Welcome

Project Management Fundamentals: PM10G

Important

Please check-in with your instructor as soon as you arrive...

Your completion certificate for the
PM Orientation PM54D
must be verified by the instructor
before you may be admitted into this class.

Welcome

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Opening

Introductions

1. Your name
2. The city where you live and the city where you work
3. How long you have been in a PM role?
4. Key learning objectives for this class

PMF Agenda

Day 1

AM

Module 1 Getting Started and Defining the Project

PM

Module 2 Organizing the Team and Planning for Communication

Module 3 Stakeholders and Requirements

Day 2

AM

Module 4   Creating Hierarchical Decomposition Structures

Module 5   Risk Management

PM

Module 6   Estimating

Module 7   Creating a Project Schedule

PMF Agenda

Day 3

AM

Module 8	Understanding Change Management
Module 9	Executing and Controlling a Project

PM

Module 9	S**even Keys Simulation**
Module 10	Project Reviews and The 7 Keys
Module 11	Closing the Project
Module 12	Course Wrap-up and Exam

PM Feedback

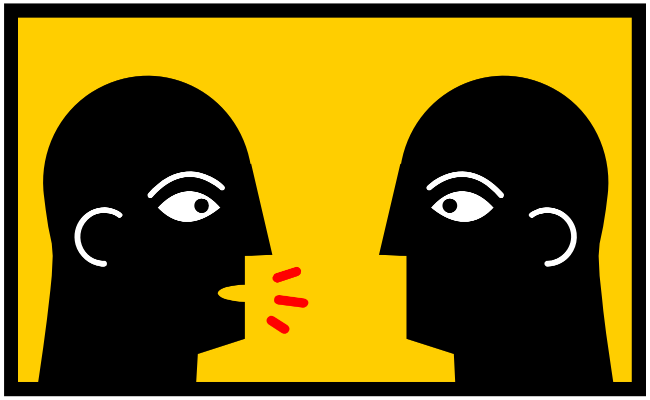
- During the case study activities, each participant will act as the Project Manager one or two times.
- During each activity, the rest of the team will evaluate the PM using the assessment form.
- Identify what the Project Manager did well and make constructive suggestions.

Receiving Feedback

- Breathe
- Listen and do not interrupt
- Ask for clarification
- Paraphrase, summarize
- Acknowledge valid points
- Sort out what you heard

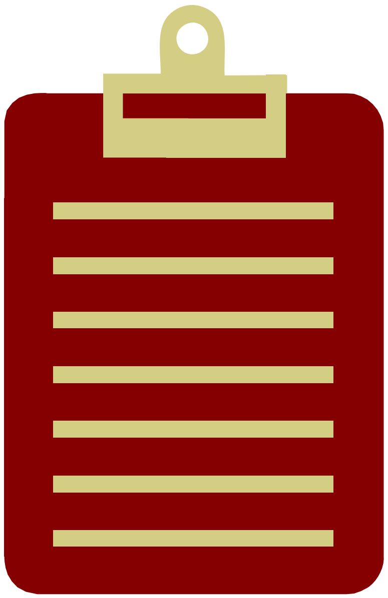
Giving Feedback

- Give both the positive and "even better if"
- Catch people doing something right
- Be descriptive
- Speak for yourself, not others
- Stay with known things, not hearsay
- Be sensitive - understand your audience



Administration

- Emergency phone number
- Local emergency exit procedures
- Notes and mobility desks
- Attendance
- Maximum absence
- Sign the Roster every am & pm
- Certificate Request and Course & Instructor Evaluations (both via an e-mail worldwide)



Ground Rules

- Cell phones ... off ... or vibrate only
- Laptops off
- Be on-time
- Others you would like to add?

The Bridge Game - Part 1

Purpose: Experience the project management skills and behaviors that will be applied in this course

Process: Each team has 10 minutes to estimate the time it will take them to build a bridge

Product: Completed Official Bid Form

The Bridge Game - Part 2

Purpose: Experience the project management skills and behaviors that will be applied in this course

Process: Each team builds their bridge within the timeframe they estimated

Product: Completed bridge

The Bridge Game - Debrief

PM Feedback

After the Bridge Game:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback.   Document your lessons learned on page 8 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.

About the Case Study

- World Gymnastics Games Project
- It is representative of an actual project.
- The class is divided into groups.
- Within each group, students play different roles throughout the case study.
- Each student serves as the project manager for different exercises.
- Exercises in the case study relate to the content of each module.

Wrap Up

Module 12

Learning Objectives

Now that you have completed the PMF course, you should be able to manage a project by:

- Using project management skills across IBM
- Applying the Seven Keys to Success™
- Building your project team
- Preparing a useful team charter
- Identifying and validating your project requirements
- Using change management to control requirements
- Preparing a PBS, WBS, and OBS
- Preparing a Risk Management Plan
- Establishing a project estimate
- Creating a project schedule
- Developing and managing project baselines
- Using project management tools to control project execution
- Preparing and executing a project closing

Personal Action Plan

Spend a few minutes thinking about what you have learned.

Complete the Project Management Personal Action Plan

- Identify your PM strengths
- Identify your PM weaknesses needing improvement
- Describe the steps you will to take to improve
- Describe how your supervisor / manager can help you improve

Reminders

Please watch for the IBM e-mail that will contain:

1. The Course and Instructor evaluations
2. The Course Completion Certificate Request

These are important to you and IBM.

Please give us your feedback.

Any Final Questions?

Test Protocol

- Use pencil - completely circle your choice for the correct answer
- Please remain seated until it is your turn at the grading desk ... one person at a time please ...
- Once you receive your results, please leave the room
- Clear everything off the desktops and remove all charts from the walls
- You may begin as soon as you receive your test and answer sheet.

Good Luck!

Module 2

Organizing Teams

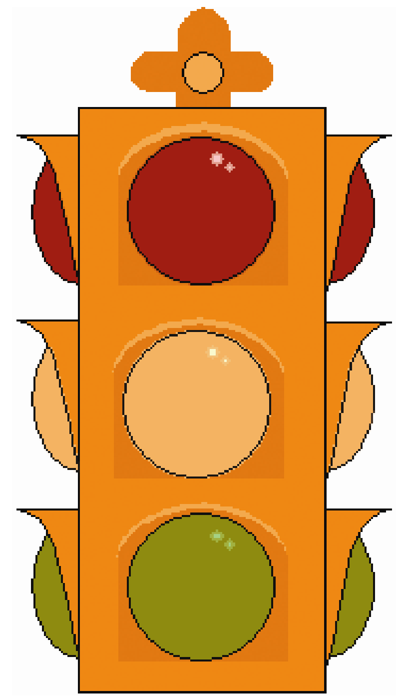
Module 2

Organizing Teams

Team Charter

LL 9 -12

Seven Keys to Success™



What do the colors mean?

Red- urgent - corrective action required immediately
Yellow/Amber – warning - corrective action required in the near term
Green – on course - no corrective action required

Creating an Organized Team

Purpose: Form and organize a new team and create a Team Charter

Process:
Use Case Study and Team Charter handouts, assign project roles, an observer and a PM, and create Team Charter for case study.

Participation: Identified PM leads effort, others assume roles and support PM, team's choice on who will present products

Products: 1) One flip chart with your Team Charter for the case study
2) Comment on how your team organized itself, what you learned about forming and organizing teams, and how you think you could do better in the future

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Team Charter Topics

Some suggested topics:

- Time limit for discussions
- Decision-making process
- How to handle conflict
- How long team works, for example, into lunch, after 5:30
- How team deals with internal issues; for example, dominant or quiet team members
- Assign PM and backup for each module
- Assign roles and responsibilities
- A "Trigger" word to be used to gracefully disengage
- Develop a team name

Team is High Performing

Healthy Signs

- Morale is good
- The team is diverse
- High energy and enthusiasm for the project

Unhealthy Signs

- The tension can be felt
- Turnover is high
- Working conditions are poor

1. Breadth, depth and caliber of PM and team skills are appropriate for all phases.
2. Morale, motivation, energy, and collaboration across teams are high.
3. Environment and facilities support productive and effective teamwork.
4. Roles and responsibilities are clear.

Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.
- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for the Team is High Performing key.

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

Red - Urgent - Corrective action required immediately.
Yellow - Warning - corrective action required in the near term.
Green - Stay the Course - no corrective action required.

Project Name: Interviewee: Date: Interviewer:

Key and Criteria	Noted Issues	Heads Up Display	Proposed Actions
Stakeholders are Committed	➢	Red Yellow Green	➢
Business Benefits are Being Realized	➢	Red Yellow Green	➢
Work and Schedule are Predictable	➢	Red Yellow Green	➢
Scope is Realistic and Managed	➢	Red Yellow Green	➢
Team is High Performing	➢	Red Yellow Green	➢
Risks are Being Mitigated	➢	Red Yellow Green	➢
Delivery Organization Benefits are Being Realized	➢	Red Yellow Green	➢

PM Feedback

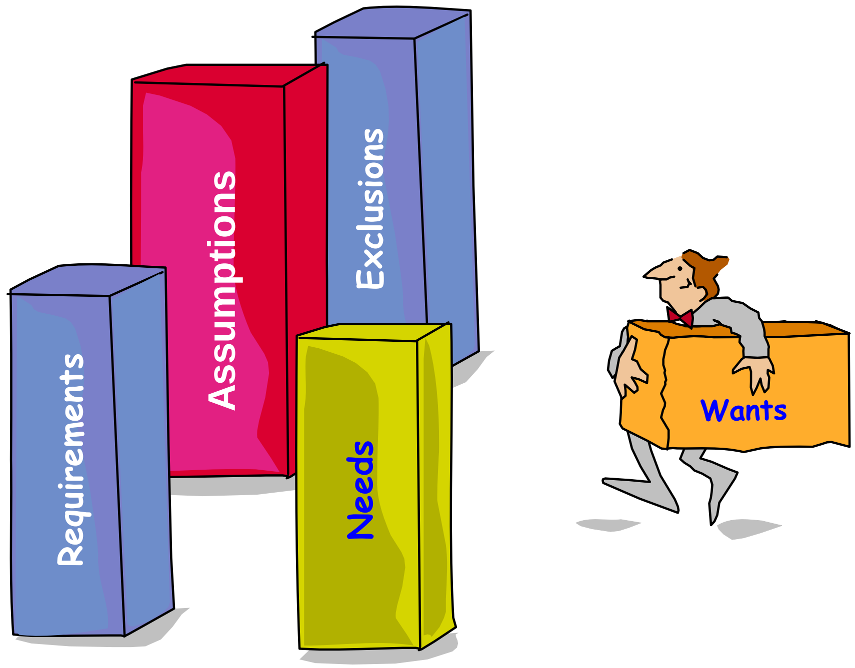
After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback. Document your lessons learned on page 18 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.

Stakeholders and Requirements

Module 3



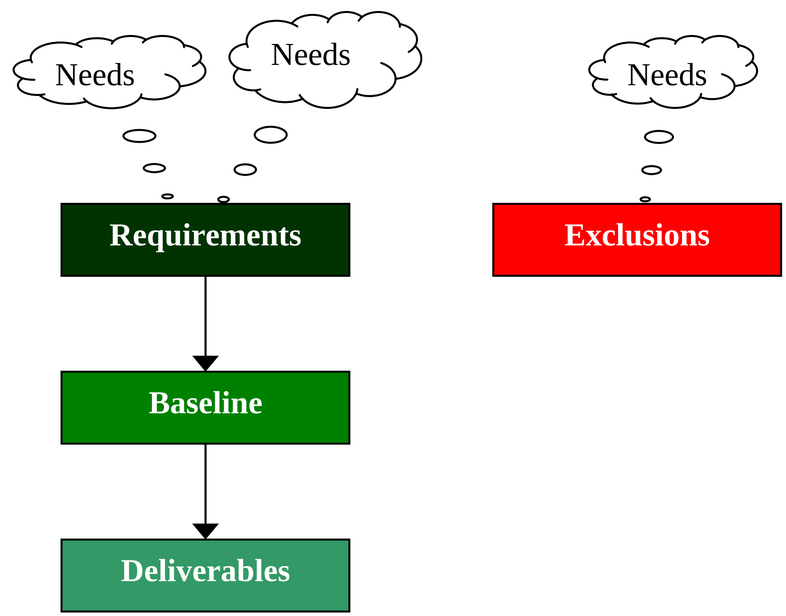
Discussion

Stakeholders

Who?

What do they need?

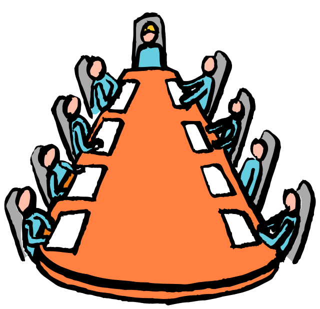
What do we need from them?



Who are stakeholders?

