DEFINITION

PROJECT

- “A project is a temporary endeavor undertaken to create a unique product, service, or result.”

- All quotes in this presentation are from the PMBOK Guide, 6th ed.
DEFINITION
PROJECT MANAGER

• “The person assigned... to lead the team that is responsible for achieving the project objectives”

• The Project Manager cannot work alone - they can only succeed by working well with the project team and communicating well with the sponsor.

• The job of the project manager is to LEAD a team and to COMMUNICATE with sponsors/stakeholders
PROJECT MANAGEMENT PROCESS GROUPS

- INITIATING
  - Defining the project, and gaining authorization
- PLANNING
  - Establish full scope, refine objectives, define actions to take
- EXECUTING
  - Processes to complete the work defined in planning
- MONITORING & CONTROLLING
  - Processes to track, review, and regulate progress
  - Identify and Initiate necessary changes to stay on track with requirements
- CLOSING
  - Formal closure of a project, phase, or contract
DEFINITION
Sponsor

"Person or group who provides resources and support for the project... and is accountable for enabling success"
DEFINITION

STAKEHOLDERS

“An individual, group, or organization that
• may affect,
• be affected by, or
• perceive itself to be affected by
a decision, activity, or outcome of
a project...”

Types of Stakeholders:
- Key Stakeholders
- Project Team
- Other Stakeholders
“...used to create the project charter... and ... to determine whether the expected outcomes of the project justify the required investment.”

Parts:

- Identify business need
- Map outcomes that fulfill the need
- Identify target outputs to show you met the outcomes
DEFINITION

OUTCOMES

- Not a PMBOK term, but it is common and required for policy (which we’ll get to soon)

- OutCOME - why? (keep asking why until you finally get back to core business objectives like mission, vision, strategic plan)

- Output (or targets or goals) - how will you measure whether you meet your outcomes?
DEFINITION
DELIVERABLE

• “...any unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a process, phase, or project.”

• A THING you DELIVER to SHOW you’re ON TRACK

Recipe from Miss Catharine Baker’s Receipt Book
DEFINITON

REQUIREMENT

• “Condition or capability that is necessary to be present in a produce, service, or result to satisfy a business need”

DEFINITON

SCOPE

• The boundaries of your project: What it does
  • And what it does NOT do
  • Be sure to address what is out of scope, especially any assumptions that may exist for your stakeholders or requirements that exist that you cannot address
DEFINITION

PROJECT CHARTER

• “A document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.”
DEVELOPING THE PROJECT CHARTER

INPUTS, TOOLS & TECHNIQUES TO USE

INPUTS

- Business case
- Agreements
- Enterprise Environmental Factors (Culture/Norms)
  - Ex: Risk aversion?
- Organizational Process Assets (Policies, templates, similar projects)
  - Ex: Policy: IT PPS 4.10
  - Ex: Project Charter Template

TOOLS & TECHNIQUES

- Expert Judgment
- Data Gathering
  - Brainstorm
  - Focus Groups
  - Interviews
- Interpersonal and team skills
  - Conflict Management
  - Facilitation
  - Meeting management
- Meetings

P. 75 PMBOK
FIELD TRIP

- Go to [IT PPS 4.10](#)
- Locate [IT Templates for Project Management](#)
  - Search [TXState.edu](#) for ITAC Project Management Templates
# Project Charter

<table>
<thead>
<tr>
<th>Project Name:</th>
<th>Sister’s wedding cake</th>
<th>Project Title:</th>
<th>#1!</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor/Key Stakeholder:</td>
<td>Sister</td>
<td>Charter Date:</td>
<td>5/1/19</td>
</tr>
<tr>
<td>Stakeholder Department:</td>
<td>Family</td>
<td>Associated Project(s):</td>
<td>Sister’s wedding</td>
</tr>
<tr>
<td>Executive Sponsor:</td>
<td>Mom</td>
<td>Project Team:</td>
<td>3 (see policy)</td>
</tr>
<tr>
<td>Mandate:</td>
<td>☐ No ☑ Yes</td>
<td>If yes, date required:</td>
<td>Click here to set sister’s date.</td>
</tr>
</tbody>
</table>

## 1. Project Goal/Description:

What is the purpose and/or the business need for this project? What business benefits will be achieved?

