PERCEPTION LEARNING

How To: Effective Project Management
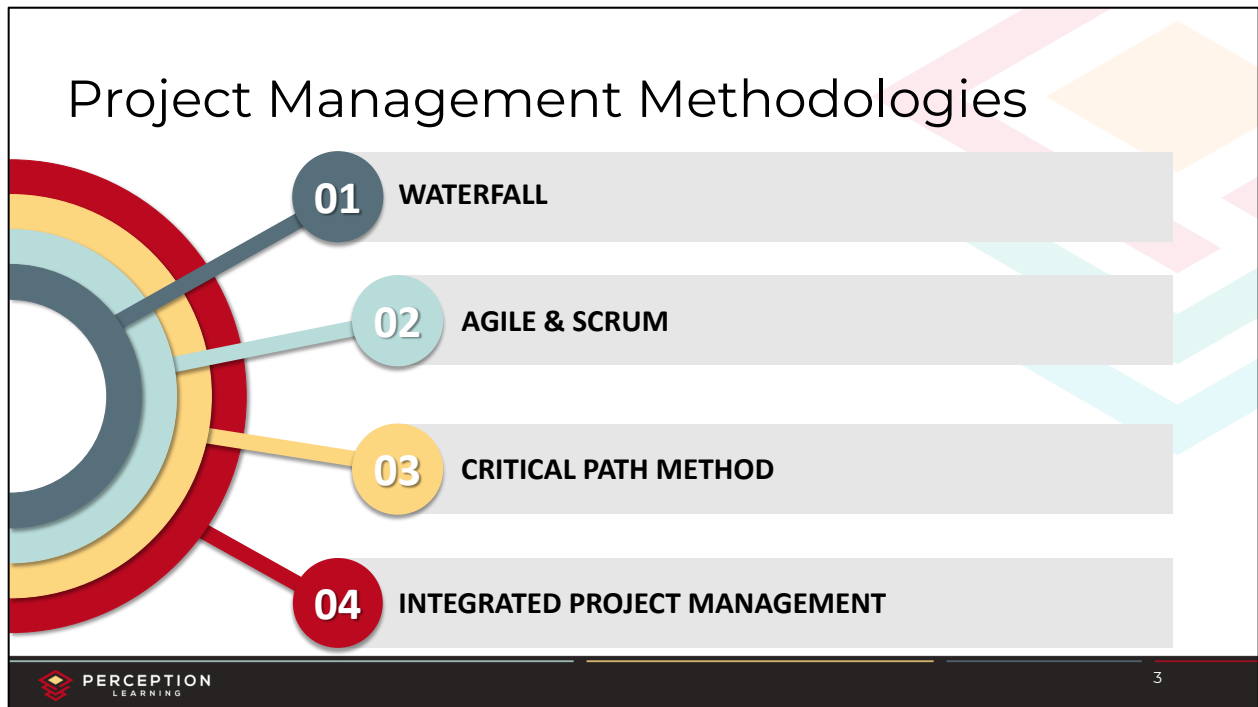
Participant Companion

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Project Management Overview

Project Management Methodologies

- 01 WATERFALL
- 02 AGILE & SCRUM
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Resources to Learn More:

The Definitive Guide to Project Management Methodologies.
https://www.workamajig.com/blog/project-management-methodologies

Agile and Scrum Information. https://www.scrumalliance.org/

Agile Certifications and Workshops. https://www.excella.com/training

Project Management Body of Knowledge (PMBOK). https://www.pmi.org/pmbok-guide-standards/foundational/pmbok

The ABCs of the Critical Path Method. https://hbr.org/1963/09/the-abcs-of-the-critical-path-method

Mastering Project Management Reference. https://hbr.org/product/mastering-project-management-set/1076BN-BUN-ENG

