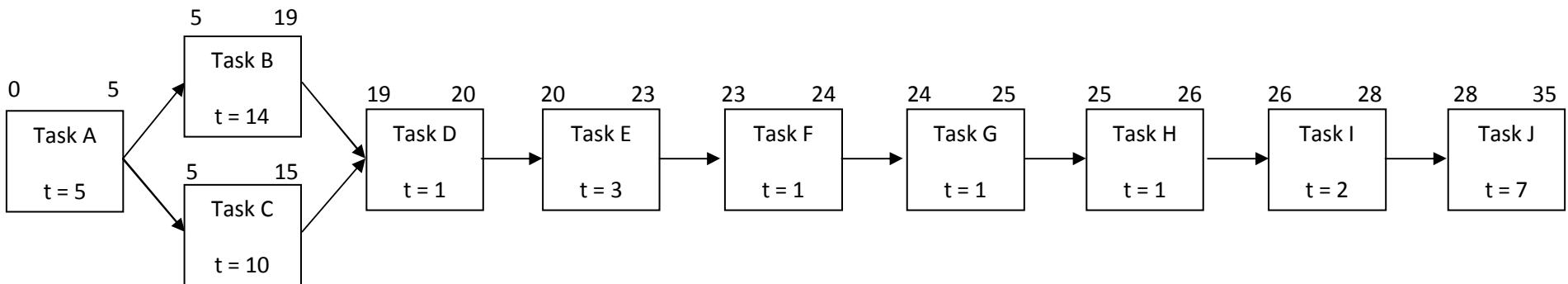


Task	Duration (Days)	Predecessors	Due Date	Possible Risk	Risk Mitigation Strategy	Comments
a.						
b.						
c.						
d.						
e.						
f.						
g.						
h.						
i.						
j.						
k.						

Deliverable/Milestone	Date

Planning

1. Identify Tasks: Please chart your tasks, durations, and predecessors on the chart provided
2. Obtain a sticky note for each task. Write the task on each sticky note, with the duration at the bottom.
3. Arrange your sticky notes in order according to task, keeping in mind dependencies. Example:



4. Now, assign due dates to your tasks by reviewing your forward pass. Keep in mind weekends and holidays.
5. Using your forward pass please identify your major deliverables/milestones and their due dates. Please document them in the chart provided.
6. Please list the direct and indirect costs associated with your project:

7. Taking into consideration the direct and indirect costs associated with your project, please estimate the cost of your project:

Project Initiation

1. Project Name:

2. Identify Needs:

3. Identify Goal

4. What are your objectives (Keep in mind SMART):

5. Identify Stakeholders:

6. Identify Other Influences on Project:

7. What performance indicators will you use to measure the success or your project? (Before and After)

8. What Resources will you need?

9. Do you have the resources you need to complete this project? If not, what resources are you lacking?

10. Are your objectives attainable? Why or why not?

Project Setup and Management

Project Management

- Application of knowledge, skills, tools and techniques to project activities to meet project requirements

4 Steps to Project Management

- Initiate
- Plan
- Implement/Check
- Act/Improve

Sample Project

- Black Tie Dinner Party
 - Hosted by ABC, Inc.
 - ABC, Inc. is a relatively new consulting company in Orlando, FL

Initiate

- Determine Needs
- Identify Stakeholders
- Create Objectives
- Identify Resources Needed

Initiate- Setting Goals & Objectives

What is the difference between a goal and an objective?

- **Goal** (an observable and measurable end result)
 - We want to aim our resources and efforts towards this **outcome**
- **Objectives**
 - These are the steps we need to take, in a more or less fixed timeframe, to move towards and achieve the outcome

Initiate

- Needs Assessment
 - Collect requirements to define and document the needs of your organization
 - Based on these needs, determine your goal.
 - **What are the needs of your organization?**
 - **Based on these needs, what is your goal?**

Initiate

- ABC, Inc. Needs
 - To market their services to the surrounding community
- ABC, Inc. Goal
 - To increase clientele by 25%
- Project
 - ABC, Inc. will host a black tie dinner party to market their services in hopes of increasing clientele

Initiate

- Define Objectives
 - Specific
 - Measurable
 - Agreed Upon
 - Realistic
 - Time-constrained

