



Project Manager **TOOLKIT**

by Andra Arsene

1st version

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Chapter 1

Introduction



Project Management overview



Basically, project management is the application of processes, methods, skills, knowledge, and experience to achieve specific project objectives according to the project acceptance criteria within agreed parameters.

*The **5 basic phases** in the project management process are:*

- 1. Project Initiation*
- 2. Project Planning*
- 3. Project Execution*
- 4. Project Monitoring and Controlling*
- 5. Project Closing*

Project Management value

The **strategic value** points that effective project management can offer an organization include the following:



- ✓ Provides a **controlled way** to rapidly respond to changing market conditions and new strategic opportunities.
- ✓ Maximizes the **innovative and creative capabilities** of the organization by creating environments of focus and open communication.
- ✓ Allows organization to **accomplish more** with less costs.
- ✓ Enables better **leverage** of both internal and external **expertise**.
- ✓ Provides key information and **visibility on project metrics** to enable better management decision-making.
- ✓ Increases the pace and level of **stakeholder acceptance** for any strategic change.
- ✓ **Reduces financial losses**.

The Project Manager

Key roles played by the project manager:

Planner - ensures that the project is defined properly and completely for success, all stakeholders are engaged, work effort approach is determined, required resources are available when needed.

Organizer - using work breakdown, estimating, and scheduling techniques, determines the complete work effort for the project.

Central point-of-contact for all oral and written project communications.

Quartermaster - ensures the project has the resources, materials, and facilities it needs when it needs it.

Facilitator - ensures that stakeholders and team members who come from different perspectives understand each other and work together to accomplish the project goals.

Persuader - gains agreement from the stakeholders on project definition, success criteria, and approach.

Problem-Solver - utilizes root-cause analysis process experience, prior project experiences, and technical knowledge to resolve unforeseen technical issues.

Coach - determines and communicates the role each team member plays and the importance of that role to the project success.

Librarian - manages all information, communications, and documentation involved in the project.

"The Police Officer" - consistently measures progress against the plan, develops corrective actions and reviews quality.

Project Manager skills

*There is a broad range of skills needed to effectively manage the people, but it becomes clear that the same is applicable when we talk about a process, technical aspects of any project, and here we will find a set of **key skills** that each project manager should have:*

***Project Management
Fundamentals***

Business Management Skills

Technical Knowledge

Communication Skills

Leadership Skills

***The key is** that the project manager has the right mix of skills to meet the needs of the given project. In addition, a self-assessment against these skill categories will allow you to leverage your strengths, compensate for your deficiencies, and focus your self-improvement program.*

Essential elements for a successful project management

*In order to ensure that all your projects reach the required level of success, here are the **5 essential elements** that need to be included:*



Strategic Planning

Product Development

Communication

Resources

People

*Continues
with
Chapter 2*

*Project
planning*



Defining a project

A project is defined as a sequence of tasks that must be completed to attain a certain outcome

*Before starting to define the project there are **seven** basic project definition **questions** very important to help you in getting the key needs for your projects and these are:*

1. *Why are we doing this? (Purpose)*
2. *What organizational level goal(s) does this project support? (Goals and Objectives)*
3. *How does this project fit with the other projects that are going on? (Scope, Project Context, Project Dependencies)*
4. *What is the expected benefit from this project? (Expected Benefits, Business Case, Value, Success Criteria)*
5. *What are we going to do? (Scope)*
6. *Who is impacted by this and who must be involved? (Stakeholders)*
7. *How will we know when we are done or if the project was successful? (Success Criteria)*

Planning a project

Project planning is part of project management, which relates to the use of schedules such as Gantt charts to plan and subsequently report progress within the project environment. Project planning can be done manually or using project management software.

*There are **9 steps** to create a project planning and following them you will know not just how to plan a project online but also will help you to execute your project successfully.*

Identify all stakeholders.

Define roles and responsibilities.

Hold a kickoff meeting.

Define project scope, budget, and timeline.

Set and prioritize goals.

Define deliverables (a product, result, or capability)

Create a project schedule (timeline).

Do a risk assessment which should include - project scope, resources (personnel, financial, and physical), project delays and failures of technology or communication.

Communicate the project plan to your team and to the stakeholders.

