Project Management Essentials
Our Approach to the Workshop

<table>
<thead>
<tr>
<th>Discussion</th>
<th>Leading Practices</th>
<th>Tools &amp; Usage</th>
<th>Case Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>We will introduce the module topic with an initial discussion on the topic’s relevance</td>
<td>We will discuss leading practices in Project Management and identify elements that will help us succeed in the field</td>
<td>A deep dive into tools show you the relevance and application method for each tool</td>
<td>You will team up and apply leading practices and tools to a case study example</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Knowledge Check</th>
<th>Summary &amp; Reflection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Each module begins with objectives to ensure you understand what we will learn</td>
<td>Knowledge checks after each leading practice section help you retain foundational information</td>
<td>A concise summary helps you solidify key takeaways from the module and reflection provides an opportunity to discuss how you will apply PM skills</td>
</tr>
</tbody>
</table>
## Course Agenda – Day 1

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Module 1: Project Design**  | • Project Design Overview  
                             • Project Planning Matrix  
                             • Logic Structure  
                             • Work Breakdown Structure (WBS) |
| **Module 2: Project Planning**| • Project Planning Overview  
                             • Activity Planning  
                             • Network Analysis |
| **Module 3: Resource Planning & Budgeting** | • Resource Planning & Budgeting Overview  
                             • Cost Management  
                             • Budgeting |
# Course Agenda – Day 2

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
</table>
| Module 4: Risk Management                  | • Risk Management Overview  
• Risk Management Lifecycle          |
| Module 5: Stakeholder Management           | • Stakeholder Management Overview  
• Stakeholder Analysis             |
| Module 6: Implementation Management        | • Implementation Management Overview  
• Implementation Tracking  
• Monitoring Implementation Activities  
• Closing-Out Implementation Activities |
| Wrap-up & Evaluation                       | • Training Recap  
• Final Remarks                  |
Module 1: Project Design
Project Design

The Project Design Module includes both the Logic Model and Work Breakdown Structure

Each unit incorporates a holistic learning approach with the following key components:
After This Unit, You Can:

• Understand the key steps in Project Design
• Identify the components of a Logic Model and their relationship
• Put the Logic Model in the context of Project Management
• Define a Work Breakdown Structure (WBS) and list the steps to create one
• Explain why the WBS is the foundation of a project
• Use the Logic Model and WBS Templates in a real-life situation
# The Project Planning Matrix

The PPM is the Overview of the Project

<table>
<thead>
<tr>
<th>Hierarchy of Objectives</th>
<th>Indicators</th>
<th>Means of Verification</th>
<th>External Factors (Assumptions, Risk)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development Objective</td>
<td>Impact Indicators</td>
<td>Source of Information</td>
<td></td>
</tr>
<tr>
<td>Project Development Objective</td>
<td>Outcome Indicators</td>
<td>Source of Information</td>
<td>Assumptions, Risks</td>
</tr>
<tr>
<td>Outputs</td>
<td>Output Indicators</td>
<td>Source of Information</td>
<td>Assumptions, Risks</td>
</tr>
<tr>
<td>Activities</td>
<td>Resources Inputs</td>
<td></td>
<td>Assumptions, Risks</td>
</tr>
</tbody>
</table>
The Logic Model – The Intervention Logic

The five core components of the Logic Model include Inputs, Activities, Output, Outcome, and Impact.

Opportunity to Increase Efficiency

5. Inputs
Resources associated with the project (i.e. what will it cost to deliver the project?)

4. Activities
Actions taken to produce results

3. Output
The delivered services that result from a series of activities

Opportunity to Increase Effectiveness

2. Outcome
The objective the project is designed to contribute to

1. Impact
The effect of the project on the broader environment

Performance Indicators
The WBS template should be used to capture 100% of the work defined by the project scope, and to capture all deliverables.
**The Work Breakdown Structure (WBS)**

Work Breakdown Structure (WBS) is a hierarchical breakdown of elements of the logic model. The WBS serves to organize and define the total scope of the project.

**Decomposition:** The subdivision of project deliverables into smaller, more manageable components until the work and deliverables are defined to the Activity, Sub-Activity or Task Level.