Initiate

- Example of SMART Objective:
 - To achieve attendance of at least 150 guests at the black tie dinner party on 31 March 2008 by sending a promotional email to all relevant professionals by 30 November 2007.
 - To achieve a satisfaction rate of 85% of all guests at the black tie dinner party on 31 March 2008 by providing food, entertainment and atmosphere appropriate for the event.
 - **What are the objectives for your project?**
 - **What performance indicators will you use to measure the success of your project?**

Initiate

- Identify Stakeholders
 - Who gets the output from the project?
 - Who provides the input?
 - Who has oversight?
 - Who has other related responsibilities?
 - Who reaps the rewards?
 - Who suffers the penalties?
- Who are some of the stakeholders in your projects?

Initiate

- ABC, Inc. Stakeholders
 - ABC, Inc. Executives and Managers
 - Potential Clients
 - ABC, Inc. Employees
 - Guests at the Dinner Party
 - Other Consultation Companies

Initiate

- Identify other Influences on the Project
 - Internal Factors
 - System
 - Organizational structure
 - Culture
 - External Factors
 - Social
 - Economical
 - Environmental
- What are other influences on your project?

Initiate

- Other Influences on ABC, Inc.
 - Culture of the Surrounding Community
 - Desire of potential clients to attend dinner party
 - The likelihood of clients to seek consultation services due to economic factors

Initiate

- Performance Indicators
 - How to measure success of your project
 - What are the performance indicators you will use in your project?

Initiate

- Performance Indicators in ABC, Inc.
 - Success will be measured by how much food is eaten, how many people attend, and how many people pick up the company business card
 - 75% of food consumed indicates success
 - 75% of invited attendees show up
 - 50% pick up business card

Initiate

- Identify Resources Needed
- Types of Resources:
 - People
 - Equipment
 - Material
 - Money/Budget
 - Time
- **What Resources will you need?**
- **Do you have the resources you will need? If not, what are you lacking?**

Initiate

- ABC, Inc. Resources Needed for Dinner Party
 - Venue
 - Waiters
 - Food
 - Entertainment
 - Decorations
 - Attendees
 - Event Planner
 - Telephone
 - Envelopes and Stationary
 - Etc.

Planning

- Purpose is to provide guidance for identifying those activities that define and refine project objectives
- When planning, involve and/or consider all project stakeholders and external factors

Planning

- Identify Tasks
- Create a Schedule
- Identify Milestones
- Define Roles and Responsibilities
- Identify Risks
- Develop Budget

Planning

- Identify Tasks/Activities
 - List the tasks that need to be complete for your project

Planning

- ABC, Inc. Tasks/Activities
 - Create Guest List
 - Reserve Venue
 - Reserve Music Entertainer
 - Arrange for setup of food, equipment, staff, etc.
 - Send Invites
 - Oversee setup at Venue
 - Launch Event
 - Tear down/Clean up
 - Pay for Services
 - Send Thank You Notes to Attendees

Planning

- Activity Sequencing
 - This involves identifying and documenting the relationships among activities.
- Activity Duration Estimating
 - Length of time it takes to complete each activity
- Chart your Tasks, Duration of each task, and task predecessors

ABC, Inc. Tasks, Durations, and Predecessors

Task	Duration (Days)	Predecessors
A. Create Guest List	5	
B. Reserve Venue	14	
C. Reserve Music Entertainer	10	
D. Arrange for Setup at Venue	1	B
E. Send Invites	3	A
F. Oversee setup at Venue	1	B
G. Launch Event	1	F
H. Tear down/Clean Up	1	G
I. Pay for Services	2	H
J. Send Thank You Notes to Attendees	7	G

