Elements of Context

Problem	**Goal**
What problem is this project designed to understand, solve, and/or improve? What is truly at the root of the issue versus the surface-level symptoms? When this project is done, how will things be different than they are today? Others?	What is the exact outcome or product that this project needs to achieve? What does the end product do? For whom? If there are multiple goals, what are the priorities as defined by your stakeholders? Others?
Environment	**Task**
What factors from within our organization might influence this project (e.g., culture, people, skills, procedures, regulations, and competing efforts)? What external factors might influence this project (e.g., economic, political, and geographic issues)? What technological factors might influence this effort? Others?	What is the exact work that needs to be done? How difficult is it? How well known is it? Have similar tasks been done before? How complex is it? How much time is available? Others?

Identifying Risks

- Rate probability, impact, and degree of control using a scale of:
  - 1 = Low
  - 2 = Medium
  - 3 = High
- Compute the risk index using the following formula

$$Risk\ Index = \frac{Probability\ x\ Impact}{Control}$$

- Determine which action to take
  - Ignore (do nothing)
  - Eliminate (sidestep)
  - Manage
- For managed risks, indicate mitigations and contingencies and identify a risk manager
- Log actions taken as they occur

PERCEPTION LEARNING 21

Resource: Risk Management Log

Risk Scenario	Probability	Impact	Control	Index
late review of deliverables by person X	3	1	3	1.0
funding concern	3	3	1	9.0

Resource: Risk Management Worksheet

Scenario:

Probability	Impact	Control	Index

Financial Impact:

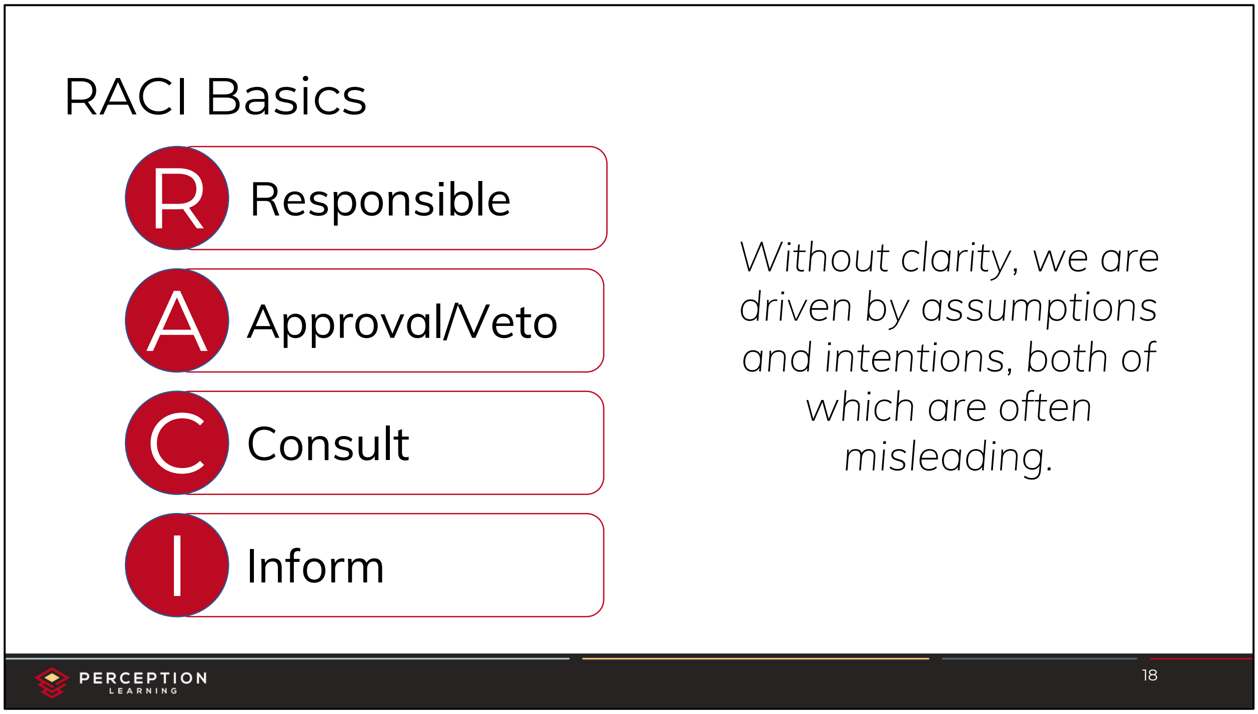
Action: ☐ **Ignore** ☐ **Eliminate** ☐ **Control**