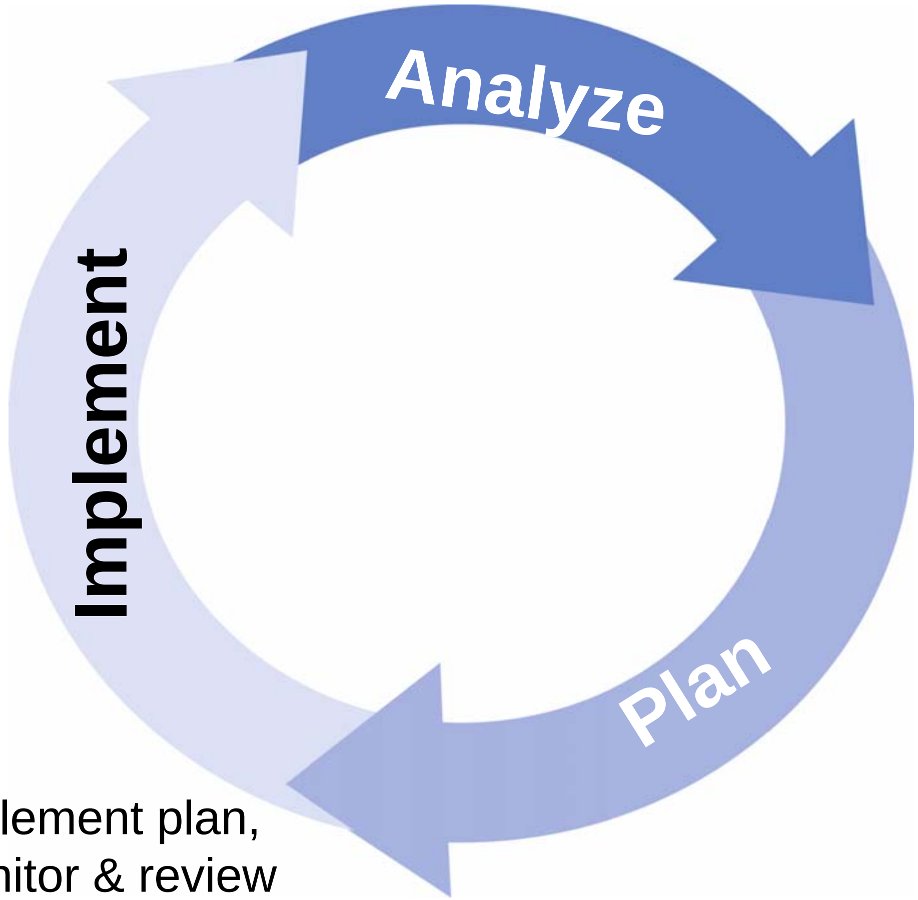
Any group or individual who is impacted by or who could impact the project, such as…

- IBM management
- Your team members
- Other IBM teams at the client site (e.g., other business lines)
- Client sponsor
- Client project manager
- Client team members



- Trade unions
- Employee associations
- Software vendors
- Regulatory bodies
- Media
- Industry influencers
- The client's customers

Stakeholder Management Process



Implement plan, monitor & review

Initial Assessment

- Who are the stakeholders?
- What is their level of influence on the project?
- What is their level of support for the project?

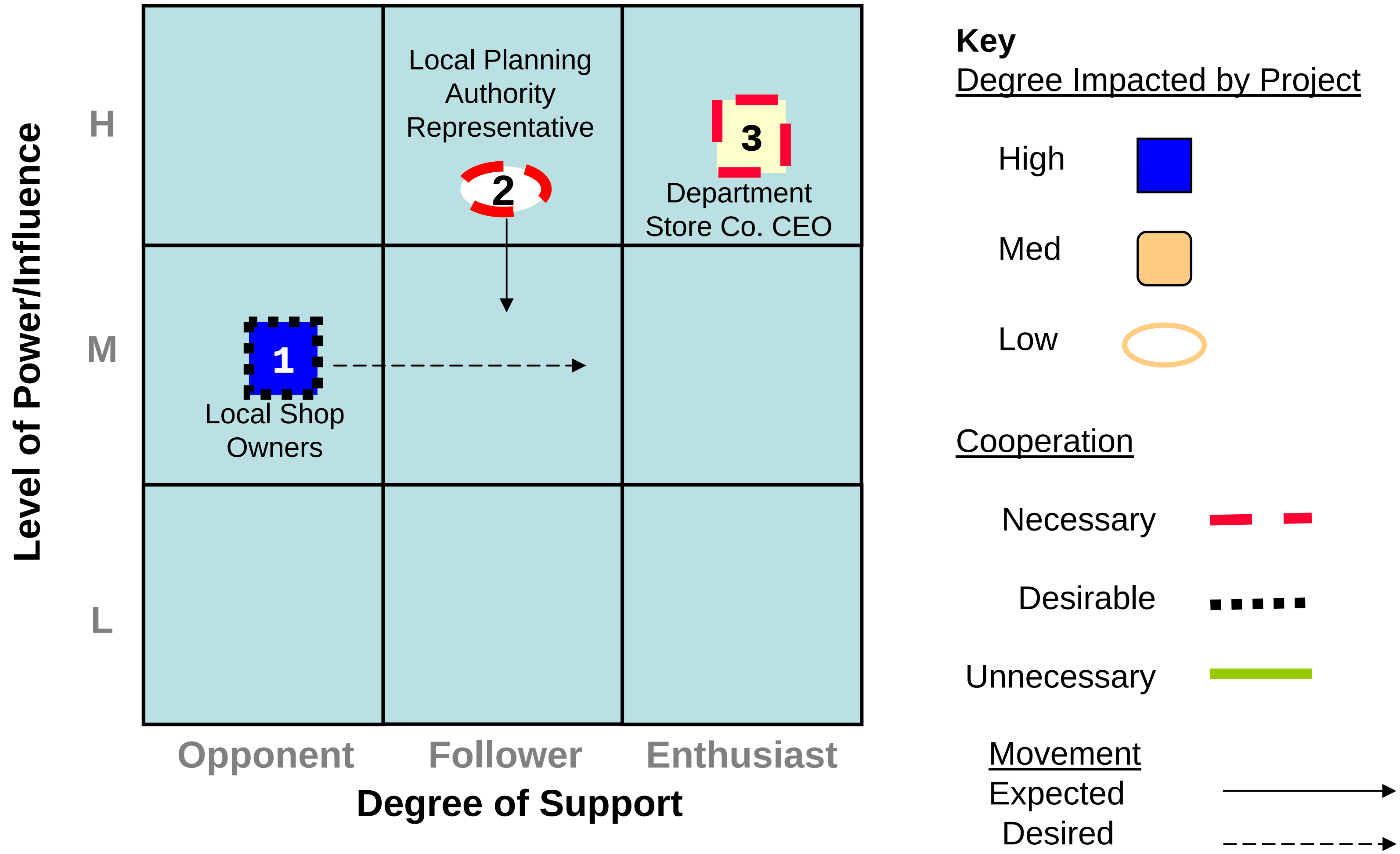
Movement Plan

- How do the stakeholders need to be moved, if at all?
- What will motivate them to move? (What's in it for them?)

Need to ask them questions to accomplish the process !

Stakeholder Mapping

Example: Project to build a new Department Store



Question Types

Use:

- Open questions
- Closed questions
- Probing questions

Avoid:

- Leading questions
- Critical leading questions
- Marathon questions
- Multiple questions
- Ambiguous questions

Stakeholder Mapping Exercise

Purpose:

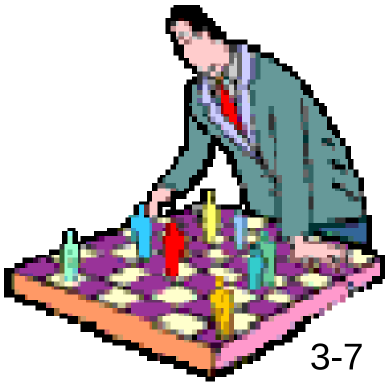
- Practice creating a stakeholder map & movement plans
- Practice applying stakeholder management techniques to move stakeholders according to the movement plan
- Practice gathering customer needs through the practical application of interviewing tools and techniques

Process:

1. Meet a stakeholder (Analyze), ask questions to place on the grid
2. Once placed, decide if they need to be moved on the grid
3. Find out about their requirements & motivations. Begin to develop your Requirements Baseline & Movement (Plan).
4. Based on your interactions with each, work out how they can be motivated to be moved or maintain any favorable grid positions (Plan)
5. Finalize and Implement your Movement Plan
6. Repeat – you will meet between 2-3 different stakeholders

Participation: 2 volunteers to play the stakeholder characters
Rest of class act as one group.

Product: Stakeholder map, movement plan
Stakeholders' key requirements & exclusions



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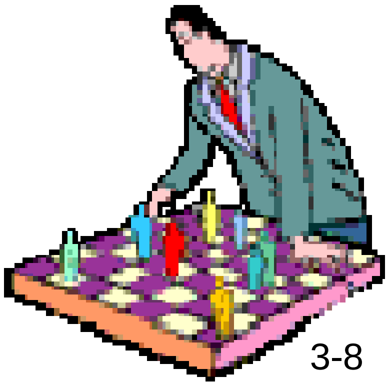
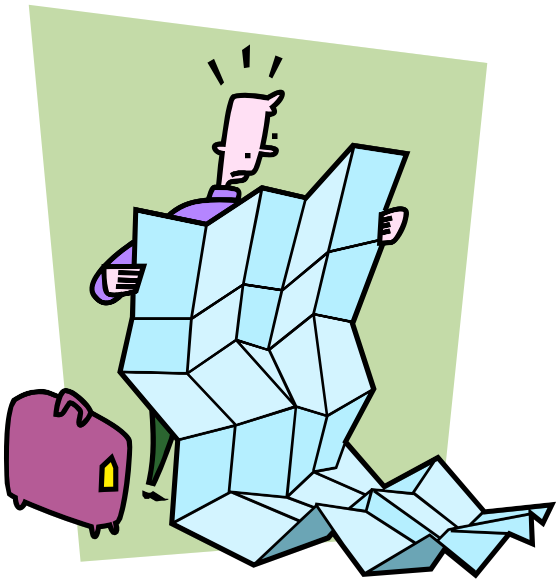


Stakeholder Considerations

- Not all stakeholders need to be moved
- They can move back as well as forwards
- They are subjective – the more data, the more accurate the assessment
- It's never too early to start
- Stakeholder documents are living things
- Stakeholder documents are sensitive – treat with care!
- Communication planning is done based on stakeholder assessments and plans



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Stakeholders are Committed

Healthy Signs

- Executive incentives linked to project results
- Investments in change management and training
- Stakeholder resources dedicated as planned
- Stakeholders engaged as planned

Unhealthy Signs

- Executive sponsor not visible
- Lackluster Stakeholder interest
- People sabotaging efforts
- Resistance to new ideas
- Experts not available

1. Stakeholder management plan is fully implemented and maintained.

2. The right sponsor is appropriately engaged and funded.

3. Regular Steering Committee meetings are being held, decisions and actions are being taken in a timely fashion and are effective.

4. All appropriate stakeholder groups are effectively represented and engaged.

Create the Requirements Baseline

Purpose:

- Practice creating a Requirements baseline using data gathered through stakeholder interaction and reading Project Documentation
- Practice categorizing the needs into requirements & exclusions.

Process: See the diagram.

Participation: Table Teams

Remember to assign a Project Manager

Product: Use a flip chart to generate a:

List of Requirements,list of exclusions, list of assumptions

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Business Benefits are Being Realized

Healthy Signs

- A compelling reason to implement
- The solution doesn't have to be fancy
- Before and after difference can be measured

Unhealthy Signs

- "Why are we doing this?"
- Time is not important
- Cost is too important

1. The business case is clearly and convincingly articulated.

2. The solution will appropriately support the desired outcomes and costs.

3. The quality of work products is appropriate.

4. Benefits tracking is ongoing and meaningful.

Tips on Business Benefits

- “Benefits” depend on the perspective of the individual/group undertaking the analysis, so...

- What may appear to be a benefit for one business area may be a drawback for another

- Make sure benefits are agreed up front by the relevant stakeholders

- Do not commit to benefits that are beyond our control (e.g., those that may take a long time to be fully realized, that depend on many external factors)

Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.

- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for Stakeholders, Business Benefits, and Team

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

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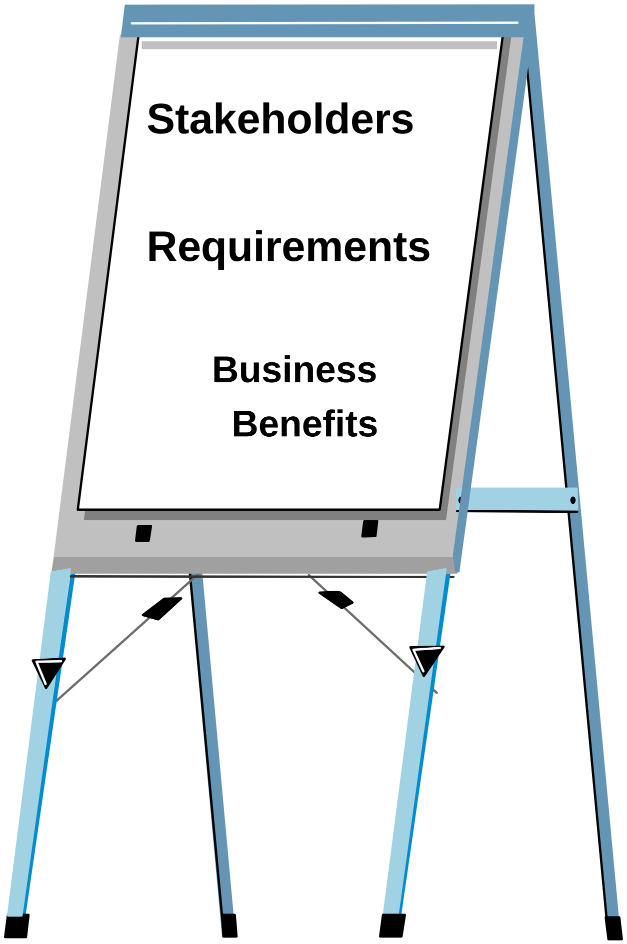
Debrief

- What happened?
- What did you learn?
- What can you apply in your job / project?



Feedback Reminder

Receiving Feedback

- Breathe
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Giving Feedback

- Give both the positive and "even better if"
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PM Feedback

After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback.   Document your lessons learned on page 26 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.

Reflections on Day 1

Purpose: Identify how you will use what you have learned on your projects

Process:

1. Reflect on the topics covered today and the notes that you made
2. Think about which project management processes will improve your projects and how to get your team involved in using them.

Participation: Individually

Product: At least one thing you will start doing and one thing you will stop doing on your project. Use page 28 in the Learning Log.

Start of Day 2

Did you know….

Adults forget up to 70% of learning if it is not recalled within a 24 hour period!

Start of Day 2 Recap

Purpose: To better remember topics covered yesterday

Process:

1. Review the topics covered yesterday.
2. On a flip chart, create the home page of a web site that covers yesterdays topics.