Planning

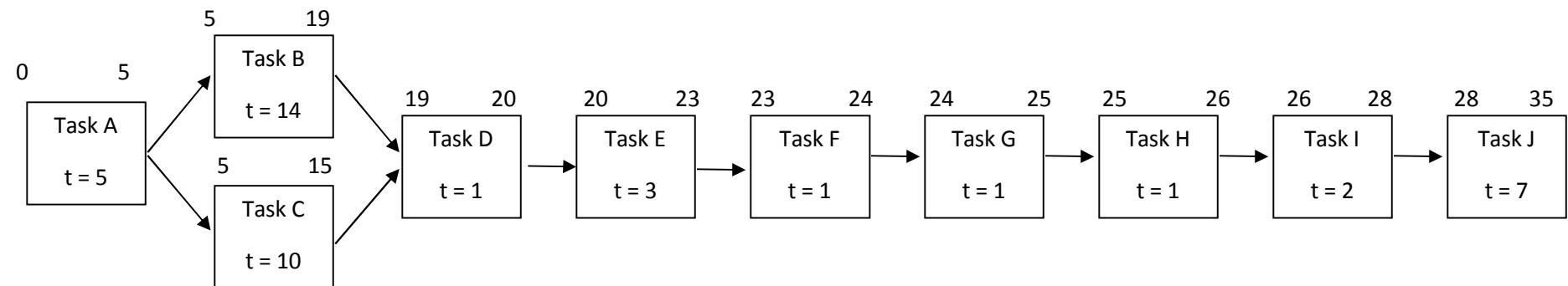
- Forward Pass
 - In project management, scheduling from a known start date and calculating the finish date by proceeding from the first operation to the last. Also known as forward scheduling.

Planning

- Using your stick notes, create a forward pass for your project
 - By path, start at the beginning, add all durations together
 - Result: Duration of the project and critical path identified
 - What does the forward pass look like for your project?
 - What is the Critical Path?

Planning

- ABC, Inc. Forward Pass
- Critical Path is A → B → D → E → F → G → H
→ I → J



Planning

- Next, assign due dates to your tasks by reviewing your forward pass
 - Keep in mind weekends, holidays, etc.
- Identify Deliverables and due dates by looking at your chart
- Identify important milestones
- **What are the Due Dates for your tasks? What are important milestones?**

Task	Duration (Days)	Predecessors	Due Date
A. Create Guest List	5		9/17/2012
B. Reserve Venue	14		9/28/2012
C. Reserve Music Entertainer	10		9/24/2012
D. Arrange for Setup at Venue	1	B	10/1/2012
E. Send Invites	3	A	9/21/2012
F. oversee setup at Venue	1	B	10/3/2012
G. Launch Event	1	F	10/4/2012
H. Tear down/Clean Up	1	G	10/5/2012
I. Pay for Services	2	H	10/7/2012
J. Send Thank You Notes to Attendees	7	G	10/16/2012

Planning

- Project Risk
 - Uncertain event or condition that, if occurs, has a positive or negative effect on a project's objectives
 - Probability of the risk event occurring
 - Impact (consequence) of that risk event's occurrence
 - **What are some of the risks in your project?**

Planning

- ABC, Inc. Risks
 - Fewer than 150 guests RSVP by the deadline
 - Desired venue is not available
 - Host is ill on day of dinner
 - Can you think of any others?

Planning

- Based on the assessment of probability and impact, you should prioritize the risk by:
 - Best utilizing the available resources
 - Addressing the highest impacting events first, then address the remaining lower impacting events as time and resources allow

Risk Mitigation

- Actions and control measures that are put into place to reduce or eliminate risks associated with project
- Please document how you will mitigate your risks

