INTRODUCTION TO

PROJECT MANAGEMENT

TEXAS ★ STATE
UNIVERSITY ®

The rising STAR of Texas

Texas State University Library Staff Professional Development

May 3, 2019

DEFINITION
PROJECT

- "A project is a temporary endeavor undertaken to create a unique product, service, or result."

  - All quotes in this presentation are from the PMBOK Guide, 6th ed.

PMI
Project Management Institute
GLOBAL**STANDARD**

A GUIDE TO THE
**PROJECT MANAGEMENT
BODY OF KNOWLEDGE**

**PMBOK®
GUIDE**

SIXTH EDITION

INCLUDES: THE STANDARD
FOR PROJECT MANAGEMENT
ANSI/PMI 99-001-2017
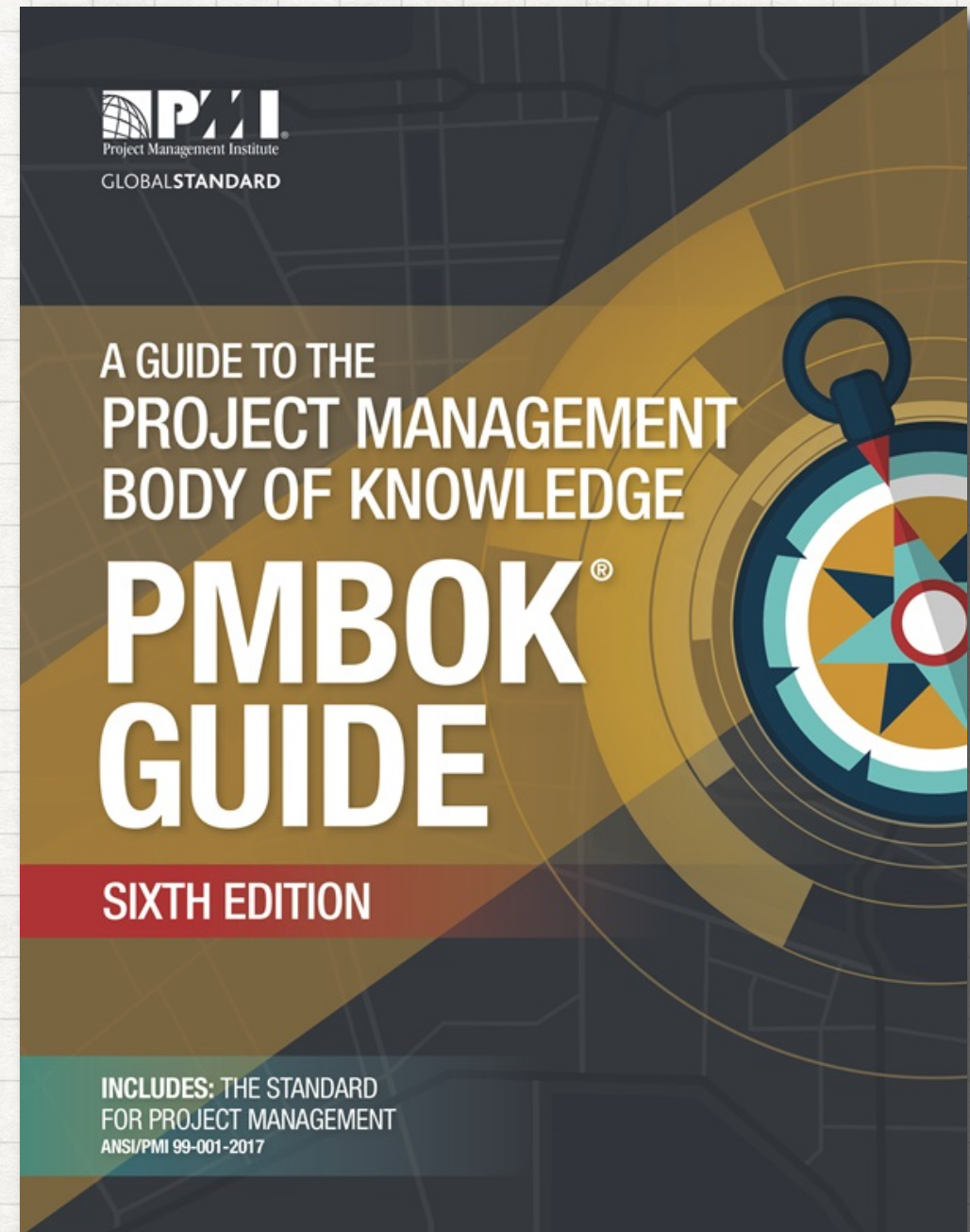
DEFINITION
PROJECT MANAGER

- "The person assigned… to lead the team that is responsible for achieving the project objectives"

- The Project Manager cannot work alone - they can only succeed by working well with the project team and communicating well with the sponsor.