**Description:** Baking a wedding cake for sister’s wedding. **Business Need:** Fulfill a childhood dream.

## 2. Scope Definition and Project Outcomes/Deliverables & Measures of Success:

What work will be included as part of this project? What work will not be included as a part of this project? How will the project be defined as complete? What are the high level deliverables?

- **In Scope:**
  - Building the cake, decorating the cake, delivering the cake.
  - Out of scope: baking cake, purchasing confectioneries, purchasing and delivery, consultant fees, etc.

- **Overall Goal:** To complete the project.

- **Major Deliverable:** 100% of the project will be delivered.

- **Measures of Success:**
  - The project will be completed on time and within budget.
  - The project will meet all of the requirements of the users.

## 3. Project Team/Key Stakeholders/Roles:

Who are the key people and/or areas that will be impacted in this project? If the project requests resources from other departments/teams, a representative from each should be listed.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role on Project Team</th>
<th>Department</th>
<th>Notes/Contact Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sister</td>
<td>Sponsor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mom</td>
<td>Money-bag</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Diana</td>
<td>Project Manager and Baker</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Andrea</td>
<td>Delivery guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Church lady</td>
<td>Helps with delivery and setup</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## 4. Organizational Groups Impacted:

Who are the key people and/or areas that will be impacted by the work on this project, or by the work and results of this project? List the user groups for this project (i.e., students).

- Wedding attendants
- Church workers

## 5. Software/Databases Impacted:

What existing applications or databases will be impacted by the work on this project, or by the results of this project? What integration points will be necessary with existing systems for this project to be successful?

**N/A**

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6. **Ownership**

If this project involves the implementation of a software product, what department will be responsible for the administrative management (such as adding users, removing users, configuration changes)? What department will be responsible for the technical support of this project (maintenance, upgrades, code changes, etc.)?

Diana will own the cake and be responsible for support/adjustment of the cake after delivery (e.g., decorations are messed up during delivery). Once wedding begins, cake is in final state.

7. **Security/Risk Assessment**

What security risks are associated with implementation of this project? Who will be responsible for addressing these risks and how?

**N/A**

8. **Scheduling Requirements (Anticipated Timeline/Milestones)**

Is there an externally or internally driven completion date (or other limitations) for this project? If so, please indicate and explain.

- **Wedding Dates:**
  - 5/28/2019
  - Must have basic recipe no later than 2/26, so that allergy information can be included on invitation.

9. **Funding Requirements**

Will funding be required for the purchase of services or products (software/hardware) for the project? If so, provide a summary of estimated costs associated with the objectives of this project. This is intended to present probable funding requirements.

**Estimated Budget:** $100

**Authorization/Charter Approval:**

Type the name of each Project Team Member and their title and role for electronic signatures.

- **Sister:** Sponsor
- **Mom:** Money-bag
- **Diana:** Project Manager and Baker
- **Andrea:** Delivery guy
- **Church lady:** Helps with delivery and setup

**Attachments**

- Include the name of the document and a description

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Page 1 of 2
DEFINITION
RISKS AND CONTINGENCIES

- Knowable and Unknowable Risks
- Contingencies/Responses to risk:
  - Escalate
  - Avoid
  - Transfer
  - Mitigate
  - Accept
SCHEDULE DEFINITION

WBS: WORK BREAKDOWN STRUCTURE

• “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”

• Start with aspects of scope or deliverables, break them down into “work packages - the work defined at the lowest level of the WBS for which cost and duration are estimated and managed”.
**SCHEDULE DEFINITION**

**DEPENDENCIES**

- A logical relationship between two tasks when one task must happen before/after/alongside another

- You must bake the cake before your sister can taste it

- Related terms: Predecessor
  - Network Diagram
  - Network Path
  - Critical Path
MILESTONE SCHEDULE DEFINITION

• “A significant point or event in a project...”

• Map these into your schedule!
  