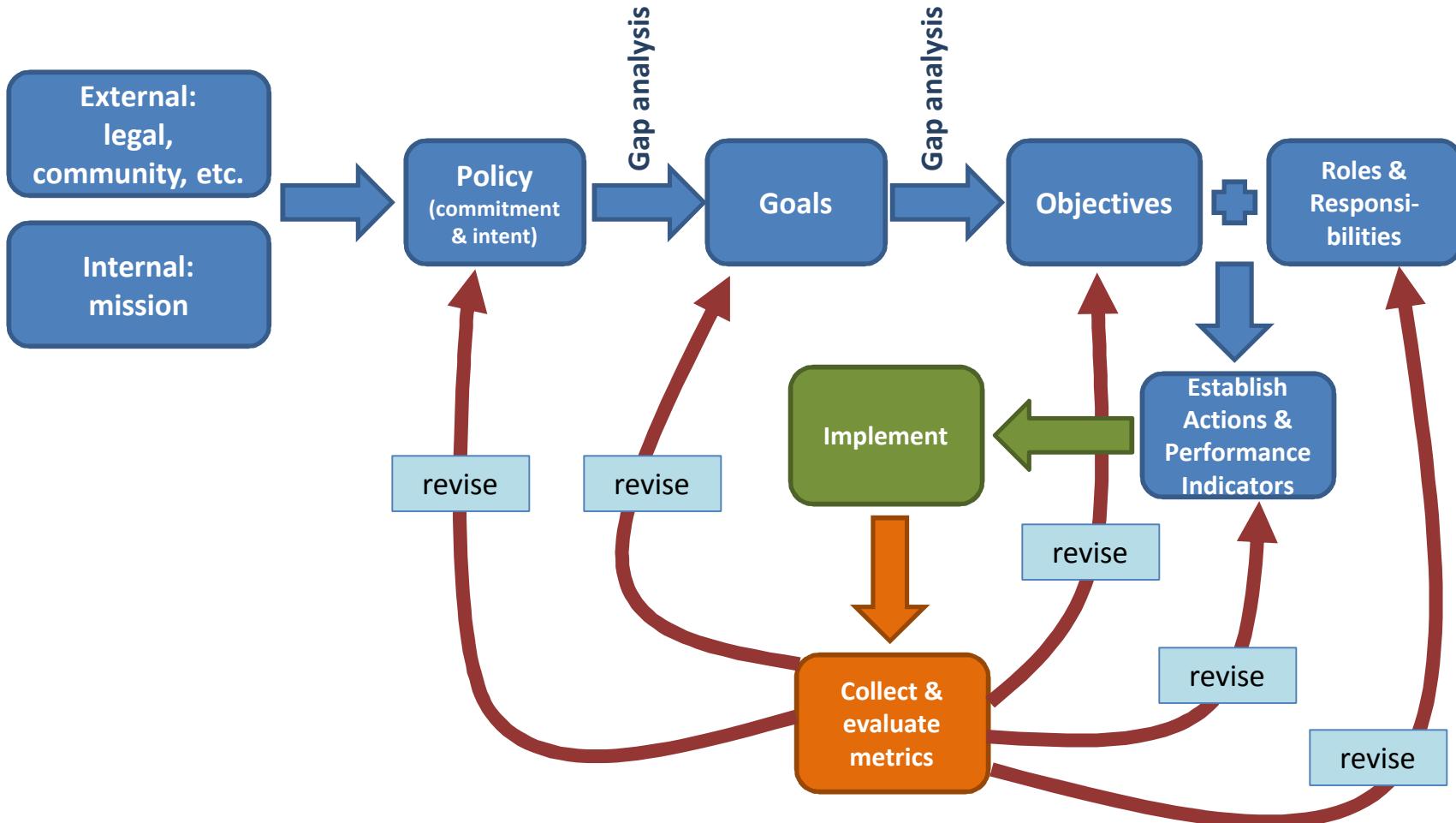
Planning

- ABC, Inc. Risk Mitigation
 - Fewer than 150 guests RSVP by the deadline
 - After sending out the mail invitations, begin calling guests that have not yet RSVPed
 - Desired venue is not available
 - Research at least three possible venues within budget
 - Host is ill on day of dinner
 - Ensure there are at least two hosts from ABC, Inc.

