

# TOTAL SYSTEMS EDUCATION, LTD.

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TSE001A

## PROJECT PLANNING AND CONTROL (*The Foundations of Project Management*)



### Course Description

Managing a project carries complex concerns, not always found in traditional management. This workshop enables participants to learn and practice the tools and techniques needed in the Project Manager/Leader roles. The *Best Practices* for negotiation; communication; risk management; change management; and coordination between the Project and Management, Clients/Users, Team Members and Support Groups are covered in great detail. The course enables participants to identify and execute appropriate planning, organizing and controlling steps for projects, while ensuring *Quality*, the first time.

*This program is for anyone managing a portion or entire project in an organization (hierarchy, matrix or global task force), with shared or part-time resources, **all** with shifting priorities!*

Upon completion, participants involved with PMI® and the Project Management Institute's Project Management Professional (PMP) program, are awarded **16 PDUs** or Contact Hours. **Our PMI REP Code is 1270.**

This special two-day version of PP&C is intended for those clients with serious time constraints. The same tools and topics of our TSE001 workshop are taught but with less practice and fewer workshops. Upon completion of this course, each participant will be able to:

- ◆ Develop Project and Phase Plans;
- ◆ Estimate work effort, resources and schedule for successful completion of a Project;
- ◆ Negotiate with support groups; make staff assignments and schedules for Effective utilization of project resources;
- ◆ Understand the management issues and techniques needed in Cross Functional-Task Force, Matrix and Hierarchy project teams. Delegate work, and motivate and facilitate professional and personal growth;
- ◆ Implement a Change Management and reporting plan;
- ◆ Track and Report the status of the project and deliverables for early problem identification and resolution;
- ◆ Identify and Plan to mitigate Project and Product Risk factors;
- ◆ Understand and Employ *Product Scope* and *Quality Management*;
- ◆ Understand the use of project software tools to help Plan, Organize, Schedule, Control, Track and Report projects.

Instructional methods for this 2-day course are lecture, discussion, detailed case study workshops and presentations. Upon request, demonstrations of *Microsoft Project™* are included in the program as are references to the PMI® PMBOK (Project Management Body of Knowledge), Six Sigma and in-house Standards and Policies.



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### Course Outline

#### I. Introduction and Course Objectives

#### II. Project Management Concepts

- A. Process vs. Project Management
- B. Project Characteristics
- C. Blueprint for Effective Project Management
- D. Agile Project Management
- E. The Project Manager's Responsibilities
  - 1. Establishing Success Factors
  - 2. Objectives / CBA
  - 3. Critical Communications / Negotiations / Stakeholders
    - a. management
    - b. team members
    - c. users / clients
    - d. support groups / interfacing projects
  - 4. Managing the Total Systems Pentagon  
(*People, Time, Budget, Technology and Scope*)
- F. Proactive Project Management  
(*and the Rules we live by!*)
- G. The Role and Impact of PMI® the Project Management Institute

#### III. Project Planning

- A. Planning Responsibilities
  - 1. The Work Plan
  - 2. The Organization and Staffing Plans
  - 3. The Execution, Control and Tracking Plans
  - 4. The Scope Management -- Change Control Plan
- B. Establishing the Work Plan
  - 1. Product Definition (Deliverables)
  - 2. Work Breakdown (WBS) / Task Definition
  - 3. Project Risk Management
  - 4. Selecting Product Development Tools (Quality Management)
  - 5. Dependency Diagramming (Network, PERT & CPM) Mechanics
  - 6. Gantt Charts (Schedule) and Software Tools
- C. Schedule Estimating (Base Work Effort) -- Project Time Management
  - 1. Estimating Methods (*Good and Bad!*)
    - a. bulk, SWAG and Delphi (Wideband)
    - b. consensus
    - c. PERT formula / ratios
    - d. historical comparative
  - 2. Function Point Analysis and Software Aids
  - 3. Real World, Estimate Loading Factors and Justification
    - a. environmental
    - b. staffing
- D. Now we have a plan, What do we do with it?
- E. Packaging the formal Project Plan
- F. Making a Management/Client Presentation and Gaining Approval



