

Administrative Professional Training

**Project Management Best Practices
and the Tools You Already Have**

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Advancement Administrative
Professionals Training Program

Session Outline

KEY CONCEPTS

- What is Project Management
- Project Management Best Practices
- Project Gotchas!
- Project Management Tools
- Microsoft To Do



What is a project?

PMI (Project Management Institute) defines a project as:

“[A] temporary endeavor undertaken to create a unique product, service or result.”

- A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources.
- A project is unique in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal.

What is a “project” for you?

Projects vs. things that need to get done

- Not all work activities require project management
- You will need to define metrics for an “official project” versus something that just needs to get done
- Typically, the metrics used are based around budget or hours of internal effort



What is a project management?

Definition: Project management is the discipline of planning, organizing, and executing a project to achieve specific goals and objectives.

- Involves overseeing tasks, resources, timelines, and budgets

PMI (Project Management Institute) defines a project management as:

“[T]he application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.”

Project management processes fall into five groups:

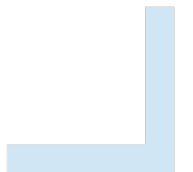
1) Initiating 2) Planning 3) Executing 4) Monitoring and Controlling 5) Closing



Benefits of Project Management

KEY POINTS

- Higher likelihood of project success
- Improved efficiency and productivity
- Enhanced communication and collaboration
- Better resource allocation and risk management

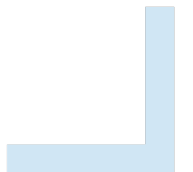


Best Practices

Before you get started, ensure that a project is necessary.

Questions to ask:

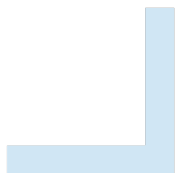
- What is the problem you are trying to solve, and does it have a clear end goal?
- Does everyone agree that this problem is “a problem”?
- Would a SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis be helpful in defining your project?
- Has someone else already attempted or solved this problem somewhere else? Can you “borrow” from their work and learn what was the result and why was it successful / not successful?



Best Practices

OVERVIEW

- Define project objectives and scope clearly
- Develop a comprehensive project plan
- Establish clear roles and responsibilities
- Create a realistic timeline and schedule
- Implement effective communication channels
- Monitor and track project progress
- Manage risks and issues proactively
- Foster a culture of collaboration and teamwork
- Conduct regular project reviews and lessons learned



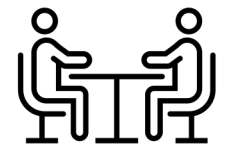
Define the Scope and Objectives

- **Scope:** Defines the boundary of the project
- **Objectives:** What do you hope to achieve?
- Make sure you understand the “real” objectives
- Understand who the stakeholders are, what they expect to be delivered and enlist their support
- **Technique:** Project Charter, Project Brief or Project Plan
- **PRO TIP!** Once you've defined the scope and objectives, get the stakeholders to review and agree to them.



Define the Deliverables and Activities

- **Deliverable** (a noun): What must be produced?
- **Activity** (a verb): What work needs to get done to create the deliverable?
- Always try to break down a project in manageable pieces
- **PRO TIP!** Key stakeholders should review and agree to the definition of deliverables to be delivered.



Project Planning

- Organize your project into clear phases or task groups
- Consider tools to organize and manage the project
- Use milestones to call attention to major deadlines, approvals, deliverables, or meetings
- Create dependencies between tasks that need to happen in a specific order
- Determine the critical path; the critical path is the sequence of events that will dictate how long it will take to complete the project
- Consider including contingency plans (Plan B)
- **PRO TIP!** Determine the priority of the project in relation to other projects and other work currently in progress
- **PRO TIP!** Add project buffer time



Did I mention communication?

- Project plans are useless unless they've been communicated effectively
- Every team member needs to know their role and responsibilities
- Communicate early and often
- **PRO TIP!** Be honest about communicating the project's progress, challenges (aka roadblocks), and remaining work
- Conversely, don't hesitate to celebrate and share victories, however small, and acknowledge progress

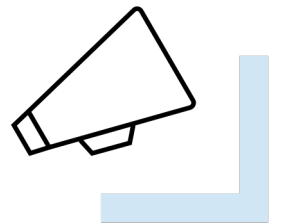


Communication Plan

How will your team communicate amongst yourselves and with other teams?

