



Managing Multiple Projects Successfully For Small Business Owners

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Education & Credentials

San Jose State University
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Master of Science in Recreation
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Sr. Project Manager/Consultant,
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Workshop Goals

Discover Key Project Management Tips to Avoid Costly Mistakes

1. Create work breakdown structures to build solid schedules.
2. Managing Change through quality communication



Why Project Management?





**Do you
ever feel
like you're**

...

***not making
progress?***



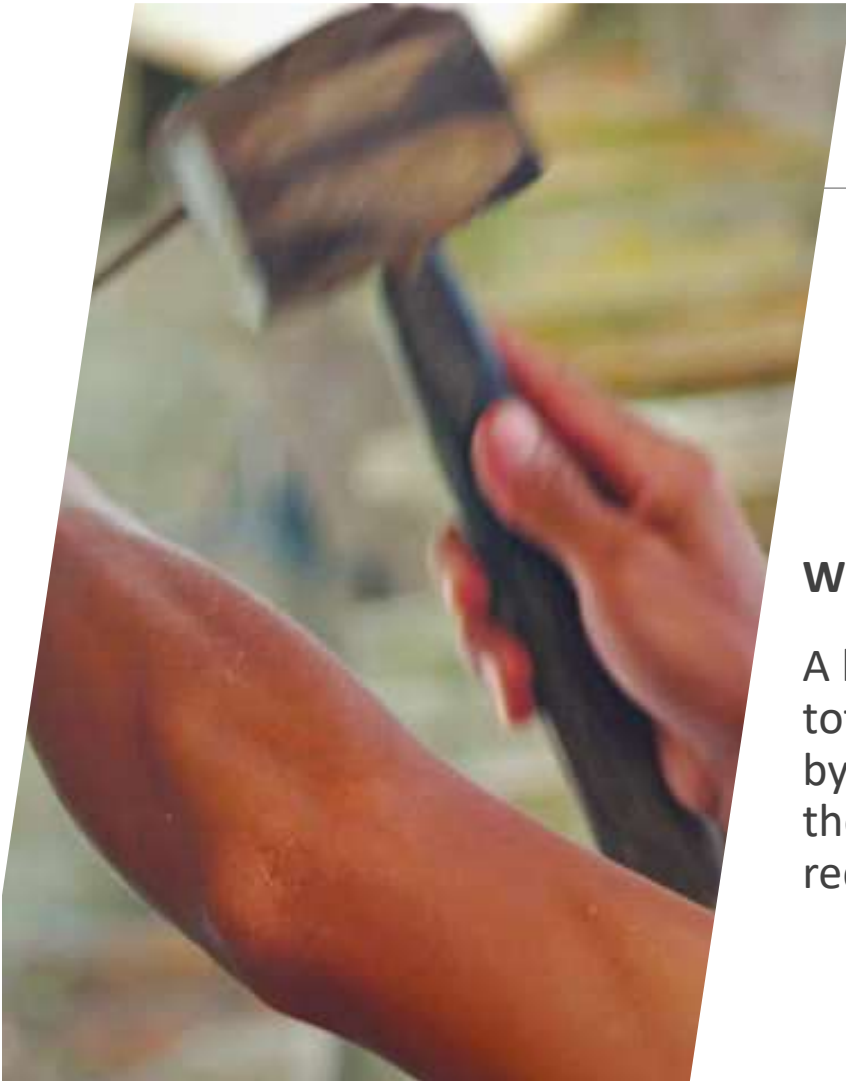


Work Back Planning vs Work Breakdown Structure



HOW DO WE
GET ALL THE
WORK THAT
NEEDS TO BE
DONE
ORGANIZED
AND
PLANNED
BEFORE WE
LAUNCH A
PROJECT?

Creating a
Work
Breakdown
Structure
(WBS)



Work Breakdown Structure

What is a WBS?