Participation: Teams

Product: One flip chart that looks like a project management web site home page

PMF Agenda

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Module 1 Getting Started and Defining the Project

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Module 2 Organizing the Team and Planning for Communication

Module 3 Stakeholders and Requirements

Day 2

AM

Module 4   Creating Hierarchical Decomposition Structures

Module 5   Risk Management

PM

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Module 7   Creating a Project Schedule

PMF Agenda

Day 3

AM

Module 8	Understanding Change Management
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PM	
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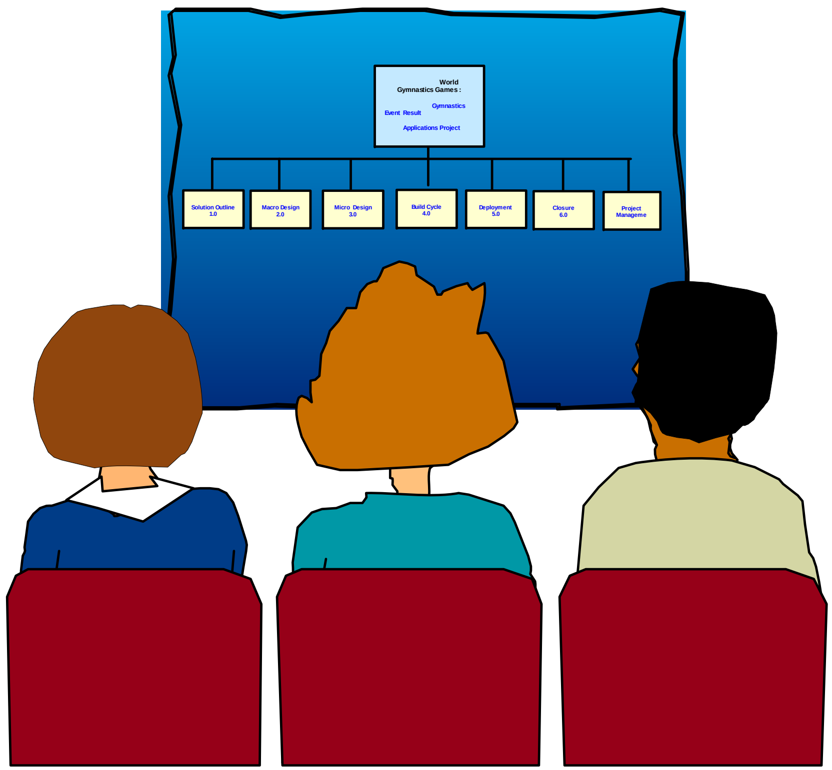
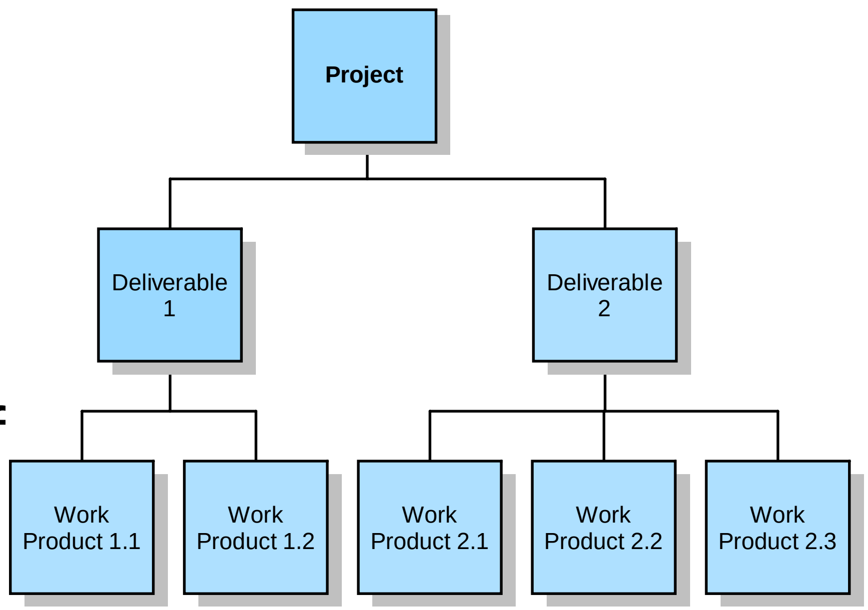
Creating Hierarchical Decomposition Structures

Module 4



Discussion

- What does decomposition mean?
- Why do we do it?
- What is the function of the PBS, WBS, and OBS?



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Creating Hierarchical Decomposition Structures

Purpose: Gain practical experience building a WBS

Process:

1. Read the Case Study 4-1 and review any previous documents
2. Identify all major product deliverables for your project.
3. Create a combined PBS / WBS for your project deliverables.
4. Review the PBS / WBS as a team to ensure its completeness.

Participation: Teams led by the Project Manager

Product: Completed PBS/WBS
Be prepared to present your PBS/WBS to the class.

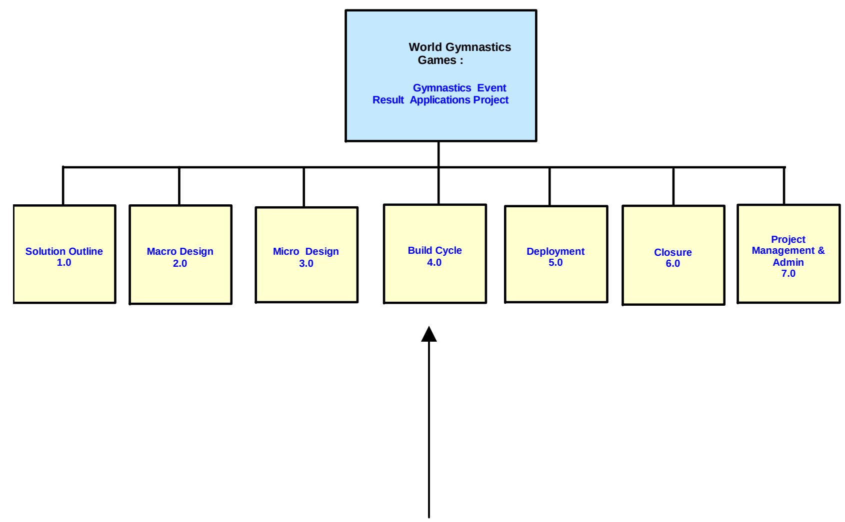
Activity Suggestions

Start with two blank easel pages taped together

Use table as working area so everyone can participate

Conventions:

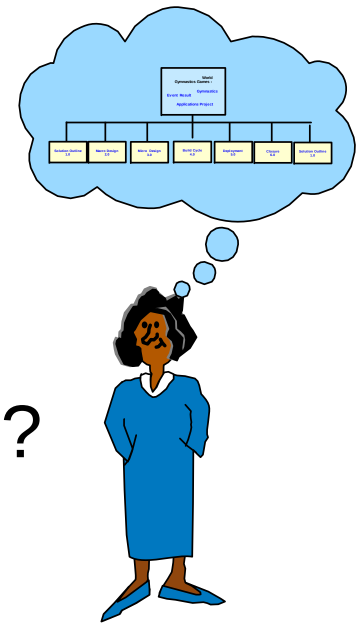
- WBS Name in every box
- WBS Number in every box
- Use "noun" and "verb" test to help with proper context
- Draw lines
- PM presents team process and high-level structure



Post on wall

Debrief

- On your projects, do you find a WBS helpful?
- Who usually creates the WBS?
- What happens when you do not spend enough time creating a complete WBS?
- Should you update your WBS when a change is accepted on the project?



Scope is realistic and managed

Healthy Signs

- Evidence of healthy negotiation
- Lengthy issues log
- Written agreements
- Scope documents are compiled and readily available

Unhealthy Signs

- "Issue" is a bad word
- Not clear what documents define scope
- Confusion over scope document versions and updates

1. Scope management plan is implemented.

2. Organizational, system, and geographic boundaries are appropriately defined.

3. Scope exclusions/assumptions are clear.

4. Proposed/agreed changes to terms are appropriately reflected in costs, schedules, and responsibilities.

Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.
- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for Scope, Stakeholders, Business Benefits, and Team

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

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PM Feedback

After the case study exercise:

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- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback. Document your lessons learned on page 34 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.

Module 5: Risk Management

Discussion

Definitions Recap

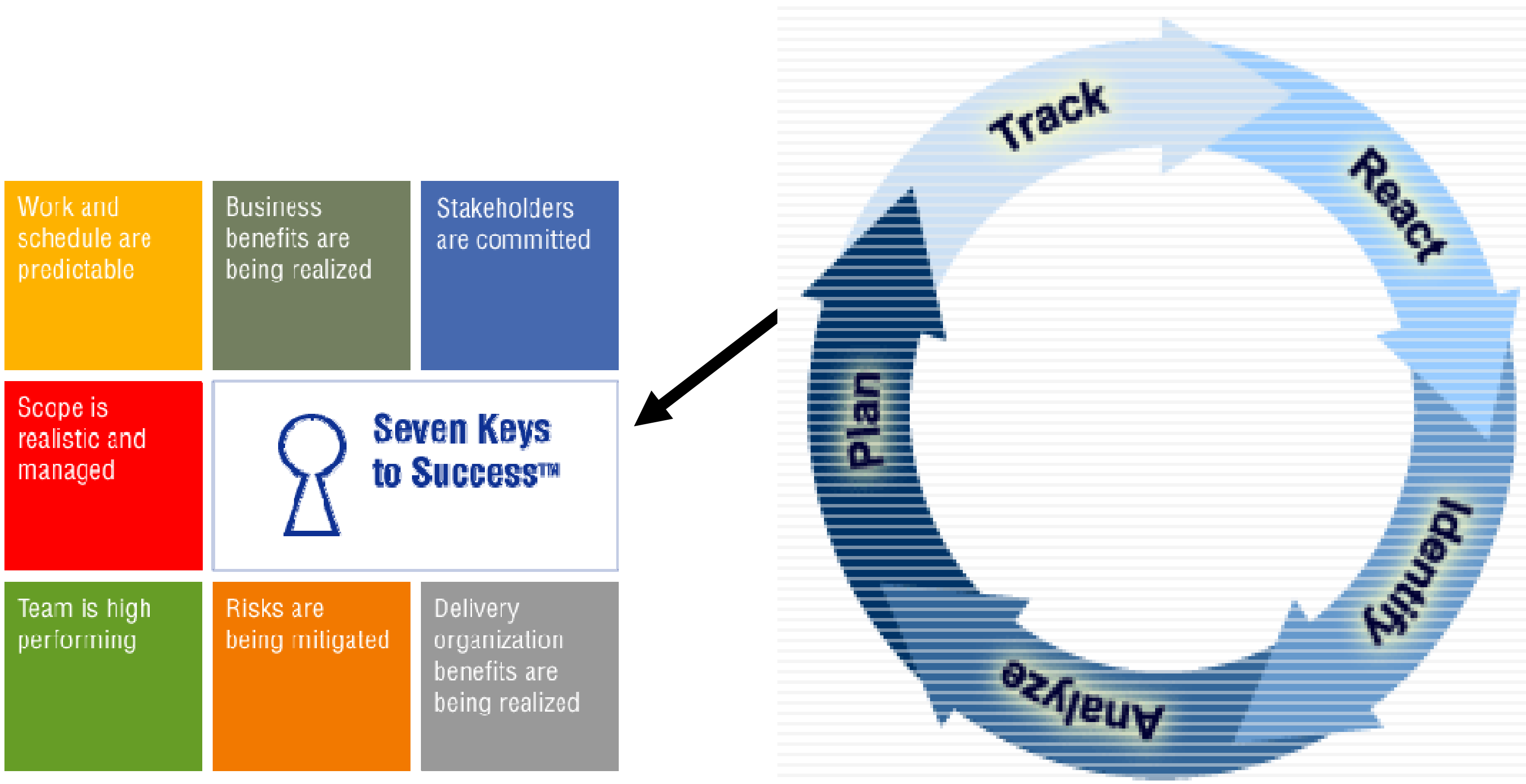
Definitions:

- **Risk** – A potential event or future situation that may adversely affect the project (proactive).
- **Issue** – An event that has occurred that can not be addressed by members of the project team. (reactive)
- **Problem** – A materialized risk or issue that can be addressed by members of the project team. (reactive).

Risk Responses:

- **Transfer risk.** Using a transfer strategy, you transfer all or a portion of a risk to another party.
- **Insurance.** When you have insurance coverage, you can use it to cover the cost of a risk event.
- **Contingency.** In this strategy, you set aside funds to be used when the risk occurs or when later containment is deemed to be appropriate.
- **Mitigate.** When mitigating risk, you take specific action to minimize or avoid the occurrence and effect of a risk.

Risk Management Process



Risk Management Tool

A brief introduction to the GS Risk tool….

Risk Rating Matrix

IMPACT			
High	Significant Risk	Major Risk	Maximum Risk
Medium	Minor Risk	Significant Risk	Major Risk
Low	Minor Risk	Minor Risk	Significant Risk
	Low	Medium	High

PROBABILITY

Create a Risk Management Plan

Purpose: To continue the risk management process by preparing a risk management plan

Process:

1. Read handouts and identify 4-5 risks.
2. Analyze probability and impact for each risk.
3. Use the risk matrix to identify the top 3 risks
4. Develop a Risk Response Plan for the top 3 risks
5. Add your Risk Actions (tasks) to your WBS using yellow "sticky note"

Participation: Teams led by Project Manager

Product: Completed Risk Template for top 3 risks
Be prepared to present using flipcharts and "sticky notes"

Risk Management Plan

Use the sample template for the Risks associated with your deliverables

WBS # or RIN #	Risk Name	Probability	Impact	Severity aka Exposure	Rank (sort)	Risk Response Plan
		H M or L	H M or L	H M or L	1	Task / Action

Identify risks – think of the 7 Keys

Analyze: Determine Probability, Impact and Severity for each risk, then Rank them.