Core Skills for Project Management

Influence

Priority Management

Clear Communication
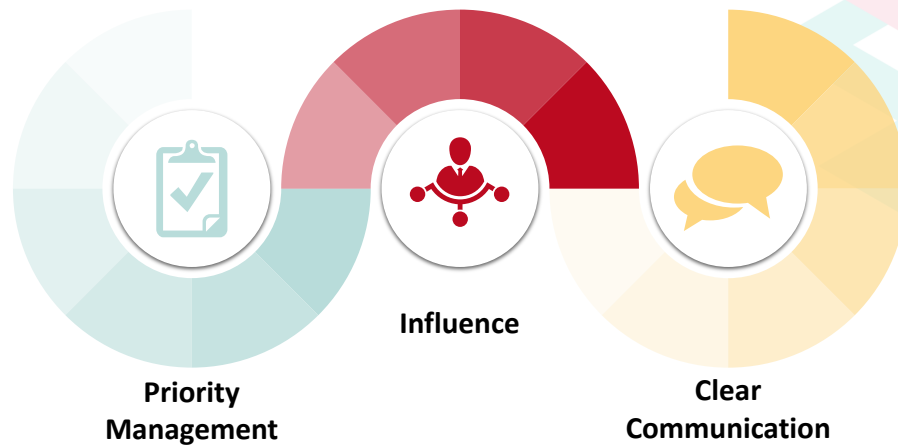
Priority Management

Know Your Priorities

- It is very difficult to manage your time if you do not know what is important
- Highly successful (and strategic) people take time to formalize their personal purpose, vision, and goals
- Know what your work actually is and what is involved
- Ask yourself, "What is most important to me to be doing at this time?"

Model for Identifying Priorities

Questions to Facilitate Reflection

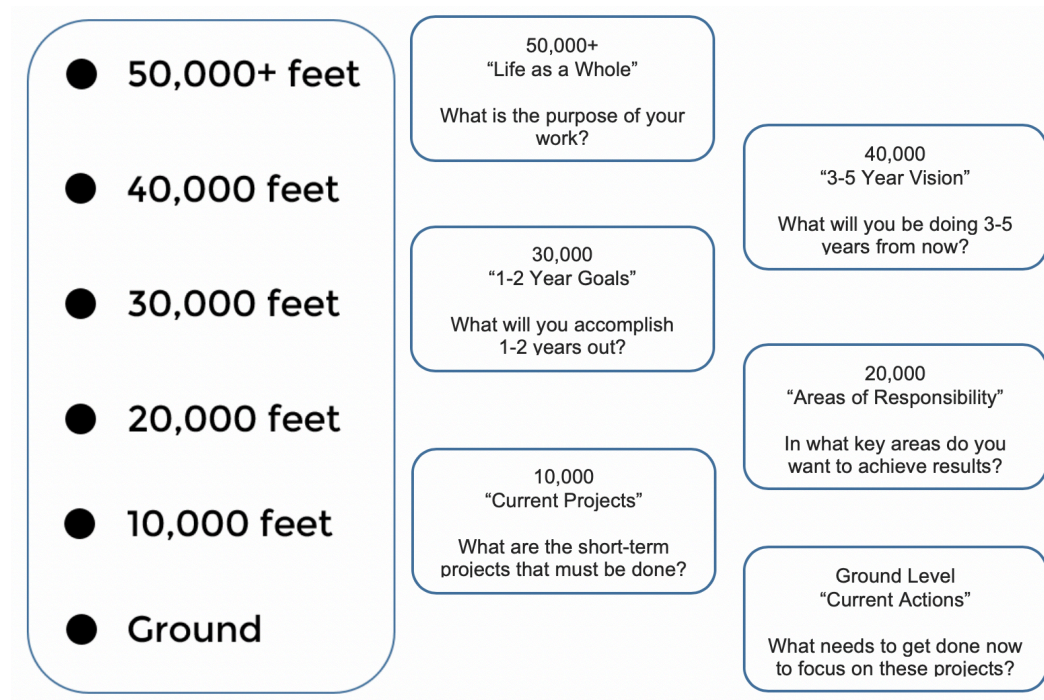| 50,000+ or Life as a Whole	• What is the purpose of your work? • Do you live to work or work to live? • In 20 years, when someone asks you about your career, how do you want to describe it? • How does your work enhance your personal life? Vice versa? • What kind of impact would you like your work to have?
40,000 or 3-5 Year Vision	• What will you be doing 3-5 years from now? • What kinds of career moves are you considering making? How do those enable your 50,000 foot view? • How do you want to grow/develop professionally?
30,000 or 1-2 Year Goals	• What will you accomplish 1-2 years out? • What do you need to accomplish to position yourself to achieve your 40,000 foot view? • What goals are you already working toward that you expect to conclude in the next 1-2 years? • How do your goals align with or depart from your work unit?

