Project Management Essentials

Our Approach to the Workshop

Discussion

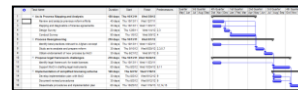We will introduce the module topic with an initial discussion on the topic's relevance

Leading Practices

We will discuss leading practices in Project Management and identify elements that will help us succeed in the field

Tools & Usage

A deep dive into tools show you the relevance and application method for each tool

Case Activity

You will team up and apply leading practices and tools to a case study example

Objectives

Each module begins with objectives to ensure you understand what we will learn

Knowledge Check

Knowledge checks after each leading practice section help you retain foundational information

Summary & Reflection

A concise summary helps you solidify key takeaways from the module and reflection provides an opportunity to discuss how you will apply PM skills

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Course Agenda – Day 1

Topic	Description
Module 1: Project Design	• Project Design Overview • Project Planning Matrix • Logic Structure • Work Breakdown Structure (WBS)
Module 2: Project Planning	• Project Planning Overview • Activity Planning • Network Analysis
Module 3: Resource Planning & Budgeting	• Resource Planning & Budgeting Overview • Cost Management • Budgeting

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Course Agenda – Day 2

Topic	Description
Module 4: Risk Management	• Risk Management Overview • Risk Management Lifecycle
Module 5: Stakeholder Management	• Stakeholder Management Overview • Stakeholder Analysis
Module 6: Implementation Management	• Implementation Management Overview • Implementation Tracking • Monitoring Implementation Activities • Closing-Out Implementation Activities
Wrap-up & Evaluation	• Training Recap • Final Remarks

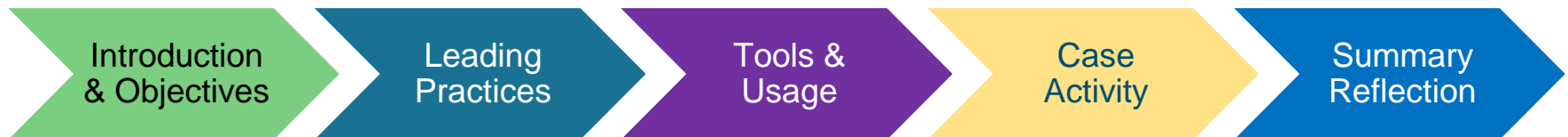**WORLD BANK GROUP**

Module 1: Project Design

Project Design

The Project Design Module includes both the Logic Model and Work Breakdown Structure

| Logic Model | Work Breakdown Structure |

Each unit incorporates a holistic learning approach with the following key components:

Introduction & Objectives → Leading Practices → Tools & Usage → Case Activity → Summary Reflection

Project Design Learning Objectives

After This Unit, You Can:

- Understand the key steps in Project Design

- Identify the components of a Logic Model and their relationship

- Put the Logic Model in the context of Project Management

- Define a Work Breakdown Structure (WBS) and list the steps to create one

- Explain why the WBS is the foundation of a project

- Use the Logic Model and WBS Templates in a real-life situation

The Project Planning Matrix

The PPM is the Overview of the Project

	Hierarchy of Objectives	Indicators	Means of Verification	External Factors (Assumptions, Risk)
Effects	Development Objective	Impact Indicators	Source of Information	
Results	Project Development Objective	Outcome Indicators	Source of Information	Assumptions, Risks
Service / Product Delivery	Outputs	Output Indicators	Source of Information	Assumptions, Risks
	Activities	Resources Inputs		Assumptions, Risks

The Logic Model – The Intervention Logic

The five core components of the Logic Model include Inputs, Activities, Output, Outcome, and Impact

Opportunity to Increase Efficiency   **Opportunity to Increase Effectiveness**

5. Inputs	4. Activities	3. Output	2. Outcome	1. Impact
Resources associated with the project (i.e. what will it cost to deliver the project?)	Actions taken to produce results	The delivered services that result from a series of activities	The objective the project is designed to contribute to	The effect of the project on the broader environment

Performance Indicators

WBS Template

The WBS template should be used to capture 100% of the work defined by the project scope, and to capture all deliverables
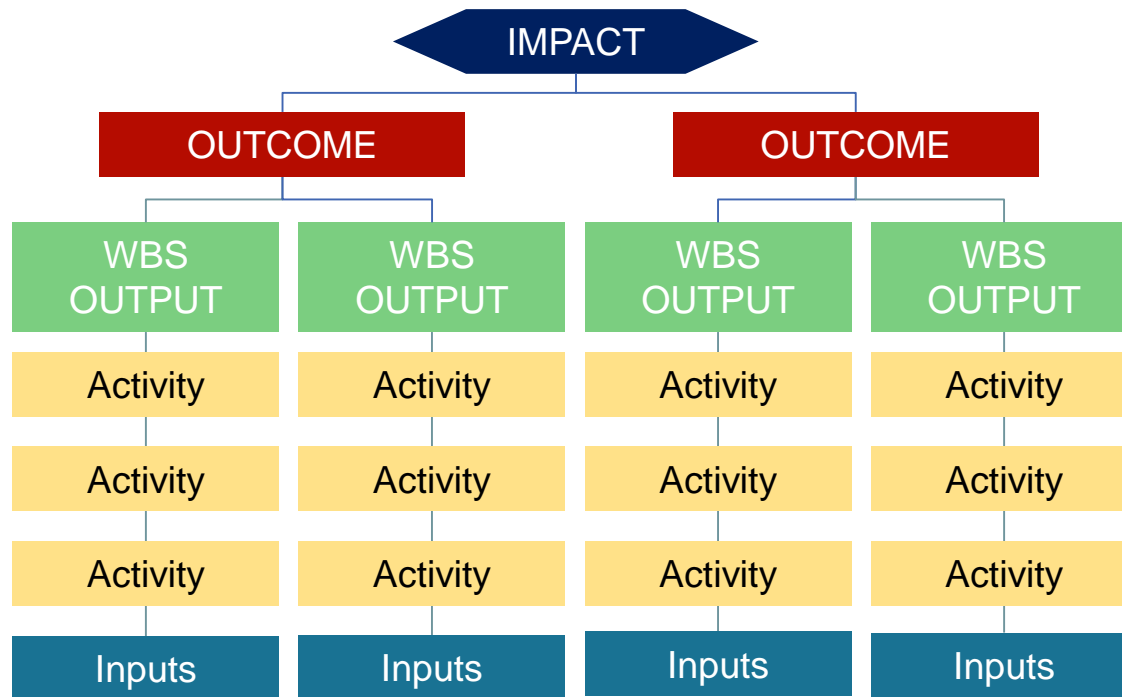
5. Inputs	4. Activities	3. Output	2. Outcome	1. Impact

IMPACT

| OUTCOME		OUTCOME	
WBS OUTPUT	WBS OUTPUT	WBS OUTPUT	WBS OUTPUT
Activity	Activity	Activity	Activity
Activity	Activity	Activity	Activity
Activity	Activity	Activity	Activity
Inputs	Inputs	Inputs	Inputs

WBS Alignment with Logic Model

The Work Breakdown Structure (WBS)

Work Breakdown Structure (WBS) is a hierarchical breakdown of elements of the logic model. The WBS serves to organize and define the total scope of the project
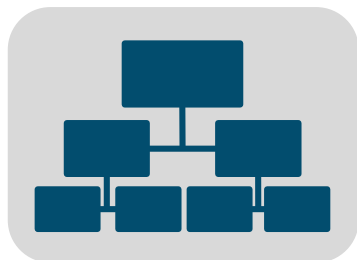
Decomposition: The subdivision of project deliverables into smaller, more manageable components until the work and deliverables are defined to the Activity, Sub-Activity or Task Level
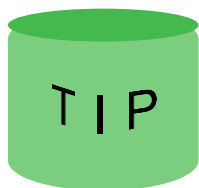
Tip: Create a WBS for the project before completing a Concept Note. The WBS will assist with determining the content for the Concept Note