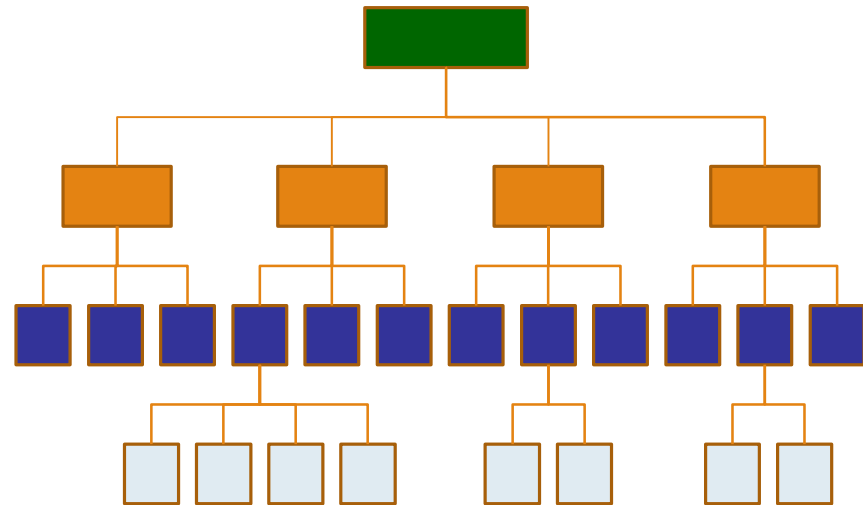
A hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables.

Work Breakdown Structure (continued)

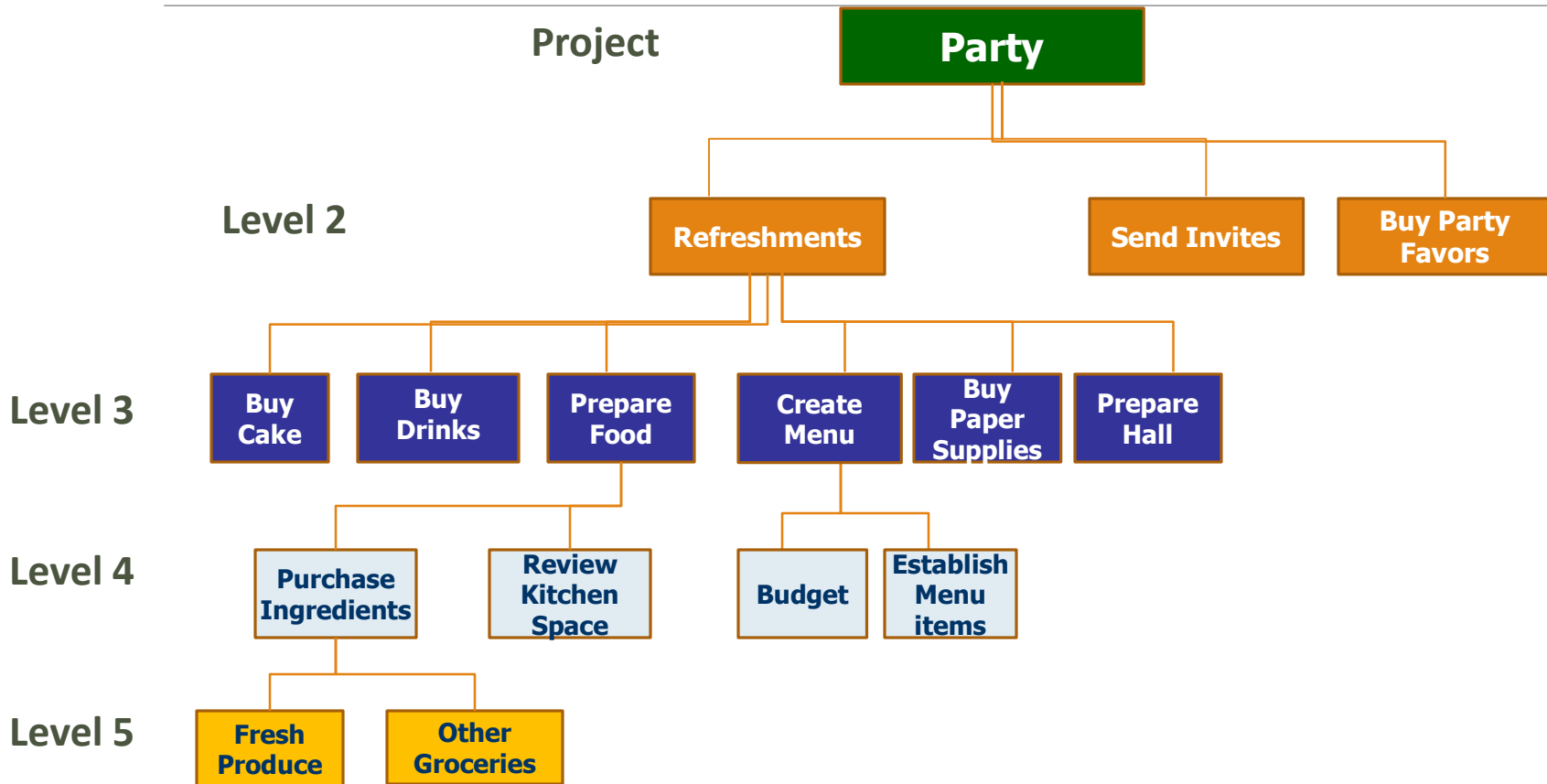
Gathers all of the work that needs to be done for the project.

