

مقرر: تخطيط المشروع

الأجزاء المحذوفة
للإختبار النهائي

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Lecture 1

Preamble

• The Project Management Institute (PMI):

- The Project Management Institute (PMI) is a leader in understanding project management professionally and advancing the field of project management.
- PMI was founded in 1969.
- The PMI has a global footprint in nearly 200 countries around the world. From its global headquarters in Norcross Square outside of Philadelphia, the Project Management Institute provides certification for project management professionals, as well as career training and educational resources. The group also conducts research programs to advance scientific and practical abilities within the industry.



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Lecture 1

Preamble

• The Project Management Body of Knowledge (PMBOK):

PMBOK is an internationally recognized standard edited by the PMI that provides fundamental concepts of project management regardless of the type of the project, be it a construction project, a software development project, a heavy engineering project or a laboratory project.



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Lecture 1

II-Project Planning

1. **Project charter:** This is a formal document that describes the objectives and the stakeholders of a project.
2. **Project schedule:** This component defines the time frame for the project using various scheduling tools.
3. **Project resources:** This component defines the equipment and human capital required for a project.
4. **Project budget:** What will the project cost your company? Is it even financially viable to take up the project?



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Lecture 1

II-Project Planning

5. **Project quality:** What are the parameters to judge the success of your project? What are the key performance indicators?
6. **Project risk:** This is the element that project planning is basically done for.
7. **Project communications:** This component is the consistent reporting mechanism that keeps the stakeholders and the management on the same page.

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Lecture 2 A- Project Vision

Project Vision Statements Examples

WELA	McDonald's	Disneyland
"To become the world's most trusted company."	"To move with velocity to drive profitable growth and become an even better McDonald's serving more customers delicious food each day around the world."	"To be one of the world's leading producers and providers of entertainment and information."
GOOGLE	UNICEF	Nike
"To provide access to the world's information in one click."	"To create a world where the rights of every child are realized."	"We are a world where everybody is an athlete."

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Lecture 2 B- Project Mission

MISSION STATEMENT

WELA	McDonald's	Disneyland
"To be offering a wide range of well-designed, functional, home furnishings products at prices so low that as many people as possible will be able to afford them."	"To be our customers' favorite place and way to eat and drink."	"To entertain, inform and inspire people around the globe through the power of unparalleled storytelling, reflecting the iconic brands, creative minds and innovative technologies that make more the world's premiere entertainment company."
GOOGLE	UNICEF	Nike
"To organize the world's information and make it universally accessible and useful."	"Promotes the rights and wellbeing of every child, in everything we do."	"To bring inspiration and innovation to every athlete in the world. (If you have a body, you are an athlete.)"

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Lecture 2 C- Project Core Values

Project Core Values Examples

WELA	McDonald's	Disneyland
Customer focus, innovation, quality, integrity, respect, diversity, and environmental responsibility.	Teamwork, integrity, respect, diversity, and environmental responsibility.	Teamwork, integrity, respect, diversity, and environmental responsibility.
GOOGLE	UNICEF	Nike
Customer focus, innovation, quality, integrity, respect, diversity, and environmental responsibility.	Teamwork, integrity, respect, diversity, and environmental responsibility.	Teamwork, integrity, respect, diversity, and environmental responsibility.

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Lecture 2 D- Defining Project Goals

D-1-2- What are the benefits of SMART Goals?

- **Clear communication and alignment**
When your project team knows exactly what they're working towards, they're more motivated and aligned as a team.
- **Clarity towards project success**
Have you ever gotten to the end of a project and not really known if you hit your project goals or not? SMART Goals help you set clear goals, so you can avoid vague or confusing goal language.

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Lecture 2 D- Defining Project Goals

- **Clear roadmap & finish line**
With SMART goals, you know exactly what you want to achieve and which time frame you expect to achieve them by. You've verified that these goals are realistic and achievable. And you know you'll be able to measure them to see if you hit them or not.
- **Trackable metrics**
When you finish your project, SMART goals help you evaluate its success.

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Lecture 2 D- Defining Project Goals

D-1-3- SMART Goals setting template

- When you're ready to set your own SMART Goals, start by writing your project goal as a sentence or two.
- Then, apply each of the five SMART Goals attributes to your goal and make sure you cover all of your bases.
- When you're ready to get started, use this template:

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Lecture 2 D- Defining Project Goals

Initial goal: Write down whatever your initial goal is. Don't worry about it not being completely SMART—we'll get to that later in the template.

Key: I want to improve our company brand on social media.

Key, continued: Improve our company brand on social media.

Make it Specific: Does your goal define exactly what you want to do? If not, it's not specific to your particular project.

Make it Measurable: Have you established how you'll measure your goal once your project is complete? If not, add a way to measure success or failure at the end of your project.

Key, continued: Develop company-specific hashtags to generate 1,000 new Instagram followers.

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Lecture 2 D- Defining Project Goals

Make it Achievable: Is your goal something you can project team reasonably hit when all you achieve your actual goal? Make sure this is your target date or project goal date within your project timeline.

Make it Realistic: Can your goal? Even if it's a stretch goal? Make sure you clearly define in your SMART goal timeline in your SMART goal.