How to break-down a project

A **WBS** shows the work and any interim deliverables that will be required to produce the major project deliverables identified in the project definition process. In most cases, the WBS reflects the components that make up the final deliverables and the approach (methodology) used to develop, integrate, and validate them. In short, the WBS is an organized task list. Tools: **ASANA, EASYPROJECT, LUCIDCHART, VISIO, EXCEL.**

The Project Management Institute (PMI) considers the WBS the most important tool of the project manager. Why?

More than any other project management tool, the WBS provides the foundation for defining and organizing the work needed to fulfill the project objectives.



Uncommon types of work breakdown structures as well:

- ✓ A **verb-oriented WBS** defines the deliverables in terms of actions.
- ✓ A **noun-oriented WBS** defines work in terms of components (this is also called a product breakdown structure).
- ✓ A **time-phased WBS** breaks the project into phases for long-term projects.

Developing a project schedule

The **project schedule** serves as the chief integration point for most, if not all, of your project planning efforts. The project schedule reflects (or should reflect when the schedule development process is complete) all of the following:

- ✓ WBS
- ✓ Resource plan
- ✓ Work estimates
- ✓ Key milestones
- ✓ Responsibility assignments (RASIC)
- ✓ Quality management plan
- ✓ Risk management plan
- ✓ Communications management plan
- ✓ Procurement management plan
- ✓ Staff management (training) plan



Determining the project budget

*The project budget estimates all of the costs the project will incur, when they will be incurred, and is a key component of the overall project plan. The project budget is important for the following **reasons**:*

- ✓ *Planning validator*
- ✓ *Performance measurement*
- ✓ *Managing expectations*
- ✓ *Cash flow management tool*
- ✓ *Justifying project investment*

Before we get into the details of building a project budget, let's review the fundamental principles when you start developing a project budget: should iterate the process, include the total lifecycle, should be comprehensive, include a buffer and document assumptions.

*Sources of **project costs**:*

- | | |
|----------------------------|----------------------------|
| ✓ <i>Labor costs</i> | ✓ <i>Travel</i> |
| ✓ <i>Equipment</i> | ✓ <i>Operational costs</i> |
| ✓ <i>Materials</i> | ✓ <i>Disposal costs</i> |
| ✓ <i>Licenses and fees</i> | ✓ <i>Overhead costs</i> |
| ✓ <i>Training</i> | ✓ <i>Costs of “change”</i> |

How to do a project checklist

*A **checklist** for project management provides a benchmark for your project execution direction. It is an approach that will show what to do in the projects and lets you know if you have met the project quality.*

What does a project plan project checklist include?

Define the project

Clearly state the objective of the project effort avoiding broad or vague language. Identify the constraints: scope, budget and timeline.

Create the WBS

Identify the requirements, bucket them to create blocks of work based on the needed schedule, estimate time requirements and determine the critical path.

Schedule resources

Identify the team members with the skillset and availability to join your team.

Develop the risk management plan

Identify known risks and their impact. Perform a risk analysis and determine the risk responses for each.

Choose a communication plan

Establish how team meetings, tasks lists and status reports will be handled.

And...
Chapter 3

***Project
controlling***





Controlling a project

Project control consists of the information systems and the management procedures that allow us to answer questions such as

- Are we on track?*
- Are we on budget?*
- Are we on schedule?*
- Are we delivering what we said we would?*
- Are we meeting quality and performance standards?*
- Are we meeting stakeholder expectations?*
- What have we accomplished?*
- Will the project objectives be met?*
- What deviations/variances exist?*
- What corrective actions are we taking?*
- What caused these variances?*
- What risks are we monitoring?*
- What issues do we need to resolve?*
- What lessons have we learned?*

***Officially,** PMI defines the controlling processes as those processes that ensure that project objectives are met by monitoring and measuring progress regularly to identify variances from plan so that corrective action can be taken if necessary.*



Managing the project changes

A project change is a change in any of the critical success factors (scope, schedule, costs, quality, and project acceptance criteria).

The project needs a way to recognize the change, evaluate the impact of the change, communicate the change, and make planning adjustments if the change is accepted.

There are **seven key management principles** for effective project change control:

- ✓ *Plan for changes.*
- ✓ *Set up change control system.*
- ✓ *Educate stakeholders.*
- ✓ *Use the system.*
- ✓ *Minimize scope changes.*
- ✓ *Over-communicate.*
- ✓ *Be a watchdog.*

What are the **techniques** for change prevention?

Let's see them during the next page!

