Instant Project Management

So, you've taken the Managing Projects class from ESI. It sounded good, explained a lot of processes, introduced some tools that could be really helpful, but where do you start to apply what you've learned? This short guide lays out the things you can do right now to get rolling. If you need a hand, you can always contact the Project Management Office at 507-514-1095.

1.   Be Proactive

You do not have to wait for somebody to give you an assignment or even permission to start using the project management processes. When you are a project manager, it is your responsibility, more than anyone else's, to deliver that project within scope, on time, within budget, and with a high degree of quality.

2.   Charter a Course (Initiate)

If you do not receive one beforehand, write up a Project Charter and get your managers to buy in. The critical components of this charter are:
   ★ *Project Background*, which describes the approximate termini, scale of the project, risks, etc.;
   ★ *Project Objective*, which indicates what type of project this is (e.g., preservation only, safety improvement, complete streets); and
   ★ *Project Manager Authority*, which lists what authority you are given to make decisions regarding scope, budget, change, etc.

3.   Plan the Project (Plan)

You will utilize a lot of the project management tools during project planning. The idea is simple: get input, make and document decisions, and get buy in. There are nine steps to project planning that you will need to include in your Project Management Plan (PMP) that you will share with your management:

1.   *Scope*: Send out the Scoping Worksheets to the functional groups and communicate with other stakeholders to get information that may affect the scope, compile their input, hold scoping meetings to decide what to include and what not to include, and record decisions in a Scoping Report. It's wise at this point to make the best decision with the information available and note the possibility of a change in the risk register (see section 3.7). Use the Scoping Report to build a Work Breakdown Structure (WBS).

2. *Schedule*: Although the PPMS Coordinator will generate a schedule based on project attributes you provide, you will need to adjust it to fit your project. Sit down with the Coordinator and make sure the schedule represents all of the work packages from your WBS and that the logic is correct, the durations make sense, and the dates are accurate. Get buy in from the functional groups (especially regarding what needs to happen for them to do their jobs, what they need to provide to others, task durations, and possible adjustments to their workloads). Have the Coordinator save this schedule as a baseline.

3. *Cost Estimate*: Use your Scoping Report, in conjunction with the WBS to generate a cost estimate. Develop a base estimate; you will not need to add contingencies yet as you will be adding those later in response to risks. Record the costs on the Total Project Cost Estimating (TPCE) Form. Make sure the basis for the estimate is filed so that when changes are necessary, you do not have to start over from scratch. After adding contingency (see 3.7), finalize the TPCE and get an approved budget.

4. *Quality*: Decide what level of quality is necessary for the project and what methods you will use to check that quality at specified points during project development. Allow time in the schedule for these checks and any resulting revisions.

5. *Team*: Identify who will work on the project. If you do not have names yet, at least indicate which functional groups you will need to involve. Include Central Office functions. Obtain contacts, share the scope with them, and make them part of the team.

6. *Communications*: Identify the internal and external stakeholders. Determine how and when you will communicate with your team, management, and external partners. Involve your Public Affairs Coordinator (PAC). Write your communications plan down and follow it.

7. *Risk*: Decide what level of effort you need to put into risk management. Will you identify and manage risks alone, with the project team, or through a risk management workshop? Regardless of the level of effort, the steps are the same. First, identify risks to the project scope, schedule, cost, quality, and other less tangible concerns (e.g., public trust, quality of life). Input all of these risks into a Risk Register. Next, qualitatively determine which of these risks are the biggest concerns. After that, do some homework to estimate the probability and impact of these risks. Add contingency to the schedule and cost estimate based on these risks. Finally, identify responses to the risks that will lessen or eliminate their probability or impact.

8. *Procurement*: Determine if you will need contractors to perform any of the project work. If you do, specify the methods you will use to hire them. Be sure to account for them in the schedule and cost estimate.

9.   *Change*: Specify how you will manage changes to the scope, schedule, and budget as they occur throughout the project. Specifically call out who has authority to authorize changes of different scales and the process for approving them. Include a dispute resolution process.

The PMP is a handy one-stop shop to record the decisions you made during the project planning. You can scale the PMP to your specific project so that it best conveys your plan for project delivery. In addition to documenting the steps above, you will need to specify how you will revisit the plan in the future:

4.   Keep an Eye on Things (Monitor)

Once the project is underway, follow your plan. Be sure to do the following:
- ★ Check deliverables as they come in to verify that they meet the scope and quality requirements;
- ★ Check the schedule (at least monthly) to watch for negative float in the schedule;
- ★ Get a regular (e.g., monthly) printed report of the dollars that have been charged to the project;
- ★ Pay attention to conflicts between team members;
- ★ Ensure that team members, management, and external stakeholders are communicating and sharing information according to the plan; and
- ★ Keep your risk register up-to-date. Take it to every meeting, add or retire risks as necessary, update the status of mitigations, and modify contingencies.

5.   Take Action (Control)

When project performance deviates from the plan or a risk becomes a reality, take corrective action or enact contingency plans. If a component of the PMP needs to change (e.g., scope, schedule, budget), use the Project Change Form to analyze, approve, and communicate the change recognizing that a change in one constraint will affect the others. Update the corresponding documents (i.e. scope report, schedule, TPCE) as appropriate. Taking these steps will ensure that the project stays under control.

6.   Learn from Experience (Close)

As you complete a phase or project, clean up the files, close out the contracts, communicate any information that needs to continue into the next phase, and take some time with the project team to note lessons learned from the experience.