20,000 or **Areas of Responsibility**	• In what key areas do you want to achieve results? • What falls into your roles and responsibilities based on your position description? • What do you take on (whether it is in your PD or not) to position yourself to accomplish your 30,000 foot view? • What is the most significant thing(s) that your boss depends on you to accomplish? • What is the most significant thing(s) that your colleagues depend on for you to accomplish?
10,000 or **Current Projects**	• What are the short term projects that must be done? • What are the sources of the largest, regularly occurring time commitments on your calendar? • What are the projects that you should care for in order to accomplish your 20,000 foot view?

White Board Technique

• Identify the "big buckets" of work for which you are responsible (think about your 20,000' view)

• Under each bucket, list the specific projects (think about your 10,000' view)

• Organize these priorities on the outside of your "white board"

• Use the middle of your "white board" to pull down your weekly and daily tasks (think about your ground-level view)

White Board Method Example
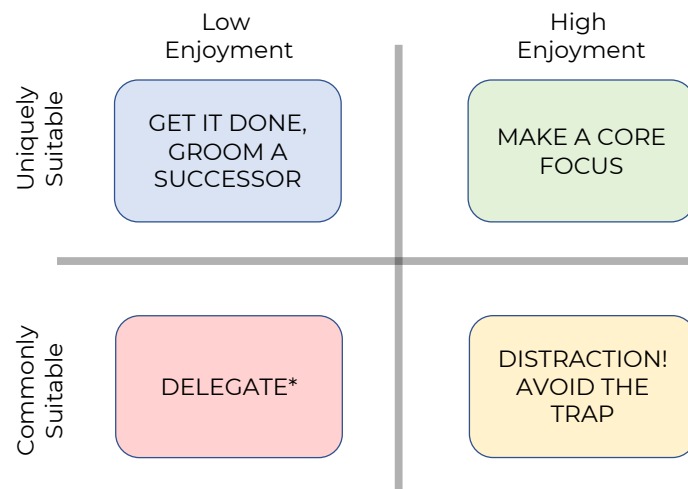
Team	Discuss roles and responsibilities with Sophia and Pedro (Wed)	Projects
Sophia		Marketing Report
Phillip	Schedule stay interview with Tomeeka (Tue)	HIP Campaign
Pedro		Financial forecast
Tomeeka	Reach out to Richard in Legal for advice (Mon)	

Team
Sophia
Phillip
Pedro
Tomeeka

Partner Divisions
Legal
OSEC
MGT

Management
Perf Mgmt
Career Dev

Discuss roles and responsibilities with Sophia and Pedro (Wed)

Schedule stay interview with Tomeeka (Tue)

Reach out to Richard in Legal for advice (Mon)

Schedule midpoint check in meetings (Mon)

Finish final review of the marketing report (Th)

Send out Budgeting email to office (Wed)

Talk to boss about applying time management techniques with the work group (Fri)

Projects
Marketing Report
HIP Campaign
Financial forecast

Internal Initiatives
Budgeting
Strategy

Self
IDP/Training
Goal-setting
Networking

Cook Prioritization Matrix

	Low Enjoyment	High Enjoyment
Uniquely Suitable	GET IT DONE, GROOM A SUCCESSOR	MAKE A CORE FOCUS
Commonly Suitable	DELEGATE*	DISTRACTION! AVOID THE TRAP

Your Boss's World

- Everyone reports to someone–we all have a "boss"
- Everyone, including the boss, has a job to do
- Your work (and your team's work) is connected in some way to the job that your boss needs to do
- BUT – your work (and your team's work) is not the only thing that is important to your boss
- Understanding your boss's goals and pressures beyond how they connect to your work is foundational to managing up

Environmental Scanning

- What are your boss's organizational and personal objectives? Why are these things important to them?
- How do these organizational and personal goals matter to where the organization is headed?
- What are your boss's pressures, especially those from their own boss and others at the same level?
- What motivates and energizes your boss?
- What frustrates and zaps the energy from your boss?
- What are your boss's long suits and blind spots?