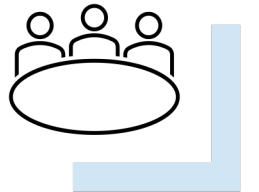
Things to consider:

- Regular meeting with fixed agendas
- Written notes
- Change log
- Project documentation (Project charter)
- Project status reporting



Project Rituals

- Conduct a **planning review meeting** to get consensus on final project plan
 - Ensure all project participants and key stakeholders understand the project plan and that all issues and risks have been identified and planned for as best as possible
- Hold periodic review meetings to assess planning progress
 - Informal review meetings with project team



Project Rituals cont.

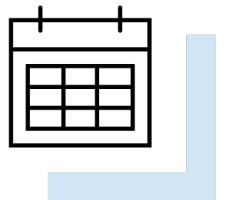
- **Kick-off Meeting**

- Establish project manager role and responsibilities
- Review team member roles, responsibilities and availability to project
- Ensure project participants and their supervisors have common expectation about time commitment to project and responsibility to project manager
- Review and reach consensus on project scope



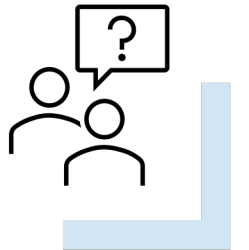
Project Rituals cont.

- **Daily/Weekly/Monthly Team Standup Meetings**
 - What did you accomplish since the last meeting?
 - What are you working on until the next meeting?
 - What is getting in your way or keeping you from doing your job?



Project Rituals cont.

- **Post-Mortem Meeting** – these are great to improve your processes and to let team members share how the project went from their perspective
- **Sample questions can be:**
 - What worked?
 - What didn't work?
 - What should we start, continue or stop doing?
 - What did we do well?
 - What could we have done better?



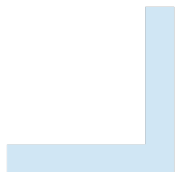
Tracking and Reporting Progress

A project needs monitoring – it is not a “set it and forget it” type of thing

- Perform regular, scheduled assessments with your team and stakeholders
- Use a way to track tasks and have an issue log to track open issues and assignment for resolution

Questions to ask along the way:

- Is the project still in scope? Is the scope creeping?
- Is the timeline still achievable? Why or why not?
- Where are the roadblocks? Who can address these issues?
- Have you learned anything that indicates a need for changes to your project?



Tracking and Reporting Progress cont.

Project Definitions

Project Status

- **Active:** The project is currently being worked on by the project team.
- **Completed:** Work on the project has finished, and all deliverables/tasks have been completed.
- **Cancelled:** The project has not finished, and work on the project will not continue.
- **On Hold:** The project has not finished, and work on the project has been temporarily suspended.

Project Phase

- **Plan:** The project workplan is being created.
- **Build and Implement:** The project solution is being created or launched.
- **Transition & Close:** Project deliverables are being finalized and handed off to the operational team.
- **Completed:** The project is completed. Ongoing operations and maintenance have been transitioned to the operational team.

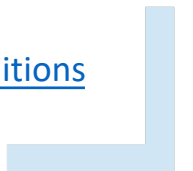
Project Health

- **On Track:** The project is on schedule, within scope, and within budget. Project resources are available for project activities when needed.
- **At Risk:** There are risks and/or issues that might impact achievement of the project's objectives.
- **Off Track:** There are significant issues that have impacted achievement of the project's objectives.

Risk/Issue Details

- **Issue:** An event that has happened and may impact achievement of the project's objectives if not resolved.
- **Risk:** A potential event that may impact achievement of the project's objectives if it does happen.

Source: bpm.berkeley.edu/projects/project-definitions



Change Management/Scope Creep

If there is not a change control mechanism in place, projects can easily slip out of control.

- Changes to the scope of a project are inevitable
- Capture every change and determine whether it should be done
- Determine the impact on the project timeline
- **PRO TIP! Negotiate.** When something is added, there is an opportunity to drop or lower the priority of another item.
- **PRO TIP!** Consider a formal process such as a change request or requiring an approval prior to adding a new item. This can help with determining if what is being asked is really needed for the project.



Project Closeout

Ensure all deliverables have been received and conform to project plan (obtain formal sign-off from stakeholders if possible)

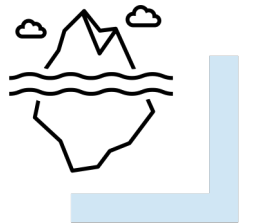
Questions to ask:

- Did you meet the project's goals?
- Did you receive sign-off on the deliverables?
- Have you transitioned any service/support work to those responsible for it?
- What lessons did you learn? How can you use them and your project's information to improve a future project?
- Did you thank your team and your stakeholders? Is there an opportunity to thank your team publicly or announce your results widely?



