



# Getting to the core Project Managing

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Rules of engagement – Be curious, be respectful, and be engaging

# Why Trey?

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- Received Project Management Professional (PMP) certification in December 2021
- 4+ years of project managing
- Share best practices and tools



## Discussion

What are you hoping to gain from today's session?

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# Objectives



Identify project model for your need  
(4 types)



How to create a Project Charter



Know how to make a Work breakdown  
structure



Know how to use RACI matrix

# Agenda

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- Introduction to Project Management
  - Definitions
  - 5 process Groups
- Initiating – Project Charter
- Planning
  - 4 project models
  - Work Breakdown Structure
  - RACI Matrix
- Activity
- Q/A





# Introduction to Project Managing






# Importance of Project Management Practices

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“Organizations that undervalue project management as a strategic competency for driving change report an average of 67 percent more of their projects failing outright.”

PMI (2020). Ahead of the Curve: Forging a Future-Focused Culture. *Pulse of the Profession*.

# Terms & Terminology

Item	Definition	True/False
Project Manager	an individual that oversees the project. Individual use project managing tools and methodology to manage the project.	
Project Sponsor	The individual that receives the project's end result(s).	
Stakeholder	A party with an interest in the project and may be affected by the project	
Scope	The work required to meet project's deliverable	
Risk	Future uncertainty that negatively impacts the project	



# Ask the crowd: What is a Project?

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A temporary endeavor to create a unique product, service, or result.









Defined Start and End date.

## **Not to be confused with an operation**

- Ongoing, repetitive, and does not add a unique value to the business.
- E.g. accounting function

# Compare the Difference

	Project	Operation
Submit milestone scores to ACGME		
Routinely monitor trainee hour compliance		
Create pamphlets for graduation ceremony 2022		
Creating a guidebook for trainee PTO request		
Processing trainee PTO requests		
Applying for Expansion & Funding for March 2022		



# The 5 process of project managing

# The 5 process



**Initiating** – Start of the Project



**Planning** – Planning & designing the Project



**Executing** – Carrying out the planned activities



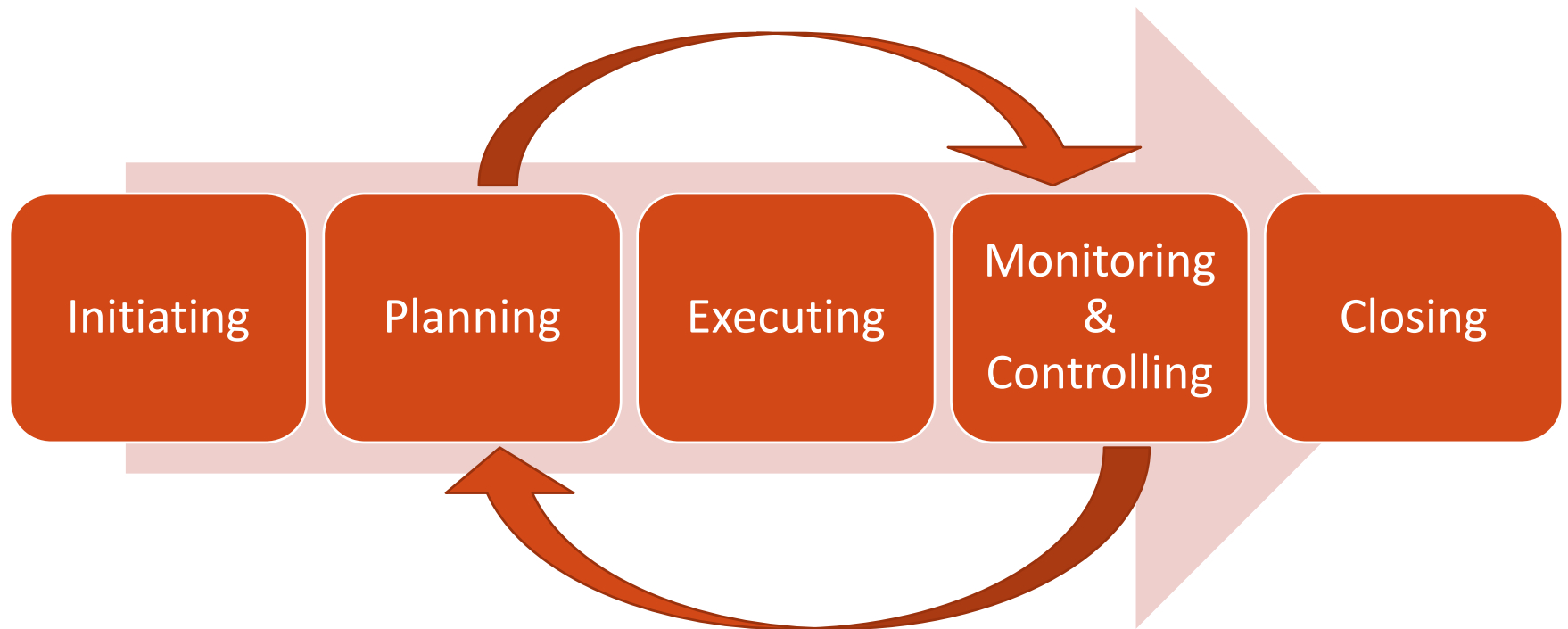
**Monitoring & Controlling** – Determine whether activities are meeting the deliverables & adjust