- The job of the project manager is to LEAD a team and to COMMUNICATE with sponsors/stakeholders

PROJECT MANAGEMENT PROCESS GROUPS

- INITIATING
  - Defining the project, and gaining authorization
- PLANNING
  - Establish full scope, refine objectives, define actions to take
- EXECUTING
  - Processes to complete the work defined in planning
- MONITORING & CONTROLLING
  - Processes to track, review, and regulate progress
  - Identify and Initiate necessary changes to stay on track with requirements
- CLOSING
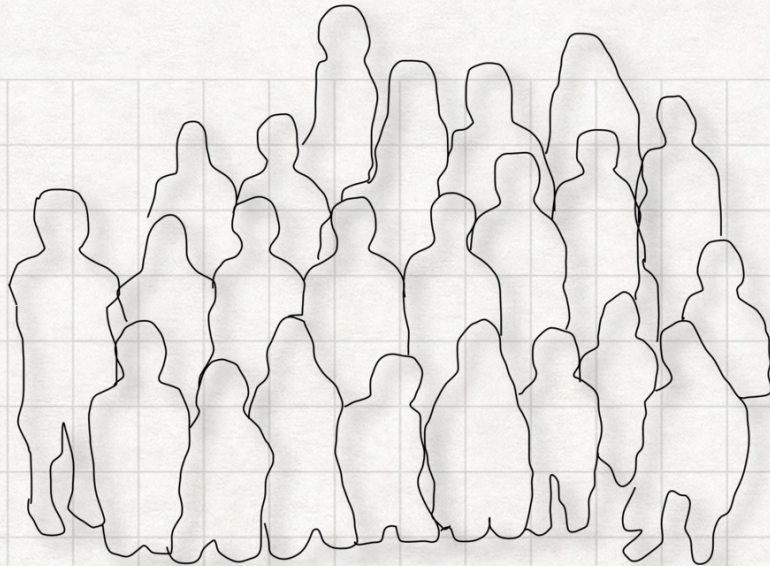 - Formal closure of a project, phase, or contract

DEFINITION
SPONSOR

"Person or group who provides resources and support for the project... and is accountable for enabling success"
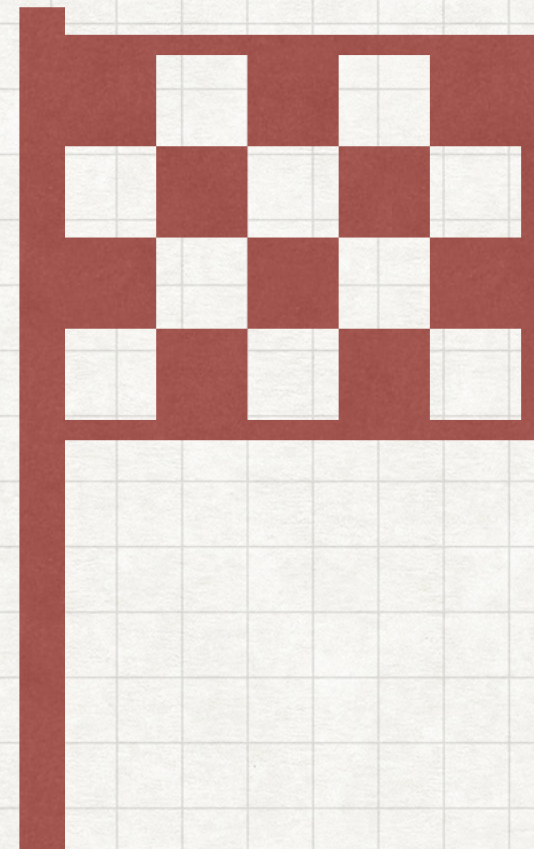
DEFINITION

STAKEHOLDERS

"An individual, group, or organization that
- may affect,
- be affected by, or
- perceive itself to be affected by a decision, activity, or outcome of a project…"

Types of Stakeholders:
- Key Stakeholders
- Project Team
- Other Stakeholders

DEFINITION
BUSINESS CASE

- "...used to create the project charter... and ... to determine whether the expected outcomes of the project justify the required investment."

- Parts:

  - Identify business need

  - Map outcomes that fulfill the need

 - Identify target outputs to show you met the outcomes

DEFINITION
OUTCOMES

- Not a PMBOK term, but it is common and required for policy (which we'll get to soon)

- OutCOME - why? (keep asking why until you finally get back to core business objectives like mission, vision, strategic plan)

- Output (or targets or goals) - how will you measure whether you meet your outcomes?

DEFINITION
DELIVERABLE

- "…any unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a process, phase, or project."

