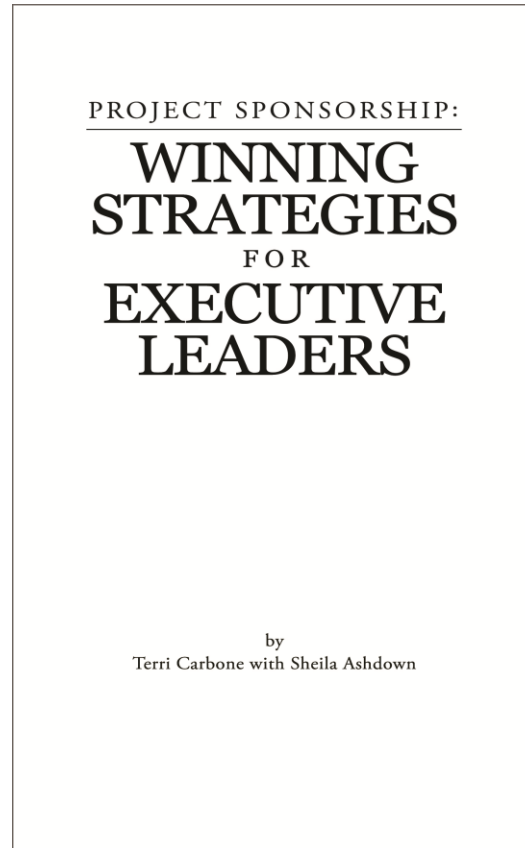


The Critical Toolkit for Successful Project Managers

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Critical Toolkit - Overview

- The famous coach, John Wooden, once said, “The best competition I have is against myself to become better.”
- He also talked about learning the fundamentals as the best chance of succeeding.

Critical Toolkit - Overview

- In this session we will focus on:
 - The fundamentals
 - The character and integrity of the profession
 - The toolkit and why each step is important and how all of it comes together to create and amazing result
 - How short cutting the process and not doing the work will not only result in a disaster, but could permanently ruin your reputation and harm the PM profession as a whole

Step 1: Let's start with the perception of the PM

- What have you hear your Business Partners say about Project Management or Project Managers?
- How best, as their partner, can you be an excellent Project Manager?

Let's look at what we're about to go do:

- <https://www.youtube.com/watch?v=I9ficvPdpZg>

Step 2 :Defining The Project Purpose

- Sharing the vision – Making sure there is a Project Charter which includes:
 1. Statement of Purpose
 2. List of everyone involved
 3. Scope (in and out)
 4. Deliverables
 5. Critical Success items
- As a Project Manager, you would work with your Sponsor to provide this document. Be sure you work together to be sure it contains the Sponsor's vision
- Require a full team be selected and involved – what does this look like?
- Be sure that the team has reviewed the Charter and added their input to the to the deliverables and have confirmed the items in and out of scope

NOTE: The project moving forward without this agreement of the project purpose and vision by the entire team is already at Risk

Step 3 – A REAL Project Schedule

- Project Schedule essentials:
 - Thorough and concise breakdown of the tasks and deadlines. This information MUST come from the each person who will be doing the actual work.
 - Planning for testing, Business tasks, and Operational Readiness/Change managements tasks should all be captured
 - Beware of “fake” project plans where reporting milestones that your Sponsor will depend on for critical business decisions, are not a part of your plan

Step 3 – A REAL Project Schedule (continued)

- Project Schedule essentials (continued):
 - A sequence of events. Even in Agile methodologies one item has to be done before another. It is important that the team members have called this out and that you, as the Project Manager, has captured this in the schedule.
 - A clear critical path to show that the essential work is being done on time.
 - Key, defined milestones for completion. The Project Sponsor should be able to expect to find critical milestones that the Project Manager has called out for reporting throughout the project.
- Red flags:
 - Project plan put together without the team's input
 - Milestones not linked to the defined tasks
 - Testing planning missing
 - Business tasks missing
 - Those funny blue boxes on the side
 - No predecessors or successors
 - No % complete

Step 4 - Risk Management

- Conduct a Risk Workshop is conducted for your project
- Risk Workshop and Project Risk List Essentials:
 - Everyone participates and answers the question, “What about this project keeps you up at night?”
 - Expect 30 – 40 Risks or more
 - Risks are stated in an ‘if, then’ format. For example, “If the invoices are not received by mm/dd/yyyy date then the payments will be late and there could be fines assessed”.
 - Each Risk is assigned an owner. Problem solving is not done at the meeting. The Project Manager follows up with each owner to find out how they will mitigate (prevent) the risk.
 - A project with identified and mitigated Risks will lead to success because many, many of the issues will be avoided.
 - The Risk list and its updates should be reviewed by the team weekly until the risk is solved and is closed.
 - Remember, a Risk that has already happened, is no longer a Risk, but is an Issue that must now be addressed.
- Your Project Sponsor should know what the risks are, which have the highest possible impact, and the progress of mitigating them. While the top risks will be reported in your status report, the Sponsor should have knowledge of the full list of items. Help your Project Sponsor be aware of the Risk items where he/she can help and possibly apply their “super powers” to eliminate risks.
- Do not hesitate to question and add risks that you feel were missed. Risk Management is a Critical Component to your project’s success