  • A diamond is traditional marker for a milestone on a visual calendar

• A TIME/EVENT to CHECK IN with team and stakeholders to SHOW/CELEBRATE you’re ON TRACK
SCHEDULE DEFINITION

GANTT CHART

- “A bar chart of schedule information where activities are listed on the vertical axis, dates are shown on the horizontal axis, and activity durations are shown as horizontal bars placed according to start and finish dates”

- Basically a visualization of the schedule and a reporting mechanism.

```
  Task A
  Task B
  Task C
  Task D
Milestone

January February March April
```
ACTIVITY
CREATE WBS FOR CAKE
WBS for Sister's Cake

Recipe
- Final
- Adjust

Baking
- Buy Ingredients
- Bake Test
- Bake Final

Testing
- Schedule
- Taste Test

Deliver Final Cake
## WBS INTO PROJECT

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Predecessors</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cake</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recipe</td>
<td>18 days</td>
<td>Thu 5/2/19</td>
<td>Mon 5/27/19</td>
<td></td>
</tr>
<tr>
<td>Find recipe</td>
<td>17 days</td>
<td>Thu 5/2/19</td>
<td>Fri 5/24/19</td>
<td></td>
</tr>
<tr>
<td>Get approval of recipe</td>
<td>5 days</td>
<td>Thu 5/2/19</td>
<td>Wed 5/8/19</td>
<td></td>
</tr>
<tr>
<td>Adjust recipe</td>
<td>7 days</td>
<td>Thu 5/9/19</td>
<td>Fri 5/17/19</td>
<td>3</td>
</tr>
<tr>
<td><strong>Baking</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buy ingredients</td>
<td>6 days</td>
<td>Mon 5/20/19</td>
<td>Mon 5/27/19</td>
<td></td>
</tr>
<tr>
<td>Bake a test cake</td>
<td>1 day</td>
<td>Mon 5/20/19</td>
<td>Mon 5/20/19</td>
<td>4</td>
</tr>
<tr>
<td>Bake final cake</td>
<td>1 day</td>
<td>Tue 5/21/19</td>
<td>Tue 5/21/19</td>
<td>7</td>
</tr>
<tr>
<td>Deliver cake</td>
<td>1 day</td>
<td>Mon 5/27/19</td>
<td>Mon 5/27/19</td>
<td>13,5</td>
</tr>
<tr>
<td><strong>Testing</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule taste test</td>
<td>14 days</td>
<td>Thu 5/2/19</td>
<td>Tue 5/21/19</td>
<td></td>
</tr>
<tr>
<td>Taste test</td>
<td>0 days</td>
<td>Tue 5/21/19</td>
<td>Tue 5/21/19</td>
<td>8</td>
</tr>
<tr>
<td>ID</td>
<td>Task Name</td>
<td>Duration</td>
<td>Start</td>
<td>Finish</td>
</tr>
<tr>
<td>----</td>
<td>--------------------</td>
<td>----------</td>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>1</td>
<td>Cake</td>
<td>18 days</td>
<td>Thu 5/2/19</td>
<td>Mon 5/27/19</td>
</tr>
<tr>
<td>2</td>
<td>Recipe</td>
<td>17 days</td>
<td>Thu 5/2/19</td>
<td>Fri 5/24/19</td>
</tr>
<tr>
<td>3</td>
<td>Find recipe</td>
<td>5 days</td>
<td>Thu 5/2/19</td>
<td>Wed 5/8/19</td>
</tr>
<tr>
<td>4</td>
<td>Get approval of recipe</td>
<td>7 days</td>
<td>Thu 5/9/19</td>
<td>Fri 5/17/19</td>
</tr>
<tr>
<td>5</td>
<td>Adjust recipe</td>
<td>3 days</td>
<td>Wed 5/22/19</td>
<td>Fri 5/24/19</td>
</tr>
<tr>
<td>6</td>
<td>Baking</td>
<td>6 days</td>
<td>Mon 5/20/19</td>
<td>Mon 5/27/19</td>
</tr>
<tr>
<td>7</td>
<td>Buy ingredients</td>
<td>1 day</td>
<td>Mon 5/20/19</td>
<td>Mon 5/20/19</td>
</tr>
<tr>
<td>8</td>
<td>Bake a test cake</td>
<td>1 day</td>
<td>Tue 5/21/19</td>
<td>Tue 5/21/19</td>
</tr>
<tr>
<td>9</td>
<td>Bake final cake</td>
<td>1 day</td>
<td>Mon 5/27/19</td>
<td>Mon 5/27/19</td>
</tr>
<tr>
<td>10</td>
<td>Deliver cake</td>
<td>0 days</td>
<td>Mon 5/27/19</td>
<td>Mon 5/27/19</td>
</tr>
<tr>
<td>11</td>
<td>Testing</td>
<td>14 days</td>
<td>Thu 5/2/19</td>
<td>Tue 5/21/19</td>
</tr>
<tr>
<td>12</td>
<td>Schedule taste test</td>
<td>3 days</td>
<td>Thu 5/2/19</td>
<td>Mon 5/6/19</td>
</tr>
<tr>
<td>13</td>
<td>Taste test</td>
<td>0 days</td>
<td>Tue 5/21/19</td>
<td>Tue 5/21/19</td>
</tr>
</tbody>
</table>
# PROJECT COMMUNICATION PLAN

