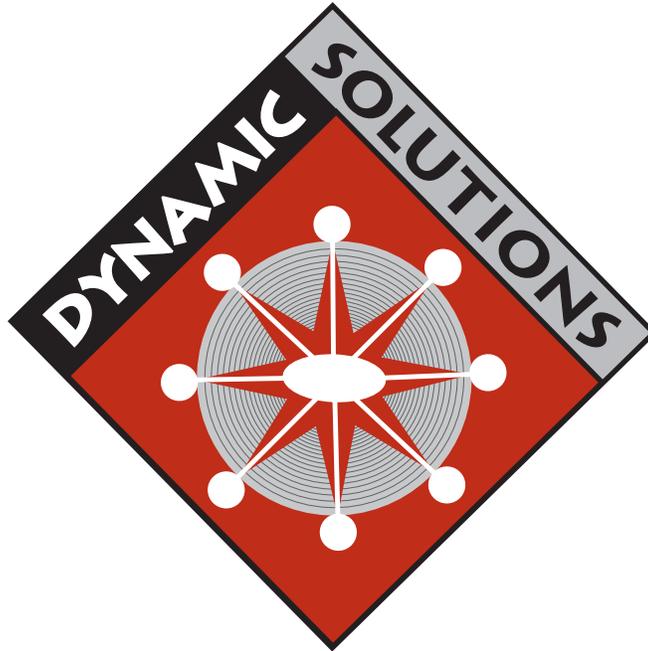


Welcome to
Project Team Member Essentials

Designed for
Sandia National Laboratories

Designed and Delivered by:
Dynamic Solutions
Albuquerque, New Mexico
Phone: 505.459.0436
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Project Team Member Essentials

Your Name

Your Trainer

Susan A. Junda

Course Date



About Susan Junda of Dynamic Solutions

MBA, PMP, Consultant, Facilitator, Trainer, Ontological Coach

Susan Junda is the President of Dynamic Solutions, a training, coaching and consulting company which helps companies better utilize their people to create extra-ordinary business results.

With over 20 years of service in facilitating teams from both the project management and team dynamic perspective, Susan's passion and forte is to assist others, whether individually or in teams, discover their true nature or purpose, transcend limited thinking and generate extraordinary possibilities for the future.

Susan travels nationally and internationally, consulting with and training clients in the areas of strategic planning, project management and team development. She has worked with over 500 teams, training them to use the tools of project management to develop viable project plans within the team environment. The focus of this work has been in research and development, engineering, IT, manufacturing, healthcare, biotechnology, and transportation/construction industries. She also works with groups to do strategic planning, organization culture change and team development.

When not working with clients, Susan is a seminar leader for the American Management Association, teaching public and on-site sessions in project management and team development. She is a certified facilitator of the *Team Spirit* program developed by Barry Heermann, Executive Director of the Expanded Learning Institute, of Trustworks® (a Ken Blanchard program) and is a graduate of Newfield Ontological Coach Training program.

Before starting Dynamic Solutions, Susan worked in commercial industry and government subcontract sectors for 17 years for corporations including Digital Equipment Corporation, Ford Aerospace & Communications and Lockheed Electronics. In her last 7 years in industry, she was a project manager in a hardware engineering and manufacturing new products environment, managing up to five cross-functional teams of people at a time.

Susan holds an MBA in Management and Organization Behavior from the University of Colorado and a B.S. in both Industrial Relations and Decision Science & Computers from Rider University, and holds the PMP designation (Project Management Professional) from the Project Management Institute, and is a member of the local PMI, ATD (Association of Talen Development), and ICF (International Coaching Federation) chapters. She currently resides in Albuquerque, New Mexico.

The facilitations, workshops and speaking engagements Susan delivers are dynamic and interactive as she incorporates many real life experiences into her material, not only from the corporate world, but from her personal life and learnings. She brings a passion to her work and creates a passion in others to grow and learn as well.

Project Team Member Essentials

Course Outline

Module 1 - Making the Transition from Functional Employee to Team Member

- Why the Need for Project Management and Project Teams?
- Key Definitions
- Benefits of Using Project Teams
- Reasons why Project Teams might not Succeed
- What Constitutes Project Success?
- Attributes of a Successful Project Team
- Making the Transition from Functional Employee to Project Team Member

Module 2 - Understanding Teams

- The Project Team Structure
- The Project Communications Triangle
- Assessing Team Behaviors
- The Stages of Team Development
- Successful Project Team Characteristics

Module 3 - Basic Project Management Concepts and Tools

- The Project Management Plan
- Basic Project Phases
- Project Life Cycle
- The Critical Triangle
- Project Management Plan Outline
- Project Management Tools to Create the Detailed Project Plan
- Project Team Members' Responsibility in the Planning Process

Project Team Member Essentials

Course Outline, *continued*

Module 4 - Skills for Getting Project Work Accomplished

- Accomplishing your Tasks
- Identify Time Wasters
- Managing Time
- Organize Yourself
- Dealing with Procrastination
- Managing Multiple Bosses
- Status Reporting
- Email Tips

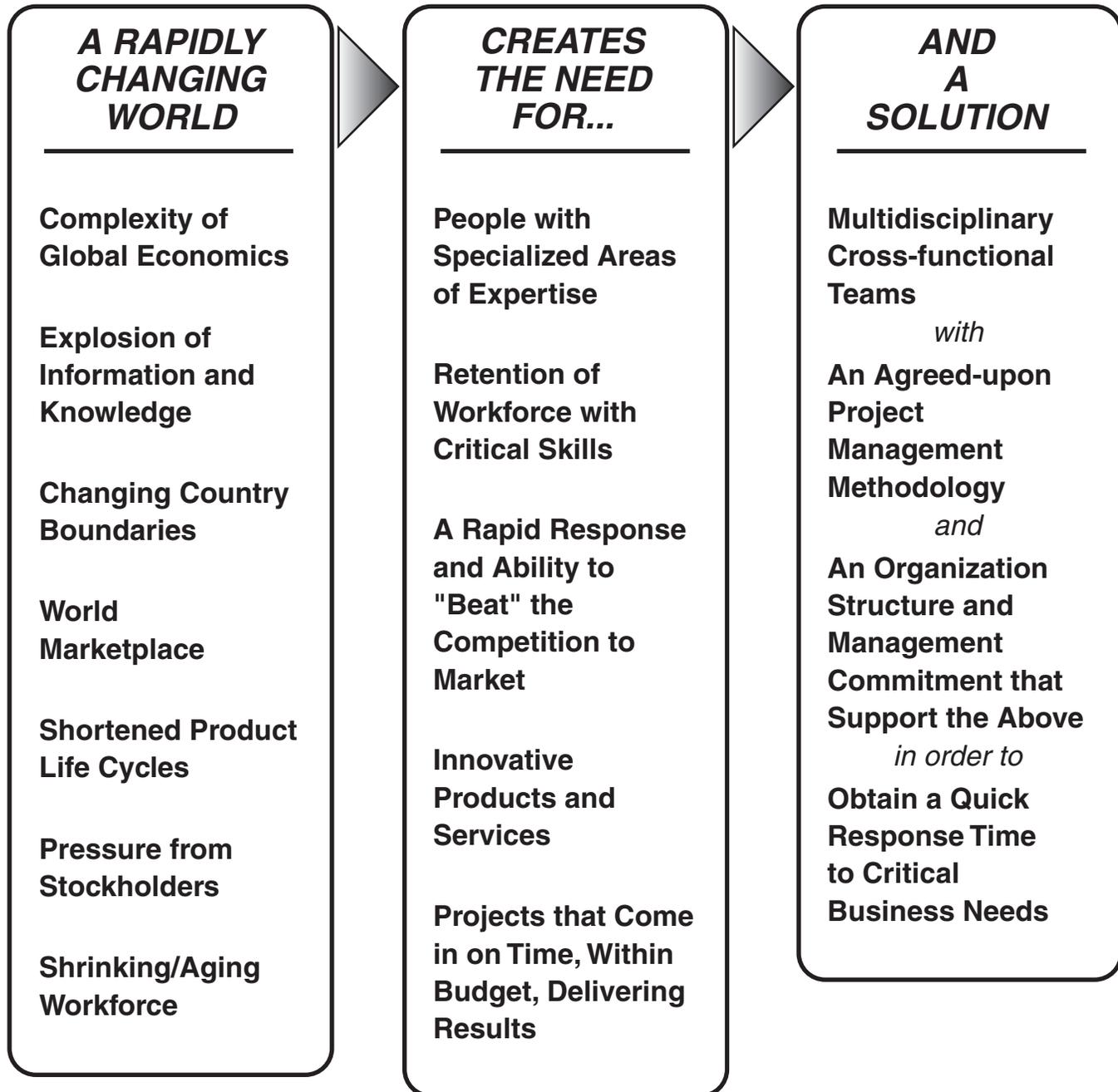
Module 5 - Summary and Wrapup

- What a Good Project Manager will do
- Dealing with Different Types of Project Managers
- What a Good Project Team Member will do
- WIIFY - What's in it for You?
- Action Planning

Module I

Making the Transition from Functional Employee to Project Team Member

Why the Need for Project Management and Project Teams?



Project Management Definitions

Project Management* is the application of knowledge, skills, tools and techniques to project activities and tasks in order to meet stakeholder needs and wants from a project.

This involves balancing the competing demands among:

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-

A **project*** is a temporary endeavor undertaken to create a new or improved product, service or result. Every project has a definite beginning, a definite end, and accomplishes an agreed-upon, specific goal.

Key characteristics of a project:

-
-
-

* The Guide to the **Project Management Body of Knowledge** (Sixth Edition PMBOK® Guide)
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A **process** is a series of actions or operations that proceed to an end result, but which is continuous in operation.

Key characteristics of a process:

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A **program*** is a group of projects and/or processes that are grouped together so as to obtain benefits that would not be available if they were managed separately.

Examples:

1. The “ABC Turbo Engine Program” consists of projects and processes to manage the current turbo engines but also those to develop the next generation of products.
2. Publishing a newspaper is a “program” -- getting the paper “out” is a process that is repeated over and over. The production of each day’s paper is a project.

NOTES:

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Benefits of Using Project Teams

What are the benefits of using Project Teams as a way of accomplishing work?

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Reasons Why Project Teams Might not Succeed

What are some of the reasons why Project Teams might not succeed?

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What Constitutes Project Success?