**Closing** – formally end the project

# The 5 process phase

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# Time to digest

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WHAT QUESTION DID YOU HAVE?

WHAT DO YOU THINK IS ONE OF THE BIGGEST CHALLENGE IN  
PROJECT MANAGING?



# A Project's beginning – Initiation Phase

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- Exploring a potential project idea and its feasibility & benefit
- Answering a problem
- Providing a service
- Creating a product
- Creating business value
- **You make a Project Charter**



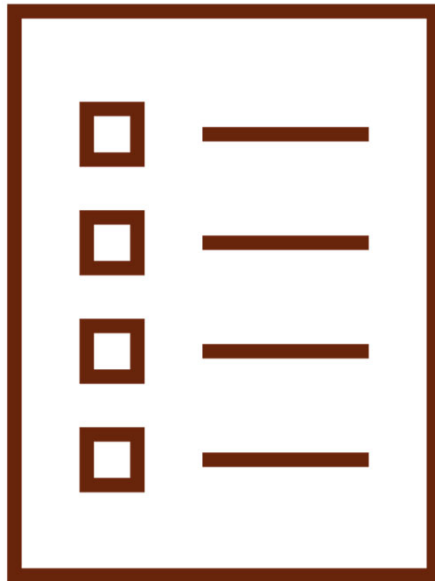
Initiating

Planning

Executing

Monitoring & Controlling

Closing



# Project Charter

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Formal document that authorizes project team to execute project activities. A “Project summary” document that contains critical information for project planning.

- Identify stakeholder
- Outline Requirements/Deliverables
- Schedule summary
- and other details needed to execute project.



Opportunity		Core Team Members		Stakeholders	
Currently, the website is unoptimized for mobile.		Name	Role	Name	Role
<b>Goal</b>		John Smith	Project Manager	John Doe	CEO
Redesign the website so it's more responsive and makes it easier to place orders on mobile devices.		Jane Smith	Designer	Jane Doe	Sponsor
<b>Objectives</b>		Johnny Smith	Developer		
<ul style="list-style-type: none"> <li>• Increase customer satisfaction</li> <li>• Increase purchase completions on mobile</li> <li>• Improve user experience</li> </ul>		Janie Smith	Developer		
<b>In Scope</b>		<b>Summary Project Status</b>			
<b>Business Case</b>		Project Start Date:		08/01/2019	
Make the website mobile-responsive		Estimated Completion:		10/01/2019	
Increase business on mobile devices		Process Impacted:		Better mobile experience	
<b>Constraints</b>		Potential Financial Impact:		\$300,000	
<b>Assumptions</b>		<b>Milestones</b>	<b>Status</b>	<b>Due</b>	<b>Done</b>
Users' attitudes towards change		Current site UX test	•	08/07/2019	08/06/2019
<ul style="list-style-type: none"> <li>• Mobile users aren't purchasing as much</li> <li>• The website will continue to function during the redesign</li> </ul>		Redesign	•	08/21/2019	08/21/2019
<b>Deliverables</b>		Web development	•	09/21/2019	09/21/2019
<ul style="list-style-type: none"> <li>• Content that fits industry-standard screen sizes</li> <li>• A UX that works on mobile devices</li> </ul>		Staging site test	•	09/25/2019	09/23/2019
<b>Sponsor Approval</b>		New website live	•	10/01/2019	
<b>Date</b>		• Not Started • Completed • On Schedule • At Risk • Off Track			
Jane Doe	07/28/2019				



# Planning for Success – Planning Phase

Planning is where plans are documented, project deliverables and requirements are defined, and project schedule is created.

