

Pulling It All Together

How Project Management
Increases Efficiency

Presented by:
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Agenda

- What is project management (PM)?
- Integrating PM into your Affiliate
- Goals, Objectives, Scope and Tasks
- Resources
- Work Breakdown Structure (WBS)
- Scheduling – Gantt Charts
- Monitoring and Evaluating
- Questions



What is Project Management?

The discipline of planning, organizing, securing, managing, leading, and controlling resources to achieve specific goals



Integrating Project Management

Integrated Strategic System



Poorly Integrated System



Goals, Objectives, Scope and Tasks

- **Goals**
 - Establish Affiliate Strategic Goals to help you accomplish your mission
- **Objectives**
 - Defines the projects created to support Strategic goals
- **Scope**
 - Defines the parameters of the project
- **Tasks**
 - Each objective will be further broken down into tasks that can be assigned to individuals

SMART Goals are:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**ime-bound



Objectives

- Simple statement of what the project will accomplish
 - Should be shared and reflect the team's consensus regarding what the project will involve
 - Should be short – between 25-50 words; this will help force clarity
 - Should be simple, free of jargon and acronyms and SMART
 - Focus on the What, not the How

Scope within the Triple Constraint

- Scope articulates what will be done, by when, at what cost, and with what resources
- Triple Constraint
 - Time
 - Money
 - Scope
- Usually 2 out of the 3 will be constrained; sometimes all three
- Establish clear scope so the project doesn't become too unwieldy – make sure to include what will NOT be included in the project



Tasks

- The lowest level of your project plan; tasks can be scheduled, cost estimated, monitored and controlled.
- Follow the 8-80 rule: no task should take less than 8 work hours or longer than 80.



Identifying and Distributing Resources

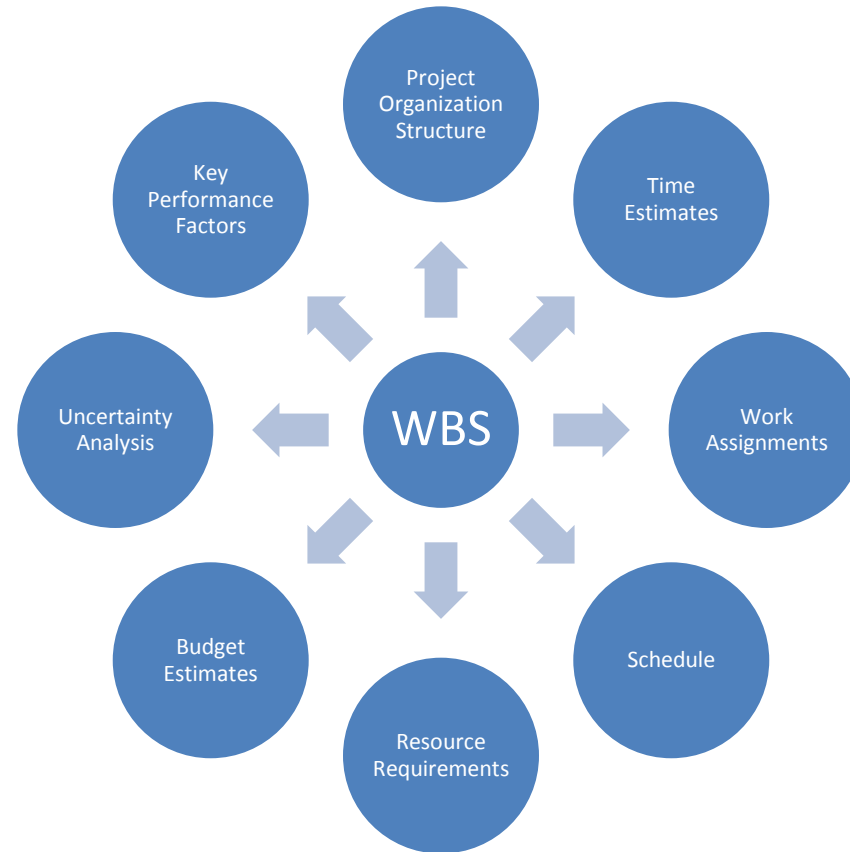
- Work with the team to identify what resources will be needed – estimate the maximum amount you will need
- List available resources and the amounts that you have
- Prioritize tasks by importance if resources are scarce
- Remember that people are your biggest resource – make sure that accurate time estimates are being made

Work Breakdown Structure (WBS)

- An outline to help keep a project on track, allocate resources, and insure that no work is forgotten
- Hierarchy of a WBS
 - Project
 - Major Deliverables
 - Tasks