- A THING you DELIVER to SHOW you're ON TRACK
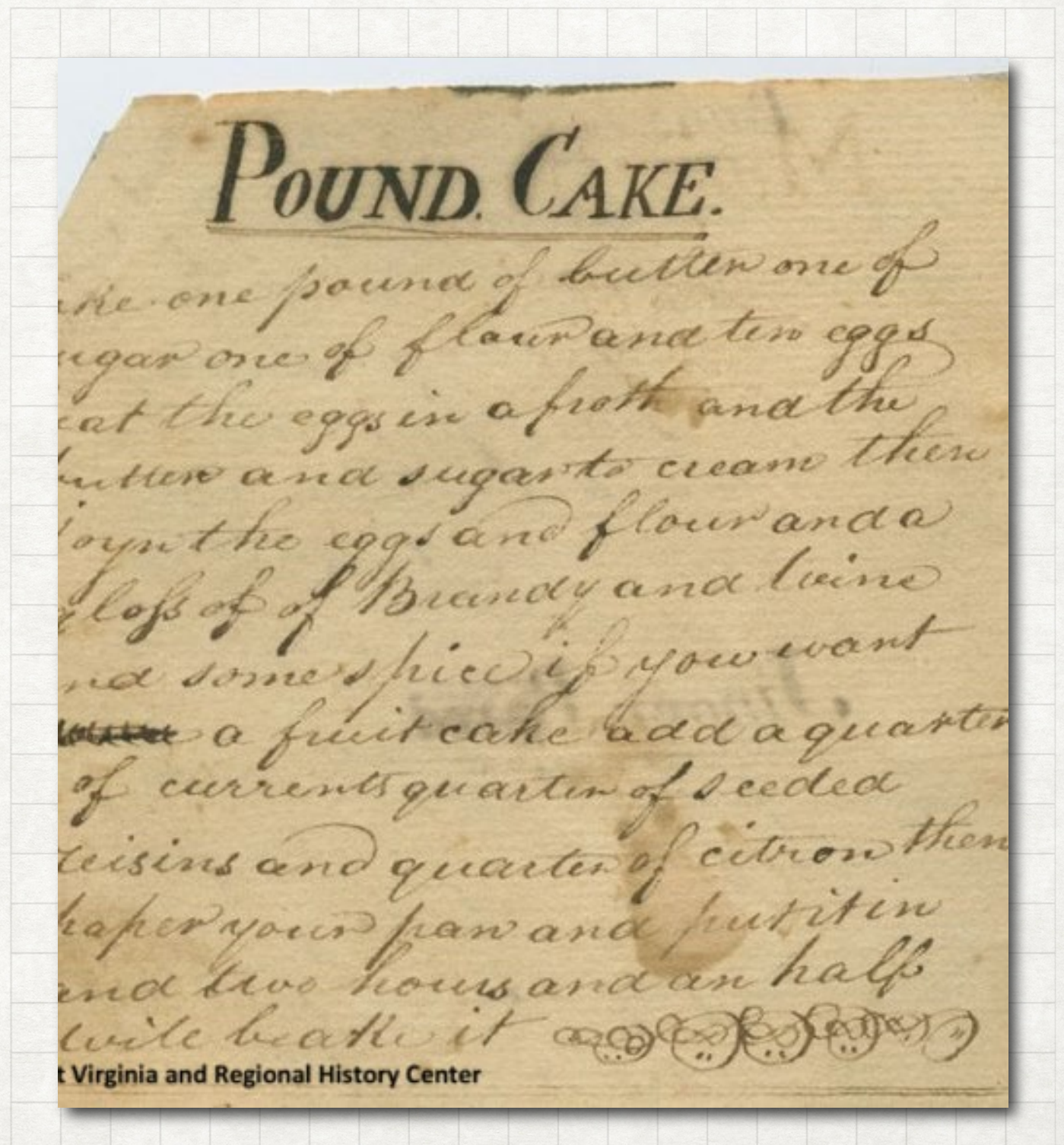
Recipe from Miss Catharine Baker's Receipt Book

DEFINITON
REQUIREMENT

- "Condition or capability that is necessary to be present in a produce, service, or result to satisfy a business need"

DEFINITON
SCOPE

- The boundaries of your project: What it does

  - And what it does NOT do

- Be sure to address what is out of scope, especially any assumptions that may exist for your stakeholders or requirements that exist that you cannot address

DEFINITION
PROJECT CHARTER

- "A document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities."

DEVELOPING THE PROJECT CHARTER
INPUTS, TOOLS & TECHNIQUES TO USE

INPUTS

- Business case

- Agreements

- Enterprise Environmental Factors Culture/Norms)

  - Ex: Risk aversion?

- Organizational Process Assets (Policies, templates, similar projects)

  - Ex: Policy: IT PPS 4.10

  - Ex: Project Charter Template

TOOLS & TECHNIQUES

- Expert Judgment

- Data Gathering

  - Brainstorm

  - Focus Groups

  - Interviews

- Interpersonal and team skills

  - Conflict Management

  - Facilitation

  - Meeting management

- Meetings

FIELD TRIP

- Go to IT PPS 4.10

- Locate IT Templates for Project Management

  - Search TXState.edu for ITAC Project Management Templates

VIEW SAMPLE CHARTER

TEXAS ★ STATE
Project Charter

Project Name:	Sister's wedding cake	Project ID:	#1!
Requestor/Key Stakeholder:	Sister	Charter Date:	5/1/19
Stakeholder Department:	Family	Associated Project(s):	Sister's wedding!
Executive Sponsor(s):	Mom ($$)	Project Tier:	Tier 3 (see policy)

Mandate:	☐ No	☐ Yes	If yes, date required:	*Click here to enter a date.*

1. Project Goal/Description:
What is the purpose and/or the business need for this project? What business benefits will be achieved?

Description: Baking a wedding cake for sister's wedding.
Business Need: Fulfill a girlhood dream

2. Scope Definition and Project Outcomes/Deliverables & Measures of Success:
What work will be included as part of this project? What work will not be included as a part of this project?
How will the project be defined as completed? What are the high level deliverables?
What metrics should be measured six months after completion to determine success of project?

In Scope: Baking a test cake, adjusting, Baking final cake, delivering final cake
Out of scope: Serving cake, purchasing serving utensils, purchasing and delivery plates/forks/napkins, etc.
Outcome: Fulfill Girlhood Dream
Deliverables: Test cake, Taste test, and Final Cake and Delivery
Completion requirement: 3 tiers, serves 100 people, Must have figurines
Measures of success: Taste test with achievable adjustments to recipe, Meets requirements
6 months later: Look back on fond cake memories – yummy!

