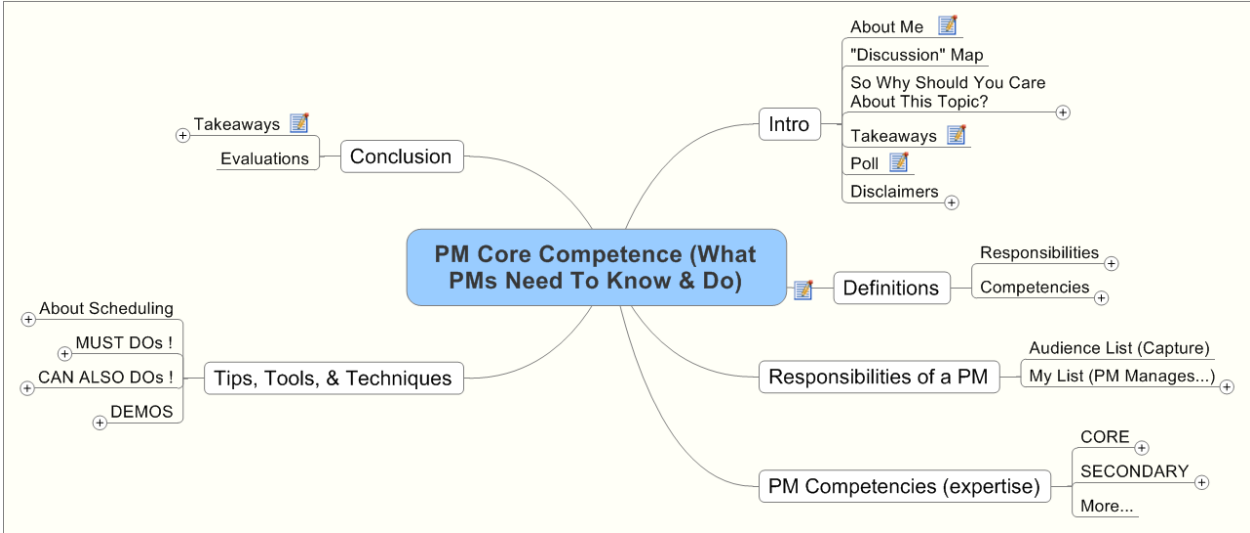


# PM Core Competence (What PMs Need To Know & Do)



What "great" PMs do.

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## 1 Intro

### 1.1 About Me

At the core, I am a techno-geek with a personality - basically a mutant - extreme geek AND extreme people- person  
= Good formula for a PM

**NOW:** Professional Services Program Manager - implement new Cold Supply Chain (Cold-Chain) Programs for Food & Drug Companies.

**PAST:** Everything from Embedded Signal Processing Dev. Eng to VP of Government Programs

I am a walking case study of PM practices

### 1.2 "Discussion" Map

### 1.3 So Why Should You Care About This Topic?

#### 1.3.1 You are a professional!

#### 1.3.2 Expectations for a PM...

*To meet*

*To set / assert*

#### 1.3.3 Clarity of Role

*Varied Perspectives on What PMs Do*

What do Project Management, Projects, Programs, PM mean to you? Your Company?

### 1.3.4 Articulate PM Value Proposition

### 1.3.5 Find and Fill Your Gaps

### 1.3.6 Target Your Efforts

*Know what to work on*

*Know where to aim*

### 1.3.7 Embolden Your Leadership

## 1.4 Takeaways

Main Objective - This is about enhancing PM core competence

At the end of this you will be equipped to:

- Recognize a more full scope of PM responsibilities
- Use other approaches to PM practices you may already do
- Build your war chest of tools
- Execute planning and tracking projects with tools that simplify the process

## 1.5 Poll

- How many feel that can clearly describe what the job of a PM is? Your job? Would your boss agree?
- How many feel can articulate the value of PM to your company?
- How many can clearly define the boundaries between you and the Business Analyst? Functional Managers in the organization? Other roles in the organization?
- How many people use a Spreadsheet of list (Excel, checklist, etc.) for Scheduling?
- How many people use MS Project for Scheduling? Other scheduling engine?
- How many routinely do risk assessment?
- How many use the risk assessment to actively manage risks?
- How many have non-PM responsibilities (are resources) on their projects?
- How many feel overwhelmed with information and tasks to track?
- How many manage progress by % complete?
- How many manage progress by reported work (time sheets = time on task logs)?
- How many believe that the logged time?
- How many think total time worked in an 8 hr. day should be 8 hrs. (100%)?
- How many use Earned Value Management?
- How many track budgets as part of your projects?
- How many use critical path analysis? For what?
- How many use dynamic scheduling / connected networks? How many even know what that is?

- How many understanding the underlying scheduling engine in whatever scheduling software you use?
- How many are yet to be sold the value of doing all this stuff?
- 
- ==> A WIDE VARIETY OF PERSPECTIVES !

## **1.6 Disclaimers**

**1.6.1 Lots of Info - use for reference**

**1.6.2 Not "one size fits all" - Use what fits**

## **2 Definitions**

### **2.1 Responsibilities**

**2.1.1 What work does the PM own?**

**2.1.2 What expected of a PM?**

**2.1.3 Scope of PM job description**

### **2.2 Competencies**

**2.2.1 What skills and abilities should a PM have?**

**2.2.2 Expertise at...?**

## **3 Responsibilities of a PM**

### **3.1 Audience List (Capture)**

### **3.2 My List (PM Manages...)**

#### **3.2.1 Schedule**

*Plan VS. Actuals*

How gather Actuals?

#### **3.2.2 Cost/Budget**

#### **3.2.3 Scope**

*WBS*

Captures the Detailed Process

To apt level

*Change Mgt.*

Averse - Rigid

Flexible - Agile

Impact Assessment

***Requirements***

What's In/Out

Must /Nice To Have

Priority Ranking

Incremental - Phased Release

### **3.2.4 Communications**

***Status Reporting***

***Team coordination***

***Stakeholder Information Sharing***

### **3.2.5 Risk**

***Ex. QA Defects***

### **3.2.6 Issues**

### **3.2.7 Resource**

***Utilization***

***Availability***

Vacations

Risk Link

Negotiate Time Share

Right Resources

***Internal***

***External***

***Work Assignment***

***Tracking Actuals***

### **3.2.8 Expectations**

### **3.2.9 Roles & Responsibilities**

### **3.2.10 Assets & Artifacts**

### **3.2.11 Organization Taxonomy/Templates**

### **3.2.12 AI's, Decisions, History**

### **3.2.13 Document Integrity**

## **4 PM Competencies (expertise)**

### **4.1 CORE**

#### **4.1.1 PM Methodology**

##### *Approach to delivering to constraints/expectations*

What do, when, and how?

##### *Factors Influencing PM Approach*

PM WORKING knowledge of Methods

Company Cultures

*Ad-hoc*

*Structured*

*Continuous Improvement*

*Maturity - CMMI*

Management buy-in

PM Power in Organization

Company's accepted PM Methodology, tools, and Systems

*Agile*

*Proprietary Systems*

#### **4.1.2 PM Tools**

##### *Put Scheduling Engine To Work*

CPM - Real Opportunities

Conflicts

Change Impact

Calendar Reality

*Company Holiday*

*Resource*

Simulate/Model Reality

Connected Networks

Task Types - Mythical Man Month

*Others - See Tools & Techniques (later)*

#### **4.1.3 Development Lifecycle - SDLC**

*The Process*

#### **4.1.4 Product Knowledge**

#### **4.1.5 Industry Knowledge**

*Understand the glossary and know the lingo.*

*Example (me)*

Wireless Telecom

CRM

eBusiness Enterprise Software

Video Production

eLearning

Financial Services

Insurance

Government Processes

Language Software Dev

Food & Drug (Cold) Supply Chain

#### **4.1.6 Organizational Skills**

## *Personal Time Management*

## *Information Management*

### *Be the Best Crack Sealer!*

Keep things from falling through the cracks

#### **4.1.7 PM Scaling (right-sizing)**

### *Separate Processes for Short/Long Projects*

### *Level of detail in schedule*

### *Work/Time on task tracking vs. percent complete.*

### *A schedule engine used at all*

Difference b/t checklists, Excel, Scheduling Engine

### *Reduce rigor for less complex*

Don't necessarily do every activity to the same depth as a major project and consider leaving some steps out. Ex. Stakeholder Analysis may be as basic as noting some of the sponsor's preferences or hot button concerns on a small effort.

Lighten up on change control process if the project is smaller and unknown (likely to have many changes)

Focus on documents that are deliverables to the customer



#### **4.1.8 Articulating the PM Value Proposition**

*Challenges*

#### **4.1.9 Soft (people) Skills**

*Influence up, down, and lateral*

*Negotiate*

*Support, encourage, reward, discipline*

*Resolve Conflict*

*Communicate Effectively*

*Team Leadership/Dynamics*

#### **4.1.10 Company Structure/Organization**

### **4.2 SECONDARY**

#### **4.2.1 Business & Systems Requirements Analysis**

*Use Cases*

*UI*

#### **4.2.2 Business Skills**

*Proposals*

*Sales*

*Pricing*

#### **4.2.3 Technical/Technology**

#### **4.2.4 Problem Analysis/Solving**

#### **4.2.5 Analytics**

#### **4.3 More...**

## **5 Tips, Tools, & Techniques**

### **5.1 About Scheduling**

#### **5.1.1 Why do Schedules?**

## *Planning has inherent value*

Quote about planning

*Helps define the problem / solution so others can fill in*

*Communicates to Stakeholders + confidence that there is a plan*

*Answers "What next?"*

*See conflicts*

*Clarity of a plan*

### **5.1.2 Connected Networks**

### **5.1.3 Use Linked Milestone Summary**

### **5.1.4 Use a Project Scheduling Engine**

*You are a professional!*

### **5.1.5 Use Rolling Wave Planning**

Get major components then refine with more detailed tasks

Allows you to do quick estimated and scheduling - Demonstrate PS PM Template - the 10 minute schedule

## 5.1.6 Schedule Development Steps

### *Problem - define well*

Requirements/use cases - BA/PM

### *Brainstorm work/Solution components - WBS*

### *Duration Estimates*

### *Sequencing*

### *Resources*

### *Task Types*

### *Optimize & adjust to reality*

Level

Crash

### *Extract Key Milestones*

### ***PUBLISH!!!***

## 5.1.7 Use Automated Stoplights

## 5.1.8 DEMO: Use different views at each stage

## 5.2 MUST DOs !

### 5.2.1 Ring on the finger - Get Engaged!

#### *Define a concrete START trigger*

Have a clear engagement process

Ex. Siebel - Signed SOW - Avoids fuzzy starts

Ex. Sensitech PS - Signed Proposal

## **5.2.2 Kickoff on the right foot, follow with left!**

*Team*

*Team Site*

*Recurring Meetings*

*Initial Schedule*

*Review Lessons Learned Database*

At start of new project

Generate some AI's

## **5.2.3 (Weekly) Team Meeting**

*Momentum*

*Progress and Accountability Way point*

*Review/Update Action Items*

*Review/Update Issues List*

*Review/Update Risks*

*Review/Update Lessons Learned*

*Set Next Agenda Items*

## **5.2.4 RASCI**

Responsible-Accountable-Supportive-Consulted-Informed

Who OWNS what? Who helps, etc. <> Resource Management - Primarily a communications and expectation management tool.

## 5.2.5 Stakeholder Analysis

## 5.2.6 End Well

*Handoff Ownership*

*Capture Lessons*

*Finalize docs, issues, etc.*

*End recurring activities*

*Recognize/Celebrate*

## 5.3 CAN ALSO DOs !

### 5.3.1 Practice PM at home

### 5.3.2 Using Agile Tools in Traditional Projects

Planning board? - Big and Visible and Interactive

Burndown Chart

Splitting work into iterations

- Requirements Filtering - Must have / Nice to Have / Internal-External - Ex Mass Auto.
- Requirements Prioritizing

SCRUMS - short, frequent meetings vs. longer, less frequent meetings

Velocity metrics

Lighter...EVERYTHING?

## **5.4 DEMOS**

### **5.4.1 DEMO: Ideation & Planning - MindManager**

*Brainstorming*

*Planning*

*Information Gathering/Capture*

*Requirements Analysis*

*Scope - WBS*

*Templates*

*Information Organization*

*Presenting*

### **5.4.2 DEMO: PROJECT Workbook or Event Log**

### **5.4.3 PM Tracking Tool - piXLPROs**

### **5.4.4 DEMO: Team Sites - SharePoint, Confluence**

*Tracking / Managing - Lists*

*Notifications*

*Visibility to all*

*Self-Serve*

*Centralized Information*

*Document Versioning*

*Templates - Quick Setup*

*Collaboration - Wiki's, Discussions*

*Status/Progress updates - self serve*

*Communication*

*Team Builds Weekly Meeting Agenda*

*Quick & Easy Startup*

## 6 Conclusion

### 6.1 Takeaways

Does this help to enhance PM core competence?

Are you now more empowered to:

- Recognize a more full scope of PM responsibilities?
- Use other approaches to PM practices you may already do?
- Build your war chest of PM tools?
- Execute planning and tracking projects with tools that simplify the process?

#### 6.1.1 If you leave with nothing else...

*1. Know/Do Your PM Responsibilities*

*2. Be an EXPERT in PM Competencies*

*3. Remember, PM is much more than Schedules & Excel Sheets*

*4. Aspire to be a Crack Sealer!*

### 6.2 Evaluations