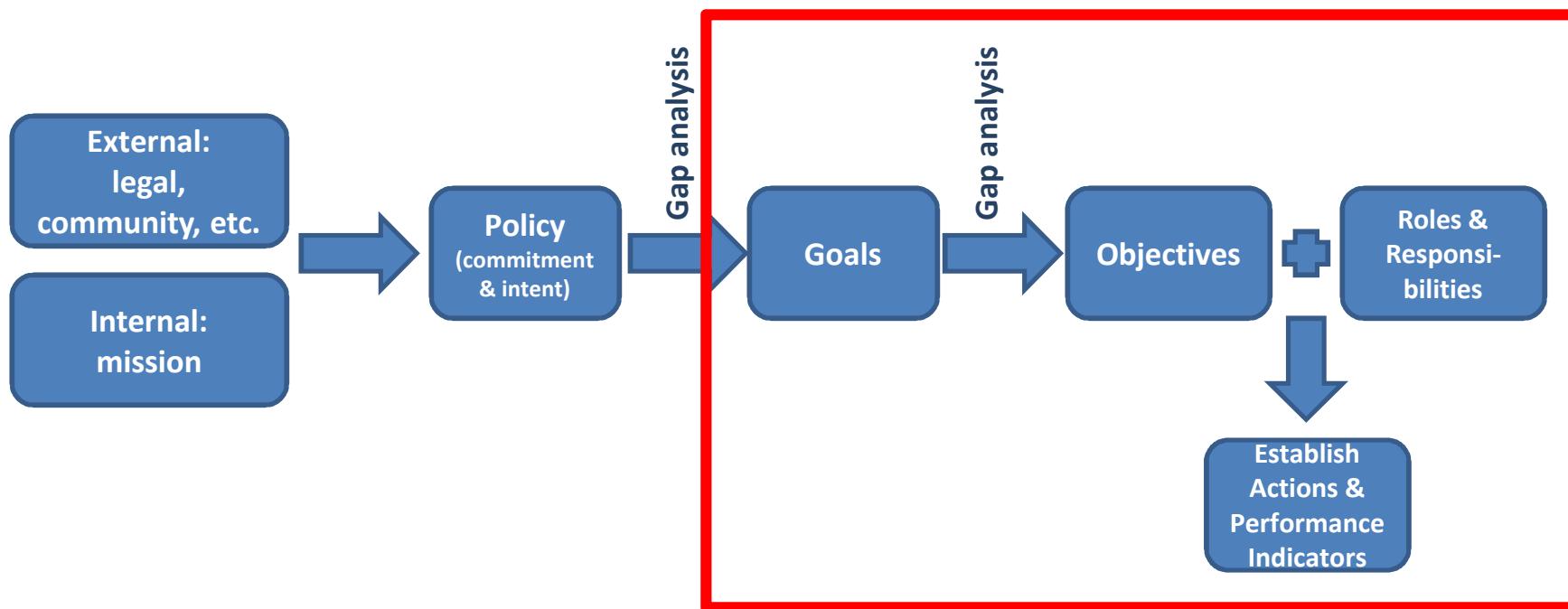
Planning

- Develop a Budget
 - Direct Costs (traceable)
 - Labor
 - Materials and Equipment
 - Fees, Travel, Incidentals
 - Indirect Costs (overhead)
 - General Administrative
 - Marketing and Sales
 - Research and Development
 - **Taking into account Direct and Indirect costs, please create a cost estimate for your project**