Bringing the Project in:

- On time
- Within budget
- At the proper performance, quality and/or specification level

With:

- Acceptance by the customer/client/user
- Minimum or mutually agreed upon scope changes

Without:

- Disturbing the main work flow of the organization
- Changing the corporate culture

When: *You can clearly and safely use the client's name as a reference!
Your client asks you to do more work for them!*

AND

HOW you work together as a team to accomplish the above counts too!!

Attributes of a Successful Project Team

What are some of the attributes of a successful Project Team? What do they need to do well together?

- Highest priority is to accomplish the project/team goals
- To support each other as equal members of the team
- To communicate openly and clearly with one another
-
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DEFINITION:

TEAM – a group of people doing something TOGETHER!

It doesn't matter what the "something" is...*how* they do it "together" is just as important as *what* they are doing!!

Time to Reflect...

What are some of the issues that you have experienced in making the transition from functional employee to Project Team member?

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What might be some possible solutions or actions you could take or have taken to alleviate the above issue(s)?

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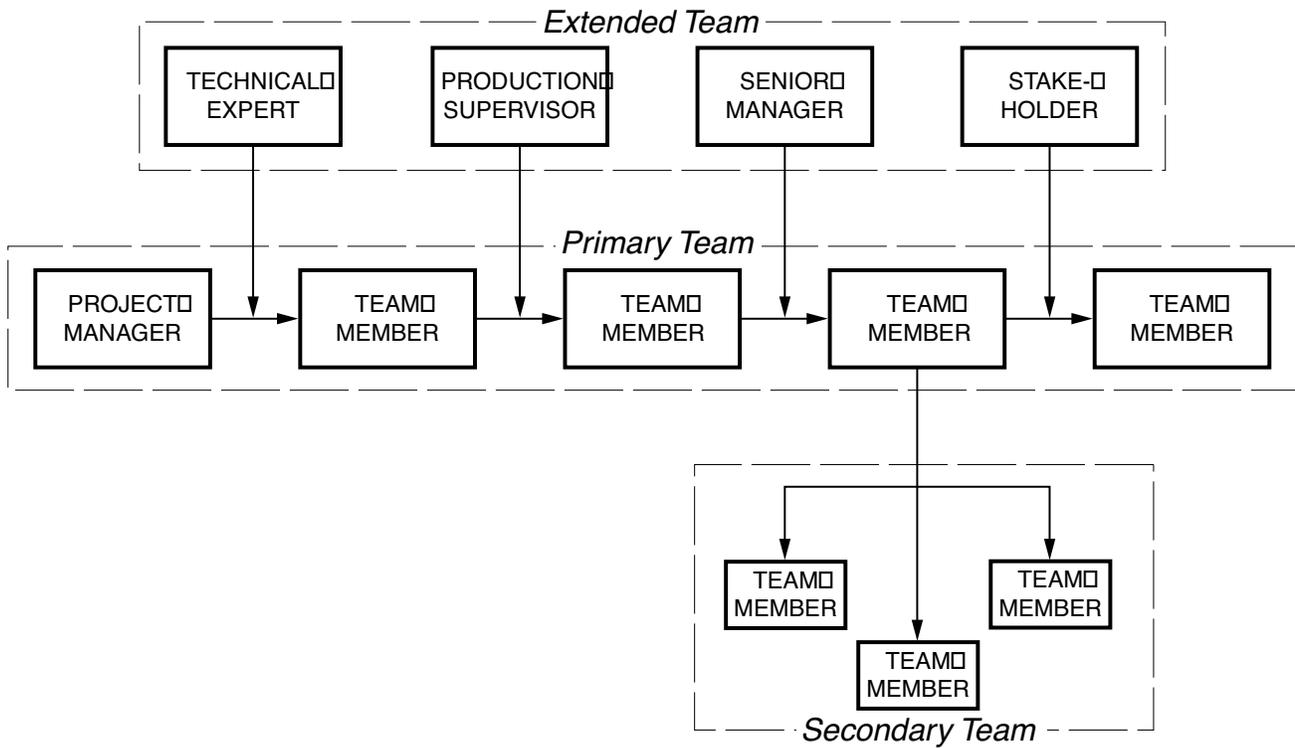
Making the Transition from Functional Employee to Project Team Member

Skills needed to be an effective functional employee	Skills needed to be an effective Project Team member
Ability to follow the rules of the operation/ department	Ability to be flexible and meet needs of the project
Allegiance is to pleasing the boss	Allegiance is to supporting the success of the project and the team with functional manager support
Be technically competent	Be the technical "expert" and functional representative
May need to communicate very infrequently to few people	Ability to communicate verbally, in writing and in person with all team members
Can ignore issues that create conflict	Need to address and resolve conflicts so that the project and the team can succeed
Receive feedback in reviews	Ability to give and receive constructive feedback regularly
Tendency to "play it safe"	Ability to assess and take risks
May work in a "vacuum" -- (just doing your own thing)	Must participate in the group process - i.e., brainstorming, developing options, problem solving, etc.
Decisions are "made above" and handed "down"	Decisions are made by consensus after all voices are heard
Rewards based on individual contribution	Rewards based on contribution to project, the group and peer recognition
Works on regular on-going tasks	Works on completing project tasks on time, within budget at a high quality level
Focus of work and time is spent on operational/ departmental work	Focus of work and time is balanced between the responsibility to operational work and the responsibility to the project

Module 2

Understanding Teams

The Project Team Structure



NOTES:

Primary teams

- Membership consists of between 4 and 12 team members.
- Team members devote at least 30% of their time to the project.
- Team members are “experts” in their specific skilled area.

Secondary teams

- Membership consists of between 2 and 12 team members.
- Team members devote 10%-100% of their time to the project.
- Team members “report” to a primary team member and are the “workers behind the scene”.

Extended teams

- These teams are extensions of a primary team.
- Team members participate in the project less than 10% of their time.
- Team member may have a specialized skill needed at some point in time during the project.
- Team members might include stakeholders, such as the project sponsor, a senior manager, or a senior technical advisor.

The Communications Triangle

Regardless of what kind of organization structure you are working in, there are 3 levels of communication that *must* happen in order to set up effective communications throughout the project planning phase -- and into the implementation phase. The levels of communication are as follows:

- 1) The first level is between the Project Manager and the team members.

The team members come to agreement, based on the work agreed upon in the Project Charter and the Detailed Project Plan, on who is going to do what task, when it will happen, and how long it will take.

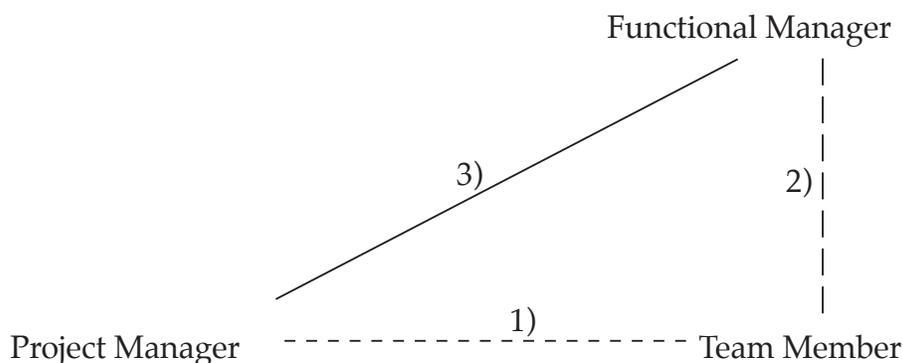
- 2) The second level of communication happens between the team members and their functional bosses.

Team members need to share with their bosses what they agreed to do on the project, when they will be needed and how long it will take. They also need to insure that what they agreed to do is in alignment with their personal development plan, that they have the correct skills for the job and that it meets with the functional manager's plans for them and their department.

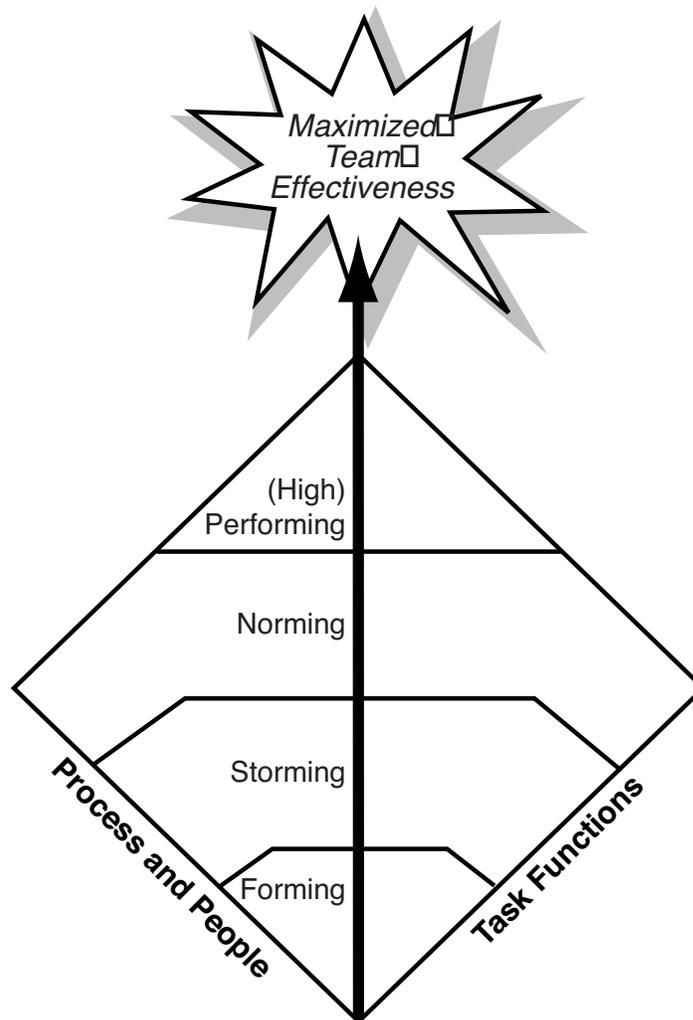
- 3) The third level of communication happens between the Project Manager and the functional managers of the team members.

This a critical and often overlooked step!!

Managers do *not* like to be surprised! It is the Project Manager's job to close the loop!!