Make it Time-bound: By when will you achieve your actual goal? Make sure you clearly define in your SMART goal timeline in your SMART goal.

Example, continued: Develop and use company-specific hashtags in our industry to generate 1,000 new Instagram followers.

Example, continued: Post once daily on Instagram and answer every post we have a minimum of half of 1,000 new Instagram followers in our industry to generate 1,000 new Instagram followers.

Example, continued: Post every working day on Instagram for the first 30 days of the project to generate 1,000 new Instagram followers in our industry to generate 1,000 new Instagram followers.

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Lecture 2 D- Defining Project Goals

D-1-4- CLEAR Goals

- The 2nd popular goal-setting methodology is CLEAR Goals.
- The problem with SMART Goals is that they just haven't kept up with the faster, more agile environment that most businesses find themselves in today.
- Three new business environments require a new way of setting goals, that CLEAR Goals.

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Lecture 2 D- Defining Project Goals

CLEAR Goals for:

- **Collaborative** (Goals should encourage employees to work together collaboratively and in teams)
- **Involved** (Goals should be limited in both scope and duration)
- **Motivational** (Goals should make an emotional connection to employees, tapping into their energy and passion)
- **Aggregatable** (Large goals should be broken down into smaller goals so they can be accomplished more quickly and easily for long-term goals)
- **Measurable** (Set goals with a leading and lagging objective, but at new situations or information arise, give yourself permission to refer and modify your goals)

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Lecture 2 E- Project Objectives

E-1- Project Objectives vs. Business Objectives

- **Project Objectives** are just that—objectives and performance indicators for individual projects. Your project objectives should apply to the project. They're clear, and they should be specific enough to guide your team in making project success.
- **Business Objectives** are bigger than a single project. Unlike project objectives, your business objectives will fuel your business trajectory and velocity. Your business objectives should be long-term guidelines for your entire company or department. They will guide your company goals for a quarter or year, and they should be written in whatever goal-setting methodology your team uses, like Objectives and Key Results (OKRs).

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Lecture 2 E- Project Objectives

Without a Project Objectives, you don't have an easy way to know if your project succeeded or failed—or can you plan improvements for the next project you work on.

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Lecture 2 E- Project Objectives

A = Audience
Who will be affected (paying cost)?

B = Behavior
The observable change (knowledge, attitude, behavior, process) that will occur in the target group (function of your project).

C = Conditions
How the behavior will be observed or measured, including the instruments to be used.

D = Data
Levels of attainment that must be met in order for your project to be considered a success (your definition).

E = Effort
Identify when the effects of your program will be measured.

Measurable objectives are simple to write as A-B-C-D-E

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Lecture 3 I- The Importance of Planning Process

I-1- What is a Planning Process

- A Process is series of actions which are carried out in order to achieve a particular result.
- "The Planning Process Group consists of those processes that establish the total scope of the effort, define and refine the objectives, and develop the course of action required to attain those objectives".
A Guide to the Project Management Body of Knowledge (PMBOK Guide) Sixth Edition

Planning Process

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Lecture 3 I- The Importance of Planning

- The Planning Process is complex.
- Therefore, it embraces a number of steps in the Planning Process to be taken.
- In Planning, various facts are collected and analyzed and best out of all is chosen and adopted.
- It is not necessary that the Main Procedures or Steps of Planning Process which is valid for one organization may be valid for other organizations.

Planning Process

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Lecture 3 II- The main Steps of Planning Process

I-3- The 7 main areas where Project Planning is Important

According to the PMBOK, there are 7 main areas where Project Planning is important for successful projects.

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Lecture 3 II- The main Steps of Planning Process

I-3- Advantages and Disadvantages of Planning

I-3-1- Advantages / Benefits of Planning

Reduces Uncertainty	Encourages Innovation and Creativity	Ensures attention on objectives and results
Focus on Objectives/Goals	Improves Motivation	Establishes a basis for teamwork
Economical Operation	Builds Teamwork Spirit	Helps anticipate problems and cope with change
Facilitates Control	Improves Competitive Strength	Better coordination

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Lecture 3 II- The main Steps of Planning Process

- Among the most important advantages of planning, it helps to improve coordination among the different members of the Team.
- It can also improve the internal vision of the business environment, and help a Project Team to adapt quickly to the changing environment.
- To summarize, we can say that Planning is a necessary exercise in order to reduce the risk and organize production in line with the Objectives.

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Lecture 3 II- The main Steps of Planning Process

I-3-3- Constraints / Disadvantages or Limitations of Planning

Lack of Reliable Data	Costly Process	Internal Inflexibility
Rigidity Time	Rapid Change	Expenditure
Consuming Process	Internal Inflexibility	Resistance to Change

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Lecture 3 II- The main Steps of Planning Process

- Various factors that go into planning may differ from organization to Organization.
- However, general procedures of Planning involve the following steps as shown in the figure below, which can be made applicable to any Organization with minor modifications.

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Lecture 3 III- Types of Planning

III-3- On the basis of the field of use: It is divided into two parts

A. Many use plans, including several types:

Strategic	Business	Functional
High level plan to guide the organization's overall direction	Mid-level plan to guide the organization's overall direction	Low level plan to guide the organization's overall direction

B. Unique to one plan and contain:

Program	Project
group of activities or things to be achieved	sets of tasks that must be completed in order to arrive at a particular goal or outcome.