WBS at the Center of the Project



Example Project

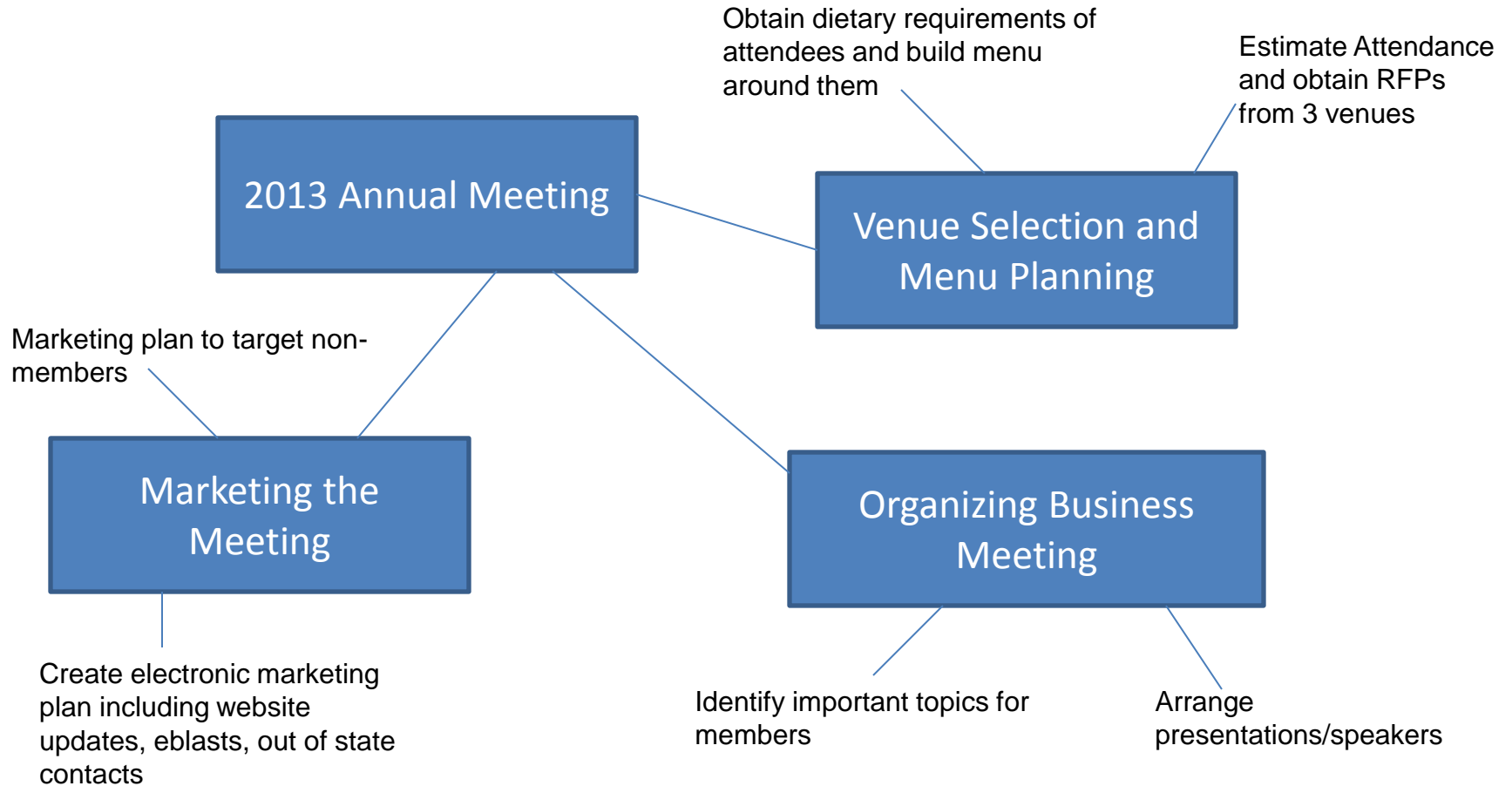
- Planning your Annual Meeting
 - Including an educational component for a full day of lectures/seminars



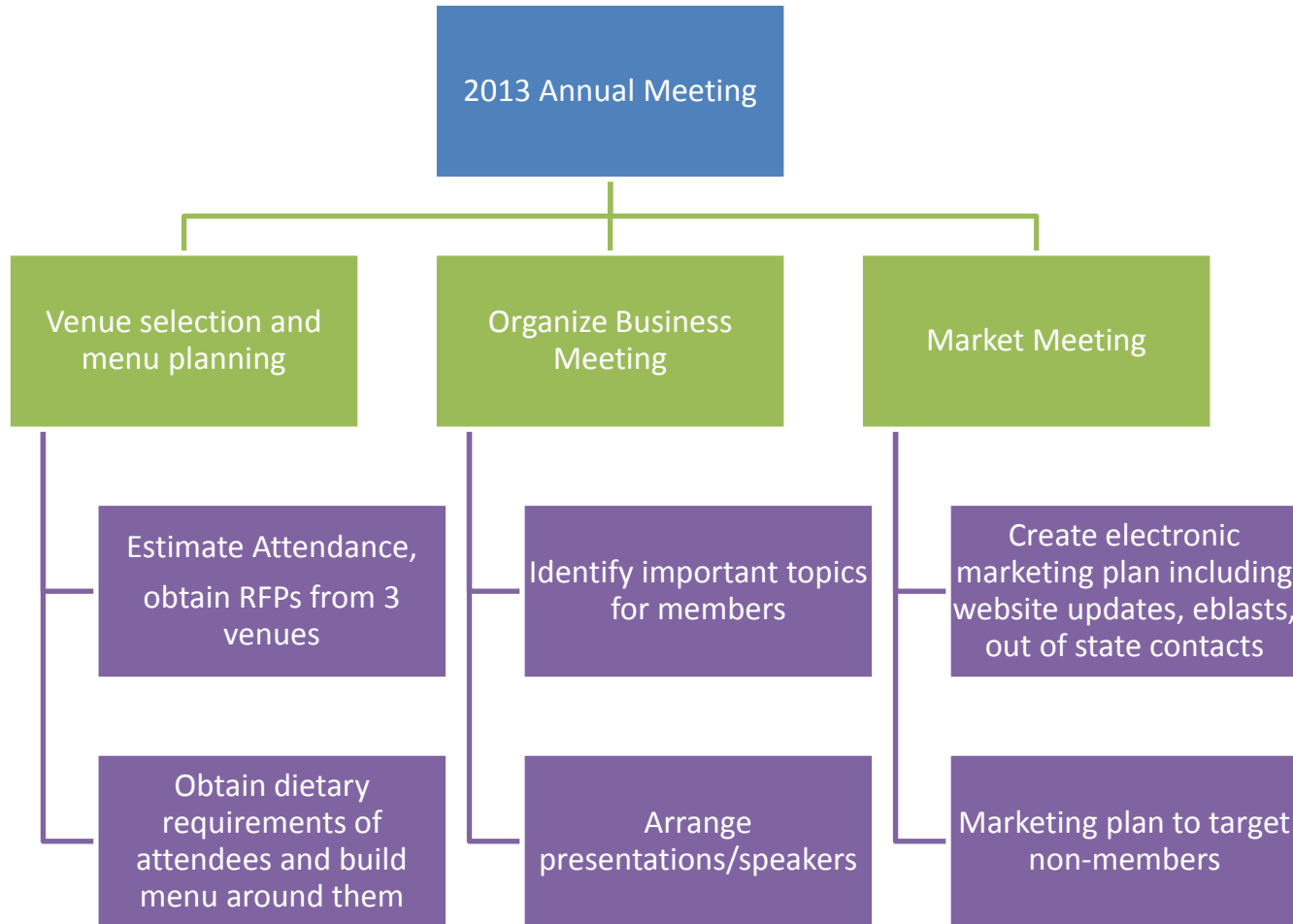
Outline Approach to WBS

2013 Annual Meeting WBS		
Deliverable 1	Venue selection and menu planning	
	Task 1.1	Estimate Attendance, obtain RFPs from 3 venues
	Task 1.2	Obtain dietary requirements of attendees and build menu around them
Deliverable 2	Organize Business Meeting	
	Task 2.1	Identify important topics for members
	Task 2.2	Arrange presentations/speakers
Deliverable 3	Market Meeting	
	Task 3.1	Create electronic marketing plan including website updates, e-blasts, out of state contacts
	Task 3.2	Marketing plan to target non-members

Mind Mapping Approach to WBS



Organizational Chart WBS



Gantt Charts: timing is everything

Graphically display
when tasks will be
taking place

- Visualize the entire project
- Understand resource demand
- Recognize order of tasks



Example Gantt Chart

	8 weeks	7 weeks	6 weeks	5 weeks	4 weeks	3 weeks	2 weeks	1 week	Week of
Venue and Menu Planning									
Attendance, RFPs									
Diets, menu planning									
Org Business Mtg									
ID topics									
Arrange speakers									
Market Meeting									
E-media development									
non-member plan									

Monitoring Your Project

- Progress should be measured consistently so adjustments can be made if needed
- Use these tools as a guide to help keep you on track and allocate resources such as people and time
- Revisit your WBS and Gantt Chart regularly to reevaluate the project – make adjustments when necessary
- Keep a log of what actually happened; this can be separate from or included in your WBS and Gantt Chart

Evaluating Your Project

- Have a project de-brief after with the team to see what went well/what didn't
- Record your results and create best practices that can be used for future projects
- Use what you learned and implement them into your Affiliate's way of doing things – don't reinvent the wheel with every project
- Learn from your mistakes; don't try to ignore them

Questions?

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