After Ranking, develop an appropriate Task Action for the top 3 risks

Risks are Being Mitigated

Healthy Signs

- Documented plan
- Test-it-first tactics
- Regular and systematic probing for risks
- Risk and issue follow-up is taken seriously

Unhealthy Signs

- "What risks?"
- All-or-nothing tactics

1. **Risk management plan is fully implemented, maintained, and supported.**
2. **Risks are proactively sought in meetings and discussions and are dutifully identified, documented, and assigned for follow-up.**
3. **Risk tracking and reporting are timely.**
4. **Mitigations are effective.**

Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.
- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for Risk, Scope, Stakeholders, Business Benefits, and Team

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

- Red - Urgent - Corrective action required immediately.
- Yellow - Warning - corrective action required in the near term.
- Green - Stay the Course - no corrective action required.

Project Name: Interviewee: Date: Interviewer:

Key and Criteria	Noted Issues	Heads Up Display	Proposed Actions
Stakeholders are Committed	➢	Red Yellow Green	➢
Business Benefits are Being Realized	➢	Red Yellow Green	➢
Work and Schedule are Predictable	➢	Red Yellow Green	➢
Scope is Realistic and Managed	➢	Red Yellow Green	➢
Team is High Performing	➢	Red Yellow Green	➢
Risks are Being Mitigated	➢	Red Yellow Green	➢
Delivery Organization Benefits are Being Realized	➢	Red Yellow Green	➢

Debrief

PM Feedback

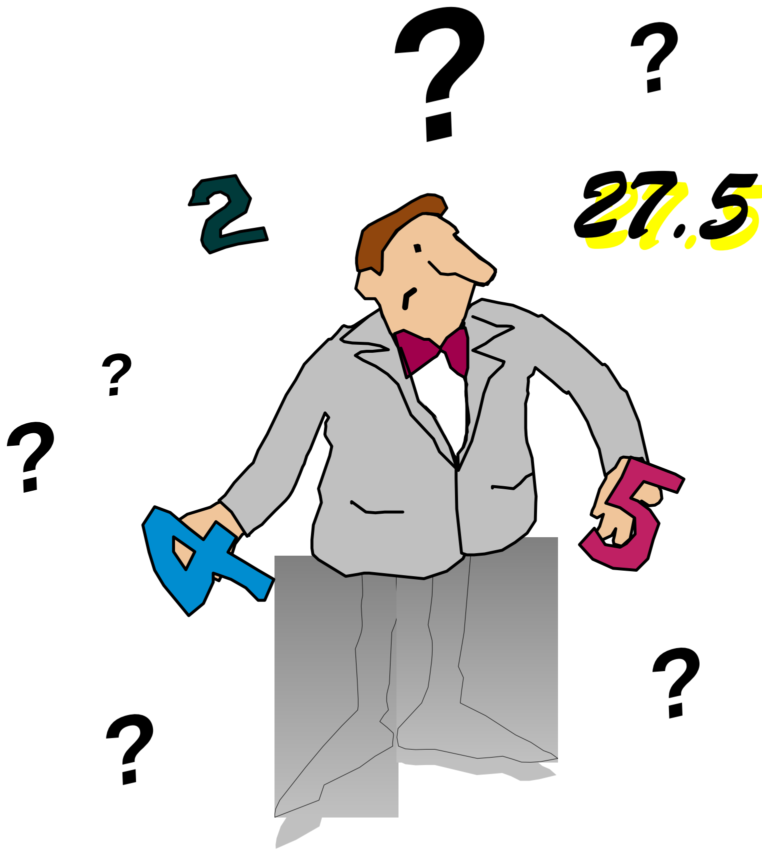
After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback.   Document your lesso
  38 of the Learning Log.
  - This should include any changes that you plan to ma
    work as a result of this exercise.

Estimating

Module 6



Discussion

Top-down Estimating

- Top-down estimating results in high-level estimates of projects or their summary tasks based on parametric, analogy or comparison, or expert judgment.
- Based on collecting judgments, past experiences, and on evaluating past data concerning similar activities.

Parametric Estimating

Uses specific measures to estimate the effort required to complete a task or to produce a work product, such as hours per lines of code and dollars per function point.

Advantages

– Can be more accurate and detailed than analogous

– Can be quicker than bottom-up

Disadvantages

– Accuracy varies widely

– Can be more costly to produce

– Historical information may not be available

– Parameters may not be quantifiable or scalable

Analogous Estimating

Use the actual cost of a previous, similar task, activity, or project as the basis for estimating the cost of the current task, activity, or project.

Advantages

- Little time and effort
- Less costly
- Details don't need to be known

Disadvantages

- Less accurate
- Historical information or expert opinion may not be available

Bottom-up Estimating

Cost and duration of individual work items in hours and summarized to a project total.

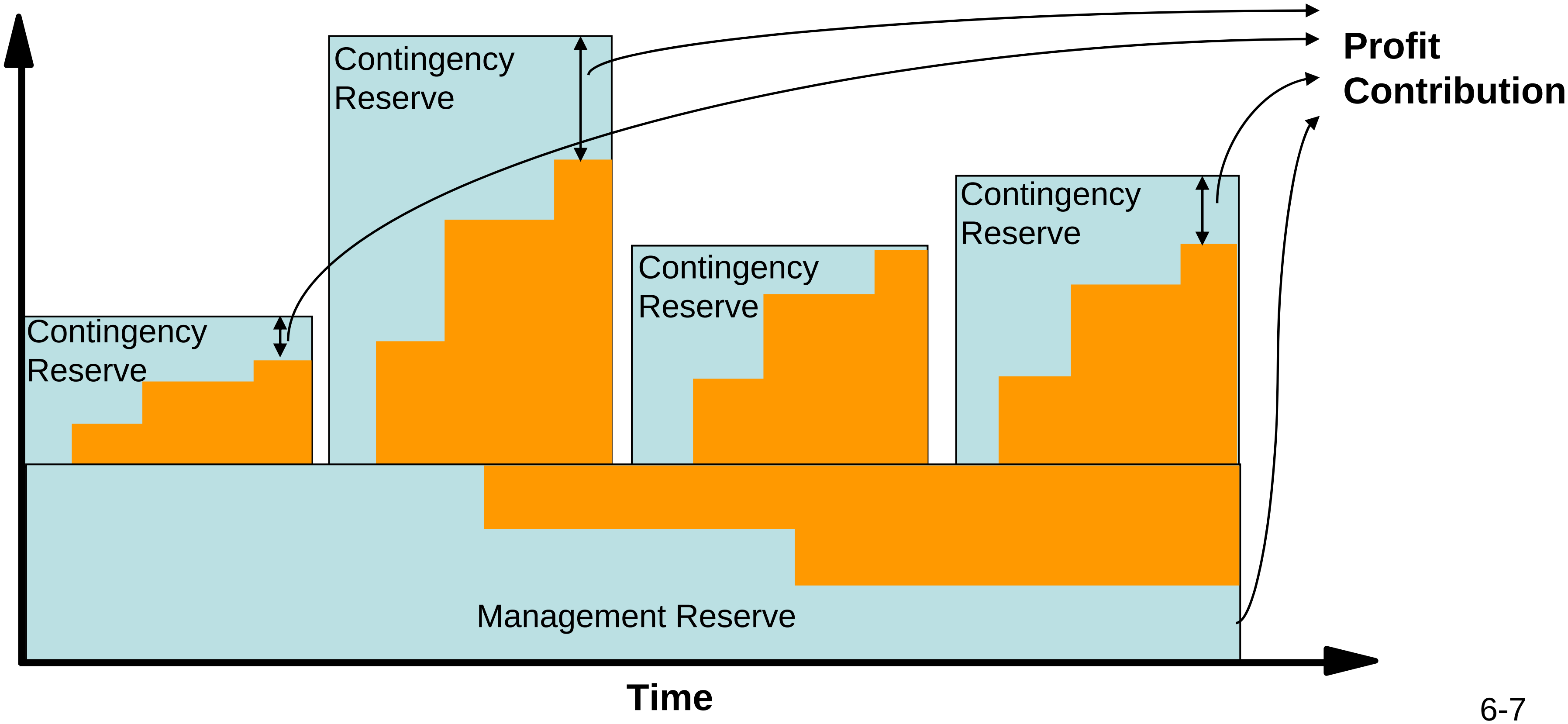
Advantages

- Improved accuracy
- Appropriate detail to monitor and control project
- Provide team buy-in to estimates

Disadvantages

- Longer time
- Higher cost
- Only as accurate as the WBS
- Team members may pad estimates

Contingency and Management Reserve

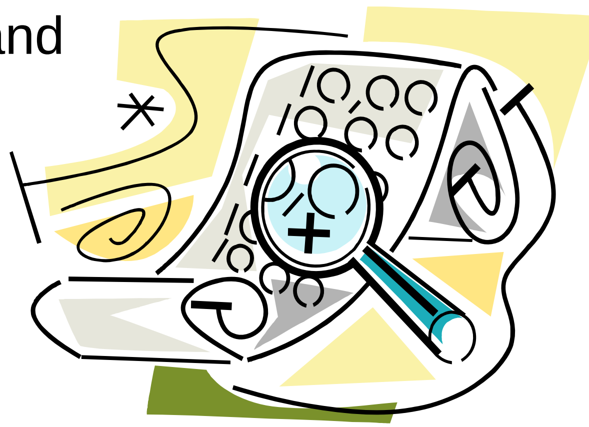


Create Case Study Estimates

Purpose: Practice creating cost estimates based upon your WBS and resources

Process:

1. Estimate the quantity and cost of equipment and other materials
2. Estimate human resource hours
3. Apply costs to the hours
4. Calculate the total cost



Participation: Teams led by Project Manager

Product: Completed cost estimate template
Be prepared to present your cost estimate

Debrief

- What are the difficult aspects of estimating?
- How do you overcome the difficulties?
- How do you validate your estimates?

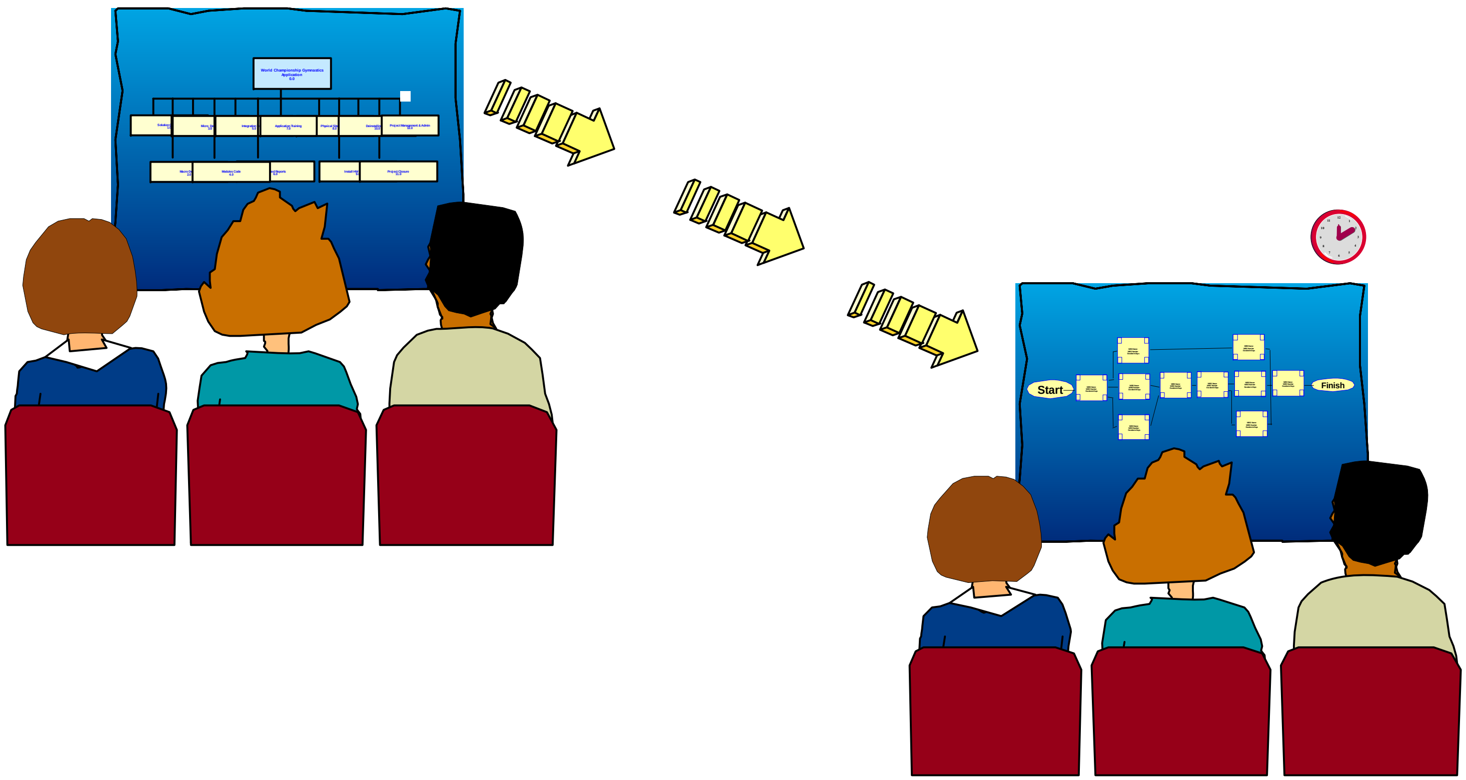
PM Feedback

After the case study exercise:

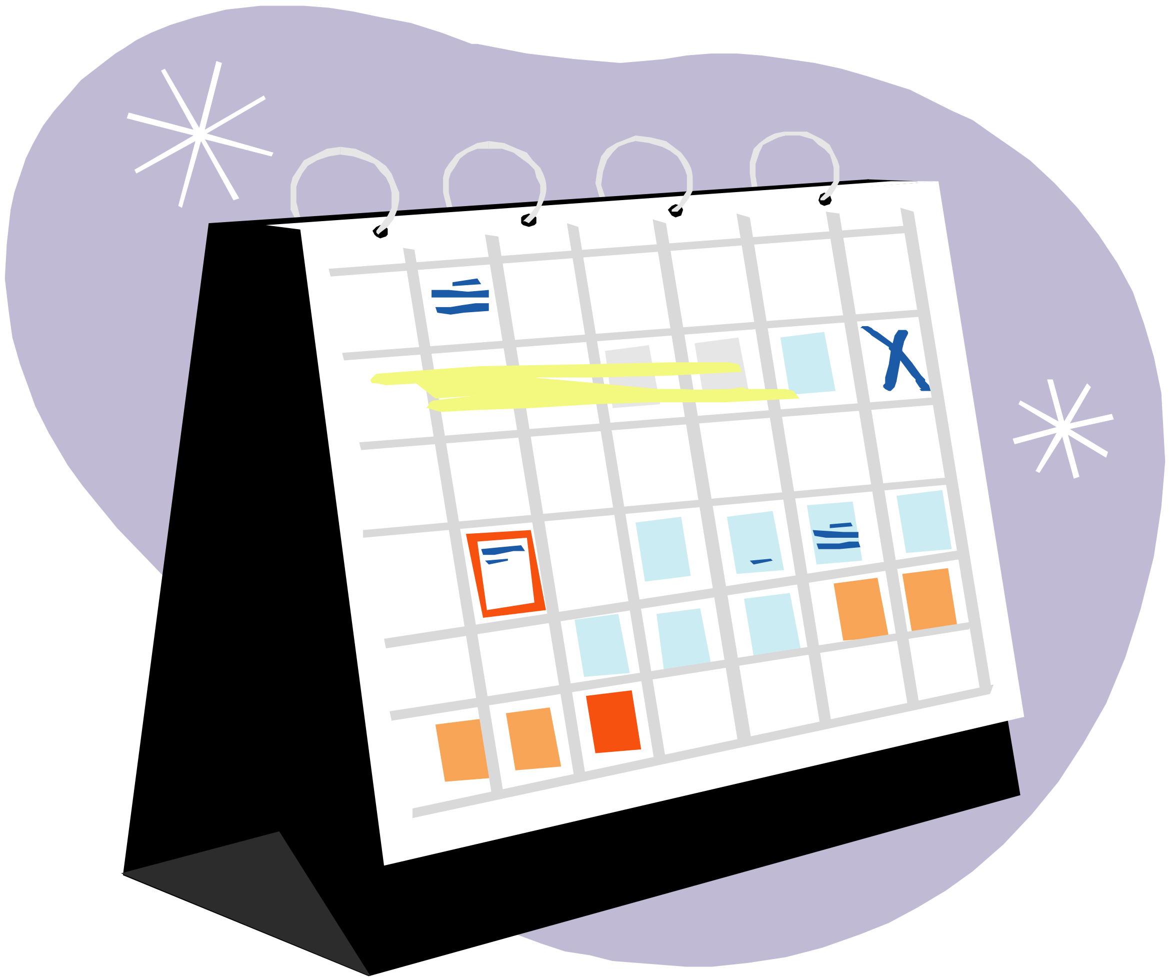
- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM
- After providing the PM feedback. Document your on page 44 of the Learning Log.
  - This should include any changes that you plan daily work as a result of this exercise.

Creating a Project Schedule

Module 7



Discussion

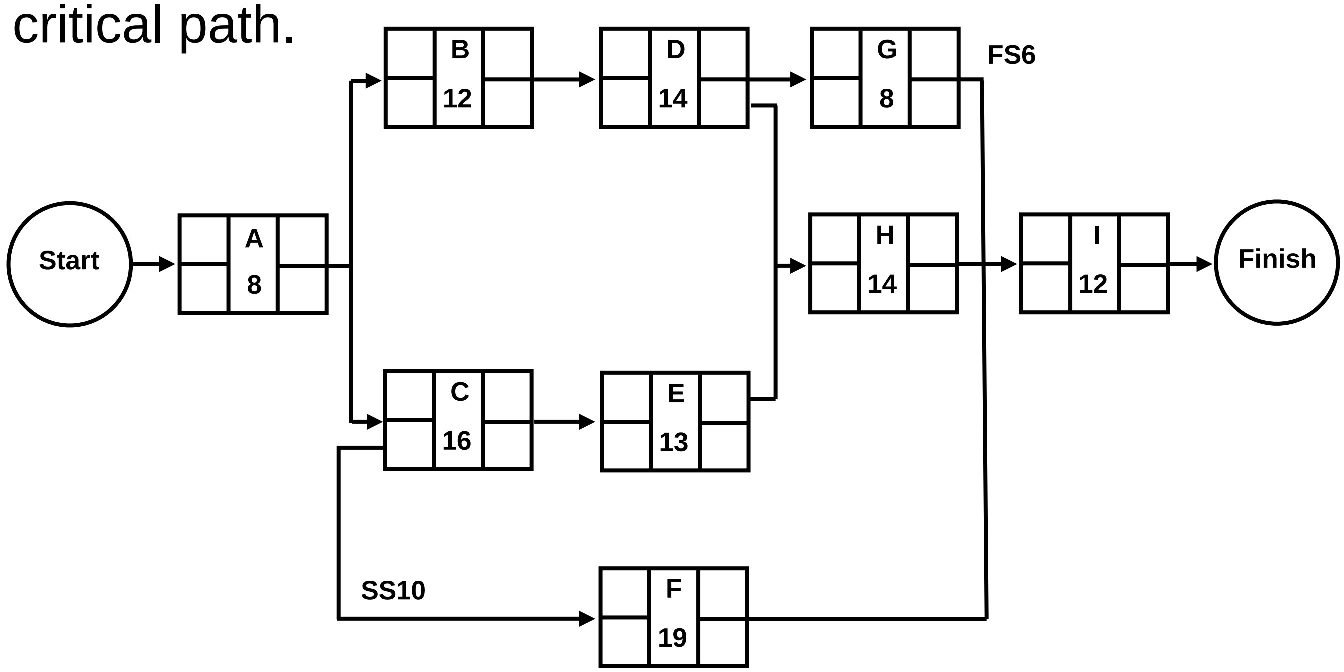


LL 45-49

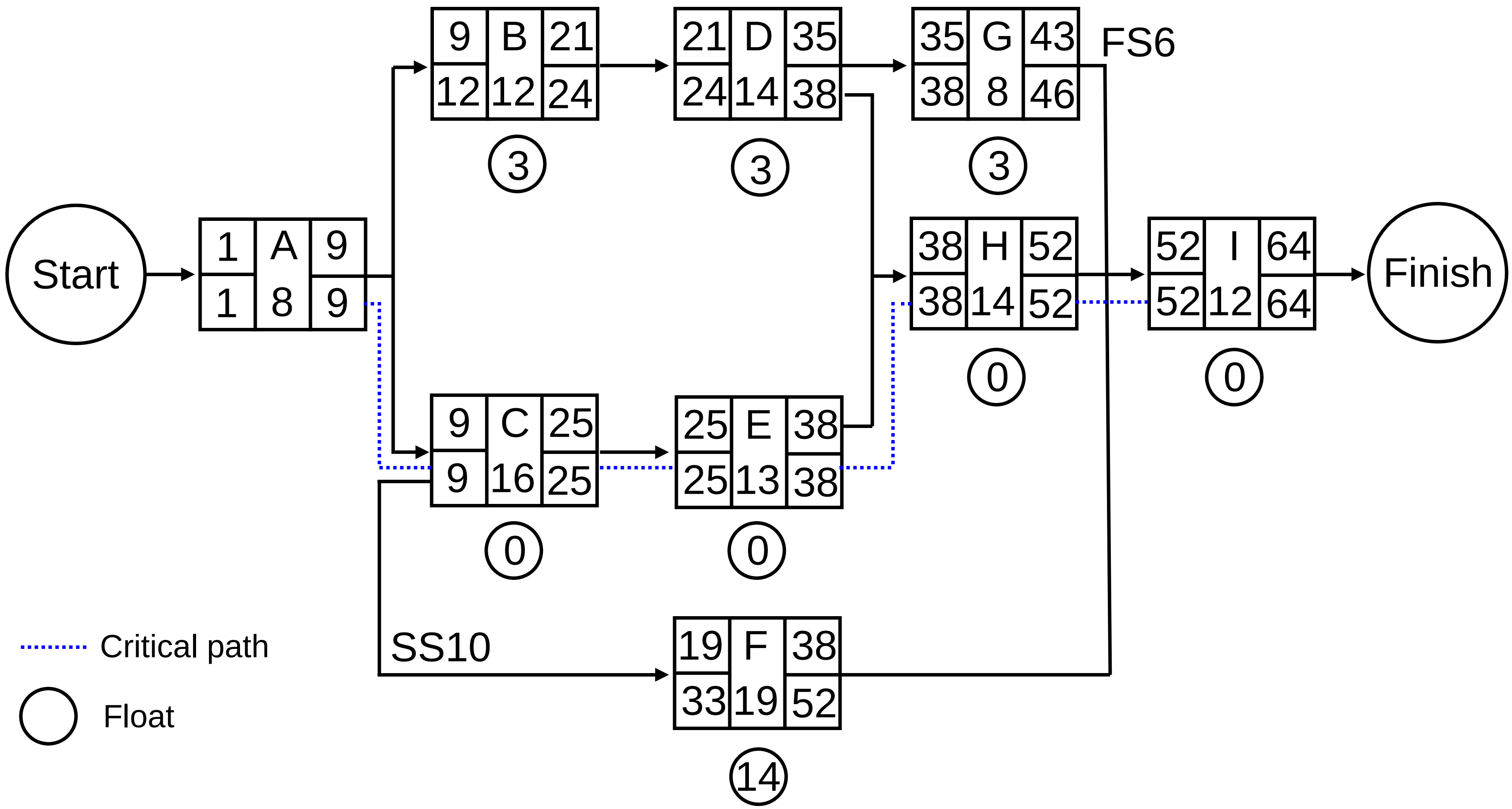
Critical Path Exercise

Work individually to complete this exercise:

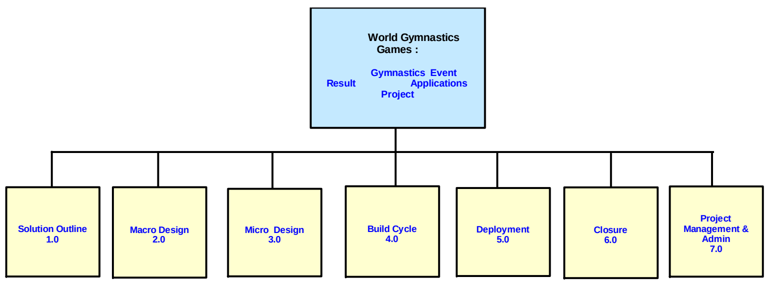
1. Calculate the forward and backward passes.
2. Calculate the float for each path.
3. Define the critical path.



Exercise Solution



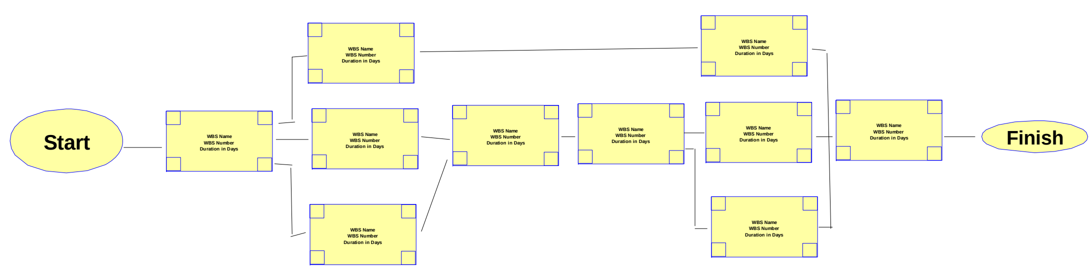
Scheduling Activity



Your assignment is to convert one of the "legs" of your combined PBS / WBS from this...

Remember.... only work packages (tasks) go into the network diagram. Once there, they are called "nodes"..

...into this



Scheduling Activity

Purpose: Practice developing a precedence diagram and identifying the critical path.

Process:

1. Using the work breakdown structure you defined earlier, develop a precedence diagram for the tasks in one “leg” of your WBS
2. Calculate the forward pass
3. Calculate the backward pass
4. identify float, critical path, and near-critical path
5. Identify new risks and update the risk plan

Participation: Team led by the Project Manager

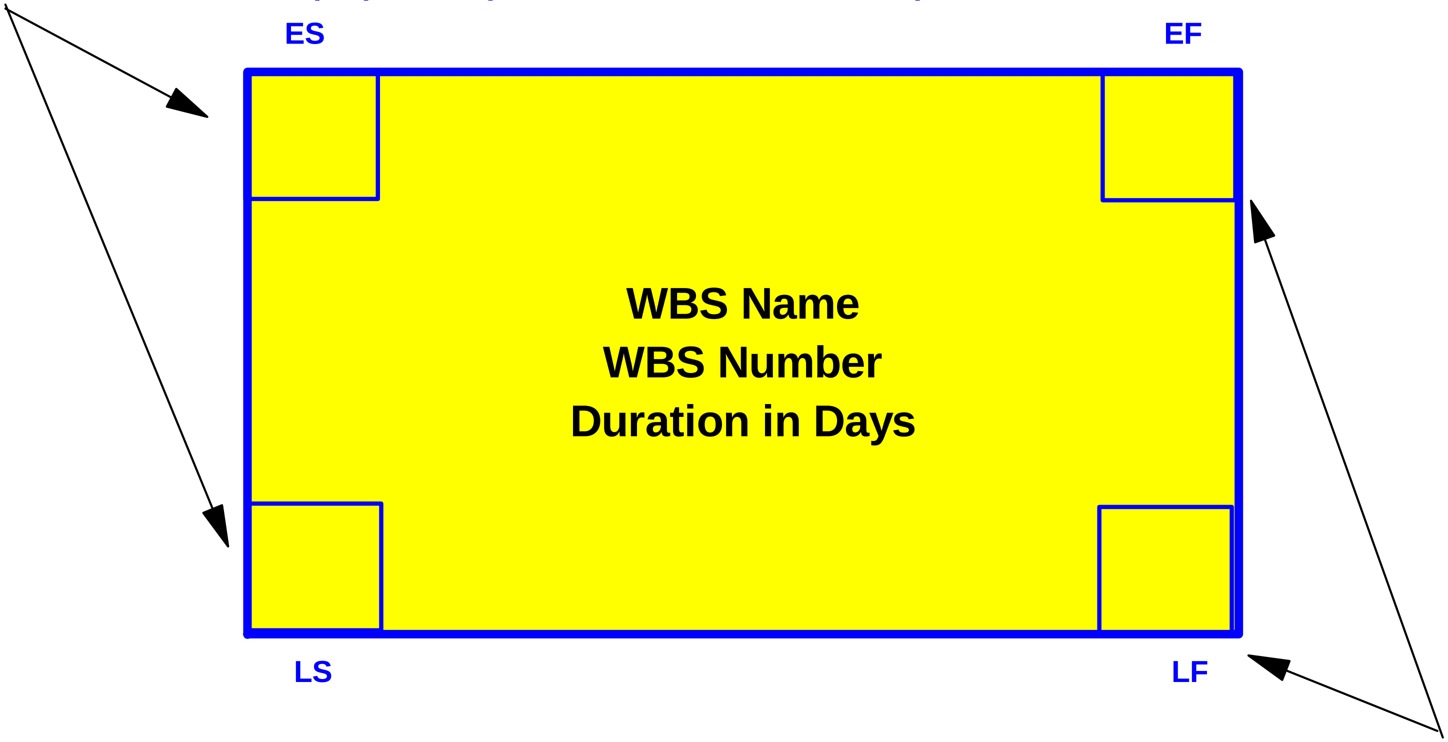
Product: Completed precedence diagram

Be prepared to present your answer to the class.