3. Project Team/Key Stakeholders/Roles:
Who are the key people and key areas that need to be involved in this project?
If the project requires resources from other departments/teams, a representative from each should be listed.
Include key stakeholders, account manager(s), executive sponsor(s), project manager(s), developers etc.

Name	Role on Project Team	Department	NetID/Contact Info
Sister	Sponsor		
Mom	Money-lady		
Dianna	Project Manager and Baker		
Andrew	Delivery guy		
Church lady	Helps with delivery and setup		

4. Organizational Groups Impacted:
Who are the key people and/or areas that will be impacted by the work on this project, or by the work and the results of this project?
List the user groups for this project (i.e. students).

Wedding attendees
Church workers

5. Software/Databases Impacted:
What existing applications or databases will be impacted by the work on this project, or by the results of this project?
What integration points will be necessary with existing systems for this project to be successful?

N/A

TEXAS ★ STATE
Project Charter

6. Ownership
If this project involves the implementation of a software product, what department will be responsible for the administrative management (such as adding users, removing users, configuration changes)?
What department will be responsible for the technical support of this product (maintenance, upgrades, code changes etc.)?

Dianna will own the cake and be responsible for support/adjustment of the cake after delivery (ex: If decorations are messed up during delivery). Once wedding begins, cake is in final state.

7. Security /Risk Assessment:
What security risks are associated with implementation of this project?
Who will be responsible for addressing these risks and how?

NA

8. Scheduling Requirements (Anticipated Timeline/Milestones):
Is there an externally—or internally—driven completion date (or other limitation) for this project? If so, please indicate and explain.
Are there specific milestones that must be met on certain dates?

Wedding date: 5/27!!!
Taste Test: No Later than 5/16
Must have basic recipe no later than 2/26, so that allergy information can be included on invitation

9. Funding Requirements:
Will funding be required for the purchase of services or products (software/hardware) for the project?
If so, describe what will need to be funded, the anticipated costs/budget estimates and funding sources.
All account managers of the funding sources should be included as stakeholders on this charter.
This section provides a summary of estimated costs associated with the objectives of this project. This is intended to present probable funding requirements.

Estimated budget: $100

Authorization/Charter Approval:
Type the name of each Project Team Member and their title and route for electronic signatures.
Sister   Sponsor
Mom   Money-lady
Dianna   Project Manager and Baker
Andrew   Delivery guy
Church lady   Helps with delivery and setup

Attachments (could include requirements, major deliverables, Project Management Plan, gantt chart, executive milestones, communication plan, etc.):
Include the name of the document and a description

☐
☐

DEFINITION
RISKS AND CONTINGENCIES

- Knowable and Unknowable Risks

- Contingencies/Responses to risk:

    - Escalate

    - Avoid

    - Transfer

    - Mitigate

    - Accept

SCHEDULE DEFINITION
WBS: WORK BREAKDOWN STRUCTURE

- "A hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables"

- Start with aspects of scope or deliverables, break them down into "work packages - the work defined at the lowest level of the WBS for which cost and duration are estimated and managed".
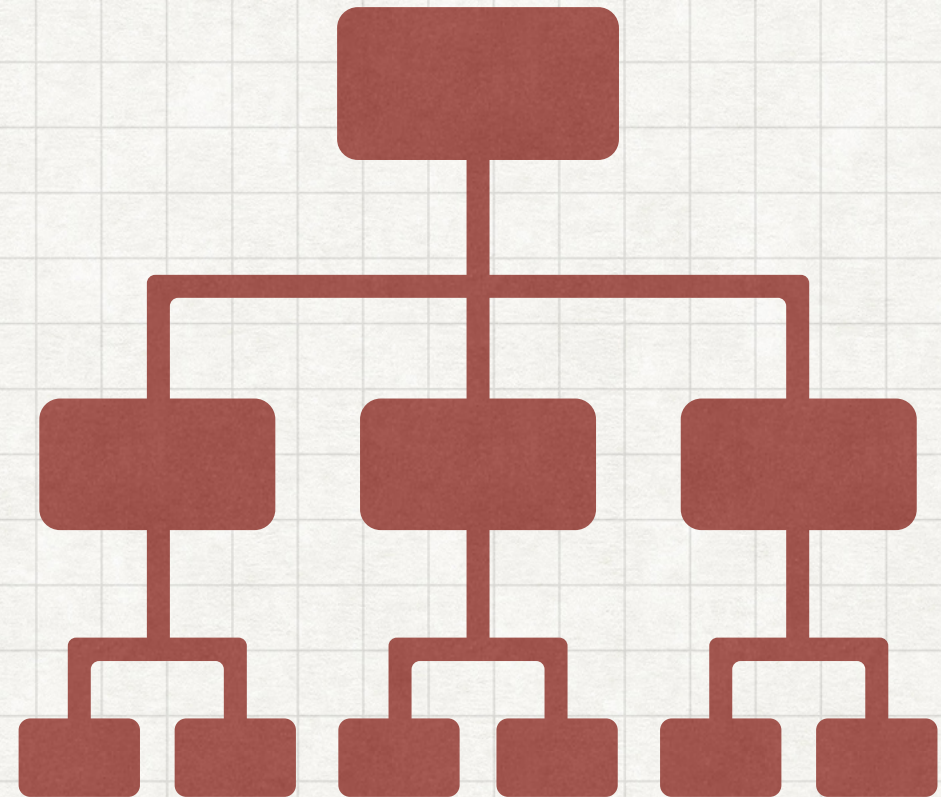
SCHEDULE DEFINITION
DEPENDENCIES