Mitigations:

Contingencies:

Risk Manager: ____________________

Action Taken:	**Date:**



R – Responsible

This is the person responsible for "getting it done." This might mean doing the work itself, but it can also mean overseeing delegation of the work to others and maintaining oversight to get it accomplished. *As a best practice, there should never be more than 2 people designated as responsible for the work.* This prevents duplication of effort and enhances efficiency.

A – Approval/Veto

This is the person responsible for making the final decisions about the work. This could be the same person as the one responsible, but it is often a stakeholder (such as the boss) who must do a final sign off before the work product is considered complete. *As a best practice, there should never be more than 1 person with approval/veto authority.* This prevents conflicting guidance.

C – Consult

These are the people who must be consulted throughout the process of producing the work product. The person with the "R" designation (or their delegee) must solicit their input and discuss how their suggestions integrate with the larger goals of the product. Someone who is consulted will provide their input, but their input may not be ultimately included. When this is the case, it is important for the "R" to explain the reason the input was not incorporated.

I – Inform

These are the people who must be aware of progress and outcomes, but are not expected to provide any input into the process. It isn't that their input is not valued. Rather, they may not be the best person to provide input due to time constraints, expertise, or other reasonable variables. People with the "I" designation will get updates throughout a project, but will not be asked to provide feedback on the work product.

Building a RACI Chart

Step 1. Assemble the Team

When people weigh-in on decisions, they are more likely to buy-in. If you are going to be talking about the roles people will play in getting work done, they should have input into that process. So, at the outset of a project, get your team together to talk about the work that needs to get done and how you are going to work together to do it.

Step 2. Identify the Tasks

Now that you know *who* is going to be involved, it is important to identify *what* needs to get done. How you define the "what" is going to depend on the work that you must get done. For example, a team might breakdown the work into distinct processes that different team members own (e.g., responding to member requests, processing applications, registering participants, etc.). Or the work might be broken out into deliverables that need to be created (e.g., creating a webpage, producing a report, creating an ad, etc.).

Whatever way you define the work, it is important that the size of the "task" is appropriate for 1-2 people to accomplish the work. If a task is larger than this, you might need to have too many people "owning" the piece of work and you will have inefficiencies. Better to break bigger pieces of work down into smaller tasks.

Step 3. Create Your Chart

Now you will create a table to start assigning RACI roles to team members.

- Use the first row to identify each person or party involved in the process
- Use the first column to document the list of tasks you identified
- Working left to right, identify who is Responsible for getting the work done, who is the Approval/veto authority, who must be Consulted, and who should be kept Informed along the way

Step 4. Communicate Decisions

It is ideal to have your core team involved in creating a RACI chart, but there may be times where some people do not participate in your RACI charting process. For example, you didn't have the marketing team involved in your RACI process but you know they are important to consult throughout the project. Or, you might have external stakeholders that don't work within your organization, but need to be informed of progress. It is important to take time to explain roles and expectations with these parties so that the work can move forward smoothly.

Step 5. Monitor, Adjust, and Communicate

As your team begins to get the work done, it will be important to monitor how things are going and adjust accordingly. Perhaps you learn that someone who was designated as an "I" must now move into a "C" role. Or, perhaps one of your "C" team members doesn't have time to provide input and must be moved into the "I" role. Great teams constantly scan the environment for changing factors and make small adjustments to ensure things are moving forward smoothly. Ongoing communication is also essential, particularly when things change so that the team remains on the same page about how the work will get done.

