
- Create a realistic and well-defined project schedule.

Execute   —

- Hold team members accountable for project plans.

- Conduct consistent team-accountability sessions.

Monitor & Control   __

- Create a clear communication plan around the project that includes regular project status reports and project changes.
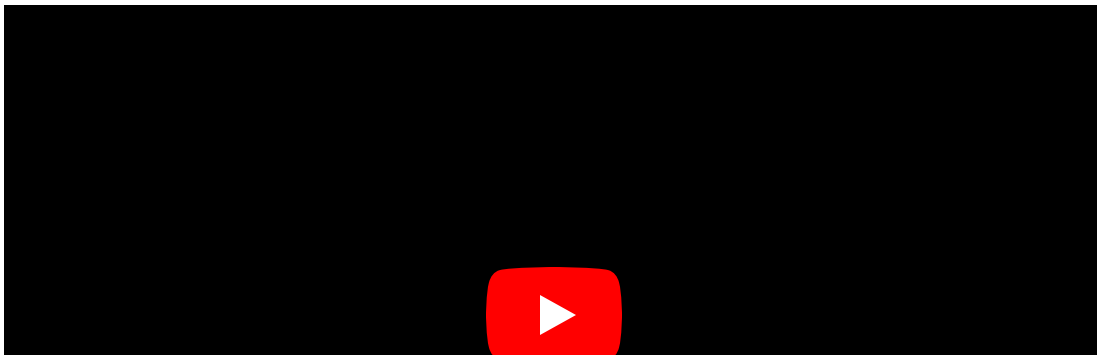
Close   __

- Reward and recognize the contributions of project team members.
- Formally close projects by documenting lessons learned

Discover More

Below is a video explaining the 5 cycles of project management titled **The Project Management Life Cycle**.

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## The Project Management Life Cycle

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CONTINUE

Project Checklist

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Checklist

Project checklists are useful and considered crucial in identifying the needed resources in a project. It also serves as a maintenance tool when you are bombarded with too many tasks that are looming on their deadlines. When you have an organized list of things to do and priorities to take into account, your workflow will be much easier and frantically running back and forth on what task to tackle first is not an option.
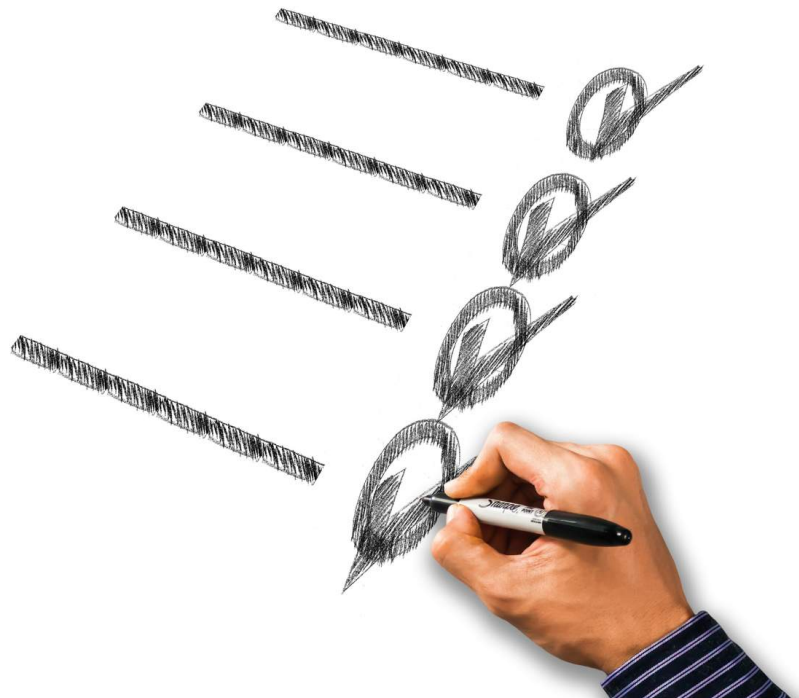
It's a given that once you create a checklist, you have a clear vision of what you're supposed to do. For project checklists, it's more than identifying the tasks, but the objectives of the project as well. You don't limit your project checklist on your designated tasks, but rather you have to extend that reach to your team and the progress of the project.

