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# Project Management for Managers & Supervisors

Sample Program

## About These Samples

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The following samples are from a 1 to 2 day program entitled "*Project Management for Managers and Supervisors.*" The program is designed to teach Managers and Supervisors the basics of project management. Being able to use basic project management skills is a key competency for Managers and Supervisors when faced with the responsibility of managing non routine projects in their groups.

Included for evaluation purposes are:

- A Course Overview describing the format and objectives of the full course.
- A Sample Module containing the program's introduction and 1<sup>st</sup> Module covering how to define the project's scope, objectives, critical success factors and key stakeholders. Included in the sample module are:
  - The module's Slide Presentation
  - The module's concluding exercise requesting participants to develop a set of project requirements for a sample case

## **Project Management for Managers and Supervisors Course Overview**

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**Note:** This sample is provided for evaluation purposes only. It provides an example of the type of course overview **KAW** recommends as an integral part of each program's design.

### **Background**

The purpose of "*Project Management for Managers and Supervisors*" is to teach Managers and Supervisors the basics of project management. Being able to use basic project management skills is a key competency for Managers and Supervisors when faced with the responsibility of managing non routine projects in their groups.

### **Learning Objectives**

The ultimate goal of this workshop is for participants to be able to use basic project management skills back at work. Specific Objectives include the ability to use the material learned in the workshop and applicable job aids to:

- Define a project's scope and objectives
- Identify Key Critical Success Factors
- Identify Key Stakeholders whose support and/or buy-in is critical for project success.
- Identify Key Project Elements and Tasks
- Identify Needed Resources and Assign Responsibilities
- Develop a Project Schedule
- Monitor Project Status and Take Appropriate Corrective Actions
- Communicate/and or report project status and issues to Management and other key stakeholders

### **Topics**

To accomplish this purpose the course covers the following topics:

- What is Project Management and what defines a Project?
- What are the key phases of managing a Project?
- Defining the Project's Scope/Purpose, Objectives, Success Criteria and Critical Success Factors
- Identifying Key Stakeholders and Coordination Requirements
- Project planning tools
- Identifying Key Project Elements and Tasks (Work Breakdown)

## **Project Management for Managers and Supervisors; Course Overview**

- Identifying Needed Resources
- Assigning Project Tasks
- Developing a Project Schedule (Network Diagrams and Gantt Charts)
- Monitoring the Project Status and Taking Corrective Action
- Project Communications

### **Course Format**

The workshop is designed in accordance with accepted “adult learning principles”. Principles applicable to “*Project Management for Managers and Supervisors*” are:

- Adult learners are goal oriented and learn with a specific application in mind. Consequently the course needs to be targeted to likely applications participants will face back at work.
- Adults bring a wealth of knowledge and experience with them that can be used in the course itself. This means the exercises can draw on the knowledge and experiences participants bring with them.

As described below, the workshop’s exercises are developed with both these principles in mind.

#### *Exercises*

Exercises will allow participants to practice their skills for each phase of the Project Management process. To accomplish this, participants will be asked to take a sample project—such as an office move, or implementation of a computer system and/or new procedures—through the entire project cycle. Exercises would *cascade*, so each exercise represents a different phase of the project cycle and builds upon the work done in the previous exercise.

For example, the first exercise in this segment would ask the participant to develop a set of project definition requirements (project definition, scope, objectives, critical success factors, etc.) for the sample project. The next exercise would present some additional data on the project, and ask the participant to develop a work breakdown of key project tasks. A third exercise would then ask the participant to take their work breakdown and develop a project schedule and responsibility assignments. A fourth exercise would ask the participant to use the output from the previous exercises and develop appropriate Gantt charts and Network diagrams.

Prior to each exercise, there will be a short Power Point presentation on how to do the work needed for that exercise.

By the completion of the exercises, participants will have experienced a complete project planning process.

## **Project Management for Managers and Supervisors; Course Overview**

### **Participant Guide**

Participants will also receive a Participant Guide to act as a resource document to reinforce the concepts presented in the workshop. Participant Guides will include:

- Copies of Power Point Presentation Slides with blank lines for making notes during the presentation.
- Copies of Exercises
- Personal Insights pages for students to record key learnings and insights from each module.
- Application Guides for major module segments that provide tips on how to apply the concepts presented in the course.



