



PROJECT TEAM MEMBER ESSENTIALS

Course Worksheets

Dynamic Solutions

Susan A. Junda

SJunda@DynamicSolutionsNM.com

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

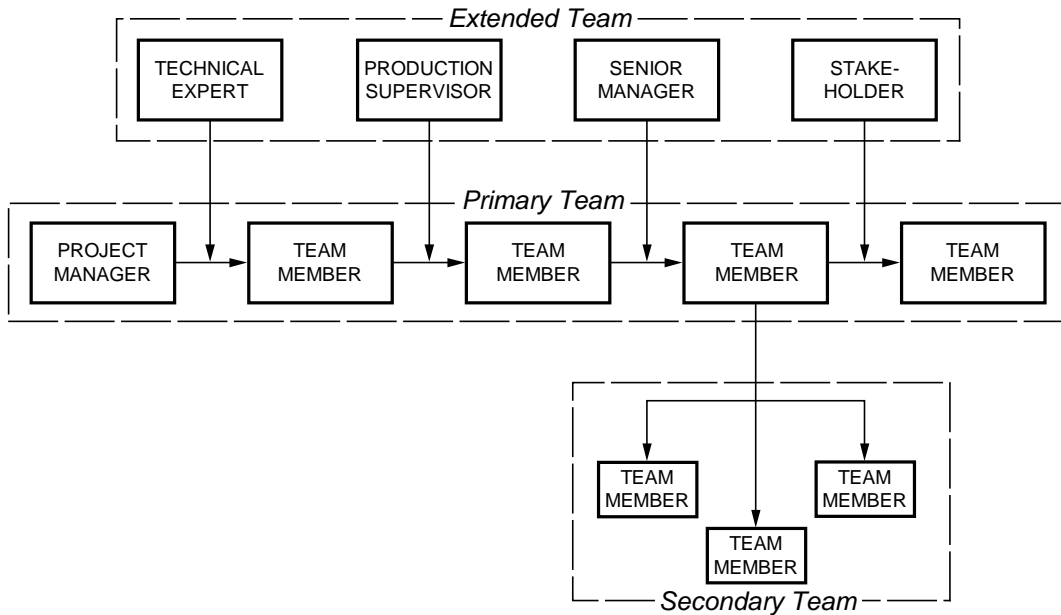
Works on completing project tasks on time, within budget at a high quality level

Focus of work and time is spent on operational/departmental work

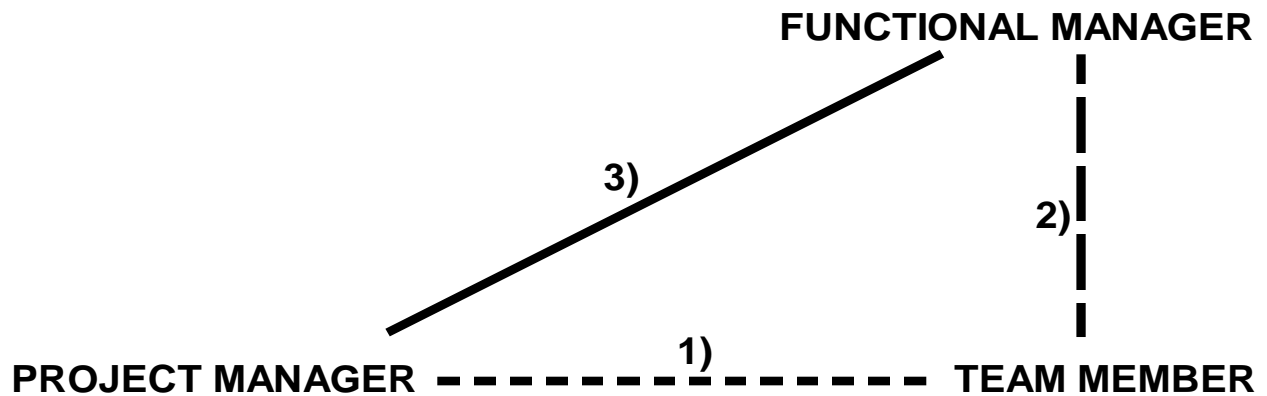
Focus of work and time is balanced between the responsibility to operational work and the responsibility to the project