Includes:

- Project deliverables & requirements
- Scope
- Project Schedule
- Stakeholder assessment
- Risk assessment
- Project Model

Initiating

Planning

Executing

Monitoring & Controlling

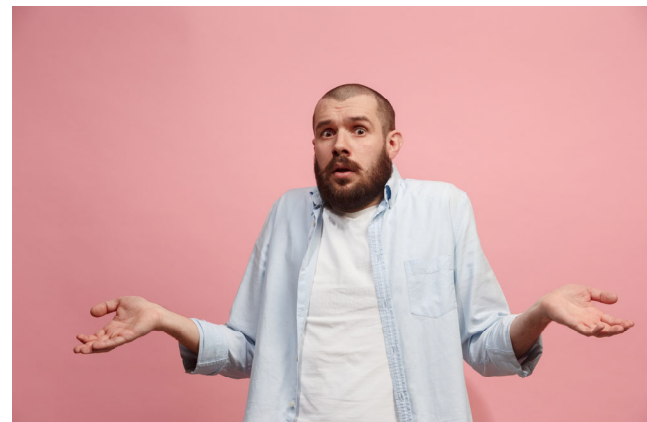
Closing



# What if I don't know what my final result is?

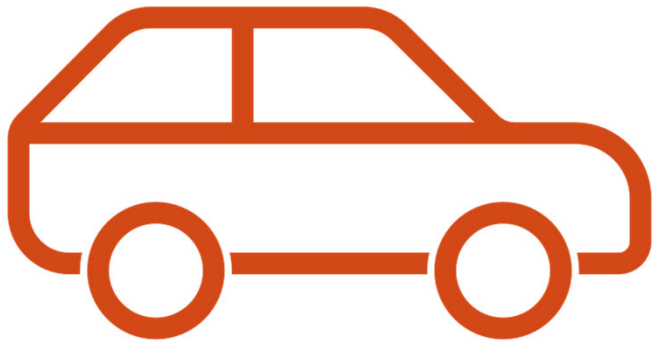
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- Not knowing the requirements
- Deliverable changes
- Uncertainty in Risk
- Too much Ambiguity!