Managing the project changes

- ✓ **Clear project definition** - the more effort spent up-front to get agreement on clear project objectives and success criteria from the appropriate stakeholders, the less likely we are to get change requests during the project.
- ✓ **Solid requirements definition**
- ✓ **Trace requirements** - there is nothing like linking any work specification to its original source to control project scope.
- ✓ **Formal acceptance sign-offs** - are a key aspect of change control management, especially for client-vendor oriented projects.
- ✓ **Engaged stakeholders** - while formal signoffs do act as strong "stick" incentive to get stakeholders involved, there is nothing like having professional, knowledgeable, engaged stakeholders who are committed to doing their best as the best weapon against unplanned scope expansion
- ✓ **Use the right project approach** - this technique is more about risk management but change control and risk management are very intertwined.
- ✓ **Use WBS to illustrate impact** - this technique may not prevent change requests from being submitted, but it can help you classify something as a change (and not part of the intended scope), and it can help you communicate the impact of the proposed change.
- ✓ **Defer to post-implementation** - another technique that will not prevent change requests, and that may not be applicable to all project situations; however, if it does, it can reduce impact on the project success factors.
- ✓ **Track assumptions and constraints** - this is part of your risk response plan too, but part of your "watch dog" mindset is to keep a close eye on the project assumptions and constraints.

Managing the project issues

Managing project issues is an example of proactive project management. Through solid planning, effective stakeholder management, and insightful risk management, you can reduce the number of issues your project will encounter.

Types of project issues:

1. **Major Problem:** *one that could impede progress or the successful completion of the project and requires immediate attention.*
2. **Opportunity:** *not all issues are bad, some can offer an unforeseen opportunity.*
3. **Concern:** *is not a major problem, but it's something you want to stay aware of, because it could develop into something that requires attention.*
4. **Situation:** *is another issue that might be a concern or a major problem but develops from a situational standpoint.*

Managing issues is no different than managing a project in that it requires a process and a plan to implement the strategy and these steps will help you have a framework to control these issues:

Create Register.

Report Promptly. Timing is important.

Log Issues.

Assign Actions.

Monitor Progress.

Assess Impact.

Approve Resolution.

Close It Out.

The key risk management principles

*The **five basic risk management principles** of risk identification, risk analysis, risk control, risk financing and claims management can be applied to most any situation or problem. One doesn't realize that these principles are applied in daily life over and over until examples are brought to light.*

***Risk identification** is just what it sounds like – what risks are presented to me/my patient/my organization with the scenario in front of me?*

***The analysis of the risks** identified begs one to ask, what is the worst that could happen?*

***Risk control** offers opportunities for risk avoidance, risk prevention and risk reduction. The risk avoidance technique in our car example would be to not own a car or ride in a car.*

***Risk financing** is a way to finance losses that the risk control techniques implemented did not stop from happening.*

***Claims management** when a loss occurs, a claim may be filed to recover damages.*

By effectively managing project risks using these principles, a project manager always remains in control of the project, enables better project decisions, and provides the project the best opportunity for success.

And...
Chapter 4

***Project
execution***



LEAD

The process of leading a project is more than managing the project. The process of leading a project entails the approach utilized to guide the people involved (*team, stakeholders, organization*) toward the accomplishment of the project's objectives.

Key points to know about leading a project:

One, there are many aspects of project leadership.

Two, the project manager is not the sole provider of project leadership.

Three, specific leadership providers will vary depending on project environment.

Examples:

Project Manager: Direction and Plan, Organizational Influence, Commitment, Stakeholder Expectations, Business Issues, Managing risks, Facilitation, Communications point, Project Team, Conflict resolution, Managing Business Change, Technical Issues.

Project Sponsor: Direction and Plan, Organizational Influence, Commitment, Stakeholder Expectations, Business Issues, Managing Business Change, Managing risks.

Team Leader: Project Team, Conflict resolution, Business Issues, Managing risks.

COMMUNICATE

Per PMI, project managers should spend **90%** of their time communicating:

Status reports

Progress review meetings

Kickoff meetings

Executive reports

Presentations

Financial reports

Government (or external agency) reports

Issue logs

Risk logs

Change request logs

Role-responsibility matrix

Project organization chart

Any project deliverable.

Why project communication is necessary?

Managing expectations

Managing the project team

Reducing conflicts

The saving grace.

Best practices : make time for regular catch ups, establish regular review points, use online collaboration tools, keep your stakeholders involved, be present, be inclusive.

EXPECTATIONS

There are four critical components of expectations. Each expectation element is important to the success of the project and is subject to the natural push and pull between project reality and stakeholder perceptions.