MODULE 2 – Understanding Teams

The Structure of Teams



Communications Triangle



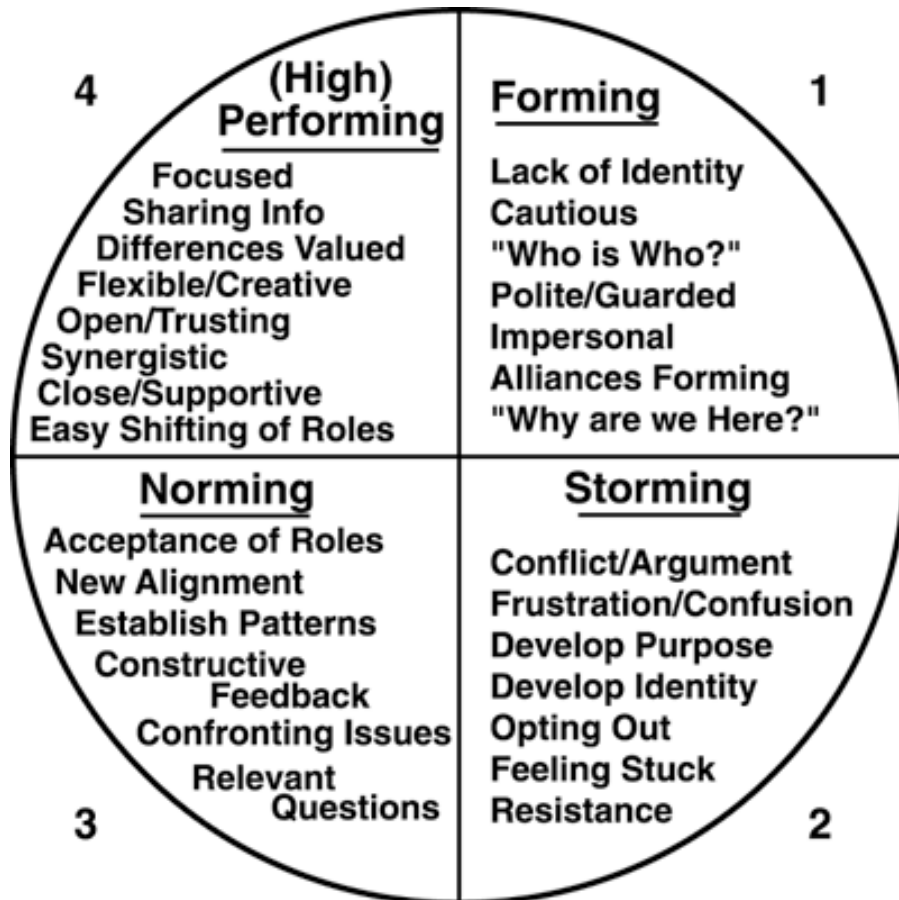
Assessing Team Behaviors

Best Team Behaviors:

Worst Team Behaviors:

New Team Behaviors	High Performing Team Behaviors

Team Stages



Managerial Styles:

- Task oriented
- People Person
- “Hands Off” Leader

What would cause a team to go “backwards”?

-
-

Successful Project Team Behaviors

EXERCISE: Rate your Team (think of the team at a meeting) on a scale of 1-5

5 = GREAT! We do this all of the time

4 = We do this most of the time

3 = We do this some of the time (50-50)

2 = We rarely do this; (maybe "should do it more often")

1 = I have never seen this exhibited by my team

The team I am assessing is: _____

RATING

1. Clarity of project goal and team purpose
2. Clearly defined roles and responsibilities
3. Clear channels of communication
4. Problem solving and conflict resolution skills
5. Constructive feedback methods
6. Sharing of some roles (administrative)
7. Well-defined decision procedures
8. Balanced participation at team meetings
9. Awareness of the group process

