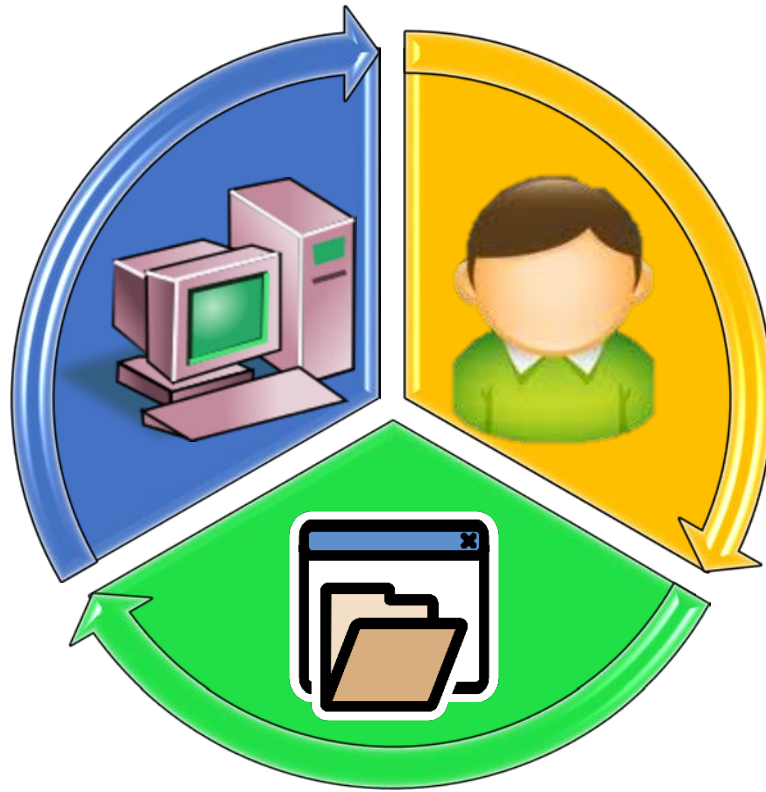# Project Manager Technology Suite

Training to Connect People and Processes with Software

Action Guide

By Dawn Jones and
Sherry Prindle

Table of Contents:

Chapter 1: Projects, Processes, and Priorities
Clarify the difference between projects and processes. Sort and organize priorities. Work more effectively with the people and projects you manage.

Chapter 2: Pro Tips, Techniques, and Tools for Effective Project Management and Planning
Use the right tools to make planning and execution of projects work within constraints and teams. An overview of various tools accompanies powerful case studies for practical application.

Chapter 3: Using Microsoft Excel to Connect People and Projects
Upgrade your knowledge of Microsoft Excel to include some lesser-known tricks that allow you to more effectively maneuver, analyze, and create reports for project management.

Chapter 4: Top Five Project Management Challenges Part One: Communication
Ensure projects are completed correctly and on time by learning how to give the right kind of instructions tailored to personalities and processing styles.

Chapter 5: Top Five Project Management Challenges Part Two: Projects, People, and Personalities
Give the right jobs to the right people in the right way to ensure accuracy and efficiency which ensures maximum operational functions.

Chapter 6: Top Five Project Management Challenges Part Three: Goals, Objectives, Methodology, and Values
Create and communicate goals and methodologies that defy misinterpretation. Maneuver the precarious area of values and constraints to complete projects that satisfy stakeholders.

Chapter 1: Projects, Processes, and Priorities

6-Stage Process for Every Project

1. Define – What are we doing, and why are we doing it?

2. Plan – How are we doing it? When, where, and with what resources?

3. Implement – Doing the project.

4. Complete – Specific deliverable.

5. Evaluate – What worked, and what could we do differently next time?

6. Celebrate – Do something to reward yourself and/or team.

Project vs. Process:

6 Characteristics that Define a Project

1. It is something that has never been done before.

2. It ends with a specific accomplishment or achievement.

3. It has a beginning, an end, and a completion date.

4. Resources (schedule, time, money, etc.) are limited.

5. Other people are involved on an ad hoc basis.

6. Phases and activities are sequenced, with milestones and event markers to show progress.

Project vs. Process

Projects can be comprised of processes, such as this six-stage process. For example, this process can be used to establish the steps in building a warehouse, or for setting up an accounting system. How would you explain the project/process differences to one of your team members? _____