Maximized Team Effectiveness



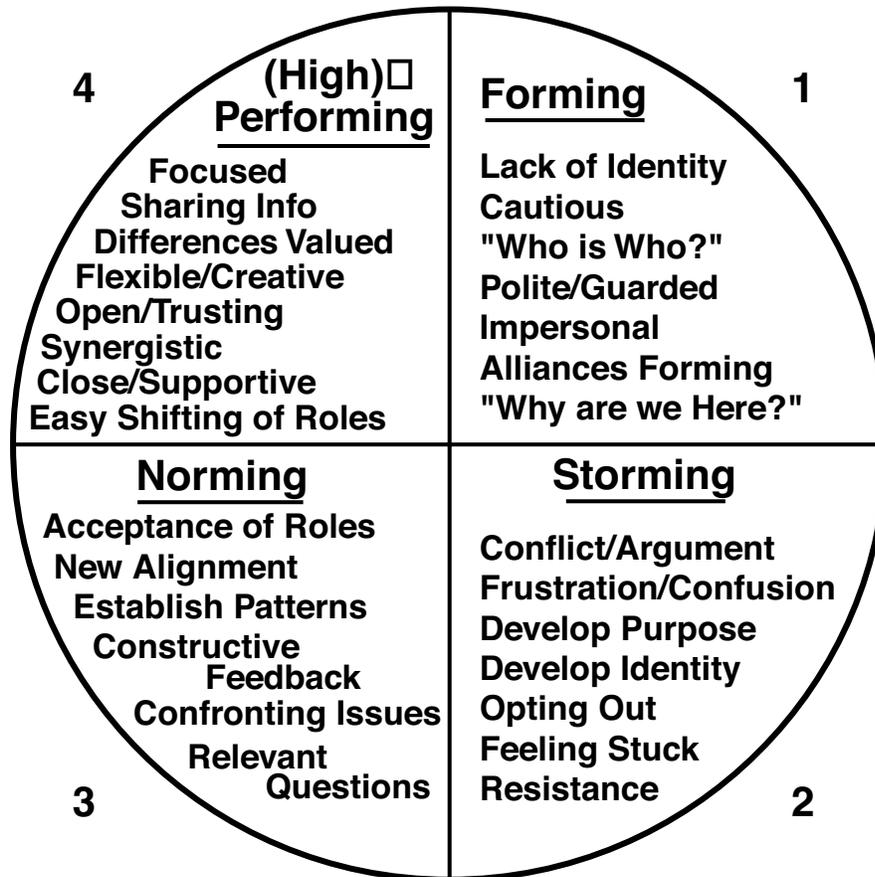
Remember that a team is a group of people doing *something* TOGETHER!!

Most Project Managers are in their position **either** because they are technical experts OR they work well with people to get things done.

If you are a Project Manager, look at your skill set. Which area do **you** need to develop? The management of the TEAM? Or the management of the TASKS?

If you are a Project Team member, consider this. If your Project Manager lacks in technical skills or people skills, a team member can help balance the dynamics of the team. For example, with a highly task-oriented leader, a team member might suggest charging money for being late for the meeting and later use it to take the team to a Social Hour event after work. This would promote relationship building with the team outside the work environment, despite a "work focused" Project Manager.

Stages of Team Development



- All teams, whether or not team members have worked together before, start out in the **Forming Stage**.
- All teams will move to the **Storming Stage** regardless of what type of leadership the Project Manager utilizes.
- The **Storming Stage** is of great benefit to the team. It brings issues to the surface to be resolved, which must be done before the team can move on.
- Most teams get to the **Norming Stage** and become productive. A few of these teams make it to the **(High) Performing Stage**.

Successful Project Team Characteristics

Every Project Team goes through cycles of good times and bad times. The duration of these times will vary for each team, depending upon how quickly they progress and work through the obstacles or problems. Project Team members should know that such cycles are normal and do not indicate whether the team will be ultimately successful. Below are some characteristics that, if Project Team members develop and utilize, will help the team move forward more quickly during the bad times and help ensure a greater chance of success.

- *Clarity of project goal and team purpose* – The best Project Teams work together to develop a clear understanding of goals and objectives, and come to agreement on what they are before beginning execution of the project.
- *Clearly-defined roles and responsibilities* – Effective utilization of Project Team members' talents and skills leads to a cohesive unit. It also leads to a better understanding of each individual team member's duties and contribution to the team, thus increasing the respect and valuing of each other as Project Team members.
- *Clear channels of communication* – Open and honest communication is required to realistically plan and efficiently execute the project. The team's dynamics are greatly enhanced when all Project Team members use sound communication practices.
- *Problem-solving and conflict resolution skills* – A successful Project Team will participate in the problem-solving of issues and resolve conflict in a healthy manner. Much is dependent upon the Project Manager to facilitate these discussions.
- *Constructive feedback methods* – Again, the best Project Teams have methods to give constructive feedback in order to communicate anger, frustration and disappointment in a way that does not destroy relationships. Instead, the air is cleared, the issue is resolved and the Project Team moves forward.
- *Sharing of some roles (administrative)* – It is not up to the Project Manager to perform all the administrative roles such as publishing the agenda, taking meeting minutes, publishing minutes, watching the clock, flipcharting brainstorming sessions. A Project Team might consider rotating these roles in order to build participation and commitment.

- *Well-defined decision procedures* – Most effective Project Teams decide by consensus, when possible, after having explored the important issues through a full evaluation of the available information. Consensus means everyone on the team supports the decision, even if they preferred an alternate course. All opinions are heard and valued.
- *Balanced participation at team meetings* – All Project Team members have a stake in the outcome and should participate in discussions and decisions. Domination by a few team members should be prevented. Team members can do this by soliciting the ideas and opinions of less vocal team members.
- *Awareness of the group process* – The Project Team should be aware of the group process, which includes understanding the way the team works together, along with paying attention to the content of the meeting. In general, Project Team members should be sensitive to nonverbal communication, recognize the group dynamics, intervene to correct a group process problem, and contribute to the group meeting content.

Bottom line is that all Project Team members are valued and respected for the skills and talents that they bring to the team. Project Team members demonstrate this through their behaviors and open, honest communication in their everyday interactions with each other.

Think of a Project Team you are on. How would you rate this team against these criteria? In what areas is the team doing well? What areas could use improvement?

Module 3

Basic Project Management Concepts and Tools

The Project Management Plan

Every Project Team must create a Project Management Plan for each project that they “own”. The Project Plan has two parts to it, as follows:

1. **The Project Charter** – Basically, this is a document developed by the Project Manager, preferably with the team’s involvement, that identifies what the project is about and what the work is that the team must accomplish.
2. **The Detailed Project Plan** – Once the Project Charter is approved, the Project Manager AND the team must develop the Detailed Project Plan which is a document that conveys HOW the team will accomplish previously agreed-upon project goal and objectives.

More detail will follow on The Project Management Plan after an overview of basic Project Management.

NOTES:

Basic Project Phases

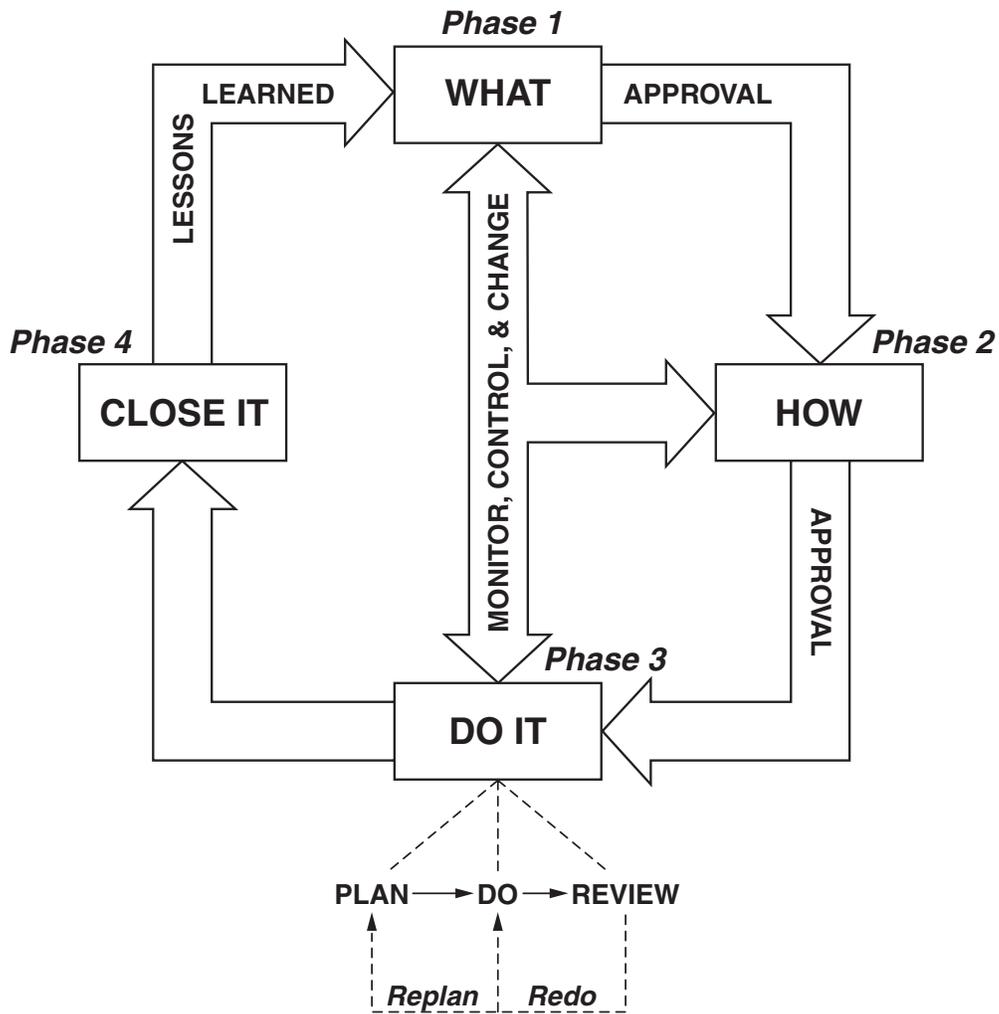
A project can be more easily managed if it is broken down into phases. Basically, the phases are a way to divide up the work into manageable segments, which align with the project life cycle phases. The phase approach to Project Management provides a way for the organization to manage projects *uniformly* and to track progress more accurately.

Four basic phases will be discussed, but realize that there can be anywhere from 3 to 9 phases and that the title of the phases can vary. If a business seeks to organize the work via Project Management, it will take time to accurately define the number and titles of the phases which will work in that specific environment.

There are four basic phases:

- The “WHAT” phase or Concept and Requirements Phase
- The “HOW” phase or the Organization and Development Phase
- The “DO IT” phase or the Execution and Control Phase
- The “CLOSE IT” phase or the Project Closeout Phase

NOTES:



Types of Projects

PROJECT	WORK	TECHNOLOGY	CHARACTERISTICS
1	Familiar	Familiar	Lots of "Knowns"
2	New	Familiar	Some "Knowns" & Some "Unknowns"
3	Familiar	New	
4	New	New	Mostly "Unknowns"

The Critical Triangle



FIND OUT WHAT MATTERS THE MOST!!