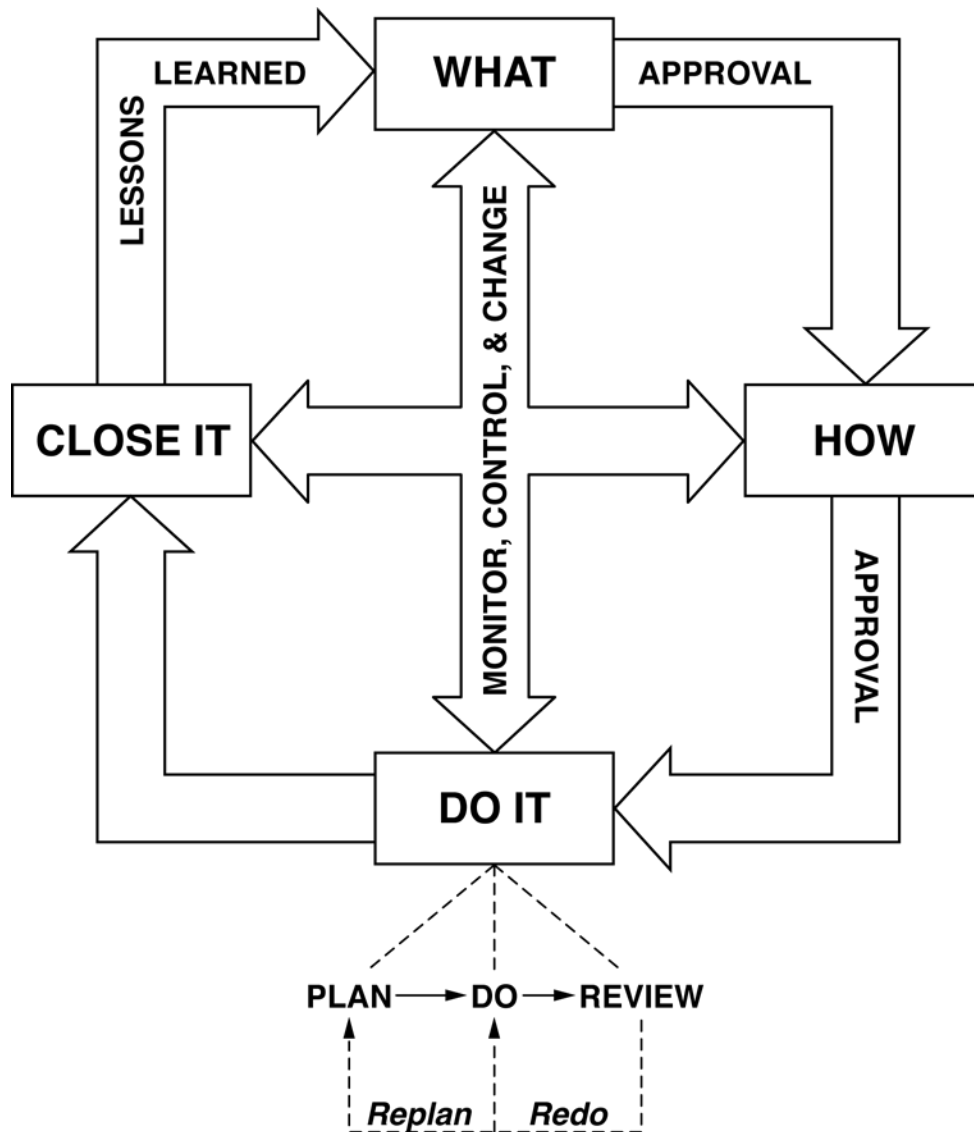
TOTAL: _____

Areas that the team is doing well:

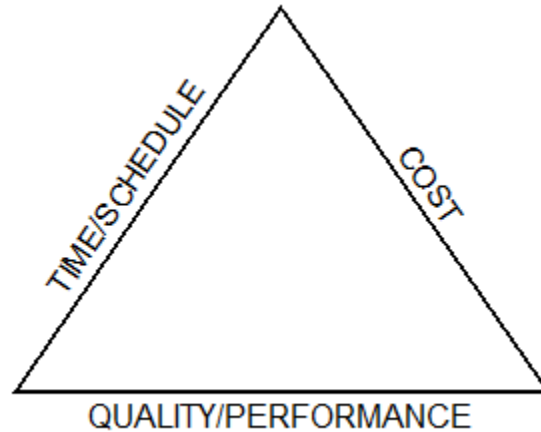
Areas in which the team could use improvement:

MODULE 3 – Basic Project Management Concepts & Tools

The Basic Project Life Cycle



The Critical Triangle



Project Charter Template

◆ Goal Statement

Two parts to the Goal Statement:

- What is the work that the team will accomplish?
- AND
- What is the endpoint signifying completion?