Six Stage Project Process①
- Define
- Plan
- Impliment
- Monitor
- Adjust
- Complete
- Evaluate
- Celebrate
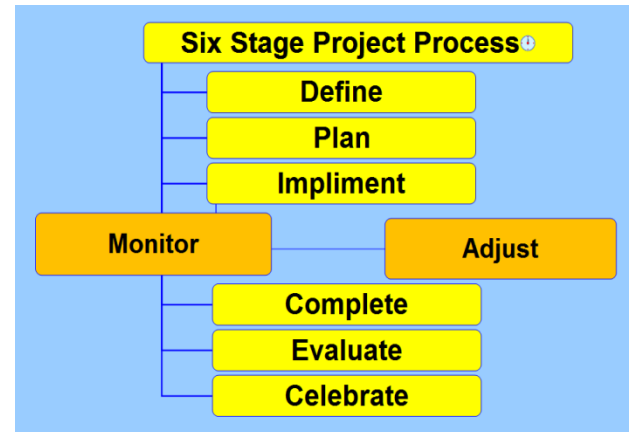
The Triple Constraints

Time/schedule, quality/scope, and budget/resource are fully interrelated and must be ranked in order of the driving, middle, and weakest constraint according to the goals and priorities of the project and/or the goals of the stakeholder(s). Any adjustment to one will affect the others. In many cases, a project manager may be quick to change one aspect of the project by adding scope to a project or agree to a budget cut without considering the consequences of that change to the other constraints. Any adjustments to time, quality, or budget will lead to future project issues. By ranking these constraints and considering all of them before making changes to the project, you ensure the highest chance of project success and completion.

Driving Constraint: Most Important and least flexible. Failure to accomplish the driver and the project is a failure.

Middle Constraint: Less important than the driving constraint but more important than the weakest constraint.

Pie chart:
- Quality
- Budget
- Time

Legend:
- Quality/Scope
- Budget/Resource
- Time/Schedule

Weakest Constraint: Most flexible and or least important constraint. If a major change needs to take place within a project, start with the weakest constraint for the least amount of project impact.

Action: Ranking a Project

1. Choose a current project you are working on.
2. Determine the time, quality and budget you have for that project
   a. How much time is required? _____
   b. What is the desired outcome or quality? _____
   _____
   c. How much will this cost you in money or man-hours? _____
   _____
3. Rank the constraints in order of priority
4. Put the project onto your calendar

Action: Rank yourself

1. Rank what's most important to you by nature
   a. Time
   b. Quality
   c. Budget
2. Ask yourself as you face each task throughout your day what is most important, time, quality, or budget. This will also help you with prioritizing.

The Consulting Phase

Begin with finding out what is most important to your stakeholders.

Good Questions to Ask:

- Is the deadline on this project a target date or an actual deadline?

- Which is more important, staying under budget or delivering the highest quality or completing the project on time?

- If we have to cut time from this project, either the quality will go down, or the budget will go up, what is your preference?

How can you use WAG (Wildly Aimed Guess) or SWAG (Scientific Wildly Aimed Guess) as estimates if you've never completed this particular project?_____

_____

_____

Chapter 2: Pro Tips, Techniques, and Tools
A Project Manager's Success Kit

The Three T's

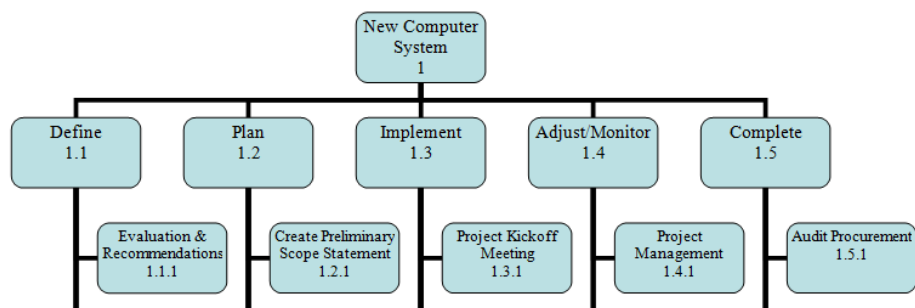**Give an example for each of the following:**