- A logical relationship between two tasks when one task must happen before/after/alongside another

- You must bake the cake before your sister can taste it

- Related terms: Predecessor

    - Network Diagram

    - Network Path

    - Critical Path
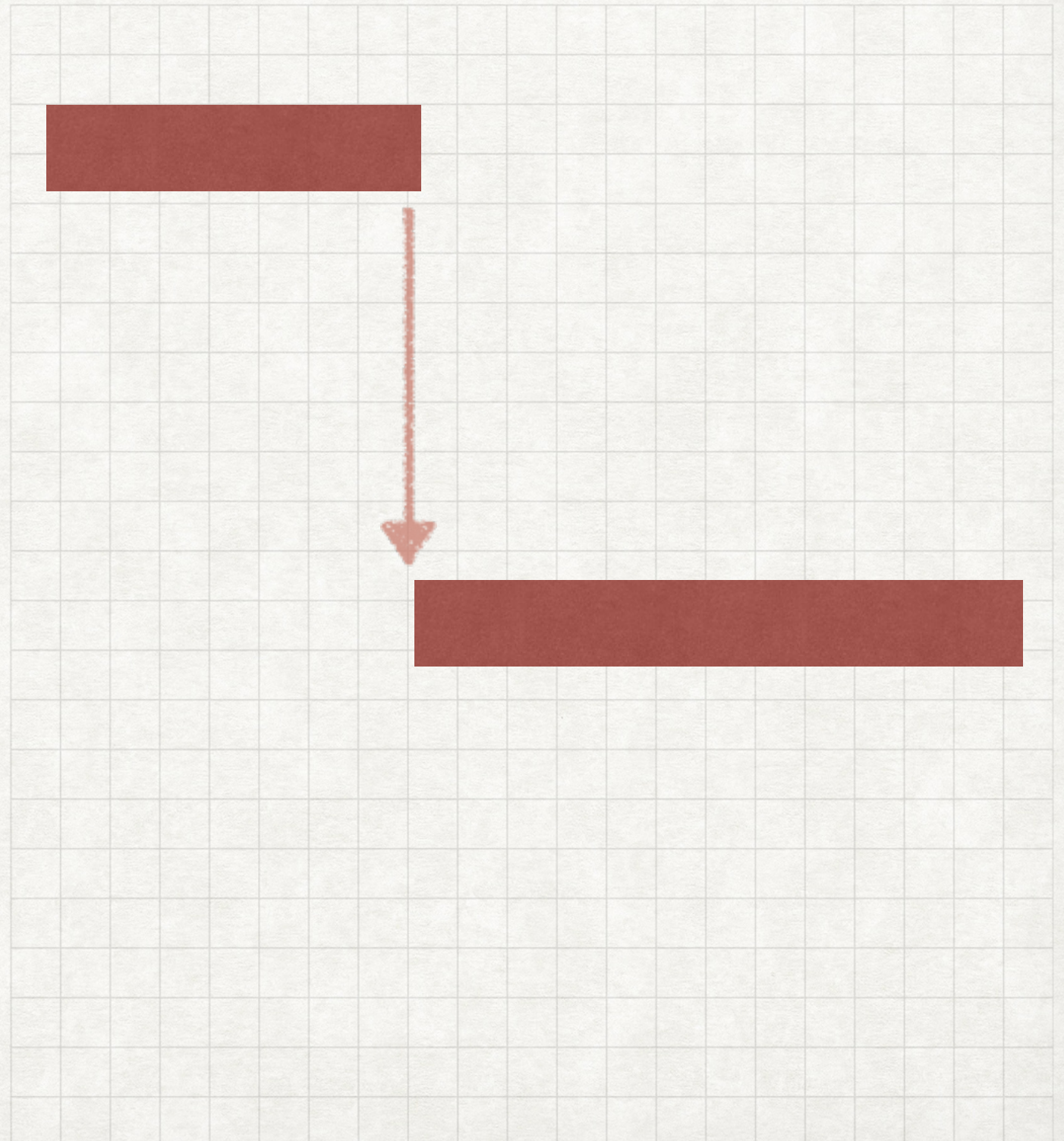
SCHEDULE DEFINITION
MILESTONE

- "A significant point or event in a project…"

- Map these into your schedule!