Decomposes hierarchically the total scope of work of the project down to the smallest possible work package.

Each work package should have a resource and duration estimates.

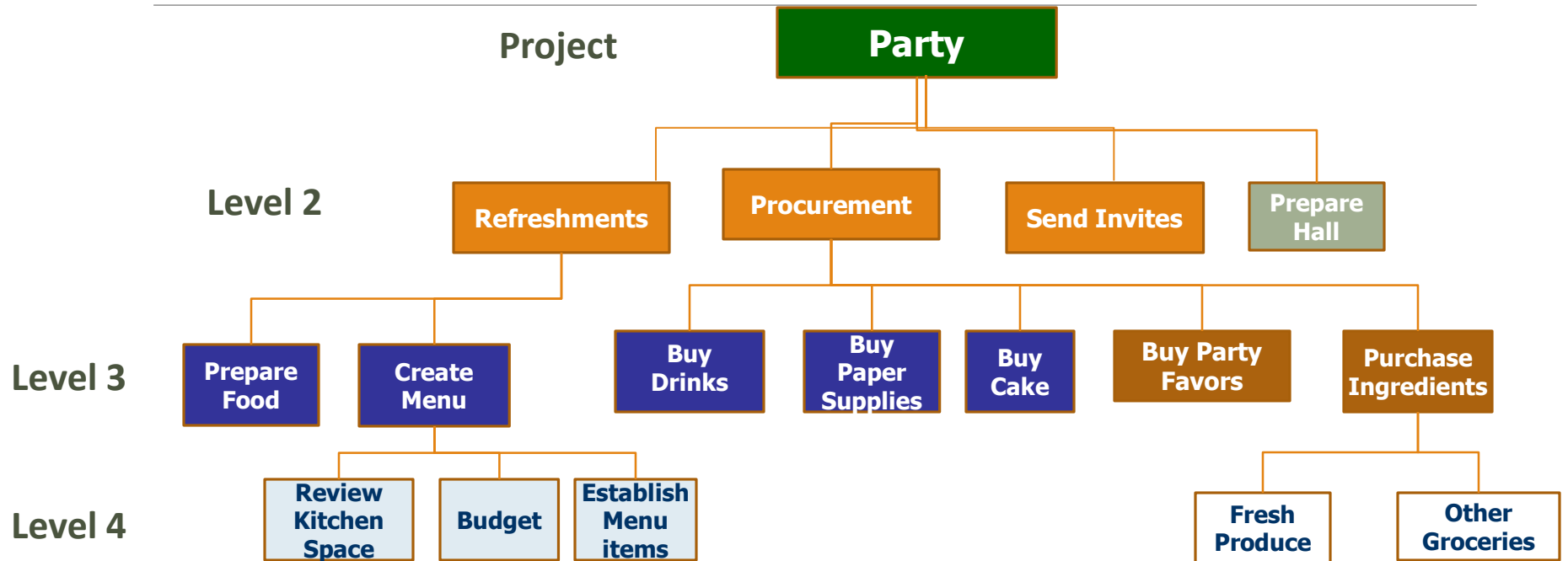


Decomposing the WBS



Decomposing the WBS

(continued)



Creating a WBS

Steps to take in creating a WBS:

- Create a list of work categories.
- Identify work packages or tasks that need to be completed.
- Assign the work packages to categories (or subcategories).
- Assign a unique identifier to each task.


The creation of work packages needs to make sense to the project and the team.