1. Tips _____

2. Techniques _____

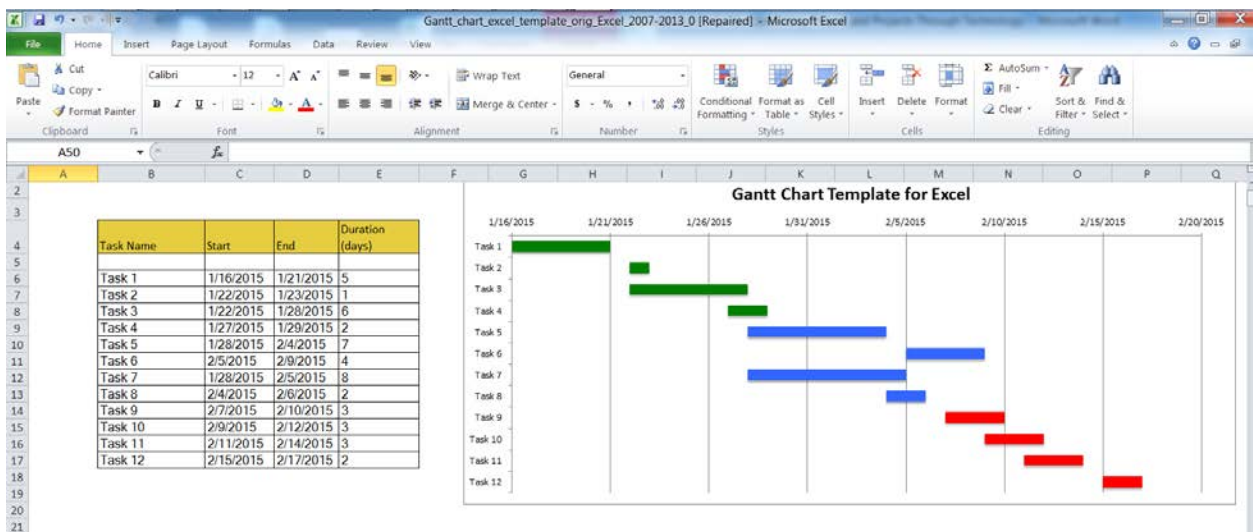**3. Tools** _____

Why is it important to use all three? _____

_____

Three Project Management Tools

1. **Project Work Breakdown Structure (WBS)**

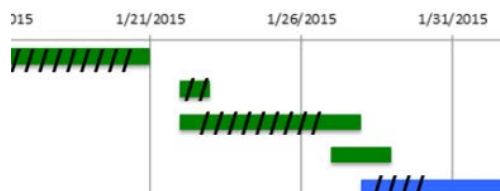
Notes: _____

_____

_____

_____

2. Gantt Charts

Diagonal Lines through schedule shows percentage of project completion:

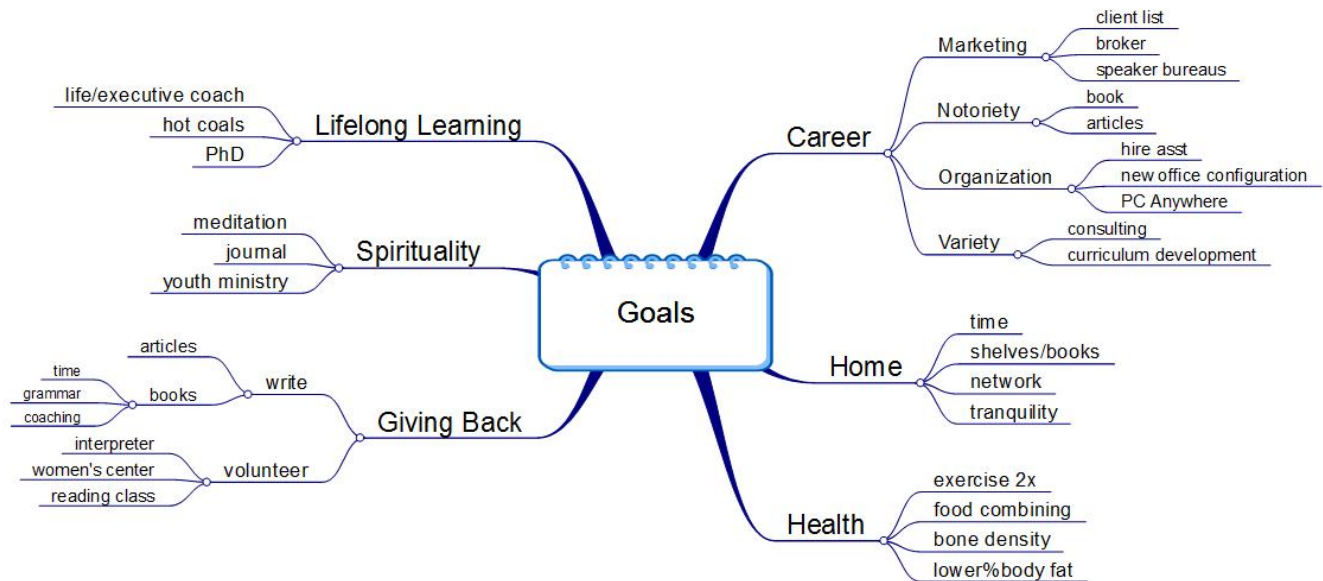## 3. PERT Charts (Program Evaluation and Review Techniques)

4. Time Estimates
- Time Optimistic
- Time Pessimistic
- Time Most Likely

5. Critical Path Method

Planning Tools: Mind Mapping

- Utilize Your Right Brain and Your Left Brain

- 5 Minutes Defining Through Brainstorming

- 5 Minutes Putting Ideas into a Linear Calendar

- 5 Minutes Adding Steps to a Time Schedule

- Use Software or Paper to Track Ideas

- What's Working, What's Not Working?