Conventions

Each Yellow Post-it (node) should contain:

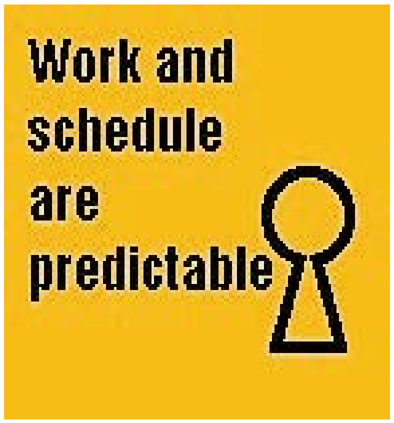
Draw boxes in each corner to prepare for your Forward and Backward passes



Draw boxes in each corner to prepare for your Forward and Backward passes

Debrief

Work and Schedule are Predictable



Healthy Signs

- Everyone gives the same definition of finished
- Good evidence of control
- Slippage, when it happens, is predicted

Unhealthy Signs

- Can't describe what finished means
- Uncontrolled — poor plans, controls, tracking mechanisms
- Slippage comes as a surprise

1. Project plan is accepted and maintained.

2. Interim and final milestone and deliverable acceptance criteria and roles are accepted.

3. Approach is appropriate, adequate, followed; resources have been scheduled.

4. There is confidence in progress report accuracy and estimates to complete.

Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.

- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for Work & Schedule, Risk, Scope, Stakeholders, Business Benefits, and Team

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

- Red - Urgent - Corrective action required immediately.
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Team is High Performing	➢	Red Yellow Green	➢
Risks are Being Mitigated	➢	Red Yellow Green	➢
Delivery Organization Benefits are Being Realized	➢	Red Yellow Green	➢

PM Feedback

After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback. Document your lessons learned on page 50 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.

End of Day 2 - Reflections

Purpose: Identify how you will use what you have learned on your projects

Process:

1. Reflect on the topics covered today.
2. Think about which project management processes will improve your projects and how to get your team involved in using them.

Participation: Individually

Product: At least one thing you will start doing and one thing you will stop doing on your project. Write down your ideas on page 66 of the Learning Log.

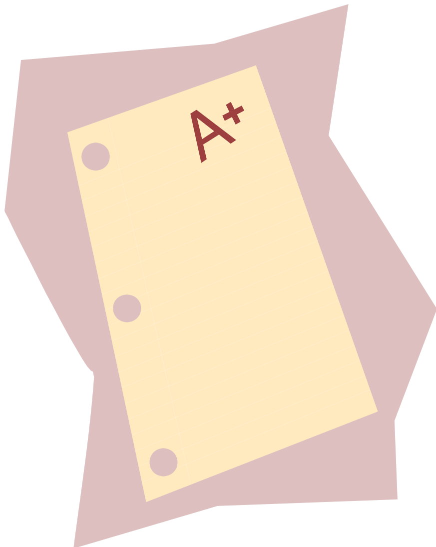
Start of Day 3

PM Strongest Link

Purpose: To better remember the learning from the previous two days.

Process:

- Create 5 questions you will ask another team – 15 minutes
- Conduct quiz show
- Award points for correct answers
- Deduct points for unreasonable questions



Participation: Teams

Product: List of 5 questions

PMF Agenda

Day 3

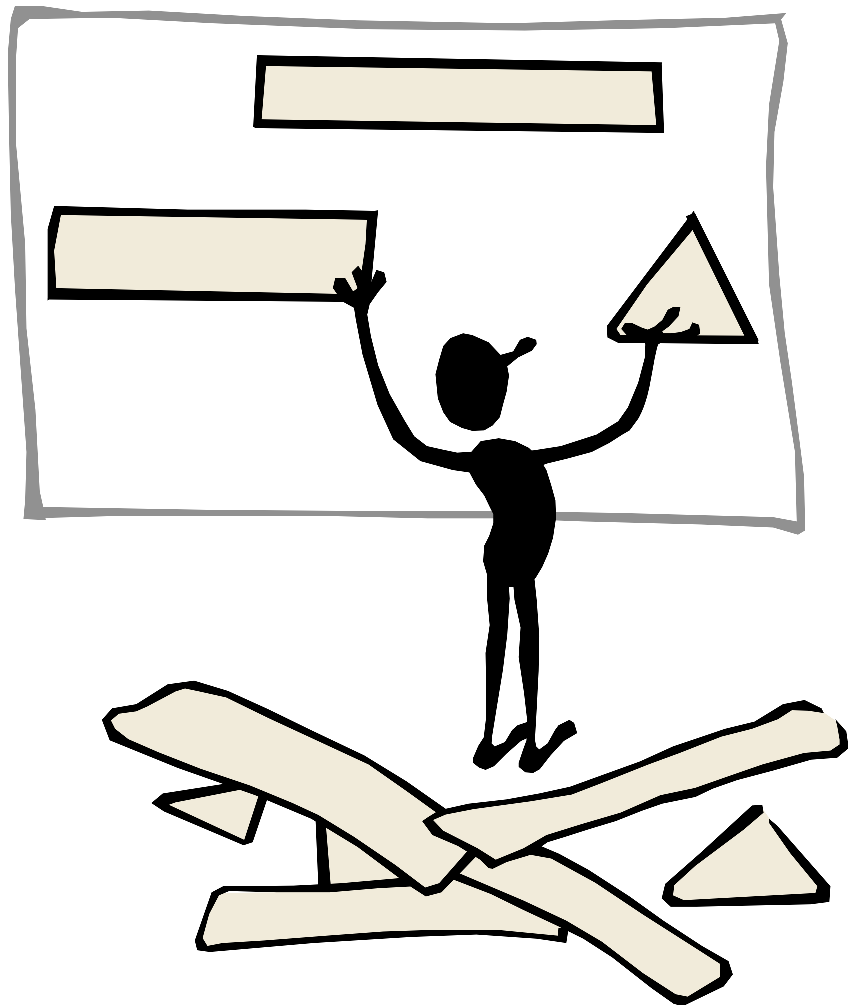
AM

Module 8	Understanding Change Management
Module 9	Executing and Controlling a Project
PM	
Module 9	Seven Keys Simulation
Module 10	Project Reviews and The 7 Keys
Module 11	Closing the Project
Module 12	Course Wrap-up and Exam

Change Management

Module 8

Discussion



LL 51-53

Change Request Activity

Purpose: Practice handling a change request

Process:

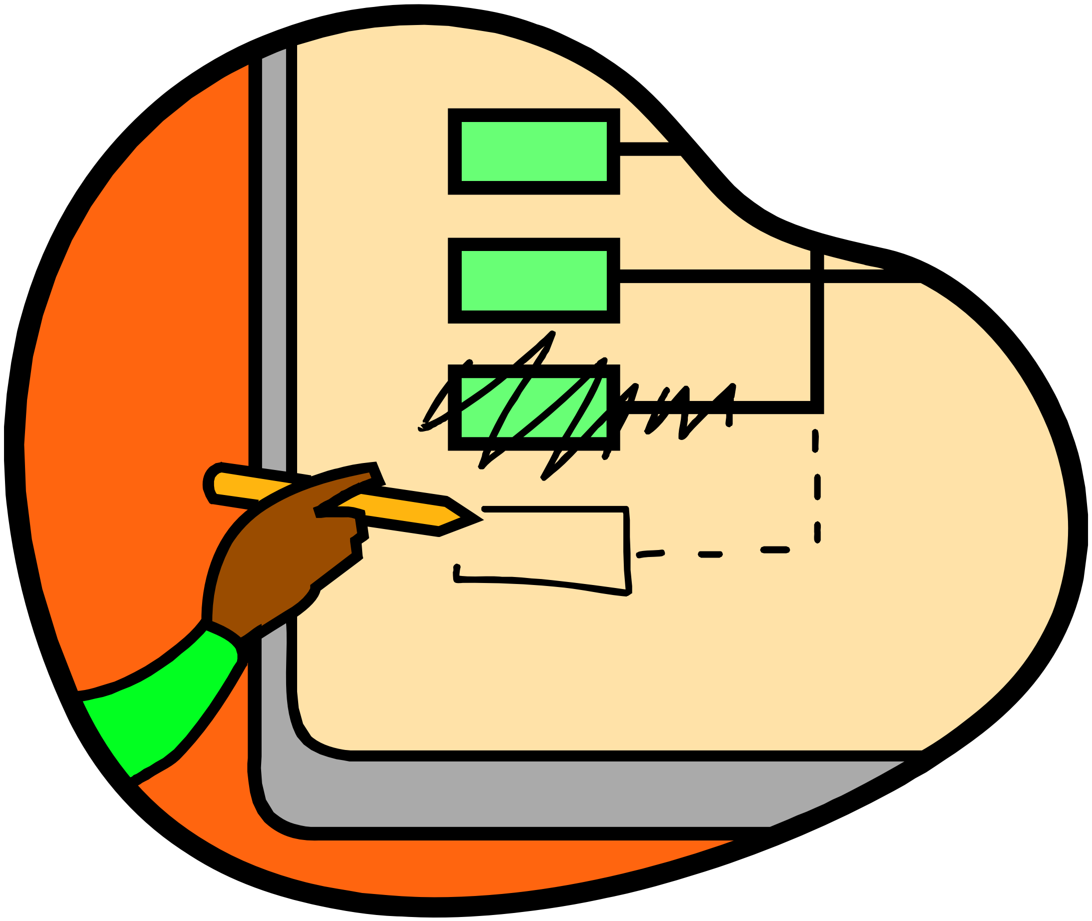
1. Read Change Request #97 from Perry Fields. The customer is requesting a change.
2. Identify the steps you would take to handle the change request

   Hint: The first step is logging the change in the change log.

Participation: Teams led by Project Manager

Product: Steps (flow chart) of how you handle the change request.

Debrief



Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.

- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for Work & Schedule, Risk, Scope, Stakeholders, Business Benefits, and Team

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

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Risks are Being Mitigated	➤	Red Yellow Green	➤
Delivery Organization Benefits are Being Realized	➤	Red Yellow Green	➤

PM Feedback

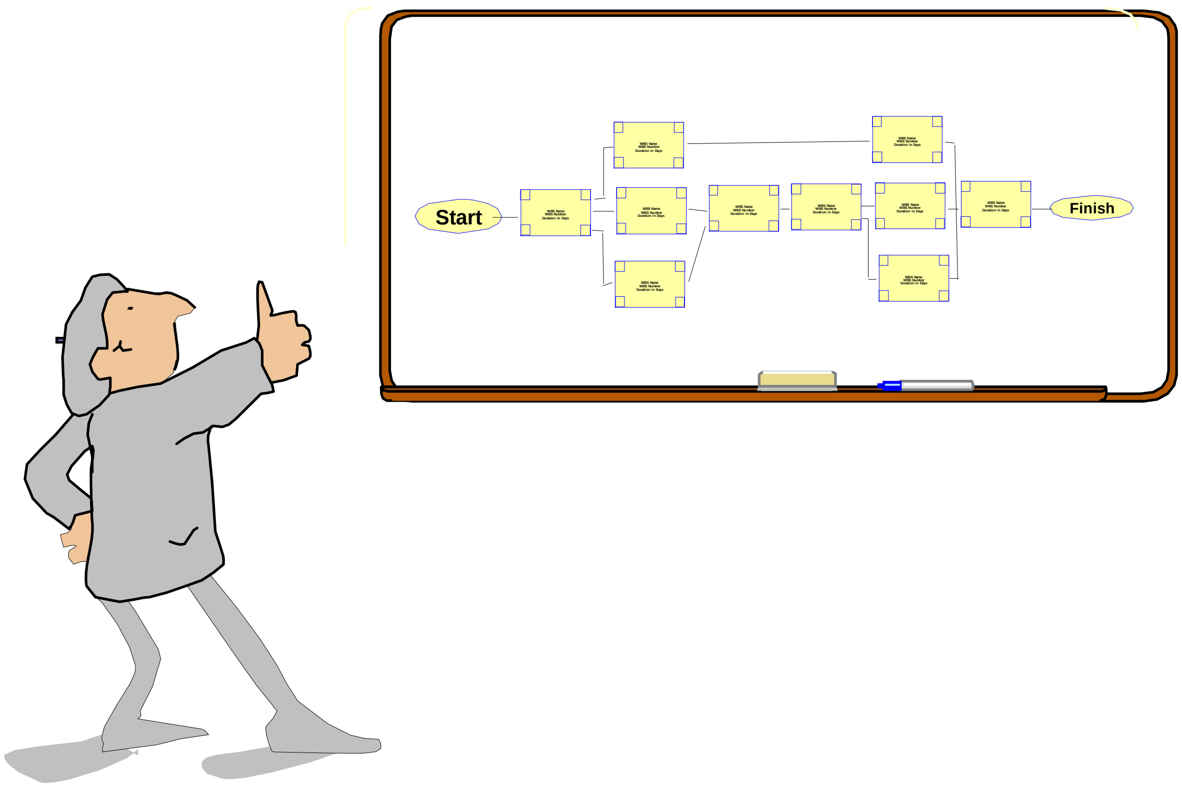
After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