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### Course Outline Con't.:

#### IV. Scope Management -- Project Change Control

- A. Planning for Change - *Staying Proactive*
- B. Objectives of a Change Control Plan
- C. Establishing the Change Request Policy
  - 1. Initiation of the Request and *Determining its priority*
  - 2. Evaluating the Request (and by Whom)
  - 3. Recommendations and Decisions
  - 4. Allowing Appeals
- D. Change Control Metrics
  - 1. As a Productivity Measure
  - 2. As a Quality Measure
  - 3. As Input to a Redevelopment Effort

#### V. Project Organizing and Managing the Team – Schedule and Resource Management

- A. The Project Manager as a Manager - The Responsibilities
- B. Steps in Assigning and Scheduling the Team
  - 1. Creating a Skill/Knowledge Matrix
  - 2. Activity and Personnel Assignments
  - 3. Career Path Planning
- C. Using the Critical Path Method (CPM)
  - 1. Very Important Dates
  - 2. Who is/should be, assigned to the Critical Path?
  - 3. The Critical Path as a Motivator
- D. Roles and Responsibilities
- E. Load Leveling the Assignments
- F. Developing “Plan B” and Developing “Outside the Box” Solutions
- G. Establishing Project Team Procedures and Communications
  - 1. Internal / External / Clients
  - 2. Management
  - 3. Support Groups
- H. Project Team Structures and Issues - The Options
  - 1. Hierarchy
  - 2. Matrix
  - 3. Cross Functional -- Task Force
- I. Managing and/or Working in a Matrix or a Cross Functional Task Force
- J. Multiple Projects and Shared and Borrowed Staff  
(*The Real fun begins!*)
- K. Used Properly, Software Tools will Help
- L. Communications Management -- The Status Reporting Plan
  - 1. Selecting the proper format  
(*Meeting and/or Reports*)
  - 2. Frequency
  - 3. Responsibility
  - 4. Doing it the Right Way



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### Course Outline Con't.:

#### VI. Project Execution, Monitoring and Control

- A. Control Objectives
- B. Identifying and Using the Progress Control Tools
- C. Developing a Progress Reporting Plan  
(What you should Track, and shouldn't!)
  - 1. Completions, Starts and Work Effort
  - 2. Estimates **TO** Complete
  - 3. The True Meaning of Percent Complete (and the 90% Complete Syndrome!)
  - 4. Budget Tracking and Control
  - 5. The Myth of the "Man-Month"
  - 6. What YOU Need to know ASAP, and HOW
- D. Controlling your Support Groups and Extended Team
  - 1. Status Meetings that Control
    - a. planning and running the meeting
    - b. reporting to management
    - c. gaining support and commitment
  - 2. Control an the "Task Force Project"
- E. Product Quality, Six Sigma™ and ISO9000  
(Building and Measuring)
  - 1. Development tools for Quality and Success
  - 2. Error prevention, detection and correction techniques
  - 3. The Importance of Metrics
- F. Productivity Tools and Measurements
- G. Software to Help Monitor and Control the Project  
(Increasing the Project Manager's Productivity, Control and Reporting Capabilities)
- H. Replanning - When to Change, Who to Tell, and How
  - 1. What are the options / alternatives?
  - 2. Making the right decisions
- I. Escalating Issues to Management  
(How to avoid - "Shoot the Messenger!")

#### VII. Conclusion

- A. Project Closure and the Post Project Review
- B. Implementation Plan for Projects
  - 1. New Projects (Big and Small)
  - 2. Maintenance Efforts
  - 3. Joining a Project  
"already in progress"
- C. Exercise: "Identify Internal Issues which may Impede Project Success"  
Process: "What Participants can do to Resolve the Issues"
- D. Review Major Topic/Objectives
- E. The Global Benefits of PMI® and your Local PMI Chapter
- F. Participants Critique Class