- Key Questions

Planning Tool Software:

- Project by Microsoft

- MindMapper by SimTech

- ConceptDraw MindMap (and Project)

- MindJet Mind Manager

- www.MindMappingSoftwareBlog.com

- Bonus To-Do Sheets and Templates

To – Do

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.
13.
14.
15.
16.
17.
18.
19.
20.

Current Projects & Priorities

Rank	Goal	Due Date
____	_____	_____
____	_____	_____
____	_____	_____

Where Does It Go ☺
Finish What You've Started!

TO-DO

Current Projects & Priorities

Rank	Goal	Due Date
____	_____	_____
____	_____	_____
____	_____	_____

Priority #	**High Priority – Now – Today**	Priority #	**Priority – Planned – Calendar – This week**

Priority #	**Med Priority – Schedule Next 2-Weeks**	Priority #	**Low Urgency – Next 4-Weeks**

Priority #	**Emails – Phone Calls – Voicemails**	Priority #	**New Ideas – Other**

			Home	**Store** ___

Priority #	

|				
	Interruptions			

Chapter 3: Using Microsoft Excel to Connect People and Projects

Using Excel in the Field of Project Management:

Browse templates to get an idea of the scope of possibilities.
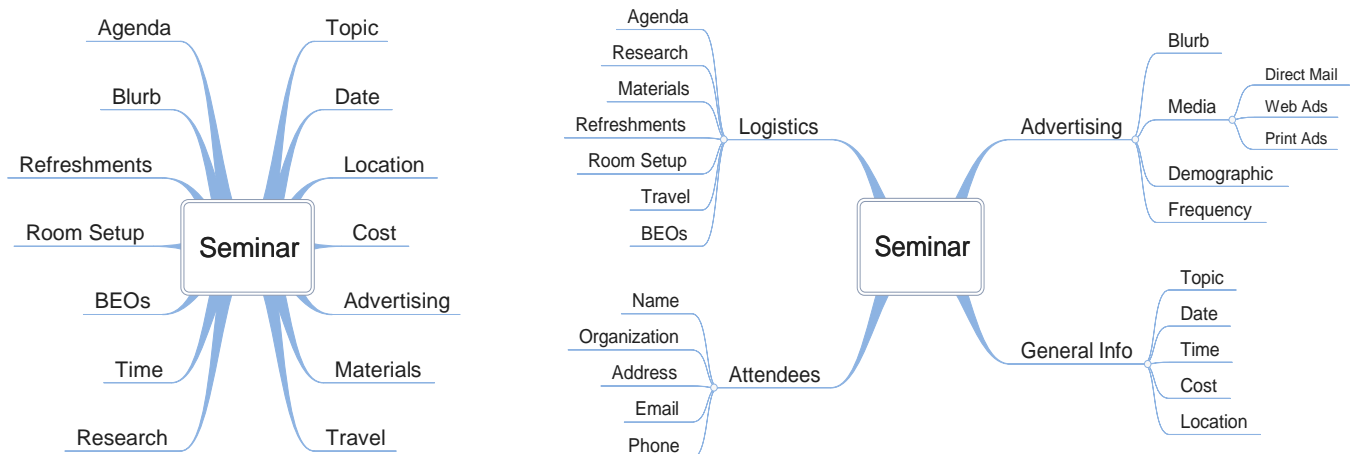
1. File

2. New

3. Type in "Project Management"

Prioritize the priorities: which of your priority items are the top priority? Estimate how much time each would take to accomplish, and schedule them.
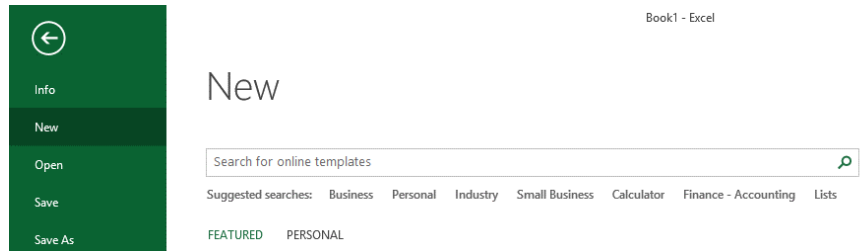
Designing a Spreadsheet

Mind map the content, then sketch the layout.

Each main topic is a separate workbook or sheet. Branches off of topics are column headings. One of the branches is the variable by which to divide sheets.

Hot Tip: *Design your spreadsheets to grow downward. Also, remember you can only sort and filter vertically, so put the item you would likely want to manipulate into the rows.*

Smart Shortcut: *Switch the rows and columns of a spreadsheet by transposing.*

1. Copy the data to be transposed (without merged title cells)

2. Click the target location

3. Right Click > Paste Special > Transpose

4. Delete the old rows

If the formatting is not right, use *Paste Special* again and choose *Formats* or . . .