Resource: RACI Template

	Party 1 ____________	Party 2 ____________	Party 3 ____________	Party 4 ____________
AoR 1 ____________				
AoR 2 ____________				
AoR 3 ____________				
AoR 4 ____________				
AoR 5 ____________				

PERCEPTION LEARNING

Resource: Project Review Template

Project Name: ____

Overall Evaluation of the Project

1. What was the overall mission of the project? Provide a short description based on your understanding or update the project mission from your original charter.
2. All in all would you say the project was successful? Why or why not?
3. How close was the project to meeting its scheduled completion date?
4. How close was the project to being completed within budget?
5. Did the project meet its final stated objectives Why or why not?

Project Management Review

1. Did the project have a sponsor? If so, what was their role during the project?
2. What tools and techniques were used in planning and tracking the project?
3. Did the scope of the project change after it was under way? If so, what was the overall impact of the change of scope? How were changes approved?
4. How was the project status communicated during the course of the project?
5. How were risks managed for the project? Were they identified ahead of time? Did any unforeseen occurrences hinder the progress of the project?
6. At the end of the project, was there a formal review of lessons learned or a review similar to the one here?

Collaboration and Team Review

1. How effective was the overall leadership of the project? Did the project manager have the resources and support required to be as effective as they could be?
2. In general, how well did the team members collaborate? Why was this so?
3. Did team members physically work together or were they separated?
4. What were the primary modes of team communication? Which worked best /Which worked least well?
5. Were all team members available at the times they were needed for project work or status meetings? What impact did this have on the project?
6. Were all stakeholders and subject matter experts available to answer questions when needed? What impact did this have on the project?

Technology and Knowledge Management Review

1. How did technology help or hinder the progress of the project?
2. Were any new technology tools introduced for this project?
3. Did the project use any kind of project management software? In what ways was it used (for example, scheduling, reporting, or cost reporting)?
4. What other tools, such as spreadsheets, diagramming tools, or team collabroation tools were used in the project?
5. Was the proejct team able to obtain adequate advice and technical support for the technology tools used in the proejct? How could this improve?
6. Are there any areas about which yo uwould like to elarn more that would make you more effective on your next project? What resources are available for obtaining that knowledge or skill?

Resource: Sample Kickoff Meeting Agenda

[Project Name] Kickoff

[Date/Time]

Attendees: ____

____

Agenda

I. Sponsor Kickoff
Demonstrate the organization's commitment to success by having the project sponsor or another high-level stakeholder explain the importance of the effort and the greater vision for the project.

II. Introductions
Even if some of the team members know one another, have each person introduce themselves and briefly explain the role they are going to be playing on the project.

III. Project Context
Share the goals, deliverables, and timetables that you've documented for the project. Provide an opportunity for people to ask questions or share inputs to refine the project context.

IV. Expectations for Communication
Share your expectations for communication throughout the project and ask team members to share their expectations. The more the group weighs in on preferences and ideas, the more likely people will adhere to the communication mechanisms going forward. Be sure to co-create an escalation process to make sure issues are proactively managed with the right people involved.

V. Project Norms
Establish a common set of expectations for how the team will work together. At a minimum, work together as a group to create expectations for the following:

- Attendance: The team cannot make decisions and accomplish its work if members fail to show up for meetings or joint work sessions. If you, the leader, are chronically late or absent, people will follow your example.
- Interruptions. Turn cell phones off during meetings and work sessions. Also, make it clear that people are not to interrupt others. Everyone has a right to speak.
- Disagreements. Team players are bound to come up with competing solutions as they tackle problems. Encourage them to vent disagreements in constructive ways (and spend time defining what "constructive" actually means to the group).

- Confidentiality. Some team issues may be sensitive. Members will discuss them freely only if what is said within the team stays within the team.
- Action orientation. The purpose of teams is not to meet and discuss. It's to act and produce results. Make that clear from the beginning.