- for Software Implementation Project
- Project Management
- Product Requirements
 - 1.2.1 Software Requirements
 - 1.2.1.1 Draft Software Requirements
 - 1.2.1.2 Final Software Requirements
 - 1.2.1.3 Software Requirements Approval
 - 1.2.2 User Documentation
 - 1.2.2.1 Draft User Documentation
 - 1.2.2.2 Final User Documentation
 - 1.2.2.3 User Documentation Approval
 - 1.2.3 Training Program Materials
 - 1.2.3.1 Initial Training Requirements
 - 1.2.3.2 Initial Training Materials
 - 1.2.3.3 Trial Course Delivery
 - 1.2.4 Hardware
 - 1.2.4.1 Draft Hardware Requirements
 - 1.2.4.2 Final Hardware Requirements
 - 1.2.4.3 Hardware Requirements Approval
 - 1.2.5 Implementation & Future Support
- 1.3 Detail Software Design
 - 1.3.1 Initial Software Design
 - 1.3.2 Final Software Design
 - 1.3.3 Software Design Approval
- 1.4 System Construction
 - 1.4.1 Configured Software
 - 1.4.2 Customized User Documentation
 - 1.4.3 Customized Training Program Materials
 - 1.4.4 Installed Hardware
 - 1.4.5 Implementation & Future Support


What is the Purpose of the WBS?

To document and take all task down to the lowest level.
This is called Work Packages

Work Breakdown Structure Review

- ❑ **Create the WBS with your team.**
 - ❑ The WBS **gathers all of the work that needs to be done** for the project.
 - ❑ It should go down to the smallest possible work package.
 - ❑ **Identify all resources** necessary for task completion, including: Employees, Contractors/Consultants, Equipment, Technology and Facilities.
 - ❑ **Estimate task durations** as accurately as possible is key to a well designed WBS.
 - ❑ Duration is the actual amount of time the task needs to be complete – not when the resource can complete it.
- 

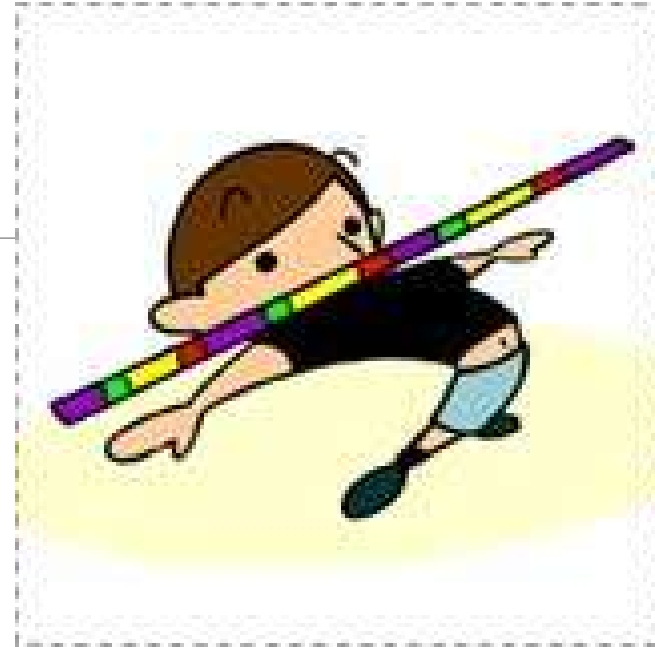
WBS Review- continued

- ❑ Each work package should have - resource, duration estimates, identify who is *responsible* and who is *accountable*.
 - ❑ Review initial resources and durations for any over allocation or under allocation of project team members.
 - ❑ Compare scope to the WBS:
 - Do all of your tasks directly address scope?
 - Are any tasks outside of scope?
 - ❑ Identify any poorly worded tasks.
 - ❑ Identify ambiguous or non-specific durations or resources.
- 

Let try it!

Let's plan a Superbowl party.

- ✓ 24 people (combination of friends and relatives)
- ✓ 4 people from out of town (staying the night)
- ✓ 6 kids
- ✓ 3 people with allergies



Break into small groups - 10 minutes to complete

- Brainstorm the different categories that will help your team identify and arrange the work that will need to be done.
- Share Results with the class

Example WBS - Smartsheet

			Task Name	Responsible	State	Status	Due Date	Comments
1			Q3 Marketing Team Objectives & Plan				09/30/14	
2			▣ Objectives					
3			Leads Generated - 2,000 (click for list)	Caroline	●	On Track		Link to monthly tracking sheet for trend details. Right click on a cell to hyperlink to other sheets, websites or to cells in other sheets.
4			Improve SEO traffic by 10%	Caroline	●	On Track		
5			Customer retention improvement by 2%	Mary	●	On Track	09/30/14	
6								
7			▣ Deliverables					
8			▣ Email Campaign				08/23/14	
9			Design email layout	Bob	●		08/15/14	Pushed out 4 days, draft attached
10			Review value	Mary			08/20/14	
11			New web page for special offer				08/20/14	
12			▣ Affiliate Referral Projects					
13			Determine which Affiliates to target					
14			Develop Materials					
15			Finish Pricing					
16			▣ Website Update					
17			Develop new Brand and Graphics	Bob	●	At Risk	07/15/14	Agency has not yet delivered graphics, 7/20
18			Rework Messaging	Caroline	●		08/31/14	
19			Update Website to new Brand				09/30/14	
20			▣ Blog and Social					
21			Set blog schedule and topic ideas					
22			Evaluate new FB feature for use					
23			Work with HR on social recruiting program					
24			▣ SEO Improvement					
25			Run a New Key Word Study					
26			Infuse Current Material with Words					
27			Increase Video and Picture Content					

