Project Management to support the execution of your association strategy

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Professor
Solvay Brussels School
Learner Outcomes

1. Learn how to link your association’s vision & strategy to its execution

2. Learn the frameworks and best practices to run your projects

3. Learn the best collaboration tools to support your project execution
• With more than 20 years business experience, including 12 years of consulting, Frederic acquired a broad expertise in Project & Portfolio Management (PPM) by implementing PPM best practices, methods & tools for major international private & public institutions.

• He is now part of the Transformation Office of BNP Paribas Fortis where he is Head of Agile Project & Portfolio Management Tools.

• He is also professor at the Solvay Brussels School of Economics & Management for Executive Programs, including the **Executive Master in International Association Management.**

• He holds a master degree in Economics and a postgraduate master degree in Management of Information Technology.

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Info session 20/03/2018 at 18:30
Context
The world is changing fast …

Millennials will never know the link between these two
... faster than we think
The way you organize your Association is evolving ...
... and the services your Association provides will evolve too
You constantly need to adapt your vision to your business context
From your vision to its execution
This summit to shape your association vision & strategy

Crowdsourced Strategies for Sharing Resources among Associations

The Age of Business Event Engagement: An Audience Centric Approach to Building Community

Technology Strategies for Today and Tomorrow

Engaging Event Strategies

Growth strategies for associations

Strategies for Managing Change within Successful Associations
From strategy to execution

- New service launch
- Review your funding model
- Expand in Europe:
  - France (year 1)
  - Germany (year 2)
  - Italy (year 3)
- 10% Cost reduction in 2 years:
  - Outsource accounting
  - Implement IT system
  - Optimise process

Roadmap:
- Project A
- Project B
- Project C
- Project D

Capacity:

Monitor & control
review & adapt
Typical selection criteria for Projects

- **Return on investment**: 48.5%
- **Cost savings to the company**: 52.3%
- **Cost avoidance**: 30.8%
- **Risk mitigation or avoidance**: 30.8%
- **Compliance or regulatory requirement**: 39.2%
- **Competitive differentiation to the enterprise**: 38.5%
- **Market share**: 32.3%
- **Revenue growth**: 54.6%
- **Corporate innovation**: 25.4%
- **Organizational agility**: 24.6%
- **Aligns with corporate strategy and goals**: 64.6%

Source – Gartner Inc. 2008
Portfolio Top Down / Bottom Up Approach

**Bottom-up**

1. Define goals, demand, resource supply, constraints
2. Select/Prioritize projects, Define Stages & Gates
3. Define projects, scope, Plan & Schedule resources
4. Track resources, activities, schedules, Update progress
5. Analyze portfolio trade-offs, Stage-Gate reviews
6. Review trade-offs, Align portfolio with strategy

**Top-down**

**Executive Committee**

**Investment Committee**

**Steering Committee**

**Vision & Business Strategy**

**Project Portfolio Management**

**Project & Program Management**

**Execution**

**Do the Projects Right**

**Do the Right Projects**
Executing your Project
A Project starts with a need

Life is too short to build something nobody wants

Michael Chik

42% of start ups fail because they do not address a market need

www.cbinsights.com
When Elizabeth Virdin became a project manager, she had to explain her mother what she does all day.

“I said, ‘Mom, you know when you make a lemon meringue pie? That’s a project.’”

The number of pies needed is the scope. The amount of time until they’re needed is the schedule. The ingredients are the resources, and the amount allotted for groceries is the budget. But the most important part is the taste. If the pie is a hit, it has delivered its intended value. If the guests wanted ice cream, the project would be considered a failure.

“If I delivered a project on schedule, on budget and within the right scope, and no one ever uses it, I wasted time and money,” Ms. Virdin says.
To be successful, a project must:

- deliver the **outcomes** and **benefits** required by the organisation, its delivery partners and other stakeholder organisations.
- create and implement **deliverables** that meet **agreed requirements**
- meet **time** targets
- stay within **financial** budgets
- involve all the **right** people
- make best use of **resources** in the organisation and elsewhere (capacity management)
- manage any **risks** that could jeopardise success
- take into account the **needs of staff** and other **stakeholders** who will be impacted by the changes brought about by the project (rollout – change management)
What can go wrong?