Answer – Plan with the  
appropriate project model

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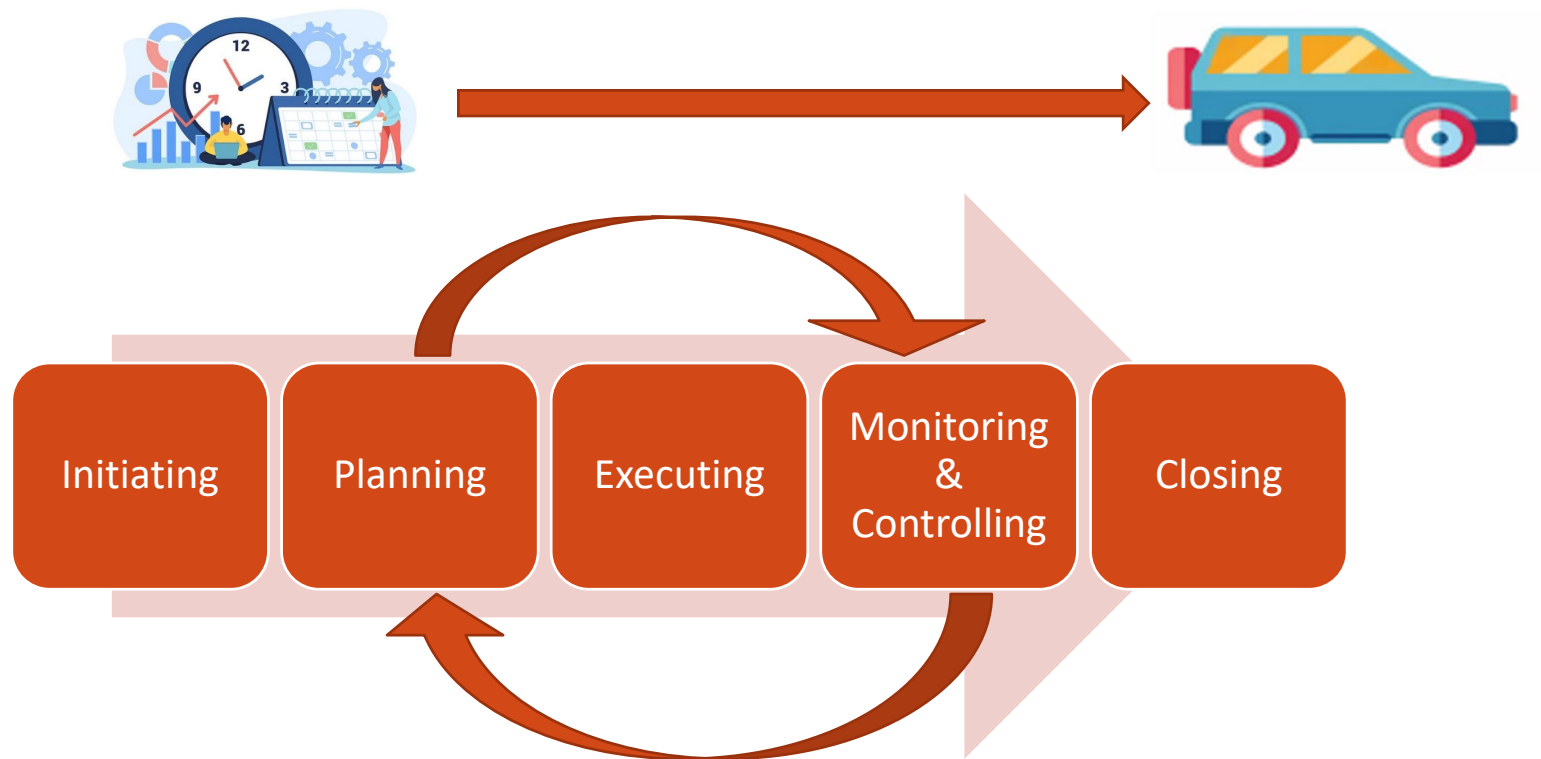


### **Example**

Build a mobile transport that can hold 2 adults, addition of 20 cubic liters of cargo