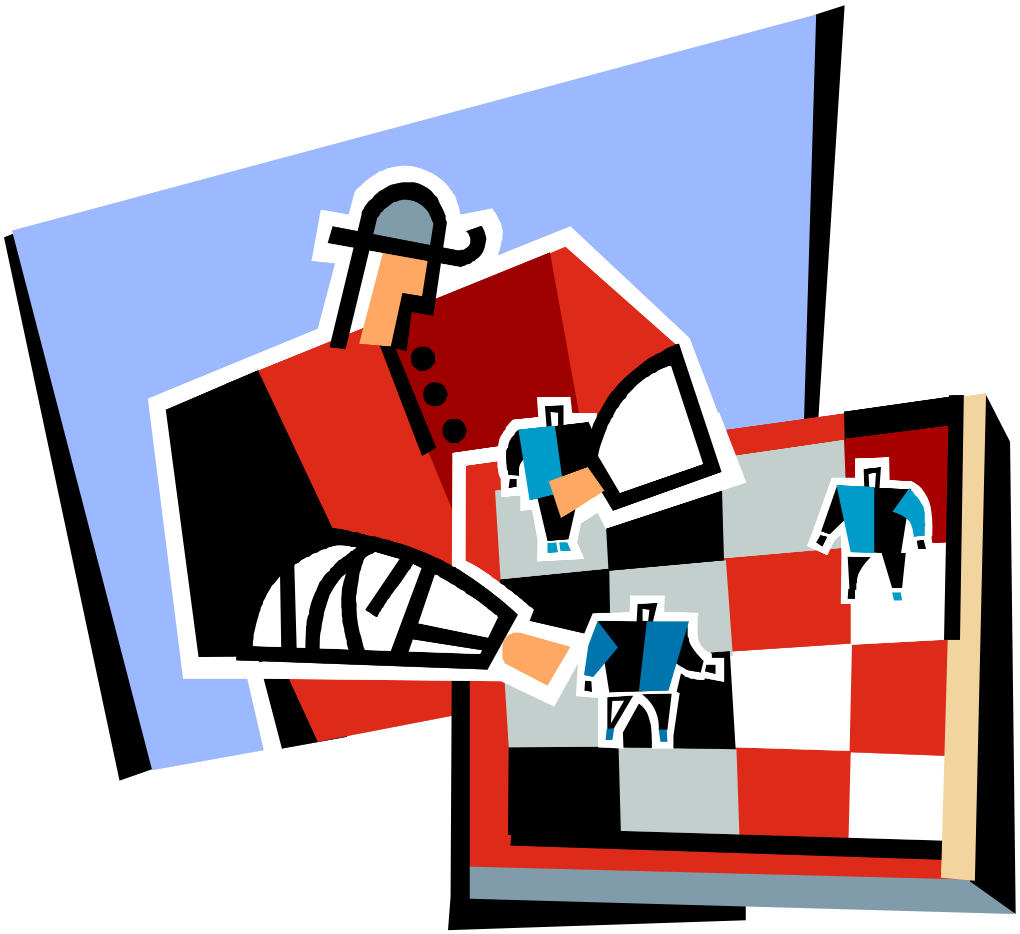
- After providing the PM feedback.   Document your lessons learned on page 54 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.

Executing and Controlling

Module 9



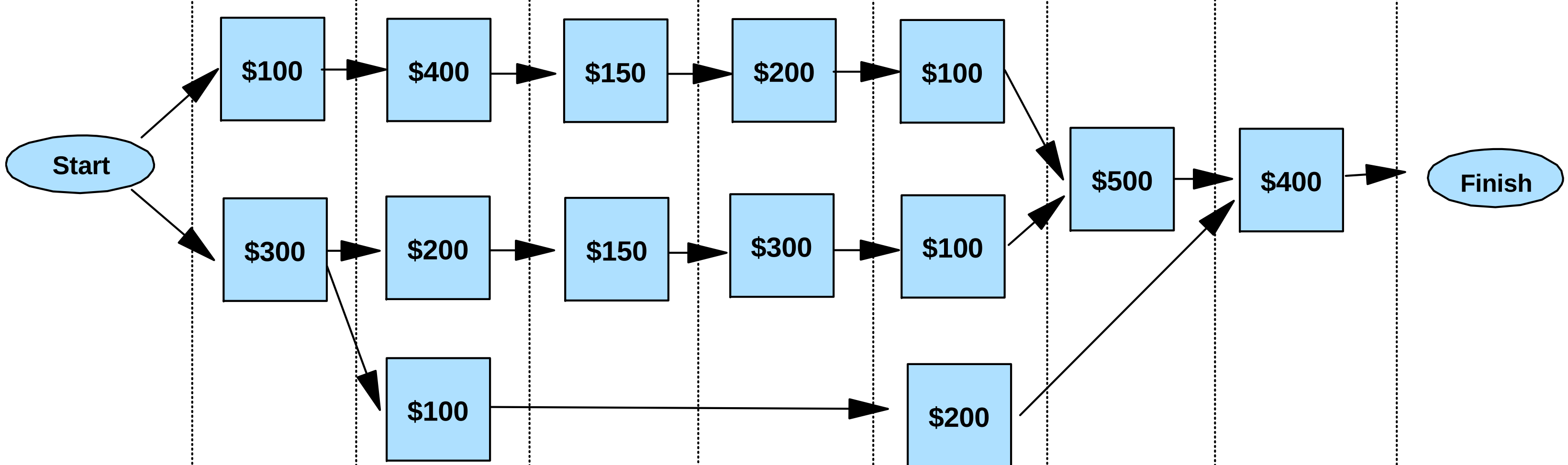
Discussion



LL 55-56

Reporting Earned Value

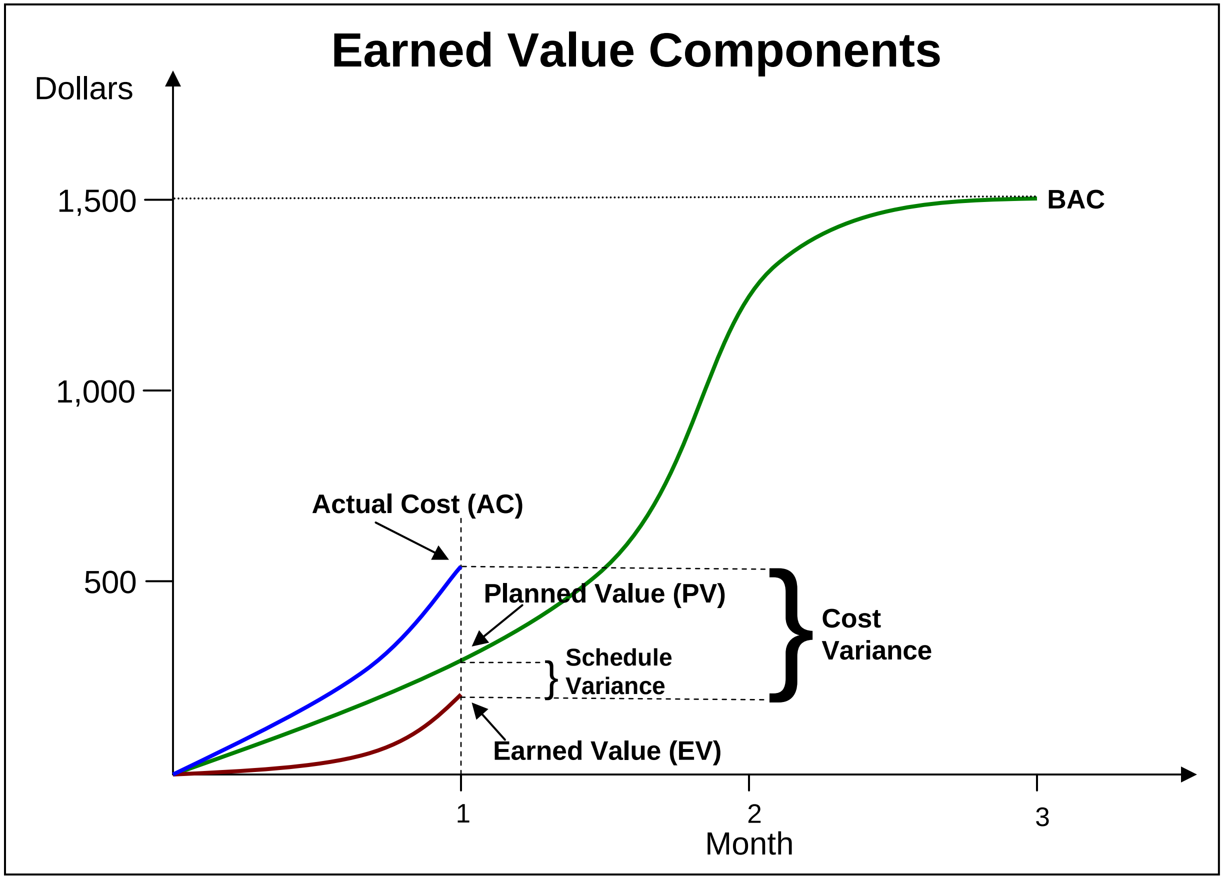
Network Diagram with Cost Estimates



	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	BAC
PV	$400	$700	$300	$500	$400	$500	$400	$3,200
AC	$400	$700						
EV	$350	$600						

EVM is a Point-in-time analysis

Earned Value Graphic



Earned Value Exercise

Purpose: Determine the status of a project by calculating earned value.

Process:

1. You have just received the latest earned value data from the project office. The office is expecting you to interpret this data.
2. To impress your boss, you plan to calculate:
   - CV
   - SV
   - Percentage spent
   - Percentage complete
   - EAC
3. Your boss expects a complete report in 10 minutes.

Participation: Individually

Product: Completed earned value computations.

Earned Value Exercise

Purpose: Determine the status of a project by calculating earned value.

Process:

1. You have just received the latest earned value data from the project office. The office is expecting you to interpret this data.
2. To impress your boss, you plan to calculate:
   - CV
   - SV
   - Percentage spent
   - Percentage complete
   - EAC
3. Your boss expects a complete report in 10 minutes.

Participation: Individually

Product: Completed earned value computations.

Delivery organization benefits are being realized

Healthy Signs

- People feel they are learning
- Willingness to invest in the project
- Good press is being created

Unhealthy Signs

- Good staff are not available
- Negative remarks about project

1. The project will help the delivery organization's reputation.

2. The project will help financially; billing and collections are current.

3. Project will help team members' careers.

4. Project will contribute to the organization's knowledge and lessons learned.

Delivery organization benefits are being realized

Healthy Signs

- People feel they are learning
- Willingness to invest in the project
- Good press is being created

Unhealthy Signs

- Good staff are not available
- Negative remarks about project

1. The project will help the delivery organization's reputation.

2. The project will help financially; billing and collections are current.

3. Project will help team members' careers.

4. Project will contribute to the organization's knowledge and lessons learned.

Seven Keys Assessment

Purpose: Practice reviewing the health of the project using the Seven Keys

Process: See the diagram.

- Record status
- Think about issues & actions

Participation: Teams led by Project Manager

Product: Status, issues, and actions for all Seven Keys

Time allowed 5 Minutes

Seven Keys Assessment Worksheet

- Red - Urgent - Corrective action required immediately.
- Yellow - Warning - corrective action required in the near term.
- Green - Stay the Course - no corrective action required.

