

“IF YOU DON’T KNOW WHERE YOU ARE GOING, YOU WILL END UP SOMEWHERE ELSE”

HOW TO MANAGE A PROJECT WHEN YOU’RE NOT A PROJECT MANAGER



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WORKSHOP OVERVIEW

Are you thinking about a project or have you been required to spearhead a project for your department, school, or institution, but lack formal project management experience?

Are you unsure where to start, who to involve, and how to get your project off the ground?

If you answered yes to any of these question, then this session is for you!



WORKSHOP PURPOSE

- Focus on the key areas of project management for individuals who have little or no project management experience.
- Help individuals identify the skills and tools needed to manage a project.



WORKSHOP OBJECTIVES

- **Objective 1:** Define the key concepts of a project and the associated requirements for project success.
- **Objective 2:** Identify skills and expertise from various positions within research, and how those skills can be translated into project management.



WHAT DOES A RESEARCH ADMINISTRATOR DO?

According to the Versatile PhD (2019), “research must be funded, managed, coordinated, regulated, reported and sometimes ultimately commercialized. Collectively known as research administration, these activities surround and influence every stage of research. Research administrators work in many settings, including universities, hospitals, government agencies, corporations, medical schools, and nonprofits. They raise funds, write regulation, *coordinate projects*, investigate ethical issues, and many other related tasks.”



- According to the Project Management Institute (**PMI**), “project management is the application of knowledge, skills, tools, and techniques to a broad range of activities in order to meet the requirements of a particular project.”
- There are five phases of project management. The lifecycle provides a high-level view of the project, the phases are the roadmap to accomplishing it.



WHAT PROJECT MANAGEMENT IS NOT



- Project managers (PM's) are not task manager or “to-do” listers; they are critical thinkers, planners, and problem solvers.
- PM's are not an overhead expense; they add value to an organization through their expertise in project management and are part of the organization's team.
- PM's are not “implementers”; they are team leaders and motivators to ensure the project execution takes place on-time, in scope, and within the established budget.
- Project management is not “tool”; rather it is set of principles, guidelines, and best practices for managing projects.
- Project management is not just for large companies. ALL organizations experience change, and project managers ensure delivery and are accountable for the outcome.



PROJECT MANAGEMENT METHODOLOGIES



AGILE PROJECT MANAGEMENT

- Most recognizable project methodology
- Best suited for projects that are complex, incremental, iterative, and require a great deal of flexibility due to changing requirements
- Develops solutions through cross-functional teams
- Typically used for software development



AGILE PROJECT MANAGEMENT

- **Values**

- Individuals and interactions
- Customer collaboration
- Responsiveness to change over following a set plan

- **Principles**

- Accommodation of changing requirements
- Support and trust
- Simplicity
- Self-organized teams
- Regular “reflection” and feedback



LEAN PROJECT MANAGEMENT

- Also a popular project management methodology
- Promotes maximizing custom value, while minimizing waste
- Stems from the Japanese manufacturing industry
- Ideal for businesses looking to transform how they operate, not necessarily for delivery of a product



LEAN PROJECT MANAGEMENT

- **Values**
 - Efficiency
 - Customer value
 - Improved quality
 - Reduced costs
- **Principles**
 - Identifying the customers values
 - Identifying inefficient steps
 - Improvement of flow
 - Removal of unnecessary steps



WATERFALL PROJECT MANAGEMENT

- Most traditional project management methodology
- Follows a linear, sequential design approach
- Progress flows downward in one direction
- Originates from manufacturing and construction industries
- Projects are completed in phases
- Best suited for larger projects that have strict deadlines and where changes in project requirements are uncommon



WATERFALL PROJECT MANAGEMENT

- **Values**

- Low-risk
- Consistency
- Strict processes

- **Principles**

- Linear approach
- Importance of documentation
- Completing the project in phases/stages



PROJECT MANAGEMENT INSTITUTE (PMI)

PROJECT MANAGEMENT

- Not a project management methodology more of “best practices”
- Non-profit organization that provides project management certification
- Certification is open to anyone who meets the requirements for certification, and passes the certification exam
- Gold/Industry standard of project management and project management professionals
- Set of overarching standards and techniques that govern project management



THE RELATIONSHIP BETWEEN PROJECT MANAGEMENT AND RESEARCH

✓ **Analytical Thinking**

- ✓ Problem solving
- ✓ Critical thinking
- ✓ Global thinking

✓ **Communication**

- ✓ Verbal
- ✓ Written
- ✓ Interpersonal

✓ **Financial Skills**

- ✓ Budget development
- ✓ Budget reconciliation
- ✓ Invoicing
- ✓ Financial management

✓ **Project Management**

- ✓ Monitor progress
- ✓ Review progress
- ✓ Report on progress
- ✓ Communicate status

