Project Management Essentials

July 2025

PERCEPTION LEARNING

Five Dimensions of PM Performance

Efficiency	Customer Impact	Team Impact	Organizational Success	Future Impact
• Meeting schedule • Meeting budget • Yield • Other efficiencies	• Meeting requirements • Benefit to customer • Extent of use • Customer satisfaction • Enhancing long-term customer relationships	• Team satisfaction • Team morale • Skill development • Team member growth • Team member retention • No burnout	• Stakeholder influence • Budgetary impacts • Service quality • Cycle time • Organizational measures	• New technology • New market • New product line • New core competency • New org capability

Project Management Methodologies

Recommendation: Borrow what works for you, your team, and your situation!
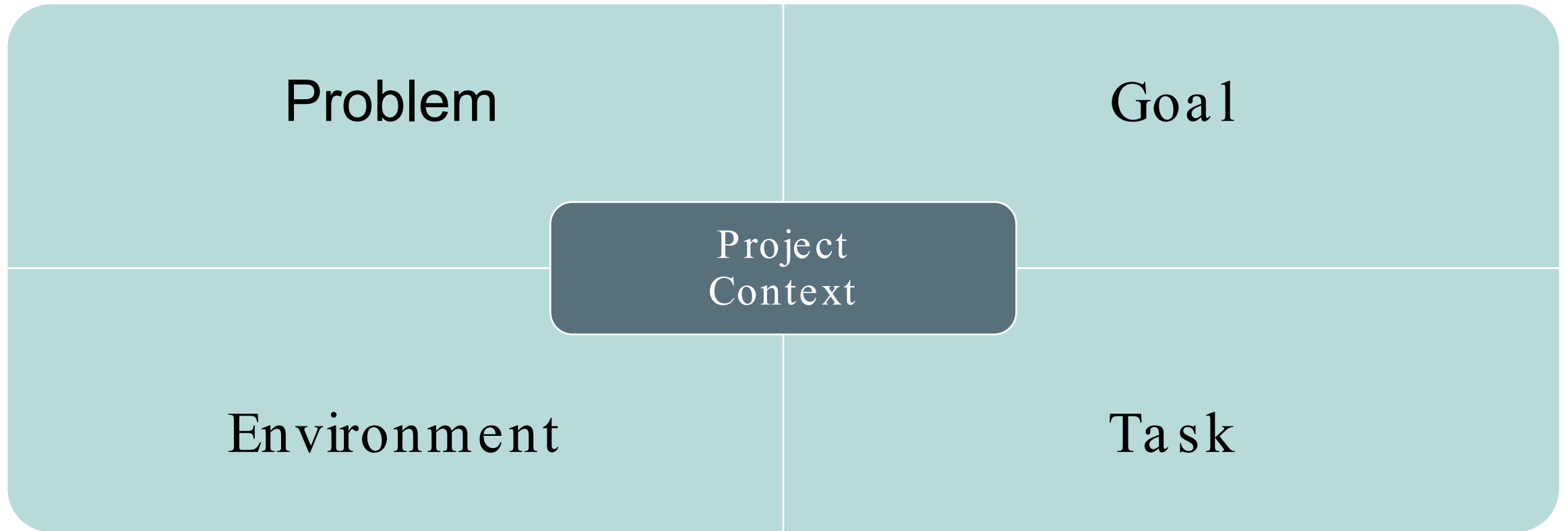
Fundamental Project Phases