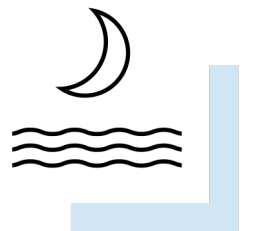
Project Gotchas

- Bad multi-tasking, especially in an environment with other projects or competing daily needs
- Pessimistic or optimistic estimating for all tasks of the project
- Student Syndrome – waiting until the last minute
- Parkinson's Law – "Work expands so as to fill the time available for its completion"
- Ineffective communication – miscommunications, delays, and conflicts
- Look for warning signs:
 - Everything is urgent
 - It's too quiet
 - Team member burnout



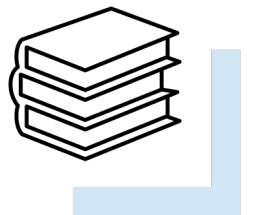
Conclusion

- Following these best practices does not guarantee you will have a successful project, but they will provide a better chance of success.
- **There is always more to learn!**



Resources

- LinkedIn Learning (provided by UVA) for Project Management Courses
- PMI (Project Management Institute) - www.pmi.org offers Project Management Professional (PMP)® certification
- ITS Software: https://virginia.servicenow.com/its?id=itsweb_services&category_id=1f0fc337db5fc7c0f032f1f51d9619b0



Project Management Tools

Communication Tools

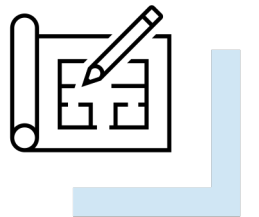
- Microsoft Teams (create a project channel)
- Zoom for meetings (record and save chats)
- Email
- Outlook (shared project calendar)

File Storage & Collaboration

- SharePoint Online
- OneDrive
- OneNote
- Microsoft Teams

Task Tracking Tools

- Excel
- Smartsheet
- Outlook (Tasks)
- Microsoft To Do
- Microsoft Planner



Microsoft To Do

- Free and included with the Microsoft 365 Suite
- Can have multiple to-do lists
- Similar to Outlook Tasks, but better
 - Flagged emails are automatically added to your To Do list
 - Able to create recurring tasks and subtasks
- Can connect your tasks from MS Planner – see your group and individual tasks together
- Makes it easy to plan your daily to-do list (paperless!)





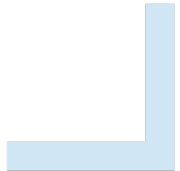
Within Outlook (desktop & online)

The screenshot displays the Microsoft Outlook desktop application interface. At the top, the 'UNIVERSITY of VIRGINIA Outlook' header is visible with a search bar. The main window is divided into three panes: a left-hand navigation pane, a central email view, and a right-hand task pane.

Left-hand navigation pane: Shows 'Favorites' including 'Inbox' (11842), 'Sent Items', and 'Deleted Items' (557). Below this, the account 'aee3m@virginia.edu' is listed with its own 'Inbox' (11842) containing a list of folders like '1 - REPLY', '2 - DO (5+)', '3 - MEET' (41), '4 - REMIND', '5 - FORWARD', '6 - REVIEW' (81), '7 - WHEN', '8 - Processed Em: 8', and 'CASE'.

Central email view: The 'Inbox' is selected, showing a list of emails. The selected email is from 'Cvent Notifications' with the subject 'Day of Learning 2023 is available...'. The email content is partially visible, showing a blocked image warning and the text: 'Day of Learning 2023, exported on 18-Jul-2023, is now available for download. Log in and download the file. This file will be available for download until 25-Jul-2023.' Below the email content are 'Reply' and 'Forward' buttons.

Right-hand task pane: The 'To Do' task pane is active, showing a list of 'Flagged Emails'. The 'To Do' tab is circled in red. The list includes tasks such as 'How to Make Employee Onboarding a Top Priority: Now available', 'Reminder: You have access to Pyn's Employee Journey Mapper', 'Session for New Hires: What is ACE?', 'Path to Success Tech Additions', and 'Boar's Head Reservation Confirmation'.





Within Teams

The screenshot displays the Microsoft Planner interface within a Teams environment. The left sidebar contains navigation options: Activity (3 notifications), Chat, Teams, Calendar, Calls, Files, Planner (selected), OneNote, Viva Insights, and Apps. The main area is titled 'Tasks by Planner and To Do' and shows a list of tasks under the 'Read/Watch This' view. The tasks are sorted by priority and due date.

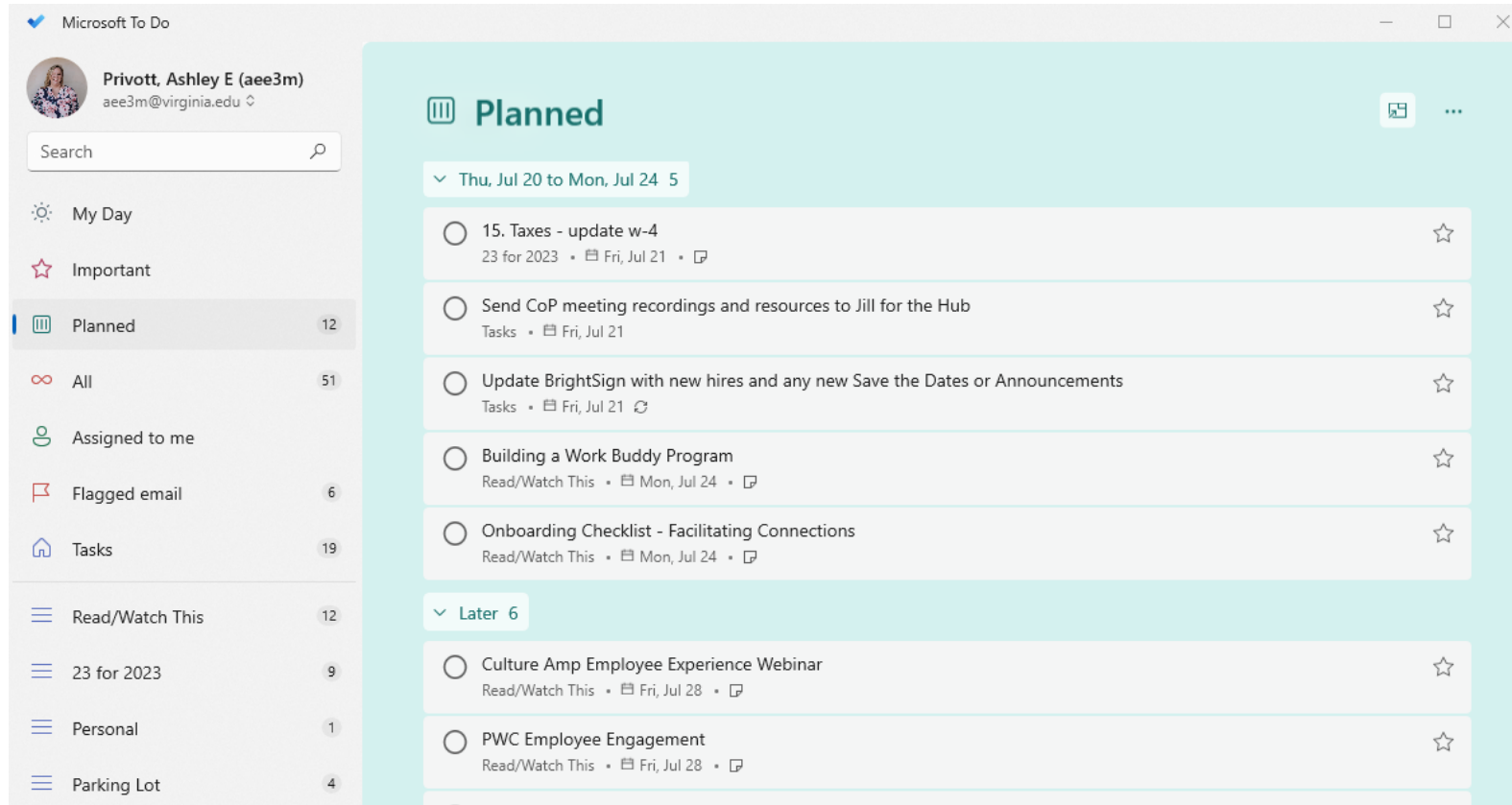
Task title	Pri...	↑	Due	
+ Add a task				
Building a Work Buddy Program			7/24	...
Onboarding Checklist - Facilitating Connections			7/24	...
Culture Amp Employee Experience Webinar			7/28	...
PWC Employee Engagement			7/28	...
Intranet Buyers Guide			9/1	...
Culture Report	1			...
Employee Connection Culture				...
Employee Journey Mapping	0/3			...
Hybrid Work Podcast				...
Leading a Hybrid Work Environment				...
The "Great Rethink"				...
Watch Priya Parker SXSW 2022				...

Project Management Best Practices and the Tools You Already Have





In a stand-alone app





From your phone

