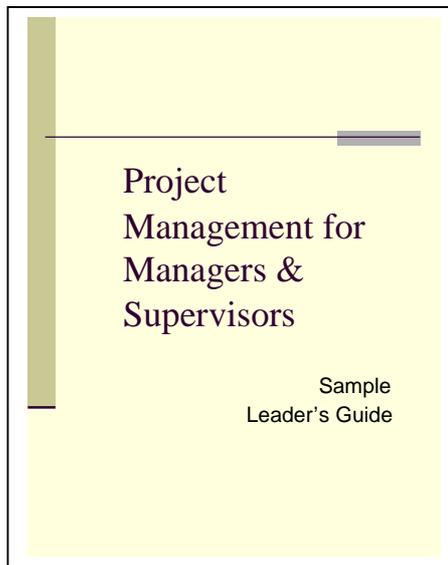

Project Management for Managers & Supervisors

Sample
Leader's Guide

Table of Contents



Introduction

Section 1: Workshop Overview

Section 2: Materials & Equipment Lists; Site Set-up Instructions

Section 3: Workshop Slides with Speaker Notes

Section 4: Workshop Exercises

Section 5: Slide Originals

Section 6: Exercise Originals

Section 7: Application Guide Originals

Section 8: Participant Manual

INTRODUCTION

One of the most challenging responsibilities for Managers and Supervisors is managing non routine projects. Whether an office move, implementing a new computer system, implementing a set of new operating procedures, or adapting to a corporate initiative such as reorganization, successfully managing a project requires using a effective project management skills.

This workshop teaches Managers and Supervisors the basic project management skills they need to successfully manage non routine projects. They will learn how 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
- Use Network Diagrams and Gantt Charts.
- Monitor Project Status and Take Appropriate Corrective Actions
- Communicate/and or report project status and issues to Management and other key stakeholders

As a Workshop Leader, you play a vital role in the success of this program.

ABOUT THIS GUIDE

This Leader's Guide provides you with everything that you need to prepare for and run a successful workshop.

Section 1 provides you with a basic overview of the *Project Management for Managers and Supervisors* Workshop. It covers:

Introduction

- The Course's Purpose and Learning Objectives
- Brief Description of Each Module

Section 2 covers your basic responsibilities as a Workshop Leader. In it you'll find:

- A description of your role and responsibilities as a Workshop Leader
- Checklists on items showing the steps you needed to do to get ready for and run a successful workshop.
- A list of needed space, materials and equipment
- Instructions on how to set-up your meeting room(s)
- A list of needed materials for the Participant Manuals and instructions on how to assemble them.

Sections 3 and 4 contain the Leader's Guide for the workshop itself. **Section 3**

contains:

- A Timing Guide showing suggested time requirements for each segment.
- Annotated Copies of the Slides that guide you step by step on how to deliver the program. As appropriate these slides contain:
 - Notes on how to display/deliver the slide.
 - Key Talking Points
 - Possible questions/reactions you might encounter from participants, and suggestions on how to respond.

Section 4 provides instructions on how to introduce administer and debrief the exercises.

Sections 5, 6 and 7 contain originals of the Workshop's Slides, Exercises, and Job Aids.

Section 8 contains a copy of the *Participant Manual*.

Section 1

Workshop Overview

Project Management for Managers and Supervisors

Workshop Overview

This section will provide a basic overview of:

- The workshop's purpose
- Learning Objectives
- Format/Design
- Modules

Example content area for each of the above topics follows.

Workshop Purpose

The purpose of this workshop 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

This workshop is designed to be X hours in length. It consists of a series of X modules. Each module contains both a Power Point presentation and an exercise to reinforce key

Workshop Overview

concepts. Note: The actual length and number of modules will be determined by the client's needs.

Modules

The X Modules of the Workshop are.....

A brief description, key topic areas and learning objectives follows:

- Module 1: Project Definition
- Modules 2 – X to be determined based on actual design of workshop in conjunction with client.

A brief description of key topic areas and learning objectives follows.

Module 1: Project Definition

Objective: Provide participants with an understanding of how to define a project's key requirements.

Topics:

- Defining the Project's Scope and Objectives
- Identifying Key Stakeholders and their role
- Identifying Critical Success Factors
- Identifying Key Coordination Requirements

Modules 2 – X: To be developed based on actual design.