  - A diamond is traditional marker for a milestone on a visual calendar

- A TIME/EVENT to CHECK IN with team and stakeholders to SHOW/CELEBRATE you're ON TRACK
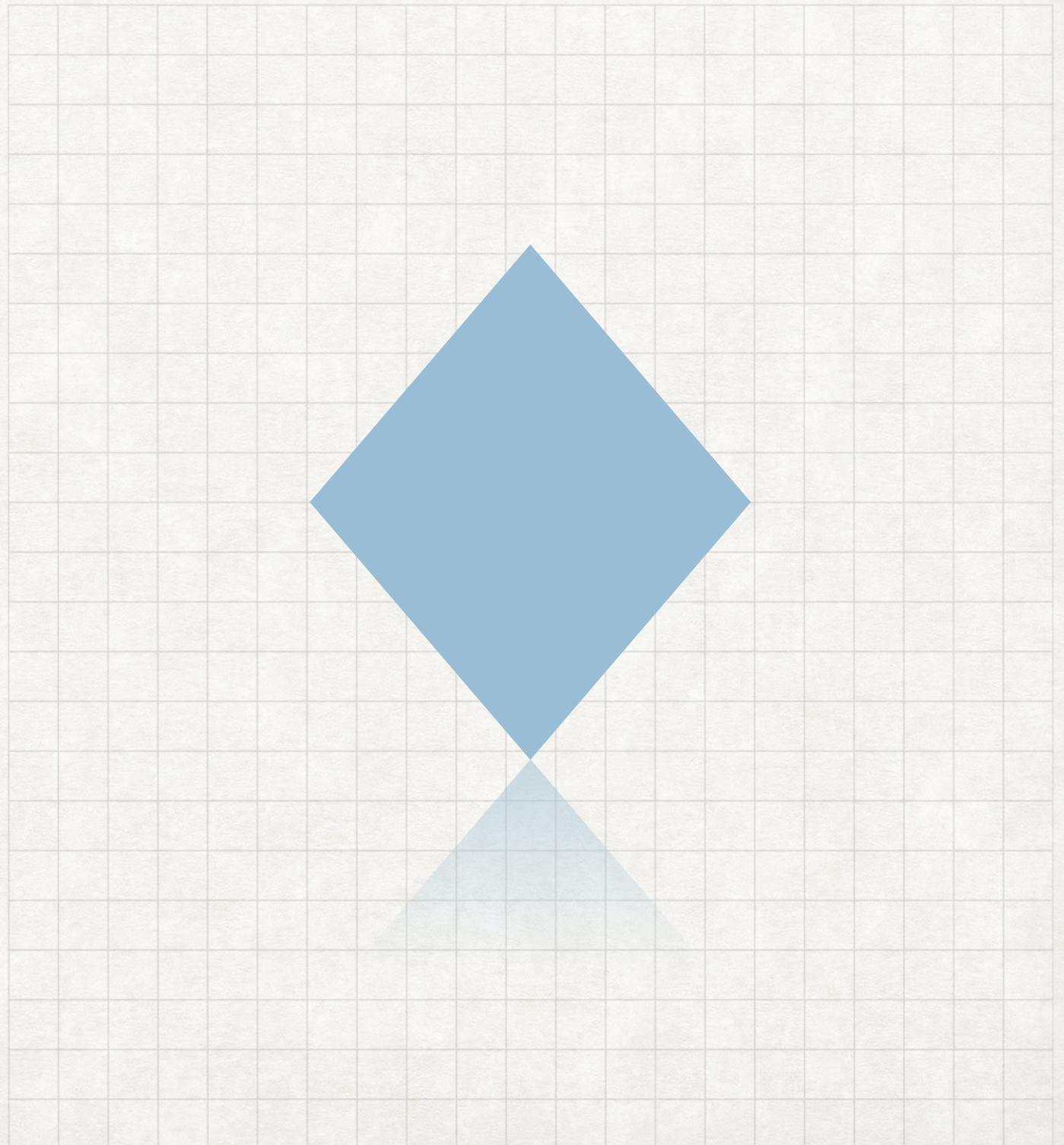
SCHEDULE DEFINITION

GANTT CHART

- "A bar chart of schedule information where activities are listed on the vertical axis, dates are shown on the horizontal axis, and activity durations are shown as horizontal bars place according to start and finish dates"

- Basically a visualization of the schedule and a reporting mechanism.

	January	February	March	April
Task A				
Task B				
Task C				
Task D				
Milestone				
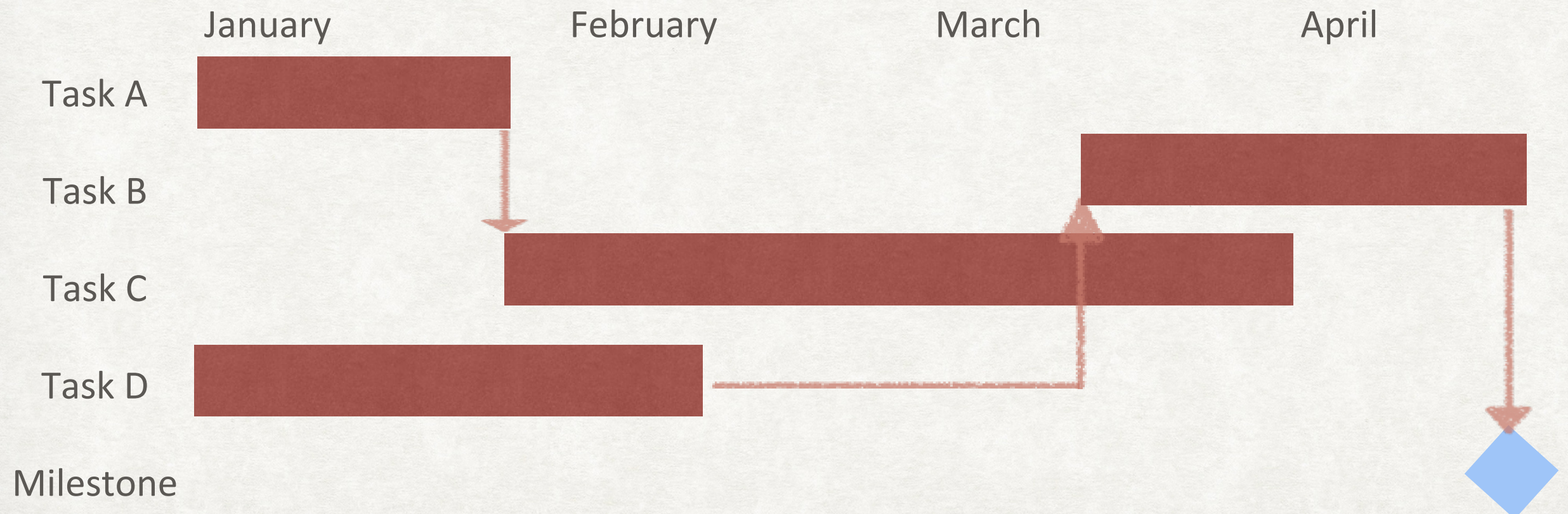
ACTIVITY
CREATE WBS FOR CAKE