First Quarter Sales			
	January	February	March	Total Sales
California	$9,700.00	$6,887.00	$7,954.00	$24,541.00
Florida	$5,774.00	$16,912.00	$6,349.00	$29,035.00
Georgia	$4,712.00	$5,330.00	$1,990.00	$12,032.00
Indiana	$9,957.00	$3,778.00	$5,555.00	$19,290.00

	California	Florida	Georgia	Indiana
January	$9,700.00	$5,774.00	$4,712.00	$9,957.00
February	$6,887.00	$16,912.00	$5,330.00	$3,778.00
March	$7,954.00	$6,349.00	$1,990.00	$5,555.00
Total Sales	$24,541.00	$29,035.00	$12,032.00	$19,290.00

Use the Format Painter

1. Click a cell or range of cells that have the desired format

2. Click the paintbrush icon

3. Click and drag the paintbrush over the area you want to paste the format

4. Double click the format painter to paste to more than one location

Data Entry

1. **Input Data:** Click a cell > Type the information > Leave the cell

2. **Edit Data:** Double click the cell or hit F2 to put your cursor into the cell or click the cell and edit on the Status Bar
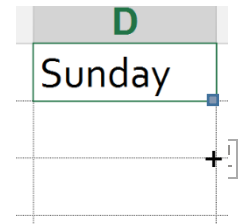
3. **Replace Data:** Type over the current date > Leave the cell

AutoFill

Excel can fill a series of numbers or dates; it knows the months, days of the week, and their abbreviations. It copies and learns patterns; you can even create custom lists.
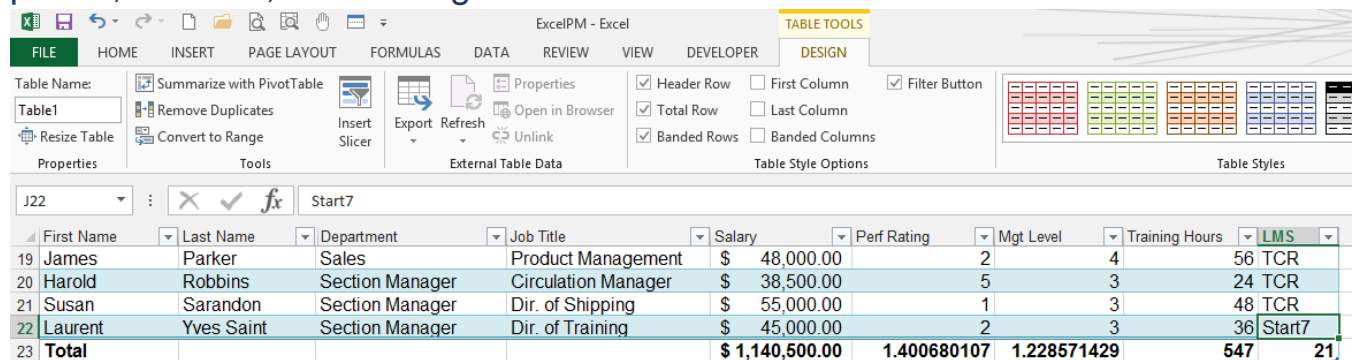
1. Type the first item in the series in a cell

2. Click the square in the bottom right corner of the cell, and drag to fill

3. Click the icon that appears at the bottom right when you release the Auto-Fill Handle to change fill options

Format as Table

On the Home ribbon, *Format as Table* automates alternate row shading, freeze panes, the filter, and adding a total row. Tab from the last data cell to add rows.
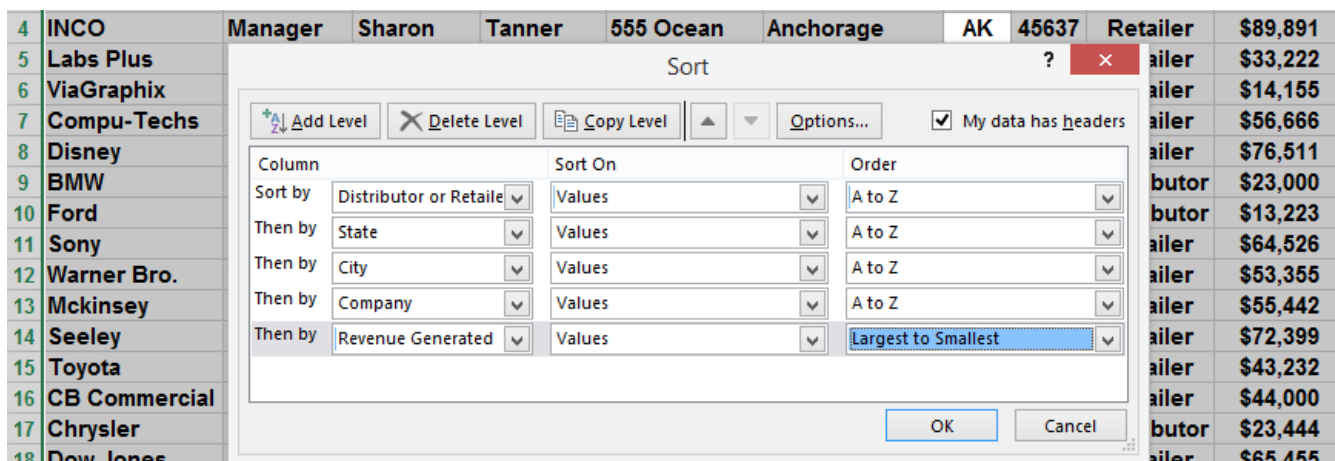