◆ “Action” Objectives

- Break Goal into 4-9 major objectives
- Each must start with a VERB!!
- Must include “doing it” AND the endpoint

◆ Key Deliverables - list what team will deliver

◆ Scope

- What is and what is not included
- Prevents “scope creep”

◆ Assumptions- Factors that for planning purposes are considered to be true, real or certain.

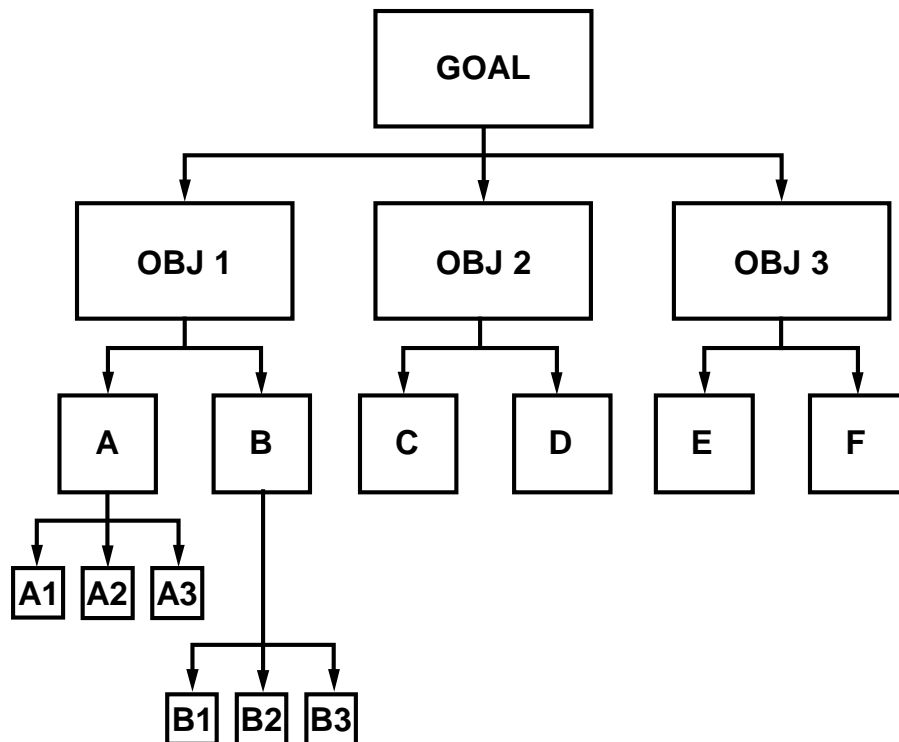
◆ Constraints- Facts that limit the project or the team’s options.

◆ Risk Assessment

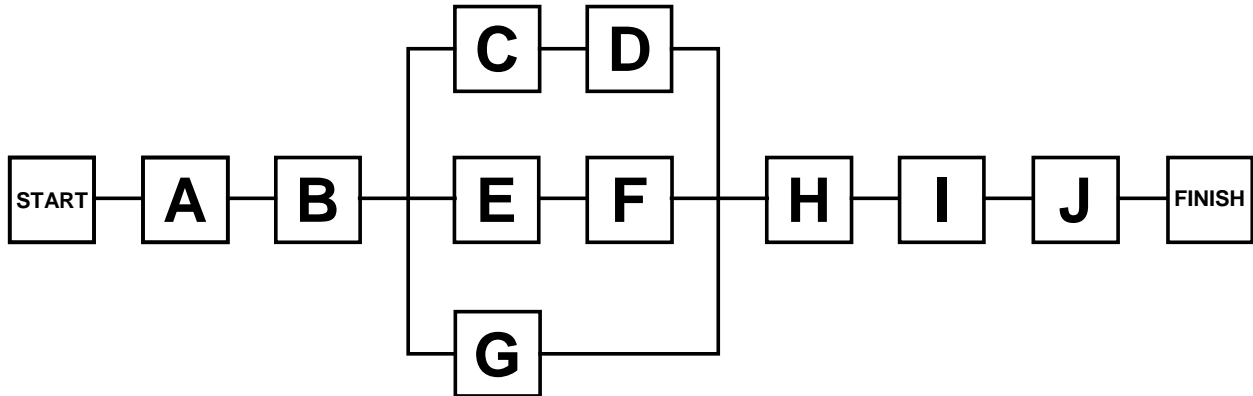
Detailed Project Plan (process/methodology)