**Tip:** Create a WBS for the project before completing a Concept Note. The WBS will assist with determining the content for the Concept Note.
The WBS is the Foundation of the Project

WBS is the link to project design and the first project planning activity

1. What do I need to do? (WBS)

2. What do I do first? How long will it take?

3. What resources will be needed?

- Refine Scope
- Define Activities
- Scheduling
- Network Diagram
- Budgeting
- Resources
The Activity Planning Template helps align the logic model elements with the WBS

<table>
<thead>
<tr>
<th>IMPACT</th>
<th>Link to OCs</th>
<th>Outcome #</th>
<th>OUTCOME (OC)</th>
<th>Link to OPs</th>
<th>Output #</th>
<th>OUTPUT (OP)</th>
<th>ACTY #</th>
<th>ACTIVITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>20% private sector savings</td>
<td>OC1; OC2</td>
<td>OC1</td>
<td>Reduction of time to obtain new license</td>
<td>OP1; OP2</td>
<td>OP1</td>
<td>Licensing Reform</td>
<td>1</td>
<td>As-is process mapping and analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2 Process re-engineering</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUB-ACTY #</th>
<th>SUB-ACTIVITY</th>
<th>PREDEC E-SSORS</th>
<th>Resource Responsible</th>
<th>Start</th>
<th>End</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1</td>
<td>Review and analyze previous reform efforts, past efforts</td>
<td>None</td>
<td>Name</td>
<td>4/21/11</td>
<td>4/26/11</td>
</tr>
<tr>
<td>1.2</td>
<td>Mapping and diagnostics of the 6 trade and 4 non-trade</td>
<td>None</td>
<td>Name</td>
<td>4/22/11</td>
<td>4/27/11</td>
</tr>
<tr>
<td>1.3</td>
<td>Design survey re: experiences with licensing</td>
<td>1.2</td>
<td>Name</td>
<td>4/23/11</td>
<td>4/28/11</td>
</tr>
<tr>
<td>1.4</td>
<td>Conduct survey</td>
<td>1.3</td>
<td>Name</td>
<td>4/24/11</td>
<td>4/29/11</td>
</tr>
<tr>
<td>1.5</td>
<td>As-is process mapping analysis completed</td>
<td>1.4</td>
<td>Name</td>
<td>4/25/11</td>
<td>4/30/11</td>
</tr>
<tr>
<td>2.1</td>
<td>Identify best practices relevant to Afghan context</td>
<td>1.2</td>
<td>Name</td>
<td>4/26/11</td>
<td>5/1/11</td>
</tr>
<tr>
<td>2.2</td>
<td>Study as-is analysis, suggest reform proposals, set</td>
<td>1.2</td>
<td>Name</td>
<td>4/27/11</td>
<td>5/2/11</td>
</tr>
<tr>
<td>2.3</td>
<td>Obtain endorsement of new process by Minister of</td>
<td>2.2</td>
<td>Name</td>
<td>4/28/11</td>
<td>5/3/11</td>
</tr>
<tr>
<td>2.4</td>
<td>Process re-engineering complete</td>
<td>2.3</td>
<td>Name</td>
<td>4/29/11</td>
<td>5/4/11</td>
</tr>
</tbody>
</table>
Module 2: Project Planning
Project Planning Learning Objectives

After This Unit, You Can:

• Systematically identify relevant activities to achieve required outputs
• Define network analysis and its uses in project planning
• Perform a forward pass, a backward pass, and calculate a float
• Identify the critical path in your project plan
Activity Scheduling

Defining what goes first and how long activities take is the second step.

1. What do I need to do? WBS

2. What do I do first? How long will it take?

3. What resources will be needed?

- Refine Scope
- Define Activities
- Scheduling
- Network Diagram
- Budgeting
- Resources
### Activity Planning Steps

Activity Planning typically includes three steps that allow the project schedule to be created:

<table>
<thead>
<tr>
<th>Planning Step</th>
<th>Description</th>
<th>Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Activity Definition</td>
<td>Identify activities that will generate project results</td>
<td>Project Schedule</td>
</tr>
<tr>
<td>2. Activity Sequencing</td>
<td>Identify the order of activities, considering their relationship</td>
<td></td>
</tr>
<tr>
<td>3. Activity Duration Estimating</td>
<td>Estimate the time needed to complete activities</td>
<td></td>
</tr>
</tbody>
</table>

Proper activity planning provides the framework for developing an integrated project approach and implementation plan, ultimately allowing for the creation of the project’s Design Document.
Defining Activities

Outputs should be decomposed into activities that allow the project to achieve the desired impact. These activities are typically:

Each activity outlined within the WBS must be complete and accurate, as it will be leveraged to develop the project schedule.
The Network Diagram Template may be created to schematically show the sequencing of projects.