Project Management Checklist

A very informative and common list on how to create a project management checklist is detailed in this unit in further sections.

CONTINUE

Understanding Your Role

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Understand Your Role

Having a clear understanding of your role is an important pillar of a successful project. Even if it isn't documented on paper, it will help you ensure that all stakeholders are considered and that you're aware of your responsibilities in case issues arise.

CONTINUE

Identify the Stakeholders

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Identify the Stakeholders

A project is successful when it has met the expectations of all stakeholders. A stakeholder can be anybody directly or indirectly impacted by the project. It is not always easy to determine the project's stakeholders, particularly those affected indirectly. A stakeholder could be:

- The client

- The project manager

- The project teams

- Consultants

Discover More

Review the following video titled **How To Get Project Stakeholders on Your Side** for more information on Project Management stakeholders.
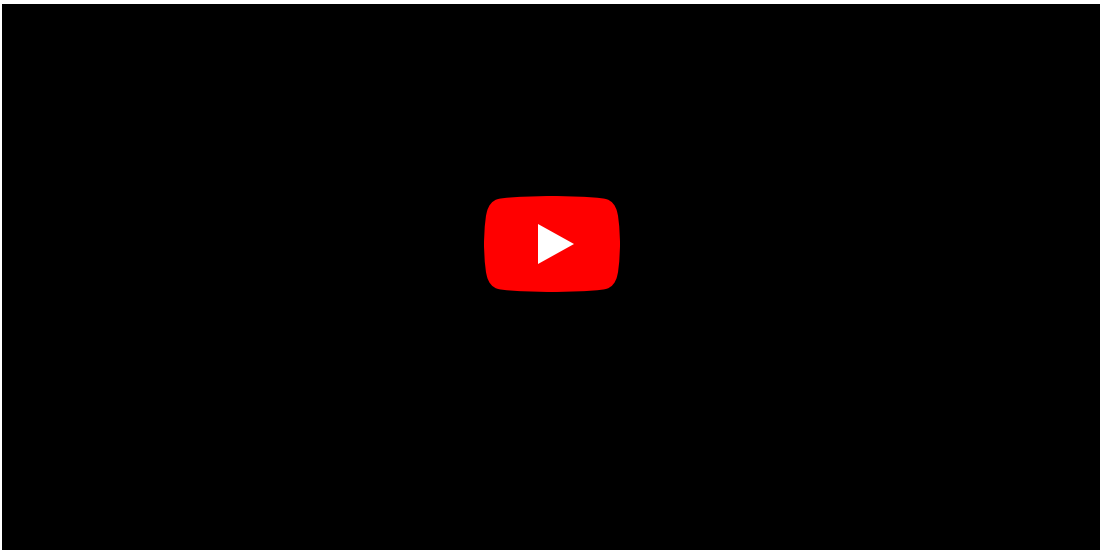
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Stakeholders are the owners of the project. Try our award-winning PM software for free: https://www.projectmanager.com/?utm_source=youtube&utm_medium=video&utm_campaign=HowToGetProjectStakeholdersOnYourSide Watch this video to learn from an expert how to get project stakeholders on your side.

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CONTINUE

Write a Project Plan

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Write a Project Plan

Now you've gathered enough information to start planning the project. Use whatever project planning tool that works for you, be it Trello, Scoro, or even a simple spreadsheet.

Some tools are more comprehensive than others, but a rock-solid project plan can be achieved in any solution as long as it helps you to formalize your thoughts and keep consistency

CONTINUE

Set Goals

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Set Goals

The first step in creating any project plan is setting achievable goals. Meet with the stakeholders and discuss the possible outcomes. Turn the output into a comprehensive list and prioritize the needs. A good technique for doing this is reviewing them against the SMART principle.