The WBS is the Foundation of the Project
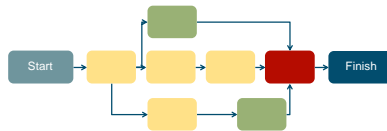
1. What do I need to do?
WBS

Refine Scope

Define Activities

2. What do I do first? How long will it take?

Start → Finish

Scheduling

Network Diagram

3. What resources will be needed?

Budgeting

Resources

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Activity Planning Template

The Activity Planning Template helps align the logic model elements with the WBS

IMPACT	Link to OCs	Outcome #	OUTCOME (OC)	Link to OPs	Output #	OUTPUT (OP)	ACTY #	ACTIVITY
20% private sector savings	OC1; OC2	OC1	Reduction of time to obtain new license	OP1; OP2	OP1	Licensing Reform	1	As-is process mapping and analysis
							2	Process re-engineering

SUB-ACTY #	SUB-ACTIVITY	PREDECE-SSORS	Resource Responsible	Start	End
1.1	Review and analyze previous reform efforts, past efforts	None	Name	4/21/11	4/26/11
1.2	Mapping and diagnostics of the 6 trade and 4 non-trade	None	Name	4/22/11	4/27/11
1.3	Design survey re: experiences with licensing	1.2	Name	4/23/11	4/28/11
1.4	Conduct survey	1.3	Name	4/24/11	4/29/11
1.5	As-is process mapping analysis completed	1.4	Name	4/25/11	4/30/11
2.1	Identify best practices relevant to Afghan context	1.2	Name	4/26/11	5/1/11
2.2	Study as-is analysis, suggest reform proposals, set	1.2	Name	4/27/11	5/2/11
2.3	Obtain endorsement of new process by Minister of	2.2	Name	4/28/11	5/3/11
2.4	Process re-engineering complete	2.3	Name	4/29/11	5/4/11

Module 2: Project Planning

Project Planning Learning Objectives

After This Unit, You Can:

- Systematically identify relevant activities to achieve required outputs

- Define network analysis and its uses in project planning

- Perform a forward pass, a backward pass, and calculate a float

- Identify the critical path in your project plan

Activity Scheduling

Defining what goes first and how long activities take is the second step
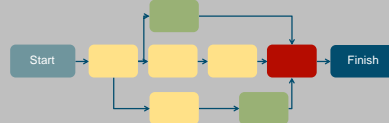
1. What do I need to do?
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Refine Scope

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2. What do I do first? How long will it take?

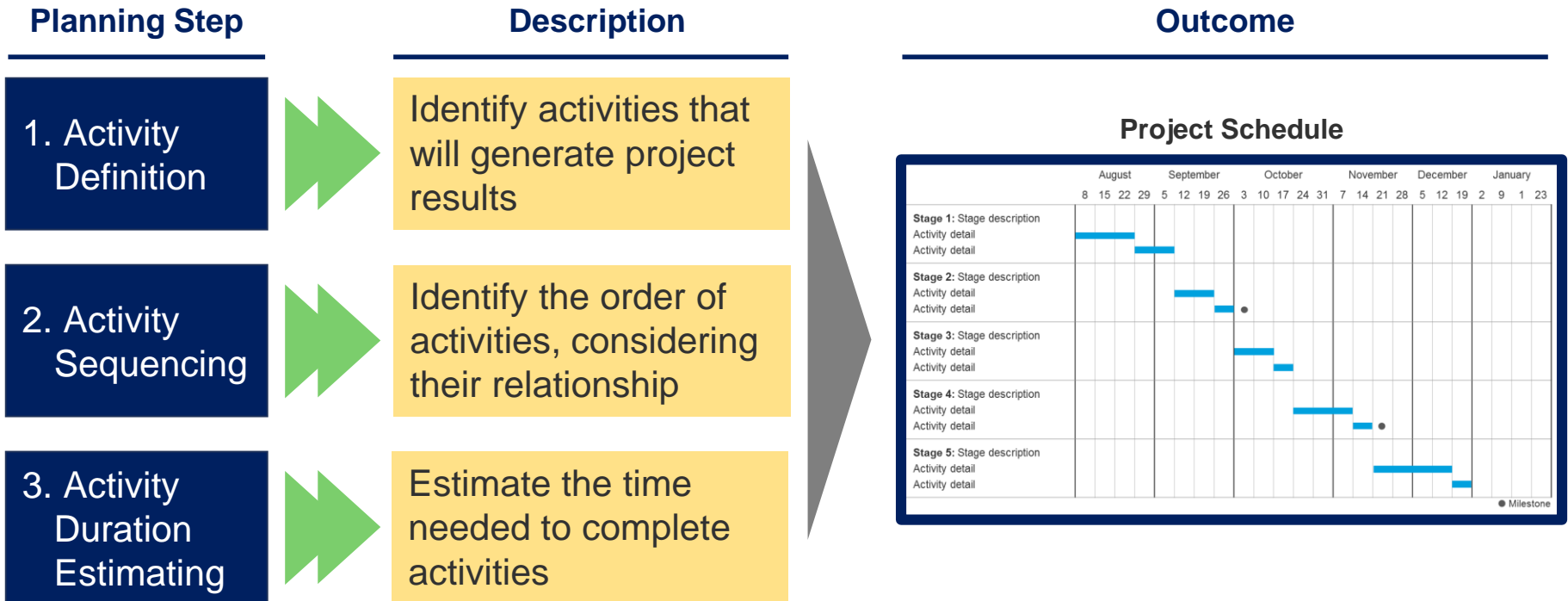Scheduling

Network Diagram

3. What resources will be needed?

Budgeting

Resources

Activity Planning Steps

Activity Planning typically includes three steps that allow the project schedule to be created

Planning Step	Description	Outcome
1. Activity Definition	Identify activities that will generate project results	
2. Activity Sequencing	Identify the order of activities, considering their relationship	
3. Activity Duration Estimating	Estimate the time needed to complete activities	

Project Schedule

	August	September	October	November	December	January
	8 15 22 29	5 12 19 26	3 10 17 24 31	7 14 21 28	5 12 19	2 9 1 23
Stage 1: Stage description Activity detail Activity detail						
Stage 2: Stage description Activity detail Activity detail						
Stage 3: Stage description Activity detail Activity detail						
Stage 4: Stage description Activity detail Activity detail						
Stage 5: Stage description Activity detail Activity detail						

● Milestone

Proper activity planning provides the framework for developing an integrated project approach and implementation plan, ultimately allowing for the creation of the project's Design Document

Defining Activities

Outputs should be decomposed into activities that allow the project to achieve the desired impact. These activities are typically:

| Estimated | Managed | Measured |

Each activity outlined within the WBS must be complete and accurate, as it will be leveraged to develop the project schedule.