Motivational Currencies

Inspiration-Related Currencies

Vision	Being involved in a task that has larger significance for unit, organization, customers, or society
Moral/ethical correctness	Doing what is "right" by a higher standard than efficiency
Excellence	Having a chance to do important things really well

Task-Related Currencies

Challenge/learning	Getting to do tasks that increase skills and abilities
Organizational support	Receiving overt or subtle backing or direct assistance with implementation
Information	Obtaining access to organizational or technical knowledge
New resources	Obtaining money, budget increases, personnel, space, and so forth
Assistance	Receiving help with existing projects or unwanted tasks
Rapid response	Getting something more quickly

Position-Related Currencies

Recognition	Acknowledgment of effort, accomplishment, or abilities
Visibility	The chance to be known by higher-ups or significant others in the organization
Reputation	Being seen as competent, committed
Insiderness/importance	A sense of centrality, of belonging
Contacts	Opportunities for linking with others

Relationship-Related Currencies

Acceptance/inclusion	Feeling closeness and friendship
Understanding	Having concerns and issues listened to
Personal support	Receiving personal and emotional backing

Personal-Related Currencies

Gratitude	Appreciation or expression of indebtedness
Ownership/involvement	Ownership of and influence over important tasks
Self-concept	Affirmation of values, self-esteem, and identity
Comfort	Avoidance of hassles

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?

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Possible Response - Agreement

- Occurs when a request or offer is met with a "yes"
- We can (and must!) actively "manage our commitments"
- Organizations are collections of agreements – this is how we coordinate work
- Affects our relationships and trust if we break or have missing agreements

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Possible Response – No and Renegotiate

- When the response is no, find out more information
- Ask questions to determine why the answer is no:
  - What are you currently working on?
  - What is your workload like?
  - What are your current deadlines?
- If this is a top priority, work with them to rebalance their workload so they can accomplish this task
- If it is less of a priority, work with them to fit it into their longer term schedule
- If after renegotiating the answer is still no, they are still not off the hook yet – work with them to figure out an alternative solution

Clarifying the Response

Unclear Response	How to Clarify
"I'll try my best, but I have a lot going on." or "I'll see what I can do."	"Would you be able to let me know by 3 pm today if you can meet that deadline?"
"No, I don't think I can meet that deadline. I have a lot of high priority projects."	"When do you think you might be able to complete this action?"
"I *think* I can get this done by next Wednesday."	"Would it be ok if I checked with you on Friday afternoon to see if we're still on track to meet the Wednesday deadline?"

Making Time

Taming Email – Bottom Line Up Front (BLUF)

Email is a very convenient tool for quickly getting messages to one another. But, with so many people sending and receiving email, your message can get lost in the shuffle. Get what you need faster by starting your email with BLUF. Here's an example.

To: Bob@yourorganizaton.com

From: Jose@yourorganization.com

Subject: Action Needed – Decision to Proceed

Good afternoon Bob,

BLUF: By 5:00pm today we need you to decide whether or not we are going to book the Loews Portofino Bay Resort at Universal Orlando for the upcoming Advocacy Conference.

Below are the latest arguments that the team has discussed.

Argument 1 –

…

…

Taming Email – Mastering Subject Lines

Interoffice email can take on a life of its own without proper management. Help everyone by introducing some discipline into your subject lines. Consider using the following shorthand to give the reader a sense for what you need.

- FYI: Use this when information is purely for your information and no action is required. The reader can put this lower on their priority list and move on to more pressing matters.
- NRN: This stands for "no reply needed" and can be used instead of FYI.
- Action: Use this when you need the recipient to act on the email. Then, be sure to put the action required as your BLUF in the body of your text.
- EOM: Sometimes, you can convey what you need in the subject alone. When this is the case, consider putting the short message as your subject line and ending it with EOM. For example, "FYI: We are out of paper. EOM"
- Project A: If you are working with a group of people on an effort, noting the name of that effort in the subject line can help someone easily find your email later. It also allows people to set up rules (see below) that will automatically file the email based on the subject line.

Taming Emails – Low Tech If This Then That (IFTTT)

With technology, IFTTT refers to a way people create chains of simple conditional statements (e.g., if I come home, then turn on the lights). You can use this same technique to reduce the number of emails that you get in a day. Essentially, using IFTTT for emails means thinking about the potential responses you might get for an email and offering up conditions to your recipient so they can continue to move things along. Considering using some of the following stock language in your emails to significantly reduce your back-and-forth.