A completed network diagram can be used to identify the critical path of a project, which is the series of dependent activities that determines the shortest possible duration of a project.
Activity Duration Estimating

Consider these elements in estimating the number of work periods that will be needed for each activity:

- Potential and available resources and capabilities
- Constraints
- Delays and lag-times
- Risks and build-in reserve/contingency time
- Input from subject matter experts and historical information
- Assumptions
- Start and end dates for project activities
Microsoft Project is available for you to use as a Project Management tool

Microsoft Project

- Requires buying a license
- Industry standard; widely accepted and used in the corporate environment
- Extensive help resources online and offline
- Does not require Java
- Excellent scheduling, resource planning, and cost tracking tool
Module 3: Resource Planning & Budgeting
Resource Planning & Budgeting Learning Objectives

After This Unit, You Can:

• Understand key restrictions to project management
• List steps involved in estimating resource requirements
• Understand elements that drive costs on a project
• Complete a resource estimation worksheet
Estimating Resources

The third step, estimating resources, is critical for project success.

1. What do I need to do? WBS

2. What do I do first? How long will it take?

3. What resources will be needed?

Budgeting

Resources

Refine Scope

Define Activities

Scheduling

Network Diagram
Cost Management Processes

In a competitive budgetary environment, formal cost management is a crucial project management skill.

Three interactive processes are required to manage costs effectively:

1. Estimate Costs (Planning)
2. Determine Budget (Planning)
3. Control Costs (Monitoring & Controlling)
Costs, Budgets, and Monitoring

By spending the appropriate time estimating costs, determining the budget, and controlling costs, the project can achieve its objectives.

<table>
<thead>
<tr>
<th>Estimate Costs (Planning)</th>
<th>Determine Budget (Planning)</th>
<th>Control Costs (Monitoring &amp; Controlling)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inputs:</strong></td>
<td><strong>Inputs:</strong></td>
<td><strong>Inputs:</strong></td>
</tr>
<tr>
<td>• Scope</td>
<td>• Activity Cost Estimates</td>
<td>• Project Management Plan</td>
</tr>
<tr>
<td>• Project Schedule</td>
<td>• Basis of Estimates</td>
<td>• Project Funding Requirements</td>
</tr>
<tr>
<td>• Risk Analysis</td>
<td>• Resource Calendars</td>
<td>• Staff and Consultant Updates</td>
</tr>
<tr>
<td>• Assumptions</td>
<td>• Contracts</td>
<td></td>
</tr>
<tr>
<td>• Type/Availability of Resources</td>
<td>• Consulting Resources</td>
<td></td>
</tr>
<tr>
<td><strong>Tools &amp; Technique:</strong></td>
<td><strong>Tools &amp; Techniques:</strong></td>
<td><strong>Tools &amp; Techniques:</strong></td>
</tr>
<tr>
<td>• Design to Budget</td>
<td>• Cost Aggregation</td>
<td>• Forecasting</td>
</tr>
<tr>
<td>• Top-down Estimating</td>
<td>• Expert Judgment</td>
<td>• Performance Reviews</td>
</tr>
<tr>
<td>• Bottom-up Estimating</td>
<td>• Budget Revision</td>
<td>• Project Management Software</td>
</tr>
<tr>
<td><strong>Output:</strong></td>
<td><strong>Outputs:</strong></td>
<td><strong>Outputs:</strong></td>
</tr>
<tr>
<td>• Activity Cost Estimates</td>
<td>• Cost Performance Baseline</td>
<td>• Budget Forecasts</td>
</tr>
<tr>
<td>• Basis of Estimates</td>
<td>• Project Funding Requirements</td>
<td>• Change Requests</td>
</tr>
<tr>
<td>• Project Document Updates</td>
<td>• Project Document Updates</td>
<td>• Project Management Plan Updates</td>
</tr>
</tbody>
</table>
Estimating by Type of Resource

People and travel drive the majority of the project expenses

Estimate Activity Resources:
Estimate the type and quantities of people, travel and other project costs required for each activity

- **People**: Both staff and consultants need to be reflected
- **Travel**: Transportation and all other travel-related expenses
- **Other Costs**: Materials, leases, and all other services or overhead
Types of Costs

Consider the impact of various types of costs on expense over time

<table>
<thead>
<tr>
<th>Direct Costs</th>
<th>Versus</th>
<th>Indirect Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Costs directly attributable to project work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Examples: team travel; salaries; cost of materials</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Overhead items or costs that benefit more than one project</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Examples: office support staff; use of office space</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fixed Costs</th>
<th>Versus</th>
<th>Variable Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Costs that do not change as production changes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Examples: leases; other pre-arranged contracts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Costs that change with the scope and time spent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Examples: staff salary; consultant fees</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Incorporating Costs within WBS

When planning your activities, consider how the various activities and WBS outputs will effect costs and overall budget.

Consider the costs associated with each work stream’s activities.

Consider the costs associated with the inputs related to each work stream.
Budgeting Techniques

Various budgeting techniques can be used depending on the project.

