

Project Management

How to know what should happen



1. Basics



Reality of Project Management

- **Make the plan**

Reality of Project Management

- **Make the plan**
- **Execute the plan**

Reality of Project Management

- **Make the plan**
- **Execute the plan**
- **Expect the plan to change**

Reality of Project Management

- **Make the plan**
- **Execute the plan**
- **Expect the plan to change**
- **Adapt to the new plan**

Reality of Project Management

- **Make the plan**
- **Execute the plan**
- **Expect the plan to go off rails**
- **Throw away the plan**

Project Limitations

Project Limitations

- Goal

Project Limitations

- Goal
- Target Audience

Project Limitations

- Goal
- Target Audience
- Budget

Project Limitations

- Goal
- Target Audience
- Budget
- Time

Project Dependencies

Project Dependencies

- Partners

Project Dependencies

- Partners
- Third Parties

Project Dependencies

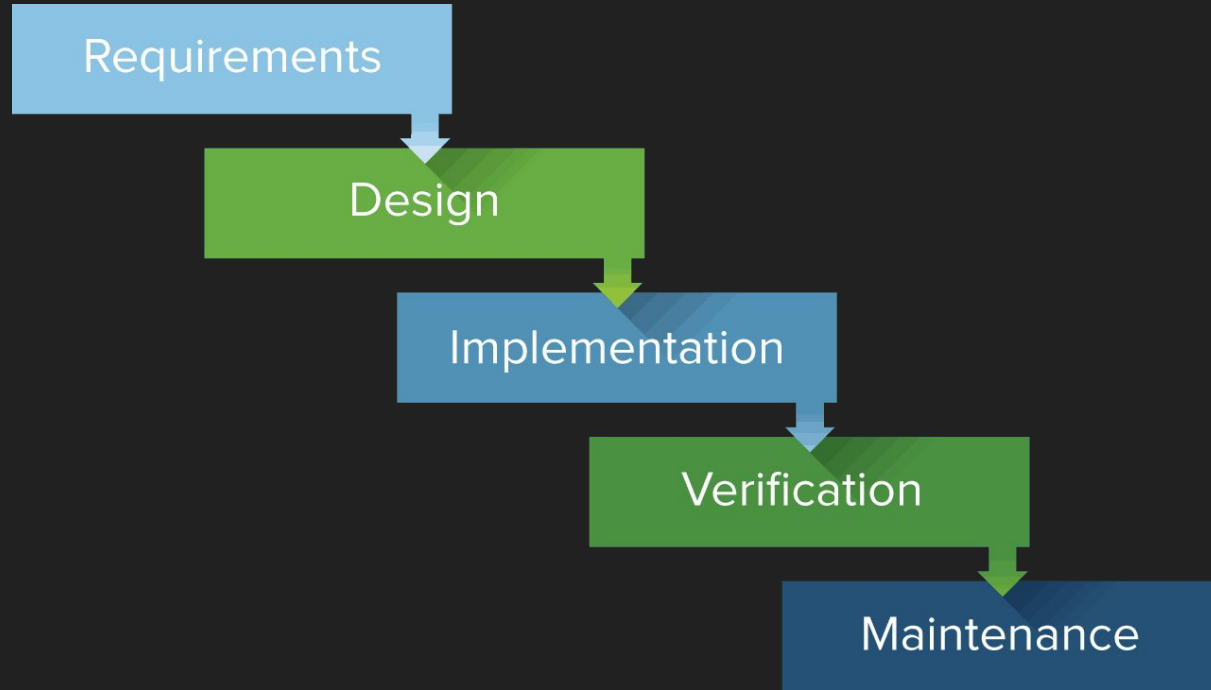
- Partners
- Third Parties
- Legal Third Parties

Project Dependencies

- Partners
- Third Parties
- Legal Third Parties
- **Administrative Third Parties**