WBS OUTPUT	WBS OUTPUT	WBS OUTPUT	WBS OUTPUT
Activity	Activity	Activity	Activity
Activity	Activity	Activity	Activity
Activity	Activity	Activity	Activity

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Network Diagram Template

The Network Diagram Template may be created to schematically show the sequencing of projects
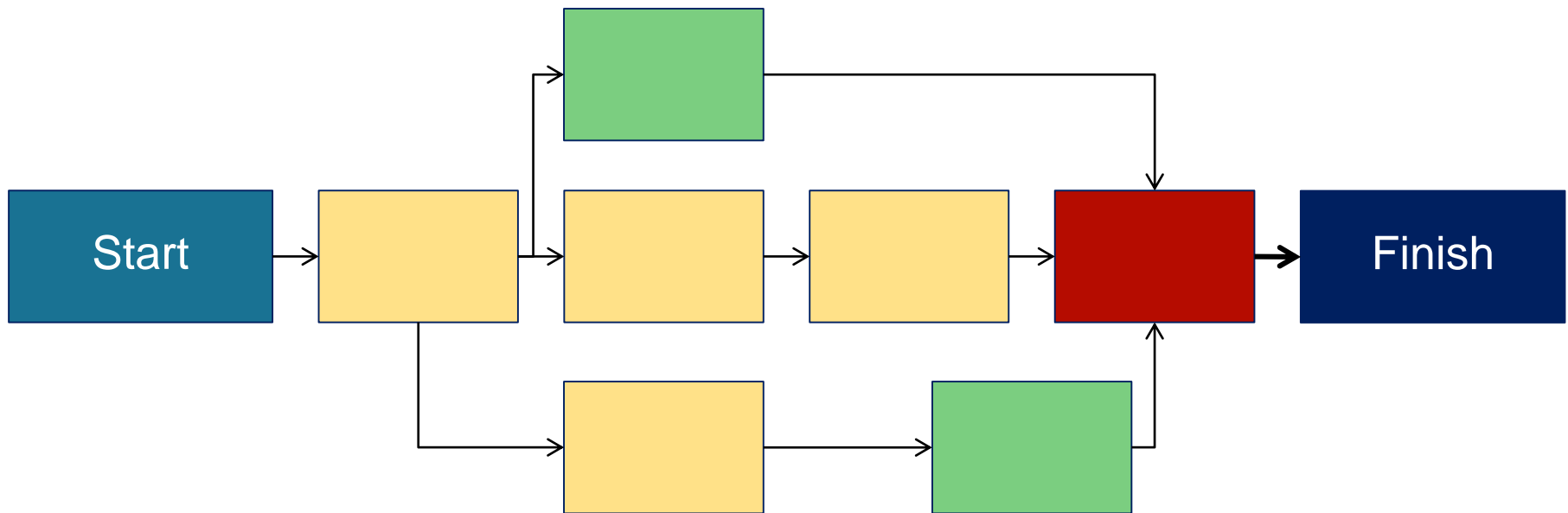
A completed network diagram can be used to identify the critical path of a project, which is the series of dependent activities that determines the shortest possible duration of a project

Activity Duration Estimating

Consider these elements in estimating the number of work periods that will be needed for each activity

- ✓ Potential and available resources and capabilities
- ✓ Constraints
- ✓ Delays and lag-times
- ✓ Risks and build-in reserve/contingency time
- ✓ Input from subject matter experts and historical information
- ✓ Assumptions
- ✓ Start and end dates for project activities

Tools for Activity Planning and Network Analysis

Microsoft Project is available for you to use as a Project Management tool

Microsoft Project

- Requires buying a license

- Industry standard; widely accepted and used in the corporate environment

- Extensive help resources online and offline

- Does not require Java

- Excellent scheduling, resource planning, and cost tracking tool

Module 3: Resource Planning & Budgeting

Resource Planning & Budgeting Learning Objectives

After This Unit, You Can:

- Understand key restrictions to project management

- List steps involved in estimating resource requirements

- Understand elements that drive costs on a project

- Complete a resource estimation worksheet

Estimating Resources

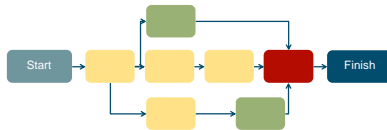The third step, estimating resources, is critical for project success

1. What do I need to do?
WBS

Refine Scope

Define Activities

2. What do I do first? How long will it take?

Start → Finish

Scheduling
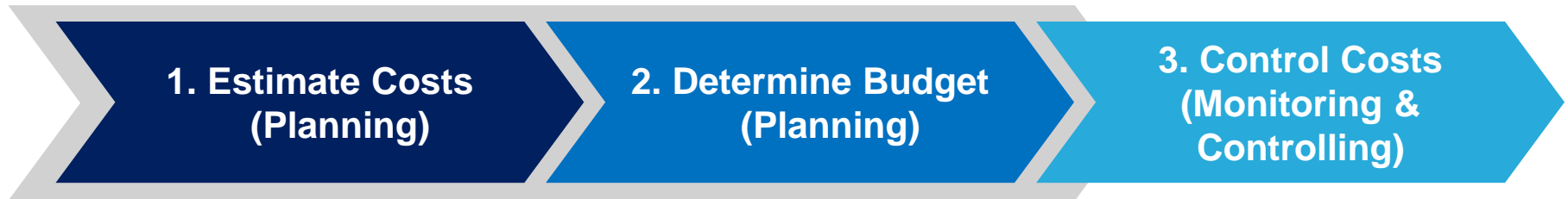
Network Diagram

3. What resources will be needed?

Budgeting

Resources

Cost Management Processes

In a competitive budgetary environment, formal cost management is a crucial project management skill

Three interactive processes are required to manage costs effectively:

1. Estimate Costs (Planning)	2. Determine Budget (Planning)	3. Control Costs (Monitoring & Controlling)

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Costs, Budgets, and Monitoring

By spending the appropriate time estimating costs, determining the budget, and controlling costs, the project can achieve its objectives

Estimate Costs (Planning)	Determine Budget (Planning)	Control Costs (Monitoring & Controlling)
Inputs:	**Inputs:**	**Inputs:**
• Scope	• Activity Cost Estimates	• Project Management Plan
• Project Schedule	• Basis of Estimates	• Project Funding Requirements
• Risk Analysis	• Resource Calendars	• Staff and Consultant Updates
• Assumptions	• Contracts	
• Type/Availability of Resources	• Consulting Resources	**Tools & Techniques:**
		• Forecasting
Tools & Technique:	**Tools & Techniques:**	• Performance Reviews
• Design to Budget	• Cost Aggregation	• Project Management Software
• Top-down Estimating	• Expert Judgment	
• Bottom-up Estimating	• Budget Revision	**Outputs:**
		• Budget Forecasts
Output:	**Outputs:**	• Change Requests
• Activity Cost Estimates	• Cost Performance Baseline	• Project Management Plan Updates
• Basis of Estimates	• Project Funding Requirements	
• Project Document Updates	• Project Document Updates	

Estimating by Type of Resource

People and travel drive the majority of the project expenses

Estimate Activity Resources:

Estimate the type and quantities of people, travel and other project costs required for each activity