**Design-to-Budget:**
Used when the project budget is fixed. Costs are estimated by working backwards from the total budget through prioritizing and assessing requirements until the project can be completed within available budget.

**Top-down Estimating:**
This approach typically relies on cost histories from past projects, and knowledge of the specific parameters of those projects.

**Bottom-up estimating:**
Requires a cost estimate to be developed for each of the work packages in the WBS. Then, once the cost of each work package is estimated, the estimates can be added together to compile the total project cost estimate.

While top-down estimation is a quick way to establish a baseline for the project, it is rarely sufficient for estimating project costs and should always be accompanied with a bottom-up estimation technique.
Considerations for Resource Planning & Budgeting

Assumptions, risks, and external environment play a role in resource planning and budgeting, potentially impacting total costs

- **Risks**
  - Decrease of supply inputs
  - Presence of competitors in similar market

- **External Environment**
  - Political tensions
  - Economic climate
  - Environmental regulations

- **Assumptions**
  - Time required
  - Resource availability

Resource Planning and Budgeting
Project Management Essentials
Day 2
# Course Agenda – Day 2

<table>
<thead>
<tr>
<th>Topic</th>
<th>Description</th>
</tr>
</thead>
</table>
| Module 4: Risk Management                  | • Risk Management Overview  
                                          | • Risk Management Lifecycle                                                  |
| Module 5: Stakeholder Management           | • Stakeholder Management Overview                                           |
                                          | • Stakeholder Analysis                                                      |
| Module 6: Implementation Management        | • Implementation Management Overview                                       |
                                          | • Implementation Tracking                                                   |
                                          | • Monitoring Implementation Activities                                      |
                                          | • Closing-Out Implementation Activities                                    |
| Wrap-up & Evaluation                       | • Training Recap                                                            |
                                          | • Final Remarks                                                             |
Module 4: Risk Management
Risk Management Learning Objectives

After This Unit, You Can:

- Define risk, opportunity, and risk management
- Understand the importance of risk management
- List and define 5 general kinds of risk
- Explain the 4 steps in the risk management process
- Develop a plan to mitigate risks using a risk log
- Continually monitor and update risks over a project life cycle
Introduction to Risk Management

Risk is the probability of a condition or event with a negative impact on achieving a business objectives

Risk Management is the process of identifying, assessing and managing risks so as to avoid, mitigate, or control them
Identifying Potential Risks

**Strategic:** The potential risk of a failure to achieve WB’s strategic mission

- **Operational**
  The financial and reputational impact resulting from inadequate or failed internal processes, people, and systems, or from external events

- **Financial**
  The risk that financial contributions from donors and clients are inadequate to fund the work in line with the Board approved strategy

- **Stakeholder**
  Negative perception on the part of stakeholders including clients, donors, affected communities, civil society organizations, or other relevant parties

- **Social and Environmental**
  S&E environmental assessment and management systems; labor & working conditions; pollution prevention & abatement; community health & safety; indigenous people
The Risk Management Lifecycle

Risk Management is a dynamic process, beginning at the planning phase of a project, and continuing throughout the project life cycle.

Risk Management is divided in four phases:

1. Risk Identification
   - Identifying, logging and classifying risks.

2. Risk Assessment
   - Assessing probabilities and impact to prioritize risks.

3. Risk Mitigation
   - Determining response to risks.

4. Risk Monitoring and Control
   - Continuous monitoring and updating.

WORLD BANK GROUP
Phase 1: Risk Identification

The first step consists in identifying, logging, and classifying the risks.

<table>
<thead>
<tr>
<th>Identification Guidelines</th>
<th>Documentation Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Brainstorm a comprehensive list – do not try to analyze or solve at this point</td>
<td>1. State the risk and the area of impact and be as specific as possible</td>
</tr>
<tr>
<td>2. Use PM documents for identification (WBS, work plan, stakeholder analysis)</td>
<td>2. Use complete sentences and do not include questions or action items</td>
</tr>
<tr>
<td>3. Work with your team (they will be doing the work; with project and regional leadership, they have the experience) to identify risks</td>
<td>3. Document risks based on categories consistent with your work</td>
</tr>
</tbody>
</table>

Common Risks to Achieve Program Objectives

- Low Capacity of Client Implementation Teams
- Low Commitment of Key Client Groups
- Competition for Qualified Individuals
- Inability to Maintain Momentum
- Failure to Scale Pilot Projects
Phase 2: Risk Assessment

The second step consists of assessing risk probability and impact in order to prioritize risks

**Assessment Guidelines**

1. Assess probability of risk occurring
2. Assess impact of risk occurring
3. Determine appropriate risk quadrant
4. Assess stakeholders involved (bubble size)
5. Determine risk priority