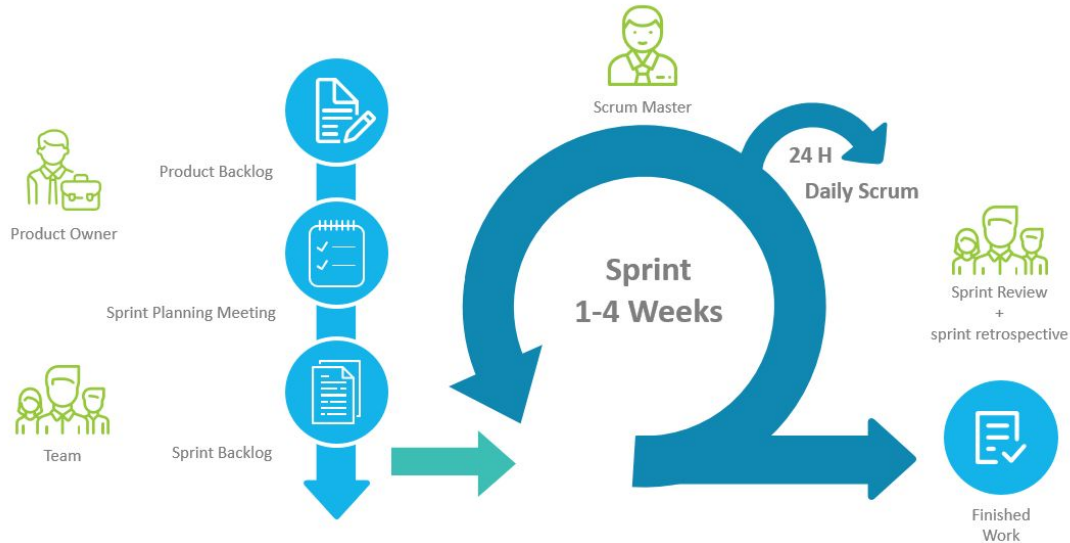
Roles vs Specialists

Waterfall Methodology

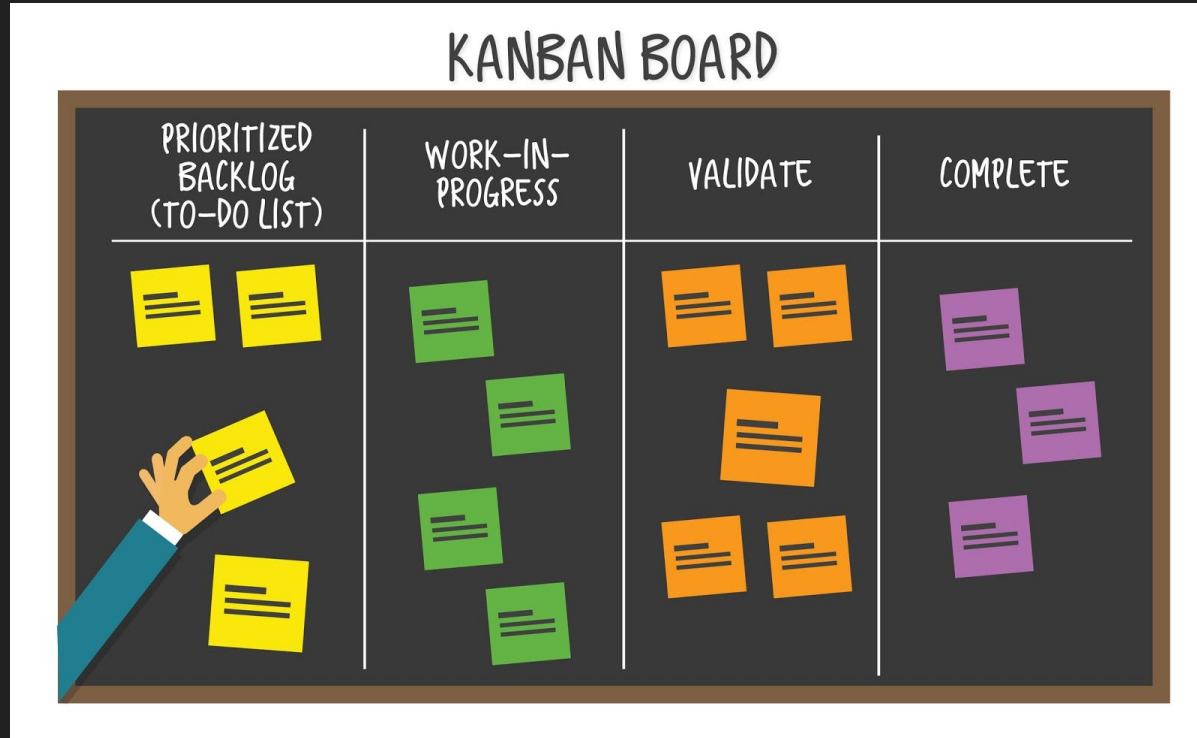


Agile: Scrum

AGILE SCRUM PROCESS



Agile: Kanban



Risk Management

Risk Management

- Budget Changes**

Risk Management

- Budget Changes
- Human Capital

Risk Management

- Budget Changes
- Human Capital
- Legal Changes

Risk Management

- Budget Changes
- Human Capital
- Legal Changes
- **Project Scope Changes**

2. Project Phases



1. Project Brief

- Short Description

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- Project Goal

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- Requirements and Expectations

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- Limitations: Time, Budget, Target Audience, Other Resources

1. Project Brief

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- Dependencies

2. Research

- **Essential - Never Skip**

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- **Essential - Never Skip**
- **Documented**

2. Research

- **Essential - Never Skip**
- **Documented**
- **Conclusions**

3. Technical Plan

- Project Brief

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- **Project Brief**
- **Roadmap / Implementation Plan / Execution Plan**

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- **Project Brief**
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- **Budget**

3. Technical Plan

- **Project Brief**
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- **Budget**
- **Team**

3. Technical Plan

- **Project Brief**
- **Roadmap / Implementation Plan / Execution Plan**
- **Budget**
- **Team**
- **Success Metrics**

4. Project Kickoff

- Sign all documents

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- Sign all documents
- Visibility on the project plan for all stakeholders

4. Project Kickoff

- Sign all documents
- Visibility on the project plan for all stakeholders
- Adjust roadmap

5. Project Execution

- Regular Meetings

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- Regular Meetings
- Visibility on Progress / Reporting

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- Regular Meetings
- Visibility on Progress / Reporting
- Risk Assessment

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- Regular Meetings
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- Risk Assessment
- Stakeholder Management

5. Project Execution

- Regular Meetings
- Visibility on Progress / Reporting
- Risk Assessment
- Stakeholder Management
- Plan Adjustments and Revision of Goal

6. Project Closure

- Project Sign Off

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- Project Sign Off
- Project Closure Report

6. Project Closure

- **Project Sign Off**
- **Project Closure Report**
- **Feedback**

3. Communication



1. Daily Meetings



2. Regular Reporting



3. Tools for Business



Microsoft Teams

4. Project Tools



1. Roadmap

<https://up.com.au/tree/>



Why Up?