31% Critical Failures
Not even completed

53% Challenged
Typically 189% over budget

16% Success
OTOBOS (On Time, On Budget, On Scope)

1994

Source: CHAOS Report 1995 by the Standish Group
Example: Sydney Opera House

- Planned cost $A 7M (actual cost $A 102M)
- Planned duration 6 years (actual duration 16 years)
- Final design does not allow enough scenery space for opera to be fully staged

Source: David Cleland and William King
Example: Boeing 787 ‘Dreamliner’

- 15 years that Boeing did not develop a new plane.
- Project for 787 started in 2004.
- 7 years of work, 7 delivery reports, 3 years delay, 3 Program Directors.
- Break-even: year 2020 (if ever)
- The 787 consumes 20% less fuel than the similarly-sized Boeing 767. It uses composite materials for most of its construction, has a four-panel windshield and noise-reducing chevrons on its engine nacelles.

"The plane may be the best plane ever produced, but in losing money it may also be the record holder," said Adam Pilarski, a senior vice president with the aviation-consulting firm Avitas.
How to avoid project failure?

• The 2015 Standish Group Report Showed Decided Improvement in Project Success Rates From the 1995
  • Time overruns: decreased to 63% compared to 222%
  • Cost overruns were down to 45% compared to 189%
  • Required features were up to 67% compared to 61%
  • 28% of projects succeeded compared to 16%

• Why the Improvements?
  • Better tools for monitoring and control
  • More skilled PM’s, more process, more user involvement
  • And “The fact that there are processes is significant in itself.”
What is Project Management?

- Project management is a set of principles and tools for
  - Defining
  - Planning
  - Executing
  - Controlling . . . and
  - Completing a PROJECT
Why is Project Management so important?

- Project Management …
  - Organize your approach
  - Generate a credible schedule
  - Track progress and control your project
  - Identify where to focus your efforts
  - Identify problems early – before they are crises
  - Saves you TIME….MONEY

“If you fail to plan, plan to fail”

Benjamin Franklin

6P rule: Proper Planning Prevents Poor Project Performance
Project Activities and Processes

Activities / Deliverables

- Defining
  1. Goals
  2. Specifications
  3. Tasks
  4. Responsibilities

- Planning
  1. Schedules
  2. Budgets
  3. Resources
  4. Risks
  5. Staffing

- Executing
  1. Status reports
  2. Changes
  3. Quality
  4. Forecasts
  5. Risks

- Closure
  1. Train customer
  2. Transfer documents
  3. Release resources
  4. Evaluation
  5. Lessons learned
  6. Final acceptance
Project Management Frameworks
Prince2 focuses on a product-based project management view with continuous justification through a business case.

- **PRINCE2 (PRojects IN Controlled Environments)** is a process-based method for effective project management.
- Very popular across Europe
- The key features of PRINCE2 are:
  - Its focus on business justification (review your business case at each stage of the project)
  - A defined organization structure for the project management team
  - Its product-based planning approach
  - Its emphasis on dividing the project into manageable and controllable stages
  - Its management by exception
  - Its focus on products and their quality

**Components**
- Business Case
- Organisation
- Plans
- Controls
- Management of Risk
- Quality
- Configuration Management
- Change Control

**Processes and most important documents**

**Techniques**
- Product-based planning
- Change Control
- Quality Review

- Prince2 offers very specific but generic process and document flows
- Different processes operate one clear list of components and techniques
- Templates are prescribed
PMBoK (PMI) is the most recognized project management standard world-wide

- The most widely propagated project management standard from American PMI (Project Management Institute)
- PMI: the largest project management non-profit organisation world-wide (150 countries, >200,000 members)
- PMBoK = Project Management Body of Knowledge (5th edition)
- Generic framework model with focus on USA (ANSI standard)

### 5 Process Group

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<th>Knowledge Area</th>
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- PMBoK defines process groups and knowledge areas
- The processes in the Knowledge Areas can be assigned to specific process groups
- Each process is marked by clear inputs and outputs, for which PMI points out process-specific instruments and techniques
- Templates for in or outputs are not prepared, only the general content is described
All projects typically go through these five processes.
Project Management Framework
The PMBOK’s 10 Knowledge areas

