The Executive Perspective on Project Management

The Role of the Leader in Project Management
Introduction and Objectives

- A little about Gina Abudi
- Today’s topics
  - Why project management matters
  - The executive’s role
  - Balance being informed vs. entrenched in details
  - Selecting, prioritizing and launching projects
  - Charters and Scope Statements (and other documents)
Projects have a...
- definitive start and end date
- defined scope

Projects vs. Operations

Project management is...
- applying knowledge, skills, tools and techniques to work initiatives to achieve specific goals
What challenges have been observed in getting initiatives launched and completed within your association?

Discuss with the group and jot down a few challenges of your own in the space provided on page 5 of the handout.
The role of the Project Sponsor

- Key to project success!

Evaluate the project to ensure continued viability

- Larger association – oversight only
- Smaller association – oversight + work on project initiatives
Balance: Informed vs. Details (page 7)

- **Informed:**
  - Weekly reports on status from team
  - Enable for autonomy in completing work of project
  - Push decision making to lower levels

- **Details:**
  - Working on project tasks
  - Lead decision making
  - Lead weekly team meetings

Mainly smaller associations

In either case: NOT Micromanagement!
What is the right balance for you?

Discuss with the group and jot down a few ideas in the space provided on page 7 of the handout.
Management approach to support and manage project selection and delivery

Provides a decision making framework to ensure investment in right projects

Larger associations – may have a formalized structure (Project Governance Council)

Smaller associations – a business case may suffice
Select and Prioritize Projects (pages 8 – 11)

- Ensures alignment of projects to association strategy
- Ensures alignment with stakeholders’ (members’) needs and expectations
- Use a variety of criteria to select and prioritize
  - Not solely ROI
- Watch for “red flags”
- Smaller associations:
  - Ask key questions for each new program or service launched (bottom of page 10)
What criteria is important for your association?

Discuss with the group and jot down a few potential criteria for your association in the space provided on page 11 of the handout.
Weight Criteria (pages 13 – 14)

- Use weights to evaluate criteria
  - Some criteria more important than others
- See examples on pages 13 – 14 of your handout

Another option to select projects based on value/risk to the association.
How can you weight each criterion you selected?

Discuss with the group and jot down a few ideas for your association in the space provided on page 15 of the handout.
Need to determine what documentation works best for you based on a variety of factors. Keep it simple!
The Project Charter (pages 16 – 17)

- Key responsibility of the sponsor
- Formally kicks off the project
- Provides relevant information:
  - Business case
  - Overall description
  - Key deliverables
  - Potential risks
  - Internal and external stakeholders
  - Benefits and business impact
  - High level milestones
  - Budget and expenditures

See partially completed example of a Charter on page 17.
Key project planning document
A narrative description of the project
Captures a variety of information:

- Justification
- Description (who, what, when and where)
- Objectives
- Constraints
- Assumptions

See partially completed example of a Scope Statement on page 19.
What documentation might you introduce into your association to enable for better management of projects?

Discuss with the group and jot down a few ideas for your association in the space provided on page 20 of the handout.
Resource Planning (pages 20 – 21)

- Broader than just people
- Equipment, tools, technology
- Consider..
  - What are the required resources?
  - When will they be needed?
  - Secure resources and assign to specific tasks
Two Key Meetings (page 21)

Project Kick Off

- 1st meeting
- Increased collaboration
- Understanding of project
- Define roles and responsibilities
- Ensure common processes

Lessons Learned

- Last meeting
- What went well?
- Where do we need to improve?
- Enables for improved in how projects are done
Look for the following from the team:

- Weekly updates
- Overall schedule status
- Overall budget status
- Overall scope status
- Issues or challenges??
Have a process so you get what you need from the team to make a decision

- Key points of the problem
- Various options to address
- Team’s preferred option
- Cost of the preferred options and other impacts
- When a decision is needed
Keep Tabs on your Projects
(page 23)

- Watch out for...
  - Schedule slippage
  - Tasks or activities over budget
  - Project team can’t solve minor issues
  - Changes not well managed
  - Excessive rework and poor quality
Lessons Learned (pages 23 – 24)

- As simple as...
  - What went well?
  - What improvements are needed?
  - What else should be shared?
- For larger, complex initiatives – dive deeper

- Are you a smaller organization?
  - Detailed list of questions asked for deep dives into lessons learned serves as a great checklist!
    - (see page 24 in the middle)
What are your Next Steps?

- Jot down some ideas and take action steps based on our conversation today (page 25 of your handout)

- What else would you like to share?
- What questions do you have?