Project Name: Interviewee: Date: Interviewer:

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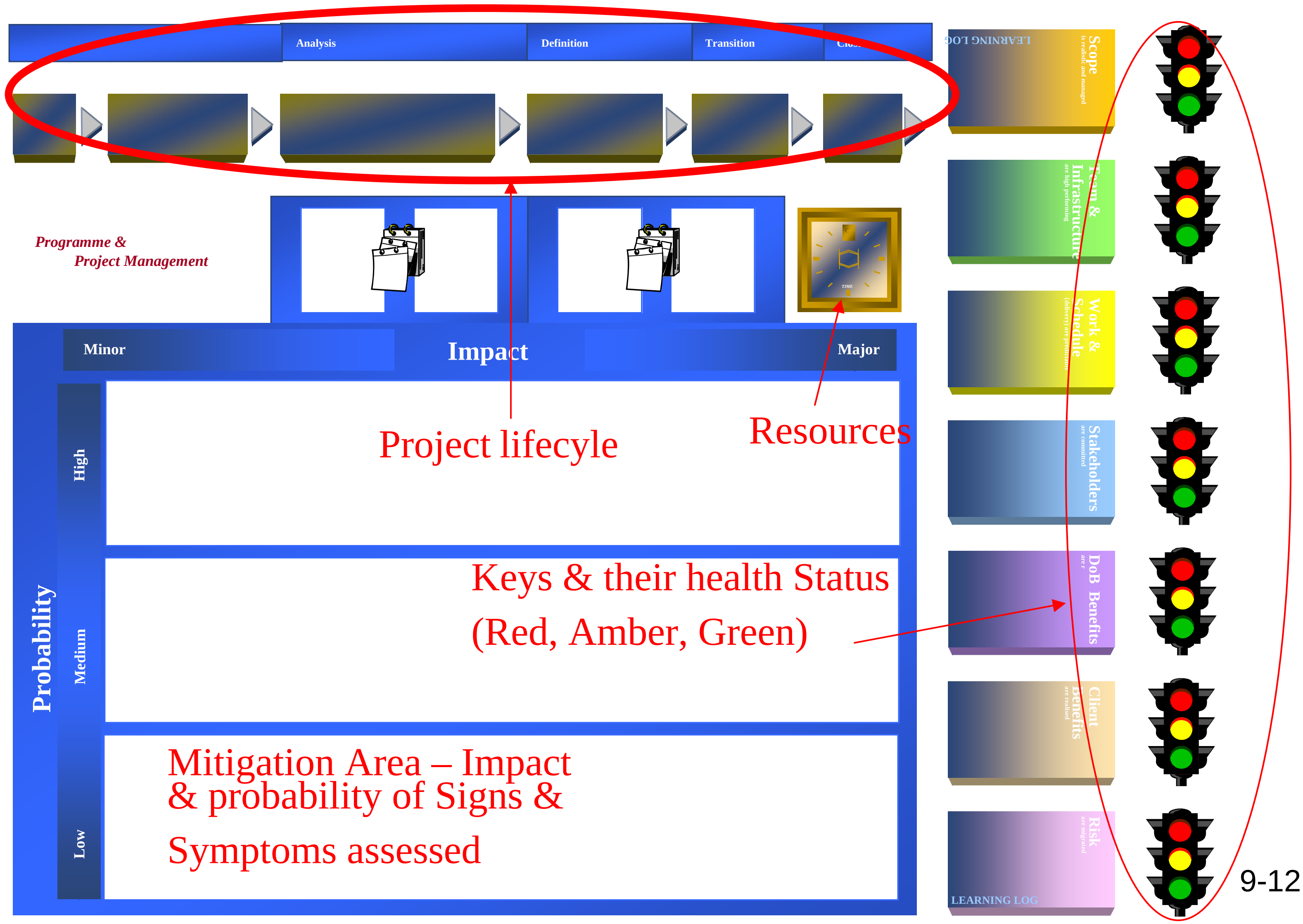
Delivery Organization Benefits are Being Realized	➢	Red Yellow Green	➢

Seven Keys to Success™ Simulation

LL13-17

Seven Keys to Success™ Simulation

What’s on the Board?



Set-up

Key	Start	Demo	Round 1	Round 2
Stakeholders	6			
Bus.Benefits	7			
W&S	7			
Team	4			
Scope	4			
Risks	5			
DOB	6			

Demonstration Round

Purpose: Understand the mechanics and rules of the simulation.

Process: Follow the instructions given to you by the trainer. Ask questions about the set up to clarify understanding.

Participation: In Teams

Product : Updated Heads Up Display

Round 1

Purpose: Use the Seven keys to manage a project based on a simulated IBM project environment,

Process:

1. Take out 9 resource tokens
2. Review the cards for Round 1
3. Discuss the impact and probability of each
4. Allocate the Project Management resources to the most important cards
5. Update Seven Keys status for each key based on your decision

Participation: In Teams

Product : Allocation of project management resources and updated status recorded on the Heads Up Display

Round 2

Purpose: Use the Seven keys to manage a project based on a simulated IBM project environment,

Process: Time allowed 15 minutes

1. Take out 11 resource tokens
2. Review the cards for Round 2
3. Discuss the impact and probability of each
4. Allocate the Project Management resources to the most important cards
5. Update Seven Keys status for each key based on your decision

Participation: In Teams

Product : Allocation of project management resources and updated status recorded on the Heads Up Display

Seven Keys Uses

- As a common language for communication and reporting with the project team, sponsors, and stakeholders
- To set Steering Group agendas for effective project governance
- A structure for Quality / Risk Reviews
- To identify underlying causes of project health
- To identify and prioritize actions required
- As a checklist for decision making; for example, changes in scope

Effective at all stages, from Opportunity, through Design and Delivery, to Close

LL 13-17

The Seven Keys Report (Heads-Up Display, "HuD"):

The Seven Keys	Issues	HuD	Corrective Actions
Stakeholders are committed			
Business Benefits are being realized			
Work and Schedule are predictable			
Scope is realistic and managed			
Team is high performing			
Risks are being mitigated			
Delivery organization benefits are realized			

Tips on Using the Seven Keys

- If you use all Seven Keys, you will be able to identify any and every issue affecting project health
- Even good projects are not green on all keys all the time, but good projects are <u>always</u> assertive and quick to identify and address issues and <u>always</u> take timely corrective action
- On the other hand, poor projects generally have one or more keys go "red" early, and they stay red until the project fails…
- Don’t over engineer the Seven Keys, they are a simple communication tool that provides a highly effective view of critical project dimensions
- Take your Seven Keys assessment seriously – don’t just ‘tick the boxes’

Project Review

Module 10

Discussion

LL 59-60

QA Process

Signature Selling Method	Customer Relationship Management	WW Quality Assurance Process
Qualify the Opportunity	Opportunity Management	Pre-Bid Consulting
Develop Solution with the Customer	Design the Solution and Create the Proposal	Technical and Delivery Assessment Proposal Baseline Assessment
Close the Sale		Contract Baseline Review
Monitor Implementation and ensure Expectations are met	Deliver the Solution	Project Management Review(s)

Why do Project Management Reviews?

- **Problem Prevention:**
  - **Improve** the quality of projects
    - Detect problems early
    - Help Project Managers develop corrective actions
- **Proactive Troubled Project Remediation:**
  - **Decrease** the number of Troubled Projects
    - Provide sound recommendations and assistance to the PE's / PM's in developing viable recovery plans
    - Follow-up on agreed recovery actions
  - **Assess** and report impact to services business
  - **Identify** root causes and help develop corrective actions
  - **Improve** customer satisfaction
- **Continuous Process Improvement**
  - The PMR goals go beyond identifying & resolving the issues that are impacting a single engagement. The results of each PMR contribute to the improvement of our entire services business portfolio.

What do QA Reviewers Look For?

- Customer relationship: expectations, satisfaction, communications, commitments
- Project management: roles and responsibilities, resources and skills, project management processes, project plans, subcontractor management, problem management and resolution, schedule management
- Change and scope management including Request for Services (RFS) process
- Financial management and status
- Procedures for communication and reporting (internal and external) and their effectiveness

What do QA Reviewers Look For?

- Risk management and current risk assessment
- Delivery execution: transition and transformation management, issue management and escalation, deliverable management
- Technical solution: solution baseline, functional requirements, scope creep
- Level of IBM management support and commitment

How to Prepare for your PMR

- **Be Proactive!**
  - Scheduling the review well beforehand and include the PMR activities in your project schedule
  - Do not try to reschedule it unless you have a ***very*** good reason, it indicates your project may be out of control
  - Consider it an opportunity to escalate senior management if you need to

- **Do a self assessment using GSRisk and PMR Health prior to the review:**
  - Identify the unique risks and containment strategies
  - Share the results with the QA Reviewer
  - Note that only 1 High Risk finding can down-grade the rating
  - Customer and Financial issues can force a C or D rating

How to Prepare for your PMR

- **Schedule all personnel required for the interviews**
  - Selected IBM personnel (PM, PjTL, Test Mgr etc.)
  - Key subcontractors,
  - Key customer project members
  - Customer PM and Executive sponsor & other stakeholders (do these last)

- **Schedule an hour for interviews and ensure a reasonable break between each interview e.g. 30mins**

- **Make all the arrangements for room bookings etc.**
  - Have a dedicated room with phone & network connection for the duration of the review
  - Make sure rooms are secure and allow confidential discussions.

How to Prepare for your PMR

- **Ensure documentation is up to date and filed in your PCB**
  - Ensure that all required documentation as requested, including the Project Plan, is current and ready for review
  - Send the requested documentation to the reviewer as early as possible

- **Action Prior QA recommendations & actions**
  - Demonstrate that you are implementing the required changes (if any)

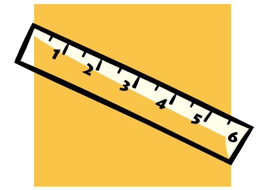
How to Prepare for your PMR

- **Prepare a kick off presentation:**
  - Overview of scope & solution
  - Contract summary : unique T&C's, responsibilities etc.
  - Team composition : IBM, Subcontractors & Customer
  - Governance structure
  - CR/RFS Status
  - Customer Satisfaction/Issues Status
  - Key Issues & Risks and their containment actions
  - Action plan status from previous PMR and unresolved items (if any)
  - Project Status:
    - Financial Position : Earned Value, budget, expenses, profit
    - Schedule : SoW v Work Plan (non-OIS), Transition/BAU (OIS)
    - SLA performance

What Happens after the PMR?

- **Review the findings with the QA Reviewer & correct errors of fact**
- **Develop an action plan with the QA Reviewer**
- **Incorporate your Actions into your overall project plan**
- **Action QA recommendations:**
  - Issues/Findings raised during PMR's need to have appropriate Action plan created and should be tracked and managed to completion.
  - High Impact findings need to resolved before future Program/Project reviews are conducted.
- **Focus on good project management discipline:**
  - Scope, Planning/schedule, Budget/cost
  - Underpinned by Risk, Change, Communications, Quality & Resource Mgt
  - Focus also on what is urgent/important/essential

Case Study Review



Purpose: Practice conducting a project health review

Process:

1. Read the Project Review Document and the Seven Keys Assessment
2. Reviewers – add any additional questions that should be asked
3. Reviewees – collect your project documentation
4. The reviewers interview the PM and project staff to assess the health of each key
5. Create Summary Assessment with Status, Issues and Proposed Actions

Participation: Designated teams act as reviewers, led by Project Manager
Other teams are being reviewed, led by Project Manager

Product: Completed Project Review Document
Flip chart with Status, Issues and Proposed Actions.

Debrief

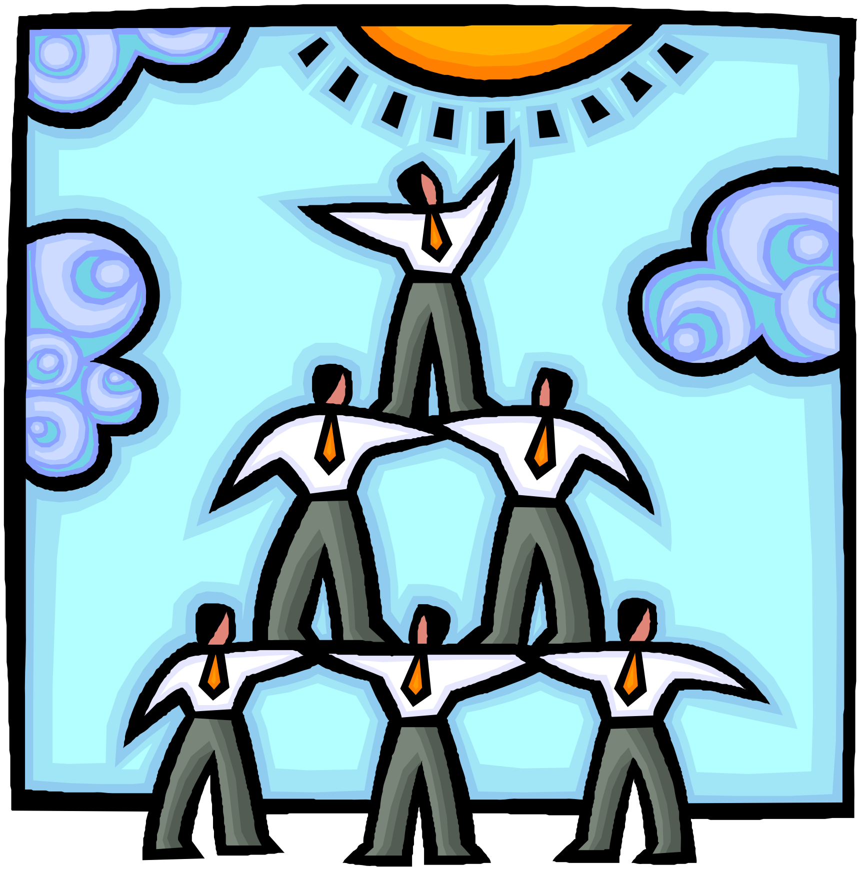
PM Feedback

After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

Closing the Project

Module 11



Discussion

LL 63

PM’s Responsibilities

Assess the terms of agreement and the completion of all commitments.

- Review the terms of the project plan and the sponsor agreement and verify the completeness of all deliverables and the currency of all documentation.
- Verify that all supplier agreements have been fulfilled and closed.
- Verify the satisfaction of post-delivery commitments, such as readiness to fulfill warranty and support obligations.

Release the technical environment.

- Identify and release technical environment elements, such as office space, computer installations, and related software.
- Equipment or space needed for warranty support can be left in place after the project closes

PM’s Responsibilities

Obtain sponsor feedback.

Obtain information about the sponsor's areas of satisfaction and dissatisfaction, then document this information and use it as input to the lessons learned.

Assess the lessons learned.

Determine the key lessons learned on the project, document them, and suggest improvements for future projects in the project evaluation report.

Close out the sponsor agreement.

Perform the administrative closure of the sponsor agreement. This includes generating, gathering, and disseminating information to formalize project completion and closure.

Submit the intellectual capital.

Submit all intellectual capital generated on the project, including lessons learned, the WBS, project definition reports, and any other related documentation to the ICM AssetWeb. Current and future projects will benefit from your experienc

PM's Responsibilities

Final Project Meetings and Reviews

Project review. Conduct a project review with the sponsor shortly before the project ends to ensure that:

- All contractual obligations have been met by the supplier to IBM and by IBM to the project sponsor
- The project sponsor formally accepts the project as being complete
- All assets on loan to the supplier or the sponsor have been returned
- Everything is ready and in place to close the project

Lessons learned meetings. To identify key lessons on the project, conduct lessons learned meetings with the internal team, the sponsor, and your suppliers. How to conduct lessons learned meetings is discussed in "12.3 Lessons Learned."

Final internal review. After the project is closed, conduct a final internal review of the project to identify and submit any intellectual capital developed on the project