- Time Management
- Cost Management
- Scope Management
- Quality Management
- Stakeholder Management
- HR Management
- Risk Management
- Communication Management
- Procurement Management
- Integration Management
#1—Project Integration Management

- Bringing it All Together:
  - Building the Project Plan
  - Project Execution
  - Integrated Change Control
- Project Management “Nerve Center”
#2—Project Scope Management

• Staying Vigilant in Defining and Containing Scope throughout the Project
  • Project Initiation
  • Scope Planning
  • Scope Definition
  • Scope Verification
  • Scope Change Control
#3—Stakeholder Management

- Managing the key individuals or organizations that:
  - Are involved in the project
  - Impact the project
  - Impact / influencing the success of the project
  - Are affected by the project result
#4—Project Time Management

- Determining What Gets Done and When through:
  - Activity Definition
  - Activity Sequencing
  - Activity Duration Estimating
  - Schedule Development
  - Schedule Control
#5—Project Cost Management

- Planning for Resources
- Estimating Costs
- Creating the Budget
- Managing/Controlling the Budget
#6—Project Quality Management

- Quality Planning
- Quality Assurance (defect prevention)
- Quality Control (defect detection)
#7—Project Human Resource Mgt

- Organizational Planning
- Staff Acquisition
- Team Development
#8—Project Communications Mgt

- Keeping Stakeholders Informed (and Involved!)
  - Communications Planning
  - Dissemination of Information
  - Progress Reporting
  - Administrative Closure
#9—Project Risk Management

• Expect the Unexpected!
  • Risk Management Planning
  • Risk Identification
  • Qualitative Risk Analysis
  • Quantitative Risk Analysis
  • Risk Response Planning
  • Risk Management and Control
Risk Log

• Objective of having a Risk Log
  – To provide a repository of information about risks, their analysis, countermeasures and status

• Content
  – Description
  – Category
  – Impact (time, cost, quality, scope, benefit, people)
  – Probability (%)
  – Proximity (e.g. 2 weeks, 1 month)
  – Counter-measures / Mitigation
  – Owner
  – Date identified
  – Date last update
  – Status

Risk Response:
  • Prevention : terminate the risk
  • Reduction : reduce the risk
  • Transference : pass the risk to a third party
  • Acceptance : tolerate the risk
  • Contingency: actions to be taken after the risk occurs
Example of a Risk Assessment Map

- Lack of visions
- Organisation unstable
- Decision processes
- Culture and cooperation
- SCOPE change because of law change
- Not enough consultant resources
- Other. SCOPE changes
- Organisation for receiving
- Communication
- Project estimates
- Not enough client resources
- Functional design
- Project estimates
#10—Project Procurement Management

- For Projects Using Outside Resources:
  - Procurement Planning
  - Solicitation Planning
  - Solicitation
  - Source Selection
  - Contract Administration
  - Contract Closeout
Knowledge Areas

Activities

Project Management

- Stakeholder
  - Identify Stakeholders
  - Manage Stakeholder Engagement
  - Plan Stakeholder Management
  - Control Stakeholder Engagement
  - Plan Procurement Management
  - Conduct Procurements
  - Control Procurements
  - Close Procurements

- Procurement
  - Plan Risk Management
  - Identify Risks
  - Perform Qualitative Risk Analysis
  - Perform Quantitative Risk Analysis
  - Plan Risk Responses
  - Control Risks

- Risk
  - Plan Communications Management
  - Manage Communications
  - Control Communications
  - Plan Human Resource Management
  - Acquire Project Team
  - Develop Project Team
  - Manage Project Team
  - Plan Quality Management
  - Perform Quality Assurance
  - Control Quality

- Human Resources
  - Plan Schedule Management
  - Define Activities
  - Sequence Activities
  - Estimate Activity Resources
  - Estimate Activity Durations
  - Develop Schedule
  - Control Schedule

- Time
  - Plan Cost Management
  - Estimate Costs
  - Determine Budget
  - Control Costs

- Cost
  - Integration
    - Develop Project Charter
    - Develop Project Management Plan
    - Direct and Manage Project Work
    - Monitor and Control Project Work
    - Perform Integrated Change Control
    - Close Project or Phase

