

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.



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Module 1 - Welcome to *Project Management Fundamentals*

Module 1 Timing

This module lasts for 3 hours and 30 minutes, 08:30 – 12:00, on day 1.

Start	End	Length	Subject
08:30	09:45	75	Getting Started
09:45	10:00	15	Break (Instructor sets up Bridge Game)
10:00	11:15	75	Bridge Game with presentation of results
11:15	12:00	45	Bridge Game debrief and course administration
12:00	01:00	60	Lunch

Objective of This Module

Welcome students, practice project management skills and behaviors, and discuss administrative information and course requirements.

Summary of Documents to Hand Out - for the Bridge Game

1. Handout 1-1 Project Manager Instructions
2. Handout 1-2 Official Bid
3. Handout 1-3 (after the bridge is completed, prior to the team debrief)

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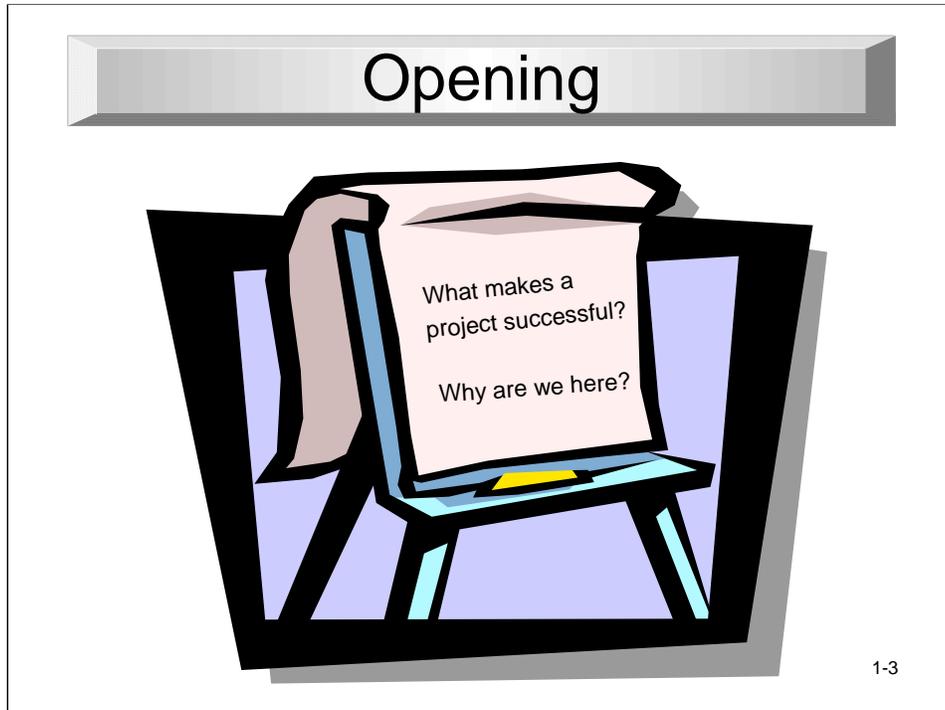
1-2

Module 1 - Welcome to *Project Management Fundamentals*

Before the module starts:

Prepare flip charts:

1. "What makes a project successful?"
2. "PM experience" Put a time line on the flipchart labelled None, 3 months, 6 months, 12 months, 18 months, and 24+ months that participants can write their name next to.
3. "What I Want to Take Away from the Course" with three columns: Process, Objectives, Goals, for participants to add their Post-it notes to.
4. Post the Seven Keys Chart on the wall.



Ask: What makes a project successful?

Document participants answers on the flip chart

Challenge participants to think about success factors besides time and cost such as:

- Stakeholders delighted with results
- Client is achieving business benefits
- Quality of deliverables is appropriate
- Team worked well together
- Staff developed new skills
- Good communication between team and stakeholders
- Risks managed well, did not have to put out fires
- Schedule slippage was anticipated and managed
- Change management process worked well
- IBM's reputation increased with client
- Delivery organization's reputation increased
- Captured and shared lessons learned
- Captured and shared intellectual capital

Say: Link back to your pre-course work on the Seven Keys to Success. When you look at this list here, it maps very closely to the Seven Keys, and that is one of the reasons why we use it to monitor how close we are to success on our projects.