Planning → Build Up → Implementation → Closeout

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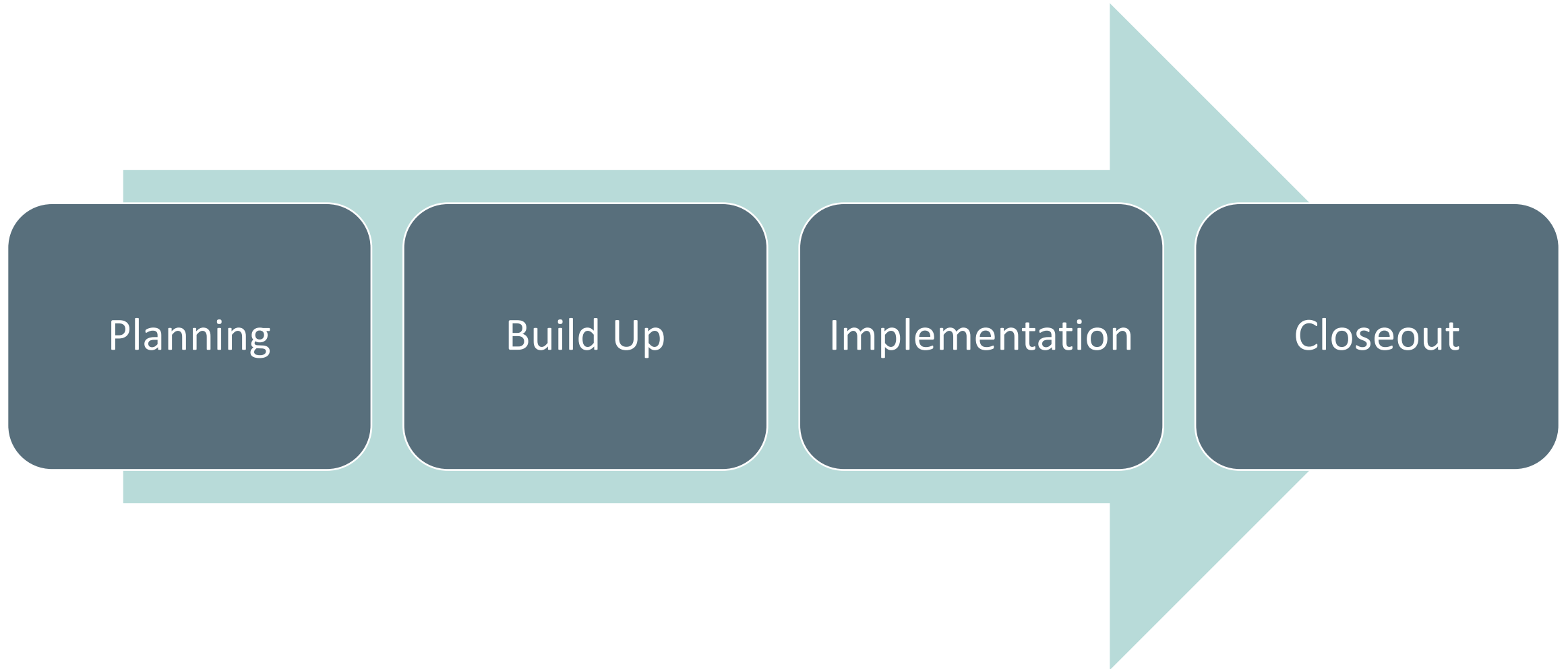
P l a n n in g

Remember 6P:
Proper prior planning
prevents potential problems.

Elements of Context

Problem

Goal

Project Context

Environment

Task

Recommended Approach: Kanban

- Uses boards and cards to track tasks through stages like "To Do," "In Progress," and "Done"
- Why?
  - **Visual Clarity:** Everyone sees the status of tasks at a glance
  - **Flexibility:** Easily reprioritize tasks as deadlines shift or new items arise
  - **Flow-Based, Not Time-Based:** Perfect for event work that's deadline-driven but non-iterative
  - **Limits Work-In-Progress (WIP):** Prevents bottlenecks and burnout
- Modifications:
  - Kanban + Checklists
  - Kanban + Weekly Planning + Monthly Retros