SMART Goals

The acronym SMART has several slightly different variations, which you can modify depending on your project. Click on each of the tabs to learn more.

S   —

S – specific, significant

M   —

M – measurable, motivational

A _

A – agreed upon, attainable, action-oriented

R _

R – realistic, relevant, rewarding, results-oriented
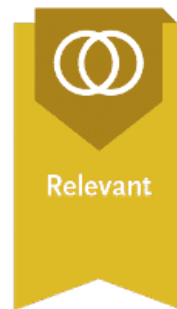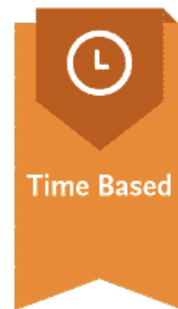
T _

T – time-bound, tangible, trackable

SMART

Specific   Measurable   Attainable   Relevant   Time Based

Create a Vision

From the smaller goals, create a wider vision statement. Without a strong, shared vision, it's hard to gather the momentum needed to get the project off the ground.

The vision statement should explain what the project is hoping to achieve in a few details:

- Where does the project fit with the overall business strategy?

- What will be the project's outcome?

- How will the project benefit the stakeholders?

CONTINUE

Develop a Budget

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Develop the Budget

A project budget is a detailed, time-based estimate of all the costs for your project. You typically develop a budget in phases – from an initial estimate to a detailed version to the final approved project budget.

Starting a Project

When starting a project, it is difficult to know how much it will eventually cost – and with so much uncertainty in projects, it can be one of the project manager's greatest challenges.

Your project budget will be made up of different direct and indirect costs, with a small amount assigned for contingency reserve.

Once you have an idea of how long a project is going to take and how much resources you need, you can calculate the approximate total for the direct and indirect costs.

Determine the Direct Costs

These costs are directly attributed to the project and charged on an item-by-item basis.

- Labour (people) costs

- Consultant fees

- Raw material costs

- Software licences

- Travel costs

Determine the Indirect Costs

These costs signify resources that benefit more than one project, and only a proportion of their total cost is charged to the project.

- Telephone charges

- Office space rent

- Office equipment costs

- General administration costs

- Company insurance costs

Add the Contingency Reserve

Don't forget to reserve a buffer for your project to cover risks – the contingency reserve. Usually, it's a percentage of the total project cost and time.

CONTINUE

Create a Resource Allocation Plan

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Create a Resource Allocation Plan

An organization's resources include people, equipment, materials, knowledge, and time. Find out what resources are available for the project, now and in the future. A resource allocation plan is an important tool in the effective management of scarce resources.

Describe the type of resources needed and the timing of that need. As the project schedule changes, the resource plan must be flexible enough to adjust as these alterations occur.

Resource Plan

A Resource Plan will help you to:

- Identify the number of resources required per project activity

- Plan the timeline for using or consuming these resources

- Create a detailed resource utilization schedule

CONTINUE

Establish the Deliverables

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Establish the Deliverables

Using the previously defined goals, create a list of things the project needs to deliver to meet those goals. Simply put – tasks and subtasks. Specify when and how to deliver each item.

Add notes to tasks that might seem confusing or need an explanation. It never hurts to add detail!

Discover More

Review the following video titled **What are Project Deliverables - Project Management** for more information on Project Management stakeholders.
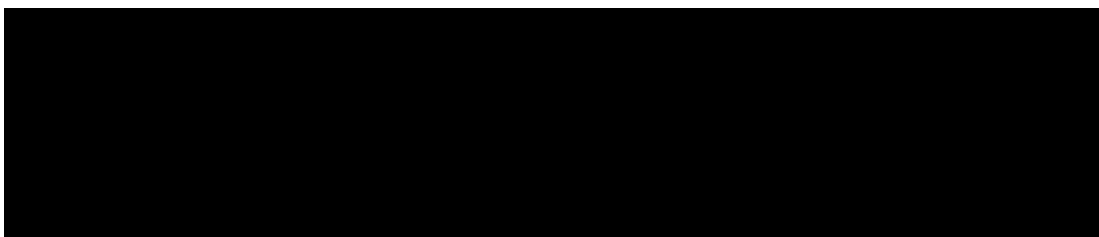
G **YOUTUBE**