Pricing

About

Support

Roadmap

Blog

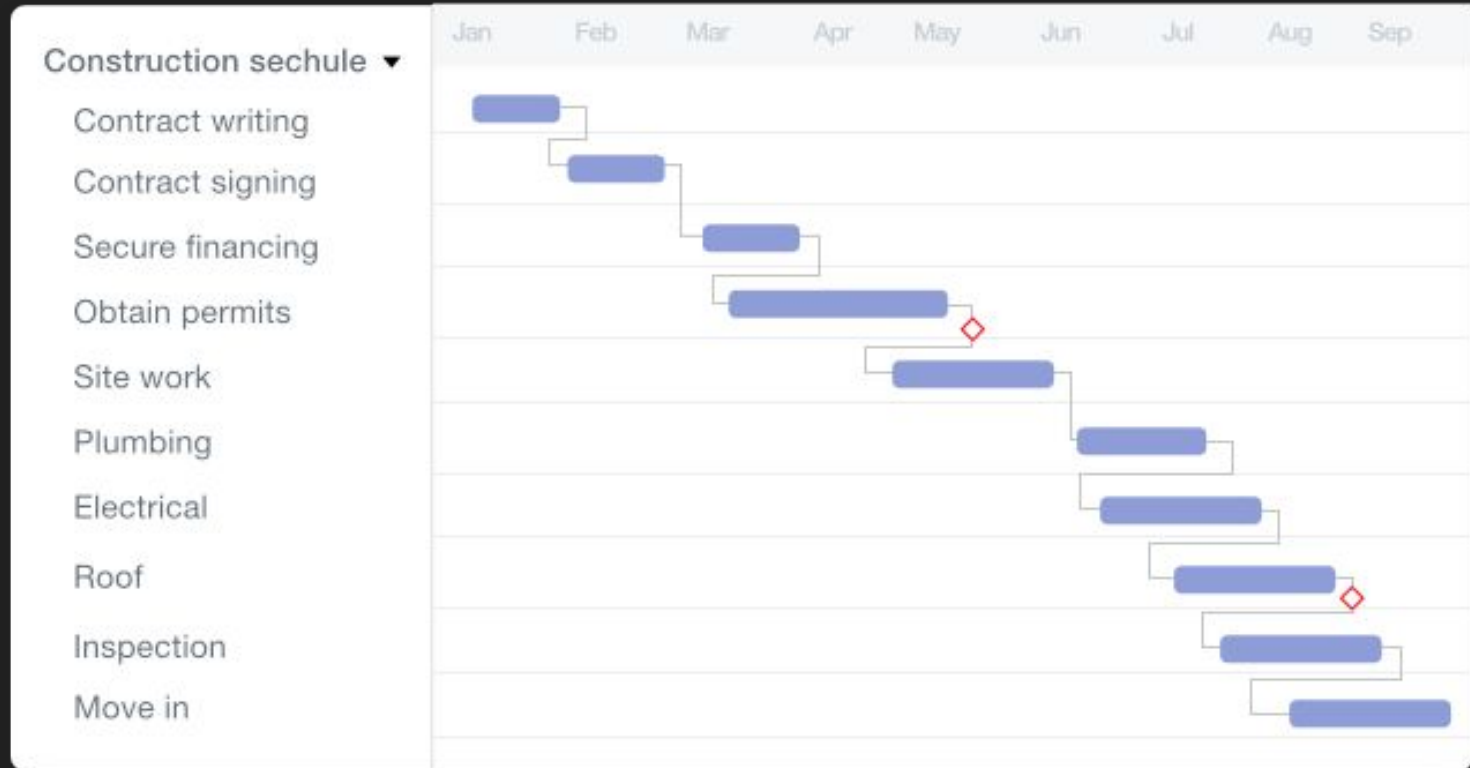
Join Up!

Get wise with your
money. Upgrade
your banking.