Critical Success Factors *This aspect includes the traditional measuring rods of scope, schedule, and budget.*

Project Impact *This component highlights the "change" impact of the project output (results, solution, work products). It accounts for any work, process, or organizational change experienced by any stakeholder as a result of the project outcome.*

Work Products *This category covers things such as "that's not what I asked for," "that's not what I meant," and "oh no, you gave me exactly what I asked for."*

Project Execution *This final component deals with the day-to-day execution of the project.*



EVALUATE

The **10 key management principles** to guide the team's performance are:

Adapt management style.

Get the right people.

Plan as a team.

Keep the team focused.

Set clear expectations.

Facilitate productivity.

Improve marketability.

Leverage individual strengths.

Recognize and reward.

Facilitate team synergy.

You can have the greatest plan in the world, but if your core project team can't get the work done as expected, it really doesn't matter. Conversely, a high performing project team can go a long way to compensate for inadequate planning and other "less than ideal" project environments.

CLOSE THE PROJECT

As in most personal interactions, how we begin and end the process can make all the difference. The same can be said for projects.

Before we review the checklist items that will drive our project ending efforts, let's touch on the key principles that drive a successful project close:

- ✓ *It is earned along the way.*
- ✓ *Think end from the start.*
- ✓ *Bring closure.*

And with these ***principles*** in mind, the 13 steps included in the ***Project End Checklist*** will ensure that we perform a complete project close and leave the stakeholders with a positive lasting impression of our project management abilities:

Gain client acceptance
Transition deliverables to owner
Close out contract obligations
Capture lessons learned
Update organization's central information repository
Issue final financials
Close accounts and charge codes
Update resource schedules
Conduct performance evaluations
Update resume
Market project accomplishments
Ask for referrals/references
Celebrate!

And...
Chapter 5

E-learning
PM





- ✓ *Timeline*
- ✓ *Outline*
- ✓ *Transcript*
- ✓ *Facilitator Guide, Participant Guide (usually used in the live sessions)*
- ✓ *Glossary based on the course/session/training*
- ✓ *Course design in a specific design tool*
- ✓ *SME final feedback*
- ✓ *Dry Runs (usually used for the live sessions)*
- ✓ *Course announcement*
- ✓ *Course publishing/Session delivery*

“

E-learning projects should include!



1. **PMs** having the first kick off meeting with the SMEs
2. **ID** receiving the resources for the content - from the SMEs
3. **PM** creating the timeline and agreeing with the SME in a new meeting about each task
4. **ID** creating the outline to provide an overview on the course – SME reviewing the outline with the ID
5. **ID/Technical Writer** writing the transcript document (writing the course content around 20 pages) based on the received resources – SME reviewing the outline with me as ID
6. **ID/ SME** write the Facilitator Guide/Participant Guide/Activities
7. **ID** creating the design part of the course and including the information from the transcript (using a specific design tool such as: Articulate Storyline, Rise, PowerPoint etc.)
8. **PM** sending a template email to the SMEs for the final feedback
9. **PM** schedule the Dry Runs and Facilitators/Trainers to lead them (just if we talk about a live session/ training delivery)
10. **Communication Manager** do the course announcement (just if we talk about a live session/ training delivery)
11. **ID** do the course publishing/Facilitator, Trainer to the session delivery

Project STEPS

And...
Chapter 6

***Tools &
Templates***



TOOLS

Download
them!



Project management tools are the project manager's answer to manage projects.

Simple projects require nothing more than a checklist while other complex ones require proper planning, assigning tasks, setting deadlines, making sure that everyone sticks to them, and tracking the time spent.

And these are:



[Kissflow Project](#)

[Trello](#)

[Asana](#)

[Zoho Projects](#)

[Wrike](#)

[Monday.com](#)

[Proofhub](#)

[Clarizen](#)

[Airtable](#)

[Kanban Tool](#)

TEMPLATES

Download
them!



Below is a list of **10 essential project documents**:

Project Timeline/Gantt Chart

Project charter

Project Management plan

RACI Matrix

Work Breakdown Structure (WBS)

Project Budget

RAID Log (Risk, Actions, Issues, Decisions)

Change Request Management

Project Schedule

Lessons Learned & Project Closure document



If you want to go to a next level in your career as **Project Manager**, you can also try to find more information and how to get certified to **PMI**.

*Thank
you!*