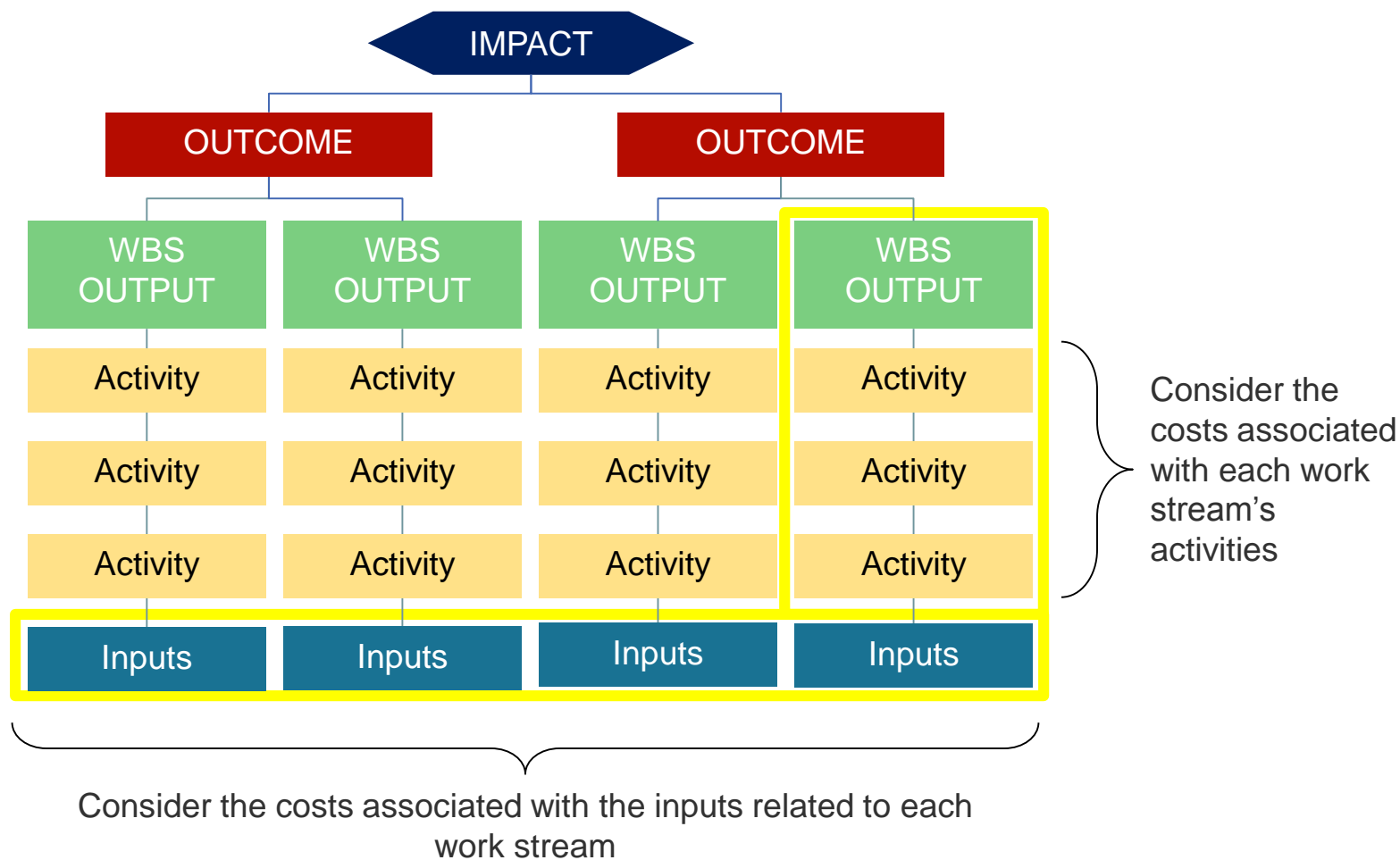| **People**	**Travel**	**Other Costs**
Both staff and consultants need to be reflected	Transportation and all other travel-related expenses	Materials, leases, and all other services or overhead

Types of Costs

Consider the impact of various types of costs on expense over time

Direct Costs	Versus	Indirect Costs
• Costs directly attributable to project work • Examples: team travel; salaries; cost of materials		• Overhead items or costs that benefit more than one project • Examples: office support staff; use of office space
Fixed Costs	Versus	Variable Costs
• Costs that do not change as production changes • Examples: leases; other pre-arranged contracts		• Costs that change with the scope and time spent • Examples: staff salary; consultant fees

Incorporating Costs within WBS

When planning your activities, consider how the various activities and WBS outputs will effect costs and overall budget

Consider the costs associated with each work stream's activities

Consider the costs associated with the inputs related to each work stream

Budgeting Techniques

Various budgeting techniques can be used depending on the project

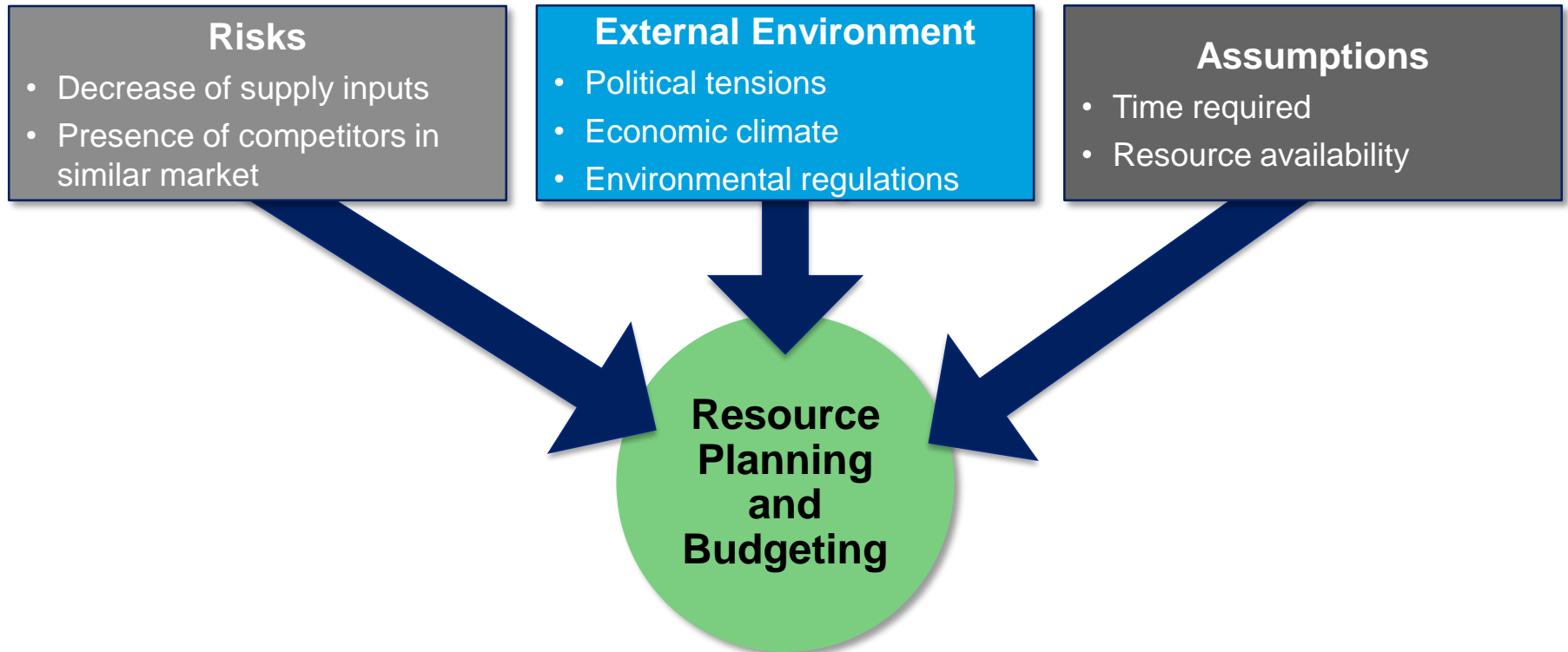| **Design-to-Budget**:	**Top-down Estimating**:	**Bottom-up estimating:**
Used when the project budget is fixed. Costs are estimated by working backwards from the total budget through prioritizing and assessing requirements until the project can be completed within available budget.	This approach typically relies on cost histories from past projects, and knowledge of the specific parameters of those projects.	Requires a cost estimate to be developed for each of the work packages in the WBS. Then, once the cost of each work package is estimated, the estimates can be added together to compile the total project cost estimate.