**Mapping**

- The size of the bubble indicates the level of influence of resources involved
- The location indicates the level of influence and impact
- The color indicates group category
Phase 3: Risk Mitigation

The third step is determining a response to risks

<table>
<thead>
<tr>
<th>Avoid</th>
<th>Eliminate the threat by eliminating the cause</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mitigate</td>
<td>Reduce the probability or impact of the risk</td>
</tr>
<tr>
<td>Accept &amp; Budget</td>
<td>Accept the risk and budget for contingencies</td>
</tr>
<tr>
<td>Transfer</td>
<td>Seek outside responsibility for risk management (outsource)</td>
</tr>
</tbody>
</table>
Phase 4: Risk Monitoring & Control

The final step, monitoring and controlling risk, requires ongoing discipline of execution.

<table>
<thead>
<tr>
<th>Risk Monitoring &amp; Control</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Execute</td>
</tr>
<tr>
<td>2. Evaluate</td>
</tr>
<tr>
<td>3. Document</td>
</tr>
</tbody>
</table>
Risk Management Log

A Risk Management Log encapsulates the risk management process throughout the project lifecycle and should be constantly updated.

<table>
<thead>
<tr>
<th>Identification</th>
<th></th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Risk #</strong></td>
<td><strong>Description</strong></td>
<td><strong>Created By</strong></td>
</tr>
<tr>
<td>SAMPLE</td>
<td>Finding resources of the right skill set might be difficult</td>
<td>Project Team Lead</td>
</tr>
<tr>
<td>SAMPLE</td>
<td>11/7/09</td>
<td>2</td>
</tr>
<tr>
<td>SAMPLE</td>
<td>10/30/09</td>
<td>Financial</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mitigation</th>
<th>Control</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Risk Response</strong></td>
<td><strong>Action to be Taken</strong></td>
</tr>
<tr>
<td>Mitigate</td>
<td>Establish relationship with professional Associations and universities to access pool of potential candidates.</td>
</tr>
<tr>
<td>Avoid</td>
<td>Low = 0-5</td>
</tr>
</tbody>
</table>
Module 5: Stakeholder Management
Stakeholder Management Learning Objectives

After This Unit, You Can:

• Define stakeholder and stakeholder engagement/management
• List and explain the steps for conducting a stakeholder analysis
• Define the strategies to manage stakeholders in your project
• List and explain the steps involved in creating a communication plan
Overview of Key Terms

Stakeholders are individuals, groups, and organizations that will impact or be impacted by the implementation of the project.

**Stakeholder Management** is a structured approach to identifying and handling all aspects of stakeholder involvement and participation in the project.

**Stakeholder Engagement** is a continuous process of actively developing and building relationships with stakeholders throughout the life of the project.

**Common Stakeholders:**
- Project sponsor(s) or donor(s)
- Local consultants / academic institutions
- Clients, beneficiaries, and NGOs
- CMU, GP, and CCSA
- WBG colleagues
- Other (e.g. media outlets)
Stakeholder Analysis

Stakeholder analysis is the process of identifying and assessing the potential impact of stakeholders on the project

**Key Activities**

- Determine who is important to the project’s success
- Identify the stakeholder’s potential effect on the project
- Identify potential risks or project roadblocks
- Determine how to best involve stakeholders

**Key Outcomes**

- Develop enhanced relationships
- Define clear assumptions & potential risks
- Manage expectations of engagement
Step 1: Identify Potential Stakeholders

The first step is to determine all people, groups, and institutions that will affect, or be affected, by the project.

One approach is to think in terms of categories and then list your key stakeholders.

**WB**
- CMU, GP, and CCSA
- WBG Science of Delivery Team
- Global / Regional / Engagement Leads
- Facilitators, Coaches, and Change Specialists

**Clients**
- Ministry of Finance
- Ministry of Infrastructure
- MD of Partner Bank

**Donors & Partners**
- Local Consultants
- Academic Institutions

**Beneficiaries & Other**
- Civil Society
- Community Groups
- Press
- Private Sector Organisations
Step 2: Assess Stakeholder Connection to a Project

Each stakeholder will be able to impact a project and, therefore, it is important to identify and manage their level of influence.

<table>
<thead>
<tr>
<th>Relationship</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Interest</strong></td>
<td>Stakeholder has a stake in the project and the degree to which the project impacts the particular stakeholder</td>
</tr>
<tr>
<td><strong>Influence</strong></td>
<td>Extent of involvement in the project and ability to make decisions that will impact the project</td>
</tr>
<tr>
<td><strong>Support</strong></td>
<td>Stakeholder’s attitude towards the project, whether they are likely to view the project positively or negatively</td>
</tr>
</tbody>
</table>
Step 3: Determine Stakeholder Engagement Strategy

The strategy for stakeholder management is defined based on influence and interest.