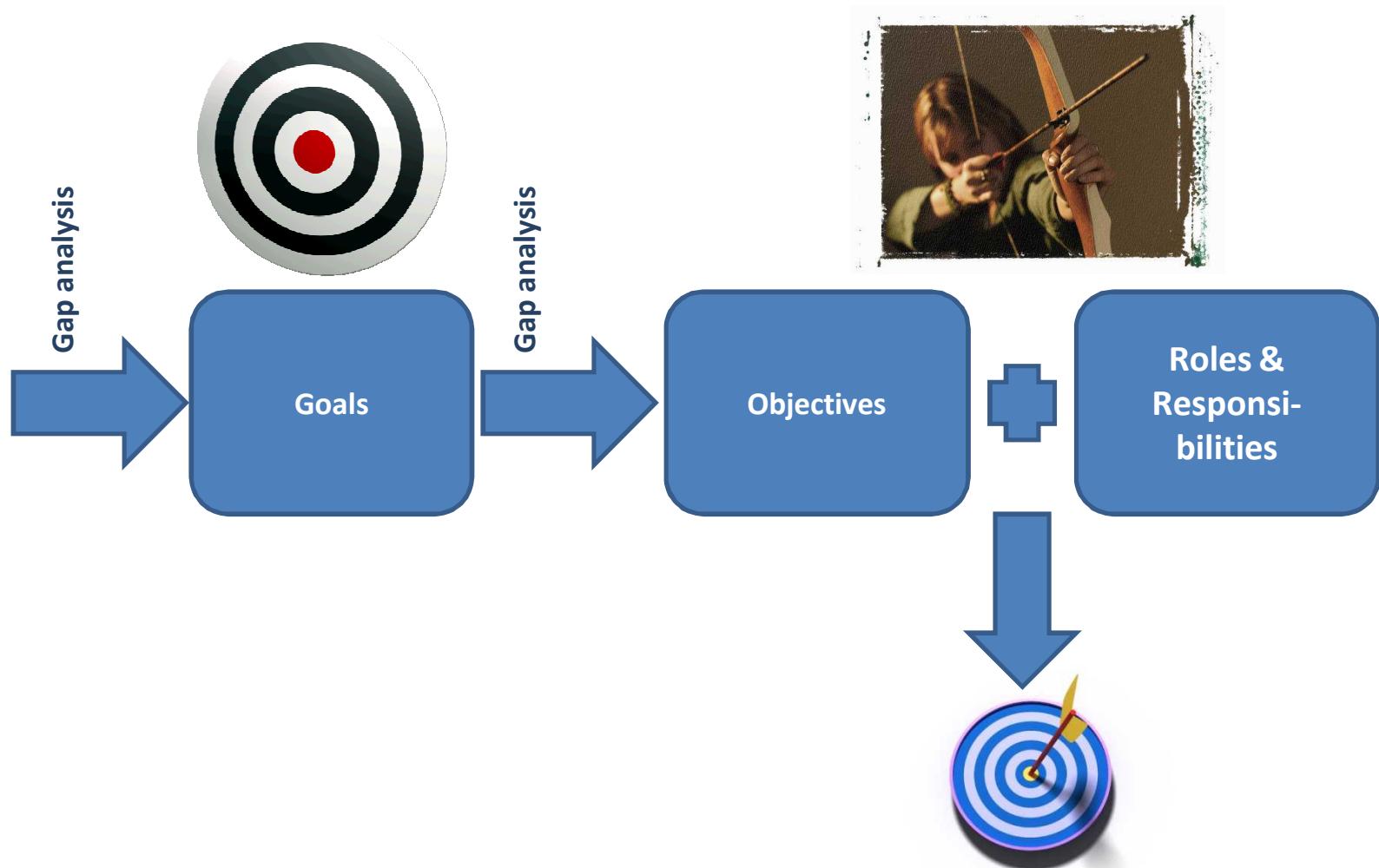
Plan-Do-Check-Act



Plan



Goals, Objectives, Roles, & Responsibilities



Roles & Responsibilities (R&R)

- You have your target (**goal**).
- You have your arrows (**objectives**).
- Now, you need an archer to direct the arrow towards the target.
(Role)
- And instructions on how to direct the arrow (**Responsibilities**)
- Please indicate Roles and Responsibilities for your project



Check

- Performance
 - The implementation of the entire biorisk management system, including evaluating and ensuring that the system is working the way it was designed. Another aspect of performance is the process of continually improving the system.

Check

- Continuously assess Project Status
 - Time
 - Cost
 - Scope
 - Resources
 - Quality
- How are your Performance Indicators Doing?

Check

- Indicators That Corrective Action is Needed
 - Schedule Slippage
 - Over Budget
 - Inability to Resolve Problems Quickly
 - Insufficient or High Turnover in Resources
 - Unmanaged Changes in Scope
 - Quality Problems Resulting in Excessive Work
 - Changes in Customer or User Requirements

Check

- Performance Reporting
 - During Quarterly Meetings, report:
 - What/how you have done since the last report (status)
 - What you anticipate in the near future (forecast)
 - Any critical issues or problems encountered and corrective action taken
 - Other Key Information

Check- Review and Revision

Discussion:

Goals & objectives will change over time.

- What are some **reasons** that they will change?
- How do you know when it is time to **review** and, possibly, **revise** goals & objectives?
- What **steps** should you take to review and revise goals, objectives, roles, and responsibilities?

Act

- Does your project need to be changed or re-evaluated? If so, come up with alternative plans.
- Example: ABC, Inc. learns of a few guests who have dietary restrictions. Result: Change the menu.

Quarterly Reporting Sheet

1. What/how have you done the last report? (Status)

2. What do you anticipate in the near future? (Forecast)

3. Are there any critical issues or problems encountered and what corrective action has been taken?

4. What task are you currently on? Are you on schedule, behind schedule, or ahead of schedule?

5. How are your performance indicators measuring?