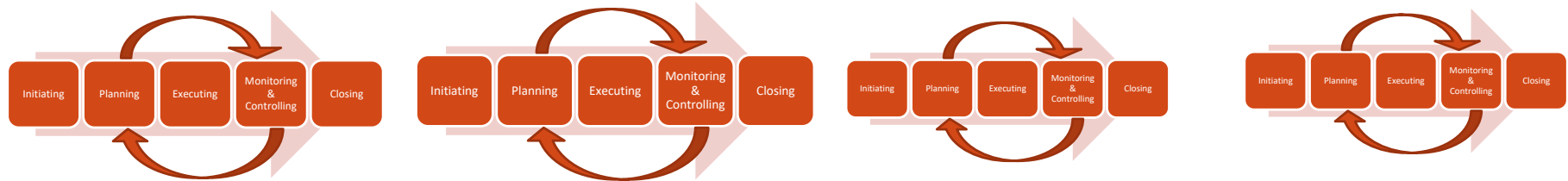
# Predictive – 6 years

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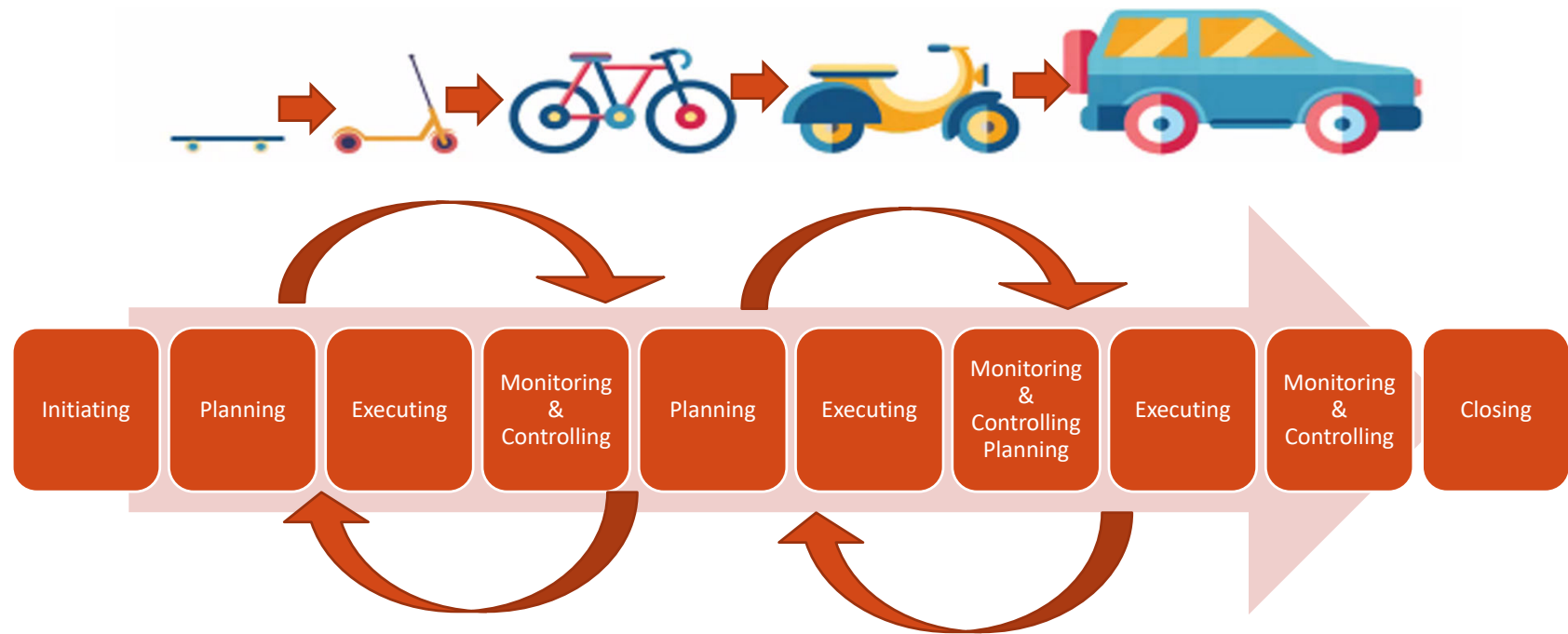
# Incremental – 3 years

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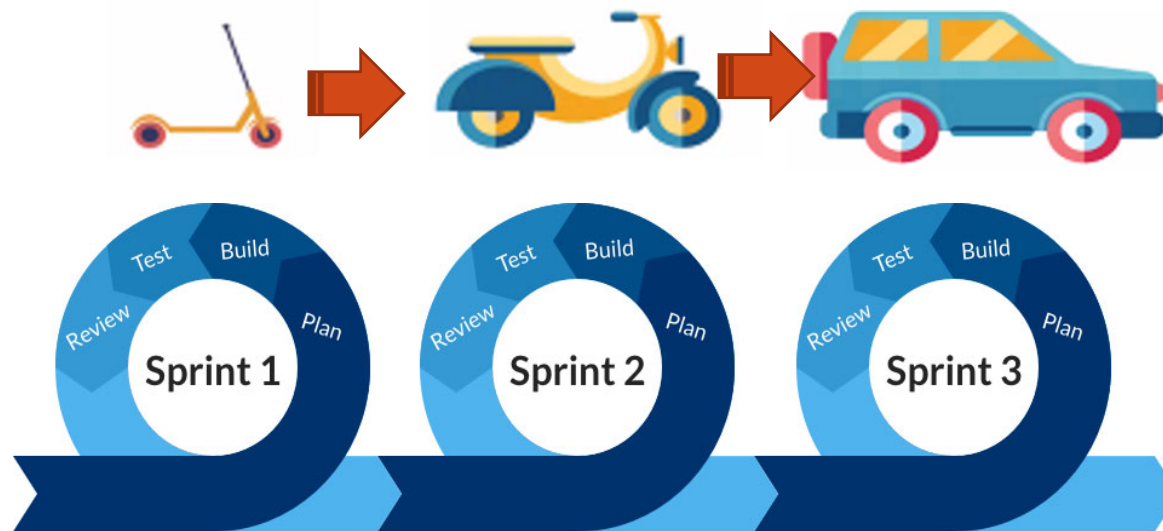
# Iterative – 4 years

