CARAT
California Resources and Training®

PROJECT MANAGEMENT
Application and Benefit

FACILITATOR'S GUIDE FOR CLASSROOM & WEB – BASED TRAINING

PROJECT MANAGEMENT
Application and Benefit

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FACILITATOR'S GUIDE FOR CLASSROOM & WEB – BASED TRAINING

This published material was prepared by CARAT under award number 06-43-B10589-3285485 from National Telecommunications and Information Administration (NTIA) U.S. Dept. of Commerce. The statements, findings, conclusions, and recommendations are those of the author(s) and do not necessarily reflect the views of the NTIA or the U.S. Dept. of Commerce.

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- This program introduces the basic concepts of project management and the benefits of utilizing Project Management software tools.

AUDIENCE

- Small Business Owners

FORMAT

- The course is provided in 2 separate formats:
  - 1. Two and one half hour webinar training
  - 2. Four-hour classroom training

COURSE OBJECTIVE

- Introduce the basic concept and elements of project management
- Relate these concept and elements to the operation of a small business
- Show the value of project management best practices in delivering quality product and services
- Introduce project management software as tools that help to improve operational efficiency
- Show a range of tools that fit from the simple to the more complex needs of an organization
- Identify the infrastructure requirements to support these products
- Take the participants through the stages of assessing their needs for project management software and identifying the next steps in the decision process

TOPIC	TIME
Introduction, Welcome, Course Overview	20
What is Project Management	30
Project Management for Small Business Owner	30
Finding the Right Software	30
BREAK TIME	20
Project Management Software	45
Next Steps	35
Q & A	30
TRAINING HOURS TOTAL	**4.0**

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FACILITATOR'S GUIDE I CLASSROOM TRAINING
2011 VERSION

= Slides

= Charts

= Participant Workbook

1. Create a Welcome Chart:

    a. On the chart – “Welcome to CARAT/CETF Project Management Workshop”

    b. Facilitator’s Name – First and Last name

2. Have slide #1 on projector/projected.

3. Pass out Participant’s Workbook and Tent/Name cards:

4. Create Conditions for Success Chart: (Leave enough space for participant’s additions and thoughts.)

    a. We are all here to learn

    b. Questions are welcome

    c. Listen to understand

    d. Use “I” statements

    e. Be respectful in words and behaviors

    f. Turn all electronic devices to silent mode or off

Part IA – Transition

As students arrive:

- Meet and greet participants as they come in
- Encourage participants to get to know each other and network
- Promote sitting up front or close to the front
- Ask participants to put their names on the tent cards

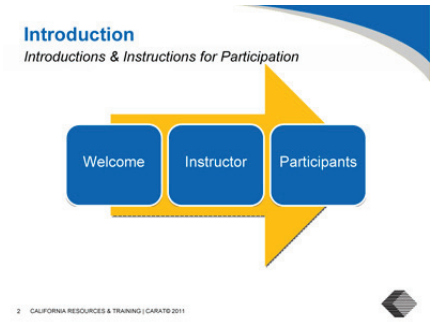
Housekeeping:

- Restrooms (Men, Women)
- Vending Machines, Eateries
- Emergency Procedures (Earthquake, Fire, Evacuation)
- Timeframe for class (Classroom 4 HOURS)

SLIDE 2

Facilitator Welcome:

- Introduce Yourself
- Name (First and Last)
- Experience
- Brief Overview of Program



Participant Introductions:

Have participants provide:

- Name
- Business Name
- Industry/What Business Does
- How many years in business?

SLIDE 3

Course Overview

- The knowledge and skills of project management can be of great value to a small business
- It is a discipline that can be learned and applied at any level in an organization
- There are a number of software tools that allow you to effectively manage your projects and deliveries.
- This course will help the participant to identify potential project management tools that will be a good fit for their specific business processes and practices.

SLIDE 4

What is Project Management

- Let's start by understanding what is a "Project"

SLIDE 5

Delivery

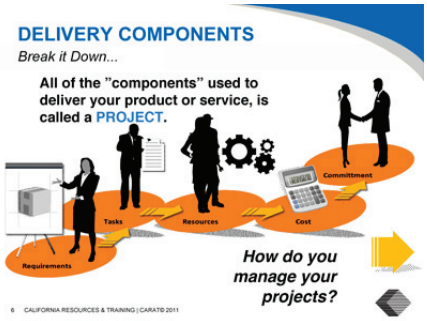
- Engage the Participants and ask them to break down the steps it takes to deliver their product or service
- Note their responses *
- Map their responses to the next slide

**Classroom – you can jot their responses on a whiteboard*

SLIDE 6

Delivery Components

- Gather Requirements – with product think of size, amount, color, etc. With services, think of specifications, deliverables, etc.
- Determine the Tasks or Activities that will be required for fulfillment or "Delivery"
- Resources (What do you need, who do you need)
- Cost (what will it cost you, what will you charge the customer)
- Commitment (Dates, including delivery date or closing date)
- All the activities and steps that are used to deliver your product or service is called a "project"
- Ask the participants how they manage these steps and activities?



SLIDE 7

Project Management Institute (PMI)

- There are formal standards for the practice of project management as defined by PMI.
- For the small business owner, it is often the practice of “common sense” and “expediency”

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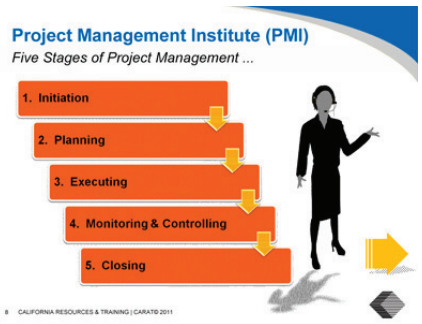

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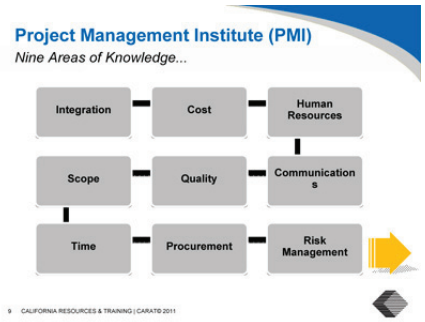
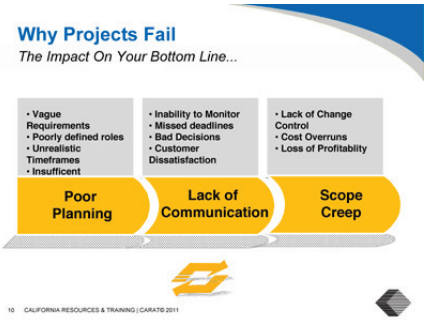


SLIDE 10

Why Projects Fail

- These reasons apply to both service oriented and product oriented businesses.
- How does poor planning impact a business that sells widgets? Or provide services?
- How does a lack of communication impact a business that sells widgets? Or provide services?
- Poor planning plus lack of communication leads to scope creep
- What is the impact of scope creep on a businesses' bottom line?
- This often leads to the syndrome of "my client hates me and I hate my client"



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The Seven C's of Project Success

- Clearly defined Requirements including objectives and goals (statement of work, deliverables, project scope)
- Checkpoints (milestones)
- Controls (status management, flags, change controls and reports)
- Competency (the right person for the job)
- Communication (People are more willing to work with changes, delays and issues if they are kept in the loop)
- Collaboration (issues and problems can be flagged early on and solutions can happen much more quickly if there is collaboration)
- Close the Project (for service oriented businesses, closing the project can be the most difficult step, for product oriented business, delivery may not be the closing step)

SLIDE 12

Project Management for the Small Business Owner

- Now that we know something about project management – how do we apply it as a small business owner?

SLIDE 13

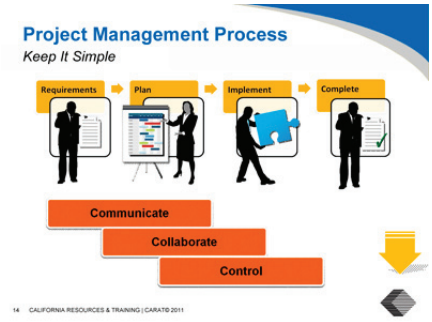
Project Management Skills

- The skill sets are applicable to any business, no matter the product they sell or the service they provide
- Small Business Owners have to know how to multi-task – so these skills will help in the managing of multiple tasks
- Employees in a small business often need to be the jack of all trades. Therefore hiring people who are organized, task driven and goal oriented will help your business.
- Internal Projects are often back burner projects, necessary to the growth of the business, but often placed on the "back burner" because of the External Projects.
- If your "projects" are delivered with project management best practices, you will leave your customers with the perception that you are a "big" business, rather than a small business.

SLIDE 14

Project Management Process

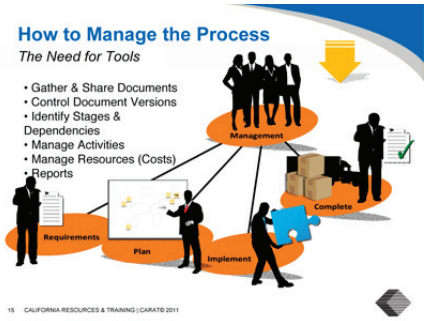
- As a small business owner, it is important to keep the process simple so it's easy to control
- Too many steps, procedures and processes make it more difficult to manage
- If there is communication and collaboration between the team members and customer, then it easier to control the project



SLIDE 15

How to Manage the Process?

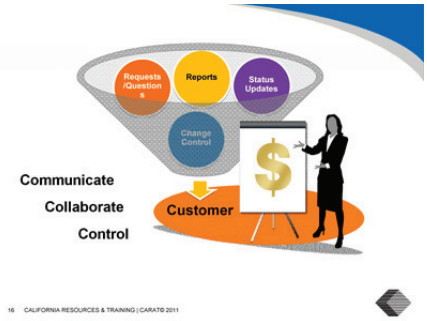
- Review this slide from the perspective of the delivery team.
- Look at each step, engage the participant and determine what needs to happen at each step to ensure project success.
- Emphasize steps like gathering and sharing documents and the issue with versioning control.
- When you identify the steps and dependencies, how do you share the status of each step and the impact of delays or issues when the activities of a dependency are not completed?
- Ask the participants how they currently control resources and costs in their businesses.
- How are reports generated and distributed within your organization today.



SLIDE 16

How to Manage the Process? (continued)

- Review this slide from the perspective of your customer.
- How often do you update the customer on the status of their engagement?
- How do they get their questions or requests answered and how is that shared with the delivery team?
- Is it necessary to send reports to the customer? Do you have a need for software that will help you with the activities of delivering a project?



SLIDE 17

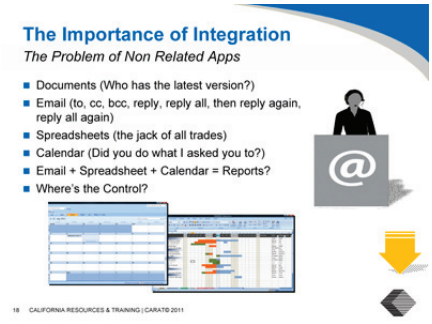
Finding the Right Project Management Software

- It is important to find the right "fit"
- Too many businesses either purchase something that is too limited or they purchase something that is too complicated for their skill set and needs.
- So how does one determine what is the right tool?

SLIDE 18

The Importance of Integration

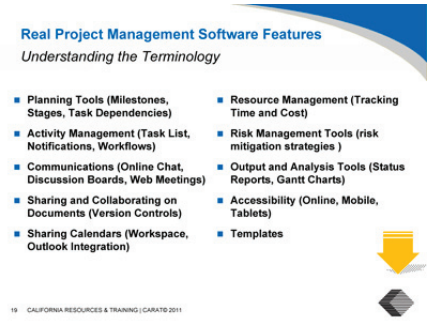
- For many business owners, the tendency is to "make do" with whatever may already be installed on their computers. The software tends to be non-related and it's hard for the user to see and make connections between the data, hence making it hard to get "information".
- Discuss the issue of version control.
- Typically, we tend to rely on emails as our way of communicating and collaborating. How do you manage all the emails sent and the replies on a specific project? (Do you have a project folder under your inbox? – How about other people within the organization? What happens if they leave the company?)
- Spreadsheets can do everything – but do you want them to run your business?
- How do you know when an activity assigned to someone else has been completed?
- These tools don't relate to each other, so creating a report with information from these tools is a manual process.



SLIDE 19

Real Project Management Features

- Planning tools help you define the project schedule, understand the critical path for a project, and assess and allocate staff resources.
- Activity Management – the ability to define tasks, assign it, create deadlines and know when it is complete. This should be the most important feature of the software
- Reports are important. They provide a form of control and is a good way to assess your current status an d detect any potential issues. Gantt Charts are considered a standard tool among project managers, but in truth, may find it difficult to maintain and for the less experience user, difficult to read.
- Always consider how you can access the information from this software. If it is not easy to get to, then you won't use it.
- Templates make setting up the project quick and easy.



SLIDE 20

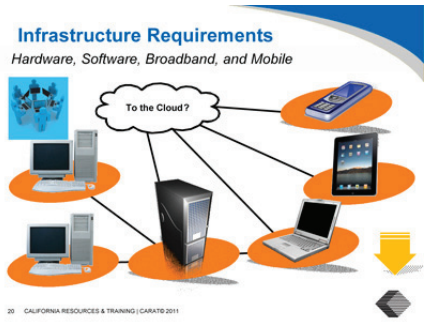
Accessiblity Requirements

- What do you need to consider in terms of accessing the software for yourself, other team members, and your customer.
- This is a very important consideration when selecting a software
- If the components of a software is easily accessible and is easy to use for the most inexperienced member of the team, then the better chance of data being collected and updated on a regular basis.

SLIDE 21

Infrastructure Requirements

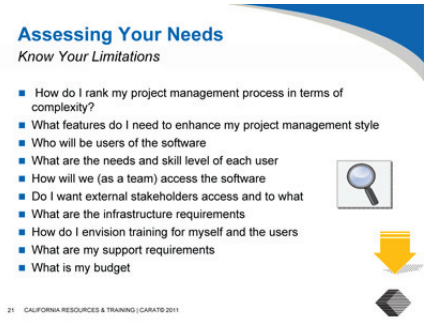
- In order to effectively use project management software, you must have the infrastructure required for your option.
- Depending on the type of software, you may need to have an internal infrastructure or at the very least access to the internet.



SLIDE 22

Assessing Your Needs

- It is important to access your requirements even before you start looking at what is available
- You can refine your requirements as you start to see what is available
- You will be collecting and storing important data so it will be important to know how your data will be protected.
- When assessing costs, include the cost of additional hardware and software costs.



SLIDE 23

Project Management Software

- There are many offerings for project management software. There are some tools that concentrate on one particular functionality, other tools may encompass a bit of many functions, or there are the tools that are all encompassing.
- The options that are presented are ones that we have ranked as simple and familiar, medium level with more functionality, higher level with even more funtionality, and the granddaddy of Project Management Software.
- The one common factor among these particular software is that there is a free trial version available and the pricing is not a hidden secret. It is important to note that you should only consider software you can test out before purchasing the software.

SLIDE 24

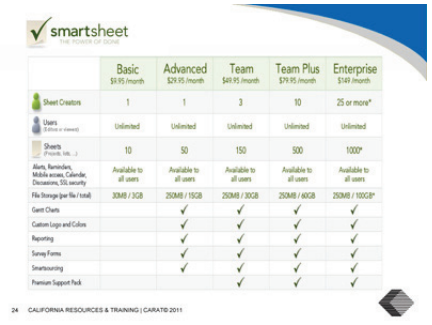
SmartSheet

- Smartsheet is simple and familiar because it's data entry format is very much like a spreadsheet.
- If you are already a user of Google apps, then this product has a seamless integration with other goggle apps.
- The disadvantage is that is not feature rich for projects that require a higher level of complexity.

SLIDE 25

SmartSheet Pricing

- Review the pricing module.
- Use this as an example of how different vendors price by users versus the number of projects you can create.
- Some vendors breakdown their pricing levels by feature availability



SLIDE 26

Central Desktop

- This is a mid range tool that allows for more functionality.
- This online app allows you to sync with your Outlook Calendar.
- There is a free basic version available.

SLIDE 27

Clarizen

- This offers more functionality than Central Desktop.
- One of the best features is the ability to have email only users who can update status through email without having to log into the application.
- It also offers a tool that sends out reports to non users as well.
- It is more complex than the other tools so far, but still considered simple enough for non project management level users.

SLIDE 28

Microsoft Project

- Microsoft Project is considered the grandfather of the project management tools because it's been around a long time.
- Many Project Managers are trained in the use of this tool and many non project manager users find it difficult to use.
- Larger organizations use this tool in an environment that supports infrastructure that includes Project Server..

PART VII – Next Steps [35 minutes]

SLIDE 29

Next Steps

Take a Test Drive

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SLIDE 30

Software Demo

Demonstration of an Online App

Presenter will now switch to an Online App

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SLIDE 31

Moving Forward

Next STEPS

Evaluate Your Options

- Take advantage of the free trial versions, webinars, product guides, review

One Size doesn't fit all

- As you evaluate your options, think about the tools in terms of your own business needs. Find a good fit.

Don't Get Tech Happy

- Be realistic and practical, know that as a small business owner, simple and easy is better than nothing at all

Cost

- Technology is not a one time purchase. Be prepared to look at the cost as a long-term investment. Think of the value in terms of what it will do for your business.

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SLIDE 32

More Information

List of Resources

- For more information on the discipline of project management visit http://www.pmi.org
- There is a wide variety of Project Management Software available. You can start by reviewing these products:

Smart Sheet http://www.smartsheet.com/	**Microsoft Project (Windows based product)** http://www.microsoft.com/project
Clarizen http://www.clarizen.com/	**OmniPlan (MAC based product)** http://www.omnigroup.com/products/omniplan
Central Desktop http://www.centraldesktop.com	**BaseCamp** http://basecamphq.com/
Manymoon (casual and free) https://www.manymoon.com	**GoPlan** http://goplanapp.com/home/plans

- Q&A

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= Slides

1. Arrive 30 minutes before training, check and ensure;
    a. Internet connection is working
    b. You're familiar with all of the controls
    c. Volume is at appropriate level

2. Have slide #1 showing and projected.

3. You have all web – training information (links, call – in, workbook)
    a.Participants have downloaded participant workbook.

Housekeeping:

- Timeframe for class (Classroom 2.5 HOURS)

SLIDE 1

Facilitator Welcome:

- Introduce Yourself
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SLIDE 2

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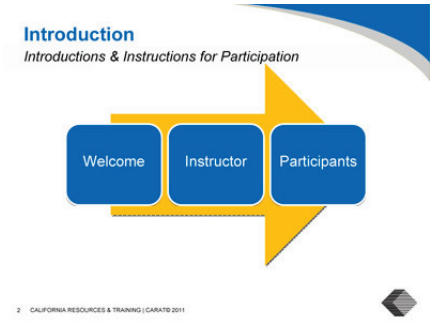

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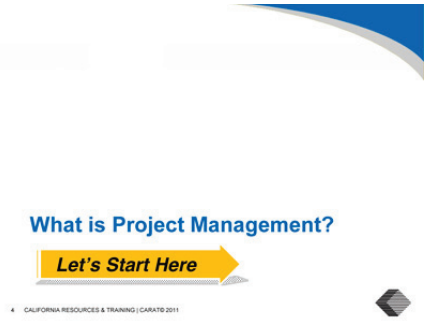
What is Project Management

- Let's start by understanding what is a "Project".



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Delivery

- Have a discussion with the Participants and ask them to break down the steps it takes to deliver their product or service.

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Delivery Components

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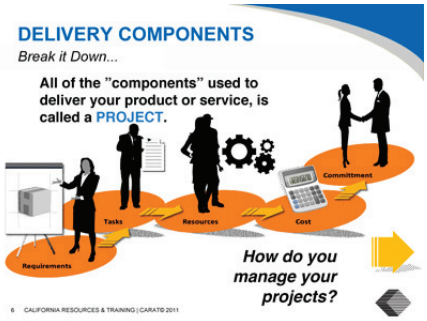

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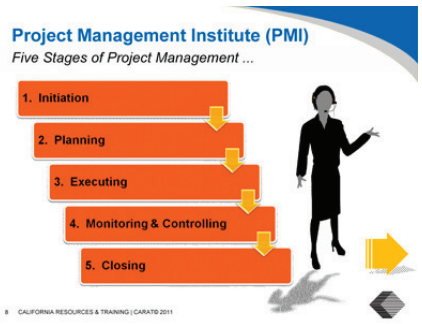

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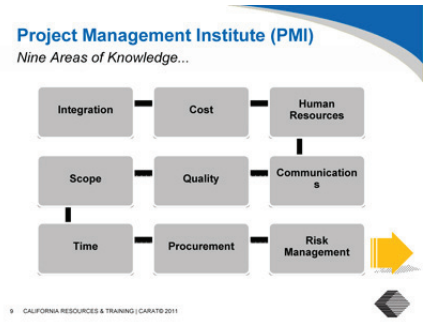

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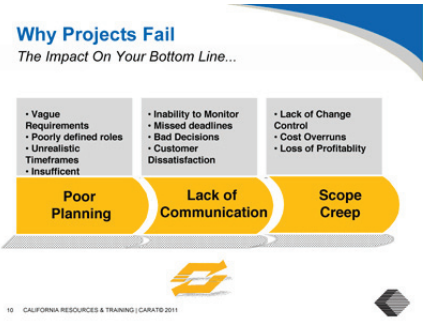

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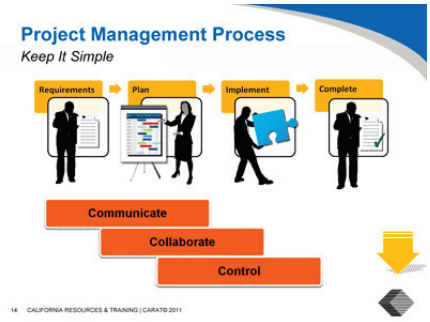
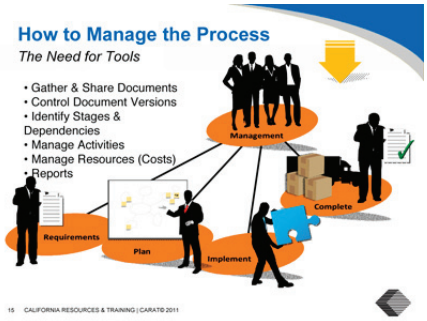
- Too many steps, procedures and processes make it more difficult to manage.
- If there is communication and collaboration between the team members and customer, then it easier to control the project.



SLIDE 15

How to Manage the Process?

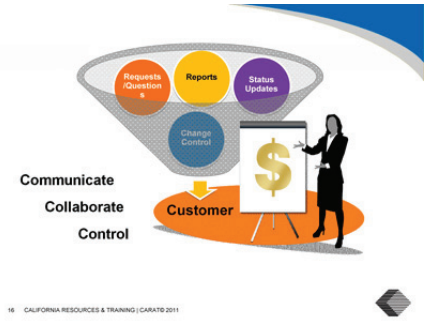
- Review this slide from the perspective of the delivery team.
- Look at each step, engage the participant and determine what needs to happen at each step to ensure project success.
- Emphasize steps like gathering and sharing documents and the issue with versioning control.
- When you identify the steps and dependencies, how do you share the status of each step and the impact of delays or issues when the activities of a dependency are not completed?
- Ask the participants how they currently control resources and costs in their businesses.
- How are reports generated and distributed within your organization today.



SLIDE 16

How to Manage the Process? (continued)

- Review this slide from the perspective of your customer.
- How often do you update the customer on the status of their engagement?
- How do they get their questions or requests answered and how is that shared with the delivery team?
- Is it necessary to send reports to the customer? Do you have a need for software that will help you with the activities of delivering a project?



SLIDE 17

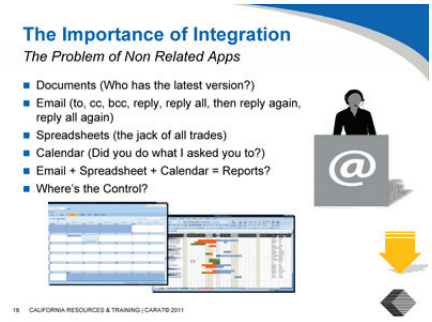
Finding the Right Project Management Software

- It is important to find the right "fit"
- Too many businesses either purchase something that is too limited or they purchase something that is too complicated for their skill set and needs.
- So how does one determine what is the right tool?

SLIDE 18

The Importance of Integration

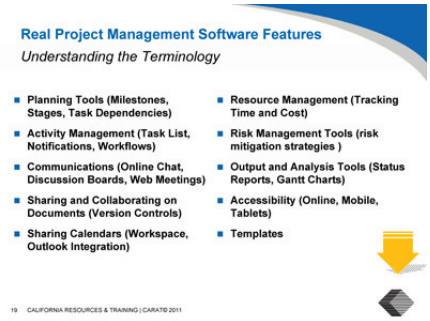
- For many business owners, the tendency is to "make do" with whatever may already be installed on their computers. The software tends to be non-related and it's hard for the user to see and make connections between the data, hence making it hard to get "information".
- Discuss the issue of version control.
- Typically, we tend to rely on emails as our way of communicating and collaborating. How do you manage all the emails sent and the replies on a specific project? (Do you have a project folder under your inbox? – How about other people within the organization? What happens if they leave the company?)
- Spreadsheets can do everything – but do you want them to run your business?
- How do you know when an activity assigned to someone else has been completed?
- These tools don't relate to each other, so creating a report with information from these tools is a manual process.



SLIDE 19

Real Project Management Features

- Planning tools help you define the project schedule, understand the critical path for a project, and assess and allocate staff resources.
- Activity Management – the ability to define tasks, assign it, create deadlines and know when it is complete. This should be the most important feature of the software
- Reports are important. They provide a form of control and is a good way to assess your current status an d detect any potential issues. Gantt Charts are considered a standard tool among project managers, but in truth, may find it difficult to maintain and for the less experience user, difficult to read.
- Always consider how you can access the information from this software. If it is not easy to get to, then you won't use it.
- Templates make setting up the project quick and easy.



SLIDE 20

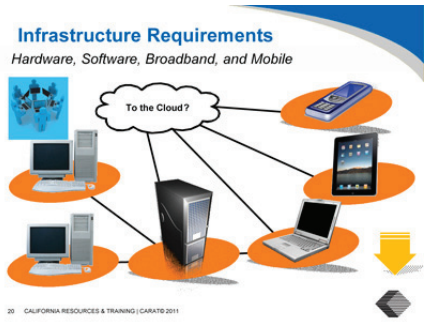
Accessiblity Requirements

- What do you need to consider in terms of accessing the software for yourself, other team members, and your customer.
- This is a very important consideration when selecting a software
- If the components of a software is easily accessible and is easy to use for the most inexperienced member of the team, then the better chance of data being collected and updated on a regular basis.

SLIDE 21

Infrastructure Requirements

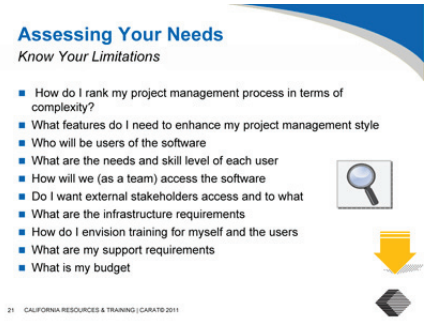
- In order to effectively use project management software, you must have the infrastructure required for your option.
- Depending on the type of software, you may need to have an internal infrastructure or at the very least access to the internet.



SLIDE 22

Assessing Your Needs

- It is important to access your requirements even before you start looking at what is available
- You can refine your requirements as you start to see what is available
- You will be collecting and storing important data so it will be important to know how your data will be protected.
- When assessing costs, include the cost of additional hardware and software costs.



SLIDE 23

Project Management Software

- There are many offerings for project management software. There are some tools that concentrate on one particular functionality, other tools may encompass a bit of many functions, or there are the tools that are all encompassing.
- The options that are presented are ones that we have ranked as simple and familiar, medium level with more functionality, higher level with even more funtionality, and the granddaddy of Project Management Software.
- The one common factor among these particular software is that there is a free trial version available and the pricing is not a hidden secret. It is important to note that you should only consider software you can test out before purchasing the software.

SLIDE 24

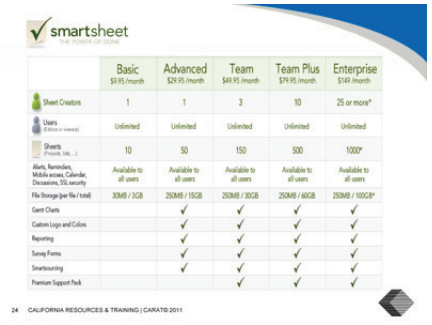
SmartSheet

- Smartsheet is simple and familiar because it's data entry format is very much like a spreadsheet.
- If you are already a user of Google apps, then this product has a seamless integration with other goggle apps.
- The disadvantage is that is not feature rich for projects that require a higher level of complexity.

SLIDE 25

SmartSheet Pricing

- Review the pricing module.
- Use this as an example of how different vendors price by users versus the number of projects you can create.
- Some vendors breakdown their pricing levels by feature availability



SLIDE 26

Central Desktop

- This is a mid range tool that allows for more functionality.
- This online app allows you to sync with your Outlook Calendar.
- There is a free basic version available.

SLIDE 27

Clarizen

- This offers more functionality than Central Desktop.
- One of the best features is the ability to have email only users who can update status through email without having to log into the application.
- It also offers a tool that sends out reports to non users as well.
- It is more complex than the other tools so far, but still considered simple enough for non project management level users.

SLIDE 28

Microsoft Project

- Microsoft Project is considered the grandfather of the project management tools because it's been around a long time.
- Many Project Managers are trained in the use of this tool and many non project manager users find it difficult to use.
- Larger organizations use this tool in an environment that supports infrastructure that includes Project Server.

PART VII – Next Steps [15 Minutes]

SLIDE 29

Next Steps

Take a Test Drive

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SLIDE 30

Software Demo

Demonstration of an Online App

Presenter will now switch to an Online App

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SLIDE 31

Moving Forward

Next STEPS

Evaluate Your Options

- Take advantage of the free trial versions, webinars, product guides, review

One Size doesn't fit all

- As you evaluate your options, think about the tools in terms of your own business needs. Find a good fit.

Don't Get Tech Happy

- Be realistic and practical, know that as a small business owner, simple and easy is better than nothing at all

Cost

- Technology is not a one time purchase. Be prepared to look at the cost as a long-term investment. Think of the value in terms of what it will do for your business.

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SLIDE 32

More Information

List of Resources

- For more information on the discipline of project management visit http://www.pmi.org
- There is a wide variety of Project Management Software available. You can start by reviewing these products:

Smart Sheet http://www.smartsheet.com/	**Microsoft Project (Windows based product)** http://www.microsoft.com/project
Clarizen http://www.clarizen.com/	**OmniPlan (MAC based product)** http://www.omnigroup.com/products/omniplan
Central Desktop http://www.centraldesktop.com	**BaseCamp** http://basecamphq.com/
Manymoon (casual and free) https://www.manymoon.com	**GoPlan** http://goplanapp.com/home/plans

- Q&A

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