What are Project Deliverables - Project Management

What are project deliverables, and what role do they play in PM processes? Try our Award-Winning PM Software for free: https://www.projectmanager.com/?utm_source=youtube&utm_medium=video&utm_campaign=WhatAreProjectDeliverables Jennifer Bridges, PMP, explains Project Management 101 - Project Deliverables. Project deliverables are the output of a team to guide towards the successful completion of that project.

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CONTINUE

Create a Timeline

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Create a Timeline

Create a list of tasks that need to be carried out for each identified deliverable. For each task, determine the following:

- The amount of effort (hours, days, etc.) required for completing the task

- The responsible person who will carry out the task

Once you have established the amount of time needed for each task, you can work out the effort required for each deliverable, and delivery date.

Use Project Planning Software

At this point in the planning, you can use project planning software such as Scoro, Wrike, MS Project or any of your choosing, to create your project schedule. Alternatively, use one of the many free templates available.
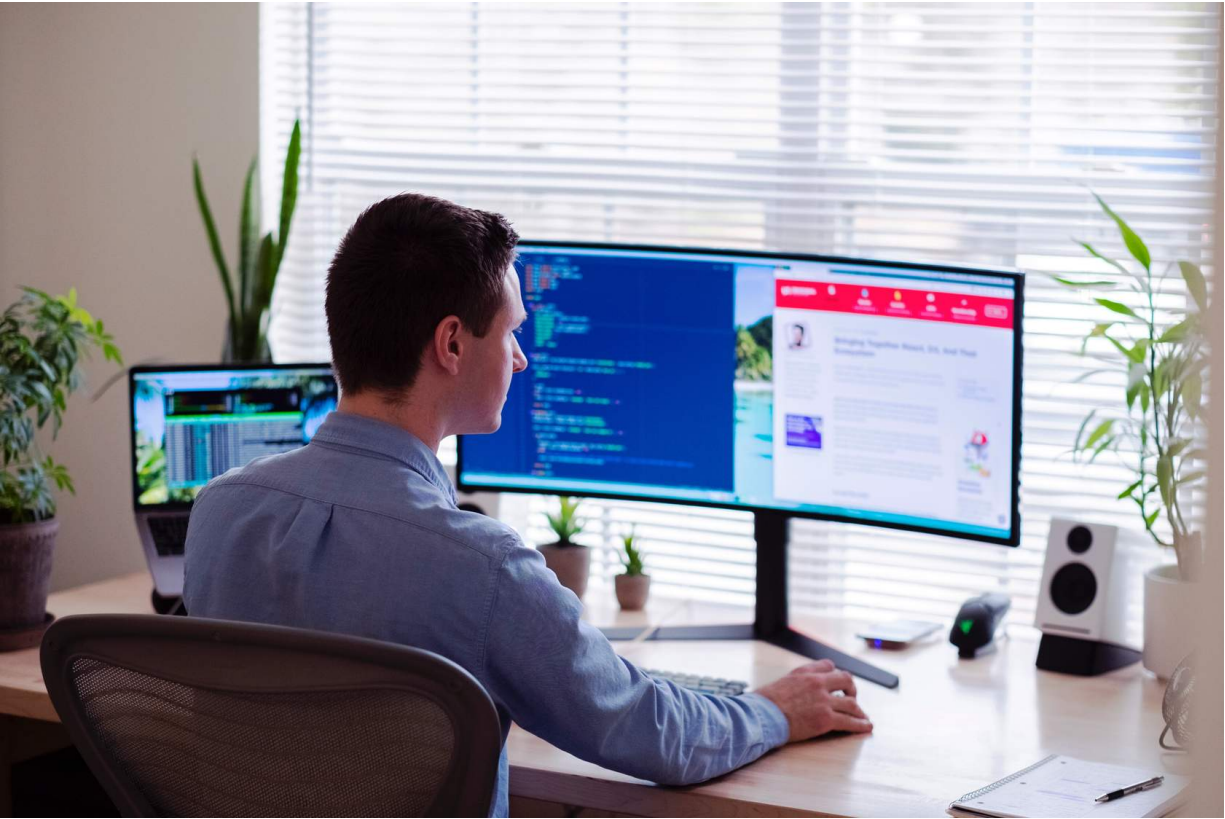
CONTINUE