- **Involve as needed**: Design ways to engage individuals who support the project and address the concerns of those who do not.
- **Keep Informed**: These individuals need only to be kept abreast of program or respond to inquiries as appropriate.
- **Enlist Help, Support, and Lead**: These individuals should be our champions and leaders in communicating key messages; if they are not we should spend significant effort to align them.
- **Address Concerns and Engage**: This group is the one impacted most and should be communicated consistently to address their concerns.
### External Stakeholder Analysis

**Assessed through interview:** level of influence, projected impact on role, degree of program involvement, current engagement stage

**Assessed through Target Engagement Framework:** target engagement stage

<table>
<thead>
<tr>
<th>Client</th>
<th>Name</th>
<th>Meeting Date</th>
<th>Position</th>
<th>Level of Influence</th>
<th>Projected Impact on Role</th>
<th>Degree of Program Involvement</th>
<th>Engagement Stage (as of April 2015)</th>
<th>Current Engagement Stage (as of...)</th>
<th>Target Engagement Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example Client</td>
<td>Doe, Jane</td>
<td>4/2/2015</td>
<td>Executive Director</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Unaware</td>
<td>Partnership</td>
<td></td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, John</td>
<td>4/3/2015</td>
<td>Chief Management Officer</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Unaware</td>
<td>Partnership</td>
<td></td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, Jane</td>
<td>4/4/2015</td>
<td>HR Director</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Unaware</td>
<td>Partnership</td>
<td></td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, John</td>
<td>4/5/2015</td>
<td>Program Analyst</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Unaware</td>
<td>Partnership</td>
<td></td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, Jane</td>
<td>4/6/2015</td>
<td>Administrative Assistant</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Unaware</td>
<td>Partnership</td>
<td></td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, John</td>
<td>4/7/2015</td>
<td>Executive Director</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Unaware</td>
<td>Partnership</td>
<td></td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, Jane</td>
<td>4/8/2015</td>
<td>Chief Management Officer</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Partnership</td>
<td>Partnership</td>
<td>Partnership</td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, Jo</td>
<td>4/9/2015</td>
<td>HR Director</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Partnership</td>
<td>Partnership</td>
<td>Partnership</td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, Jane</td>
<td>4/10/2015</td>
<td>Program Analyst</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Partnership</td>
<td>Sponsorship</td>
<td>Sponsorship</td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, Jane</td>
<td>4/11/2015</td>
<td>Administrative Assistant</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Partnership</td>
<td>Partnership</td>
<td>Partnership</td>
</tr>
<tr>
<td>Example Client</td>
<td>Doe, John</td>
<td>4/12/2015</td>
<td>Executive Director</td>
<td>3-Medium</td>
<td>2-Moderate</td>
<td>2-Moderate</td>
<td>Partnership</td>
<td>Partnership</td>
<td>Partnership</td>
</tr>
</tbody>
</table>

**Risk and Issue Overview**

**Purpose:** Risks and issues are analyzed in order to establish a point-in-time view of stakeholder concerns. These risks and issues were used to identify key risks and issues by organization

<table>
<thead>
<tr>
<th>Name</th>
<th>Risk/Issue</th>
<th>Risk/Issue Description</th>
<th>Date Identified</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doe, Jane</td>
<td>Risk</td>
<td>Description of risk</td>
<td>11/21/2014</td>
<td>Medium</td>
</tr>
<tr>
<td>Doe, John</td>
<td>Risk</td>
<td>Description of risk</td>
<td>11/21/2014</td>
<td>Medium</td>
</tr>
<tr>
<td>Doe, Jane</td>
<td>Issue</td>
<td>Description of issue</td>
<td>11/21/2014</td>
<td>High</td>
</tr>
<tr>
<td>Doe, John</td>
<td>Risk</td>
<td>Description of risk</td>
<td>11/13/2014</td>
<td>High</td>
</tr>
<tr>
<td>Doe, Jane</td>
<td>Risk</td>
<td>Description of risk</td>
<td>11/13/2014</td>
<td>Medium</td>
</tr>
<tr>
<td>Doe, John</td>
<td>Risk</td>
<td>Description of risk</td>
<td>11/12/2014</td>
<td>High</td>
</tr>
</tbody>
</table>
Module 5: Implementation Management
Implementation Management

The Implementation Management Model consists of 2 units:

The first unit covers how to manage and track the implementation.
After This Unit, You Can:

• List the project management components that need to be monitored and tracked, and explain how to monitor and track each

• Understand the impact tracking and monitoring can have on other PM phases

• Use a Project Status Report in a real-life situation

• Understand why the work done during closure is important to a high-performing organization

• Identify the role of Lessons Learned as inputs and outputs
The Project Manager’s Role in Implementation

During implementation, project managers are responsible for the ongoing monitoring and tracking of project components.