Sort

1. Click a **single cell** in the column you want to sort by

2. On the *Home* or *Data* Ribbon click *Sort A-Z* or *Z-A*

3. Use the *Custom Sort* for a multi-level sort

Advanced Filter

Pivot Tables

First	Last	Hire	Department	Job Title	Salary	Perf	Mgt	Training	LMS
			mana	mana					
					>46000	>3			
		<1/1/1995							

First	Last	Hire	Department	Job Title	Salary	Perf	Mgt	Training	LMS
Hans	Anderson			Office Manager	$ 42,000.00	4	2	11	TCR
Jane	Fonda			Vice President	$ 91,000.00	4	1	6	In-House
George	Moore			Vice President	$ 106,000.00	5	1	27	TCR
Giselle	Swan			Dir. of Advertising	$ 46,000.00	3	2	9	Start7
Ahmed	Zahn			Web Designer	$ 55,000.00	2	2	40	TCR
John	Boudreau			Accountant	$ 51,000.00	1	4	96	TCR
Marsha	Brady			Technical Writer	$ 58,000.00	1	5	42	TCR
Anna	Buchannan			Accountant	$ 43,000.00	4	4	20	TCR
Faith	Hill			Graphic Designer	$ 49,000.00	3	5	4	None
Juan	Montoya			Marketing Manager	$ 85,000.00	1	3	2	None
Martin	Short			Division Manager	$ 42,000.00	3	3	60	TCR
Keisha	Alexander			Payroll Manager	$ 41,000.00	5	3	18	In-House

Advanced Filter dialog:
Advanced Filter

Action
◉ Filter the list, in-place
○ Copy to another location

List range: $A$5:$J$26
Criteria range: Pivot!$A$1:$J$4
Copy to:

☐ Unique records only

OK   Cancel

You can take your spreadsheet apart column by column and put it back together in any configuration you want. Pivot Tables allow you to analyze and recombine data into reports and charts.

1. Select one cell within the data

2. Click Insert > Pivot Table > OK

3. Check or drag items in the *Field List* to the *Row, Filter, Column, or Values* areas

Right click *Values* column headers to change the operation
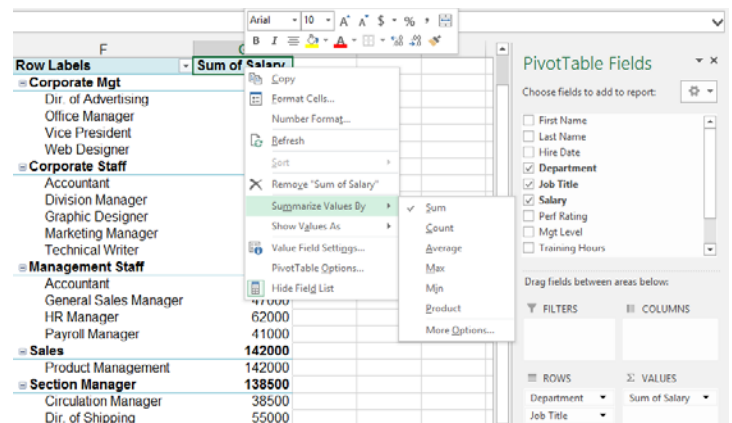
Right click row and column headers to see group options
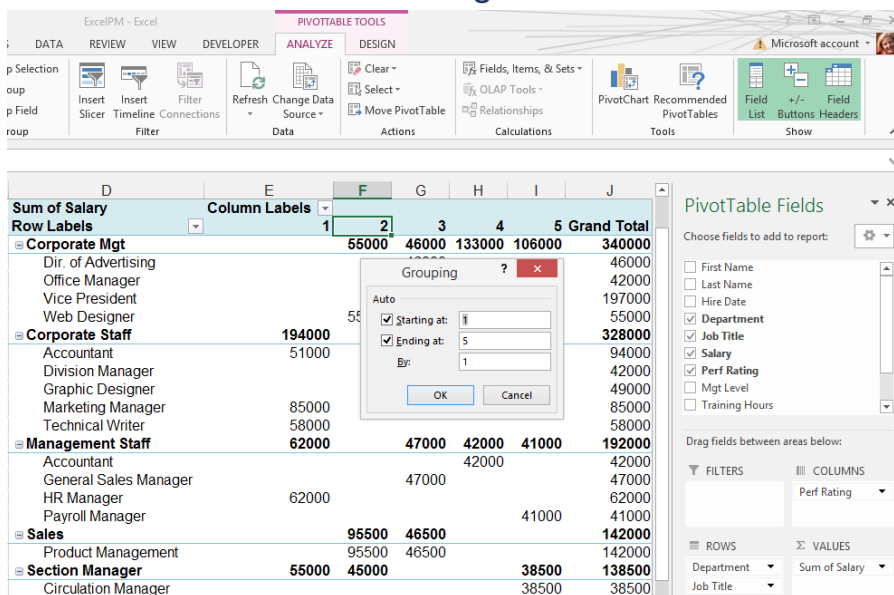
Explore the *Pivot Table Tools Analyze* and *Design* ribbons for options such as:

Create Pivot Chart

Hide Field List

Insert Slicer

Adjust Layout

Chapter 4: Top Five Project Management Challenges Part 1 - Communication

Problems Stemming from Unclear Communication

Write down some of the problems you've faced in work and life due to unclear communication:_____
_____
_____
_____

4 Learning Methods

Clearly communicate instructions by incorporating all four methods

1. Visual – Pictures, presentations, etc. (fastest way to teach concepts)

2. Verbal – The spoken word (44% need to hear it)

3. Tactile – Hands-on interaction (best way for people to remember)

4. Written – The written word (use bullet points)

Your Preferred Style
What is your preference for receiving and sending communications?

Preferred Sending Style (Rank 1-4)   Preferred Receiving Style (Rank 1-4)

Visual _____   **Visual** _____

Tactile _____   **Tactile** _____

Verbal _____   **Verbal** _____

Written _____   **Written** _____

The secret to clearly communicating your instructions: Include all four learning methods.

How can the *Colombo Technique* help you confirm your instructions were understood when you're communicating with someone who gets defensive when given instruction?

_____

_____

_____

_____

3 Stages of Learning a New Skill

1. Awkward _____

2. Mechanical _____

3. Natural _____

What does it take to form a new habit?_____

Remember, Practice makes _____

Communication and the Triple Constraints

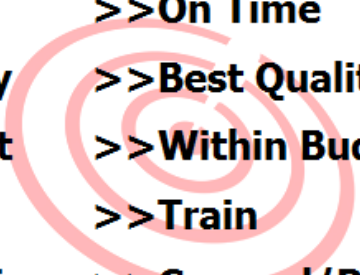"There's no reason why my team can't make this happen within a month."

Time _____

Quality _____

Budget _____

Chapter 5: Top Five PM Challenges Part 2 - Projects, People, and Personalities

Identify and prioritize projects and people by clearly defining project goals and deliverables. Organize and prioritize the diverse items that interrupt the daily plan to achieve optimum balance and productivity.

Managing Projects and People: Six Targets to Hit the Project Bullseye

1. Time   >>On Time
2. Quality   >>Best Quality
3. Budget   >>Within Budget
4. Skills   >>Train
5. Behavior   >>Counsel/Practice
6. Attitude   >Performance Improve

Sample Project: _Become a Better Communicator_

Questions to ask include: What are my motives? WIIFM: What's In It For Me? Why should I work on this project? How much time should I allocate for this project? How will I know I've progressed in my communication? What are some changes I'll see? How much will this cost?

Sample Goal: Become a better communicator

- Time Frame: 1-year
- Quality: Measurable objectives—tangible and intangible
  - Complete a communications course
  - Join a Toastmasters™ group
  - Become a better listener
  - Ask Better Questions
  - Be more patient
  - Become more assertive less passive or aggressive
- Budget/Cost
  - What will it cost me to do this?
  - What will it cost me if I don't do this?

<u>Five questions to ask yourself when undertaking a project:</u>

1. How / Why
2. When / Why
3. Where / Why
4. Who / Why
5. What / Why

Action: Your Goal

Choose a goal you'd like to accomplish within the next year—professionally or personally. Write down your goal along then answer the following questions:

<u>MY GOAL:</u> _____

_____

_____

1. How are you going to accomplish this goal, what are some action steps?

2. What is the cost? What is the financial cost? Emotional cost? Time cost?

3. What is the cost if you don't do it? Financial cost? Emotional cost? Time cost?

4. When are you doing it? What date? What Time?

5. Where are you doing it?

6. Who is doing this? Who is helping you do this?

Connecting your projects to people: Measuring People Productivity

- o Skills

- o Behavior

- o Attitude

Documenting and confronting poor skill or behavior or bad attitude using the Respect Most/Improve Upon technique:

Write down three things you respect most about this person in relation to the project or task at hand.