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# Agile – 2 years

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Initiating

Planning

Executing

Monitoring &  
Controlling

Closing



# 4 project models

Predictive 6 years



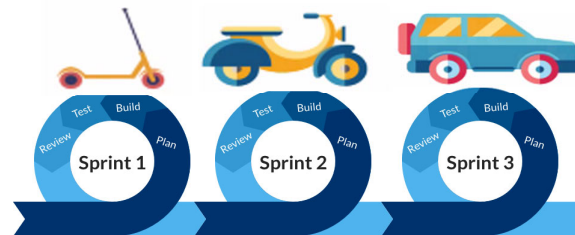
Incremental 3 years



Iterative 4 years



Agile 2 years



# 4 project models

## Predictive – Plan everything in the planning phase

- Strength – completely, thoroughly, and timely complete the project
- Limitation – Rigid nature, unable to quickly adapt. Need critical information during planning

## Incremental – Complete project in segments

- Strength – Speed
- Limitation – unable to quickly adapt & need critical information during planning

## Iterative – Create iterations of completed project, with revisions

- Strength – Making the right product through series of iterations
- Limitation – Can be timely, based on meeting satisfaction or project recipients

## Agile – Combination of incremental and iterative approach. Time and resources is fixed while scope can change

- Strength – adjust to changes promptly and create collaborative teams
- Limitation – requires everyone to be collaborative and have commitment to agile approach

## THE CHARACTERISTICS TABLE

Table 3-1. Characteristics of Four Categories of Life Cycles

Characteristics				
Approach	Requirements	Activities	Delivery	Goal
Predictive	Fixed	Performed once for the entire project	Single delivery	Manage cost
Incremental	Dynamic	Performed once for a given increment	Frequent smaller deliveries	Speed
Iterative	Dynamic	Repeated until correct	Single delivery	Correctness of solution
Agile	Dynamic	Repeated until correct	Frequent small deliveries	Customer value via frequent deliveries and feedback

# Determine the best model

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You are a Project manager for the following scenarios, determine the best model

1 – Government has subcontracted your firm to repair a section of highway 101

**Predictive**

2 – Your PD is asking you to create a recruitment guide for the next AY. You only know there will be several upcoming changes. Time is not an issue

**Iterative**

3 – You oversee the upcoming graduation ceremony. Timeliness is important and you can reference last year's graduation ceremony materials

**Incremental**

# Determine the best model

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4 – You are managing the relocation of your program's office space. You have all the requirements, resources, and information provided to you. This project is important and there is ample time.

**Predictive**

5 – PD wants you and your (competent & collaborative) trainees to plan a series of social events. Social event requirements is still unclear and will be continuously changing. There is limited time and there will be designated block times to work on this project.

**Agile**

6- Your department chair wants you to be in charge of implementing a wellness initiative in your program. Chair wants all important information (e.g. deliverables, scope, schedule) to be accounted for in the planning phase, but also wants the project to have enough flexibility to adjust to unknown changes.

**Hybrid**



Now that you picked  
the best model...time  
for more planning!

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# After the Project Charter, we need to work on scope (from deliverables)

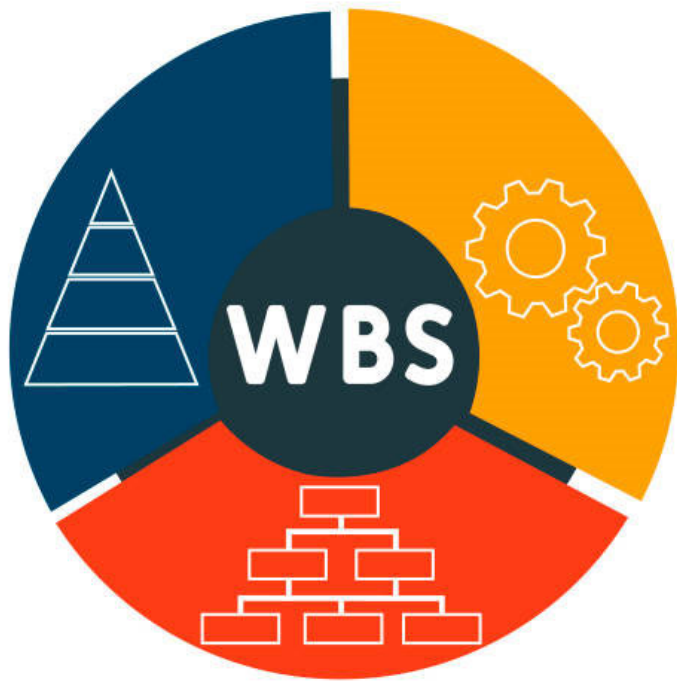
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Create the work breakdown structure



