

Project Management Guidelines: Basic elements summarized



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Purpose of this document

- ▶ This document was prepared in the context of discussions about ensuring the successful execution of strategic initiatives
- ▶ The information contained herein summarizes my own approach to managing strategic initiatives. It was created it based on methodology taught by the Project Management Institute, tailored to specific projects and resources.
- ▶ The purpose of this document is to serve as a guideline for leaders who wish to implement light yet results-focussed governance of strategic projects.



Pre-Launch Phase



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Project Charter

- ▶ A Project Charter is an initiating document that defines the project's purpose, identifies objectives and provides the project manager the authority to undertake the project. It is also a communication tool.
- ▶ It has 5 basic elements:



- ▶ A good article can be found here:
<https://www.linkedin.com/pulse/20140320191215-6552025-the-basic-project-charter-the-right-thing-the-right-way/>



Sample Project Charter

PROJECT CHARTER FOR _____	
Project Statement: What issue are we trying to solve? What's the impact of the project? To whom?	Project Scope & Costs: What's included in the project? Excluded?
Goal Statement: What will be achieved? How? By When?	Anticipated Benefits:
High-Level Milestones: Project Kickoff: <u>(date)</u> Project Launch: <u>(date)</u> Project Completion: <u>(date)</u>	Anticipated Issues & Risks:
<u>Team Members:</u>	
Project Sponsor:	Project Lead:
Project Members:	



Project Planning Phase



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Project Execution Plan

- ▶ Proper planning is a key component of successful execution of any initiative.
- ▶ A project execution plan can be done either with:
 - ▶ a detailed project schedule (Waterfall) or
 - ▶ using “Scrum” methodology
- ▶ In either case it is essential to have:
 - ▶ A clear and accountable project leader
 - ▶ An objective which is formally stated and measurable
 - ▶ A list of tasks with clear owners for each task
 - ▶ Regular progress reviews with the project leader and with the sponsor



Project Execution Plan: Scrum Methodology



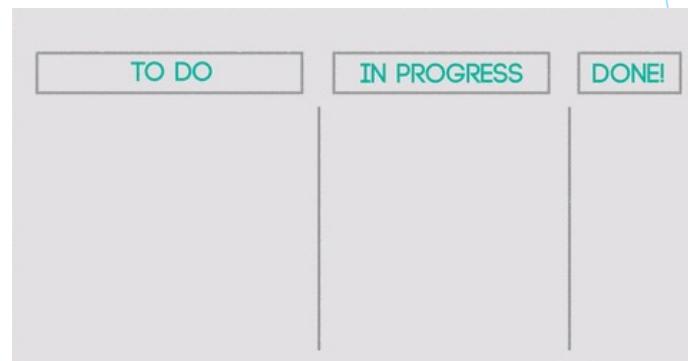
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Scrum Method

- ▶ Scrum methodology focuses on speed of execution through daily communication
- ▶ The Scrum Board is used as a visual, “live” project management tool

METHODOLOGY (simplified)

- ▶ Step 1: Identify all tasks on post-it notes. Place them in the “to-do” column.
- ▶ Step 2: Assign tasks to team members. Their name is placed on the post-it. It is placed in the “in-progress” column.
- ▶ Step 3: the Project Leader holds a 15-minute debrief in front of the scrum board every day to follow up on tasks & to remove obstacles



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Project Execution Plan: Waterfall Method



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Project Execution Plan: Waterfall Method

- Classic Project Management methodology is linear, dependency-based
- The project schedule should identify all tasks, their order, owner, completion status, and owner

WATERFALL PROJECT PLAN (simplified)

Reference: Tewatohni'sakta Mandate & Roles Document, June 2017.

Proposed Schedule of Key Activities	Activity Owner	Status	Q1 2018						
			APRIL				7	14	
			2	9	16	23	30		
Communicate Mandate objectives, brainstorm potential initiatives & requirements	Lead: Dir. E&T Support: CEO, Consultant	Complete						7	
Review ongoing initiatives (Start-Stop-Continue)	Lead: Dir. E&T Support: CEO, COO		2						
Prioritize & select initiatives for 2018/19	Lead: Dir. E&T Support: CEO, COO		2						
Align Budget and Organizational structure with 2018/19 initiatives	Lead: Dir. E&T Support: CEO, COO, HR, Finance			9					
Cascade 2018/19 initiatives to team, identifying a clear leader for each	Lead: Dir. E&T Support: CEO, COO, HR, Finance				9				
Define SMART objectives for each initiative & individual	Lead: Dir. E&T Support: CEO, COO, HR, Finance					16			
Develop Program Plans & KSMs for each 2018/19 initiative	Lead: E&T Team Members, as assigned	Ref. Annual					23		30



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Weekly Meetings

- ▶ Weekly meetings are held by the Project Leader with the Project Sponsor to provide a status update, to highlight progress, and to define next steps
 - ▶ The Project Sponsor is responsible for helping the Leader remove obstacles
 - ▶ The Project Sponsor must set expectations and provide coaching & information
- ▶ A Weekly Project Meeting template is on the next page
- ▶ An excellent article by the Project Management Institute on holding productive weekly meetings can be found here:
<https://www.pmi.org/learning/library/secrets-running-project-status-meetings-7009>



Weekly Project Update Meeting Template

Project Title:	Project Lead:	Project Deadline:
Current Task:	Task Owner:	Task Deadline:
Progress since last week:	Wins & Issues:	Issue Resolution Plan:
Activities for next week:	Anticipated issues:	Issue Resolution Plan:



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Monthly Project Updates

- ▀ A Balanced Scorecard should be reviewed with the Project Sponsor and Senior Management to provide a bird's-eye view of progress
 - ▀ “Balanced” because several aspects of the project are weighed in determining success
 - ▀ “Actual” and “Target” boxes can be green (meeting target), or red (short of target)

Project Name: _____				Monthly Results		Annual Results	
Levers	Measurable KPI	2018 Target	Comments	Actual	Target	YTD Actual	YTD Target
Quality							
Productivity (or Schedule)							
Human Development							
Stakeholder Management							
Cost							



Other Considerations



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Other elements to consider

- ▶ **Stakeholder management** is a key component of managing projects, especially when external parties need to be involved/made aware/convinced of the benefits of the project. We often manage stakeholders in an informal, ad-hoc way. However, for complex or sensitive projects, a stakeholder management plan is required to identify supporters and detractors, and to communicate effectively.
- ▶ Depending on the criticality and complexity of the project, a **Risk & Opportunities Management Plan** may be required to define and track mitigation plans or to harness potential opportunities.
- ▶ The internationally-recognized Project Management Institute provides formal training and tools at <https://www.pmi.org/learning/training-development>



For more information, contact:

Lesley Antoun, MBA, B. Eng.

514-518-7975

lesleyantoun@gmail.com

www.lesleyantoun.com

www.linkedin.com/in/lesleyantoun



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