While top-down estimation is a quick way to establish a baseline for the project, it is rarely sufficient for estimating project costs and should always be accompanied with a bottom-up estimation technique

Considerations for Resource Planning & Budgeting

Assumptions, risks, and external environment play a role in resource planning and budgeting, potentially impacting total costs

Risks
- Decrease of supply inputs
- Presence of competitors in similar market

External Environment
- Political tensions
- Economic climate
- Environmental regulations

Assumptions
- Time required
- Resource availability

Resource Planning and Budgeting

Project Management Essentials
Day 2

Course Agenda – Day 2

Topic	Description
Module 4: Risk Management	• Risk Management Overview • Risk Management Lifecycle
Module 5: Stakeholder Management	• Stakeholder Management Overview • Stakeholder Analysis
Module 6: Implementation Management	• Implementation Management Overview • Implementation Tracking • Monitoring Implementation Activities • Closing-Out Implementation Activities
Wrap-up & Evaluation	• Training Recap • Final Remarks

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Module 4: Risk Management

Risk Management Learning Objectives

After This Unit, You Can:

- Define risk, opportunity, and risk management

- Understand the importance of risk management

- List and define 5 general kinds of risk

- Explain the 4 steps in the risk management process

- Develop a plan to mitigate risks using a risk log

- Continually monitor and update risks over a project life cycle

Introduction to Risk Management

Risk is the probability of a condition or event with a negative impact on achieving a business objectives

Risk Management is the process of identifying, assessing and managing risks so as to avoid, mitigate, or control them

Identifying Potential Risks

Strategic: The potential risk of a failure to achieve WB's strategic mission

Operational

The financial and reputational impact resulting from inadequate or failed internal processes, people, and systems, or from external events

Financial

The risk that financial contributions from donors and clients are inadequate to fund the work in line with the Board approved strategy

Stakeholder

Negative perception on the part of stakeholders including clients, donors, affected communities, civil society organizations, or other relevant parties

Social and Environmental

S&E environmental assessment and management systems; labor &working conditions; pollution prevention & abatement; community health & safety; indigenous people

The Risk Management Lifecycle

Risk Management is a dynamic process, beginning at the planning phase of a project, and continuing throughout the project life cycle

Risk Management is divided in four phases:

| 1. Risk Identification	2. Risk Assessment	3. Risk Mitigation	4. Risk Monitoring and Control
Identifying, logging and classifying risks.	Assessing probabilities and impact to prioritize risks.	Determining response to risks.	Continuous monitoring and updating.

Phase 1: Risk Identification

The first step consists in identifying, logging, and classifying the risks

Identification Guidelines	Documentation Guidelines
1. Brainstorm a comprehensive list – do not try to analyze or solve at this point	1. State the risk and the area of impact and be as specific as possible
2. Use PM documents for identification (WBS, work plan, stakeholder analysis)	2. Use complete sentences and do not include questions or action items
3. Work with your team (they will be doing the work; with project and regional leadership, they have the experience) to identify risks	3. Document risks based on categories consistent with your work

Common Risks to Achieve Program Objectives
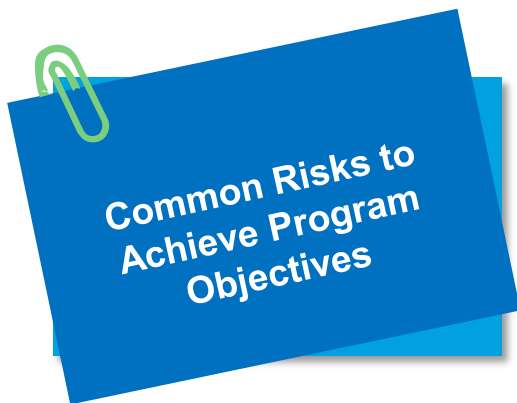
- Low Capacity of Client Implementation Teams
- Low Commitment of Key Client Groups
- Competition for Qualified Individuals
- Inability to Maintain Momentum
- Failure to Scale Pilot Projects

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Phase 2: Risk Assessment

The second step consists of assessing risk probability and impact in order to prioritize risks

Assessment Guidelines
1. Assess probability of risk occurring
2. Assess impact of risk occurring
3. Determine appropriate risk quadrant
4. Assess stakeholders involved (bubble size)
5. Determine risk priority

Mapping

Probability of Risk

Impact of Risk Occurring
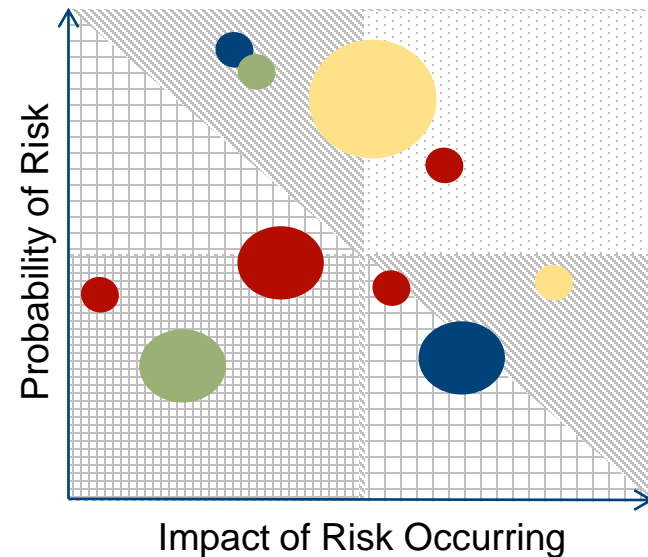
- The size of the bubble indicates the level of influence of resources involved
- The location indicates the level of influence and impact
- The color indicates group category

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Phase 3: Risk Mitigation

The third step is determining a response to risks

Avoid	Eliminate the threat by eliminating the cause
Mitigate	Reduce the probability or impact of the risk
Accept & Budget	Accept the risk and budget for contingencies
Transfer	Seek outside responsibility for risk management (outsource)

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Phase 4: Risk Monitoring & Control

The final step, monitoring and controlling risk, requires ongoing discipline of execution

Risk Monitoring & Control
1. Execute
2. Evaluate
3. Document

Risk Management Log

A Risk Management Log encapsulates the risk management process throughout the project lifecycle and should be constantly updated

Identification					Assessment				
Risk #	Description	Created By	Created On	Type	Probability (Likelihood)	Impact	Severity	Score	Priority
SAMPLE			10/30/09	Financial	5	4	High	20	High
SAMPLE	Finding resources of the right skill set might be difficult	Project Team Lead	8/11/09	Operational	4	3	Medium	12	High
SAMPLE			11/7/09		2	2	Low	4	Low

Mitigation		Control				Risk Severity Scoring:	
Risk Response	Action to be Taken	Assigned To	Date Due	Status		Low = 0-5	
Mitigate				Cancelled		Medium = 6-12	
Avoid	Establish relationship with professional Associations and universities to access pool of potential candidates.	John Smith	4/2/10	In Progress		High = 13-25	

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Module 5: Stakeholder Management

Stakeholder Management Learning Objectives

After This Unit, You Can:

- Define stakeholder and stakeholder engagement/management

- List and explain the steps for conducting a stakeholder analysis

- Define the strategies to manage stakeholders in your project

- List and explain the steps involved in creating a communication plan

Overview of Key Terms

Stakeholders are individuals, groups, and organizations that will impact or be impacted by the implementation of the project

Stakeholder Management is a structured approach to identifying and handling all aspects of stakeholder involvement and participation in the project.

Stakeholder Engagement is a continuous process of actively developing and building relationships with stakeholders throughout the life of the project.