Recognize key stakeholders & assign responsibility – with RACI matrix



## WORK BREAKDOWN STRUCTURE

# Work Breakdown Structure

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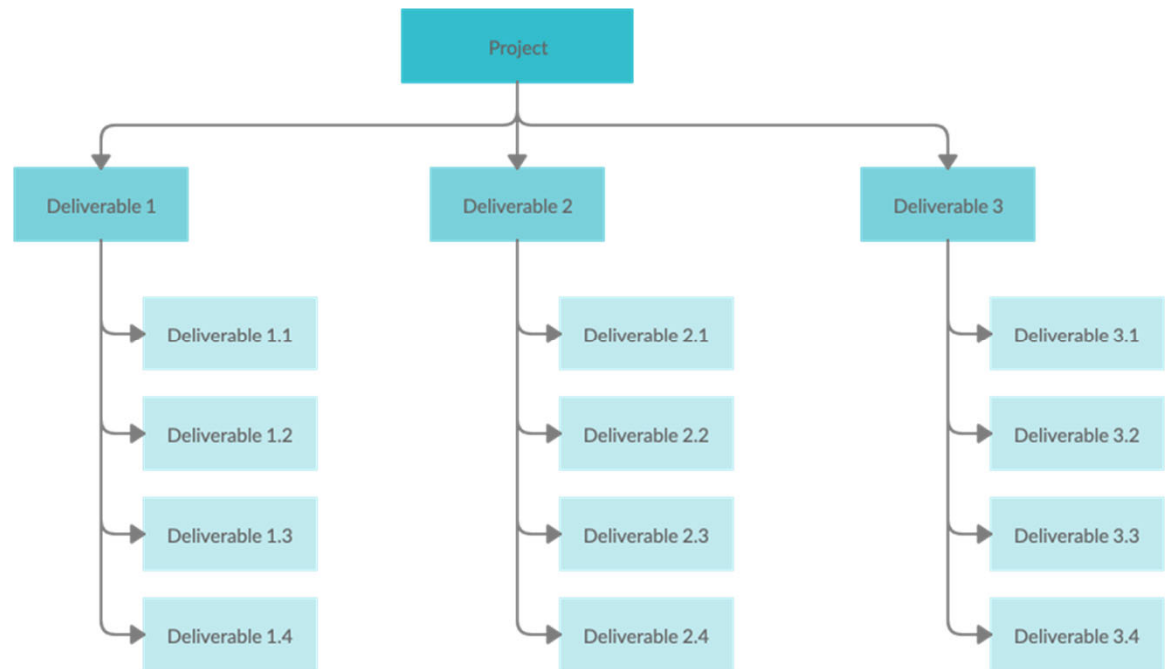
A “road map” of all scope needed to meet deliverable. Deliverable is based off requirements from project charter



# “Structure” of a WBS

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- Project
  - Major Deliverables
    - Activities
- Numbering is from major deliverable and order of activity

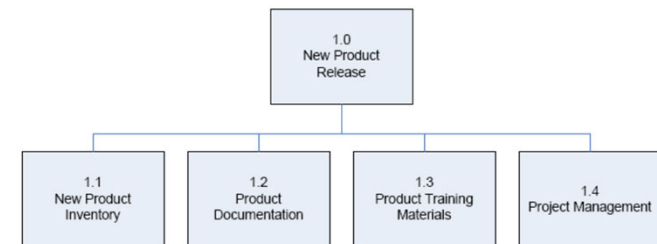


- 1.0 New Product Release
  - 1.1 New Product Inventory
  - 1.2 Product Documentation
  - 1.3 Product Training Materials
  - 1.4 Project Management

## 1. House project

- 1.1 Primary structure
  - 1.1.1 Foundation development
    - 1.1.1.1 Layout---topography
    - 1.1.1.2 Excavation
    - 1.1.1.3 Concrete pour
  - 1.1.2 Exterior wall development
  - 1.1.3 Roof development
- 1.2 Electrical infrastructure
- 1.3 Plumbing infrastructure
- 1.4 Inside wall development: rough finish

Exhibit 1--Outline View



# Examples of WBS



# RACI Matrix

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Responsibility Assignment Matrix – help all stakeholders understand where they are needed for key activities

R: Indicates that the role takes responsibility for carrying out the work.