(Re-)Assess the Deadline

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(Re-)Assess the Deadline

A common problem discovered at this point is that you have an imposed delivery deadline from the client, that, based on your estimates, is unrealistic.

If you discover that you can't deliver the project in time, you must contact the client immediately.

Options

The options you have:

- Renegotiate the deadline (project delay)

- Employ additional resources (increased cost)

- Reduce the scope of the project (fewer deliverables)

Use the previously created project schedule to justify pursuing one of these options.

CONTINUE

Create a Communications Plan

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Communications Plan

A project must begin with clear communication of the project goals and the effort required to meet them.

Create a document showing:

- Who should be informed about the project?

- How often and when should they be informed?

- How will they receive the information?

Status Report

The most common reporting tool is the weekly or monthly status report, describing how the project is performing, milestones achieved, and the work you've planned for the next period.

Discover More

Review the following video titled **Project Management: Creating a Communications Plan** for more information on Project Management stakeholders.
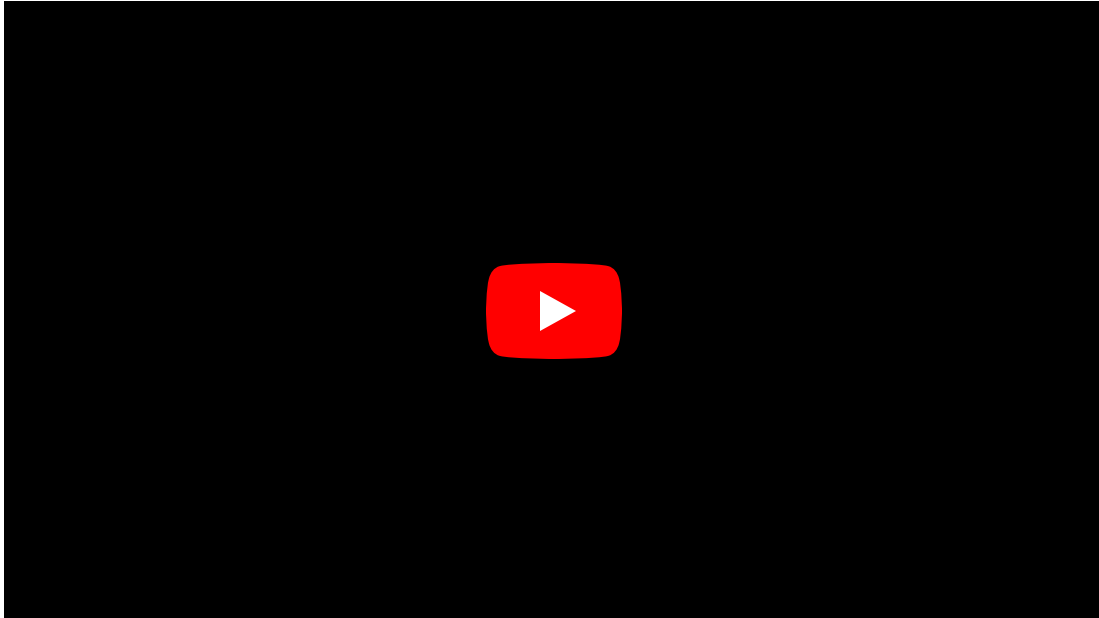
Project Management: Creating a Communications Plan

The PM plan defines how you'll communicate and with which audience. Try our Award-Winning PM Software for free: https://www.projectmanager.com/?utm_source=youtube&utm_medium=video&utm_campaign=ProjectManagementCreatingACommunicationsPlan Learn a few simple steps you can follow to create a communications plan for your project. Learn how to communicate with stakeholders and other audiences. All the best practices are right here.

