Project Management Skills

This course will provide you with a high-level overview of an effective project management process as well as provide you with tools and additional resources for deeper study.

- Introduction
- What is Project Management?
- Process Overview
- Step 1: Define The Project
- Steps 2 & 3: Define and Organize Tasks
- Steps 4-6: Making it Fit
- How to Create a Project Plan
- Project Scheduling Techniques

Lesson 1 of 11

Introduction

Learning Objectives

By the completion of this course, you will be able to:

- Define project and project management
- Explain the importance of project management
- Describe the relationship between scope, cost, time and quality
- Describe the three phases of project management
- Describe the 12-step project management process

CONTINUE

Lesson 2 of 11

What is Project Management?

What Is a Project?

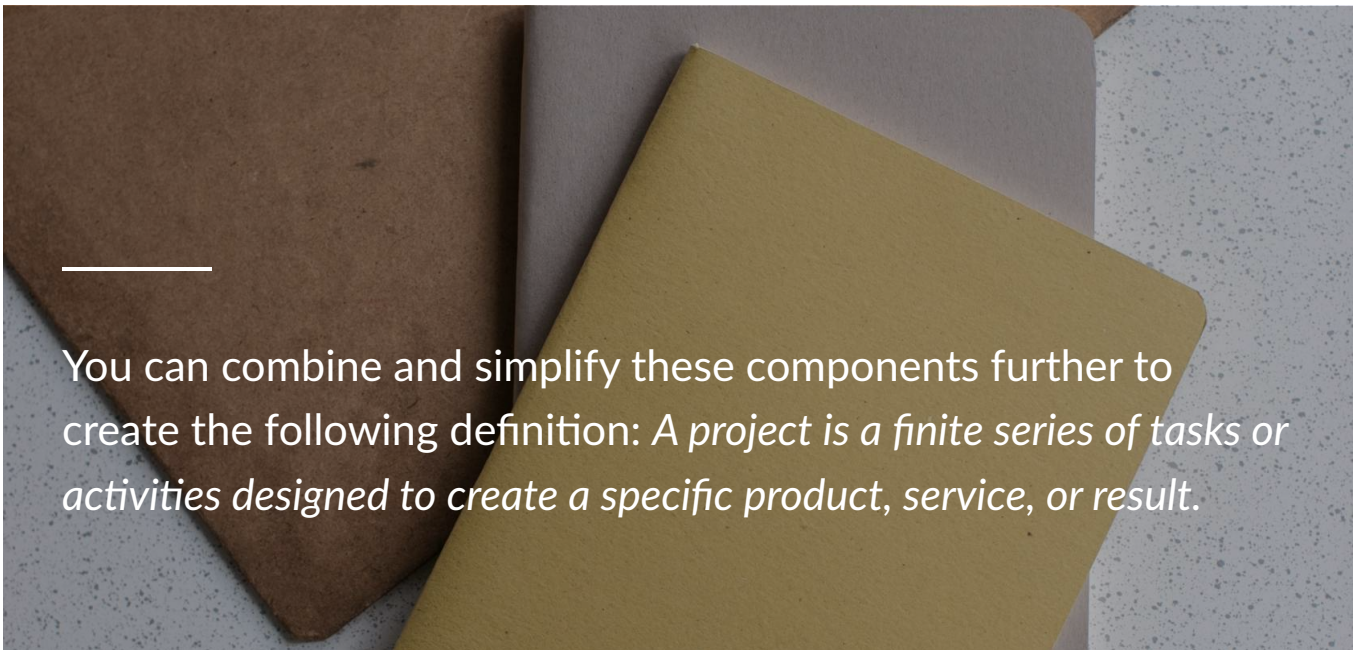
Project management involves the planning and execution of projects. So, the first question then follows: What is a project?

A project is defined by three, main characteristics:

1. **Goal-oriented.** First, a project has a defined objective. It has a particular aim or result that the project is designed to achieve, such as the creation of a new product feature, a marketing strategy, or an online course.

2. **Temporary.** Second, a project is temporary. If a project has a defined goal, then it also has a set start and end date. The end date is often determined by the deadline for achievement of the project's goal.

3. **Unique**. Finally, a project is temporary, but its goals are also specific and unique. A project is not a regular, ongoing business operation. For example, checking your emails is a routine responsibility, not a project.



You can combine and simplify these components further to create the following definition: *A project is a finite series of tasks or activities designed to create a specific product, service, or result.*

What Is Project Management and Why Do We Need it?

Project management is the discipline of initiating, planning, executing, monitoring, and closing a project. In simple terms, project management is the process of leading a project from start to finish.

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Imagine This

Consider the following real-world scenario to gain a more concrete understanding of project management.

Imagine that your team wants to create a new e-book by the end of the month. Why? You want to offer the e-book as a free downloadable resource for users who subscribe to your email list. The creation of the new e-book is a project. It has a clear goal, defined start and end dates, and it's unique. Now, what happens next? Check off each step as you read it.

- [ ] **Define the goals and vision.** Someone needs to decide what the e-book should be about and communicate a vision for how it should look and feel. That person will likely want to collect data from the marketing team to learn what content best resonates with your audience.

- [ ] **Write**. Someone will need to write the content. That person will need to do research, pull from the right sources, create an

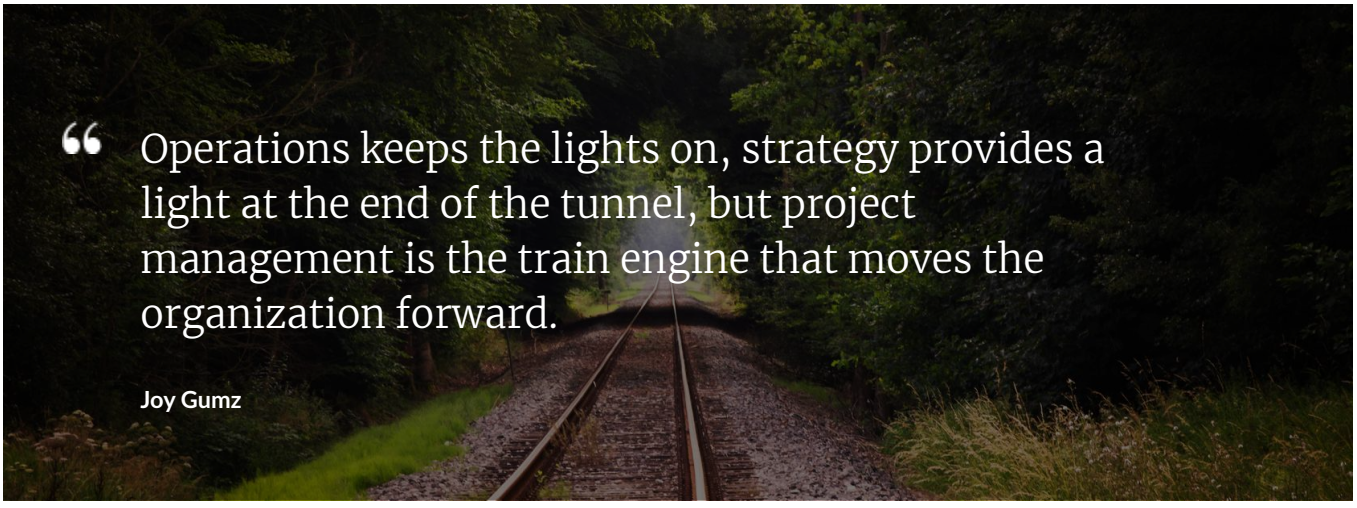
outline, and fill in the details.

- [ ] **Edit (and edit again).** The written content will likely need to go through several stages of editing and revisions.

- [ ] **Design**. You'll also need designers to make the e-book look visually appealing while also complementing the educational content.

- [ ] **Review**. In the end, someone with authority will need to check for quality and determine if the e-book is ready to post on your website.

These are just a few of the many tasks required to complete this project. The list doesn't even mention all of the communication, coordination, delegation, and scheduling involved. Accomplishing these tasks without someone overseeing it would be difficult.



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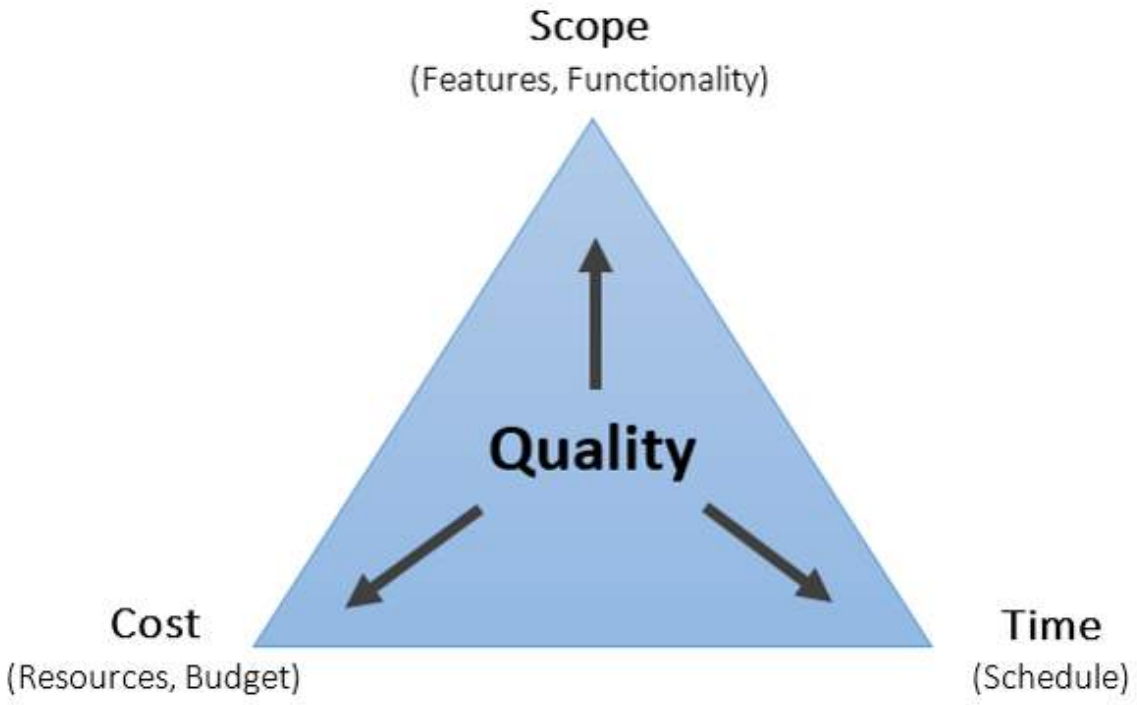
The Three Constraints of Project Management

Project managers must deliver on project objectives while working within three constraints—cost, scope, and time. Flip each card to learn more about the constraints.

Cost	Cost refers to the financial resources allocated for a project. What's the budget?
Time	Time is the duration of time you have to complete a project. What's the deadline?

Scope	Scope covers the breadth and complexity of a project's deliverables. What tasks, features, or deliverables are involved in the project?



Cheap, Fast and Good

In other words, project managers must balance a project that's cheap, fast, and good.

These constraints are interconnected—changes to one constraint will have a push or pull effect on the other two.

Consider the effect of the following changes to each of the three constraints:

- **Reduce cost.** If a client wants to reduce the cost, or budget, of a project, then you may compensate for it by increasing the amount of time it takes or reducing its scope.
- **Reduce time.** If you reduce the time allotted to complete a project, then you'll likely need to increase the cost or reduce the project's scope to meet the new deadline.
- **Increase scope.** If you increase the scope of a project or add more deliverables, then you may need to increase the time or cost of the project to account for the extra work.

Quality Is at the Intersection

At the intersection of cost, time, and scope is a project's quality. For example, increasing the amount of time your team has to complete a project will likely increase the quality of the final product. Decreasing the financial budget of a project risks decreasing its quality. You can explain this model to internal stakeholders or external clients to express project limitations and find the right balance between the three.

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Summary

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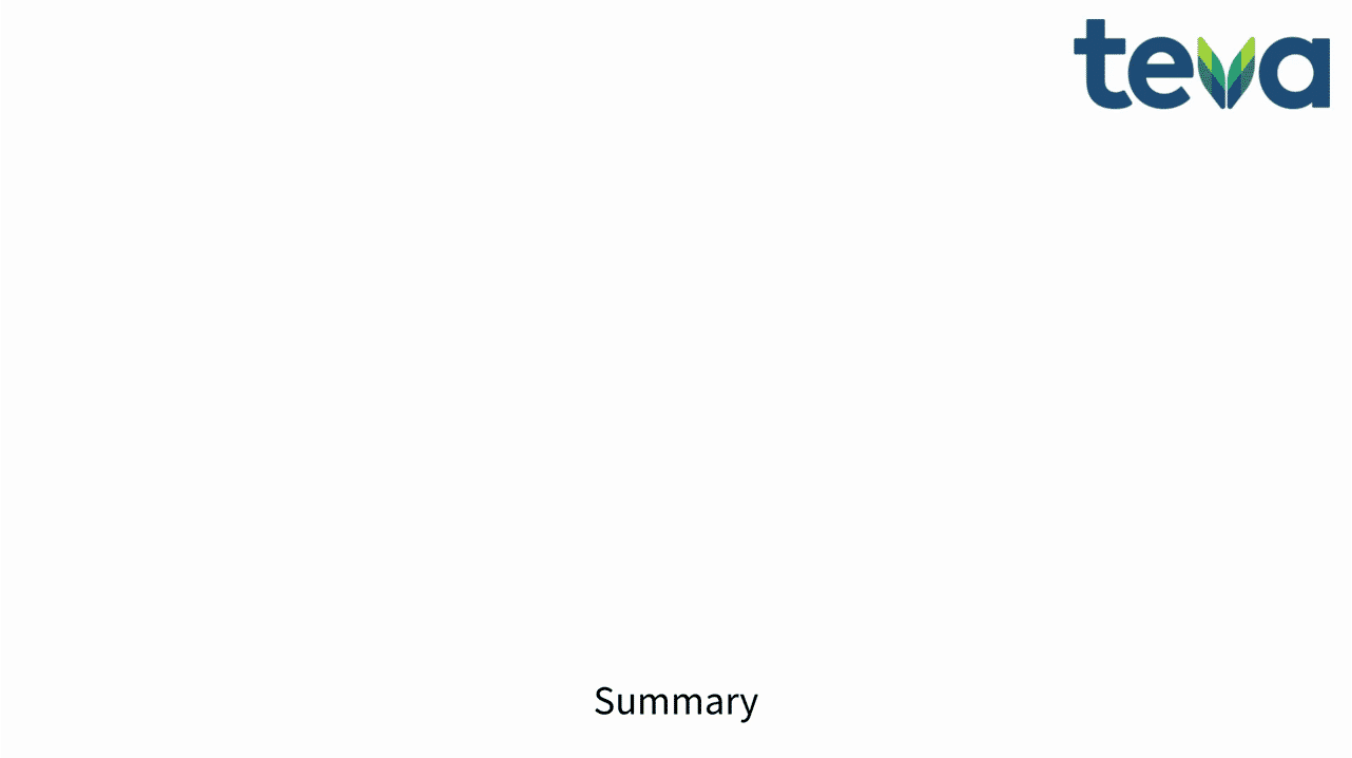

Research project management frameworks. You do not need to reinvent the wheel when it comes to project management. There are various project management frameworks and methodologies that have been tested and standardized by project managers across industries. Research and study the different approaches to project management and choose the best fit for your team and project.

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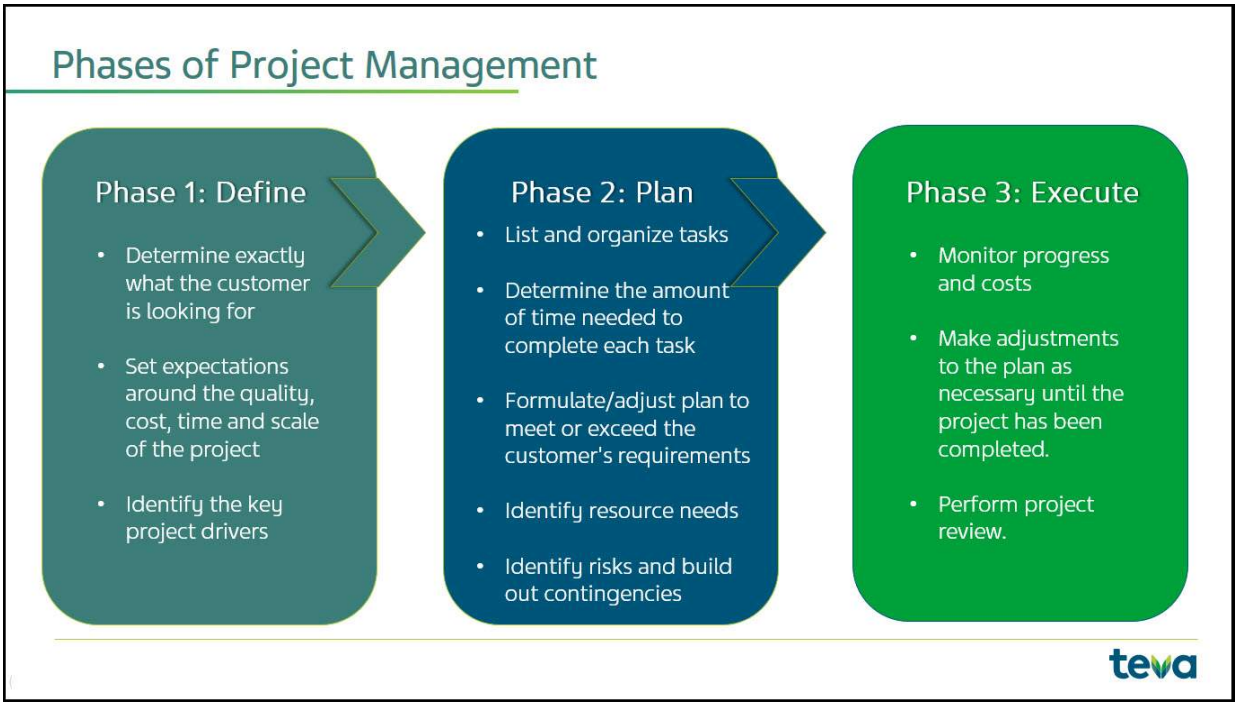
Process Overview

Project Management generally comprises of three phases: defining the project parameters, planning, and actually doing the project. Let's take a look at some of the characteristics of each phase.

Before you begin, you must find out exactly what the customer wants and how much they can afford. It is vital to agree to exactly what the customer is going to get in terms of quality, cost, time and scale. You will identify the key project drivers in this stage.

In this stage, you will list out all the tasks, organize them in logical order and estimate how long each task will take. Based on this information, you'll be able to look for opportunities to adjust the plan to meet or exceed the customer's requirements, determine what

The last three steps involve doing the work. Here you'll monitor the progress and cost and make adjustments to the plan as necessary until the project has been completed. Once the project has been completed, you'll perform project review.



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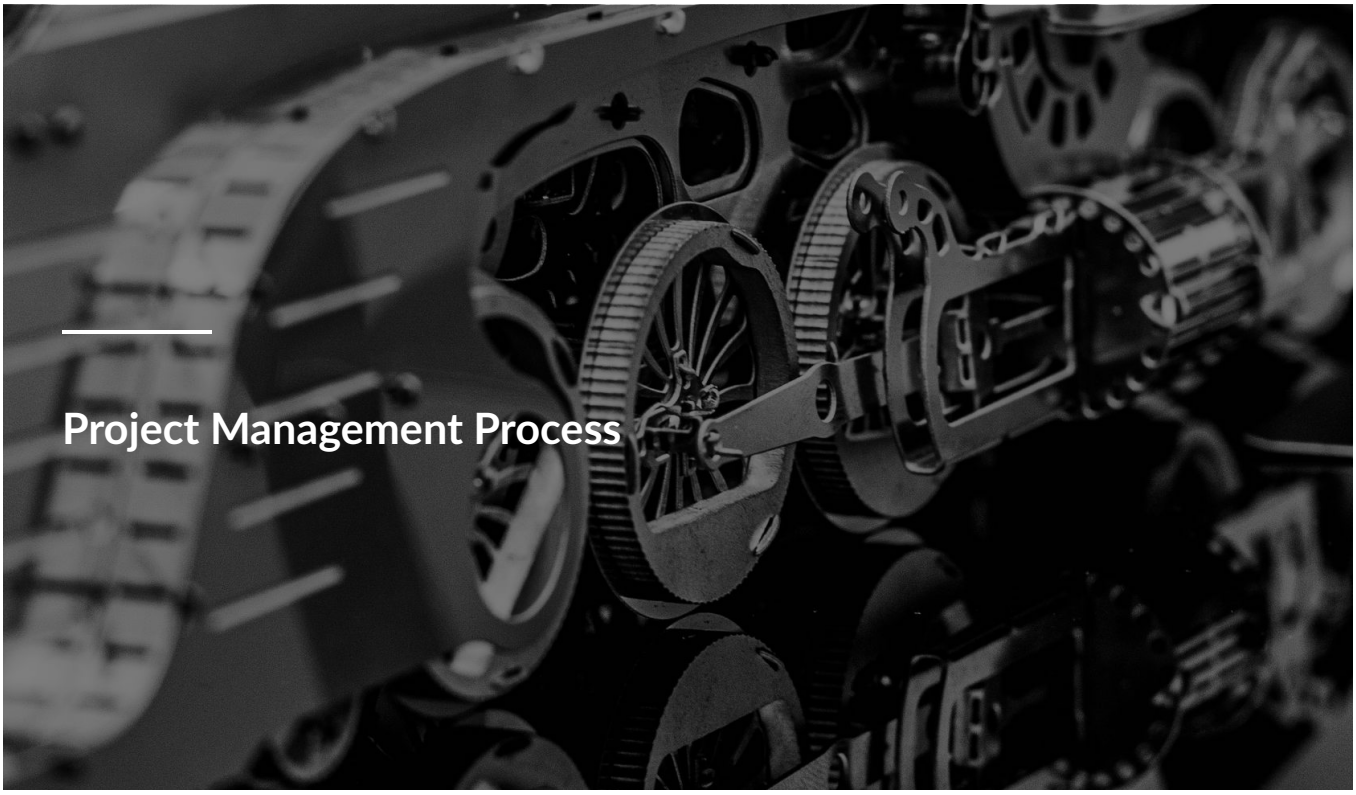
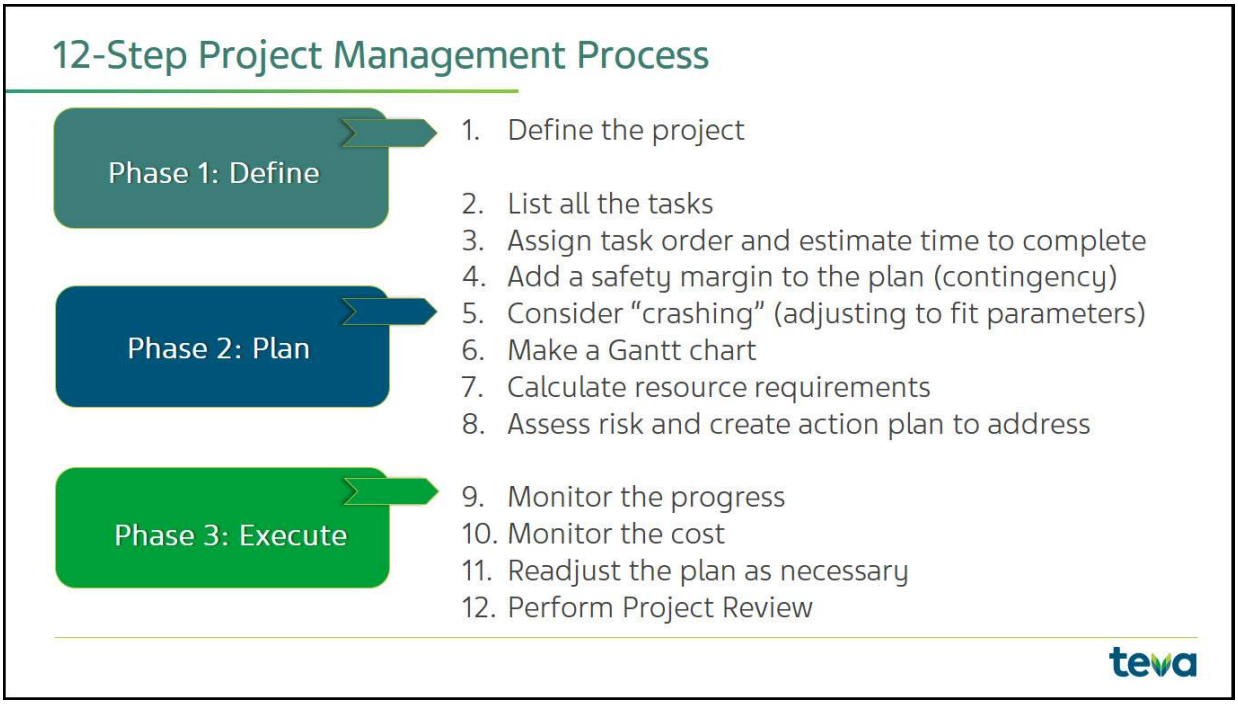


Project Management Process

The tasks that must be accomplished within the phases can be simplified into twelve steps:



Next, let's look at each step in greater detail.

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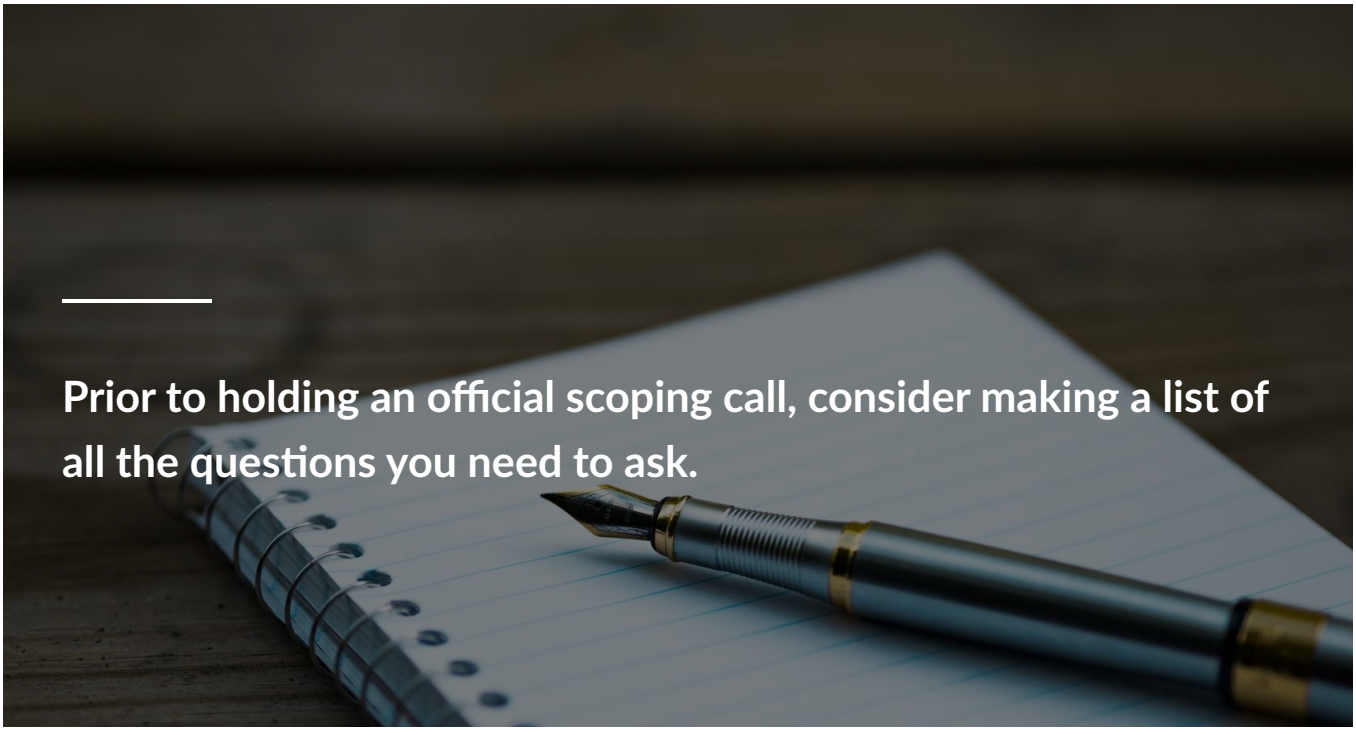
Step 1: Define The Project

Before you begin a project, it is essential to gather as much relevant information as possible.

Every customer wants a project that is cheap, fast, and good.

You must determine what the customer is looking for in terms of quality, cost, time and scale, and what can you realistically deliver within the identified parameters.

It’s also important to identify the project sponsors, key decision makers and subject matter experts in this stage of the project.



Some tools you can use to help you to get really clear on the project parameters include a project charter and scoping documents.

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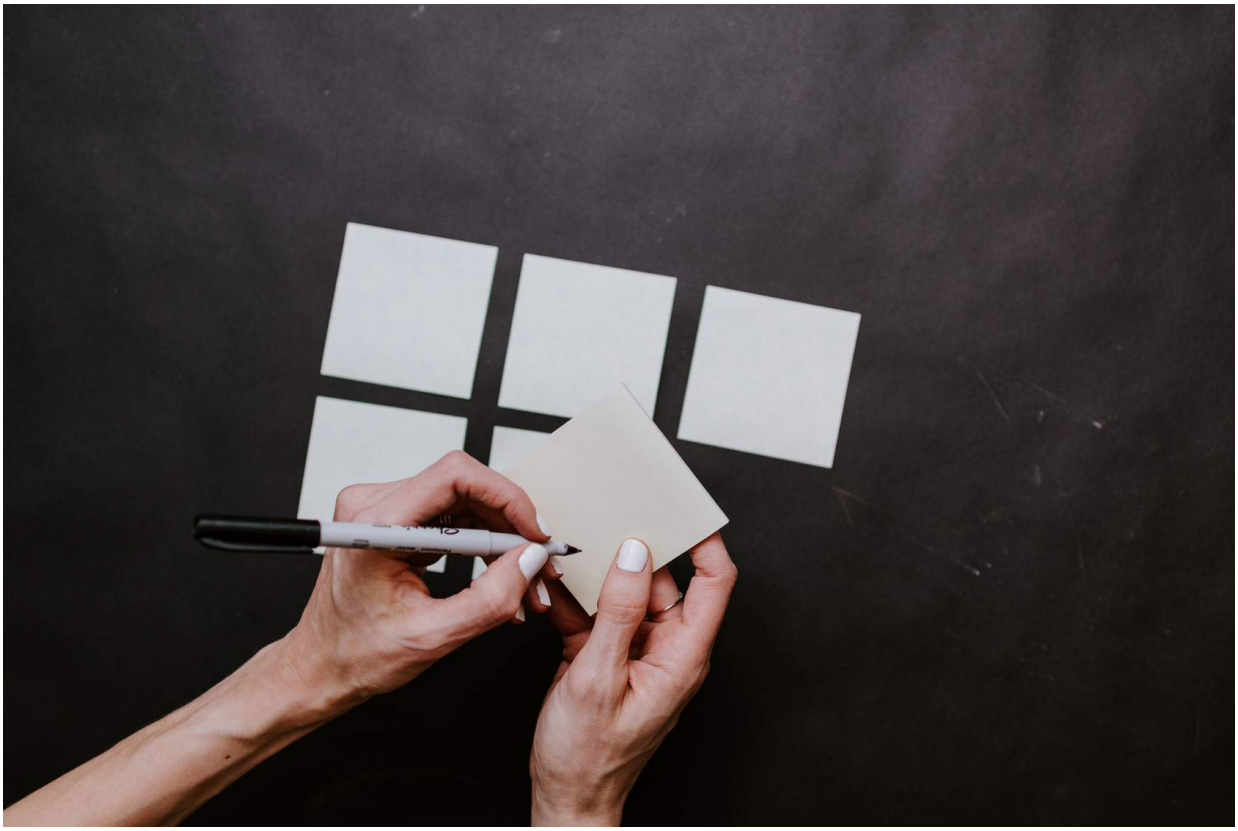
Steps 2 & 3: Define and Organize Tasks

> Once you have defined the project and come to an agreement on scope, cost, time and quality, you are ready to begin planning how you will do the project.

First, list all the tasks involved in completing the project from start to finish.

Then, get all of the tasks into order.

It is helpful to do this on post-it notes or a work breakdown structure template so you can move the tasks around as needed. It's best to approach this exercise three times:



1. **Creative brain:** First, engage in random brainstorming - bouncing ideas and listing everything with no judgement or criticisms.

2. **Logical brain:** Second, organize tasks into categories (this will help you spot anything you missed in initial brainstorm) and create a structured breakdown of the tasks.

3. **Ask other people:** Finally, do some research. Talk to consultants, internal experts, colleagues that have completed similar projects, etc. Look at written records of past projects similar to yours. This exercise will help you spot things you may not have considered and add them to your task list.

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- Next, granulate the tasks so that they are "grippy“. Meaning, what tangible jobs do you need to do weekly to achieve the overall task?
- Include the right level of detail - not too much, not too little.
- If you think a task should be listed as "ongoing" it should set off alarm bells that you don't have enough detail. Conversely, there is no need to micromanage every aspect of the task.

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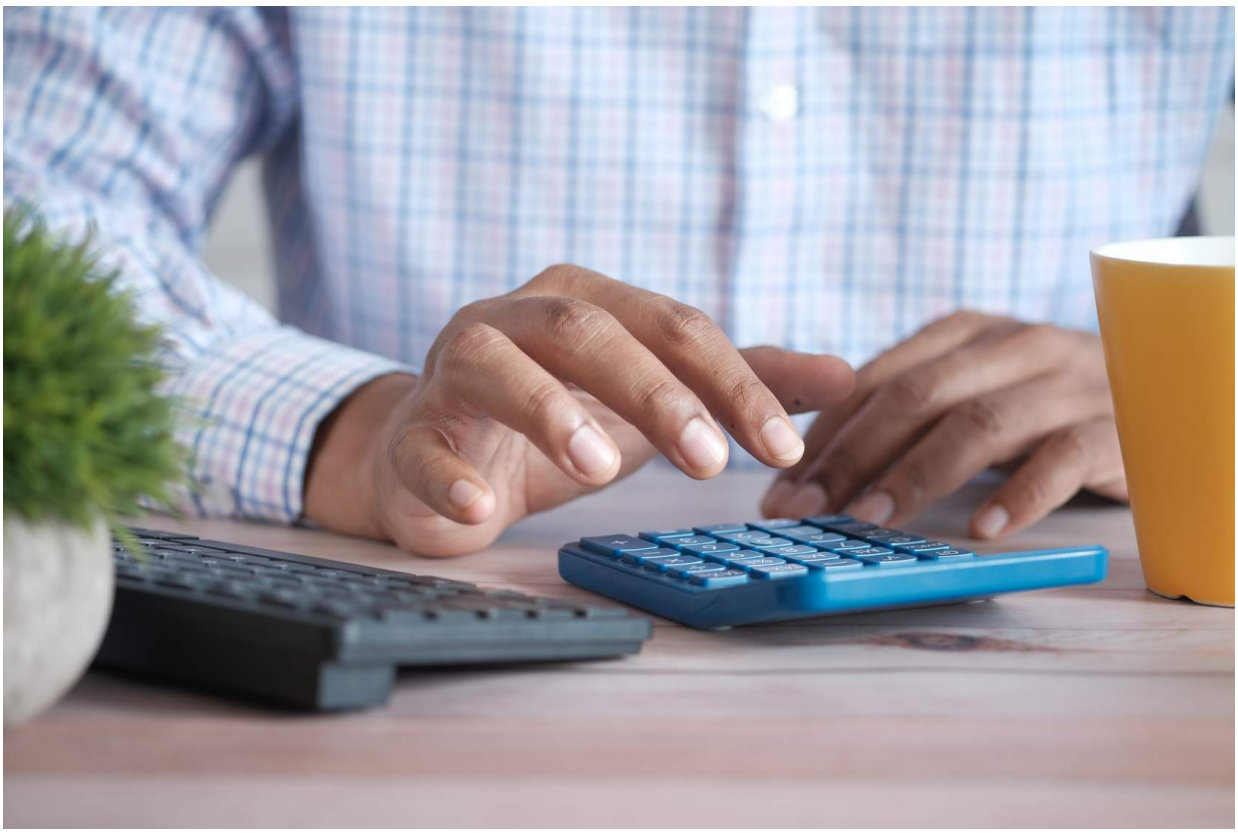

Once you establish the running order of your tasks, estimate the time you think each task will take - usually in days or weeks – as well as the cost for each task.

At this point, just estimate time and cost as if everything were to go perfectly according to plan.

Don't worry! We'll add a safety margin in a future step.

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Critical Path Diagram

When you are comfortable that you have the right tasks in the right order with the right amount of time and money estimated, identify the longest/slowest path through the running order of the tasks.

This is called the **Critical Path Diagram**. Tasks falling along the critical path directly impact your ability to complete the project on time; any delay in these tasks set back the project completion date.

Understanding the **critical path** of the project allows you to prioritize which tasks require a greater focus and gives you an assessment of actual time versus planned time, so you can see where you currently are in your progress.

It also allows you to identify which items are taking longer than expected, which are ahead of schedule, and which jobs are right on track.

The key word here is critical. There may be other tasks that you can organize around the critical path. For example, you may decide to create party favors for your event at the same time you send out event invitations. However, the event can still occur without party favors if you run out of time. The event cannot occur without invitations. Sending out invitations is a critical task.

The critical path answers the question: *What's the least amount of time needed to complete this project?* It answers this question by determining the longest sequence of dependent tasks required for a project's success.

CONTINUE

Scenario

Click the play button below to watch a short video. You must watch the video to move forward in the course.

Complete the content above before moving on.

Steps 4-6: Making it Fit

Now that you have identified the critical path, you'll want to add a safety margin to your plan.

Add up the task times and costs along the critical path for your total averages. Next, calculate the worst case scenario for each of those tasks.

If you add contingency at the **halfway mark** between the average and the worst, you'll be **90%** safe to deliver your project **on time** and **on budget**.

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What If You Need to Shorten the Critical Path?

Aggressive project deadlines may require you to shorten the critical path. In this case, there are two actions you can take to compress your schedule and meet the deadline.

- **Fast-tracking** is when you rearrange tasks so that they're performed parallel to one another instead of sequentially. Try this technique first when you need to compress your project schedule because it doesn't require any additional resources.

- **Crash duration** involves adding more resources to strategic tasks in an attempt to speed them up and minimize the time needed for completion. Analyze costs and schedules to determine where the least amount of resources can boost your project's speed significantly.

Fast-tracking and crash duration are two techniques you can use to shorten the critical path and the duration of your project. Fast-tracking increases a project's risk, while crash duration increases its cost. It's up to you to weigh the pros and cons of each.

It's imperative that you always put the truth into your plan with your time and cost estimates and don't take the contingency back out when crashing the plan.

CONTINUE

Scenario

Click the play button below to watch a short video. You must watch the video to move forward in the course.

Complete the content above before moving on.

Here are some templates you can use to help you with your planning:

- Project Plan
- Budget Plan
- Gantt Chart

CONTINUE

How to Create a Project Plan

Why You Need a Plan

Missed deadlines, hidden costs, and unmet expectations—these are just a few of the many threats that a project manager faces.

It's easy to have a good idea for a project, but it's much more difficult to execute it. Projects are prone to chaos, and the array of people, schedules, tasks, and resources to coordinate can make any project manager's head spin.

So, what's a project manager's best defense? A solid project plan.

In this lesson, you'll learn what a project plan is and the five main sections that comprise a project plan. You'll also learn a four-step process and tips for making your project plan as accurate and effective as possible.

What Is a Project Plan?

A project plan is a formal, approved document that details how a project will be executed and controlled. It breaks down the tasks and activities involved in a project, and it specifies who will complete them, in what sequence, and by when. A project plan defines the requirements for a project's successful completion, and it describes strategies for keeping the project on track.

Here is a list of questions that a project plan answers for the team, executive management, and clients alike:

- What's our goal?
- What are the project deliverables and expectations?
- How do we complete the project?
- Who is responsible for what?
- When are tasks due? When is the project due?
- What's our budget?
- How do we handle problems?
- How do we handle project changes?

Good, Better, Best

A good project plan provides your team with direction and important context. It creates a shared understanding of responsibilities, goals, and deadlines. A great project plan sets realistic expectations. It clarifies project outputs and estimates project costs and resources. Finally, the best project plans are proactive. They predict issues before they happen and provide guidance on how to handle them. They create a plan for communication and receiving feedback.

5 Main Sections of a Project Plan

Five main sections comprise a typical project plan. Some project plans may go into more or less detail depending on the team, management style, and scope of the project. However, these five sections will provide you with a solid foundation. Click on each section below to expand it and learn more about that section.

Project Overview

The first section is a general overview of the project. It includes a brief description of the project and any relevant context such as background information about the project, why a project was started, past initiatives, market opportunities, or other contextual information about the environment in which the project operates.

Project Goals and Deliverables

After the project overview, use the next section to describe the project goals and deliverables. Goals should give team members an understanding of the client's objectives and what defines a project's successful completion. Deliverables are any tangible products or outputs of the project, such as a blog post, product feature, or video. Make project goals and deliverables as specific and measurable as possible.

Implementation and Scheduling

This section creates the bulk of your project plan. It includes the process, strategy, or workflow for completing the project. The implementation and scheduling portion of your project plan should include the following:

- **Define Tasks.** Define what tasks are necessary to achieve the project goals and deliverables. Group tasks into key milestones, or phases, that will make up the project from initiation to execution to closing.
- **Assign Tasks.** Assign the names of individual team members to each task to indicate who owns it and is responsible for its execution and completion.

- **Set Deadlines.** While you need to provide a project completion deadline, you should also assign deadlines to individual tasks, or key project milestones, to help the project stay on track. Short-term deadlines will help you monitor if your team is falling behind on long-term deadlines.
- **Create a Schedule.** Finally, you'll need to organize all of the tasks, responsibilities, and deadlines, into a schedule. The schedule should be visual and easy for team members to quickly see what they're responsible for and when their tasks are due.

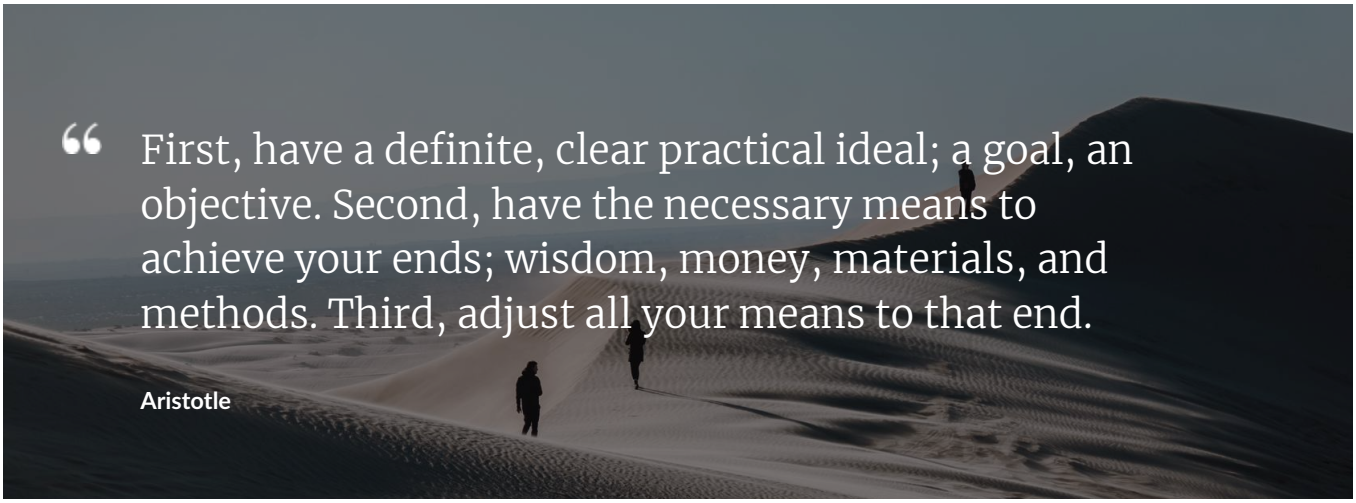
Resource Requirements

Identify the resources you need to complete a project—including time, people, budget, and equipment or technology. What support do you need from which people? What's your deadline and budget? And how will you distribute resources across the project and its phases? Describe where and how you will obtain and distribute necessary project resources.

Risk Management and Communication

This section takes a proactive approach to handling problems and changes to the project. You can break this section down into two subcategories:

- **Risk Management Plan.** Risks are potential issues or threats to the successful completion of the project. Examples of risks include issues with staffing, funding, supplies, or even market volatility. A risk management plan identifies these risks and defines strategies or contingency plans for dealing with them. Documenting risks and defining strategies for handling them beforehand gives the project team and stakeholders clear action steps to take before risks can grow into larger issues.
- **Communication Plan.** Communication plays a critical role in identifying and solving problems right away. A communication plan defines how critical project information will be delivered and at what frequency. For example, it might establish weekly team meetings or check-ins with the client at key project milestones. It gives your project team clear, effective, and open lines of communication for sharing project updates, clarifying goals and priorities, and communicating issues or asking for help. It also sets expectations for giving and receiving feedback from the client or executive management.



What Differentiates a Successful Project Plan?

Project plans fail when objectives and tasks are generic, accountability is centralized, and the team constraints or project risks aren’t incorporated. Project plans need to be specific, well-researched, and proactive. It’s worth the extra time and effort to make your project plan as accurate and effective as possible. Otherwise, the issues in your project plan will only manifest in your project’s execution—and potentially prevent you from achieving your goals.

4 Steps for Developing Your Project Plan

Follow these four steps for developing a more informed project plan.

Step 2

Research and Gather Information

Review the five sections of an effective project plan: project overview, goals and deliverables, implementation and scheduling, resource requirements, and risk management and communication. What information do you need, and who should you consult, for filling in the details of each section confidently and accurately?

Interview the client or executive management to clarify the project's goals, deliverables, key dates, and preferred mode of communication. Review your talent pool and get to know your project team's interests, skill sets, dynamics, and bandwidth. Finally, research if your company has completed similar projects. How did they approach it? What was their strategy and success rate? And what lessons did they learn?

Step 3

Draft an Initial Plan

After you've gathered the necessary information and interviewed the right people, it's time to draft an initial project plan. Again, pay attention to the five sections of an effective project plan. Get specific. Break down every milestone of the project into actionable tasks. Break down tasks until they cannot get any more specific. Walk through each step of your plan and look for gaps or risks that might threaten its success. Focus on drafting a plan that's actionable, results-oriented, and detailed.

Step 4

Get Team Feedback

A project plan is largely for your project team. They're the ones who will follow and execute your plan, so it's a smart idea to get their feedback before finalizing it. Are there any issues or problems your team sees? Are there any scheduling conflicts with your team members' other priorities? Are there any known holidays or vacation plans that you need to account for? And is there anything you're missing from each team members' perspective and area of expertise? Prompt your team with specific questions to gather more meaningful feedback.

Step 5

Formalize the Plan

The final step is to review your team's feedback, make any necessary changes, and formalize your project plan. Review your plan one more time to make sure it makes sense and captures all of the necessary details. Seek official approval or sign-off of your project plan from the client or executive management.

Summary

Altogether, the four steps for developing your project plan is are to research and gather information, draft an initial plan, get team feedback, and formalize your plan.

Plan for Change

No matter how much research and energy you put into developing a thorough project plan, you cannot plan for everything. Change is often inevitable. Project scope, budget, and schedules may shift. Unexpected problems may occur—and that's okay. Don't approach a project plan as a static document. Instead, think of a project plan as a living, breathing thing. Adapt your project plan as you go to account for new information, issues, and updates. Look at your original project plan as a baseline, and reference it before making any major decisions. Communicate any changes to your team, client, and relevant stakeholders. Focus on achieving the best result, not keeping your project plan intact.

What Do You Do?

A key team member calls in sick during a critical time frame of your project's execution. What do you do?

- [ ] Review the original schedule from your project plan to see how the delay may affect deadlines for the rest of the project. Make

any necessary changes to your plan and communicate them to the rest of the team accordingly.

Monitor the project changes. Identify the tasks that fall behind, but otherwise stay focused on keeping the rest of the team on track with the original plan.

Immediately call a team meeting. Communicate the scheduling risks to your team and collectively identify the best alternative for absorbing the tasks among the rest of the team.

SUBMIT

Summary

A project plan communicates how a team will execute a project. This starts with an overview of what the project is and why it's important, followed by a definition of project success, including project goals and deliverables. It then outlines a how-to section that defines the tasks, steps, and milestones involved in implementing the project, as well as a schedule that clarifies task ownership, sequence, and deadlines. A project plan continues with resource requirements. It covers the budget, people, time, and technology necessary to complete the project. And it ends with a plan for managing risk and communicating effectively throughout the project's execution. When developing your project plan, you should always do preliminary research, interview the client or key stakeholders, and gather feedback from your team. These extra steps will help equip you with the necessary knowledge to make your plan more accurate, informed, and effective.

What's missing? When reviewing your project plan, always ask yourself and your team: What's missing? Are there any deliverables that have not been defined? Are there gaps in the plan or tasks missing to complete the project? What resources haven't you accounted for? And what risks haven't you considered?

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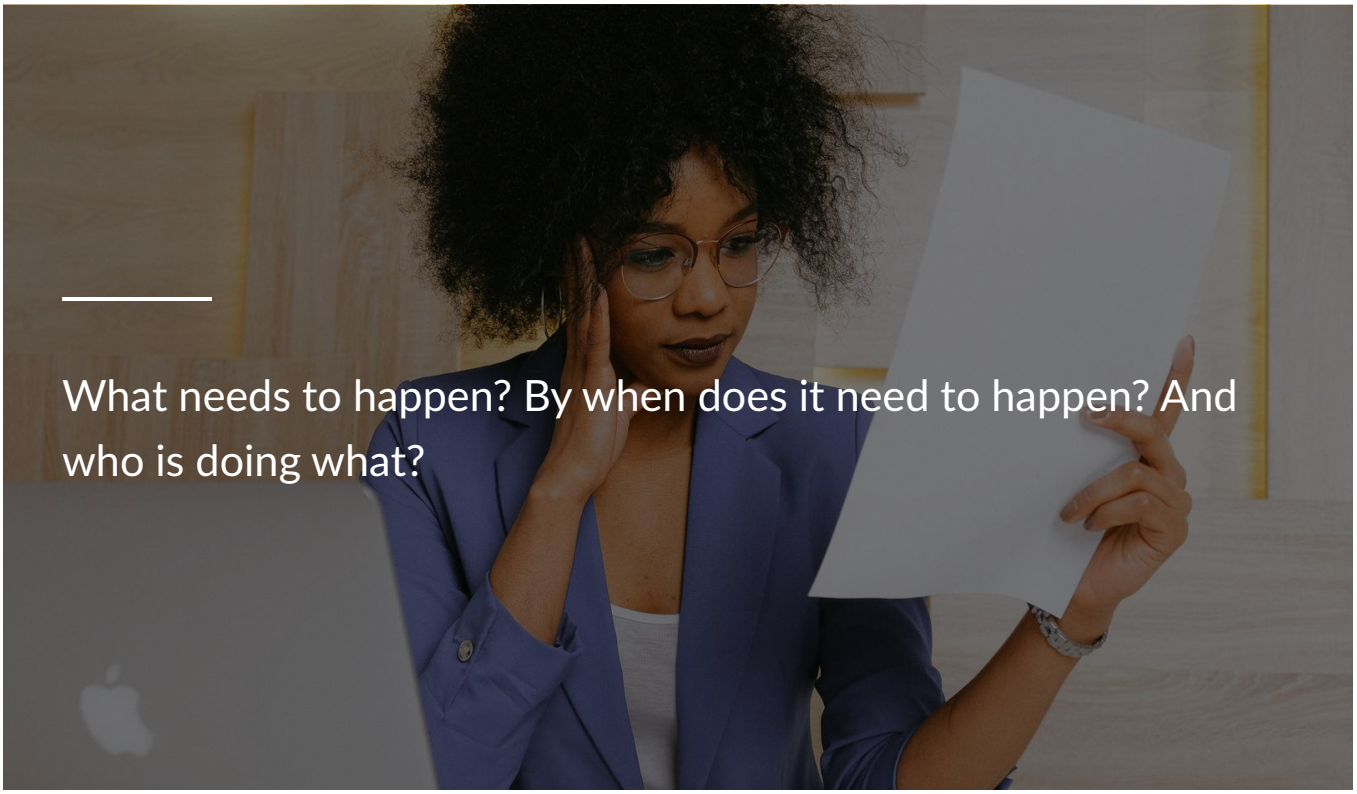
Lesson 8 of 11

Project Scheduling Techniques



Introduction

These three questions are a project manager's mantra while creating a project schedule. The project manager must deconstruct a project into actionable tasks, organize those tasks in an order that makes sense, and assign people and deadlines to them.

When it's finished, the project schedule makes sure that everyone on the team is using the same map and thus moving in the same direction. That's why it's so important that a project schedule is accurate, documented, and accessible to everyone on the team.

In this lesson, you'll learn three different techniques you can use to document your project schedule. While online project management tools are available, budget limitations, personnel, or even internet bandwidth can prevent adoption. That's why this lesson focuses on more basic solutions. You'll explore the benefits and drawbacks of each technique, as well as some best practices for updating your project schedule as you go.

Project Scheduling Basics

There are a few project scheduling basics to review before using any of the three project scheduling techniques. No matter what technique you choose, project scheduling will always require these four steps.

Identify Tasks

The first step in creating any project schedule is to identify all of the tasks or activities necessary to complete the project. For example, replacing a roof involves both removing the old roofing material and installing the new material.

Sequence Tasks

After you have a list of all the action steps to complete a project, you then need to arrange them in order from what needs to happen first, second, and so on. Continuing with the roof replacement example, you'd put the roofing steps in the order that they need to happen, which may look like this: remove the old roofing material, secure and inspect the wood decking, prepare the roofing surface, install new roofing materials, inspect the roof, and clean up the site. Pay special attention to what tasks must be finished for other tasks to begin. Adjust your task sequence accordingly.

Determine Timing

Next, you estimate how long the project will take. You might do this by estimating how long it will take to reach key project milestones. Or, you might review the data on how long it took you to complete similar projects in the past. You might even estimate how long each task will take individually before adding up your task estimation totals. No matter what approach you take, you need to determine the timing of your project. Depending on your overall deadline, you then need to set smaller deadlines for specific tasks or project milestones.

Assign Resources

Finally, assign resources. That means you need to delegate tasks to specific people as well as identify any equipment, materials, or other assets required to complete each task.

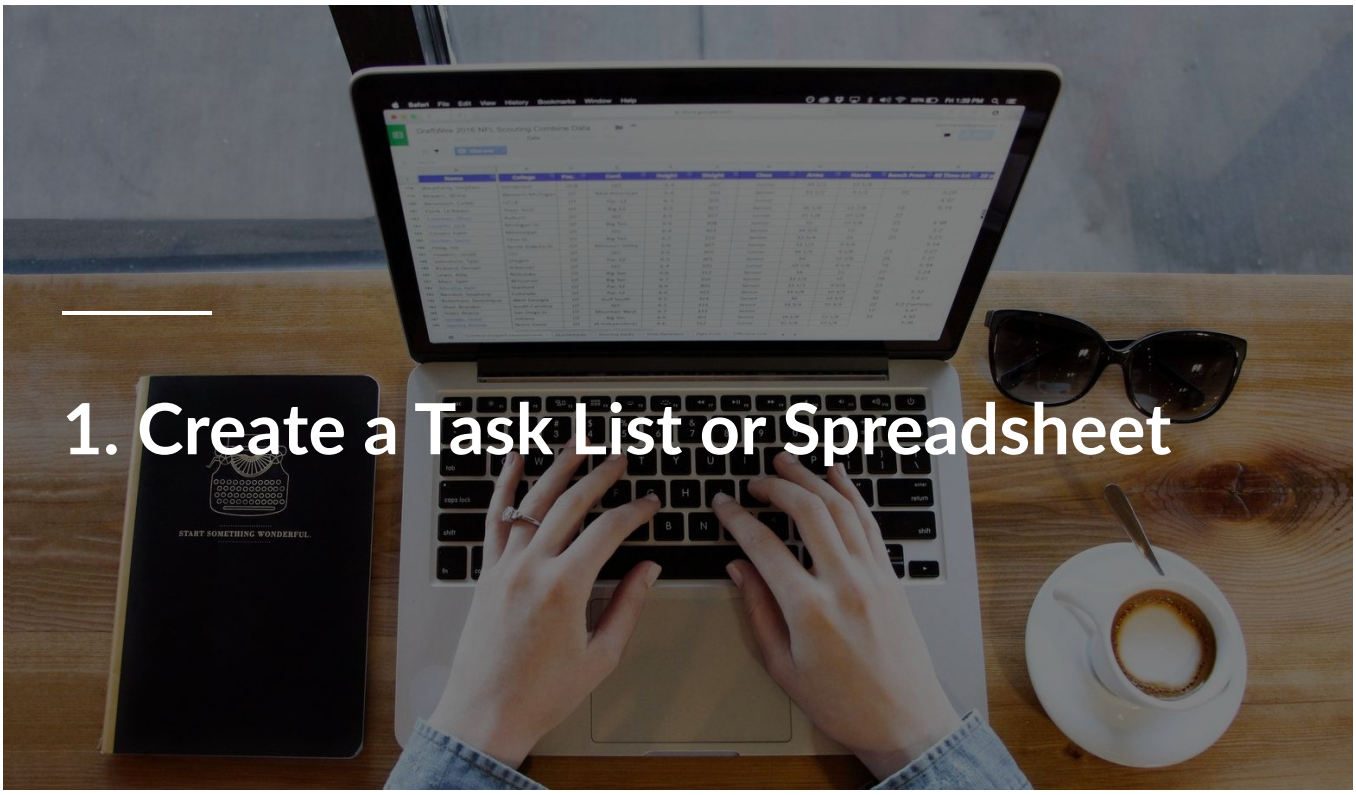
These steps are fundamental to creating a project schedule. You can't use the schedule techniques that follow until you start with the project scheduling basics.

3 Techniques for Project Scheduling

Now that you have the foundation for a strong project schedule, you can move on to learning three techniques for documenting and organizing this information. Each of the following techniques is a different way that you can record and visualize your project schedule for your team. Weigh the pros and cons of each and choose the technique that best fits the nature of your project and team preferences.

Remember: Your project schedule should be easy for your project team to understand and access. Readability and visibility are important for communicating a schedule effectively. Some of these techniques may

seem simple, but they're vital for increasing the readability and visibility of your project schedule.



1. Create a Task List or Spreadsheet

Overview

The first technique is the simplest. List all of your tasks—including due dates and who's responsible—in a word processing program like Microsoft Word, Pages, or Google Docs. Or, organize tasks, along with your timing and resource notes, into a spreadsheet using applications like Microsoft Excel, Numbers, or Google Sheets. If you use a spreadsheet, organize scheduling information into columns such as Task, Owner, Assets Required, Task Start Date, Task Finish Date, Hours for Completion, and Dependencies.

A task list or spreadsheet is easy for you to create, and it's also easy for your team members to read, understand, and quickly find their respective responsibilities and due dates. However, it has limited collaboration functions—especially if you don't use a web-based word processor or spreadsheet application. A task list also won't save and

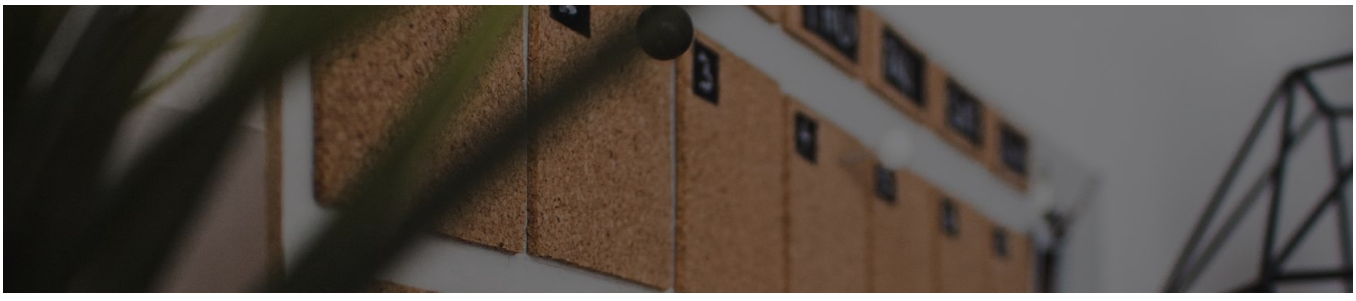
archive different versions of your project schedule for you. That means you must manually duplicate the file, make the necessary changes, and email the new version to your project team every time you update the schedule. Finally, this option isn't helpful for those who prefer a more visual approach to project scheduling.

Advantages:

- Easy to create
- Simple to read and understand
- Likely already have access to the tools to create one

Disadvantages:

- Limited collaboration functions
- Not very visual
- Manually duplicating and updating the schedule is time-consuming and may lead to team confusion or miscommunication



2. Schedule Tasks in a Calendar

Overview

The next technique is also a simple one. Create a new calendar for your project—or even for each team member—and schedule your project tasks on the calendar. There are several different ways to do this. For example, you might still use a spreadsheet application like Microsoft Excel, Numbers, or Google Sheets to make your calendar, send it to team members, and then print it to display somewhere you can see it every day. However, it's more common to use your team's everyday appointment management tools—such as Google Calendar, Microsoft Outlook, or iCloud—so that you can share and sync your project calendar with those tools.

Similar to creating a task list, a web-based calendar option will make it easier to share and make live changes to the calendar. A desktop-based calendar may be time-consuming to make changes and cause confusion if team members use old versions of the calendar. However, a calendar is better for visualizing the timing of a project—it provides a "big picture" view of that timeline. The main disadvantage of using a calendar is that it's more challenging to indicate resource assignments, including who is responsible for each task.

Advantages:

- Simple to create
- Visually displays project timelines and shows the big picture
- Likely already have access to the tools to create one
- Can create calendar notifications or reminders for the team
- Can integrate with your team's everyday calendars, so distribution is easy and instant

Disadvantages:

- Not easy to assign or see who's responsible for each task
- No place to show additional resources needed to complete each task
- May get messy for complicated projects with a lot of tasks that happen simultaneously

3. Make a Gantt Chart

Overview

The third technique involves making a Gantt chart. A Gantt chart is a horizontal bar chart. Tasks are depicted as blocks of time, measured both in the estimated amount of time it will take to complete a task as well as the actual amount of time it took to complete a task.

That means tasks are listed on the y-axis of the chart, while specific dates and the number of days or weeks are listed on the x-axis. The bars on the chart indicate the estimated and actual amount of time each task takes to complete. Note that you can distinguish estimated or actual time by either stacking bars and/or using different colors that represent each.

It's possible to make a Gantt chart using a spreadsheet application like Microsoft Excel, Numbers, or Google Sheets. However, many create Gantt charts using larger, web-based project management systems, or using a software program specifically designed for creating Gantt charts. Depending on what program you use, you may be able to share the link to your Gantt chart with team members directly.

A Gantt chart makes it easy to recognize project delays and adjust the schedule accordingly. It also is highly visual and helps everyone quickly see details about a project's timing and whether or not the project is on track. You also have the option to assign people to tasks using a Gantt chart.

Advantages:

- Easy to see progress
- Highly visual
- Able to assign people to tasks
- Tracks estimated versus actual time to complete tasks

- Easy to update

Disadvantages:

- Can be complex or time-consuming to create
- Difficult to see on one sheet of paper
- Gantt software or project management systems may cost extra

Which Technique Do I Choose?

While you may choose one of these techniques to record and communicate your project schedule, you might also use several. That may take some extra time and effort on your end, but it's up to you to decide if the extra work is worth it. Go with the option or options that work best for you and your team. If you have better results using a Gantt chart, then use a Gantt chart. Or if you find that your team needs both a calendar and a task list, then do that. Results matter most.

What Do I Do if My Schedule's Off-Track?

While a project schedule is meant to help you avoid task delays and setbacks, they're sometimes inevitable. If your schedule gets off-track, you don't need to panic, but you do need to act quickly. There are a few steps that you should always take, and two corrective actions you can consider to compress your project schedule.

Review Your Project Schedule

First, start by reviewing your task list, calendar, or Gantt chart. You need to take a look at the damage, or how one task will impact the others. Pay close attention to task dependencies (such as if succeeding tasks can't start until the delayed task is finished), as well as task start and end dates, and your overall project deadline. Determine if the issue is significant enough to impact your greater timeline or resource availability, such as access to equipment or key team members. Is it really a problem? Or is there some wiggle room?

Take Corrective Action

If you determine that the delay is a significant threat, then you need to take corrective action. There are two options you can consider.

- **Fast-tracking.** Fast-tracking involves adjusting the start or end dates of other project tasks. Specifically, you need to look for any tasks that can be done at the same time—or partially at the same time—instead of one after the other. For example, imagine that you were planning to have a writer draft a piece of content first, then have the editor take a look at it after it was

finished. Using fast-tracking, you might have the editor edit the first half of the piece while the writer works to complete the second half.

- **Crashing.** If you can't fast-track a project, then you can look into crashing. When crashing your schedule, you add more resources to complete critical tasks—you don't change their start or end dates. For example, if you originally had one team member developing a new online course, you might assign an extra team member to help them get the course done faster.

Make and Communicate Project Updates

Finally, you should always make updates to the project schedule—no matter if it's a task list, calendar, or Gantt chart. If your schedule is desktop-based, then duplicate the old schedule and save and distribute the new version to your team. If your schedule is web-based, make the updates in your schedule and make sure to communicate the changes to your team.

What Do You Do?

You're creating a project schedule for your team. What's the first thing you do?

- ◯ Create a task list.
- ◯ Create a calendar.

- ○ Create a Gantt chart.
- ○ Assess your project and team preferences, then choose your project scheduling technique.
- ○ Identify your project tasks.

SUBMIT

Summary

Creating a task list, calendar, or Gantt chart are the three main scheduling techniques for documenting your project schedule and distributing it to your team. Each technique has its advantages and disadvantages. For example, creating a task list or spreadsheet is simple for you and easy for your project team to understand and read. However, a task list won't help your team visualize the timing of a project. A project calendar is a logical choice for visualizing when tasks need to happen, and you can often sync project calendars to the calendars your team is already using. However, a calendar makes it more difficult to see who's responsible for tasks and what other resources may be required. Finally, a Gantt chart is the best for visualizing tasks, timing, and resources. You can see both the estimated and actual amount of time it takes to complete tasks on a horizontal bar graph. However, making Gantt charts can be more time-consuming, complicated, and costly. You can choose the technique that works best for your team or even use multiple techniques. If you see results, that's all that matters.

Review and update your project schedule as often as possible. The best way to keep your project on track is to closely monitor a project's progress and keep your project schedule updated. Check in with project team members often and address scheduling issues immediately.

CONTINUE

Steps 7-8 Resources and Risks

Calculate Resource Requirements

Next, use the Gantt chart to see where your tasks overlap and how many people you need.

You may discover that you have floating tasks that can be moved to fit your resources or it may show you that you need another resource and when.

Assess Risk

Next up, think about what might go wrong. Assess your risks and detail out an action plan to address them. Determine the likelihood and seriousness of your risks and determine what can be done to reduce them.

Here are some tools you can use to help you to assess risk:

- Risk Assessment Form
- Basic Risk Assessment Template

CONTINUE

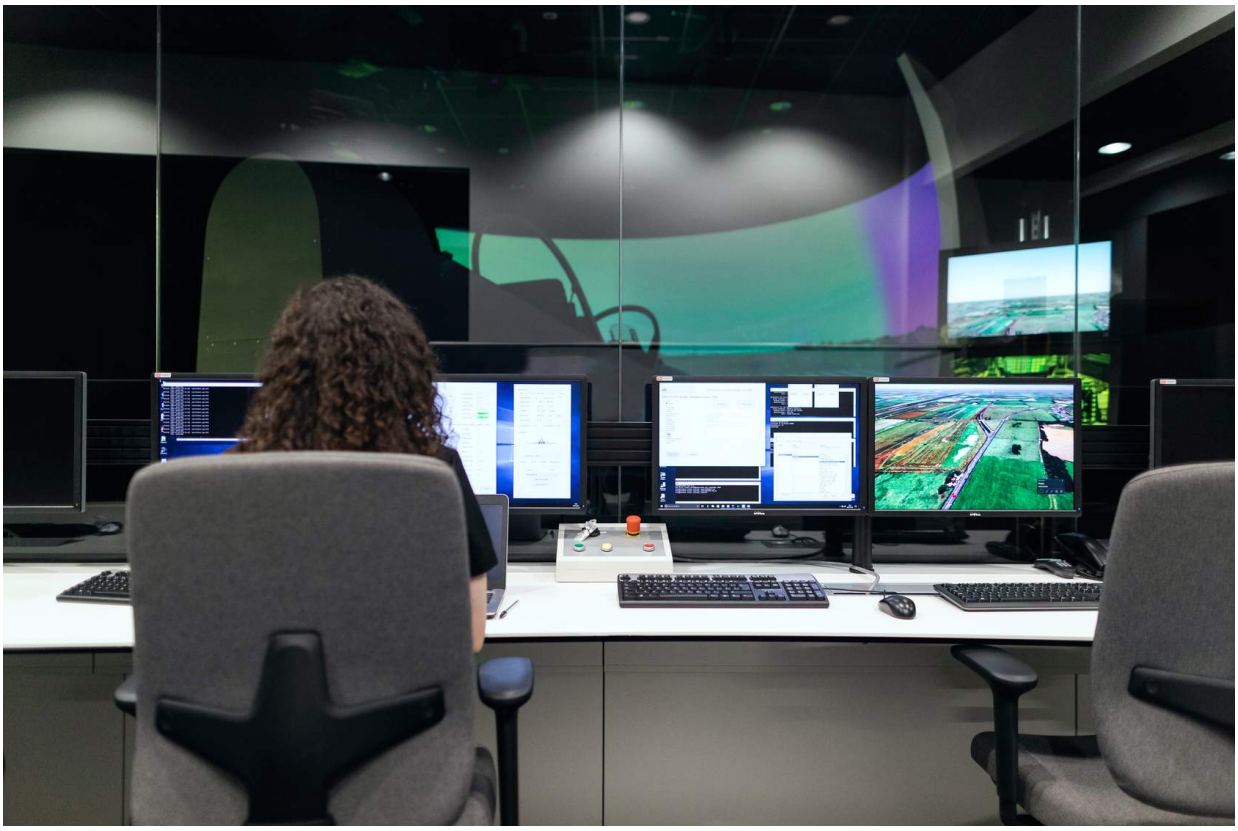
Scenario

Click the play button below to watch a short video. You must watch the video to move forward in the course.

Complete the content above before moving on.

Steps 9-12 Doing the Work

Now you are finally ready to do the actual work!



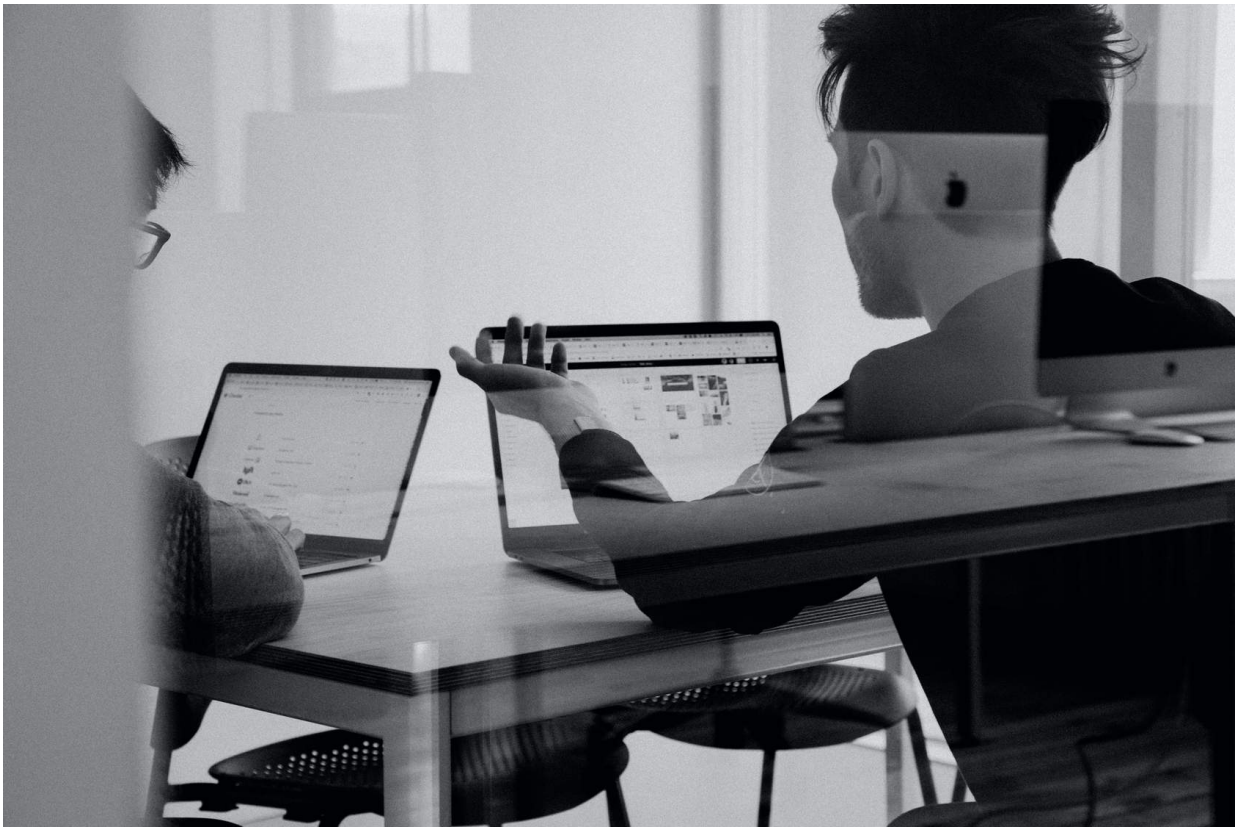
Monitor Project Progress and Cost

Update the Gantt chart on a daily basis and use color-coding to keep track of which tasks have been completed, running late, over budget, etc.

This helps you monitor the progress and keep on top of the project before the project gets off course.

Meet with your project team often to communicate and track updates.

CONTINUE



Project Review

Finally, when the project is over, perform a thorough project review.

Its purpose is to evaluate whether project objectives were met, to determine how effectively the project was run, to learn lessons for the future, and to ensure that the organization gets the greatest possible benefit from the project.

Why is it important to review the project?

Reviews provide an independent view of status and of how the project is performing against “best practice”, which

will help the project manager to identify any gaps in their own understanding.

CONTINUE

Scenario

Click the play button below to watch a short video. You must watch the video to move forward in the course.

Complete the content above before moving on.

Conclusion

Key Take-Aways

- Projects are goal-oriented, unique, and temporary
- Get clarity on the scope, time, budget and key players before you start
- Identify the Critical Path to help you accurately estimate time and cost
- Never take out safety margins when crashing: under-promise and over-deliver
- Project review will help you to identify knowledge gaps and improve future projects

CONTINUE

Teva Project Management Tools

Teva has several internal project management tools which can be requested through IT. Please note that some may have a cost to your business unit; talk to your manager about

what tools would be most appropriate for your department.

- **Microsoft Project** - a project management software that's used to create schedules, project plans, manage resources and keep track of time. It has features such as Gantt charts, kanban boards (A kanban board is an agile project management tool designed to help visualize work, limit work-in-progress, and maximize efficiency). and project calendars for project management professionals.
- **Asana** - a web and mobile work management platform designed to help teams organize, track, and manage their work.
- **Jira** - a proprietary issue tracking product that allows bug tracking and agile project management.
- **Planisware -** a software solution for project portfolio management. Check out Teva's Global PLM Community for more information.
- **Saleforce** - provides customer relationship management software and applications focused on sales, customer service, marketing automation, analytics, and application development. Some of the available applications inside salesforce can help you manage timelines and budget (Opex and Capex)

CONTINUE

Want More?

The Project Management Professional (PMP)® is the world's leading project management certification available through the Project Management Institute. A certification can help you develop the practical knowledge, insights and professional expertise to meet increasingly complex project demands.

If you are interested in certification but don't feel ready, you can also explore the Linked-In Learning prep course available on Studium: Cert Prep: PMI Agile Certified Practitioner (PMI-ACP)® LINKEDINLEARNING_42618

And don't forget to visit the Project Management section of the Learn.Grow.Inspire Sharepoint to explore the resources and tools we've reviewed in this presentation and more!

CONTINUE

Contacts (names subject to change)

Training Team

For technical questions surrounding eLearning content

CONTACT TRAINING

Congratulations!

You have completed the course. Click the **X** in the upper right-hand corner of your browser window to exit.