- *Would you be open to a meeting to discuss this further? If so, please provide a few dates and times that work well with your schedule and I will send a meeting invitation. If not, could you please provide me your comments via email by Wednesday at 5:00PM EST?*

- *Do you need to do another review of the draft before it is finalized? If so, please let me know how much time you need so I can build it into the schedule. If not, I will plan to send the draft out on Friday.*

- *I need some clarification on the data you sent over, specifically around the sources. Could you please clarify whether the data came from a government source or a private source? If government, I'll need to know the agency and point of contact. If private, I'll need to know any potential conflicts of interest we might need to report alongside the data.*

Taming Emails – Inbox Rules

The "Create Rule" feature allows you to organize incoming emails, organize sent messages, or notify yourself. Below are a few common rules that busy project managers implement for their email management.
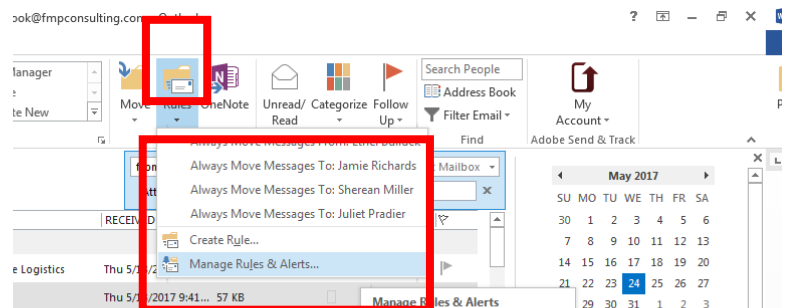
- If you have a stakeholder that is particularly important, you can set up a rule to send all emails from that person to a "Read Now" folder.
- If you are involved in a project that involves people from different email servers but the subject always contains the name of the project (e.g., Project A), then you can create a rule to file all emails with that in the subject line to a specific folder (e.g., Project A).
- If you are coordinating inputs from a large group of people, you can auto-file their replies into a folder that you can sort through at a more convenient time

Improving Meetings – Minimizing Your Meetings

Studies suggest that the average office worker spends 35-50% of their work week in meetings. If meetings are taking over your calendar, use the following tips to reduce the time you spend in meetings.

- If your role or expected contribution for the meeting isn't clear, ask the organizer to clarify. If he or she still can't explain your role, don't attend.

- If the meeting is to provide feedback on a work product, ask for a pre-meeting look at the agenda so you can pass your comments on to the facilitator versus you attending in person.

- Delegate the meeting to a member of your team when they can represent the team's position on the issues being discussed.

- Reduce the length of the meetings you schedule and always create an agenda to ensure you are spending your time wisely.

- Don't schedule meetings for FYI items you can communicate via email. Only use meetings for discussions and decisions that must happen with a team, in real time.

Improving Meetings – Making Your Meetings Better

Start on time. Always start your meetings on time. When people arrive late and see the meeting has not started, or if the meeting is stopped to bring latecomers up to speed, there is little incentive for them to arrive on time for future meetings. Starting on time is a show of respect and helps ensure that all agenda items will be covered.

End on time. Always end at the appointed time. If important issues still need to be covered, jointly decide whether to continue the meeting (and for how long) or to reschedule. The decision to continue or to reschedule should be made by consensus.

Have a clear agenda. An agenda serves no purpose unless the group adheres to it, so it is important to track the agenda items as they are discussed and get closure on each item before going on to the next item.

- If members of the group want to deviate from the written agenda, the leader should check for consensus among all the group members

- When new topics, concerns or actions are brought up that are not part of the agenda, they should be recorded on a flip chart for discussion at another time so that they are not lost. Some groups refer to this list as a "Parking Lot" where important ideas or questions are "stored" until they are addressed as part of a future agenda.

Set clear objectives. State the desired objectives in a way that describe the desired result. A meeting may have multiple purposes, each with specific agenda items. If this is the case for your next meeting, be sure there is a clear connection between the meeting's purpose(s) and each agenda item.