# Project Management for Managers & Supervisors



Sample Module

# Topics

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- Defining Your Project's Scope and Critical Success Factors
- Identifying Key Tasks and Who Should Do Them
- Constructing a Project Schedule
- Monitoring the Project's Status and what to do if off course

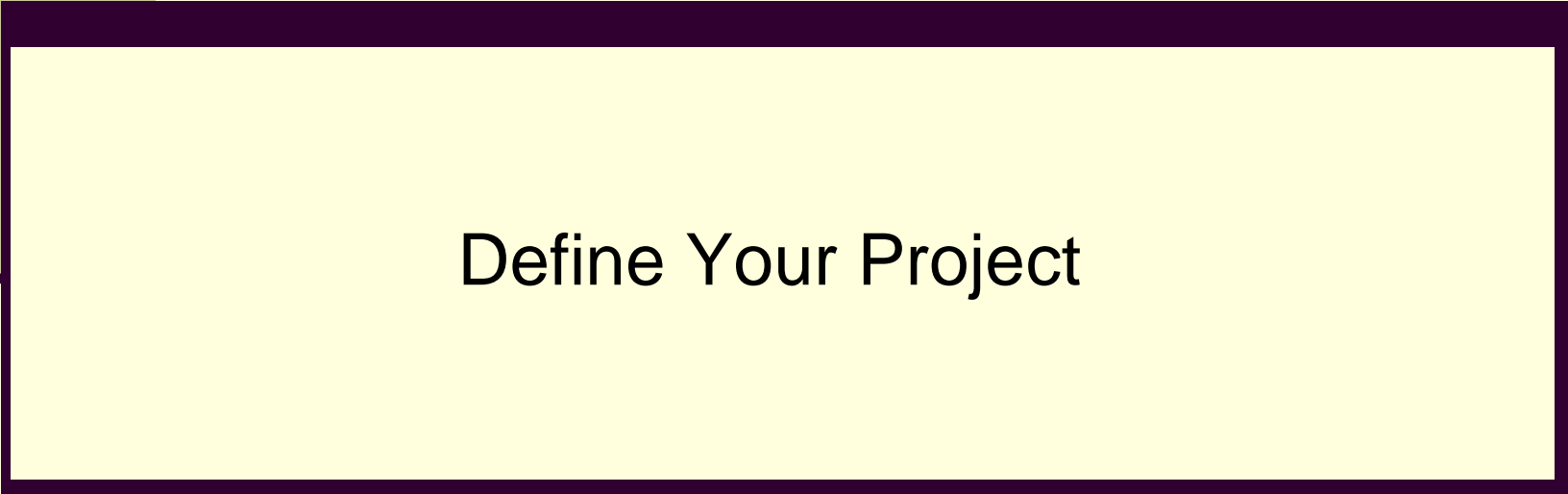


# Learning Objectives

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- By the end of the day you will be able to:
  - Explain the various phases and essential elements of a successfully managed project.
  - Understand basic project definition, planning and scheduling techniques.
  - Avoid the common reasons that projects fail.
  - Use the course material and tools in the Student Workbook in managing projects back at work.



# Module 1



## Define Your Project

# Project Definition

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- Components
  - Project Purpose and Scope
  - Project Objectives
  - Success Factors
  - Key Stakeholders
  - Coordination Requirements
  - Critical Success Factors

# Why Important?



- Project Solves Right Problem
- Project Covers Right Scope
- You know the targets you're trying to hit and how to measure if you hit them
- You know what you need for the project to succeed

# Examples of Projects with poor Definitions

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- New computer system that left out plan to train users
- Office move that left out important steps
- New personnel system that didn't coordinate deadlines with accounting system
- Plan for new road that didn't plan for community resistance and boycott

# Project Definition Elements

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- Project Purpose and Scope Statement
  - States the problem being solved
  - Gives the project boundaries
    - What's covered?
    - What's not?
  - State's project's purpose

# Project Definition Elements – Cont.

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- Project Objectives
  - States the project's desired results
  - Identifies key deliverables
  - Specifies key deadlines
  - Specifies quality expectations

# Project Definitions – Cont.

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- Success Criteria
  - States what needs to happen for the project to be a success.
  - Provides measurement criteria

# Project Definition Elements – Cont.

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## ■ Key Stakeholders

- Identifies who has a vested interest in project and can raise an issue if they don't like it.
- Identifies who needs to formally approve various project phases
- Identifies who needs informally approve or at least buy-in

# Project Definition Elements – Cont.

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- Coordination Requirements
  - Identifies who this project needs to coordinate with
  - Examples
    - Other Projects
    - Departments
    - Government Agencies

# Project Definition Elements – Cont.

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- Critical Success Factors
  - Provides the key factors required to meet project's objectives
  - Includes key resources such as money, time, people, access to people, approvals, etc.
  - Key Question: for this project to succeed and meet its objectives, it's critical that.....

# Writing the Project Definition

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- Key is to Ask the Right Questions
- Examples
  - What problem are we trying to solve?
  - What does this project need to include?
  - Who needs to buy-in to what we do?
  - Who needs to be involved?
  - What Resources do we need?
  - Who do we have to coordinate with?
  - What deadlines do we have to meet?