The qualifiers on the triangle are often referred to as the “triple constraints” of Project Management. Why? Because a Project Team is always trying to balance and *optimize* time, cost and quality. A team needs to know which one of these aspects is the *most critical* to their stakeholders (client, senior managers, etc.) so they can adjust the other two as necessary when doing their project planning or replanning.

The Project Management Plan Outline

One way to manage work by projects is to make it a requirement that every project create a Project Management Plan. This Plan consists of two parts: the Project Charter, which identifies “what” the project is about, and the Detailed Project Plan, which consists of “how” the project will accomplish its goal.

Project Charter

- Goal
- Objectives
- Project Scope
- Key Deliverables
- Assumptions and Constraints
- Team members and stakeholders
- Risk Assessment

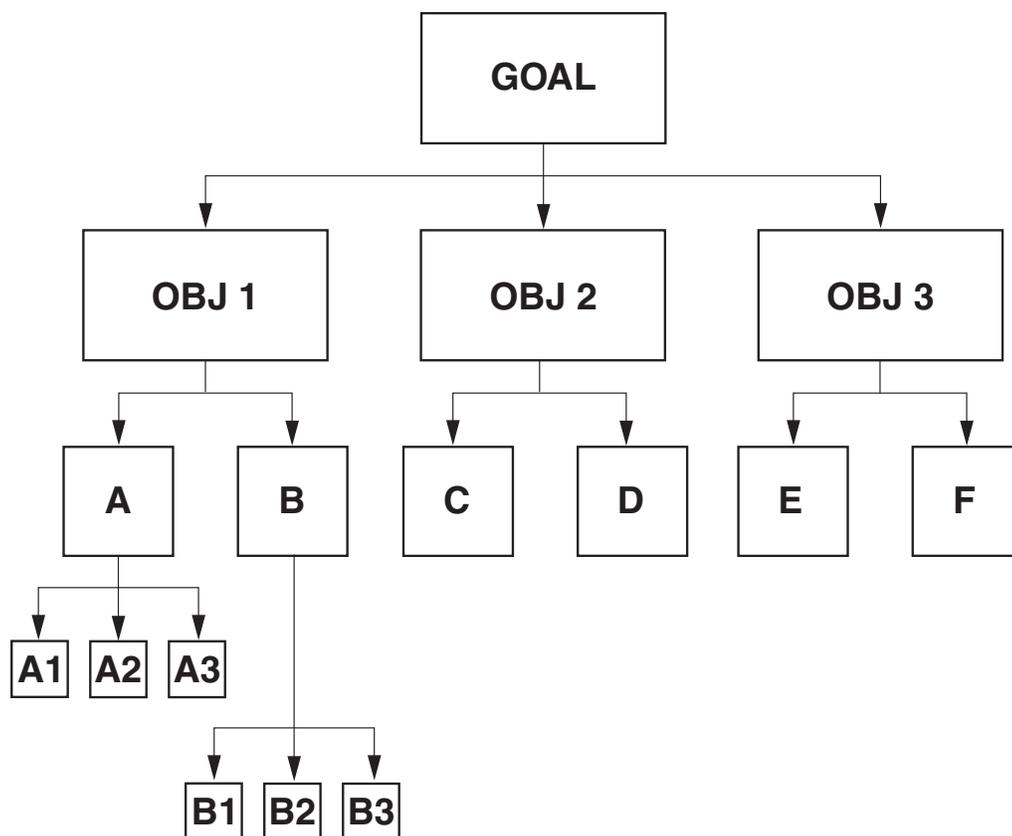
Detailed Project Plan

ISSUE	RESOLUTION
What are the tasks that need to be done?	Work Breakdown Structure (WBS)
In what order will the tasks be done?	Logic Network
Who will do each task?	Responsibility Assignment Matrix (RAM)
How long will each task take?	Estimate work and duration for tasks
What's the project schedule?	PERT Diagram/CPM/Gantt Chart
How many people are needed?	Resource Loading Charts
What is the project cost?	Calculate project budget
What's the best project plan?	Optimize time, cost and quality

Project Management Tools to Create the Detailed Project Plan

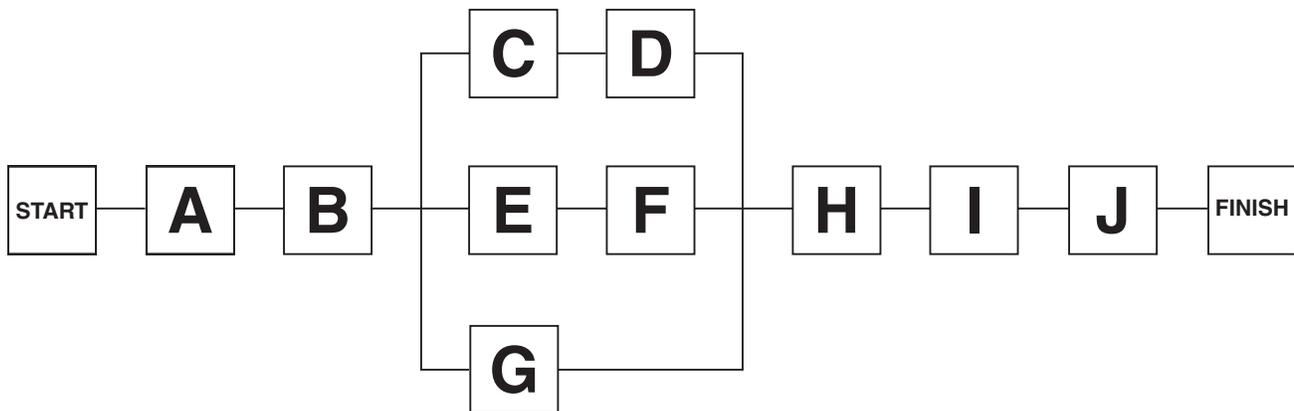
The Work Breakdown Structure

- The Work Breakdown Structure (WBS) answers the question “**What are the tasks that need to be done?**”
- The WBS is a hierarchical diagram that represents all the tasks that must be included in a project in order to ensure its successful completion.
- The WBS is the output of the process of “decomposing” the objectives created in the Project Charter into summary tasks and subtasks.
- “Decomposition” involves subdividing the major objectives into smaller, more manageable tasks and sub-tasks until they are defined in enough detail to effectively manage the work.
- Use only the lowest level tasks to create the upcoming Logic Network.



The Logic Network

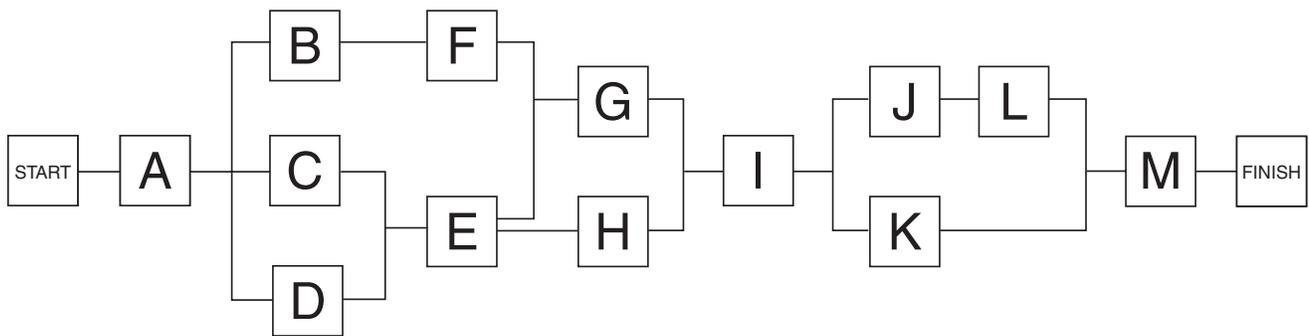
- The Logic Network answers the question “**In what order will the tasks be done?**” This is accomplished by rearranging the tasks in the WBS to create a “roadmap across time”.
- The Logic Network must have “start” and “finish” boxes.
- All tasks **MUST** be connected, with a line going into the *left* side of each box and a line coming out of the *right* side of each box.



Demo: Logic Network

<u>TASK</u>	<u>IMMEDIATE PREDECESSOR</u>
A	--
B	A
C	A
D	A
E	C, D
F	B
G	E, F
H	E
I	G, H
J	I
K	I
L	J
M	K, L

Demo: Logic Network Solution



The Responsibility Assignment Matrix

- The Responsibility Assignment Matrix (RAM) answers the question “Who will do each task?”.
- The RAM is an aid to determining the specific roles and responsibilities of each team member in relationship to each task (in the Logic Network).
- Benefits include:
 - Task Ownership is identified.
 - Deepens the team’s commitment to the project.
 - The completed RAM (including the Estimates) is the input sheet for Project Management software.
- Steps to completing the “who does what” portion of the RAM:
 - Label the Logic Network -- one letter or number for each task.
 - Fill in the RAM with Task IDs, Task Descriptions, Immediate Predecessors and Team Member Names.
 - *As a team*, have people sign up for the different tasks, using the legend system.
 - Insure there is one “Task Owner” for every task -- someone who will insure that the work gets done.

Estimating the Tasks

- Estimating the tasks answers the question “How long will each task take?”
- There are 2 types of estimates to make:
 - WORK or EFFORT estimate -- This is the billable hours or the amount of time it takes to do the actual work.
 - DURATION or ELAPSED TIME estimate -- This is the calendar duration from the start of the task to its completion.
- Agree on the use of a common standard for time (i.e., 1.0 = 1 week or 40 hours of work).
- **TIPS** for developing estimates:
 - For each estimate, consider:
 - √ “Knowns” versus “Unknowns”
 - √ Past history -- has it been done before?
 - √ Skill level of the person(s) doing the job
 - √ Degree of complexity
 - √ Number of people with whom to communicate
 - Consider that in an 8-hour work day, most people only do “real work” for 3 to 5 hours a day.
 - Let the person(s) who signed up to work on the task do the estimating of the “work estimate”.
 - Let all the people working on each task estimate the duration estimate together as a group.
 - Duration estimates *must* be at least as large as the largest work estimate for any given task. The exception is if a team member is estimating for work that a secondary team will do -- then the work estimate might be 6.0 with a duration of 3.0 because at least 2 people will be working on the task.
 - **REMEMBER:** Estimates must reflect the *realities* of the project!