The Triple Constraint

Quality
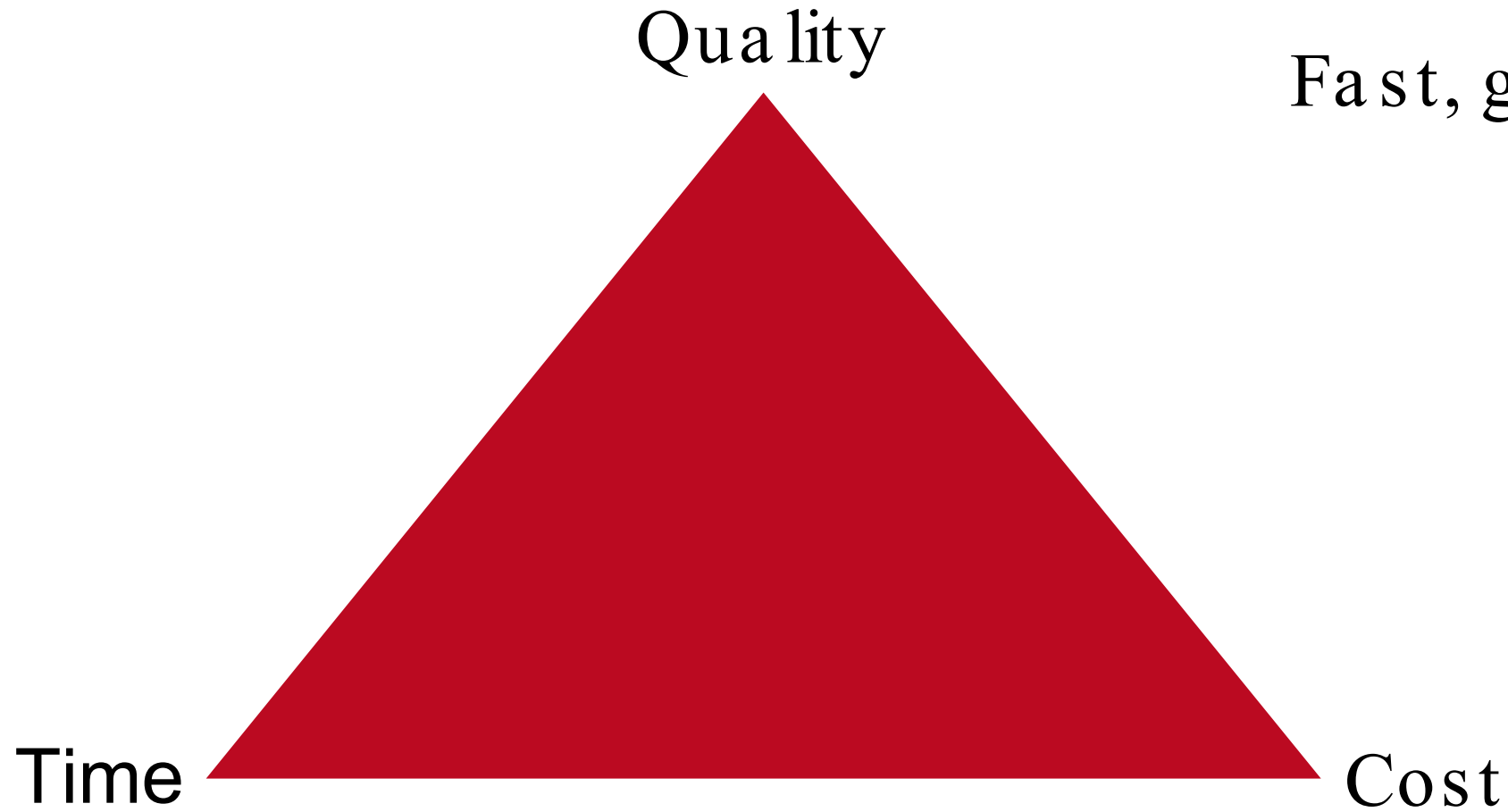
Fast, good, or cheap…

..pick two.