Common Stakeholders:

- Project sponsor(s) or donor(s)
- Local consultants / academic institutions
- Clients, beneficiaries, and NGOs
- CMU, GP, and CCSA
- WBG colleagues
- Other (e.g. media outlets)

Stakeholder Analysis

Stakeholder analysis is the process of identifying and assessing the potential impact of stakeholders on the project
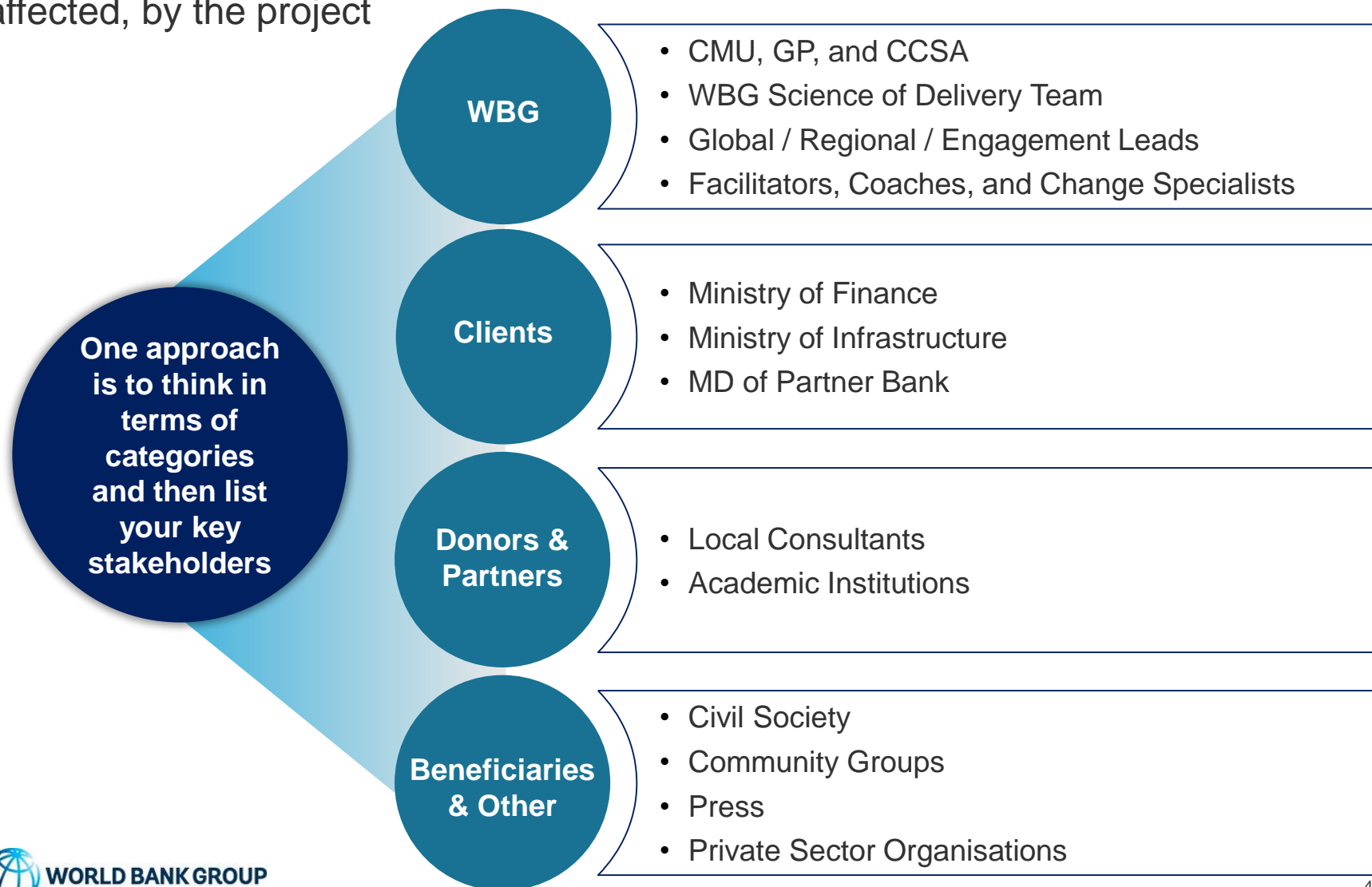
Key Activities

- Determine who is important to the project's success
- Identify the stakeholder's potential effect on the project
- Identify potential risks or project roadblocks
- Determine how to best involve stakeholders

Key Outcomes

- Develop enhanced relationships
- Define clear assumptions & potential risks
- Manage expectations of engagement

Step 1: Identify Potential Stakeholders

The first step is to determine all people, groups, and institutions that will affect, or be affected, by the project

One approach is to think in terms of categories and then list your key stakeholders

WBG
- CMU, GP, and CCSA
- WBG Science of Delivery Team
- Global / Regional / Engagement Leads
- Facilitators, Coaches, and Change Specialists

Clients
- Ministry of Finance
- Ministry of Infrastructure
- MD of Partner Bank

Donors & Partners
- Local Consultants
- Academic Institutions

Beneficiaries & Other
- Civil Society
- Community Groups
- Press
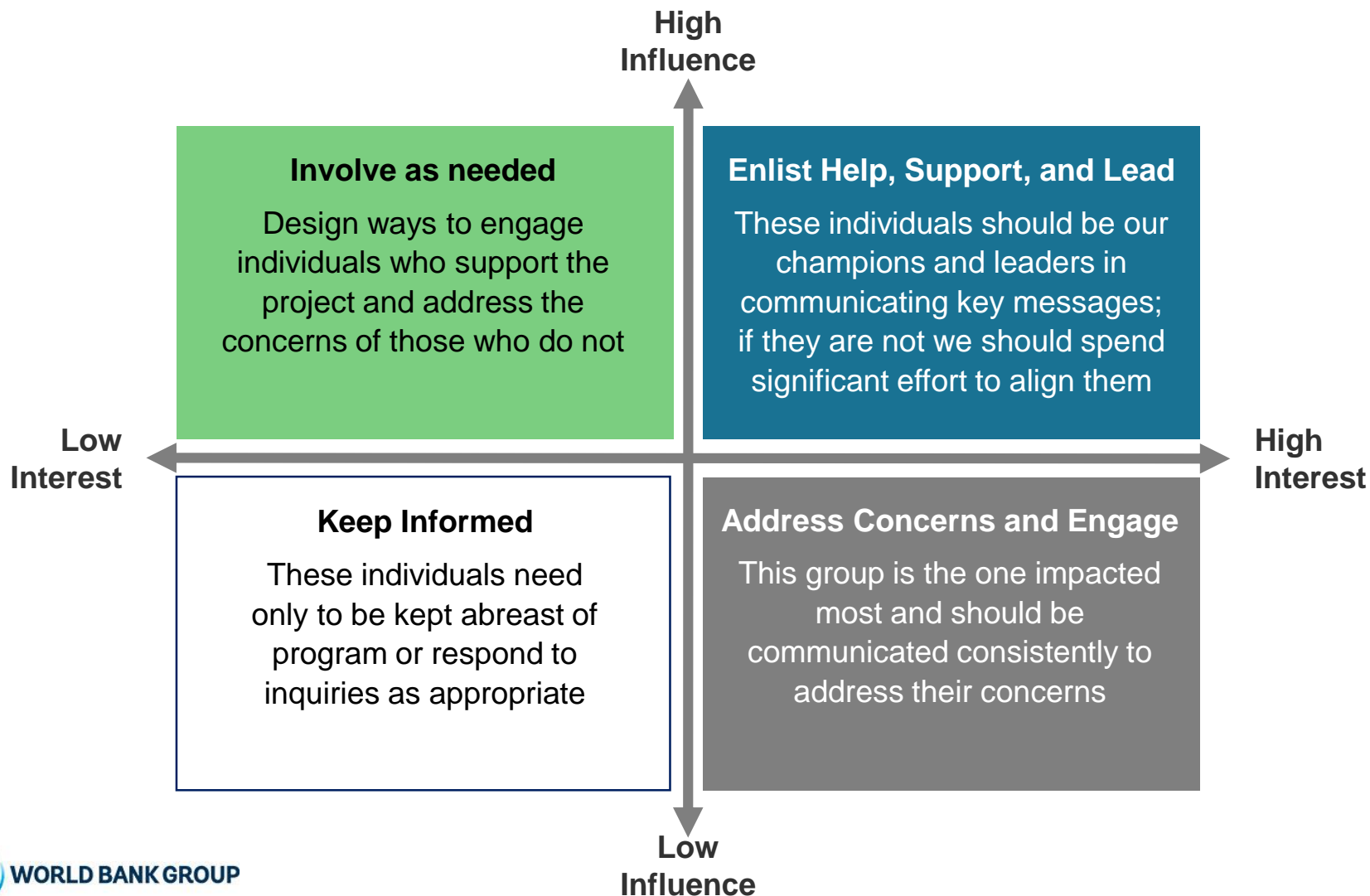- Private Sector Organisations