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



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Student Introductions

Say: Moving on, I would like to understand why you are here? Apart from hopefully wanting to be involved in running successful projects, I would like to ask each of you to complete the following details for me -for the first 3 items just think about your reply. In the last module of the PM Orientation class you were asked to write down what you wanted to get from this class. Take a couple of minutes to write those items on a Post-it note. You can use as many Post-it notes as you like!

Say: When thinking about what you want to take away from this course, try to be specific. Think about specific processes you want to learn about, such as risk analysis. Process learning is usually completed while we are doing an exercise. Objectives are usually achieved at the end of an exercise, such as understanding the risk management procedure used at IBM. And finally goals are long-term, usually achieved after the course.

Introduce yourself to the class, highlighting any project management experience you may have and your key learning objectives for the class.

Ask each participant in turn to introduce themselves. For point 3 ask them to mark their PM experience levels on the prepared flipchart (and it is okay to have none!) and ask them to add their Post-it notes to the flipchart called "What I Want to Take Away from the Course".

Note to trainers: Recommend spending a bit of time with each participant to understand their real objectives for being in the class and their specific knowledge levels (using the PM experience chart) so that you can draw on that experience during the course.

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



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Say: Thanks to all for sharing their experience levels and objectives – for those objectives that you know in advance you definitely won't be covering, make that clear to those participants up front and suggest that they speak with you at a break to think of other ways they can still meet their objectives.

For the rest of the objectives, link them to the agenda for the next three days, covered on the following slides.

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



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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.



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Objective: Practice PM soft skills

Before teams start to work on the case study, explain the Project Manager assessment and the next slides on guidelines for receiving and giving feedback.

Say: We will be running a number of case study activities where you will role play being PMs. This is a completely safe environment for you to try out some of the appropriate attitudes and behaviors we have just discussed.

As we work through activities this week, the participants on each team will take turns acting as the project manager for their team.

I know it will be difficult for some of you to sit back and allow the designated PM to run the exercise. Those of you, and you probably know who you are, that might have this tendency, be aware of this and please try not to take over the exercise when it is not your turn.

Instead, if a PM is having difficulty, perhaps try to facilitate, to help the PM do their job.

Another Note:

If there are 5 or more people per team, ask that each team also assign an Observer for each exercise. This be a rotating role like the PM role. This person would give feedback to the PM and the team members at the end of each exercise.

Receiving Feedback

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

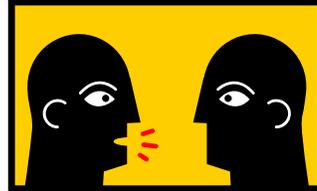


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Say: You will all have the opportunity to give and receive feedback on your role as PM. Let's just briefly look at some pointers to ensure this is a successful and helpful exchange.

Giving Feedback

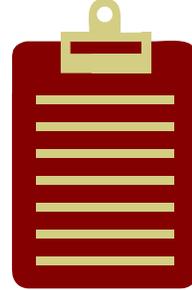
- Give both the positive and "even better if"
- Catch people doing something right
- Be descriptive
- Speak for yourself, not others
- Stay with known things, not hearsay
- Be sensitive - understand your audience



1-9

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)



1-10

Say: Before we take a break, I want to remind you of some key administration points that I would like you to commit to before we move on to the next module.

Discuss administrative information

Review your break schedule. Talk about keeping to the schedule.

Class will start on time. Lunches will be managed to a +/- 15-minute schedule. Each day should end within -15/+45 minutes before or after normal business hours.

Remind students that missing class puts a burden on their teammates.

If a student misses 2 hours of class, the student fails the class and must repeat the entire class.

Discuss the examination that will be given at the end of the class.

If a student fails the examination, the student can take it again on another day. If the student fails the second time, the student must take the course again

Ground Rules

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



1-11

Say: Can we ensure for all future modules that you agree and adhere to the following Ground Rules – do you have some more that you would like to see the class commit to?