VI. Project Plan Review
If a project plan has already been created, review it as a group so that all parties understand the tasks, subtasks, and timelines. As you review this document, document any risks that you or the group identifies so that it can be managed effectively (remember your risk management worksheet on page 16!).

VII. Q&A
While it is good to build in methods for people to participate throughout the meeting, reserve time specifically at the end for questions. Consider maintaining a parking lot for any questions that can't be answered during the kickoff meeting.

VIII. Action Items and Next Steps
Prior to the meeting, assign someone responsible for taking notes during the meeting. At the end, have this person review any action items and ensure that each one has an owner. Ask the group if any items were missed so that the list is complete and can be circulated to participants after the meeting. Once complete, share the next steps for the project including tasks that will be starting and the next time the group will meet. Remember to thank the team for contributing to this effort – your sincere appreciation can have a huge impact on the team's engagement and motivation.

Project Management Essentials

July 2025

PERCEPTION
LEARNING

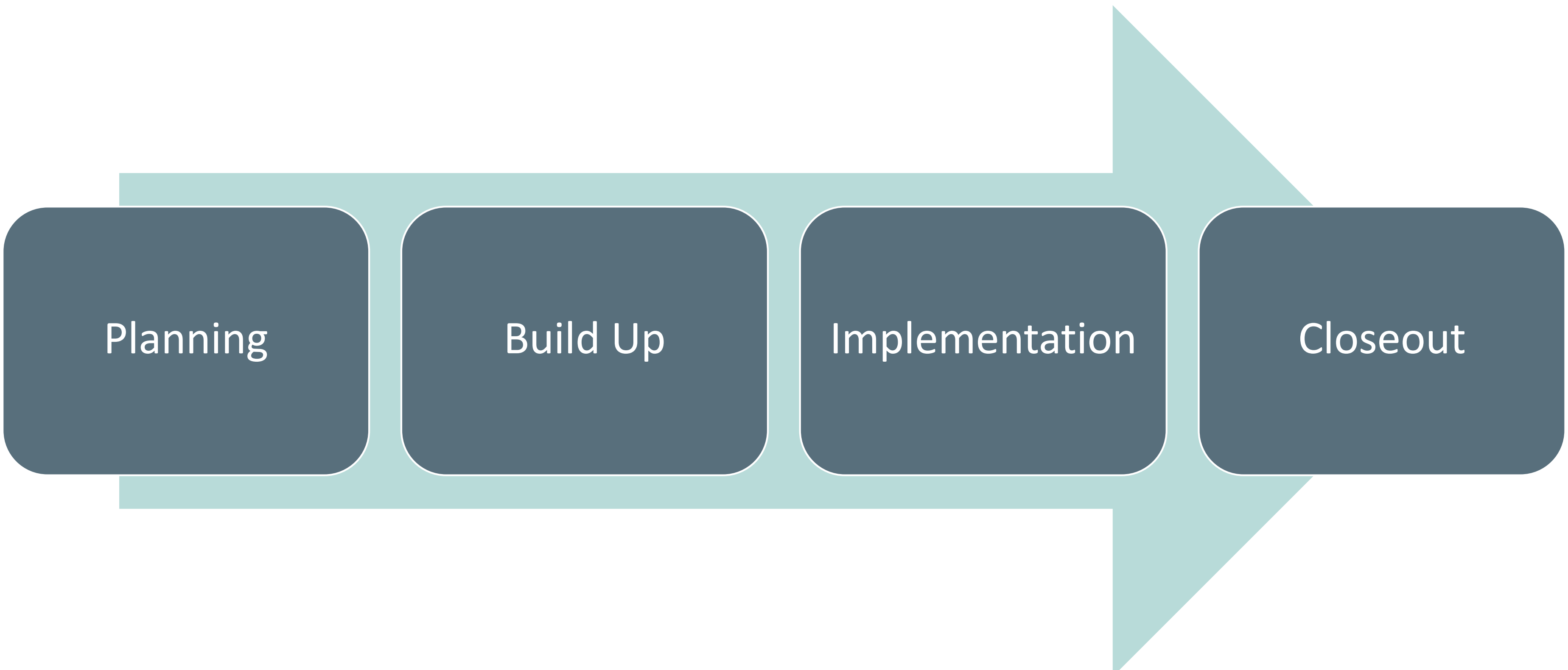
Five Dimensions of PM Performance

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

Remember 6P:
Proper prior planning
prevents potential problems.