Time

Cost

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Risk Planning

- Strong project managers are regularly scanning for and planning around risks
- Informal risk planning can be as simple as answering the Environment questions and making mental notes
- More formal risk planning techniques include:
    - Murder Boarding
    - Risk Index Calculations
   - Risk Management Logs

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Murder Boards

- Gather a small group of people together

- Review the problem, goals, and tasks for the project

- As a group, brainstorm all the things that could make the project unsuccessful
  - Withhold judgment and do not defend the project
  - Be as specific as possible with what might kill the project

- Once the group has exhausted all ideas, go through each one and decide whether to ignore the risk, eliminate the risk, or manage the risk

Build Up

"It is better to first get the right people on the bus, the wrong people off the bus, and the right people in the right seats, and then figure out where to drive."

- Jim Collins

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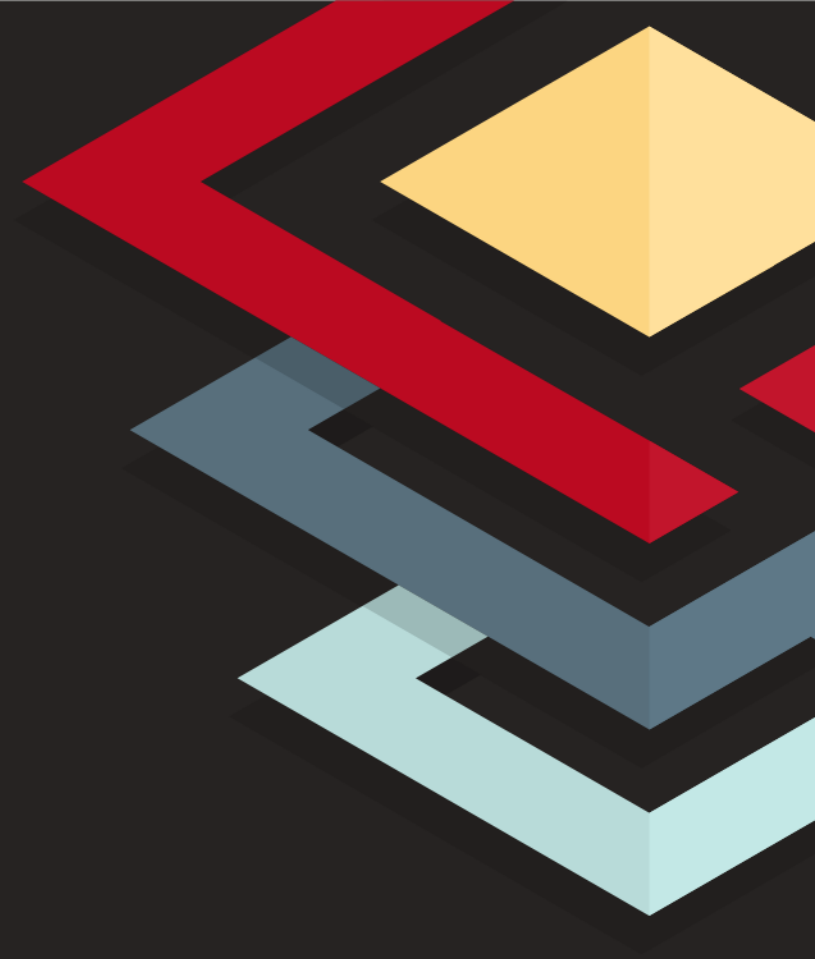
RACI Basics

R Responsible

A Approval/Veto

C Consult

I Inform

Without clarity, we are driven by assumptions and intentions, both of which are often misleading.

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RACI Process

|	Person A	Person B	Person C	Person D
Task 1	R	A/C	C	I
Task 2	C	C	R	A
Task 3	I	I	A/C	R
Task 4	C	A	I	R

Project Communication

- Even with clear roles, a project's success will depend on the quality of the communication across the team

- The more long-term and/or complex a project, the greater the need for formal communication channels

- Meetings are an essential means to convey information, but they need to be used thoughtfully

- It is the PM's job to clearly set the expectations for project communication at the outset of a project