Clarify roles and expectations. Limit attendance to those whose buy-in or presence at the meeting is critical. One of the most common causes of ineffective meetings is "over-inviting" so that no one feels excluded. The result is poor decision-making. Larger than necessary groups are particularly detrimental when consensus-based decision-making is called for. Remember to focus on the meeting's objectives when choosing participants. As you select participants, it is also important to identify what role they should play at the meeting. Make sure to clarify roles and responsibilities to each participant in the invitation.

Organize your resources, equipment, and logistics. Review the objectives and identify any potential time constraints. Consult the calendar and consider possible conflicts, workload, and the schedules of essential colleagues. Ensure that colleagues have adequate time to prepare. Based on your meeting's objectives and the group's size, decide what type of space and materials or supplies will be needed (e.g., projector, screen, computer, conference phone, microphone, flip-charts, markers, etc.). Assess whether you need internet access or technological support. If your intent is to generate new ideas or resolve very complicated issues, an off-site location might be best. In some instances, a neutral facilitator may be needed to run a meeting effectively. If meeting off-site or using a facilitator, factor budget constraints into your planning.

Maintain a collegial and outcome focused atmosphere. When it aligns with a meeting's objectives, active participation among group members often leads to the best thinking and results. Follow these tips to promote participation in discussions and decisions.

- Provide background information prior to the meeting so that colleagues have enough context to contribute

- Start with less complicated or controversial agenda items

- Ask open-ended questions. If appropriate, plan your questions in advance

- Observe the group. Are some participants dominating the discussion? Are others silent? Use tactful communication techniques to quiet the dominant colleagues –

- Welcome new ideas and suspend judgment

- Ask for alternate points of view

End the meeting with clear agreements and assigned actions. Decisions made during group discussions should also be tracked and included in the post-meeting documentation that is sent to all participants. Tracking and reporting decisions reminds colleagues of the agreements made. It can also be referred to in future meetings in case confusion arises.

Managing Distractions – Preventative Measures

As the old saying goes, proper prior preparation prevents potential problems. Get ahead of distractions and interruptions by setting yourself up for success. Incorporate these tips to remove temptation and to improve your ability to focus.

- Isolate yourself – close the door, put up a sign, or work in a conference room during planned "heads-down" time

- Don't feel obligated to keep an "open door." Open door does not mean "always available," it means open communication

- If possible, move any materials or files used by others to another area

- If possible, change the orientation of your desk away from office traffic

- Turn off email notifications in Outlook

  - ☐ On the **File** tab, choose Options > Mail

  - ☐ Under **Message arrival**, clear the **Display a Desktop Alert** check box

  - ☐ To change the transparency of Desktop Alerts or how long they're visible, choose **Desktop Alert Settings**

Managing Distractions – Dealing with Walk-ins

A collaborative work environment is important to fostering high quality results. One drawback of a collaborative environment is the walk-in visits from colleagues to ask questions, to brainstorm, or to build rapport. Maintain your boundaries while still being a supportive colleague by incorporating the following tips into your routines.

- Ask, "How can I help you?" instead of, "How are you doing?"

- If it isn't urgent (for you or them), ask if they are available later in the day to chat

- If it is urgent (to them), ask how much time they will need and try to stick to the time allotted

- Stand up; it prevents someone from settling into your space

- Be honest; let people know if you are in the middle of a working session and how much time you have for them now

Managing Distractions – Good Habits and Training Others

We train other people how to behave with us. If you consistently allow people to push your boundaries, they will learn that your boundaries don't mean much to you. On the other hand, if you respectfully maintain your boundaries and build in good routines, others will learn to respect your space and your workflow. Try using the following tips to improve your habits and reinforce productive expectations.

- Be consistent with how you protect your time by setting aside a certain time of day for "heads-down" work

- Spend at least 30 days protecting your regularly scheduled work time to get others used to respecting your space

- Share your workflow with your colleagues so they know where your attention is focused during the week

- Use consistent indicators when you are available or when you are not available so people know when to stop by or when to hold off

Managing Distractions – Saying "No" Diplomatically

When you try to be all things to all people, you end up doing all of it poorly. Saying no helps you keep space in your schedule so that you can focus on the things that really matter. At the same time, only ever saying no can generate a reputation of being someone who doesn't play well on a team. Find a middle ground by adopting some of the following tips.