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

Sample WBS



Sample Logic Network



Demo: The Logic Network

TASK	IMMEDIATE PREDECESSOR
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

Responsibility Assignment Matrix (RAM)

Task No.	Task Description	Imm. Predecessor(s)	Team Members						Total Effort	Duration
1										
2										
3										
4										
5										
6										
7										
8										
9										
10										

O = Task Owner I = Input
W = Work A = Approves

2 types of Estimates

Labor/work effort – goes into the BUDGET
Duration – goes into the SCHEDULE

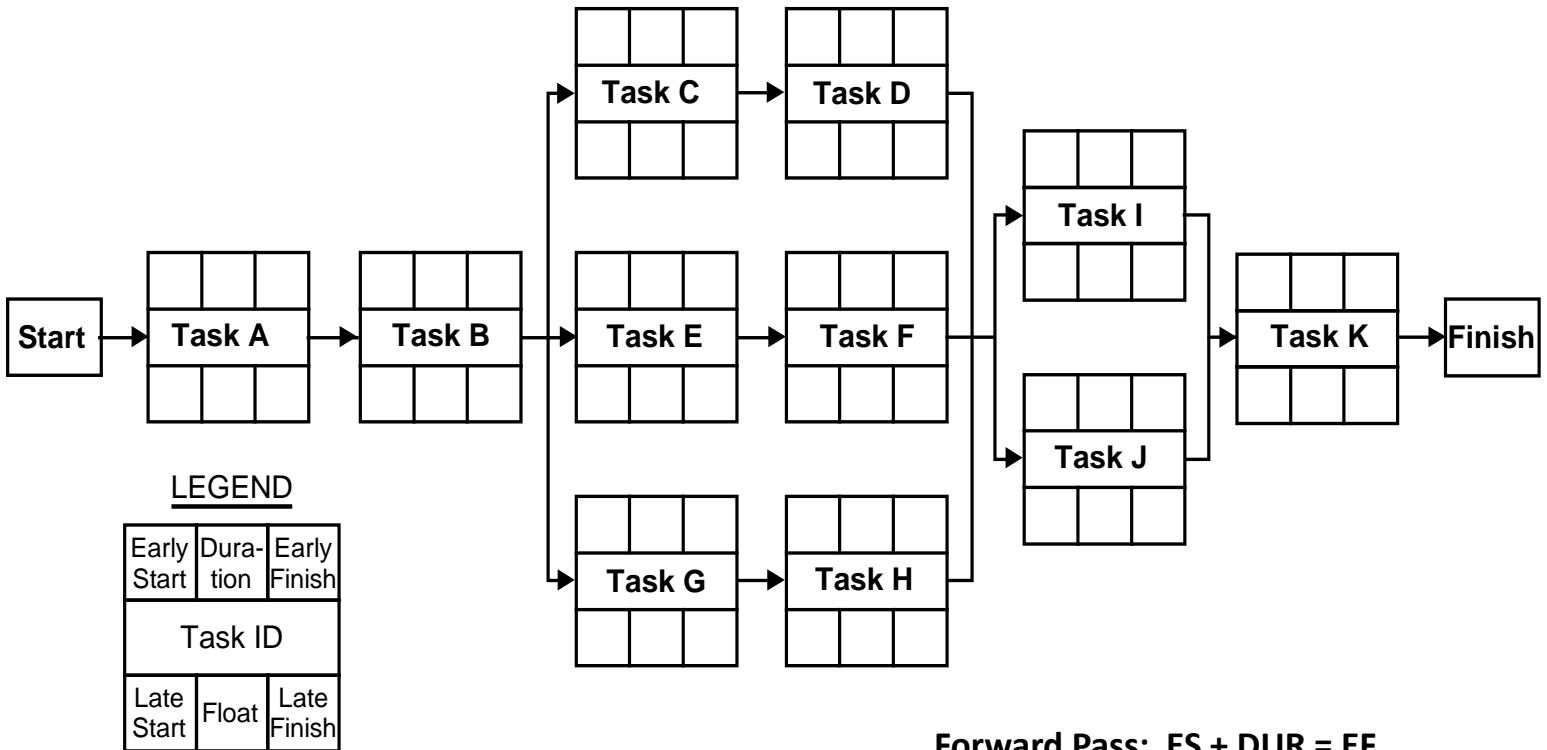
Estimating Standard

1.0 = 1 week/5 days/40 hours
.2 = 1 day/8hours
.1 = ½ day/4 hours

=====

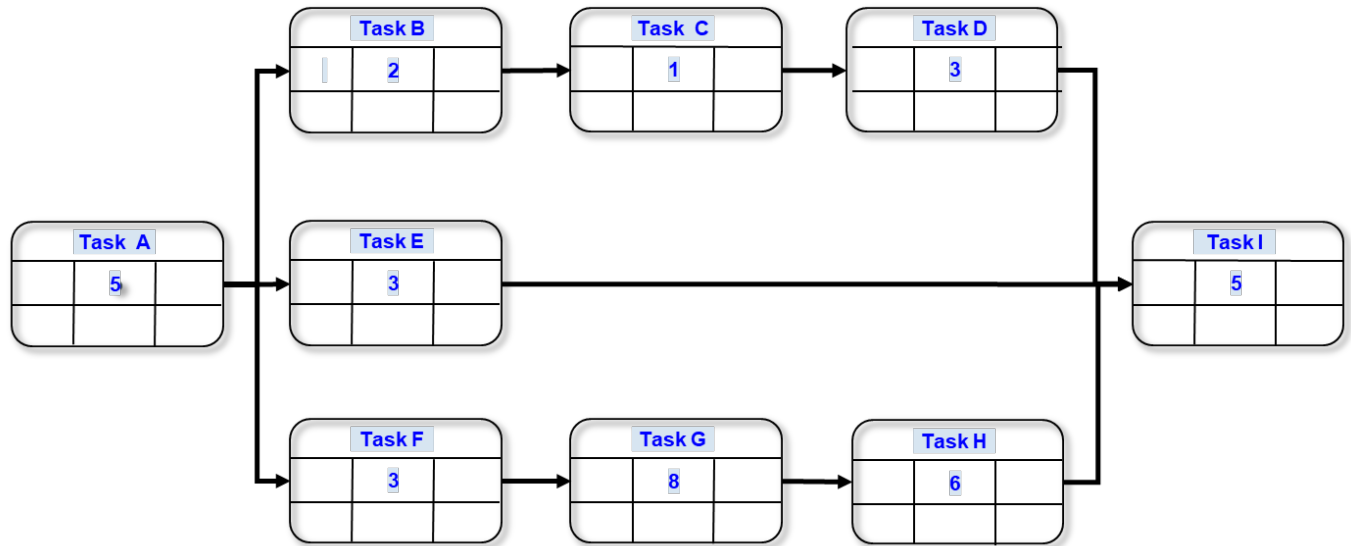
- Do NOT estimate less than .1
- Do NOT go to a second decimal point.
- Do NOT consider holidays, vacation or overtime.

Demo the PERT Diagram



Forward Pass: $ES + DUR = EF$
Backward Pass: $LF - DUR = LS$
Float = $LF - EF$

PRACTICE: Do the PERT diagramming



TaskID		
ES	DUR	EF
LS	FLOAT	LF

Forward Pass: $ES + DUR = EF$
Backward Pass: $LF - DUR = LS$
Float = $LF - EF$

EXERCISE:

- ◆ BO1 - What are the benefits of using the “old school” style of Project Management?
- ◆ BO2 - What are the risks of using the “old school” style of Project Management?
- ◆ BO3 - What is a Project Team member’s responsibility in the Project planning process?
- ◆ BO4 - What are the benefits of a Project Manager getting the team member’s involved in the project planning process?