Example WBS - Smartsheet

Account ? Help Search...

Home Basic Agile Project with Gantt Timeline

	At Risk	Task Name	Feature Type	Story Points	Durati...	Start	Finish	Status	Predecessors	Sprint	Assigned To	Comments
1		Learn how to use this template	Resources									
2												
3		AGILE PROJECT			24d	06/02/14	07/03/14	In Progress				
4		Sprints			24d	06/02/14	07/03/14	In Progress				
5		Sprint 1		85	11d	06/02/14	06/16/14	In Progress				
6		Feature 1	Security	8	1d	06/02/14	06/02/14	Complete		1	Team 1	
7		Task 1	Security		1d	06/02/14	06/02/14	At Risk				
8		Feature 2	Security	5	4d	06/02/14	06/05/14	Complete		1	Team 2	
9		Task 1	Security		4d	06/02/14	06/05/14	In Progress				
10		Task 2	Security		4d	06/02/14	06/05/14	In Progress				
11		Feature 3	Account Managemen	20	11d	06/02/14	06/16/14	Complete			Team 1	
15		Feature 4	Account Managemen	13	9d	06/03/14	06/13/14	Complete			Team 1	
19		Feature 5	Account Managemen	8	6d	06/05/14	06/12/14	Complete			Team 2	
21		Feature 6	Security	2	5d	06/03/14	06/09/14	Complete			Team 2	
24		Feature 7	Security	3	6d	06/02/14	06/09/14	Complete			Team 1	
26		Feature 8	Security	8	4d	06/07/14	06/11/14	Complete			Team 1	
28		Feature 9	Security	2	6d	06/04/14	06/11/14	Complete			Team 2	
30		Feature 10	Maintenance	13	6d	06/05/14	06/12/14	Complete			Team 2	
35		Bug 1	Maintenance	2	1d	06/03/14	06/03/14	Complete				
36		Bug 2	Maintenance	1	1d	06/04/14	06/04/14	Complete				
37		Sprint 2		21	5d	06/17/14	06/23/14	In Progress	5			
41		Sprint 3		0	1d	06/24/14	06/24/14	Not Started	37			
46		Sprint 4			7d	06/25/14	07/03/14	Not Started	41			
49		Backlog		0				Not Started				

Sharing Alerts Attachments (1) Comments Update Requests Web Forms Publish

Smartsheet – Contact Information

Brainstorm

How will you gather all of the tasks, resources required, and durations needed for a WBS?

What is the value to beginning the planning phase with a WBS?



HOW DO WE
CREATE A
SCHEDULE
THAT
EVERYONE
UNDERSTAND
S AND
FOLLOWS?

Build a
schedule

Build a Schedule

When using software to generate the schedule, initial set up of resources is key to success.

Things To Consider When Building A Schedule. Start with a calendar and remove all non-working dates.

Weekends * Holidays * Company Meetings

Review task durations and make sure they are all in the same units

- ✓ Minutes
 - ✓ Hours
 - ✓ Days
- 

Things To Consider When Building A Schedule (continued)

- Determine how many working hours are in one day.
 - Does an 8 hour day reflect 8 hours worth of actual work?

- Review each resource for time limitations.
 - Part time employees
 - Employees assigned to multiple projects
 - Scheduled vacations

- Make sure to set up each resource according to availability.



Build A Schedule - Review

- ❑ Review that each task has a resource or responsible party assigned.

- ❑ Review for team allocation
 - Are some team members responsible for too much?
 - Are there team members who do not have enough to do?
 - Can you reallocate as needed?

Finalize A Schedule



HOW CAN
WE
MANAGE
ALL THE
CHANGES
TO A
PROJECT?

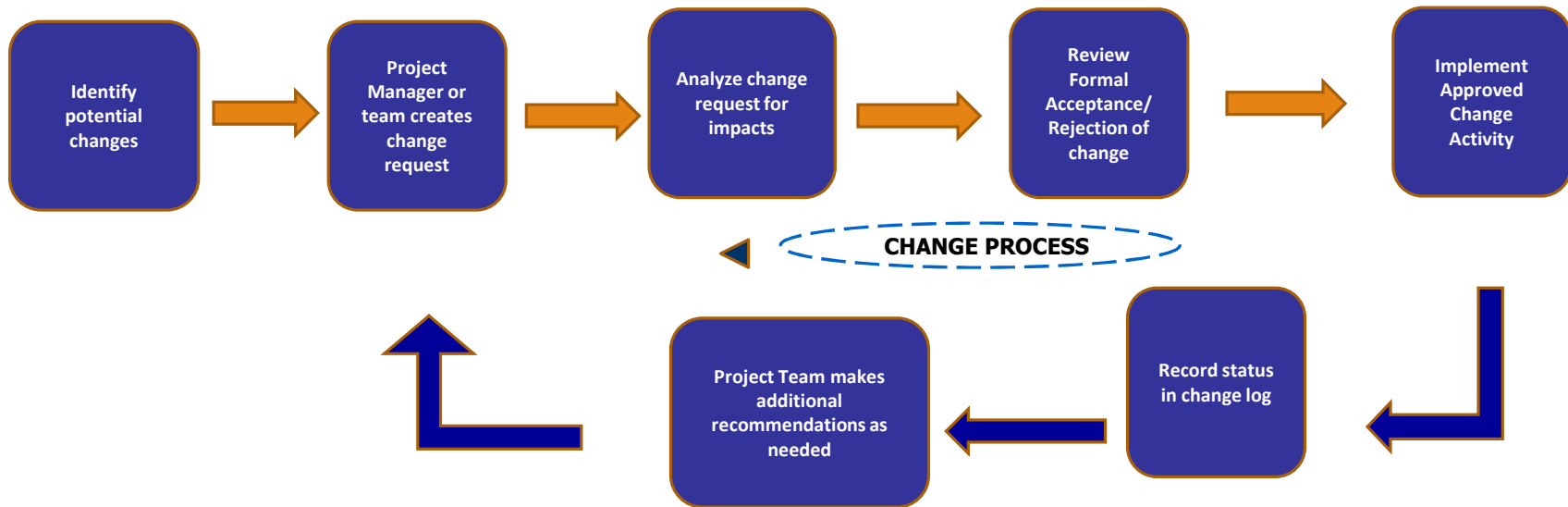
Change
Management

Monitoring & Controlling Change Management –


Changes will occur in any project.

- ❑ Having a solid change management plan and process aids in dealing with changes.
- ❑ Change requests can come from:
Customers - Team members - Outside influences – Vendors.
- ❑ Not all changes are bad.
- ❑ It is important to assess all changes for the overall impact to a project:
Cost – Schedule - Impact to team - Impact to organization or other projects

Change Management Process



Communicating Change Management

- ❑ Set a specific meeting for the team to evaluate changes.
 - ❑ Have a plan for communicating changes.
 - ❑ At the outset of a project, let customers know that a formal, change management process is in effect.
 - ❑ Changes can be accepted, rejected or tabled for further information or customer input.
 - ❑ Determine who can communicate changes to the customer. Communicate to the customer regularly.
- 

HOW CAN
WE MAKE
SURE
EVERYONE
INVOLVED
WITH THE
PROJECT IS
KEEP UP TO
SPEED?

Communication Management

Project Communication

Communication ... begins and ends with the project manager!

“Communication ranks high among the factors leading to the success of a project. Specifically, what is required is constant, effective communication among everyone in the project.”*

*PMBOK, pg. 305



Creating a Communication Plan

A communication plan will share:

- The right information
- With the right people
- At the right time

Communication must be planned. Otherwise, the flow of information becomes unmanageable.

