Managing Multiple Projects Successfully
For Small Business Owners
Thank you to our Sponsors
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Education & Credentials
San Jose State University
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Master of Science in Recreation Administration
Emphasis Public Administration

Bachelor of Science in Recreation Administration
Minor in Marketing

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
Creating a Work Breakdown Structure (WBS)

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

Project

Level 2
- Refreshments
- Send Invites
- Buy Party Favors

Level 3
- Buy Cake
- Buy Drinks
- Prepare Food
- Create Menu
- Buy Paper Supplies
- Prepare Hall

Level 4
- Purchase Ingredients
- Review Kitchen Space
- Budget
- Establish Menu Items

Level 5
- Fresh Produce
- Other Groceries
Decomposing the WBS (continued)

Level 2
- Refreshments
- Procurement
- Send Invites
- Prepare Hall

Level 3
- Prepare Food
- Create Menu
- Buy Drinks
- Buy Paper Supplies
- Buy Cake
- Buy Party Favors
- Purchase Ingredients

Level 4
- Review Kitchen Space
- Budget
- Establish Menu items
- Fresh Produce
- Other Groceries
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.*
What is the Purpose of the WBS?

To document and take all tasks 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

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Responsible</th>
<th>State</th>
<th>Due Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3 Marketing Team Objectives &amp; Plan</td>
<td></td>
<td></td>
<td>09/30/14</td>
<td></td>
</tr>
<tr>
<td><strong>Objectives</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leads Generated - 2,000 (click for list)</td>
<td>Caroline</td>
<td>On Track</td>
<td></td>
<td>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.</td>
</tr>
<tr>
<td>Improve SEO traffic by 10%</td>
<td>Caroline</td>
<td>On Track</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer retention improvement by 2%</td>
<td>Mary</td>
<td>On Track</td>
<td>09/30/14</td>
<td></td>
</tr>
<tr>
<td><strong>Deliverables</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Campaign</td>
<td></td>
<td></td>
<td>08/23/14</td>
<td></td>
</tr>
<tr>
<td>Design email layout</td>
<td>Bob</td>
<td>On Track</td>
<td>08/15/14</td>
<td>Pushed out 4 days, draft attached</td>
</tr>
<tr>
<td>Add a discussion comment</td>
<td>Bob</td>
<td></td>
<td>08/15/14</td>
<td>Pushed out 4 days, draft attached</td>
</tr>
<tr>
<td>New web page for special offer</td>
<td>Mary</td>
<td></td>
<td>08/20/14</td>
<td></td>
</tr>
<tr>
<td><strong>Affiliate Referral Projects</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Determine which Affiliates to target</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop Materials</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finish Pricing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Website Update</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Develop new Brand and Graphics</td>
<td>Bob</td>
<td>At Risk</td>
<td>07/15/14</td>
<td>Agency has not yet delivered graphics, 7/20</td>
</tr>
<tr>
<td>Rework Messaging</td>
<td>Caroline</td>
<td>On Track</td>
<td>08/31/14</td>
<td></td>
</tr>
<tr>
<td>Update Website to new Brand</td>
<td></td>
<td></td>
<td>09/30/14</td>
<td></td>
</tr>
<tr>
<td><strong>Blog and Social</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set blog schedule and topic ideas</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluate new FB feature for use</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work with HR on social recruiting program</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>SEO Improvement</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Run a New Key Word Study</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Infuse Current Material with Words</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Increase Video and Picture Content</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Example WBS - Smartsheet

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Feature Type</th>
<th>Story Points</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Status</th>
<th>Predecessors</th>
<th>Assigned To</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGILE PROJECT</td>
<td>Security</td>
<td>24d</td>
<td>06/02/14</td>
<td>07/03/14</td>
<td>In Progress</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sprints</td>
<td>Security</td>
<td>24d</td>
<td>06/02/14</td>
<td>07/03/14</td>
<td>In Progress</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sprint 1</td>
<td>Security</td>
<td>85</td>
<td>06/02/14</td>
<td>09/18/14</td>
<td>In Progress</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 1</td>
<td>Security</td>
<td>8</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 1</td>
<td>Security</td>
<td>1d</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 2</td>
<td>Security</td>
<td>5</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task 1</td>
<td>Security</td>
<td>4d</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 3</td>
<td>Account Management</td>
<td>11d</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 4</td>
<td>Account Management</td>
<td>9d</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 5</td>
<td>Account Management</td>
<td>6d</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 6</td>
<td>Security</td>
<td>2</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 7</td>
<td>Security</td>
<td>3</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 8</td>
<td>Security</td>
<td>8</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 9</td>
<td>Security</td>
<td>2</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feature 10</td>
<td>Maintenance</td>
<td>13d</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bug 1</td>
<td>Maintenance</td>
<td>2</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bug 2</td>
<td>Maintenance</td>
<td>1</td>
<td>06/02/14</td>
<td>Complete</td>
<td>1 Team 1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sprint 2</td>
<td></td>
<td>21</td>
<td>06/17/14</td>
<td>In Progress</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sprint 3</td>
<td></td>
<td>0</td>
<td>06/24/14</td>
<td>Not Started</td>
<td>37</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sprint 4</td>
<td></td>
<td>7d</td>
<td>07/03/14</td>
<td>Not Started</td>
<td>41</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 UNDERSTANDS AND FOLLOWS?
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?
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

1. Identify potential changes
2. Project Manager or team creates change request
3. Analyze change request for impacts
4. Review Formal Acceptance/Rejection of change
5. Implement Approved Change Activity
6. Record status in change log
7. Project Team makes additional recommendations as needed

Change Process

Identify potential changes → Project Manager or team creates change request → Analyze change request for impacts → Review Formal Acceptance/Rejection of change → Implement Approved Change Activity → Record status in change log → Project Team makes additional recommendations as needed → Analyze change request for impacts → Review Formal Acceptance/Rejection of change → Implement Approved Change Activity → Record status in change log → Project Team makes additional recommendations as needed → Analyze change request for impacts → Review Formal Acceptance/Rejection of change → Implement Approved Change Activity
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 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
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 its outcome

Stakeholders will have varied interests and therefore, different communication needs,
## Communication Matrix - Sample

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

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)

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Report</th>
<th>Give</th>
</tr>
</thead>
</table>
| Schedule appropriate frequency when communicating with all stakeholders. | For executive status, do not report more frequently than needed.  
  - 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**

- Time
- Machine
- Method
- Material
- Energy
- Measurement
- Personnel
- Environment

**Major Defect**

**Effect**

PMBoK® Guide, p. 208

**Flowchart**

1. Project Request
2. Compliance Copy
3. Design/Design Change
4. Develop Artwork
5. Change Control for Specs
6. Artwork Out for Proofs
7. Lower Control Limit
8. Upper Control Limit
9. Analyze Where Problems Might Occur

**Statistical Process Control**

- X = average
- UCL = upper range of acceptable data point
- LCL = lower range of acceptable data point

Help Analyze Problems

Reveals the Stability of a Process

Note: Outside UCL and LCL indicates out of control or unstable process

**Line Chart**

- Help Visualize Potential Trends and Potential Problems

- SPI
- Time
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?
Workshop Complete

Thank you for sharing with me today!

Debra Pelletier, PMP