MODULE 4 – Skills for Getting Project Work Accomplished

Identify Your Time Wasters

- Pick the top 10 (Rank them number 1-10)

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:_____	_____

- My top TWO time wasters are :
 -
 -

CONSEQUENCES

		Positive	Negative
T I M I N G	I m m e d I A T E		
	D e l a y e d		

EXERCISE: Overcoming Procrastination

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:

Status Reporting

3 levels:

- ◆ From the Team Members to the Project Manager

- ◆ From the Project Manager to the Team Members (Project Summary Report)

- ◆ From the Project Manager to Stakeholders

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) The Status Reports can act as a time management tool.
- 5) 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

A Case Study: The Team Member Caught in the “Middle”

You were recently assigned by your department manager, John Economy, to be a team member on the new product development team to work on the Starlight Project. Jim Ersfield, the department’s previous representative on this team, was reassigned to work on two other “hot” upcoming projects. The Starlight Project is ready to begin Phase 3, Project Execution. Mr. Economy told you that he sees you as being quite capable of representing the department with your functional area knowledge and expertise. He believes not only that you can handle this assignment, but also keep up with the responsibilities that you have been performing for the department. This is your first assignment to a Project Team.

Ms. Sophia Abrams is the Project Manager for the Starlight Project. While she welcomes you to the team, she is a “no excuses” type of manager and wants what she wants when she wants it. She is demanding and is not known for being easily approachable. Project Starlight is on the fast track, with aggressive timeline dates needing to be met.

Part 1 - As a team, answer the following questions and document them:

- 1. What additional information would be helpful for you to make the transition into your new position as a project team member?**
- 2. How would you go about gathering this information?**

Let’s continue...

Time moves on. The project is moving forward at a very rapid rate. You are juggling not only your department responsibilities, but your effort is now needed on the project is at 75% of your time. You are doing the best you can but are waiting on 2 other team members to give you some necessary information in order to complete your project tasks.

Mr. Economy has been pleased with your coming up the learning curve so rapidly, so pleased that he asks you to start attending 2 other project start-up meetings and help the teams to create their Project Management Plans. You say “yes” and now, one month later, wonder why you did.

Ms. Abrams has been leaving you voicemails and sending emails wondering where you are on your tasks and why you missed the last 2 team meetings. She sounds extremely irritated. Mr. Economy has been out of town for the last 2 weeks and will be back next Monday (“today” is Thursday), expecting some deliverables on his desk for some department policies and procedures you have been developing, which are still in rough draft. Bottom line, you are not sure how to handle all of this and wonder what you should do next.

Part 2 - As a team, answer the following questions and document them:

- 3. How do you think you should deal with Sophia Abrams? Mr. Economy?**
- 4. What would you plan to do the following week, given this situation? What order would you do it in and how would you prepare?**

Project Team Member – Action Planning

1. As a result of this training, what do I need to do when I go back to my job (within the next 2-3 days)? Within the next few weeks?
2. Who do I need to update, brief or educate?
3. What additional training might I or my colleagues or team members need?
4. As a result of this training, what do you recommend as “next steps” for Managers in your department to foster more project team “successes” (on time, within budget, delivering expected results in a quality way)?

Other courses from Dynamic Solutions:

- ◆ PMFund010 – Introduction to Project Management Terminology (3.5 hours)
- ◆ PMFund011 – Project Management Overview (3 days – uses the PMBOK)
- ◆ PMFund012 – Managing a Project from Start to Finish (3 days – experiential)
- ◆ PM151 – Project Leadership Essentials (2 day)
- ◆ PM152 – Project Team Member Essentials (2 day)

Contact info:

- ◆ **Project Management Institute**
 - **Phone: 610-356-4600**
 - **Website: www.pmi.org**
- ◆ **Susan Junda - Dynamic Solutions**
 - **Phone: 505-459-0436**
 - **Email: SJunda@DynamicSolutionsNM.com**
 - **www.DynamicSolutionsNM.com**

MOST IMPORTANT POINTS

Module 1:

Module 2:

Module 3:

Module 4:

Module 5: