

COMMON TOOLS UNCOMMON RESULTS



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Simple Concept

Recipe:

Principles of Project Management (PMBOK)

- + Ordinary tools found on Desktops
- + Discipline to use Principles routinely
- + A leavening of Good Judgement
- + A dash of Common Sense

**Enjoy Extraordinary Results
that contribute directly to the bottom line**



OBJECTIVE

- **“Space Pens” or Pencils?**
 - **Importance of Good Value**
 - **Finding value in the tools we have**
 - **Know-How, Samples, and Checklists**
-

COMMON TOOLS

- **E-mail**



- **Word Processing**



- **Spreadsheet**



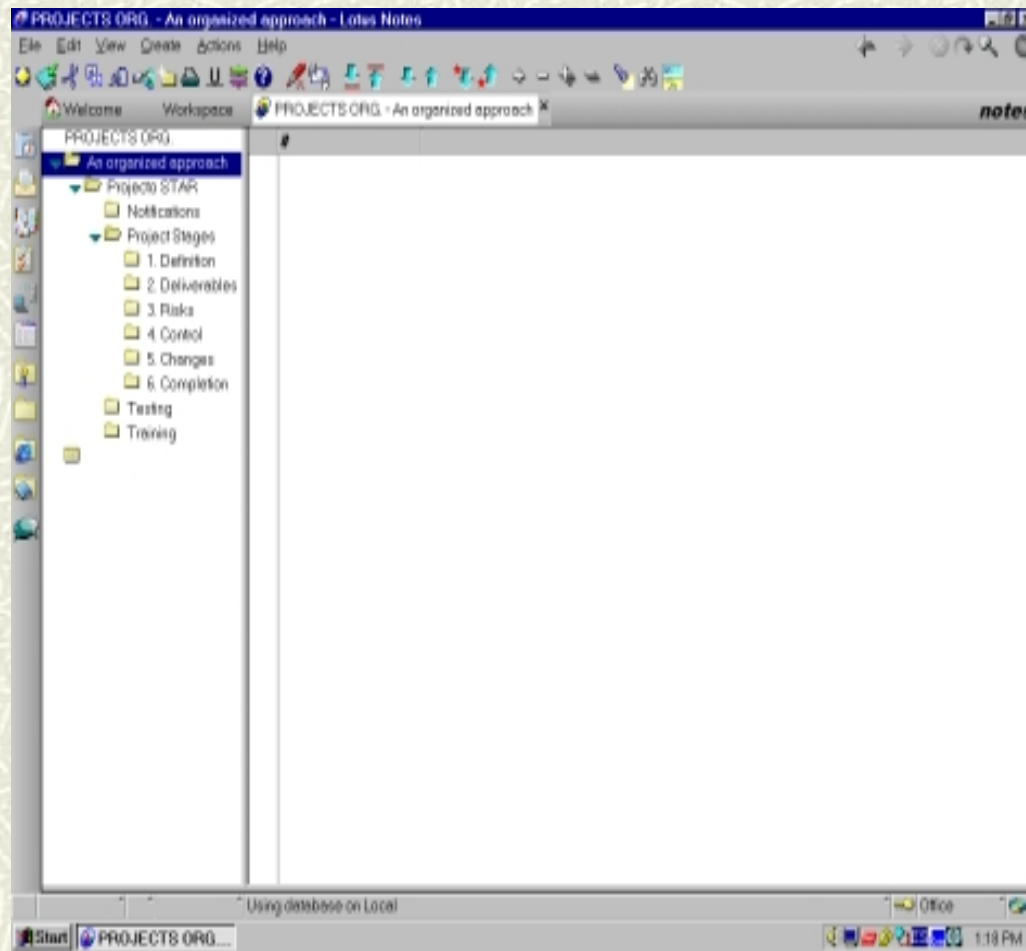
- **Presentations**



MAILBOX ORGANIZATION

Suggested Folders or Mailboxes:

- Project X
 - Notifications
 - Project Stages
 - Definition
 - Deliverables
 - Risks
 - Control
 - Changes
 - Completion
 - Training
 - Testing



NAMING CONVENTIONS

Search Rules:

To:, From:, Subject:

- a) What is in the Folder
- b) Where it should be placed
- c) Something about the Status

Ex; 'Message Name (Folder_Status)'

NAMING CONVENTIONS (cont'd)

Suggested status indicators:

Draft, Approved, Revised, Proposed, etc.

Managing Emails:

- **Keep It Simple**
 - **Addressing**
 - **To: -- only if action is required**
 - **CC: -- F.Y.I. Copies**
 - **BCC: -- to limit exposure to distribution list**
 - **Replies**
 - **Fewer the Better**
 - **Reply All – no good**
-

GOALS and ROLES

Core Concept - Delivery of Value Counts

**Team must know that project work adds value
by producing a useful product**

(Value is realized when product is accepted)

**P.M. is primarily concerned with assuring that
all project work add value**

(Team Roles assure effectiveness)

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GOALS and ROLES

ROLES

Project Manager - identifies, monitors, manages the value stream from beginning to closeout

Project Coordinator - administers information assuring timely and accurate knowledge of the Value status

Deliverable Owner - responsible for completion of deliverables. (2 roles: producer & consumer)

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GOALS and ROLES

ROLES (cont'd)

Producer - focus on output. Needs to completely understand what it means to be done & what is required to get the job done

Consumer - focus on input. Concerned with what will be received, when it will be available & if it will be suitable

DOCUMENTS BY PHASE

Initiation Phase

E-mails or Word Documents:

- **Project Statement**
- **Project Charter**
- **Statement of Work**

Spread Sheets:

- **Resources Data**
 - **Activities**
 - **Risks**
-

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DOCUMENTS BY PHASE

Planning Phase

Deliverables

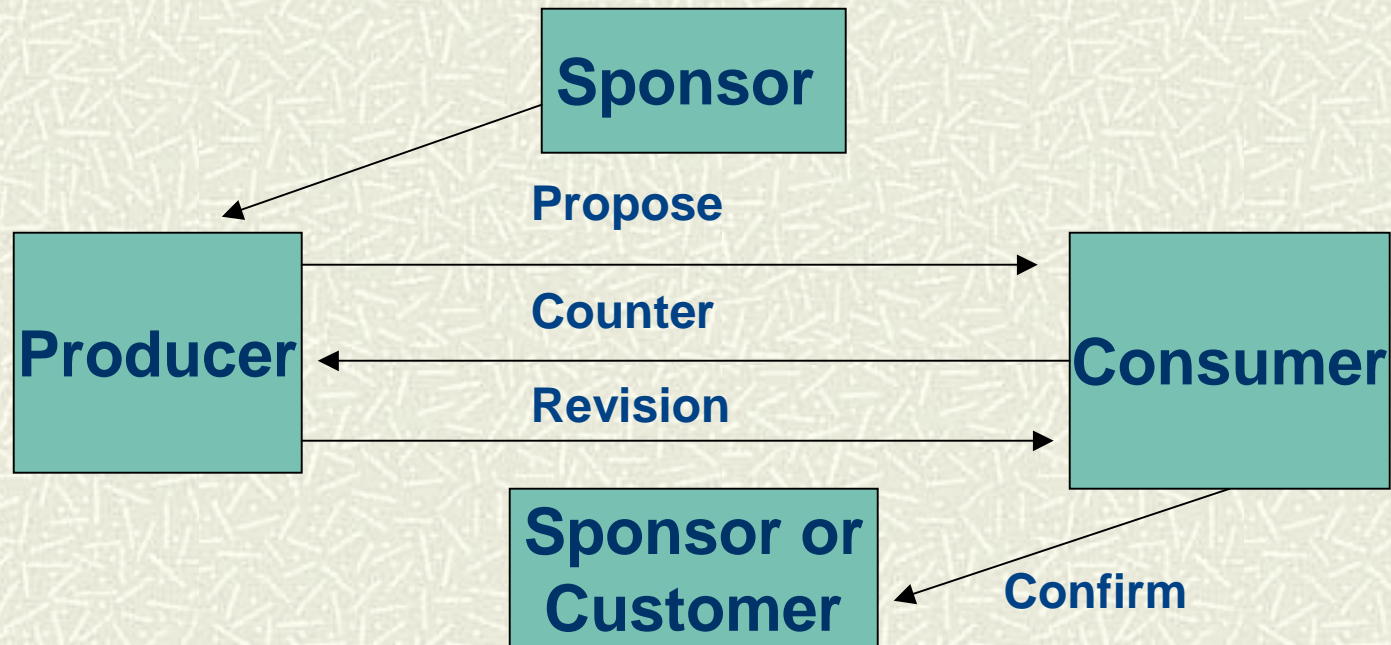
Most important to understand:

- **What, Whom, When, at What Cost**
 - **Negotiation, Agreement & Commitment on specific, measurable Deliverables = Basis of Success**
 - **When negotiations are not proceeding**
-

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DOCUMENTS BY PHASE

Gives and Takes in Arriving to an Agreement on Acceptable Completion Criteria



DOCUMENTS BY PHASE

Planning Phase (cont'd)

Deliverables Status Indicators

- Proposed
 - Counter Proposed
 - Revised
 - Confirmed (by customer)
 - Input Identified (by producer)
 - Estimated (time & cost)
 - Baselined (when approved)
-

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DOCUMENTS BY PHASE

Planning Phase (cont'd)

RISK - focus on possible future events

STATUS OUR COMMUNICATONS

- Risk Identified
 - Risk Quantified (Qualified)
 - Mitigation
 - Contingency (if risk becomes an actual problem)
-

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DOCUMENTS BY PHASE

Planning Phase (cont'd)

WORK BREAKDOWN STRUCTURE

Post-it Notes & Big Wall

SCHEDULE

Spread Sheets

**PM Software tool - only for large and
risky efforts**

DOCUMENTS BY PHASE

Execution Phase

Focus on:

- **What is done & what is not getting done**
 - **Open Issues that might limit our ability to complete the project**
 - **How to ask for help outside the Project Team**
 - **Track proposed and approved Changes**
-

DOCUMENTS BY PHASE

Execution Phase (Cont'd)

USAGE OF OUR COMMON TOOLS

- **Status Reports (weeklys)**
 - **Variance (10-15%)**
 - **Completion**
 - **Issues (severity, urgency)**
 - **Actions & Corrective Actions**
 - **Escalation (decision, sources, dates)**
 - **Change Control**
-

DOCUMENTS BY PHASE

Closeout Phase

“It’s not over ‘til it’s Over” – Yogi Berra

Hands-off Checklist Document:

- 1. What needs to be done**
 - 2. How it will be tested and measured**
 - 3. Who has the authority to accept**
 - 4. Place for initials – formal acceptance**
-

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DOCUMENTS BY PHASE

Closeout Phase (cont'd.)

**“ACCEPTANCE OCCURS WHEN
CUSTOMER IS SATISFIED.....
NOT WHEN WE SUBMIT THE
DELIVERABLE”**



SUMMARY

IMPLEMENTATION CHECKLIST

STANDARDS:

- **Folders or Mailbox Structure**
 - **Naming Conventions**
 - **Status Indications**
 - **Sorting and Selecting Rules**
 - **Medium (E-mails, Word, Excel, etc.)**
 - **P.M. Components (SOW, Deliverables, Logs, etc.)**
 - **Reporting Frequencies (Status, Issues, Corrective Actions, Escalations, Monitoring, etc.)**
 - **Roles & Responsibilities**
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SUMMARY

IMPLEMENTATION CHECKLIST (cont'd.)

TRAINING

“In a Crisis, you don’t rise to the occasion. You sink to the level of your training”

– John Rennie, Senior Editor, Scientific American

“Tell me and I forget, Show me and I will remember, Involve me and I will understand”

- Confucius

COMMON TOOLS UNCOMMON RESULTS

REFERENCE

Common Tools, Uncommon Results

-- Penrose Vass Stout, MA, PMP

Stout Consulting / Project Four, LLC

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QUESTIONS