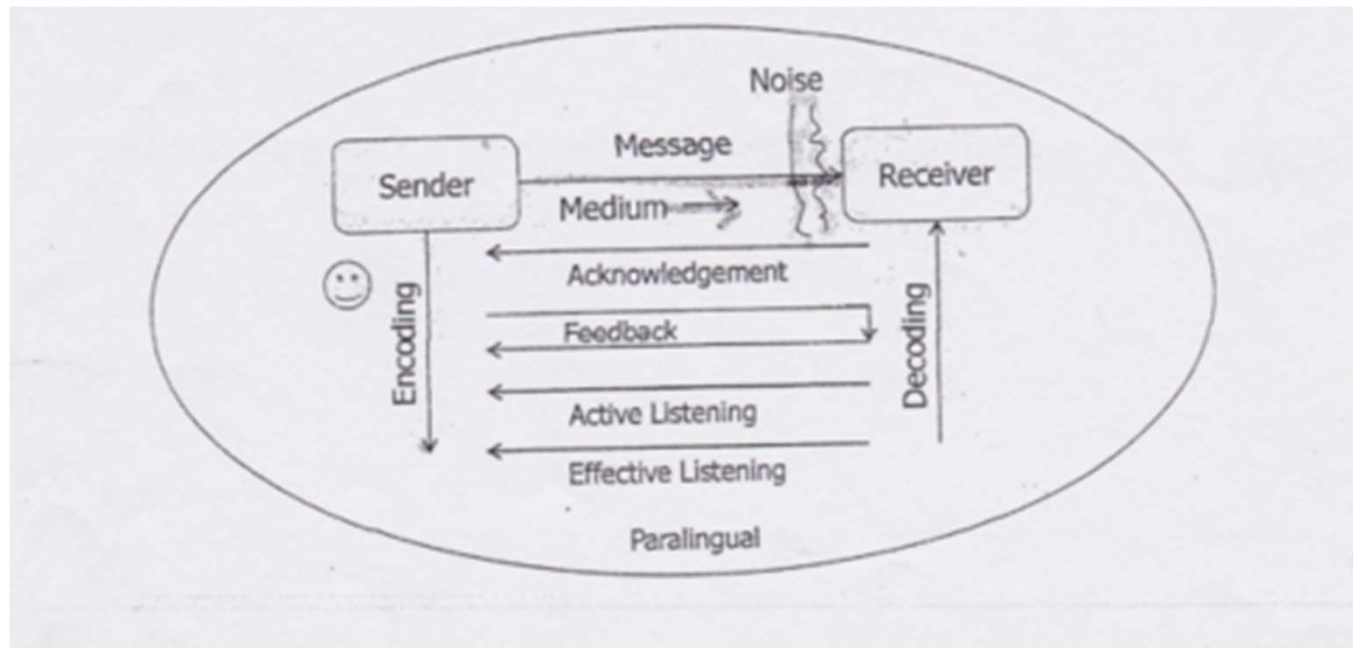
Oversharing or under sharing information will lead to project issues.



Communication...it's not easy!



Communication Model



Stakeholder Management

Identify stakeholders

- Customers
- Sponsors
- Team members
- Anyone who cares about the project and/or it's outcome

Stakeholders will have varied interests and therefore, different communication needs,

Communication Matrix - Sample

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Kickoff Meeting	Introduce the project team and the project. Review project objectives and management approach.	Face to Face	Once	Project Sponsor Project Team All SH	Project Manager	Agenda Meeting Minutes	Soft copy archived on project SharePoint site and project web site
Project Team Meetings	Review status of the project with the team.	Face to Face Conf Call	Weekly	Project Team	Project Manager	Agenda Meeting Minutes Project schedule	Soft copy archived on project SharePoint site and project web site
Technical Design Meetings	Discuss and develop technical design solutions for the project.	Face to Face	As Needed	Project Technical Staff	Technical Lead	Agenda Meeting Minutes	Soft copy archived on project SharePoint site and project web site
Monthly Project Status Meetings	Report on the status of the project to management.	Face to Face Conf Call	Monthly	PMO	Project Manager	Slide updates Project schedule	Soft copy archived on project SharePoint site and project web site
Project Status Reports	Report the status of the project including activities, progress, costs and issues.	Email	Monthly	Project Sponsor Project Team All SH PMO	Project Manager	Project Status Report Project schedule	Soft copy archived on project SharePoint site and project web site

Adapted from projectmanagementdocs.com

Performance Reporting

Different reporting types:

- Oral
- Written
- Informal
- Formal

Different reporting avenues:

- Internal vs. External
- Vertical vs. Horizontal
- Official vs. Unofficial

Performance Reporting (continued)

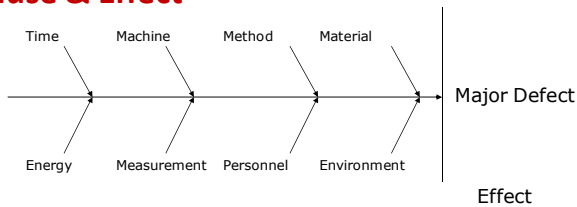
Schedule	Report	Give
Schedule appropriate frequency when communicating with all stakeholders.	For executive status, do not report more frequently than needed. <ul style="list-style-type: none">• Make sure you have quality information to share.	Give specific dates and times when asking team members to report to you.