**Track:** A fact-finding process that records planned vs. actual

**Monitor:** Process of analyzing outputs of tracking

**Implementation:** Point where all of the pieces of a project are integrated.
Implementation Tracking

Tracking and monitoring is an important step in implementation tracking and allows teams to do the following:

• Identify issues in advance situations where corrective action is required
• Stop issues from turning into bigger project risks
• Predict what may happen in the future if present conditions continue (forecasting)
• Gather information necessary for recording development effectiveness

### Critical Tracking and Monitoring Components

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scope</td>
<td>Current activities, planned activities and any additions or changes to the planned activities</td>
</tr>
<tr>
<td>Activity &amp; Schedule</td>
<td>Comparing the planned schedule to the actual progress to determine current position</td>
</tr>
<tr>
<td>Resources</td>
<td>Tracking the time resources are spending on the project for the purposes of tracking the budget</td>
</tr>
</tbody>
</table>
Component #1: Scope

The project scope is the total amount of work that needs to be completed to accomplish the project’s objectives

### Scope Control
- Tracking and monitoring the scope to ensure that any changes incorporate only what is critical to achieving the project goals
- Collecting frequent status reports from consultants to monitor scope

### Scope Creep
- Any changes to the planned activities and approach to executing the project
- Review if the scope creep is critical to project’s success
- Review the impact of project scope changes on timelines, resources, cost, and risks
Component #2: Activity & Schedule

In order to track activity and schedule progress, performance should be reported against the baseline created during the planning phase.

Steps for Developing Baseline Schedule:
1. Review planned activities
2. Determine what work has been done to complete activities
3. Analyze planned versus actual work
4. Compare to planned start and finish dates and determine any adjustments
5. Analyze dependencies and impact on other tasks and make necessary adjustments to target dates

<table>
<thead>
<tr>
<th>#</th>
<th>Activity</th>
<th>Dependency</th>
<th>Planned</th>
<th>Actual</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Start</td>
<td>Finish</td>
<td>Duration</td>
</tr>
<tr>
<td>1a</td>
<td>Gather data and content</td>
<td>None</td>
<td>1/15</td>
<td>1/16</td>
<td>2 days</td>
</tr>
<tr>
<td>1b</td>
<td>Develop draft</td>
<td>(1a, FS)</td>
<td>1/18</td>
<td>1/24</td>
<td>7 days</td>
</tr>
<tr>
<td>1c</td>
<td>Draft review</td>
<td>(1b, FS)</td>
<td>1/25</td>
<td>1/26</td>
<td>2 days</td>
</tr>
<tr>
<td>1d</td>
<td>Incorporate edits and finalize</td>
<td>(1c, FS)</td>
<td>1/27</td>
<td>1/29</td>
<td>3 days</td>
</tr>
</tbody>
</table>
Component #3: Resources

Monitoring the budget involves tracking the project’s costs and work performed in order to manage changes to the cost baseline.

Limitations of Traditional Planned vs. Actual Results

| Monitor Planned vs. Actual Costs | • Project may be progressing on budget but behind/ahead of schedule |
| Monitor Planned vs. Actual Work Performed | • Project may be progressing on schedule but over/under budget |
Monitoring Implementation: Status Reports

Status reports help keep staff on track, keep others informed of progress and enable input collection when needed.

**Status Report Benefits**

1. **Focus** more on the task at hand
2. **Clarity** surrounding timing and budget constraints
3. **Record** key decisions, progress, and future tasks
4. Paint **The Bigger Picture** for internal teams to visualize overall progress

---

**Project Status Summary**

<table>
<thead>
<tr>
<th>Overall Project Status</th>
<th>Scope</th>
<th>Resources</th>
<th>Schedule</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Y</td>
<td>R</td>
<td>G</td>
<td>Y</td>
</tr>
</tbody>
</table>

**Project Trends Key**

- **Trending Up** (Improving)
- **Flat Trend** (Steady)
- **Trending Down** (Declining)