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Lecture 3 III- Types of Planning

III-4- On the basis of Functions

- Marketing Planning
- Production Planning
- Purchasing & Storage Planning
- Financial Planning
- Human - Resources Planning

III-5- On the basis of Activity

- Economic/Financial Activity
- Industrial Activity
- Structural Activity

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Lecture 3 VI- The Project Documentation

Proper Project Documentation is undoubtedly a mandatory element in managing Projects, but it is also extremely useful in keeping Projects moving at a speedy pace, ensuring all stakeholders are as informed as possible, and helping the organization make better improvements in future Projects.

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Lecture 3 VI- The Project Documentation

Document	Purpose
Project Charter	Track planning actions and open issues
Project Charter	a form of contract between the customer and contractor
Project Organization	overview of people and roles in the project
Project Roles and Responsibilities	description of roles and responsibilities
Project Plan	activities and timeline
Project Budget	project cost (open and actual)
Stakeholder Matrix	list of stakeholders involved in the project
Risk Log	critical risks
Project Communication Plan	structures communication and meetings in a project
Project Statement of Requirements	description of customer requirements
Project Request Tracker	track changes to the project scope

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Lecture 4
B-I- The Business Case

B-I-4- The 5 views or "Cases"
The 5 views or "Cases" are:

- The **"strategic case"**: there is a compelling case for change that fits with the strategic objectives of the sponsoring organization.
- The **"economic case"**: the solution represents best value.
- The **"commercial case"**: the proposed solution is attractive to the market place, can be procured on appropriate terms so it is commercially viable.
- The **"financial case"**: the proposed financial investment is affordable.
- The **"management case"**: the input required from all parties involved in the project is achievable.

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Lecture 4
B-I- The Business Case

The elements that must exist in a Business Case

Request	Market Assessment	Budget	Implementation/Project Plan
- Project details - Strategic context - Needs, goals, objectives - Benefits	- Are other resources worth this? - How will this affect other stakeholders?	- Economic analysis - ROI	- Stakeholder - Stakeholder responsibilities - Stakeholder - Stakeholder responsibilities - Stakeholder
Business/strategic, financial, operational, technical, human resources, organizational, project management			
Business/strategic, financial, operational, technical, human resources, organizational, project management			

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Lecture 4
B-II- The Feasibility Study

B-II-2- Importance of the Feasibility Study

- It describes in detail the **Resources and Constraints** of the Project:

- **techniques**
- **quality**
- **financial**
- **temporal**

all the Stakeholders are aware of the **Objectives and Challenges** of the Project before validating it and moving on to the **Scoping** phase.

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Lecture 4
B-II- The Feasibility Study

FEASIBILITY STUDY
5 Types of Feasibility Studies

- Legal Feasibility**: Is the proposed solution legal and does it comply with all relevant laws and regulations?
- Economic Feasibility**: Is the proposed solution economically viable and does it represent the best use of resources?
- Technical Feasibility**: Is the proposed solution technically feasible and does it meet the required technical specifications?
- Operational Feasibility**: Is the proposed solution operationally feasible and does it meet the required operational requirements?
- Scheduling Feasibility**: Is the proposed solution schedulable and does it meet the required timeline?

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BENEFITS OF A FEASIBILITY STUDY

1. **Identifies the most viable solution**: It helps to identify the most viable solution among the alternatives.
2. **Saves time, money and resources**: It helps to save time, money and resources by identifying the most viable solution early in the project.
3. **Reduces the risk of failure**: It helps to reduce the risk of failure by identifying the most viable solution early in the project.
4. **Helps to identify the most viable solution**: It helps to identify the most viable solution among the alternatives.
5. **Helps to identify the most viable solution**: It helps to identify the most viable solution among the alternatives.
6. **Helps to identify the most viable solution**: It helps to identify the most viable solution among the alternatives.
7. **Helps to identify the most viable solution**: It helps to identify the most viable solution among the alternatives.
8. **Helps to identify the most viable solution**: It helps to identify the most viable solution among the alternatives.
9. **Helps to identify the most viable solution**: It helps to identify the most viable solution among the alternatives.
10. **Helps to identify the most viable solution**: It helps to identify the most viable solution among the alternatives.

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Lecture 4
B-III- The Project Proposal

B-III-1- What is a Project Proposal?

- A **Project Proposal** is a document that describes a proposed Project and its **purpose, outcomes**, and the steps that will be taken to complete the project.
- A **Project Proposal** is a 2-5 page document that seeks to address key questions surrounding a major Project.
- A **Project Proposal** concisely describes what your Project hopes to accomplish, why those objectives are important, and how you intend to achieve them.
- In more general terms, it makes a case for what you Plan to do.

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Lecture 4
B-III- The Project Proposal

- While the actual elements of a **Project Proposal** differ depending on the Project, there are several key elements of a **Project Proposal**, including:
- **Project Background**: What problems, challenges, or opportunities exist that create a need for this project?
- **Objectives**: What are the intended outcomes of this project?
- **Project Scope**: What are the steps or stages of the project? What elements are included in this project? How will the objectives be reached through this project?