The PERT Diagram/CPM

- PERT stands for **P**roject **E**valuation and **R**eview **T**echnique; CPM stands for **C**ritical **P**ath **M**ethod. Both were developed during the late 1950s to track time for projects involving concurrent activities and to monitor and control time expenditures.
- PERT/CPM answers the question **“What’s the project schedule?”**

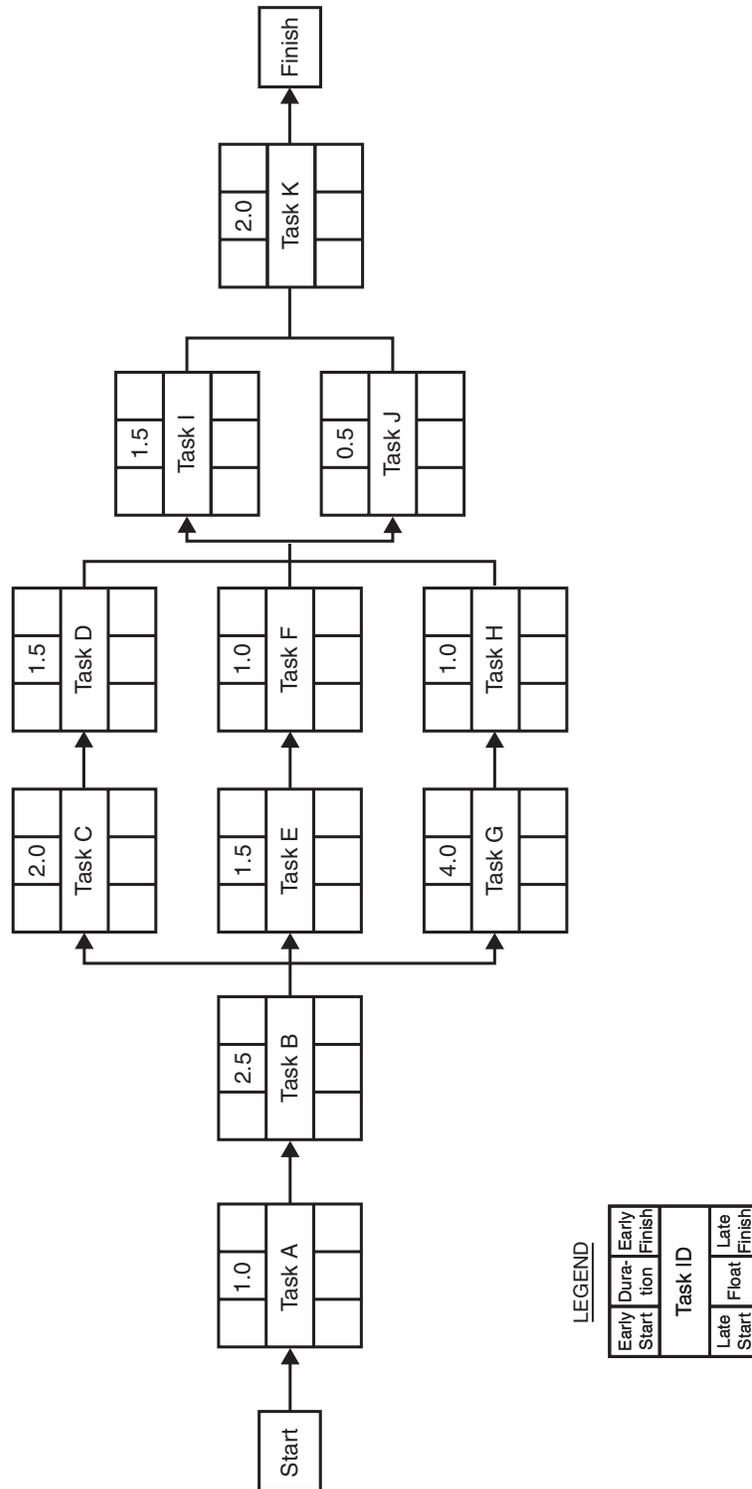
PERT - Schedule Development

This legend is used to represent actual jobs, tasks or work activities. You will fill in one for each task on the logic network.

Early Start (ES)	Duration (DUR)	Early Finish (EF)
Task Identification (Number)		
Late Start (LS)	Float	Late Finish (LF)

Data for each box is placed directly within the legend itself.

PERT - Diagram Example



Calculating Early Start, Early Finish (Forward Pass)

1. Enter the duration of each task (from the Resource Matrix sheet) onto a blank replica of the Logic Network (using the legend for each task).
2. Enter the early start (ES) and early finish (EF) dates for each task starting at the left (beginning) of the network and work forward to the right (end).

Use the formula: **Early Start (ES) + Duration (DUR) = Early Finish (EF).**

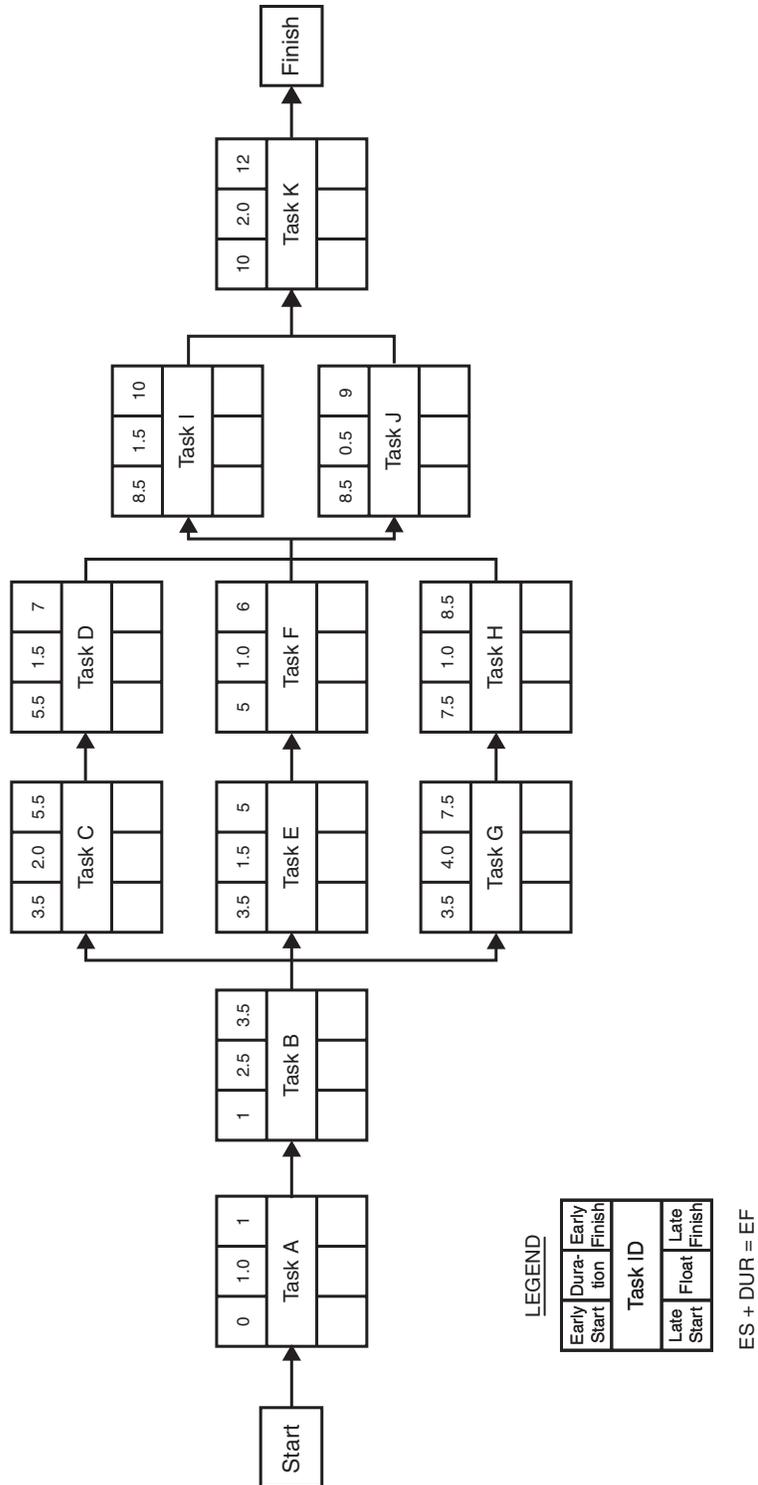
3. Assume that the earliest start (ES) for the first task is 0. If Task A takes 1 unit of time (duration), then the earliest that Task A can finish (EF) will be 1 unit of time from the start of the project (using the formula).
4. In this case, Task B follows Task A. The earliest it can start is when the preceding Task A is completed at 1. Therefore, Task B has an early start (ES) of 1, and because Task B takes 2.5 units of time, the earliest Task B can be finished is 1 plus 2.5, which is 3.5 (EF).
5. Continue on through the network, calculating early start (ES) and early finish (EF) times.

RULE: When moving from a serial task (or tasks) into parallel tasks, the first task in each “job stream” of parallel tasks has the same early start (ES) time. In the example, Task B has an early finish (EF) of 3.5, which gets copied into the early start (ES) boxes of Tasks C, E, and G.

RULE: When moving from parallel tasks (or “job streams”) into a serial task (or tasks), on a forward pass, the early start (ES) of the serial task is the *largest* early finish (EF) time of all its predecessor tasks. In the example, Task H has an early finish (EF) of 8.5, which gets copied into the early start (ES) boxes of Tasks I and J.

6. The early finish (EF) time in the last task of the network is the initial project completion time. In the example, Task K is the last task and its early finish (EF) is 12, which is then the initial project completion time.

PERT - Forward Pass



Calculating Late Start, Late Finish (Backward Pass)

1. To calculate the late start (LS) and late finish (LF), start work at the last task (on the far right side of the network) and work backward (right to left).
2. Copy the early finish (EF) time from the last task of the network into the late finish (LF) box of the last task. This is the only way to force the Critical Path to show up (which will happen soon -- be patient!). The early finish (EF) time in the example is 12, so the late finish (LF) time for the final task in the example is also 12.
3. To calculate the LS and LF for each task on the network, use the formula $LF - DUR = LS$, working from right to left through the network.
4. **RULE:** When moving in a backward pass from a serial task into parallel tasks, the first task in each "job stream" of parallel tasks has the same "late finish" time.

RULE: When moving from parallel tasks (or "job streams") into a serial task (or tasks), on a backward pass, the LF of the serial task is the *smallest* late finish time of all the preceding tasks.