- Scope
  - Collect Requirements
  - Create WBS
  - Validate Scope
  - Control Scope

- Define Scope
Remember: Project Activities and Processes

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Scope Management
PID or Project Charter
Project Initiation Document (PID)

- Background
- Project definition
- Acceptance criteria
- Project organization structure
- Communication Plan
- Project Quality Plan
- Project controls
- Project tolerances
- Appendices
  - Initial Business Case
  - Initial Project Plan
  - Initial Risk Log

These items are also known as « Project Governance Plan » because this part of the PID sets the operating rules of the project.

PS: for PMBoK, the PiD is called Project Charter.
Writing the PiD (1/2)

- **Background**: explain the context of the project, and how the client has arrived at the current position of requiring the project
- **Project definition**: explain what the project needs to achieve.
  - project objectives
  - defined method of approach
  - **project scope** (what is included and what not)
  - project deliverables and/or desired outcomes = products
  - constraints (something which is mandated, unavoidable, or which may prevent from delivering the Project in the most appropriate way, and which cannot be changed)
  - **assumptions** (statement that is taken as being true for the purposes of planning the Project, but which could change later)
- **Project organisation structure**: detail who is going to be involved and what their responsibilities are (team management structure and job descriptions)
  - Project board
  - Project team
- **Communication Plan**: describe how the project stakeholders will be kept informed during the project
- **Acceptance Criteria**: a prioritised list of criteria that the final product must meet before the customer will accept them; a measurable definition of what must be done for the final product to be acceptable to the customer. They should be documented in the Project Initiation Document. It should also contain the acceptance process by the client.
Writing the PiD (2/2)

- **Project Quality Plan**: define the key quality criteria, quality control and audit processes to be applied in the project to deliver products that meet the customer’s quality expectations and the supplier's quality standards.

- **Project tolerances**: permissible deviation above and below your plan’s estimate of time, cost, quality, scope, benefit, risk, … without escalating the deviation to the next level of management.

- **Project controls**: laying down how control (e.g. Change, Quality, …) is to be exercised within the project, and the reporting and monitoring mechanisms that will support this.

- **Initial Business Case**: rationale for undertaking the project and justification for committing the necessary resources. The Business Case will require regular review throughout the project and may require updating.
  - Options
  - Benefits expected
  - Risks
  - Cost
  - Timescales

- **Initial Project Plan**: high-level plan showing the major products of the project, when they will be delivered and at what cost. It also shows the key milestones, activities and resources required on the project. Can be reviewed and further developed at regular intervals during the project.

- **Initial Risk Log**: containing details of the identified risks so far. It will be reviewed at regular points during the project to assess progress on managing risks and to identify new risks that may have appeared.
Project Time Management
Planning Process
Planning Approach

1. Decompose project
2. Define activities
3. Estimate activities
4. Schedule activities

“Split as much as possible …”

“The only way to eat an elephant, is in small pieces”
Top Down Structuring

• Developing PBS
  • Decompose project goal into sub-goals, these sub-goals are **Products**
  • Check if these **Products** are operational (verifiable)
  • Divide each **Product** into **sub-Products**. If all **sub-Products** are processed the project goal is reached
  • Develop your approach successively, always one complete layer after the other
  • The result is called **Product Breakdown Structure** (PBS)
# Effort Driven Planning

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<td>Book room, beamer and flipchart</td>
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<td><strong>Phase 6: Final presentation</strong></td>
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</table>

**Duration = Effort / Unit**

**Roles / resource**

**workload**
Critical Path Method (CPM)

The longest irreducible sequence of events

- Forward slash
- Backward slash
- Slack + Critical Path
Planning your Event: The Rollback Planning

Day 1

Deadline 1

Activity 1
5 weeks

Deadline 2

Activity 2
9 weeks

Deadline 3

Activity 3
16 weeks

Deadline 4

Activity 4
5 weeks

Deadline 5

Activity 5
5 weeks

Deadline 6

Activity 6
4 weeks

Deadline 7

Deadline 8

Deadline 9

Deadline 10

Day 19 37 55 73 91 109 127 145 163 181 199
Project Time Management Lifecycles Models
Project Management:
- Traditional frameworks
- Agile frameworks