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Lecture 4
B-III- The Project Proposal

Why is a Project Proposal important?

- 1. **Project Background**: It provides context for the project and explains why it is important.
- 2. **Project Objectives**: It clearly defines the project's goals and objectives.
- 3. **Project Scope**: It defines the project's boundaries and what is included and excluded.
- 4. **Project Budget**: It provides a clear picture of the project's financial requirements.
- 5. **Project Risks**: It identifies potential risks and how they will be managed.
- 6. **Project Benefits**: It explains the benefits of the project and how they will be realized.
- 7. **Project Conclusion**: It summarizes the project and provides a clear recommendation.

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Lecture 4
B-III- The Project Proposal

B-III-2- Characteristics of the Project Proposal

Below are a few characteristics of the Project Proposal:

- A Project Proposal outlines the Project that needs to be accomplished.
- Explains why the Project should be carried out and what is the aim of the Project.
- Aims to persuade a Sponsor and/or a group of Stakeholders that the Team and the Project Manager are capable of bringing a Project to a successful end.
- Explains the Management Plan.
- Aims to persuade readers regarding the availability of Resources required to complete the Project on time and within Budget.

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Lecture 5 I- The Project Stakeholders

5-5-How to do a Stakeholder Analysis?

- As soon as your Project Charter is complete and the Scope of your Project is defined, you can use it to start mapping out your Stakeholders.
- Here's how to get the ball rolling with a basic stakeholder analysis process.

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Lecture 5 I- The Project Stakeholders

3. Identify your stakeholders

First step, you need to identify who your Stakeholders actually are. To do this, draw on your project Charter and any other Project Plans and Documentation to compile a full list of your project Stakeholders, both internal and external.

Keep in mind that some stakeholders won't come into play until later in the project lifecycle - but if you can anticipate who they'll be in advance, you can start to get them buy-in, build the relationship from the outset, and help them to feel involved from the beginning.

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Lecture 5 I- The Project Stakeholders

3. Prioritize your stakeholders

Once you've identified all of your Stakeholders, you can start to prioritize them. It helps you, as the Project Manager, to identify who the key decision makers are at any given moment, so you can ensure that you're talking to the right people, at the right time.

There are a few methods of doing this Stakeholder Prioritization, but one simple way is to plot them out using a Power/Interest grid or Power/Influence grid or Impact/Influence grid. The Power/Interest grid helps you to identify who the key stakeholders are by answering two key questions that help you to group them into one of four categories.

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Lecture 5 I- The Project Stakeholders

Q2: What level of power do they have?

- How important is it that they're happy with the project's progress and results?
- How integral are they to the project's success?
- How influential are they to the project, to other stakeholders, to the team, and so on?

(a stakeholder's influence can be positive or negative)

Q2: What level of interest do they have?

- Is this project super important to them, or are they only tangentially connected to it?
- Is it something they're directly accountable for?
- Are they reliant on it for other work or results?
- Are they opposed to the project or concerned about it in some way?

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Lecture 5 I- The Project Stakeholders

As we can see from the (highly technologically-advanced!) matrix above, stakeholders who fall into the top-right quadrant (powerful + interested) are the ones you should be giving extra attention to, because they're the ones who can have the most impact on your project - for better or for worse.

The matrix is a 2x2 grid with 'Influence on Project' on the vertical axis and 'Interest in Project' on the horizontal axis.

- Top-Right (High Influence, High Interest):** Engage & Consult
- Top-Left (High Influence, Low Interest):** Keep Satisfied
- Bottom-Left (Low Influence, Low Interest):** Monitor
- Bottom-Right (Low Influence, High Interest):** Keep Informed

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Lecture 5 I- The Project Stakeholders

Stakeholder	Power/Interest	Management Strategy
High Power / High Interest	High Power / High Interest	Keep Satisfied
High Power / Low Interest	High Power / Low Interest	Keep Informed
Low Power / High Interest	Low Power / High Interest	Engage & Consult
Low Power / Low Interest	Low Power / Low Interest	Monitor

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Lecture 5 I- The Project Stakeholders

- We can also identify the key roles and responsibilities against major tasks within a Project, by the RACI Chart or Matrix, which serves as a record of the role each person on a team is playing.
- Creating the RACI Chart is also an excellent exercise in balancing workload and establishing the decision-maker.
- RACI is a type of Stakeholder analysis, just like a Power Interest Grid.

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Lecture 5 RACI matrix example

Project Activity / Deliverable	Project Manager	Stakeholder	Stakeholder	Stakeholder	Stakeholder	Stakeholder
Project Charter and authorisation	A					
Requirements	A	R				
Business performance requirements	A	R				
Code design	A	R				
Develop solution	A	R				
Approve construction work	A	R				

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Lecture 5 I- The Project Stakeholders

3. Understand your stakeholders

Now that you know who the key players are and which ones to prioritize, you need to get a full grasp of their expectations for the Project.

where possible, try to develop a full understanding of what matters most to your Stakeholders, as this has important implications for the success of your Project. The person you serve, the people you serve, and the impact that you will need to achieve and maintain.