**Items Needing Leadership Attention**

<table>
<thead>
<tr>
<th>Requirement ID</th>
<th>Description</th>
<th>Priority/Severity</th>
<th>Target Resolution Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk XX</td>
<td>Risk description…</td>
<td>Critical</td>
<td>17-May-2013</td>
</tr>
<tr>
<td>Issue XX</td>
<td>Issue description…</td>
<td>Critical</td>
<td>01-Jun-2013</td>
</tr>
<tr>
<td>Decision XX</td>
<td>Decision description…</td>
<td>High</td>
<td>17-Jun-2013</td>
</tr>
</tbody>
</table>

---

**Upcoming Deliverable and Key Milestone Status**

<table>
<thead>
<tr>
<th>Deliverable / Milestone Name</th>
<th>Progress</th>
<th>Baseline Finish Date</th>
<th>Planned/Actual Finish Date</th>
<th>Status</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable 1</td>
<td></td>
<td>18-May-2013</td>
<td>18-May-2013</td>
<td>G</td>
<td></td>
</tr>
<tr>
<td>Deliverable 2</td>
<td></td>
<td>21-May-2013</td>
<td>21-May-2013</td>
<td>G</td>
<td></td>
</tr>
<tr>
<td>Deliverable 3</td>
<td></td>
<td>23-May-2013</td>
<td>25-May-2013</td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Milestone 1</td>
<td></td>
<td>28-May-2013</td>
<td>4-Jun-2013</td>
<td>R</td>
<td></td>
</tr>
<tr>
<td>Deliverable 4</td>
<td></td>
<td>1-Jun-2013</td>
<td>6-Jun-2013</td>
<td>NS</td>
<td></td>
</tr>
</tbody>
</table>

**Deliverable Status and Milestone Summary Legend**

- NS: Not started
- C: Completed
- G: On track
- Y: <1 week behind schedule
- R: >1 week behind schedule
Implementation Management

The Implementation Management Model consists of 2 units:

The second unit covers the basics of Closing:
Exit Criteria

To determine an appropriate exit point throughout the project, you may regularly ask the following questions during project milestones:

- Have clients adopted the approach, successfully demonstrated results, and carry the capacity to proceed independently?
- Are clients satisfied with the results, but unable or unwilling to proceed independently?
- Have clients tried the approach, but failed to deliver consistent results?
- Is there a lack of traction on the implemented solutions or desired plan?
Wrap-Up and Evaluation
# Project Management Training Overview

<table>
<thead>
<tr>
<th>Module 1</th>
<th>Module 2</th>
<th>Module 3</th>
<th>Module 4</th>
<th>Module 5</th>
<th>Module 6</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Design</strong></td>
<td><strong>Project Planning</strong></td>
<td><strong>Resource Management &amp; Budgeting</strong></td>
<td><strong>Risk Management</strong></td>
<td><strong>Stakeholder Management</strong></td>
<td><strong>Implementation</strong></td>
</tr>
<tr>
<td>In this unit we learned project design, logic model and WBS to create well-structured projects.</td>
<td>In the Planning unit we learned how to use activity planning and network analysis for better planning.</td>
<td>In the resource management and budgeting module we learned to estimate resources by type and manage costs effectively.</td>
<td>In this unit, we learned to identify, manage and continuously monitor risks.</td>
<td>In this unit we learned to identify, manage and communicate with stakeholders.</td>
<td>In this unit you learned to monitor and track project components, and capture lessons learned.</td>
</tr>
</tbody>
</table>

---

**Risk Management**

In this unit, we learned to identify, manage and continuously monitor risks.

**Stakeholder Management**

In this unit we learned to identify, manage and communicate with stakeholders.

**Implementation**

In this unit you learned to monitor and track project components, and capture lessons learned.
Closing Remarks

As you use Project Management methodologies within your own roles, consider the following:

1. Incorporate project management check-ups into the schedule

2. Don’t forget to review and update the risk log, stakeholder analysis, and resource estimation worksheet regularly and assess impact of any changes on scope, budget and timeline

3. Remember the interdependencies between components of the project – changes in one area means changes in all areas

4. Involve stakeholders in decisions and revisions, and escalate where necessary

5. Spend the time necessary up front laying the groundwork for a successful project
Project Management Toolkit

**Logic Model**
The logic model solidifies the overall project objectives to ensure any changes align with project goals and to clarify what indicators should be tracked.

**Schedule**
Milestones are logical times to check progress against schedule and budget.

**Risk Log**
Risk logs document what you did and didn’t anticipate and where and what corrective action may be required.

**Resource Estimation Worksheet**
The resource estimation worksheet documents key resource assumptions that will need to be adjusted as more information becomes available.

**Budget**
The budget displays key financial information and facilitates tracking.

**Stakeholder Analysis & Communications Plan**
The stakeholder communication plan tracks who should be informed or consulted at various junctures.
Thank You!

Please refer to the Course Evaluation Tab in your participant book.