Waterfall vs agile
Waterfall model
Agile: Iterative & Incremental value delivery

Project initiation

Iteration 1  Iteration 2  Iteration 3  Iteration 4  Iteration 5  Closeout

New product:

Customer acceptance
Project Management Framework
Knowledge areas impacted by Agile

- Time Management
- Cost Management
- Scope Management
- Quality Management
- Stakeholder Management
- HR Management
- Risk Management
- Communication Management
- Procurement Management
- Integration Management
**Waterfall vs Agile Methodology**

<table>
<thead>
<tr>
<th>Fixed</th>
<th>Requirements</th>
<th>Resources</th>
<th>Time</th>
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</thead>
<tbody>
<tr>
<td>WATERFALL</td>
<td>The Plan creates cost/schedule estimates</td>
<td></td>
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</tr>
<tr>
<td>AGILE</td>
<td>Software release themes and features determine the time and cost estimates.</td>
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</table>

<table>
<thead>
<tr>
<th>Estimated</th>
<th>Resources</th>
<th>Time</th>
<th>Features</th>
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<tbody>
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</table>
## Traditional PM versus Agile Methods

<table>
<thead>
<tr>
<th>Traditional</th>
<th>Agile</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design up front</td>
<td>Continuous design</td>
</tr>
<tr>
<td>Fixed scope</td>
<td>Flexible</td>
</tr>
<tr>
<td>Deliverables</td>
<td>Features/requirements</td>
</tr>
<tr>
<td>Freeze design as early as possible</td>
<td>Freeze design as late as possible</td>
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<tr>
<td>Low uncertainty</td>
<td>High uncertainty</td>
</tr>
<tr>
<td>Avoid change</td>
<td>Embrace change</td>
</tr>
<tr>
<td>Low customer interaction</td>
<td>High customer interaction</td>
</tr>
<tr>
<td>Conventional project teams</td>
<td>Self-organized project teams</td>
</tr>
</tbody>
</table>
The Agile – Scrum Framework

Inputs from Executives, Team, Stakeholders, Customers, Users

Product Owner

The Team

Sprint Backlog

Product Planning Meeting

Team selects starting at top as much as it can commit to deliver by end of Sprint

Sprint Backlog

Sprint Master

1-4 Week Sprint

Burndown/up Charts

Daily Scrum Meeting

Every 24 Hours

Sprint Review

Finished Work

Sprint Retrospective

Sprint end date and team deliverable do not change
Project & Portfolio Management Tools
Project & Portfolio Management Tools

• Planning & Scheduling Tools
  • Tasks management & planning, Gantt chart scheduling.
    ➔ MS Project, Open Project, Team Gantt, Tom’s Planner, Gantt Pro

• Planning & Collaboration Tools
  • integrated project management tool with collaborative capabilities
    ➔ Smartsheet, Wrike, Asana, Trello

• Agile Tools
  • Scalable software to accelerate delivery
    ➔ Jira, CA Agile Central, Version One

• Integrated Project & Portfolio Management Tools
  • Project prioritization in Portfolio, execution and monitoring of projects, enterprise resource optimization for projects, budget & cost follow up.
    ➔ CA PPM, MS Enterprise

Comparison of project management tools:
http://en.wikipedia.org/wiki/List_of_project_management_software
Planning Tools: Gantt Chart visualization
Tom’s Planner & Gant Pro

http://www.tomsplanner.com

- Truly easy to use Gantt Charts
- Templates that enable you to start planning straight away and help you get things done

http://www.ganttpro.com

- Online Gantt chart software for project management
- Plan and manage your projects easily with Gantt charts
Planning & Collaboration Tools
Agile Tools
The Technical and Sociocultural Dimensions of the Project Management Process
At the end, what do you need to manage your project?

Although project management is common sense, common sense isn’t always very common.
"If Things Seem Under Control, You're Not Going Fast Enough"

Mario Andretti
Thank you for participating!

• Please be sure to complete the session survey, which may be found on the event app.

• Your feedback is important to us as we begin planning for future educational opportunities for association professionals.