Step 5 - Communications

- As the Project Manager, work with your Project Sponsor to define the status report information that will best meet his/her needs and style
- Project Status Report Essentials:
 - Frequency – good rule of thumb is weekly
 - Content:
 - Team accomplishments
 - Planned accomplishments for next week
 - Top Risks
 - Current issues
 - Critical Milestones (usually 5- 10)
 - Overall Status
- If you use Red, Yellow, Green indications, be sure that their meaning is very well understood (a legend on the report is helpful). Remember a project that is past the original planned dates should not be reporting green.
- Trust your instincts. If something doesn't feel right based on your observations be sure and ask.
- Look for opportunities for you and your Sponsor to be supportive in mitigating risks or solving issues.
- Utilize the “next two weeks” process for the entire team so everyone is clear on what's the focus for the next two weeks and the final deliverable date is clearly stated for everyone on the project.

Step 6 - Operational Readiness / Change Management

- Embrace the responsibility that the all parts of the team have to be ready for the upcoming change
- Operation Readiness / Change Management essentials:
 - Identify an owner (preferably the manager of the area that will be most affected by the change)
 - If there is a department in your company that has expertise in this area, have the owner reach out to them to develop items such as:
 - Determine who is directly and indirectly impacted
 - Create a Communication plan getting people ready for the change
 - Build a training plan including named resources and timeframes
 - Include Train the trainers so experts in the operational area will be in place post go-live
 - Expect that different people deal with change at different paces so do a self-assessment after the training and before the go-live to see if some need additional help

Step 7 - Going Live...and Beyond

- You're almost across the finish line, but the details at this point are critical
- Cutover Planning
 - Be sure you work with the team at least 30 days before go live to create a very detailed cutover plan. This will make or break a go-live.
 - Items to be sure are included and, like the project schedule, you need to personally validate that it is complete and has the input of the team:
 - Statement of the project purpose (why are we doing this work?)
 - Project Success criteria (restated from the charter)
 - Name and contact information for all personnel involved in the cutover
 - Names and phone numbers of the management and sponsors who will be involved or available for escalation
 - Minute by minute schedule of events
 - Communication plan
 - Risk assessment
 - Emergency process
 - Backout plan (should there be a serious issue and the process has to stop the team needs to be able to be sure the business can still function the next business day)

Step 7 - Going Live...and Beyond (cont'd)

- **Post Go-Live Support and Communications**
 - Your team should have a support plan in place to be on hand to support the team through the first few days of the change
 - This should include a dedicated support team, a “hot line” or a “war room” where the team can get immediate support for questions
 - Depending on the size of the change, this support will last from 1 – 2 days up to a week. Most well executed changes that have had lots of preparation beforehand will only have a 1-2 day heavy support requirement

Bonus! Exercise Honest Communication and Appreciation

– Post Go-Live

- Be ready to listen to honest feedback and show appreciation
- Lessons Learned
 - Session similar to the Risk Workshop led by you, the Project Manager
 - The question this time is: What went well, and we should continue doing, and what can we do better next time?
 - It is critical that this is framed specifically in the question above. There must not be blame, personal names, or questions like, “what went wrong or went badly?”. All references are to roles and project events only.
 - Be honest. By now the team should have a high level of trust in each other and feel that they can express their opinions without repercussions.
 - Ask the Sponsor to attend if you feel that the team will speak openly with him/her in the meeting. That level of trust should be your goal.

Bonus! Exercise Honest Communication and Appreciation

– Post Go-Live (Cont'd)

- Recognizing the team
 - Remember that long term most of your team will work for recognition and not just for a salary, especially your high achievers
 - If the project was successfully completed, plan recognition for your team. This actually works best if planning for this is started about 6 weeks before the go-live for a celebration date about a month after go-live
 - Include:
 - Personal thank you note or signed certificate from the Sponsor
 - Catered lunch or dinner with a short speech from the Sponsor
 - Other rewards as is appropriate for the project size and budget
 - Don't leave this step out!

Conclusion

- Combine the right attitude with the right actions at the right times
- Cultivate integrity within yourself and your organization
- Build trust
- “Inspect what you expect”
- Ask questions and follow up
- Make Organizational Readiness a priority
- Create effective accountability systems
- Recognize your team and celebrate their efforts and commitment
- Paint the Whole Picture and your professionalism and expertise will lead to personal and professional success