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Lecture 5 I- The Project Stakeholders

3-2- The Project Analysis

- But most Project Managers don't have time for "on-the-ground" stuff like gathering data and doing paperwork.
- That's why organizations hire Project Analysts who help the Project Manager to plan and manage Projects.
- They provide the Project Manager with much of the data they need to make the big picture decisions.

3-3- The Steering Committee

- A Steering Committee is a form of corporate governance made up of high-level executives, authorities, or stakeholders who provide strategic oversight and guidance to one or more projects within an Organization.
- When these people meet, it's called a Steering Committee meeting.

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Lecture 5 III- High-level Milestones

3-2- What is a Project Milestone?

- A **Milestone** is a marker in a Project that signifies a change or stage in development.
- Project Milestones mark specific points along a Project's Timeline.
- They are checkpoints that identify where activities or groups of activities have been completed or where a new phase or activity is launched.

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Lecture 5 III- High-level Milestones

- Milestones are powerful components in Project Management because they show key events and map forward movement in your Project Plan.
- Milestones act as signposts through the course of your Project, helping ensure you stay on track.
- Without Project Milestones tracking, you're just monitoring tasks and not systematically following the right path in your Project.
- You can differentiate Milestones from other elements of a Timeline because they take no time to complete, think of them as signposts that keep things on track.

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Lecture 5 III- High-level Milestones

- A milestone schedule, or milestone chart, is simply a timeline that uses milestones to divide a project schedule into major phases. Due to its simplicity, it's used when project managers or sponsors need to share an overview of the project schedule with stakeholders or team members without going into every detail.
- When you plan a project, you consider all possible details, from main goals to schedules. These details can have regular adjustments, so it's critical to establish them to let your team understand how to achieve their final objectives.
- Here's how a project planning milestone example can be visualized in a Gantt chart.

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Lecture 5 III- High-level Milestones

Project planning: 08.08.2021 - 10.08.2021

The Gantt chart shows a timeline from 08.08.2021 to 10.08.2021. It includes milestones for 'Meeting with stakeholders', 'Consultation budget approval', 'Consultation of constructive completion dates', 'Review alignment', 'Consultation with stakeholders', 'Project planning', and 'Consultation phase 1'.

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Lecture 5 III- High-level Milestones

3-2- Why are Project Milestones important?

- Milestones are powerful because they demonstrate forward progress in your Project Plan.
- They help motivate and align the Project Team by enabling everyone to view progress and judge priorities.
- And they help you monitor deadlines, identify important dates, and recognize potential bottlenecks within the Project.
- If you, as a Project Manager, were to strip the tasks from your Project Timeline, the Milestones would still give an outline of the key steps or phases of the Project.

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Lecture 5 III- High-level Milestones

5 reasons why key Milestones are important to Project Success

- Milestones improve Project delivery. Milestones break a large, complex Project into smaller phases.
- Milestones facilitate communication with stakeholders. Milestones help you track project progress. It's a way to measure your progress, and how far are you from completing the Project?
- Milestones ensure team engagement. The project leader should have to be involved in all progress and work meeting. It's also an opportunity to communicate with team and sponsors. Remember, as you build, you can give your team a clear and solid idea, take time to look at what you're doing.
- Milestones keep stakeholders and the team on track. Milestones serve as reminders to stakeholders about important project events.
- Project Milestones are an advantage.

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Lecture 5 IV- Project Requirements

3-2- Project Requirements Categories

Business requirements	Solution Requirements	A Stakeholder
They are the high-level needs of the business.	They include both functional and non-functional requirements. They are the specific features and characteristics of the product or service that meet all requirements, both Business and Stakeholder.	Every individual Stakeholder has specific needs or requirements that they want to be fulfilled. Often, times, stakeholders have competing needs, which can impact the schedule, budget and scope of the project if not managed effectively.

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Lecture 6 I- The Project Schedule

9-2 The 4 main types of Project Schedule

- There are many ways that the Project Schedule can be displayed to meet the needs of the target audience using it.
- The 4 commonly used schedule formats are:

1- Master Project Schedule	2- Milestone Schedule	3- Detailed Project Schedule
It's a summary level schedule that highlights the key tasks and the estimated duration. It's used as a high-level overview to provide management with a clear view of the project.	It tracks major milestones but not every task or activity. It's great for reporting status and helping stakeholders see the progress at a glance.	This is a more operational level schedule that tracks every project activity. It's designed for the Project Team and Managers to keep track of every element of the project.

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Lecture 6 I- The Project Schedule

Schedule Network Analysis

A graphic that depicts the interrelationships and timing of all project activities in chronological order.

Activity-on-Arrow (AOA) and Activity-on-Arrow (AOA)

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Lecture 6 I- The Project Schedule

Critical Path Method

The Critical Path Method adds the times of all critical activities, taking into account dependencies, to determine the earliest time that the Project can be completed.

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Lecture 6 I- The Project Schedule

PERT Charts

The Program Evaluation and Review Technique uses a different method to estimate the time required to complete the critical path activities. For each activity, the shortest time, the longest time, and the most likely time are estimated for each task. The three estimates for each task are then averaged to give the expected time for each activity.

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Lecture 6 II- Project Budget

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Lecture 6 II- Project Budget

9-3 How to estimate budget for a Project

Estimating is a critical skill for a Project Manager and one that takes time to master. To help you build your budgeting competency, we've created a step-by-step guide for you to use as a checklist to ensure you cover all bases.

1. Refer to your Project Scope - The Project Scope contains the goals, deliverables, tasks, and deadlines for the project.
2. Define the Resources you need, list all the people and items that you need to complete the project within deadlines.
3. Understand the Resource Rate: people who will be working on the project will work at a specific rate, with more experienced people earning more, but often able to complete tasks faster and to a higher standard. Materials for the project get charged at a rate too.

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Lecture 6 II- Project Budget

9-4 Assign Budget estimates: say that you have a lot of resources, begin assigning a number to each, each project will be different, but here are some estimating techniques to get you started.

1. Use historical data
2. Use similar
3. Consult Subject Matter Experts (SMEs)
4. Consult suppliers

9-5 Establish a contingency fund: Having an emergency fund means there's a reserve for when things go wrong.

9-6 Obtain approval: When you're presenting your budget to management or stakeholders, you need it to be right. You'll also need to be able to confidently justify the thinking behind the numbers.

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Lecture 6 II- Project Budget

9-6 9 important tips for better project budgeting

1. Watch Project Scope like a hawk: there's no sure way to blow budget than the divided budget creep.
2. Divide your Budget into useful timeframes: for example, you might want to allocate weekly staff costs so that you can quickly address concerns rather than leaving it until the end of the month (at the end of the project) when any issues have compounded.
3. Try not to let your contractors know what your contingency is: let the expectation that they can't exceed the budget unless you know about it well in advance and can manage it accordingly.
4. Involve others: Consult experts inside and outside of your organization to learn from them. So, communicate widely, and often.

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Lecture 6 II- Project Budget

9-7 Important tips for better project budgeting

1. Understand your Budget: whether you are using spreadsheets, budget templates, or from sophisticated software, keep track of your assumptions and calculations so that you remember how you arrived at your budget estimate.
2. Don't fall for the Innovation-Mapping Trap (IMT) trap: make sure you track and consistently throughout. Map a budget breakdown because of IMT confusion.
3. Consider lag: With a schedule, you know immediately if you've passed a date, but in most companies, financial information is delayed because of reporting practices, outdated your finance systems and account for them during your Project.
4. Update the Budget in real time: if there are changes, you need to update your Budget regularly to you and your team are tracking against the right numbers.
5. Record the lessons you learn along the way: this will help you and others in future projects.

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Lecture 6 III- Project Risks

9-2- What are risk categories?

- Categories of Risk are specific elements within a Project or its operational environment that could go wrong during the planning, implementation, or following phases of an activity.
- These Risk Categories consider things such as costs, timeline, available staff, public reception, and available inventory.
- They look at the details that go into making a successful Project and consider what would happen if one or more of those details veered off course.

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Lecture 6 III- Project Risks

9-3 Risk Categories can be defined as:

The classification of Risk at per the Business Activities of the organization and provides a structured overview of the organization and potential risks faced by them.

Most commonly used Risk classifications include Strategic, Financial, operational, people, regulatory and finance.

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Lecture 6 III- Project Risks

9-4 Why do you use Risk Categories?

- Risk Categories help identify risks.
- It ensures that the users can track the origin of the underlying and potential risks faced by a Project.
- These categories help determine the efficiency of the control systems implemented in all the departments of a Project.
- It ensures that risk identification is made comprehensively, covering all the probable aspects of the underlying and upcoming risk conditions.
- With these categories, users can determine the areas that are highly prone to risks, and it even allows in the identification of standard and probable causes.
- With Risk Categories, users can even develop appropriate risk dealing mechanisms.

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Lecture 6 III- Project Risks

9-5 Top 4 Types of Project Risks

- A Risk Breakdown Structure outlines the various potential risks within a Project. There are four main types of Project Risk: Technical, External, Organizational, and Project Management.

1. Technical risks	2. External risks	3. Organizational risks	4. Project Management risks
Technical risks refer to the risks that could impact your Project that are outside of your organization's direct control.	External risks refer to risks that could impact your Project that are outside of your organization's direct control.	Organizational risks refer to risks that could impact your Project that are outside of your organization's direct control.	Project Management risks refer to risks that could impact your Project that are outside of your organization's direct control.

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Lecture 6 III- Project Risks

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Lecture 6 IV- Project Communication

9-2 How to Develop a Project Communication Plan

When developing a Communication Strategy, here are a few questions to ask:

Who needs to be informed?	Who needs to know what?	What kind of communication will be required?
Project Team Members Stakeholders Sponsors Clients	How the CIO need to know about a delivery delay?	Team and Management meetings, Project updates
How frequently will communication be needed?	What details must be communicated?	
Weekly? Monthly?	Meeting notes, problems, solutions?	

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Lecture 3
A-III-How to Develop a Project Charter?

III-2- Visualizing the Project Charter

- Usually, a **Project Charter** spans for five pages. This is one of the major reasons why they get overlooked in the Project Management Process.
- An easier way to write a **Project Charter** that everyone can quickly read and understand, with minimal effort is through **visualizations**.
- Project Charters** that incorporate **graphic elements** like the ones below help you bring together all **Project Charter** elements onto one page. They are easy-to-read and instantly pleasing.

How to Develop a Project Charter

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Lecture 3
A-III-How to Develop a Project Charter?

III-2- Visualizing the Project Charter

How to Develop a Project Charter

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Lecture 3
A-III-How to Develop a Project Charter?

III-2- Visualizing the Project Charter

How to Develop a Project Charter

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Lecture 3
A-III-How to Develop a Project Charter?

III-2- Visualizing the Project Charter

How to Develop a Project Charter

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Lecture 3
A-IV- Project Charter vs some other Project Documents

A-III-2- Project Proposal vs Project Charter

- The **Project Proposal** is a document that contains the details of the Project that the Organization wants to implement.
- This document is presented to the donor for the purpose of reviewing it and deciding whether the donor will finance the proposal or not.
- The way **Project Proposals** are written varies from one Organization to another and from one donor to another.

Project Proposal

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Lecture 3
A-IV- Project Charter vs some other Project Documents

- Project Proposal** and **Project Charter** are two different documents and their purposes are different as well.
- Both **Proposal** and **Charter** are crucial Project Documents that outline very different concepts within a project.
- However, many PMP applicants mix up them because they sound quite similar.

Project Proposal

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Lecture 3
A-IV- Project Charter vs some other Project Documents

PROJECT PROPOSAL VS PROJECT CHARTER

- Takes place in the initiating phase. - The owner is project sponsor. - The proposal is created prior to the project approval. - Reference document which defines the project objectives.	- Takes place in the planning phase. - The owner is project manager. - Project charter is created once the proposal is approved. - Reference document that summarizes the stakeholders.
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Project Proposal

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Lecture 9

II- Importance of the Key Performance Indicators

II-3- Key Performance Indicator Characteristics

- Many **KPI** characteristics are identified in the literature.
- A KPI does not need to satisfy all of these characteristics to be useful to the organisation and characteristics may overlap.
- A KPI should be:
 - relevant** and consistent with the specific organisation's vision, strategy and objectives
 - focused on organisation wide strategic value** rather than non-critical local business outcomes. selection of the wrong KPI can result in counterproductive behaviour and sub-optimised outcomes;
 - representative**: appropriate to the organisation together with its operational performance;

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Lecture 9

II- Importance of the Key Performance Indicators

II-3- Key Performance Indicator Characteristics

- realistic**: fits into the organisation's constraints and cost effective.
- specific**: clear and focused to avoid misinterpretation or ambiguity.
- attainable**: requires targets to be set that are observable, achievable, measurable and credible under expected conditions as well as independently validated.
- measurable**: can be quantified/measured and may be either **quantitative** or **qualitative**; used to identify trends - changes are infrequent, may be compared to other data over a reasonably long time and trends can be identified.

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Lecture 9

II- Importance of the Key Performance Indicators

II-3- Key Performance Indicator Characteristics

- timely**: achievable within the given timeframe;
- understood**: individuals and groups know how their behaviour and activities contribute to overall organisational goals;
- agreed**: all contributors agree and share responsibility within the organisation;
- reported**: regular reports are made available to all stakeholders and contributors;
- governed**: accountability and responsibility is defined and understood; and
- evaluated**: the program is cost effective and adequately reviewed throughout its lifetime

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Lecture 9

II- Importance of the Key Performance Indicators

II-3- Why are KPIs important?

5 REASONS WHY YOU NEED KPIs

- To understand your company's financial health
- To measure employee productivity
- To identify areas of improvement
- To monitor progress on key goals
- To make decisions on available opportunities

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Lecture 10 II- The 3 Phases of the Project Closure Process

- The three phases of project closure are technical, learning, and people.
- During the technical phase, close up loose ends. For the learning phase, evaluate what did and didn't work, as well as how to improve. In the people phase, appreciate team members.
- Take these steps during each phase of closing a project.
- By following this quick and easy guide to project closure steps and related activities, you're building a stronger future for yourself, your team, and your organization.

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Lecture 10 II- The 3 Phases of the Project Closure Process

II-1-Technical Phase

- The technical phase, while a bit on the bureaucratic side, creates a true sense of finality (and success) among the team and for the organization. A great project lifecycle enables you to do the following:

To ensure that	How to ensure it
all the project's work is complete and ready for final review	Make sure everyone is on the same page. Use a checklist to ensure that all the project's work is complete and ready for final review.
the project's closure is documented	Use a project closure checklist to ensure that all the project's work is complete and ready for final review.
the project's closure is communicated	Use a project closure checklist to ensure that all the project's work is complete and ready for final review.

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Lecture 10 II- The 3 Phases of the Project Closure Process

II-2-Learning Phase

- We want all projects to be both challenging and manageable, but sometimes not everything goes as planned. Occasionally you encounter a glitch along the way.
- No matter what happens during a project's lifecycle, learning is always present.
- The learning phase of project closure is a time dedicated to team reflection on what you've done, how you've done it, and what you've learned now that the project is complete.
- There are multiple ways to foster project closure or learning and growth, both for the organization as a whole and for individual team members. Doing so will likely lead to greater satisfaction and risk-taking associated with doing project work.

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Dedicate Time for Team Reflection

Consider what you've done, how you've done it, and what you've learned now that the project is complete.

Document Lessons Learned

The learning phase brings lessons learned to the forefront and documents them for the benefit of your team today and for future reference when you or a colleague initiate a new project.

Respond to Questions about the Current Project

Now is the time to document organizational and project memory that's accessible to all relevant parties. One way to ensure you've addressed all issues is to respond to questions about the current project, then making that information accessible to all relevant parties.

Facilitate Discussion and Reflection in a Team Setting

The learning phase, just like the other phases, mostly involves holding team discussions about the project. Learning that takes place as a result of a team project helps to feed organizational success, just as important, the project can achieve individual team members' professional development and sense of mission.



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Lecture 10 II- The 3 Phases of the Project Closure Process

II-3- People Phase

- Take the time to commemorate what you've accomplished as a team. You've come to know the team well and have a good sense of the team's personality.
- Make the most of the camaraderie you've developed to celebrate in a way that's right for your team within your organization.
- Remember, the team made the project deliverables possible, and recognizing those efforts and the need for emotional closure will leave everyone feeling good and ready to move on, whatever comes next.

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Lecture 10 II- The 3 Phases of the Project Closure Process

- Depending on the context, it may be appropriate to invite the **Upper-level Supervisor** who gave the green light for the Project to participate, too.
- Each **Project Closure** phase helps to create an **Organizational Culture of appreciation, gratitude, and accomplishment**.
- Take the time to do this right, in ways meaningful to your specific circumstances, and you've set the stage not just to move on but also to take a step forward.

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Lecture 10 V-Project Closure Best Practices

Below is a guideline that Project Managers could use to close their Projects comprehensively:

1. Review those agreements and any and all other agreements, letters, parties who will use the product(s) of the project have the necessary training, tools, documentation, and capability to perform their role.
2. Ensure that the Project has satisfied the **strategic goal(s)** for which it was undertaken.
3. Acknowledge that the whole **scope of work** has been completed, and make sure to receive formal documented acceptance from the **Client and Sponsors**.

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Lecture 10 V-Project Closure Best Practices

- Review all Contracts with the Project Team and Suppliers. Make sure that all parties have satisfied their contractual obligations—that the Suppliers have delivered all of the products or services required of them and that the Organization has made all pertinent payments. Review bills of lading, and make sure the Suppliers provided all supplementary deliverables, which may include, but may not be limited to **Product Documentation, Drawings, Warranties, Service Contracts, User Manuals**, and so forth.
- Review Project Management Practices.
- Document Lessons Learned for future reference.
- Dismiss the Project Team and officially return Resources to their functional locations.

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Lecture 10 V-Project Closure Best Practices

- Successful Project Closure ties every aspect together:

What you've done	How you've done it	Why it's important
Don't be shy about tapping into your best technical expertise and business-oriented, celebratory left to this critical phase of every project.		
Keep a handy list of Project Closure best practices.		

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Team as a Community

Project Closure requires professionalization, but that doesn't mean rigidity or checking boxes. Make sure the team feels safe sharing and participating in each phase of Project Closure. Each Team Member brings their own skills, experience, and perspective to the project, so be sure to use the stage for an open conversation. But encourage everyone to contribute in ways they feel comfortable. Especially during the **Learning Phase**, when you realize what's worked well and what team members think could be better next time, it's important to invite the purpose of sharing ideas and reflections on the Project's Process and final Outcomes.

Create Space for Best Team Member Performance

The best Project Closure takes place over a period of time. You may have a week to tie up everything or only a few days. Do your best to create emotional space between each project closure phase. This may help ensure each team member is fully present and able to contribute fresh ideas and reflections that are neither rushed nor muddled. If your team works best in the morning, schedule project closure phases on staggered meetings over the course of a week.

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Communicate in a Purposeful and Clearly Defined Manner

Set the stage for Project Closure and each of its phases through clear communication.

During your last meeting before Project Closure begins, inform the Team what Project Closure is, why it's important, and how you'll accomplish Project Closure as a team over each phase.

Provide a review of Project Closure Goals and your Process for accomplishing them or writing.

At each step of the Project, you've brought the team together and created **Team Bonds** because you've communicated well and with respect. Project Closure requires the same careful attention to the team to ensure the **best possible outcomes** for them, you, and the Organization.

Assign Closing Tasks to Team Members

Write the project manager, but that doesn't mean you have to or should be doing all of the project closure work. Teams are collaborative by nature. Bring the strong collaborative nature of the project going throughout each phase of project closure. Assign roles, ask for volunteers to keep track of project closure deliverables, and be center yourself by giving other team members to handle project closure phases.

Build a Foundation for Organizational Success

Great Projects are great Teams that get along well and communicate well and quickly and easily.

Great Teams may struggle to work together or to achieve Project Goals for technical reasons outside of their control.

Great Projects may have both qualities of different projects in the Project.

No matter the situation, remind the Team why you're there, what you've learned, and how project closure helps to professionalize — and possibly avoid — Project Issues in the future.

No Project can truly inspire organizational success and affect satisfaction both today and in the future.

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