Death by Meeting

"To make our meetings more effective, we need to have multiple types of meetings, and clearly distinguish between the various purposes, formats, and timing of those meetings."
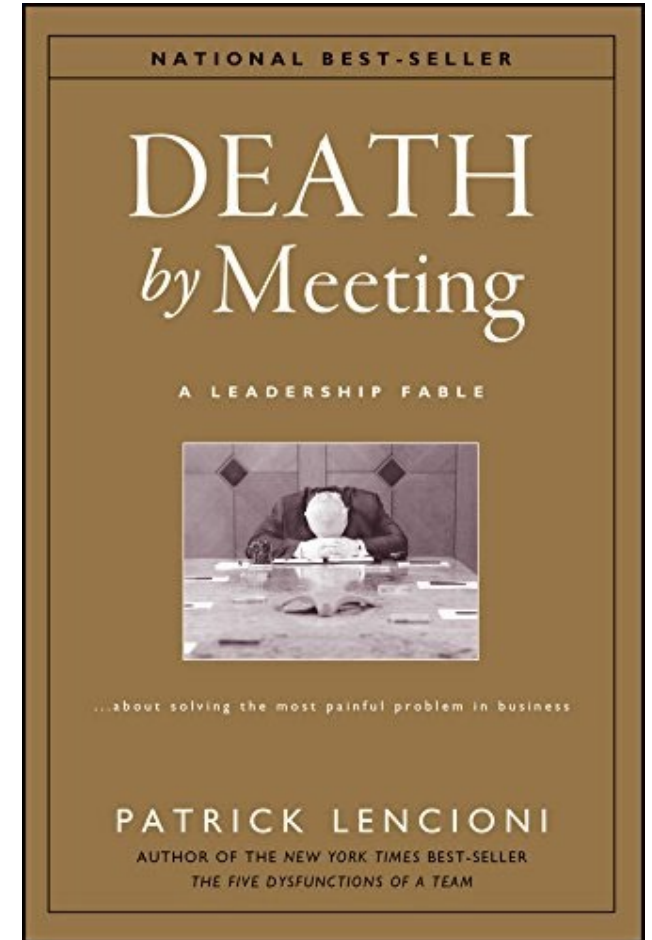
Lencioni's Four Meetings

|			
Purpose is to share daily schedules and activities. When in person, this is done standing up to encourage speed. Sometimes called a huddle meeting.	Purpose is to review weekly activities and to resolve tactical obstacles and issues. Pull strategic issues out and setup a separate strategic meeting.	Purpose is to discuss, analyze, brainstorm, and decide upon critical issues affecting long-term success. Spend 1-2 hours per topic, avoiding tactical talk.	Purpose is to review strategy, industry trends, competitive landscape, key personnel, and team development. Focus on work, limiting social interactions.
DAILY CHECK-IN	**WEEKLY TACTICAL**	**MONTHLY STRATEGIC**	**QUARTERLY OFFSITE**
NTE 5 minutes	45-90 minutes	2-4 hours	1-2 days

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Implementation

"The universe does not give you what you ask for with your thoughts – it gives you what you demand with your actions."