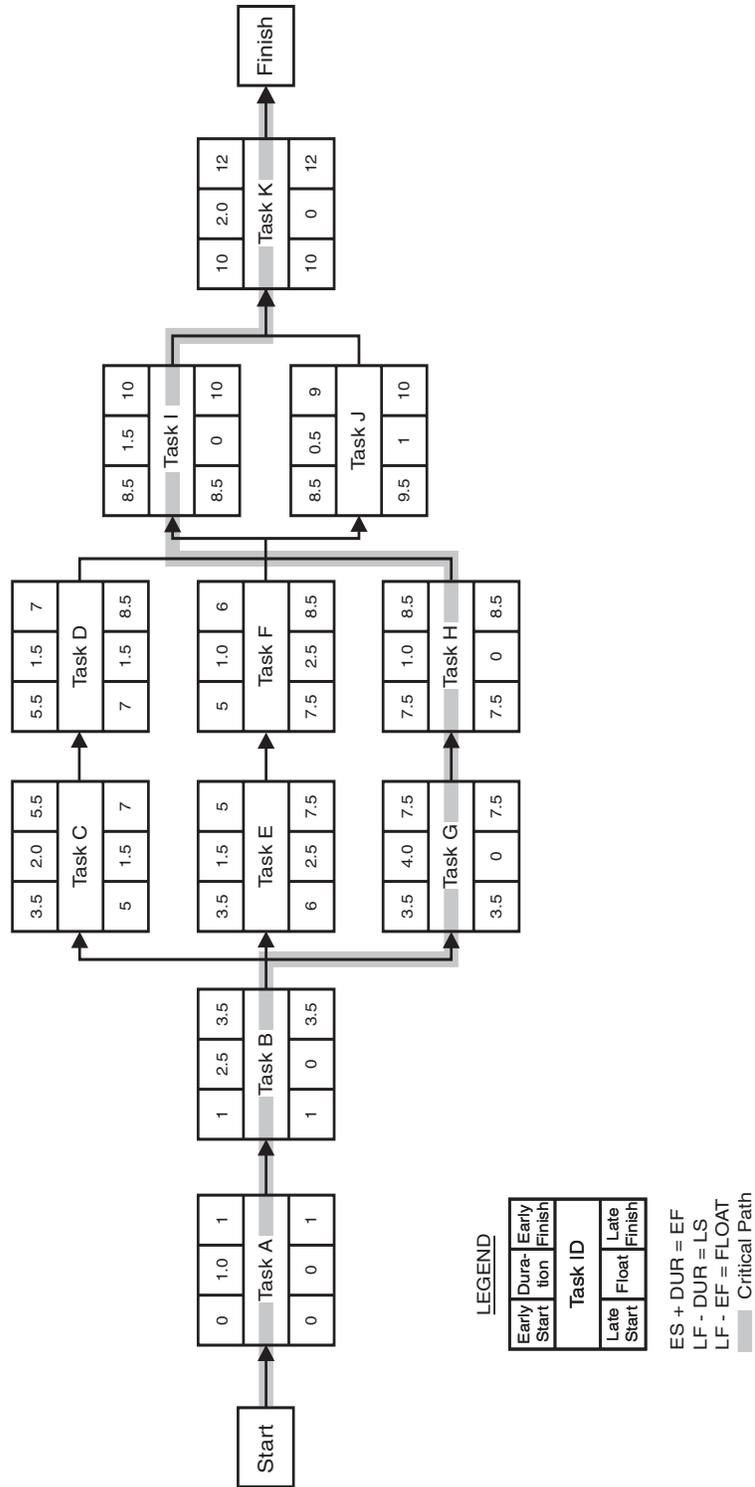
RULE: The LS for Task A (or any one of the first tasks out of the START box) *must* be a zero (0) or there is a mathematical calculation error in your network. Find it and fix it -- do **NOT** move on until you do!

Calculating the Critical Path

The Critical Path is the longest chain of dependent events through the PERT diagram. Any slip in the tasks along this path has the potential of delaying the project end date by the amount of the slip if no other action is taken.

1. Start any place in the network.
2. The formula to calculate Float is $LF - EF = \text{Float}$.
3. The Critical Path is when Float is equal to zero. Highlight the Critical Path through the network with a red line through the critical tasks.
4. Float (or slack) is the time that those who are working on the task can "slack off".
5. $\text{Float} + \text{Duration} = \text{Total time available to complete the task}$. If float is zero, there is NO time to waste!
6. **RULE:** Float is not cumulative within a job stream, i.e., the tasks in job stream "C-D" share the 1.5 units of float time.

PERT - Backward Pass and Critical Path

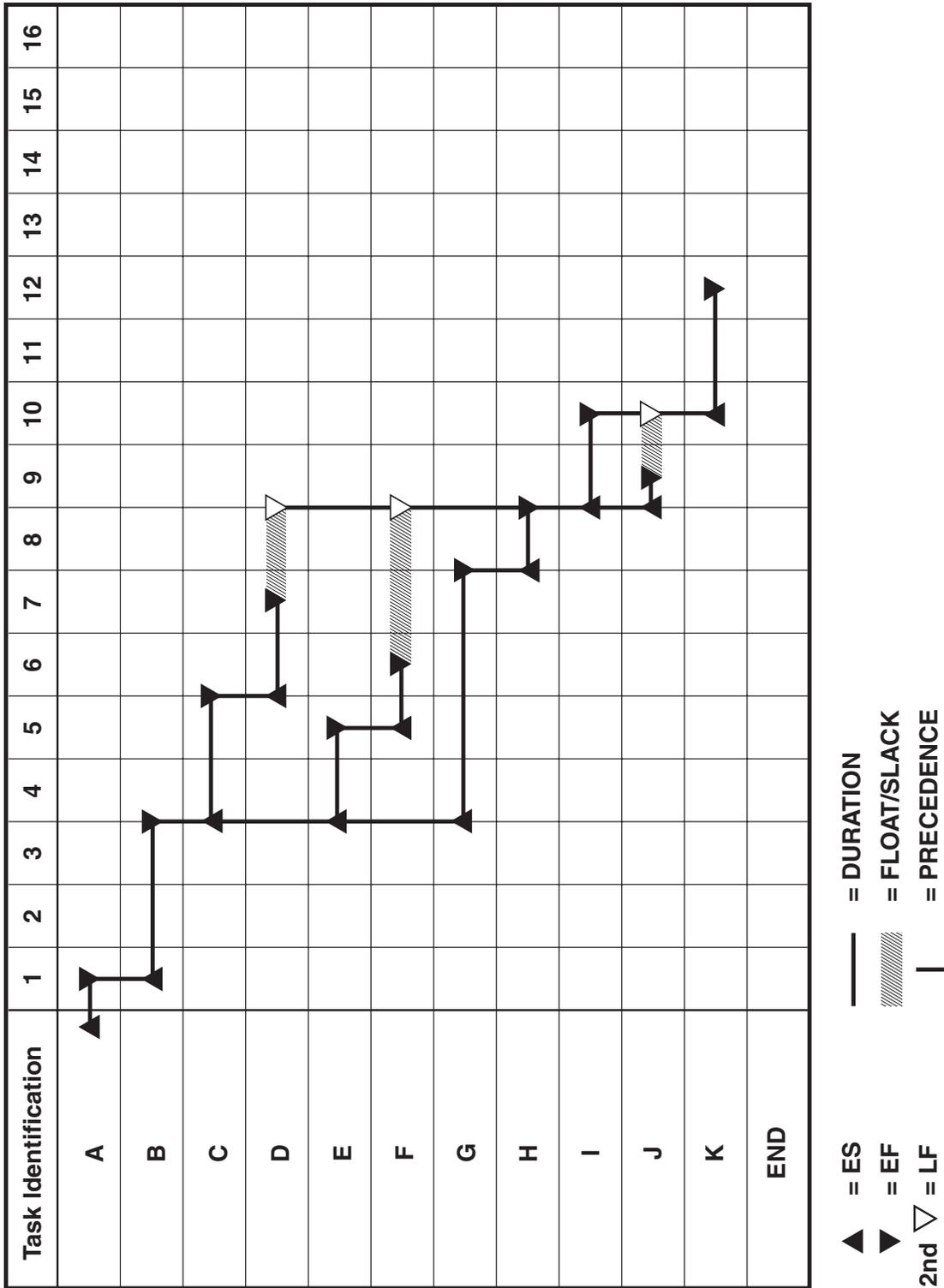


The Gantt Chart

- The Gantt Chart was developed by Henry Gantt during World War I to depict scheduling on the production floor of a ship building factory.
- The Gantt Chart is another way of depicting all the information given in the PERT diagram.
- Notice how the float for the job streams shows up at the *end* of the job stream -- and remember float is *not* cumulative in a job stream.
- Most Project Management software will generate a Gantt Chart, which is sometimes a preferred way to present information to senior management.

NOTES:

Gantt Chart Example



Project Team Members' Responsibility in the Project Planning Process

In the "old school" of Project Management, the Project Manager used to develop the project plan alone and hand it out to the team to execute. Some managers might even use this style today, especially since many now have Project Management software to "help" them, or they might just be used to being the "brains" on the team.

What are the benefits of using this approach?

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What are the risks of using this approach in today's world?

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What is a Project Team member's responsibility in the Project planning process?

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Benefits of Project Team Members Participating in the Project Planning Process

The “old style” of Project Management doesn’t work very well in today’s business environment. With change happening so rapidly, a Project Manager, no matter how good he or she is, just cannot think of every single thing that has to happen or that could happen. In addition, people basically do not like being told what to do; they’d rather play a part in figuring out what has to be done and how to do it. Astute Project Managers will get their Project Team members involved in the planning process as early on in the project as possible. They realize that this method is what optimizes the chance of experiencing the benefits listed below.

Benefits of Planning WITH the Project Team:

- *Brings hidden issues and assumptions about the project to the surface early on, thus minimizing missed tasks.*

The key words in the above statement are “early on”. One of the things that hinders a Project Team’s ability to bring the project in “on time, on budget while delivering expected results” is having unexpected tasks or hidden assumptions show up during execution of the project. Up front planning with all team members can bring out these tasks and assumptions early and minimize chaos later on down the road.

- *Helps the Project Team to recognize their functional dependencies early.*

Who do you depend on in order to be able to perform the task you signed up for? Who is waiting on you to deliver something to them so that they can do their job? Project planning with the team, through creating the logic precedence network, shows the team how the tasks they are performing are interrelated and makes the team agree on a “path” to follow.