1._____

2._____

3. _____

Write down one thing you'd like them to improve in relation to the project or task.
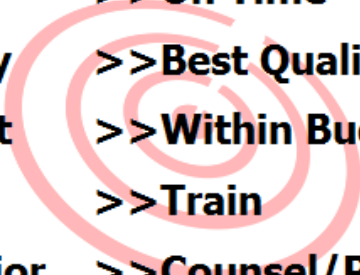
_____

_____

Action: What do you look like when you're working with people you respect? What do you look like when you're working with people you don't respect? _____

_____

_____

Documenting Bad Attitude Using the 6-targets and the Respect Most / Improve Upon technique:

_____

_____

_____

As a project manager, what two things are you looking for from your team members:

1. _____

2. _____

1. **Time**   **>>On Time**
2. **Quality**   **>>Best Quality**
3. **Budget**   **>>Within Budget**
4. **Skills**   **>>Train**
5. **Behavior**   **>>Counsel/Practice**
6. **Attitude**   **>Performance Improve**

Adapting your personality without coming across as being either weak or intimidating:

Like traveling to a foreign country, you learn enough of the language to accomplish your goals and objectives. Write down how you can adapt your personality style along with your tone, tempo, and body language to speak the language with a personality that is different than yours:

o Direct/driver style _____

_____

o Thinker/analyzer style _____

_____

o Social extrovert _____

_____

o Relational person _____

_____

Three stages you'll go through when developing new and more productive habits:

1. Awkward _____

2. Mechanical _____

3. Natural _____

Action for the Week:

Practice speaking the language of a personality that is different than yours

o Tone

o Tempo

o Body Language

Notes:_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Chapter 6: Top Five PM Challenges Part 3 - Goals, Objectives, Methodology, and Values

People can perform in a project as well as the infrastructure allows. Goals, objectives, and methodologies are set up on a field of conflicting values. Creating structure with these challenges in mind allows project managers, team members and stakeholders to play in a shared arena following agreed-upon rules.

Determine How the Project is Going

1. Meet with the team as a group – Get a fortified explanation of the status

2. Meet individually – Get a better idea of weak links and impacts

    State specific objectives

    Hear them out

3. Research – Time Sheets, CC Emails, etc.

Methodology

1. Six Anchor Points – Time, Quality, Budget, Skills, Behavior, Attitude

2. SMART –ER Goals

    Specific

    Measurable

    Agreed-Upon

    Realistic

    Time Bound

    Evaluated

    Rewarded

3. USA Technique (Understand, Situation, Action)

4. Exact Expectations – Get Agreement

5. Respect Most / Improve Upon

6. Communication / Follow-Up with Preferred Method

Values

Our values are a complex combination of our thoughts, emotions, beliefs, and traditions which help define our morals and ethics and set the standards by which we work and live. When aspects of a project contradict a person's values or people within the project undermine or dismiss the importance of values, the project suffers.

Action for this week:

List out some times where your values have clashed with the values of a project or a team member or a stakeholder and how it impacted you and your contribution to the project:_____

_____

_____

_____

How did you resolve the issue? _____

_____

_____

What are some things you would do differently next time? _____

_____

_____

_____

Notes:_____

_____

_____

_____

Action for current and future projects:

- Implement the tips, techniques, and tools you've learned from this program including using SMARTER goals.

- Utilize and communicate the six stage process for every project by defining, planning, implementing, completing, evaluating and celebrating while monitoring and adjusting as you go.

- Take the time to accurately rank and prioritize the triple constraints of time, quality, and budget.

- Remember to include the consulting phase of the project to clarify project goals and the stakeholder(s) expectations.

- Employ the project management tools including Excel spreadsheets, Gantt charts, work breakdown structures, project management software, and mind mapping then choose the ones that work best for you, your project and your team.

- Deliver your instructions by implementing the four different learning methods including verbal, visual, tactile, and the written word.

- Point people to the six targets of any project by getting them to focus on and prioritize time, quality, budget, skills, behavior, and attitude.

- Adapt and adjust your personality style to those that are different than yours by being direct or analytical or more extroverted or relational.

- Practice the respect most/improve upon technique by naturally and honestly catching people doing the right things and pointing those things out prior to pointing out areas that need to be improved or changed.

- Regularly meet with your team and the stakeholders to keep them apprised of project progress or setbacks, as well as individual and team obstacles and accomplishments.

- Remember to be a person of integrity by living your values and respecting people who believe different than you. Strive to be the same person of character publically, privately, and secretly.