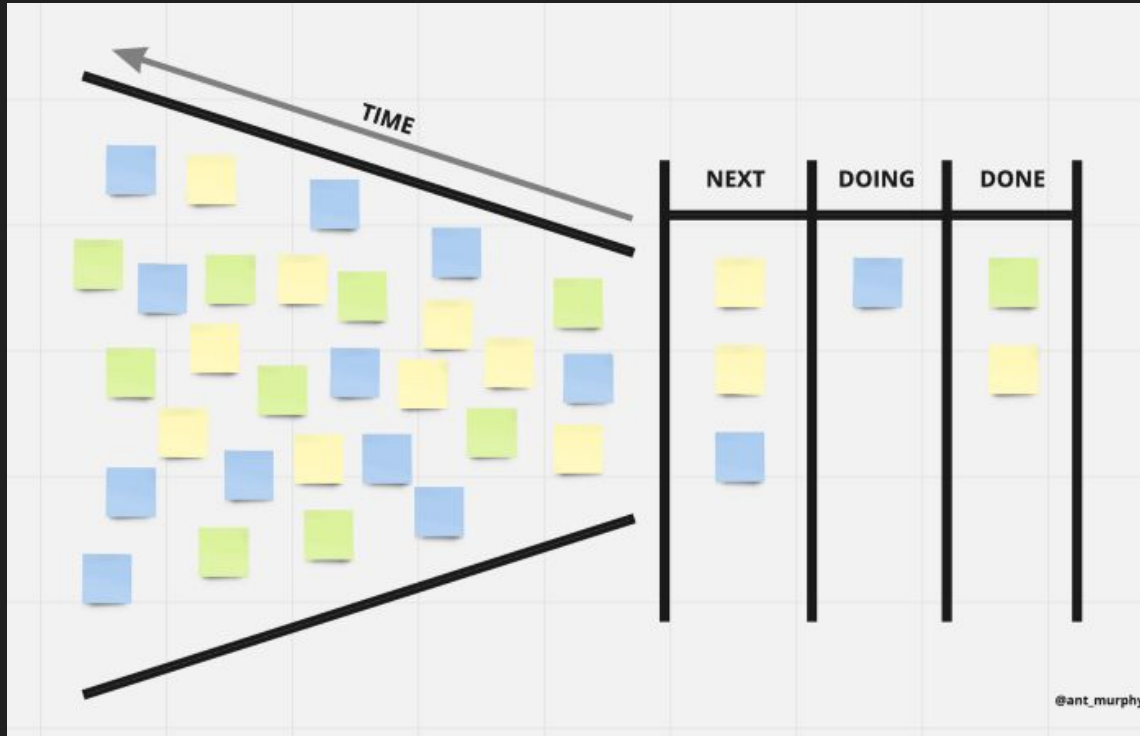
Up is a digital bank designed
to help you organise your
money and simplify your life.



2. Gantt Chart



3. Backlog



5. Project Task Management



1. Trello

Team Goal Setting Central

Goal 1: Grow Customers By 25%

Trello Tips
Trello Tip: Set S. M. A. R. T Goals (Click for more info)

Goal Stakeholders

At Risk
Current Progress Towards "Grow Customers By 25%"

Up Next
Launch customer referral email program.
Jan 31

Trello Tips
Trello Tip: Cards can summarize specific projects and efforts that your team is working on to reach the goal.

Goal 2: Reduce Office Supply Costs By 15%

Achieved! **Up Next** **At Risk**
Missed (for now) **In Progress**
On Track **Trello Tips** **Planning**

Trello Tip: Card labels! What do they mean? (Click for more info)

Goal Stakeholders

On Track
Current Progress Towards "Reduce Office Supply \$\$ By 15%

In Progress
Reduce total team printing volume by 20%

Achieved!
Negotiate loyalty discount with supplier for new fiscal year

Goal Template

Trello Tip: Keep a list "template" that you can copy and rename for each new goal.

Goal Stakeholders

On Track
Current Progress Towards Goal

Trello Tips
Trello Tip: Try these 5 team-building exercises for setting goals! (Click for more info)

Done (Q1 2019)

Trello Tips
Trello Tip: Put finished projects and closed goals here.

Achieved!
Hire 5 new people for 2019!

Done (Q4 2018)

Trello Tips
Trello Tip: Create new "Done" lists for each quarter to build a history of accomplished goals.