- *Gains the Project Team members’ buy-in, commitment and “ownership” early on in the project.*

Bottom line, **participation equals commitment**. All Project Managers want a team that will do whatever it takes to bring the project in when they say they will. The Project Team commitment to doing whatever it takes starts right at the beginning planning stages of the project. People support what they create!

- *Teaches teams how to deal with conflict early.*

By virtue of going through the planning process together as a Project Team, conflicts will arise early on in the team’s process. This is good! It benefits the project to have the team members get clarity and come to agreement on the project plan before executing the project so as to minimize the problems (due to misconceptions and hidden assumptions) that can arise during execution. It also makes the team learn how to manage conflict in a constructive (rather than destructive) way.

- *Helps to establish a decision-making process early.*

Through the planning process, the Project Team will have to work through their differing opinions and sort through possible solutions in order to arrive at decisions that affect the content of their project plan. Project Teams that plan together learn when to use “majority rules”, how to come to consensus and when a decision just has to be imposed and followed.

- *Promotes relationship building and provides the opportunity for creativity.*

Spending the time it takes to plan the project together helps the team get to know each other early on in the process. They will get to understand what their colleagues really do for a living (when identifying tasks, signing up for the work and estimating time). If the project plan ends up coming out longer than the requested date, the team has the opportunity to get creative in figuring out how to balance the time, budget and resource needs while meeting the specific deliverables of the stakeholders.

- *Gets the entire team on the “right track” before taking action.*

In many arenas, Project Teams tend to “take off” and just go “do” what needs to be done without any plan in place. This often leads to missed tasks and to work having to be redone because it was never properly clarified. The beauty of creating the project plan together as a team is that the roadmap is created and agreed upon before any action is taken. Action starts out on the “right track”, which in turn utilized the company’s time, money and resources wisely.

- *Fosters the Project Team’s commitment to the project, the team process and each other.*

Project planning as a team builds up the commitment of each team member not only to the project plan, but to the team’s process and each other as Project Team members. The Project Implementation Plan is now “our” project and plan, not just the Project Manager’s!!

- *Creates the environment for the Project Team to experience synergism and develop the best Project Management Plan ever!*

Synergism is when the sum of the parts is greater than the whole, or when 2+2 is greater than 4. This occurs when the ideas, solutions and project plan developed is “greater than” what any one individual on the team could have done alone. The team now “owns” the project and will do whatever it takes to make it happen!

Without a doubt, Project Planning as a Team is the way to go!!

Module 4

Skills for Getting Project Work Accomplished

Accomplishing Your Tasks

Nine-tenths of wisdom consists in being wise in scheduling time.

- Theodore Roosevelt

Once the Project Management Plan has been approved, the Project Team's job is then to execute the project, i.e., start working on the tasks that need to be done. For team members with multiple project responsibilities, bosses that expect you to continue on at the same level with your departmental responsibilities and only 24 hours in a day, project execution can be the beginning of major stress and tons of work!

PROJECTS ARE TIME-DRIVEN!

It is every Project Team member's responsibility to:

- 1) Accomplish the tasks you signed up for:
 - On time and
 - To the agreed to "standard"
- 2) Notify the Project Manager if there are any problems in accomplishing the above.

This is when your time management skills and organizational skills can either support you or destroy you!

EXERCISE: On the next page, identify your 10 biggest time wasters, ranking them as you go – 1 for Number 1 time waster, 2 for Number 2, etc.

Identify Your Time Wasters

- Telephone calls _____
- Meetings _____
- Crisis situations _____
- Unclear communications _____
- Drop-in visitors _____
- Inability to say "No" _____
- Unclear responsibility for the tasks _____
- Lack of prioritizing the work _____
- Lack of clear deadlines _____
- Leaving tasks unfinished _____
- Doing too much at once _____
- Too much reading (Faxes, email, etc.) _____
- Lack of self-discipline _____
- Ineffective delegation _____
- Indecision and procrastination _____
- Perfectionism-need to do it perfectly _____
- Personal disorganization _____
- Untimely or unreliable information _____
- Other: _____

Managing Time

*Yesterday's time is a cancelled check.
Tomorrow's time is a promissory note.
Today's time is already cash...Use it!!
- Anonymous Philosopher*

The 80/20 Rule, or Pareto's Law, suggests that when there is a list of items (things to do, inventory to buy, customers to call), focusing on the top 20% of them will yield 80% of the value. Leave the majority of the other 80% of the list undone, because the value you will get from them will be significantly less than that of the highest value items (top 20%).

Notice the use of this law in our daily lives:

- 80% of eating out is done at 20% of favorite restaurants
- 80% of the laundry washing is done on 20% of the clothing
- 80% of sales come from 20% of the customers
- 80% of TV watching is spent on the 20% most popular shows

Again, it is important to remind yourself not to get bogged down with low-value activities but to focus on the 20% with the high value return.

EXERCISE:

1. Identify your top 2 time wasters.
2. With your group, decide which 2 time wasters cause the most problems amongst all of you.
3. Using the flipchart, for each time waster, identify 3 causes of the time waster and 3 solutions to eliminate/minimize the time waster.
4. Be prepared to present your output to the entire group.

Organize Yourself

Control of your hectic day starts with planning. Yes, it takes time to plan but planning also saves time and can allow more room for spontaneity and creativity, not less!

Planning and Organizing Tips

1) *Start and end each day with a plan.*

Everyone should have some type of organizer or day planner to help organize their day, even if it is just a to-do list (see example that follows). Time planning involves asking the following questions on a weekly and/or daily basis:

- What do I need to accomplish this day/week?
- What tasks do I need to do to accomplish this?
- What are the priorities?
- How much time will I need?
- When during the day/week will I do the work?

Make sure that the *first* thing that you do each day is to review your list. At the end of each day, update your list.

2) *Work at a steady pace.*

Be consistent, be patient, keep steadily at the task at hand. Focus fully on the job that is being accomplished now. More gets done this way, rather than using sudden bursts of extraordinary energy. Conserve your energy. People will find it a lot easier to work with you.

3) *Work on the right things at the right time.*

According to Parkinson's Law, work expands to fill the time available. People tend to slack off if there is no specific due date to meet. Ensure that your task list is current and that you are working on the right tasks at the right time.

Try going to the person you depend on for work and tell him or her "This is what I depend on you for." Go to the person that uses the results of your work and tell him or her "This is what I think you need from me." Most likely, discrepancies will surface. Work them, so you are working on the right tasks, and thus using your time more efficiently and productively.

4) *Get rid of clutter.*

Throw things away!! Don't let things pile up. Create file baskets and label them "In", "To Read", "To File". Don't let any stack get over an inch high without addressing it! Keep up with your mail and email. Getting behind can create disaster.

5) *Plan breaks and time for yourself.*

Plan breaks in the routine so you can work refreshed. Take at least 30 minutes daily just for you, to work on your personal objectives, to contemplate, to walk, to just do nothing.

MASTER "TO-DO" LIST

Date/Week of: _____

Calls to Make

-
-
-
-
-
-

Expected Return Calls

-
-
-
-
-
-

Things to Do

-
-
-
-
-
-
-
-
-
-

Computer Tasks (Email/Web Items)

-
-
-
-
-
-
-
-
-
-

Errands to Run

-
-
-
-
-
-

Code

X = Complete

√ = Call made; left message

* = Top priority (do today!)

Dealing with Procrastination

What's the opposite of time management? PROCRASTINATION!! People who procrastinate are those who cannot effectively manage their time. We all do this on occasion; it is a habit that we all share to one degree or another. Yet if not controlled, procrastination can create major stress and turmoil in your life. In certain cases, it can even affect those people around you.

What are some reasons why people procrastinate?

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People usually procrastinate to avoid something they *fear* or find *unappealing* or *stressful*. They might be avoiding one or both of these:

- Characteristics of the task itself – i.e., its complexity, difficulty, ambiguity, level of tedium
- Consequences of the task or responsibility – i.e., risk of failure or success, visibility, vulnerability, conflict, control level, criticism, perfectionism.

To overcome procrastination, behavior has to change. Behavior changes when the consequences of the behavior are analyzed and wise choices can then be made.

Consequences can be *positive* or *negative*.

Consequences can be *immediate* or *delayed*.

The Effects of Consequences

		CONSEQUENCES	
		Positive	Negative
TIMING	Immediate		
	Delayed		

EXAMPLE: Singing in front of a group

EXERCISE: Overcoming Procrastination

1. Jot down a task that you have been procrastinating about doing.
2. List the reasons why (characteristics or consequences) that motivate you to procrastinate.
3. List the “positive and/or negative” consequences (may be immediate or delayed) of procrastinating on this task.
4. List steps to take to change your behavior.

TASK I procrastinate in doing:

REASONS why I procrastinate on this task:

**POSSIBLE CONSEQUENCES of my procrastination
(positive and negative, immediate and delayed):**

ACTIONS I will take to overcome the procrastination:

Managing Multiple Bosses

One of the most challenging areas in being a Project Team member is managing multiples bosses. Not only is there a functional or department manager or supervisor to deal with but a Project Manager – or maybe many Project Managers, depending on how many teams you are on.

Answer this question: If a team member is having a problem completing the tasks on the project, due to lack of time, experience or knowledge, whose problem is this?

The team member's functional manager "owns" ensuring that he/she supplies the right person at the right time with the right skill level as team members to support the project. If a Project Team member is "overloaded", a conversation with the functional manager might be necessary. In some cases, the Project Manager who needs the team member's time and availability might attend this discussion.

What does the team member "own"?

Knowing when to say "STOP – I can't do it all!"

Most companies or bosses will take as much as you want to "give". (It's rare to find a boss that tells an employee she/he has too much work!) Given this, it is YOUR job to know when too much is too much and call a meeting with your boss and/or Project Manager.

Method of negotiating with your “bosses”:

1. Make a list of all the work that is on your plate.
2. Identify the due dates of the work.
3. Prioritize the list as you understand it.
4. Call a meeting to show your boss your workload and get feedback on your priorities.
5. *Together*, brainstorm possible options to managing the work on your plate – focus on the areas of:
 - a) Get help. (Be aware this might cost money.)
 - b) Take longer on some tasks.
 - c) Do less. Eliminate some tasks.
 - d) Lower quality and/or scope.
6. Come up with a mutual agreement regarding how to proceed. Be sure to test for understanding, document the agreement and make an action plan for implementation.

DO’S and DON’TS in negotiating with your boss:**DON’T:**

- Whine.
- Be impatient.
- Be late for the meeting.
- Make assumptions about the response of your boss.