WBS SAMPLE

WBS for Sister's Cake

Thursday, May 2, 2019   12:34 PM

Cake

Recipe
- find
- Approval analysis
- Adjust

baking
- Buy Ingredients
- Bake test
- Bake final
- Deliver Final Cake

Testing
- Schedule taste test
- Taste Test
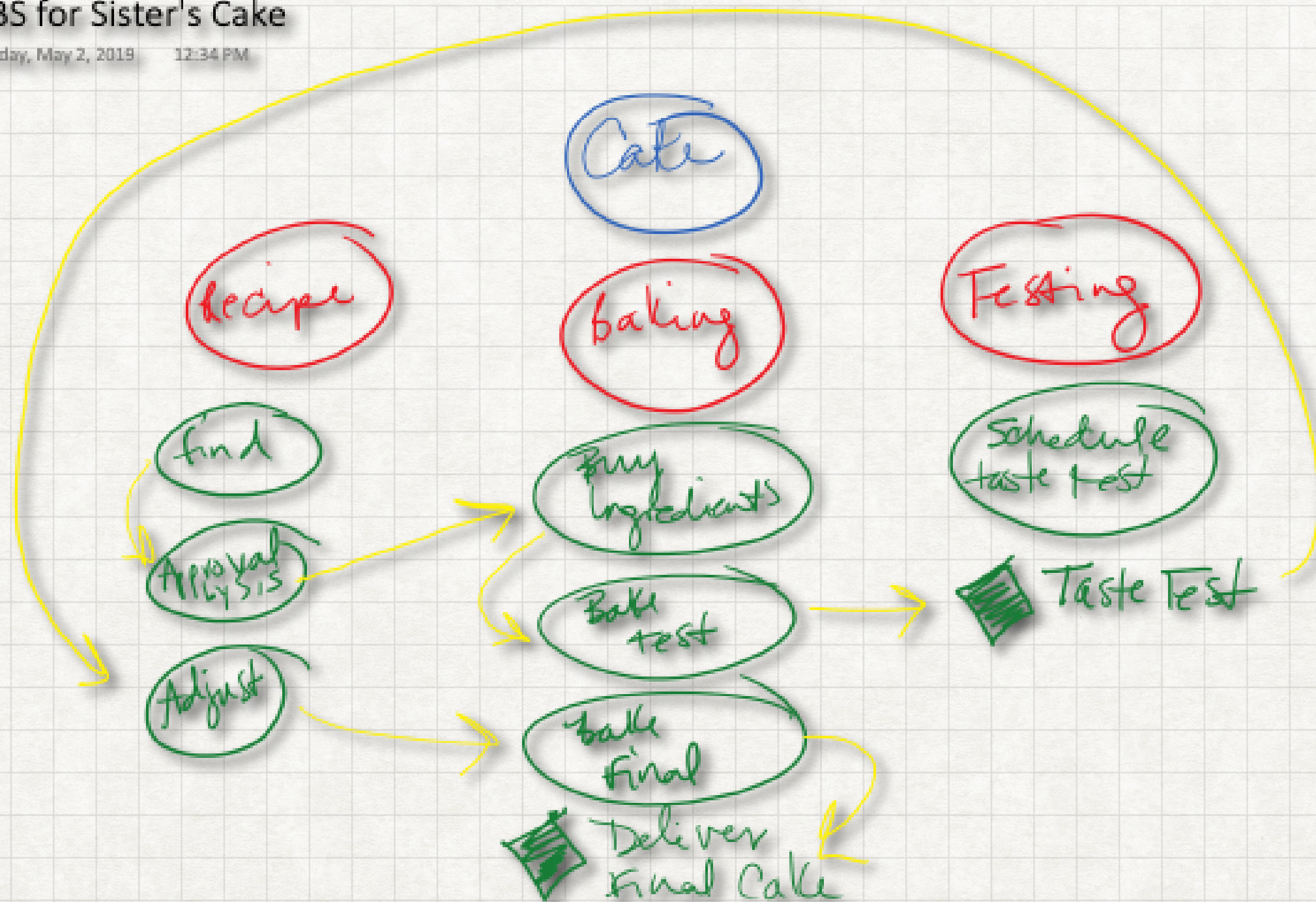
WBS INTO PROJECT