Step 2: Assess Stakeholder Connection to a Project

Each stakeholder will be able to impact a project and, therefore, it is important to identify and manage their level of influence

Relationship	Description
Interest	Stakeholder has a stake in the project and the degree to which the project impacts the particular stakeholder
Influence	Extent of involvement in the project and ability to make decisions that will impact the project
Support	Stakeholder's attitude towards the project, whether they are likely to view the project positively or negatively

Step 3: Determine Stakeholder Engagement Strategy

The strategy for stakeholder management is defined based on influence and interest

High Influence

Involve as needed

Design ways to engage individuals who support the project and address the concerns of those who do not

Enlist Help, Support, and Lead

These individuals should be our champions and leaders in communicating key messages; if they are not we should spend significant effort to align them

Low Interest

High Interest

Keep Informed

These individuals need only to be kept abreast of program or respond to inquiries as appropriate

Address Concerns and Engage

This group is the one impacted most and should be communicated consistently to address their concerns

Low Influence

Step 4: Document Relationship with Stakeholders

Ensure the stakeholder analysis worksheet is documented and updated

Sample Stakeholder Analysis Worksheet

External Stakeholder Analysis

Assessed through interview: level of influence, projected impact on role, degree of program involvement, current engagement stage
Assessed through Target Engagement Framework: target engagement stage

Client	Name	Meeting Date	Position	Level of Influence	Projected Impact on Role	Degree of Program Involvement	Engagement Stage *(as of April 2015)*	Current Engagement Stage *(as of...)*	Target Engagement Stage
Example Client	Doe, Jane	4/2/2015	Executive Director	3-Medium	2-Moderate	2-Moderate	Unaware		Partnership
Example Client	Doe, John	4/3/2015	Chief Management Officer	3-Medium	2-Moderate	2-Moderate	Unaware		Partnership
Example Client	Doe, Jane	4/4/2015	HR Director	3-Medium	2-Moderate	2-Moderate	Unaware		Partnership
Example Client	Doe, John	4/5/2015	Program Analyst	3-Medium	2-Moderate	2-Moderate	Unaware	This column will be used to track engagement progress and will be updated after future meetings are conducted.	Partnership
Example Client	Doe, Jane	4/6/2015	Administrative Assistant	3-Medium	2-Moderate	2-Moderate	Unaware		Partnership
Example Client	Doe, John	4/7/2015	Executive Director	3-Medium	2-Moderate	2-Moderate	Unaware		Partnership
Example Client	Doe, Jane	4/8/2015	Chief Management Officer	3-Medium	2-Moderate	2-Moderate	Partnership		Partnership
Example Client	Doe, John	4/9/2015	HR Director	3-Medium	2-Moderate	2-Moderate	Partnership		Sponsorship
Example Client	Doe, Jane	4/10/2015	Program Analyst	3-Medium	2-Moderate	2-Moderate	Partnership		Sponsorship
Example Client	Doe, John	4/11/2015	Administrative Assistant	3-Medium	2-Moderate	2-Moderate	(haven't interacted)		Partnership
Example Client	Doe, Jane	4/12/2015	Executive Director	3-Medium	2-Moderate	2-Moderate	(haven't interacted)		Partnership

Risk and Issue Overview

Purpose: Risks and issues are analyzed in order to establish a point-in-time view of stakeholder concerns. These risks and issues were used to identify key risks and issues by organization

| Name	Risk/Issue	Risk/Issue Description	Date Identified	Rating
Doe, Jane	**Risk**	Description of risk	11/21/2014	Medium
Doe, John	**Risk**	Description of risk	11/21/2014	Medium
Doe, Jane	**Issue**	Description of issue	11/21/2014	High
Doe, John	**Risk**	Description of risk	11/13/2014	High
Doe, Jane	**Risk**	Description of risk	11/13/2014	Medium
Doe, John	**Risk**	Description of risk	11/12/2014	High

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Module 5: Implementation Management

Implementation Management

The Implementation Management Model consists of 2 units:

The first unit covers how to manage and track the implementation

Implementation	Closing

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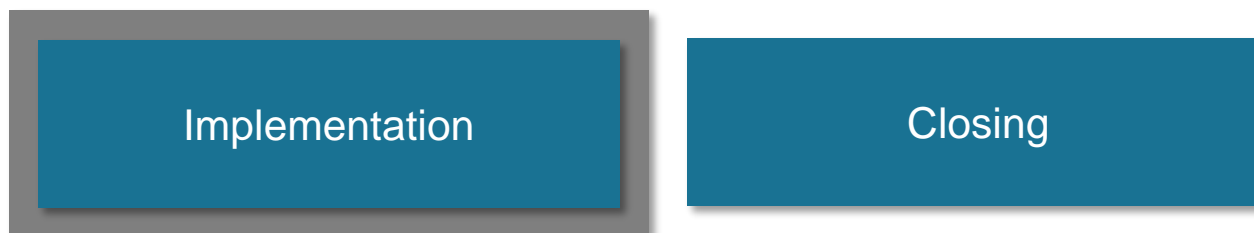
Implementation Management Learning Objectives

After This Unit, You Can:

- List the project management components that need to be monitored and tracked, and explain how to monitor and track each

- Understand the impact tracking and monitoring can have on other PM phases

- Use a Project Status Report in a real-life situation

- Understand why the work done during closure is important to a high-performing organization

- Identify the role of Lessons Learned as inputs and outputs

The Project Manager's Role in Implementation

During implementation, project managers are responsible for the ongoing monitoring and tracking of project components

Track: A fact-finding process that records planned vs. actual
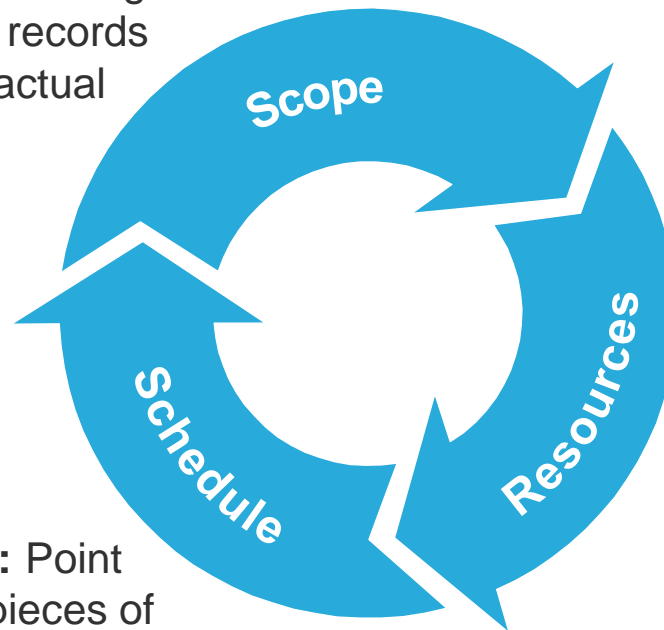
Implementation: Point where all of the pieces of a project are integrated.