DO:

- Behave in a professional manner.
- Expect a positive outcome.
- Be prepared with your documentation of the facts.
- Be willing to listen to your boss’s needs and viewpoint. Use your communication skills (open-ended questions, “I”-statements, paraphrasing).
- Get a clear understanding of the agreement made.
- Set a follow-up meeting to review progress against the agreement.

Status Reporting

Once the Project Management Plan has been approved by the stakeholders (i.e., the client and key managers), it is the job of the Project Manager to keep the project plan valid. The approved plan can be entered into Project Management software and “actuals” can then be compared against the plan.

The way in which the Project Manager monitors the project plan is through regular status reporting from Project Team members.

Status reporting involves the collecting and dissemination of performance information so that the stakeholders, Project Team and extended teams are informed regarding how the resources are being used to achieve the project goal and objectives.

Status reporting can include some, or all, of the following information:

- Where the project stands now against the baseline plan that was approved.
- What the team has accomplished
- A prediction of future project status and progress.

In general, the shared information focuses on the areas of scope, schedule, cost and quality.

There are three levels of Status Reporting:

- 1) From the team members to the Project Manager
- 2) From the Project Manager out to the team
- 3) From the Project Manager out to the “world”

We will focus primarily on the first level, the reporting of status from team members to the Project Manager.

Status Reports from the team members to the Project Manager

If you are on a Project Team and the Project Manager requests weekly status reports from each team member, what would your first response be?

Why?

No matter what the resistance to writing weekly status reports might be, the primary reasons they are “required” are:

- Weekly Status Reports from Project Team members help the Project Manager know whether the team is performing against the approved project plan.
- The Project Manager can assess if the team is ahead of schedule, on track, or behind schedule, which is his/her major job during Project Execution.
- Status reports help in keeping the project on track and keep the agreed-upon Project Implementation Plan valid!!

Status reports are NOT requested because the Project Team can't be trusted or because its team members have to be watched closely!!

TIPS:

- As a team, generate an agreed upon template of a status report to be used by all team members. If the team isn't required to report status, you as a team member can devise your own template to report your weekly status to the Project Manager.
- Before leaving work on Friday afternoon, each team member fills out a report on the system and sends it to the Project Manager.

SAMPLE TEAM MEMBER TO PROJECT MANAGER STATUS REPORT

Name _____
 Project _____
 Tasks (ID is okay) _____
 Department _____
 Month _____

	Week 4	Week 3	Week 2	Week 1	
# of Hours					Accomplishments
					Next Week's Work
					Comments/Issues

Benefits of submitting weekly Status Reports

- 1) Information from team members aids the Project Manager in keeping the Project Plan current and valid.
- 2) The Status Reports can serve as historical records on what events transpired during the course of the project.
- 3) The team members can use their Status Reports in reporting their accomplishments for their yearly performance reviews.
- 4) Team members will know how well they estimated their tasks. Their Status Report becomes a time management tool.
- 5) The Status Report written on Friday serves as a “to do” list for the next week’s work.

Once the Status Reports are received...

A good Project Manager will collect all Status Reports from the Project Team and then create a Summary Status Report. The information in this report should be a compilation of the information from the individual team member’s weekly reports, information gathered in weekly team meetings and any other information that the Project Manager has received that is pertinent to the project and to the team.

It is highly recommended that the Summary Status Report has a section dedicated to current Action Items that need to be accomplished in order to keep the project on schedule.

Action Item List:

Action	DRI*	Due Date
1. Investigate outside vendors to publish training manual Status: three out of 4 vendors contacted as of 5/27/XX	Bob R.	5/30/XX
2. Set up phase review meeting for 6/10/XX Status: Zia room acquired, meeting notice to go out by 5/15/XX.	Maria G.	6/10/XX

ETC.

*DRI = Direct Responsible Individual

It is the Project Team Member’s Responsibility to:

- Know if his/her name is on any Action Item in the Summary Status Report.
- Work on these Action Items.
- Be prepared to report on status of these Action Items at the next Project Team meeting.

E-mail Tips

E-mail is a major form of communication between Project Team members in many organizations. It's a wonderful tool, but like most tools, if misused, it can cause a multitude of problems.

Has anyone ever had an e-mail message misinterpreted?

Have you ever had an e-mail that you wrote forwarded to people that you never thought would see it?

What follows are some e-mail tips so that you don't get trapped into creating unnecessary misunderstandings with your communications.

DO:

- Send the message only to people who need to know.
- Avoid anger in the message.
- Be aware of the "CC: list" in received messages.
- Proofread messages before sending them.
- Use e-mail as a vehicle to communicate information.
- Blind copy people with caution.
- Use your opening lines to set the tone of the message.
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DON'T:

- Send out partial information and assume people know the rest.
- Discuss personal or sensitive issues.
- Overuse the exclamation point (use it for praise!)
- Use uppercase lettering excessively (it's taken for anger).
- Send e-mails as an avoidance of dealing with an issue in person.
- Use with unhealthy relationships or touchy issues (it's subject to misinterpretation).
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Module 5

Summary and Wrapup

What a Good Project Manager Will Do

Just as being a good Project Team member is an art and a science, so is being a good Project Manager. In many ways, the Project Team is only as good as the Project Manager and the people on the team. At a minimum, a good Project Manager will do the following:

1. Insist that senior management allow time for up-front project planning.

Yes, speed might be critical, but a good Project Manager will not allow the team to just start “doing” without a clear and agreed upon project plan.

2. Involve the team in the planning phase of the project.

Once again, the style of management where the Project Manager plans the project and then hands out the tasks and due dates to team member does absolutely nothing to build team commitment to the project. To build commitment, the team must participate in the planning process.

3. Use software as a tool, not as substitute for interaction with the team.

A good Project Manager will enter the agreed upon project plan into the computer and track status against this baseline. He/she will interact with the team, hold meetings and require status reports for updates.

4. Present honest assessments up front, to both the team and the stakeholders.

A good Project Manager will not over promise or over commit. He/she will push the team but not avoid the conflict that might ensue by giving honest assessments regarding project status to key stakeholders and senior management.

5. Be passionate about both the project and the team itself.

If the Project Manager is not excited about the project, the Project Team will sense that and productivity and morale will be affected. A good Project Manager is an advocate for the team, will go to bat for them, defend them, be honest with them and get his/her hands dirty when the climate calls for it.

6. Value each team member for the skills he/she brings to the table.

Each person on a Project Team is there for a reason and has necessary skills to make the project successful. A good Project Manager will trust each team member and allow him or her to contribute their skills and expertise to the project.

7. Continuously learn and improve his/her Project Management and leadership skills.

A good Project Manager will learn about how to project planning, scheduling and controlling. He/she will learn how to adjust his or her leadership style to the situation at hand and the people involved and continuously improve in the “people skill” areas.

Dealing with Different Types of Project Managers

Yes, there are as many different types of Project Managers as there are people. Below are some styles/situations that might arise and suggestions on how to deal with them.

If a Project Manager is ...	Suggestions
<ul style="list-style-type: none"> • Too detailed oriented <i>Impact:</i> Team members get “lazy” because the Project Manager is doing it all! 	<ul style="list-style-type: none"> • Tactfully, using good communication skill, let the Project Manager know how this behavior affects the team performance. • Become the “big picture” person, especially during team discussions.
<ul style="list-style-type: none"> • Not organized <i>Impact:</i> Team stays in the floundering and/or conflict mode and accomplishes little. 	<ul style="list-style-type: none"> • Insist that the Project Manager create a plan so that the team can be efficient. • Meet with the Project Manager and suggest his/her using project planning and controlling tools.
<ul style="list-style-type: none"> • Not detailed oriented; too “hands off” <i>Impact:</i> Missed tasks, lots of crises due not working the details, stressed team. 	<ul style="list-style-type: none"> • Have a one-on-one with the Project Manager and tell him/her what you need and the consequence of not getting it. • If the situation gets extreme, talk to either your manager or the project champion.
<ul style="list-style-type: none"> • Not a people person, just all “work” <i>Impact:</i> Team morale declines, performance is less effective, project is no fun. 	<ul style="list-style-type: none"> • Suggest at a team meeting that the team go out after work or out to lunch. • Think of ways to celebrate successes.

OTHERS...

What Good Project Team Members Will Do

During the Project Definition and Planning Phases:

- Take time to get to know fellow team members.
- Participate with the team in developing the Project Management Plan.
- Obtain their functional boss's approval as to their commitments on the project.
- Represent their functional area with professionalism.
- Contribute to the project within their area of expertise.
- Attend all planning meetings or send a representative if they cannot attend.

During the Project Execution and Closeout Phases:

- Keep the Project Manager and team informed as to the status of the tasks they are working on.
- Work diligently to accomplish the tasks they signed up to do, on time and to the agreed-upon standard.
- Write weekly Status Reports.
- Attend Project Team meetings and send a representative if they cannot attend.
- Give an honest assessment of "reality" regarding the status of their tasks.
- Call a meeting with their functional boss and/or Project Manager if there is too much work on their plate or if they need clarity on their priorities.
- Participate in "lessons learned" sessions when closing out a project.

Throughout the Project, to enhance the Project Team's process:

- Try to first understand, then be understood. ("Be quick to hear, slow to speak and slow to anger.")
- Make a conscious effort to make their teammates look and sound good to others, both inside and outside of the company.
- Contribute and be available to help in areas in which they have expertise.
- Listen to their teammates and be willing to learn from them.
- Always go to the person with whom they have an issue with first, instead of discussing it with others.
- If a teammate fails, they will do what they can to help him or her recover and learn from those failures in a way that he or she would appreciate being helped.
- They do what they commit to do and are willing to be held accountable for it.
- Respect teammates enough to be at team meetings and be on time.
- They will not withhold information from team members or the Project Manager.
- They actively offer constructive ideas and feedback, but when they disagree, they will defer to the Project Manager and the team and work just as actively to support those decisions.

WIIFY - What's in it for You?

Being a Project Team member, rather than an individual in a department with clear cut duties, can be a challenging endeavor. So, what's the payback? What's in it for you?

- You gain skills that you can take with you wherever you go – to another position or to another company.
- You can emphasize knowledge of Project Management process and tools, in addition to having participated on Project Teams, on your resume.
- You can emphasize the team skills (communication, conflict management, negotiation, team dynamics) on your resume.
- The team skills can enhance all of your relationships, both personal and professional.
- You gain experience creating something with a group and go through the stages of teaming.
- You can experience synergism with a team, where the results the team creates are better than any one person alone could have created.
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