PERCEPTION
LEARNING

Elements of Context

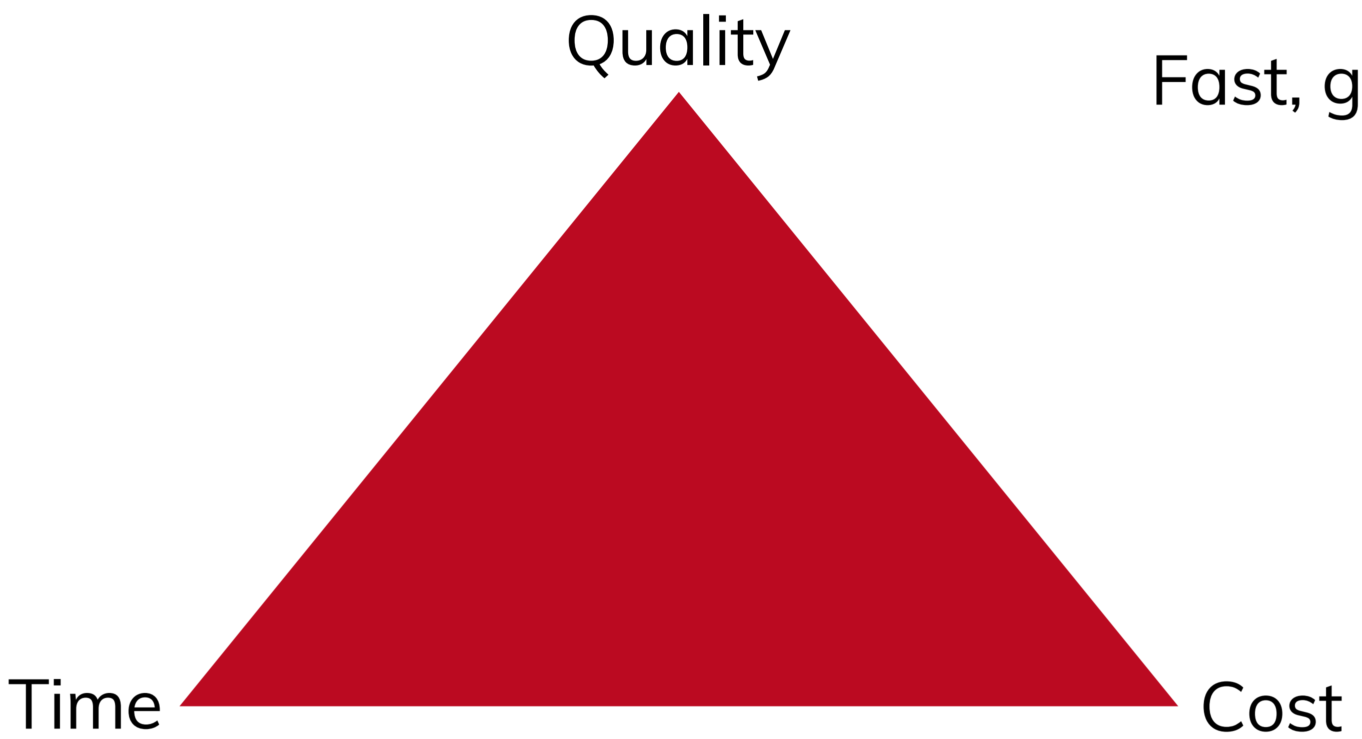
Problem	Goal
Environment	Task

Project Context

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



Fast, good, or cheap...