- When saying no, do your best to help the other person find an alternative solution that will be a good substitute

- Understand that others can't read your mind or see the other priorities you have on your plate; explain the conflicts and your reasoning behind your prioritization

- When saying no to someone more senior than you, provide suggestions or alternatives that can help solve the problem/issue at hand

General Shortcuts – Keyboard Shortcuts for All Windows Programs

Keystroke	Action
<Alt> <Tab>	Switch between open window applications
<Windows Key> <Left Arrow>	Move the open window to the left half of the screen (split screen)
<Windows Key> <Right Arrow>	Move the open window to the right half of the screen (split screen)
<Windows Key> <Up Arrow>	Maximize the open window
<Windows Key> <Down Arrow>	Minimize the open window
<Windows Key> L	Lock the workstation
<Windows Key> M	Minimize all windows
<ALT> <F4>	Quit the current program

General Shortcuts – Keyboard Shortcuts (Outlook Specific)

Keystroke	Action
<Ctrl> <Shift> k	Create a new task
<Ctrl> <Shift> a	Create a new appointment
<Ctrl> <Shift> n	Create a new note
<Ctrl> <Shift> m	Create a new email message
<Ctrl> <Shift> e	Create a new email folder
<Ctrl> <Shift> v	Move an email message
<Ctrl> <Shift> c	Create a new contact
<Ctrl> 1	Switch to mail
<Ctrl> 2	Switch to calendar
<Ctrl> e	Go to the search box
<Ctrl> r	Reply to open message
<Ctrl> <Shift> r	Reply to all
<Ctrl> f	Forward an open message

General Shortcuts – Time Saving Shortcuts for Mac

Keystroke	Action
<Cmd> c	Copy the selected item to the clipboard
<Cmd> x	Cut the selected item to the clipboard
<Cmd> v	Paste what is on the clipboard to the cursor location
<Cmd> z	Undo
<Cmd> y	Redo
<Cmd> w	Close a window
<Cmd> h	Hide all windows of your current application
<Cmd> a	Select all in an application (text, images, everything)
<Cmd> <Shift> 3	Take a screen shot of the whole screen
<Cmd> <Shift> 4	Trigger crosshairs so you can select part of the screen to capture
<Cmd> <Shift> <Option> V	Paste to match the destination formatting
<Cmd> <Shift> d	Open your "desktop" folder
<Cmd> <Shift> l	Open your "downloads" folder
<Cmd> <Shift> o	Open your "documents' folder
<Cmd> <Shift> r	Open your "AirDrop" folder

Project Management Applications

Basecamp	**Pros**: simple interface, straightforward project management approach
	Cons: lacking integrated features like chat and time tracking, not good for very complex projects
Teamwork	**Pros**: sophisticated search, milestone tracking, integration with 3rd party apps
	Cons: expensive if you need a lot of data storage
Asana	**Pros**: Easy to use, integrates with everything, handles complex tasks well, full suite of features
	Cons: expensive after the trial period ends

Thank you!

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About Perception Learning

When we spend about one-third of our lives at work, we need to make it count. Perception Learning exists to help people be their very best at work and in life. We give employees the skills they need to thrive. We help leaders improve the ways they serve their teams. We help organizations get better results so they can provide exceptional careers for their people.

Achieving this can't just consist of "sending people to training." We have to create learning experiences that are meaningful, fun, and enduring. We have to ground the learning experience in the real world, and we have to reinforce it regularly. We have to make sure that this experience actually turns into change.

And we have to do this because when people can bring their best to work and contribute to something bigger than themselves, a big part of our lives becomes tangibly better.

Life is too short for bad training.
www.perceptionlearning.com

About Stacy Cook

Stacy Cook is a dynamic speaker, trainer, and organizational development consultant focused on practically creative solutions to challenging, real-world problems. She has conducted over 3,000 hours of classroom training on subjects related to performance management, resilience, presentation skills, meeting effectiveness, leadership development, coaching skills, workforce planning, and many more. Ms. Cook holds a Bachelor of Arts degree in Political Science, International Studies, and Russian Language and Literature from the University of Wisconsin. She also holds a Master of Arts in Adult Learning and Leadership from the Teachers College of Columbia University in New York City.