# Project Definition Summary

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**Project:**

**Project Scope/Purpose:**

**Project Objectives:**

**Success Criteria:**

**Key Stakeholders:**

**Coordination Requirements**

**Critical Success Factors:**

# Project Definition – Example

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- *Project:* Annual Office Managers Association Conference
- *Purpose/Scope:* Plan, market and conduct OMA's Annual conference.

# Project Definition - Example

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## ■ Objectives

- 15% increase in attendance from last 2 years.
- Conference design that provides sessions that deal with latest hot topics in office management.
- Feature nationally known “key note” speakers
- Get most of needed registrations by “early bird deadlines.
- Reach new audiences of potential attendees.

# Project Definition - Examples

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## ■ Success Criteria

- Achieve 95% of needed registrants by “early bird” deadline
- Get needed number of attendees
- Get at least 20 attendees from “new market” areas
- 85% satisfaction level with conference quality as measured in post conference evaluation.
- Events occur on time
- Etc.

# Project Definition - Example

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## ■ **Key Stakeholders**

- Association Members
- Conference Attendees
- Speakers/Presenters
- Conference Staff

## ■ **Coordination Requirements**

- Conference Center Staff
- Speakers
- Attendees
- Conference Staff

# Project Definition - Example

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## ■ **Critical Success Factors**

- Great Conference Center in Great location
- Preliminary Conference Plan in place by...
- Availability of funds to pay for Nationally known conference speaker
- High Quality Presentations on Hot Topics
- Attractive Marketing Brochure
- Marketing Plan to reach existing members and new markets
- Etc.

## Project Definition Exercise

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**Note:** This sample corresponds to the sample Project Management module on project definition. The exercise is intended to be done after the presentation.

**Format:** Participants will work in subgroups to develop a Project Definition for a described project. **KAW Consulting** will work in collaboration with a Subject Matter Expert from your organization to customize a case so it fits the types of situations your Managers and Supervisors will actually face. Sample situations might be:

- Implementation of new procedures or a new computer system in the Manager's/Supervisor's group.
- An office move
- Implementation of a reorganization

### **Learning**

**Objectives:** Using the material taught in the course and the resource material provided in the exercise, participants will be able to:

- Develop a project scope/purpose statement
- Identify major project objectives, success criteria, key stakeholders, and critical success criteria
- Summarize the above on a "Project Definition" Template

**Instructions:** Using the background information below, and the provided resource material:

- Develop a Project Overview that includes:
  - A Project/Scope statement
  - Project Objectives
  - Project Success Measures
  - Identified Key Stakeholders
  - Key Coordination Requirements
  - Critical Success Criteria
- Summarize your work on a completed Project Definition Template
- Prepare a brief overview of the Project for the larger group.

## Project Definition Exercise

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**Resource Material:** Use the following material to help you define the various elements of the project.

### *Project Definition Questions*

#### **Scope/Purpose**

- Definition: Says what will be done; defines the project's boundaries and intent.  
Note: Definition should be broad enough to cover the real intent of the project, not just "move to a new compound".
- Key Questions:
  - Why are we doing this project?
  - What problems are we trying to solve?
  - What is the scope of the project (what does it include or not include)?
  - How does it need to align with the Department's Vision, Mission, Core Values and Strategic Goals?

#### **Objectives**

- Definition: Specifies the desired results by the end of the project and defines key deliverables.
- Key Questions:
  - What are the desired results?
  - What are the key deliverables?
  - What deadlines must be met?
  - What are the quality expectations?
  - Are there cost/budget expectations?

#### **Success Criteria**

- Definition: Specifies the results the project must achieve to be considered a success.
- Key Questions:
  - What criteria does the project need to meet to be judged a success?
  - How will we know (measure) if it meets those criteria?

#### **Critical Success Factors**

- Definition: Provides the key factors required to meet the objectives.

## **Project Definition Exercise**

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- Key Question: for this project to succeed and meet its objectives, it's critical that.....
- Includes key resources such as money, time, people, access to people, approval's, etc.

### **Stakeholders**

- Definition: Anyone who feels they have a vested interest in the project, and can legitimately "raise an issue" with the Project's impact and results.
- Key Questions:
  - Who has to formally sign off on the project plan and results?
  - Who are the indirect clients of the project that need to approve it? (Senior Mgt., other Divisions, etc.)
  - Who else needs to buy-in to the results?
  - Who will raise an objection if not considered?

## Project Definition Summary

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Project Name: \_\_\_\_\_

Prepared By: \_\_\_\_\_

Date: \_\_\_\_\_

**Project Scope/Purpose:**

**Project Objectives:**

**Success Criteria:**

**Key Stakeholders:**

**Coordination Requirements:**

**Critical Success Factors:**