	Task Name	Duration	Start	Finish	Predecessors
1	◢ **Cake**	**18 days**	**Thu 5/2/19**	**Mon 5/27/19**	
2	◢ **Recipe**	**17 days**	**Thu 5/2/19**	**Fri 5/24/19**	
3	Find recipe	5 days	Thu 5/2/19	Wed 5/8/19	
4	Get approval of recipe	7 days	Thu 5/9/19	Fri 5/17/19	3
5	Adjust recipe	3 days	Wed 5/22/19	Fri 5/24/19	13
6	◢ **Baking**	**6 days**	**Mon 5/20/19**	**Mon 5/27/19**	
7	Buy ingredients	1 day	Mon 5/20/19	Mon 5/20/19	4
8	Bake a test cake	1 day	Tue 5/21/19	Tue 5/21/19	7
9	Bake final cake	1 day	Mon 5/27/19	Mon 5/27/19	13,5
10	Deliver cake	0 days	Mon 5/27/19	Mon 5/27/19	9
11	◢ **Testing**	**14 days**	**Thu 5/2/19**	**Tue 5/21/19**	
12	Schedule taste test	3 days	Thu 5/2/19	Mon 5/6/19	
13	Taste test	0 days	Tue 5/21/19	Tue 5/21/19	8

GANTT VIEW

ID	Task Name	Duration	Start	Finish	Predecessors
1	**Cake**	**18 days**	**Thu 5/2/19**	**Mon 5/27/19**	
2	**Recipe**	**17 days**	**Thu 5/2/19**	**Fri 5/24/19**	
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PROJECT COMMUNICATION PLAN

Stakeholder/Audience	Owner of communication	Method of communication	Frequency or date	Content of Communication
Sister	Baker (Dianna)	Verbally	Weekly (at weekly dinners)	How it's going - sample cake if available
Mother of bride	Budget person (Dianna)	In writing via email	At any and all changes of budget	Current updated budget
Attendees	Sister	Insert into the invitation	No later than 6 weeks before wedding - 2 weeks notice for printing printing	Allergy content of cake (must have final recipe)

DEFINITION
PROJECT BUDGET

Alkek Library - FY2020 Budget Preparation
Equipment/Software/Service/Other M&O Request

ting Department lead(s)	
ting ment(s)/Unit(s)	
ibrary staff d in request	Please list the names of others you have consulted or included in the commun process while developing this request:
of Potential se	
tion of Potential se	
, 3 lowest)	
stimate	
information	If you have worked with a vendor on the cost estimate, please provide contact information (name, ph#, email):
le/Justification of Potential Impact	
ed Timeline & es if applicable	

PROJECT ESTIMATING
4 METHODS WITH EXAMPLES

- Analogous estimating (use previous projects or components - ex: my last wedding cake cost around $500 to make)

- Parametric estimating (use per-person or per-square foot costs to estimate - ex: a 500-person wedding cake cost $500, so a 100-person wedding cake may cost about $100)

- Bottom-up estimating (use cost of ingredients and preferred profit to estimate)

- 3-point estimating (mathematical formula you use with 3 estimates you get from experts: M: most likely cost, O: an optimistic cost, and P: a pessimistic cost: estimate=(O+4M+P)/6

DEFINITION
PROJECT CLOSURE

- "Closing Project or Phase is the process of finalizing all activities for the project, phase, or contract. The key benefits of this process are the project for phase information is archived, the planned work is completed, and organization team resources are released to pursue new endeavors."

- How? (next slide)

Outcomes of presentation.
- 16 attendees discussed recent research by an undergrad student presenter, **fulfilling goal** of promoting undergraduate research
- Student deposited their presentation into the IR, **fulfilling the goal** of teaching the IL Frame: "Scholarship as Conversation"

INPUTS, TOOLS&TECHNIQUES, AND OUTPUTS
OF PROCESS OF PROJECT CLOSURE

INPUTS:

Charter and Business Case

Requirements Product/Event/Service Outputs

Issues/Lessons Learned/etc

Agreements

TOOLS AND TECHNIQUES:

Expert Judgment
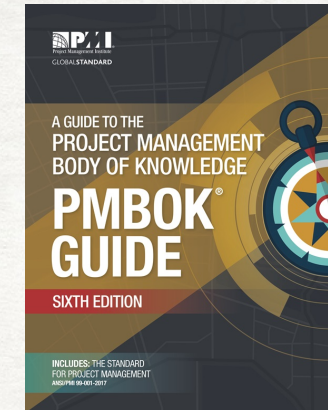
Data Analysis

Meetings

OUTPUTS:

Project document updates (Lessons Learned)

Final Product/service/result transition

Final report

Updates to any Policies or OPAs

HOW CAN I LEARN MORE??

- Check out the PMBOK, 6th edition from the library

- lynda.com has 125 courses on Project Management for self-paced learning in concepts and tools

- Career training from txstate.edu's partnership with Ed2Go:

  - Bonus: The hours in Ed2Go count toward official project management training hours*

- Learn how to become a CAPM® or PMP® through PMI

  - Project Management Institute or ProjectManagement.com

OR CONTACT YOUR FAVORITE LOCAL PMP®

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