Section 2

- Material & Equipment Needs
- Site Set-Up Instructions

Project Management for Supervisors and Managers

Materials and Site Preparation Specifications

Note: This page will list needed information on:

- Meeting Room Specifications including break-out rooms if appropriate
- Needed Equipment and Materials
- Meeting Room Set-Up
- Participant Materials and expected assembly/gathering requirements by Workshop Leader if appropriate.
- Contact Information for ordering needed materials from Corporate in appropriate.

Section 3

Workshop Slides with Speaker Notes

Project Management for
Managers & Supervisors

Sample Module

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Sample Speaker Notes

Open the Session

- Have slide showing when you start the session.
- Welcome participants.
- Introduce Yourself
- Have Participants introduce themselves briefly (Name, Group, Position, etc.)
- Take Care of Housekeeping issues.

Talking Points:

- Today, we'll be covering the basics of Project Management.
- The intent of this workshop is to help you develop the basic project management skills needed to effectively manage the types of projects that you face as a Manager or Supervisor.

Possible Reactions from Participants

- To be developed based on information from client during Needs Assessment.

Topics

- 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

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2

Talking Points

- Our topics for today are:
 - Read Slide Bullets
- Go to next slide

Possible Reactions from Participants

- Participants may ask if this course covers project management software.
- Suggested Answer: (To be developed based on actual course design).

Learning Objectives

- 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.

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3

Talking Points

- In terms of Learning Objectives:
 - Read Slide Bullets
- Ask if there are any questions on the course's topics or objectives.

Section 4

Workshop Exercises

Project Definition Exercise

Sample Workshop Leader Instructions

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

Background: The purpose of this exercise is to provide workshop participants with the chance to practice defining project requirements (project scope, objectives, critical success factors, key stakeholders, etc). This is a key first step in successfully managing a project.

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 Summary" Template

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

Timing: 40 Minutes to Complete the Exercise
10 Minute Debrief

Administering The Exercise:

- Divide the group into subgroups of 3 to 4.
- Hand out copies of the exercise to participants.

Project Definition Exercise; Leader's Instructions

- Introduce the exercise and relation to the module—it's a chance to practice defining a project.
- Review the exercise instructions and refer participants to needed resource material.
- Tell participants how long they have to work on the exercise.
- Be prepared to answer questions from subgroups on how to use the Resource Material, complete the Project Definition Summary, etc.

After the Exercise:

- Hold a ten minute discussion to go over each of the group's responses.
- Answer any questions group has on the process.

Copy of Exercise

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.

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?

Project Definition Exercise; Leader's Instructions

- 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.
- 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, approvals, 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?

Project Definition Exercise; Leader's Instructions

- 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

Project Name: _____

Prepared By: _____

Date: _____

Project Scope/Purpose:

Project Objectives:

Success Criteria:

Key Stakeholders:

Coordination Requirements:

Critical Success Factors:

Section 5

Slide Originals

Project Management for Managers & Supervisors

Sample Module

Topics

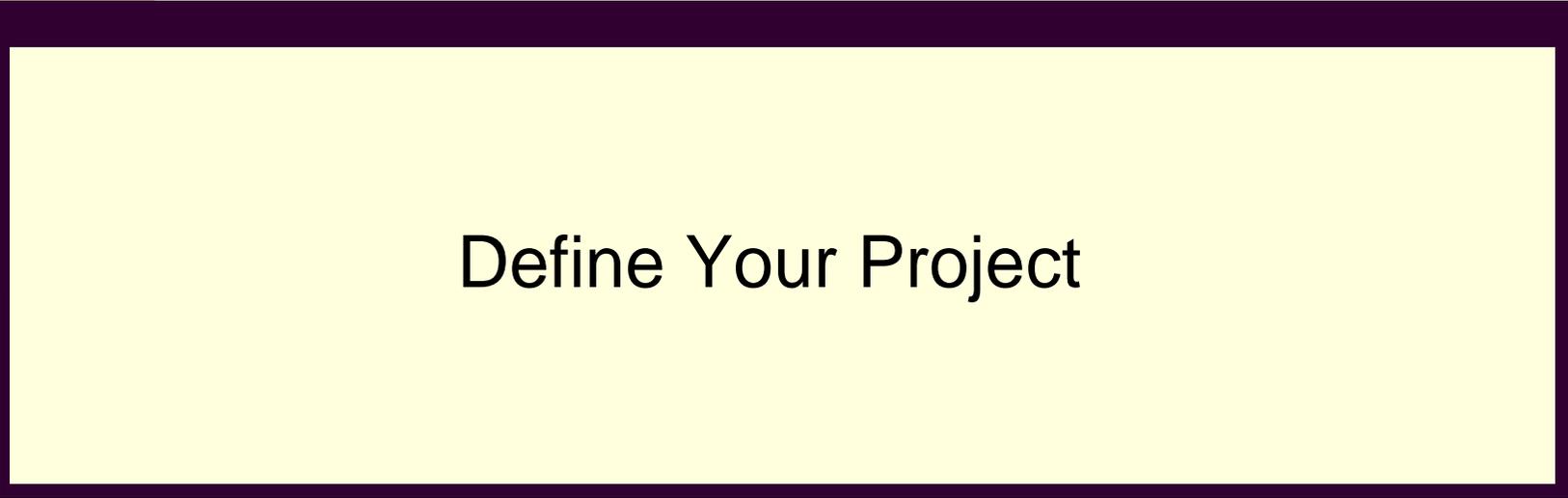
- Defining Your Project's Scope and Critical Success Factors
- Identifying Key Tasks and Who Should Do Them
- Constructing a Project Schedule
- Monitoring the Project's Status and what to do if off course

Learning Objectives

- 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

- 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

- 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

- 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.

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

Project Definitions – Cont.

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

Project Definition Elements – Cont.

■ 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.

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

Project Definition Elements – Cont.

- 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

- 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

Project:

Project Scope/Purpose:

Project Objectives:

Success Criteria:

Key Stakeholders:

Coordination Requirements

Critical Success Factors:

Project Definition – Example

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

Project Definition - Example

■ 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

■ 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

■ **Key Stakeholders**

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

■ **Coordination Requirements**

- Conference Center Staff
- Speakers
- Attendees
- Conference Staff

Project Definition - Example

■ **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.

Section 6

Exercise Originals

Project Definition Exercise

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

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

- 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

Project Name: _____

Prepared By: _____

Date: _____

Project Scope/Purpose:

Project Objectives:

Success Criteria:

Key Stakeholders:

Coordination Requirements:

Critical Success Factors:

Section 7

Application Guide Originals

Application Guides

Application Guides include items such as easy to access checklists, information on important procedural steps, flowcharts, etc. that someone can refer to when they are managing projects back at work. Examples of possible potential job aids dealing with the concepts presented in the workshop are:

- How to define the project's scope, objectives, critical success factors, etc. (see example on next page)
- How to break a project down into its various elements and tasks
- How to assign project responsibilities
- How to develop a project schedule
- How to monitor project status
- How to communicate project status
- Etc.

Application Guide # 1 Defining Your Project

One of the essential tasks of project management is defining the project's

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

This *Application Guide* provides you with some key questions to ask when defining each of these elements and a form to use to summarize your answers. Note: Think of these as “thought starters”. You’ll want to add questions of your own.

Project Definition Questions

Scope/Purpose

- Definition: Says what will be done; defines the project's boundaries and intent.
- 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?

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Application Guide

Project Definition

Success Criteria

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- Key Questions:
 - What criteria does the project need to meet to be judged a success?
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- 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?

Coordination Requirements

- Definition: Identifies who else the project needs to coordinate with.
- Key Questions:
 - What other project/efforts, if any, do I need to coordinate with?
 - What other groups (departments, sections, other government agencies, etc.) do I need to coordinate with?
 - What needs to be coordinated?

Critical Success Factors

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

Project Definition Summary

Project Name: _____

Prepared By: _____

Date: _____

Project Scope/Purpose:

Project Objectives:

Success Criteria:

Key Stakeholders:

Coordination Requirements:

Critical Success Factors:

Section 8

Participant Guide

Note: This Section left blank. See the Prototype Participant Guide submitted as part of this proposal.

Project Management for Managers & Supervisors

Sample
Participant Manual