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



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Note to trainer: During the Bridge Game, you should ask the least experienced PMs to assume the role of the project manager.

Summary of Documents to Hand Out to Teams

1. Handout 1-1 Project Manager Instructions
2. Handout 1-2 Official Bid
3. Handout 1-3 (after the bridge is completed, prior to the team debrief)

Further Instructions - Place one box with the Bridge Game materials at each team's table,

Activities during the Estimating Phase

When the Bridge Game starts, select a project manager for each team. Give the team's project manager the Project Manager Instructions, the Official Bid form, and the box with the bridge materials and blueprint.

You are playing the role of the client. Tell participants that you need a bid for building a bridge. The bid is an estimate of how many minutes it will take their team to build the bridge. The estimate or bid is based on the given blueprint and materials. Tell the teams to also pick a name for their team and write it on the **Official Bid** form.

Participants have 10 minutes to develop an estimate. They will need to complete the official bid form. The project managers should complete the form and give it to you. You will then fill in the Bridge Game result visual with the given information.

If participants used the bridge material to develop an estimate, ask them to place the material back in its original state.

Update the flip chart with the bids from each team.

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



1-13

Activities during the Build Phase

Tell participants that you now need not one, but X number of bridges where X equals the number of teams. On a flip chart or a white board, write down the time and tell participants to start building their bridges. While the participants are building their bridges, walk around and observe their progress. At some point before the first change has been issued, go to one of the team members, not the project manager, and tell this person either of two things:

- The team member has the 2-minute flu. Use this option with one student per team.
- You are a headhunter and you have found a better job for the team member. Tell this person that another team will pay more money and take them over to the other team. Introduce the new team member to the team's project manager. After a little while, take the same student to another team. Move the student two or three times, but ensure that the student's final team is the student's original team (If you take this option, do this with only one student, not one student per team).

Note: The point of making a team member sick or moving the team member around is to see how the project manager will react to a resource change.

At the point when each team has almost completed building the bridge, give each team's project manager the change request.

If the team's project manager requests additional time to implement the change, you should accept the change request and document the additional time requested by the team. Enter the time requested by the team in the PCR 1 time box, and enter the new total time on the Bridge Game results visual.

When the team has almost completed the requested change, the sponsor project manager should tell the team's project manager that the City Safety Board has told the safety board that the new design is unsafe and that the team will have to go back to the original blueprint.

If the team's project manager requests additional time to implement the change, you should accept the change request and note the amount of additional time requested by the team. Enter the times requested by the team in the PCR 2 time box,

When a team has **completed** their bridge, enter the actual time and actual cost in the boxes on the Bridge Game results visual (actual cost = actual time multiplied by the number of staff).

Tell the teams to take the bridge apart and put the material back in its original state.

The Bridge Game - Debrief



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Debrief Activity

Give the participants a few moments to gather their thoughts and complete Handout 1.3.

Start the debrief by asking the teams to only focus on items 2, 3, and 4 for now:

- What happened during the estimate phase?
- What happened during the build phase?
- What happened when the scope changed?
- What happened when the resources changed?
- What made the activity difficult/easy to do?
- Would having more screwdrivers and blueprints have helped?
- Did anyone think to ask for extra materials? Why not?
- What did you learn from this activity?

Leave these as very open questions for everyone to comment on, after there has had plenty of opportunity to comment it is worth showing the team's information on the Bridge Game results visual. The instructor should make some comments about the information as it relates to the team's performance and profit, or lack of profit. One common thing that can occur is that a team will underestimate its original bid and then try to make up for it with changes.

Complete the debrief with the questions:

- How does this relate to your work?
- How could you apply some of what we have just looked at in a real life work environment?

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.

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After teams have presented their results, give them a few minutes to provide feedback to the participant playing the PM for the activity. Encourage them to consider the comments they recorded on Handout 1.3 section 1 – Management

There is a pocket on the back cover of the Case Study Book for their feedback forms and handouts.

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.



1-16

Say: There are a couple of key points to be aware of from this slide – talk through the slide.

For full details on the background to the Case Study see the separate document called “**Module 1 Opening and case study background**”

Emphasize that this case study runs throughout the entire course.