2. Excel

	A	B	C	D	E	F	G	H	I	J	
1		John				James				Jack	
2	#	Description	Received	Counter	#	Description	Received	Counter	#	Description	
3	1	Talk to production support manager and ask him to do his side of tasks for project X.	17-Mar	4	1	Draft plan for Q3 and publish that after reviewing with Project Management Team.	20-Mar	3	1	Complete testing of BAU changes and upload into QA systems.	
4	2	Submit passports for travel and arrange accommodation for the travel.	16-Mar	5	2	Draft communications plan template and send to approval from all the stakeholders.	20-Mar	3	2	Send notification to users to confirm the date project.	
5	3	Upgrade the system for latest anti virus software to avoid penalties.	14-Mar	7	3	Organize a meeting with Project Board to understand approval process.	17-Mar	4	3		
6	4	Fill the form to claim expenses form the FCA.	21-Mar	2	4	Generate latest account for software licenses.	16-Mar	5	4		
7	5	Plan the team holidays and update company register for the dates.	11-Feb	28	5				5		
8	6		17-Mar	4	6				6		
9		Joseph				Jorrat				Jamie	
10	#	Description	Received	Counter	#	Description	Received	Counter	#	Description	
11	1	Work with the business analyst to understand requirements better.	20-Mar	3	1	Organise a meeting to have overview of the required documents for project XYZ.	20-Mar	3	1	Update the PPM to reflect the latest status.	
12	2	Ensure all the documents are in-order so that we do not have any audit issues.	21-Mar	2	2	Book meeting with project team and vendor to understand vendor reqs.	16-Mar	5	2	Update the project status report and send it to team ASAP.	
13	3	Document functional procedures to avoid issues after the task is complete.	20-Mar	3	3	Finalize project plan for project ZERT and publish the plan to the team.	20-Mar	3	3	Draft estimates for website development plan.	
14	4				4	Follow-up on number of defects observed in testing cycle.	12-Mar	8	4	Create draft WBS for the team.	
15	5				5				5		
16	6				6				6		
17											

Task Tracker - 6 Team

Task Tracker - 3 Team

Config

+

Ready

3. Asana

Annual conference plan						12		Share		Search		+		7		i	
List						Timeline		Calendar		Progress		Forms		More...			
+ Add Task																	
Task name						Assignee		Due date		Task progre...		Priority		+			
Foundational:																	
◆ Finalize event budget						Alejandro L...		Oct 7		On Hold		High					
◆ Finalize event agenda						Kat Mooney		Oct 10		Waiting o...		Med					
◆ Determine event location						Kat Mooney		Oct 4		Waiting o...		High					
Travel + lodging:																	
◆ Finalize hotel block for guests						Daniela Var...		Oct 14		On Hold		High					
📄 Finalize conference travel plans						Nikki Hend...		Oct 21 - 23		Not Start...		Med					
📄 Book team travel						Alejandro L...		Oct 16 - 18		Not Start...		Med					
Vendors:																	
📄 Hire DJ						Alejandro L...		Oct 17 - 18		On Hold		Low					
📄 Hire caterer						Alejandro L...		Oct 17 - 18		Not Start...		Med					
Promotion:																	
✓ Design landing page 1						Nikki Hend...		Oct 7 - 11		Not Start...		High					
📄 Design ads						Jennifer Lu		Oct 7 - 11		Not Start...		Low					
📄 Reach out to influencers to help promote event						Nicole Kap...		Oct 7 - 11		Not Start...		Low					
📄 Send save the date 1						Blake Pham		Oct 14		Not Start...		High					

4. Notion

The screenshot displays the Roadmap application interface. At the top, there is a navigation bar with a menu icon, the title "Roadmap", and action links for "Share", "Updates", "Favorite", and a three-dot menu. Below the navigation bar, the main header features the "Roadmap" logo and a search bar. The main content area is a Kanban board titled "By Status" with three columns: "Not Started" (2 items), "In Progress" (8 items), and "Complete" (4 items). Each column contains task cards with details such as task name, assignees, priority, and sprint.

Not Started (2)

- Facebook Login**
Ben Lang, Slimberly Lim
Task
Sprint 24
- Evernote Import**
Shawn Sanchez
Task
Sprint 21, Sprint 22

In Progress (8)

- Performance Improvements**
Camille Ricketts, Chet Corcos
Epic
- Rewrite Query Caching Logic**
Brian Park
Task
Sprint 22, Sprint 23, Sprint 24
- Apple Login**
Shirley Miao, Ivan Zhao
Task
Sprint 20

Complete (4)

- CSV Import**
Brian Park
Task
Sprint 23
- Database Tuning**
Cory Etzkorn
Task
Sprint 21
- Trello Import**
Harrison Medoff, Sergey Surganov
Task

At the bottom left, there is a "+ New" button. At the bottom right, there is a circular help icon with a question mark.