- Steve Maraboli
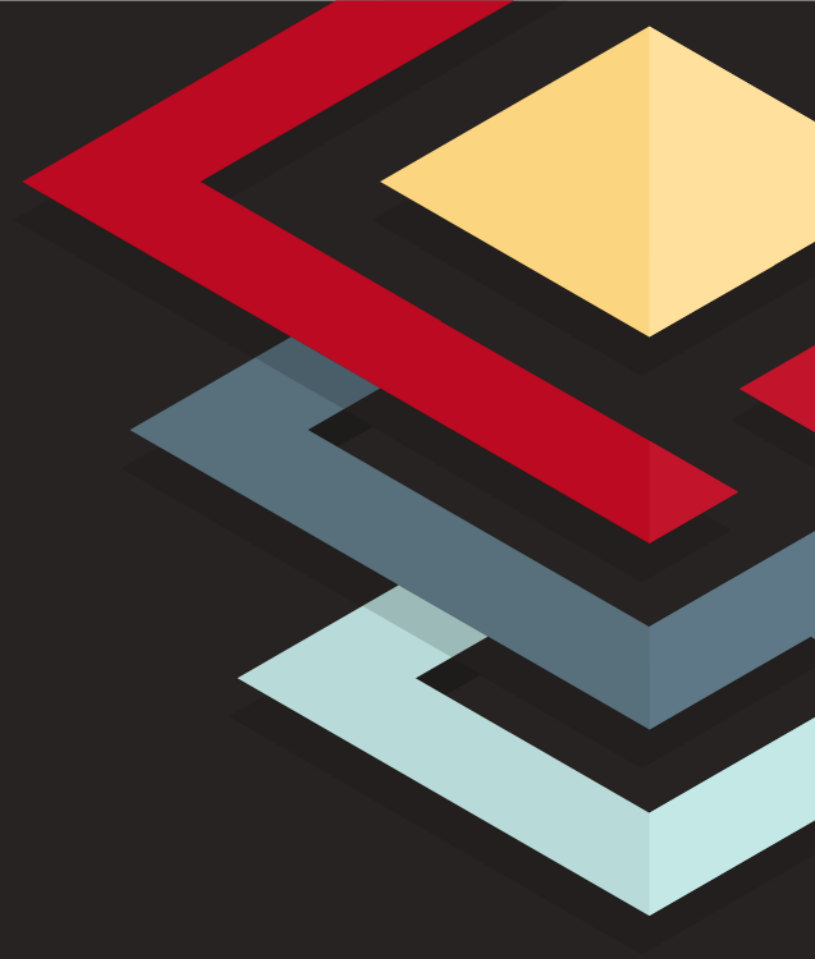
Importance of Clear Expectations

Read the following conversation

William : Hi Tonya, do you have a second?

Tonya : Sure! What's up?

William : Could you please take a closer look at that communications plan from last week?

Tonya : Of course! Happy to help.

William : Great! Thank you so much.

What is William asking Tonya to do?

Effective Requests

- What do you want?

- Who do you want it from?

- What are the conditions of satisfaction?
  - What are the timelines?
  - What is the definition of done?

- What is the context surrounding the request?

What is Feedback?