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CONTINUE

Create a Risk Management Plan

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Risk Management Plan

Although often overlooked, risk management is an important part of project management. It is important to identify as many risks to your project as possible and be prepared if something bad happens.

Here are some examples of common project risks:

- Unclear roles and responsibilities

- Poor communication resulting in misunderstandings, quality problems and rework

- Stakeholders adding or changing requirements after the project has started

- Lack of resource commitment

- Misunderstanding stakeholder needs

- No stakeholder input obtained

- Too optimistic time and cost estimates

Remember: Ignoring risks doesn't make them go away

CONTINUE

Manage the Documentation

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Documentation

To keep the project transparent and everyone on the same page, keep your project plan attached to other project-related documents such as the proposal, time logs, work reports, meeting notes, or anything else that might come in handy.

CONTINUE

Format

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Format

Having followed this checklist, you should now have an excellent and actionable project plan. Now it's time to match the content with appearance.

- Include the project information such as the client & project name

- Add your company's (and the client's) logo

- Use your company's branded fonts and colour scheme

CONTINUE

Track the Progress

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Progress Tracking

Congratulations, you made it! Don't forget to update your plan as the project makes progress, and continually measure progress against the plan.

Project managers often use a project KPI dashboard that provides a quick overview of the project's performance and updates. Having a real-time overview of the KPIs helps to make informed decisions and achieve long-term goals.

CONTINUE

Quiz

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Ready to test your knowledge on what you learned? Click the Start Quiz button to begin.

There is no time limit and the quiz can be completed as many times as necessary to achieve a passing grade. A 80% or better is required in order to receive credit/passing grade for the quiz.

A project can create: (Select all that apply.)

☐ A product that can be either a component of another item, an enhancement of an item, or an end item in itself.

☐ A service or a capability to perform a service (e.g., a business function that supports production or distribution).

☐ An improvement in the existing product or service lines (e.g., A Six Sigma project undertaken to reduce defects).

☐ A result, such as an outcome or document (e.g, a research project that develops knowledge that can be used to determine whether a trend exists or a new process will benefit society).

☐ All of these options.

Fill in the blank: A _____ is a temporary endeavour designed to produce a unique product, service or result with a defined beginning and end undertaken to meet unique goals and objectives, typically to bring about beneficial change or added value.

○   project

○   service

○   business

○   manager

True or False: The outcome of the project may be tangible or intangible.

○   True

○   False

What is a primary challenge of Project Management?

○ Achieve all of the project goals within the given constraints.

○ Make all stakeholders happy.

○ Meet all time deadlines within a project.

○ Ensure employees are not overworked in a project.

Fill in the blank: A _____ is a set of interrelated actions and activities performed to create a pre-specified product, service, or result.

○   process

○   service

○   project

○   task

Identify the phases of the project management lifecycle. (Select all that apply.)

☐ Initiate

☐ Plan

☐ Execute

☐ Monitor and Control

☐ Communicate

☐ Close

☐ Manage

Match the correct item in regards to the SMART acronym.

M	specific, significant
T	measurable, motivational
A	agreed upon, attainable, action-oriented
R	realistic, relevant, rewarding, results-oriented
S	time-bound, tangible, trackable

Summary

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Key Points

In this course, the following was covered.

- Definition of a project

- Examples of a project

- Overview of Project Management

- Explanation of the Project Management Lifecycle

- Tips within a Project Checklist

Course Reference

n.d.. Open Educational Resources Commons. Project Management. Public Domain.
https://www.oercommons.org/courseware/lesson/59988/overview

Thank you for completing this course!

References

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