Tools to use in Performance Reporting

Some Sample Charts

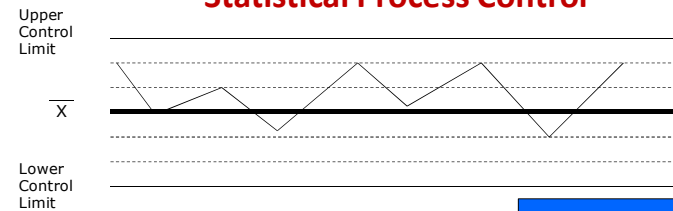
Cause & Effect



Help Analyze Problems

PMBOK® Guide, p. 208

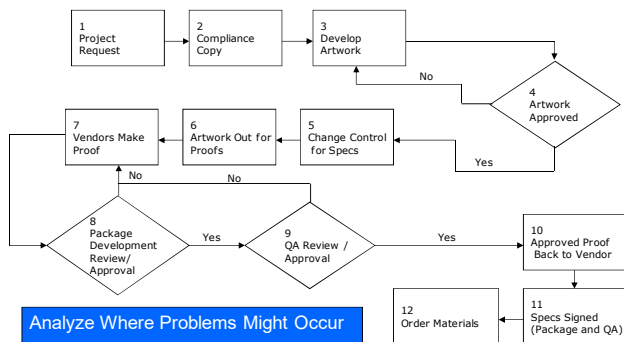
Statistical Process Control



X = average
 UCL = upper range of acceptable data point
 LCL = lower range of acceptable data point
 Note: Outside UCL and LCL indicates out of control or unstable process

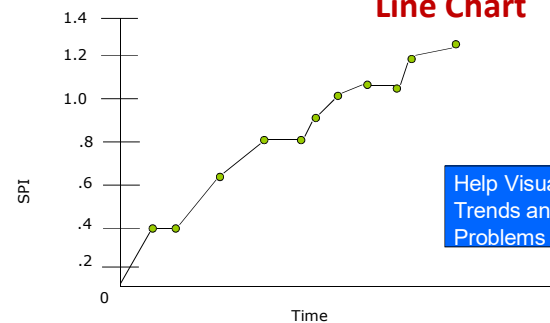
Reveals the Stability of a Process

Flowchart



Analyze Where Problems Might Occur

Line Chart

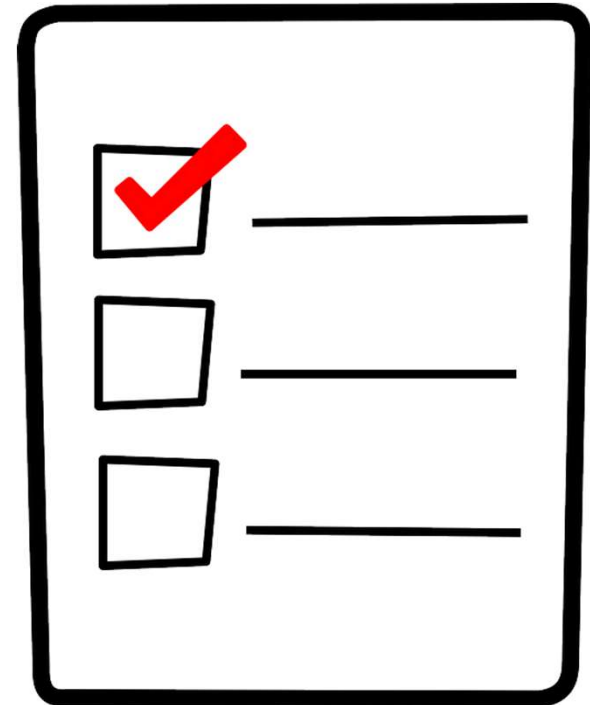


Help Visualize Potential Trends and Potential Problems

Let try it!

Do it or it will FADE

What are two things you learned today that you will commit to trying this next month?



A checklist form with three items. The first item is checked with a red checkmark, and the other two are unchecked.

<input checked="" type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

Workshop Complete



Thank you for sharing with me today!

Debra Pelletier, PMP