Scope

Resources

Schedule

Monitor: Process of analyzing outputs of tracking

Implementation Tracking

Tracking and monitoring is an important step in implementation tracking and allows teams to do the following:

- Identify issues in advance situations where corrective action is required

- Stop issues from turning into bigger project risks

- Predict what may happen in the future if present conditions continue (forecasting)

- Gather information necessary for recording development effectiveness

Critical Tracking and Monitoring Components	
Scope	Current activities, planned activities and any additions or changes to the planned activities
Activity & Schedule	Comparing the planned schedule to the actual progress to determine current position
Resources	Tracking the time resources are spending on the project for the purposes of tracking the budget

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Component #1: Scope

The project scope is the total amount of work that needs to be completed to accomplish the project's objectives

Scope Control	• Tracking and monitoring the scope to ensure that any changes incorporate only what is critical to achieving the project goals • Collecting frequent status reports from consultants to monitor scope

Scope Creep	• Any changes to the planned activities and approach to executing the project • Review if the scope creep is critical to project's success • Review the impact of project scope changes on timelines, resources, cost, and risks

Component #2: Activity & Schedule

In order to track activity and schedule progress, performance should be reported against the baseline created during the planning phase

Steps for Developing Baseline Schedule:

1. Review planned activities
2. Determine what work has been done to complete activities
3. Analyze planned versus actual work
4. Compare to planned start and finish dates and determine any adjustments
5. Analyze dependencies and impact on other tasks and make necessary adjustments to target dates

#	Activity	Dependency	Planned			Actual			Target		
			Start	Finish	Duration	Start	Finish	Duration	Start	Finish	Dur
1a	Gather data and content	None	1/15	1/16	2 days	1/15	1/20	6 days	1/15	1/20	6 days
1b	Develop draft	(1a, FS)	1/18	1/24	7 days				1/21	1/27	7 days
1c	Draft review	(1b, FS)	1/25	1/26	2 days				1/28	1/29	2 days
1d	Incorporate edits and finalize	(1c, FS)	1/27	1/29	3 days				1/30	2/1	3 days

Component #3: Resources

Monitoring the budget involves tracking the project's costs and work performed in order to manage changes to the cost baseline

Limitations of Traditional Planned vs. Actual Results

Monitor Planned vs. Actual Costs	• Project may be progressing on budget but behind/ahead of schedule

Monitor Planned vs. Actual Work Performed	• Project may be progressing on schedule but over/under budget

Monitoring Implementation: Status Reports

Status reports help keep staff on track, keep others informed of progress and enable input collection when needed

Project Status Summary

Overall Project Status	R		Scope	Resources	Schedule	Quality
	-		Y	R	G	Y
			=	=	+	-

Project Trends Key

+ Trending Up (Improving)	= Flat Trend (Steady)	- Trending Down (Declining)

Project Status Summary	• Describe project progress against critical path. • Explain changes in project ratings or trends above. • Summarize key highlights for the reporting period. • Etc…

Items Needing Leadership Attention

Reques ID	Description	Priority/ Severity	Target Resolution Date
Risk XX	Risk description…	Critical	17-May-2013
Issue XX	Issue description…	Critical	01-Jun-2013
Decision XX	Decision description…	High	17-Jun-2013

Upcoming Deliverable and Key Milestone Status

Deliverable / Milestone Name	Progress	Baseline Finish Date	Planned/Actual Finish Date	Status	Comments
Deliverable 1		18-May-2013	18-May-2013	C	
Deliverable 2		21-May-2013	21-May-2013	G	
Deliverable 3		23-May-2013	25-May-2013	Y	
Milestone 1		28-May-2013	4-Jun-2013	R	
Deliverable 4		1-Jun-2013	8-Jun-2013	NS	
Etc…					

Deliverable Status and Milestone Summary Legend	NS	Not started	C	Completed	G	On track	Y	<1 week behind schedule	R	>1 week behind schedule

Status Report Benefits

1 **Focus** more on the task at hand

2 **Clarity** surrounding timing and budget constraints

3 **Record** key decisions, progress, and future tasks

4 Paint **The Bigger Picture** for internal teams to visualize overall progress

Implementation Management

The Implementation Management Model consists of 2 units:

The second unit covers the basics of Closing:

Implementation

Closing

Exit Criteria

To determine an appropriate exit point throughout the project, you may regularly ask the following questions during project milestones:

Have clients adopted the approach, successfully demonstrated results, and carry the capacity to proceed independently?

Are clients satisfied with the results, but unable or unwilling to proceed independently?

Have clients tried the approach, but failed to deliver consistent results?

Is there a lack of traction on the implemented solutions or desired plan?

Wrap-Up and Evaluation

Project Management Training Overview

Module 1

Project Design

In this unit we learned project design, logic model and WBS to create well-structured projects

Module 2

Project Planning

In the Planning unit we learned how to use activity planning and network analysis for better planning

Module 3

Resource Management & Budgeting

In the resource management and budgeting module we learned to estimate resources by type and manage costs effectively

Module 4

Risk Management

In this unit, we learned to identify, manage and continuously monitor risks
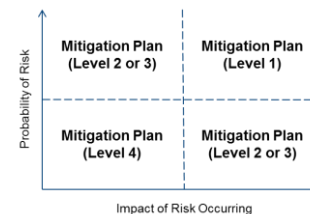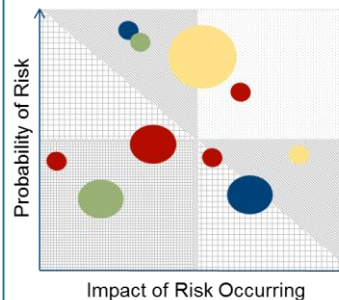
Module 5

Stakeholder Management

In this unit we learned to identify, manage and communicate with stakeholders

Module 6

Implementation

In this unit you learned to monitor and track project components, and capture lessons learned
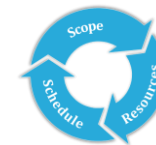
Closing Remarks

As you use Project Management methodologies within your own roles, consider the following:

1 Incorporate project management check-ups into the schedule

2 Don't forget to review and update the risk log, stakeholder analysis, and resource estimation worksheet regularly and assess impact of any changes on scope, budget and timeline

3 Remember the interdependencies between components of the project – changes in one area means changes in all areas

4 Involve stakeholders in decisions and revisions, and escalate where necessary

5 Spend the time necessary up front laying the groundwork for a successful project

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Project Management Toolkit

Logic Model

The logic model solidifies the overall project objectives to ensure any changes align with project goals and to clarify what indicators should be tracked

Budget

The budget displays key financial information and facilitates tracking
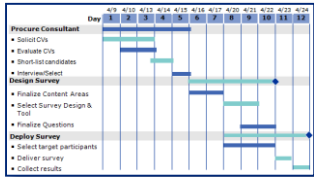
Schedule

Milestones are logical times to check progress against schedule and budget

Risk Log

Risk logs document what you did and didn't anticipate and where and what corrective action may be required

Resource Estimation Worksheet

The resource estimation worksheet documents key resource assumptions that will need to be adjusted as more information becomes available

Stakeholder Analysis & Communications Plan

The stakeholder communication plan tracks who should be informed or consulted at various junctures

Project Management Essentials

Thank You!

Please refer to the *Course Evaluation* Tab in your participant book.