A: Denotes the role that assigns the work and approves the deliverable before it's marked complete.

C: Refers to anyone who should provide feedback or who should be consulted about the activity.

I: Specifies roles who should be informed about certain project activities or milestones.



## RACI Matrix best tip

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- Have 1 designated person responsible for each key step
- Have 1 designated person accountable for each key step
- Include major key tasks
- Clarify meaning of each role
- Avoid over-assigning

# RACI Usefulness

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## GOOD FOR

- Highlighting key tasks
- Referencing appropriate person for the task
- Keeping people accountable & clear on individual assigned to person

## UNFIT FOR

- Laying out day to day operations
- Mapping out responsibilities with too many parties

# RACI Example

	 FRODO	 SAM	 GANDALF	 ARAGORN	 ELROND
Decide on what to do with ring	C	I	A	C	R
Create Fellowship	R	C	A	C	R
Get the ring to Mount Doom	R	C	A	C	I
Distract and defeat enemies	I	R	C	R	I

# Refresher

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- Project
- 5 Process Group
- 4 Project Types
- Project Charter
- WBS
- RACI

# Scenario

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You & your team are in charge of creating and designing the graduation ceremony for your program's graduating class of 2022.

## What you know

- **Initiation** – PD wants to make this year's graduation ceremony more “special” than last year. Last year, there was a small graduation ceremony done via Zoom. PD wants this ceremony to be reflective of the program's “engaging, unique, and diverse” culture.
- **Project type** – Predictive, Incremental, Iterative, or Agile?
- **Requirement** –
  - Graduation Ceremony is done safely in person
  - Budget is <\$25,000
  - At least 70% of your trainees attend (14 of 20)



# Activity Time: Make your own WBS

In your breakout group, make your WBS (hierarchy, outline, or other)

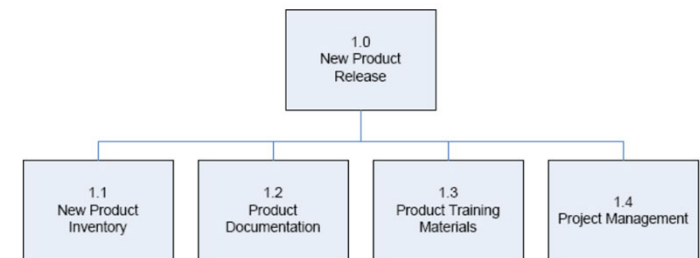
- Determine the key deliverables and their activities (if any)

Requirement –

- Graduation Ceremony is done safely in person
- Budget is <\$25,000
- At least 70% of your trainees attend (14 of 20)

- 1.0 New Product Release
  - 1.1 New Product Inventory
  - 1.2 Product Documentation
  - 1.3 Product Training Materials
  - 1.4 Project Management

Exhibit 1--Outline View



# In Short...How to carry out a project

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## **Initiation**

Explore a potential project idea  
create a business case (A need to create project)  
Project Charter

## **Planning**

- Determine best project model
- Determine Requirements
- Determine Scope & make WBS
- RACI Matrix

## **Execute**

## **Monitor & Control**

## **Close**



If you are  
interested in  
Project  
Management

**Project Management Institute offers the PMP  
certification**

- A four-year degree
- 36 months leading projects
- 35 hours of project management education/training
- OR —**
- A high school diploma or an associate's degree
- 60 months leading projects
- 35 hours of project management education/training

IT Tech offers the PMP education



# Handouts

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Project Charter Template

RACI Matrix Template

Work Breakdown Structure Template

# Contact Information

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- Slack - @Trey Huynh-Ngo
- Schedule a digital meet <https://calendly.com/huynhngo/meet-with-trey>



Questions?

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