" **Feedback is information**
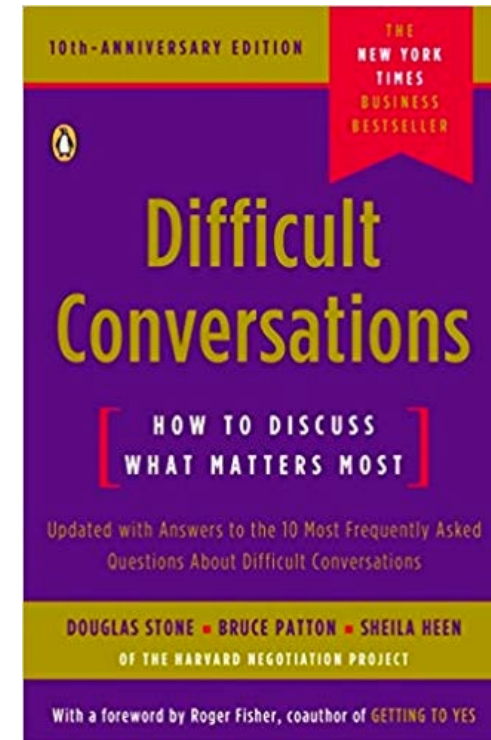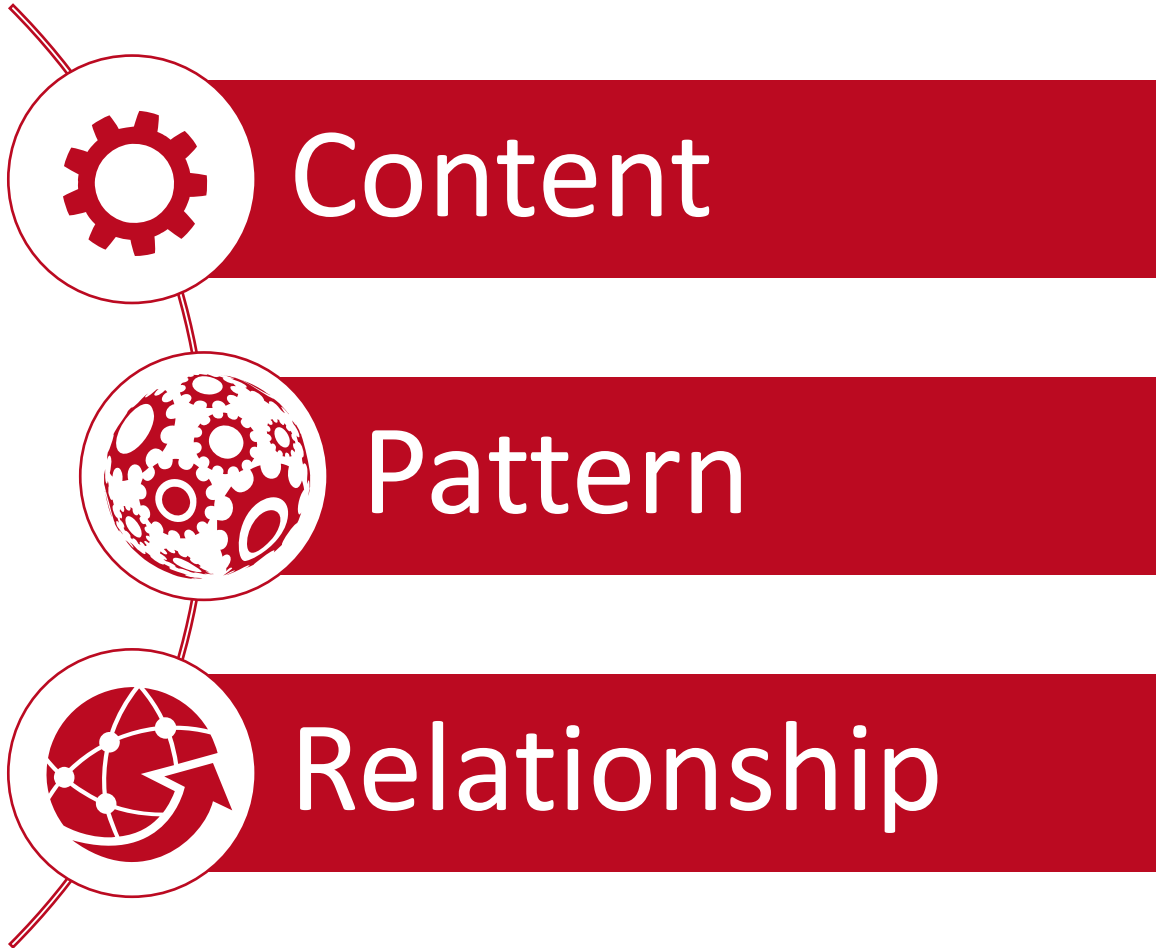provided to another person
to encourage them either:

to continue behavior that leads to desirable outcomes

- or -

to change their behavior to achieve more
desirable outcomes "

Tool for Clarity: CPR

Content

Pattern

Relationship

Closeout

"The opposite of the happy ending is not actually the sad ending. The sad ending is sometimes the happy ending. The opposite of the happy ending is actually the unsatisfying ending."

- Orson Scott Card

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Celebrating Success

- When a project ends, team members often benefit from a formal act to acknowledge the work completed and recognize accomplishments

- After the close out meeting, consider holding some kind of fun event to mark the completion of the project

- Use a range of tools to recognize contributors: kudos, certificates of recognition, awards, small gifts, etc.

- What are the ways that you have celebrated projects in the past?

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Capturing Lessons Learned

- Great project managers have mechanisms for continuous improvement built into the lifecycle of a project
- Regular retrospectives and project reviews help ensure the success of your project
- Once completed, a holistic review of the project can yield important considerations for future efforts
- At a minimum, discuss:
  - Overall Evaluation of the Project
  - Project Management
  - Collaboration and Team
  - Technology and Knowledge Management

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Thank you!

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