...pick two.

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

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

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.

RACI Process

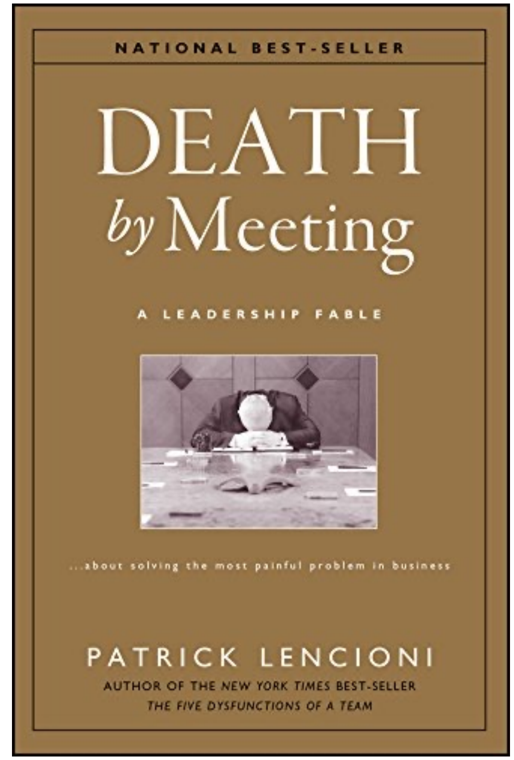
	Person A	Person B	Person C	Person D
Task 1	R	A/C	C	I
Task 2	C	C	R	A
Task 3	I	I	A/C	R
Task 4	C	A	I	R

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

DAILY CHECK-IN

Purpose is to share daily schedules and activities. When in person, this is done standing up to encourage speed. Sometimes called a huddle meeting.

NTE 5 minutes

WEEKLY TACTICAL

Purpose is to review weekly activities and to resolve tactical obstacles and issues. Pull strategic issues out and setup a separate strategic meeting.

45-90 minutes

MONTHLY STRATEGIC

Purpose is to discuss, analyze, brainstorm, and decide upon critical issues affecting long-term success. Spend 1-2 hours per topic, avoiding tactical talk.

2-4 hours

QUARTERLY OFFSITE

Purpose is to review strategy, industry trends, competitive landscape, key personnel, and team development. Focus on work, limiting social interactions.

1-2 days

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

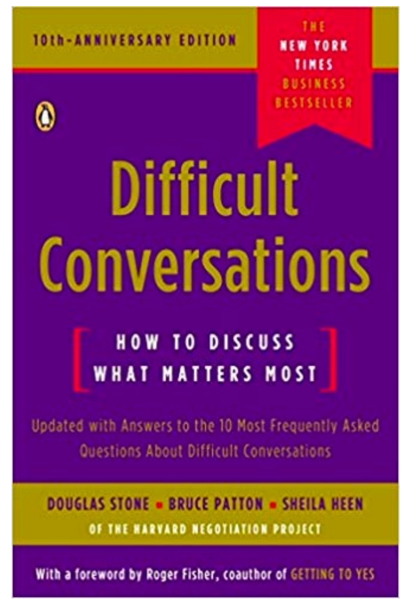
- What do you want?
- Who do you want it from?
- What are the conditions of satisfaction?
  - What are the timelines?
  - What is the definition of done?
- What is the context surrounding the request?

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

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?

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

Five Dimensions of PM Performance

Efficiency

- Meeting schedule
- Meeting budget
- Yield
- Other efficiencies

Customer Impact

- Meeting requirements
- Benefit to customer
- Extent of use
- Customer satisfaction
- Enhancing long-term customer relationships

Team Impact

- Team satisfaction
- Team morale
- Skill development
- Team member growth
- Team member retention
- No burnout

Organizational Success

- Stakeholder influence
- Budgetary impacts
- Service quality
- Cycle time
- Organizational measures

Future Impact

- New technology
- New market
- New product line
- New core competency
- New org capability

Thank you!

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