<table>
<thead>
<tr>
<th>Stakeholder/Audience</th>
<th>Owner of communication</th>
<th>Method of communication</th>
<th>Frequency or date</th>
<th>Content of Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sister</td>
<td>Baker (Dianna)</td>
<td>Verbally</td>
<td>Weekly (at weekly dinners)</td>
<td>How it’s going - sample cake if available</td>
</tr>
<tr>
<td>Mother of bride</td>
<td>Budget person (Dianna)</td>
<td>In writing via email</td>
<td>At any and all changes of budget</td>
<td>Current updated budget</td>
</tr>
<tr>
<td>Attendees</td>
<td>Sister</td>
<td>Insert into the invitation</td>
<td>No later than 6 weeks before wedding - 2 weeks notice for printing</td>
<td>Allergy content of cake (must have final recipe)</td>
</tr>
</tbody>
</table>
Alkek Library - FY2020 Budget Preparation
Equipment/Software/Service/Other M&O Request

Requestor Completes Items Below

- Requesting Department Lead(s)
- Requesting Team/Unit(s)
- Library staff involved in request
- List of Potential Users
- List of Potential Use
- Level of Use (1, 2, 3, 4, or 5, 5 being highest) or Budget Estimate
- Additional information (if you have worked with a vendor on the cost estimate, please provide contact information (name, phone, email))
- Brief Justification of Potential Impact
- Updated Timeline & Notes if applicable
PROJECT ESTIMATING
4 METHODS WITH EXAMPLES

• Analogous estimating (use previous projects or components - ex: my last wedding cake cost around $500 to make)

• Parametric estimating (use per-person or per-square foot costs to estimate - ex: a 500-person wedding cake cost $500, so a 100-person wedding cake may cost about $100)

• Bottom-up estimating (use cost of ingredients and preferred profit to estimate)

• 3-point estimating (mathematical formula you use with 3 estimates you get from experts: M: most likely cost, O: an optimistic cost, and P: a pessimistic cost: estimate=(O+4M+P)/6)
“Closing Project or Phase is the process of finalizing all activities for the project, phase, or contract. The key benefits of this process are the project for phase information is archived, the planned work is completed, and organization team resources are released to pursue new endeavors.”

Outcomes of presentation.
- 16 attendees discussed recent research by an undergrad student presenter, fulfilling goal of promoting undergraduate research
- Student deposited their presentation into the IR, fulfilling the goal of teaching the IL Frame: “Scholarship as Conversation”
INPUTS, TOOLS & TECHNIQUES, AND OUTPUTS
OF PROCESS OF PROJECT CLOSURE

**INPUTS:**
- Charter and Business Case
- Requirements
- Product/Event/Service Outputs
- Issues/Lessons Learned/etc
- Agreements

**TOOLS AND TECHNIQUES:**
- Expert Judgment
- Data Analysis
- Meetings

**OUTPUTS:**
- Project document updates (Lessons Learned)
- Final Product/service/result transition
- Final report
- Updates to any Policies or OPAs
HOW CAN I LEARN MORE??

- Check out the PMBOK, 6th edition from the library

- [lynda.com](http://lynda.com) has 125 courses on Project Management for self-paced learning in concepts and tools

- Career training from [txstate.edu](http://txstate.edu)'s partnership with Ed2Go:
  - Bonus: The hours in Ed2Go count toward official project management training hours*

- Learn how to become a CAPM® or PMP® through PMI

  - Project Management Institute or [ProjectManagement.com](http://ProjectManagement.com)
OR CONTACT YOUR FAVORITE LOCAL PMP®

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