✓ **Policies and Procedures**

- ✓ Develop
- ✓ Implement
- ✓ Monitor

✓ **Provide Support and Resources**

- ✓ Direct individuals to resources
- ✓ Serve as a subject matter expert



FIVE STAGES OF PROJECT MANAGEMENT

- Initiation
- Planning
- Execution
- Performance/Monitoring
- Project Close



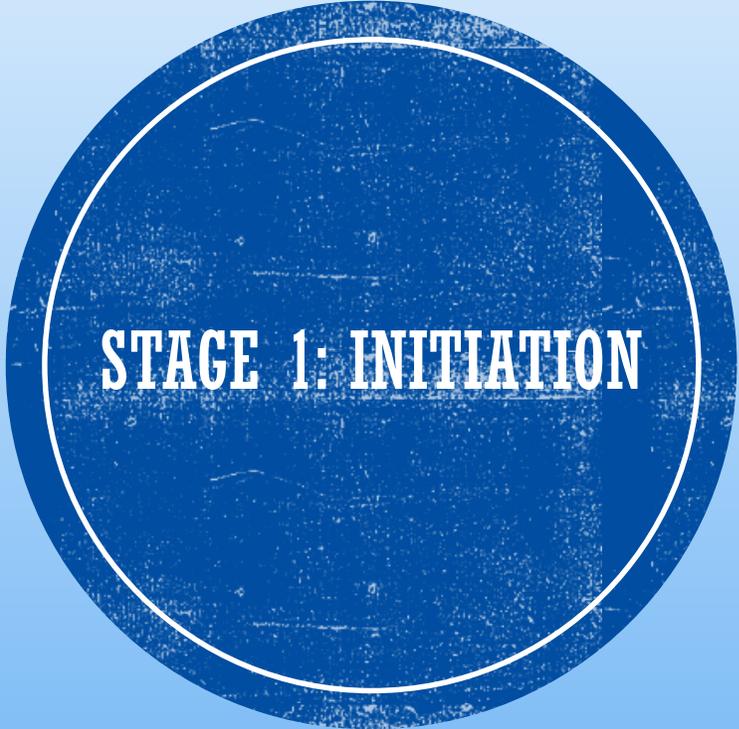


PHASE 1: PROJECT INITIATION



This is the start of the project, and the goal of this phase is to **define the project** at a broad level. This phase usually begins with a business case. This is when you will research whether the **project is feasible** and if it should be undertaken. If feasibility testing needs to be done, this is the stage of the project in which that will be completed.

PHASE 1: PROJECT INITIATION



STAGE 1: INITIATION

Important **stakeholders** will do their due diligence to help decide if the project is a “go.” If it is given the green light, you will need to create a project charter or a project initiation document (PID) that outlines the purpose and requirements of the project. It should include business needs, stakeholders, and the business case.

SKILLS NEEDED FOR THE INITIATION PHASE

- Critical thinking
- Problem solving
- Communication
- Global thinking
- Coordinating resources
- Providing direction and support
- Political capital and savvy



PHASE 2: PROJECT PLANNING



STAGE 2:
PLANNING

- This phase is key to successful project management and focuses on developing a roadmap that everyone will follow.
- This phase typically begins with **setting goals**. Two of the more popular methods for setting goals are S.M.A.R.T. and CLEAR.



Specific – To set specific goals, answer the following questions: who, what, where, when, which, and why.

Measurable – Create criteria that you can use to measure the success of a goal.

Attainable – Identify the most important goals and what it will take to achieve them.

Realistic – You should be willing and able to work toward a particular goal.

Timely – Create a timeframe to achieve the goal.

S.M.A.R.T. GOALS – THIS METHOD HELPS ENSURE THAT THE GOALS HAVE BEEN THOROUGHLY VETTED.

ALSO PROVIDES A WAY TO CLEARLY UNDERSTAND THE IMPLICATIONS OF THE GOAL-SETTING PROCESS.





Collaborative – The goal should encourage employees to work together.

Limited – They should be limited in scope and time to keep it manageable.

Emotional – Goals should tap into the passion of employees and be something they can form an emotional connection to. This can optimize the quality of work.

Appreciable – Break larger goals into smaller tasks that can be quickly achieved.

Refinable – As new situations arise, be flexible and refine goals as needed.

C.L.E.A.R. GOALS – A NEWER METHOD FOR SETTING GOALS THAT TAKES INTO CONSIDERATION THE ENVIRONMENT OF TODAY'S FAST-PACED BUSINESSES.





STAGE 2: PLANNING

- During this phase, the **scope of the project is defined**, and a project management plan is developed. It involves identifying the cost, quality, available resources, and a realistic timetable. The project plans also includes **establishing baselines** or performance measures. ***These are generated using the scope, schedule and cost of a project.*** A baseline is essential to determine if a project is on track.
- At this time, **roles and responsibilities** are clearly defined, so everyone involved knows what they are accountable for.

SKILLS NEEDED FOR THE PLANNING PHASE

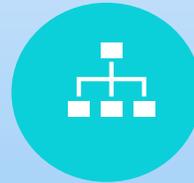
- Critical thinking
- Problem solving
- Organization
- Attention to detail
- Communication
- Budget development
- Social and political capital



STAGE 2: PLANNING



Scope Statement – A document that clearly defines the business need, benefits of the project, objectives, deliverables, and key milestones.



Work Breakdown Schedule (WBS) – This is a visual representation that breaks down the scope of the project into manageable sections for the team.



Milestones – Identify high-level goals that need to be met throughout the project and include them in the Gantt chart.



STAGE 2: PLANNING



Project Timeline– A visual timeline that you can use to plan out tasks and visualize your project timeline.



Communication Plan – This is of particular importance if your project involves outside stakeholders. Develop the proper messaging around the project and create a schedule of when to communicate with team members based on deliverables and milestones.



Risk Management Plan – Identify all foreseeable risks. Common risks include unrealistic time and cost estimates, customer review cycle, budget cuts, changing requirements, and lack of committed resources.





STAGE 3: EXECUTION

Tasks completed during the Execution Phase include:

Develop team

Assign resources

Execute project management plans

Procurement management if needed

PM directs and manages project execution

Set-up tracking systems

Task assignments are executed

Status meetings

Update project schedule

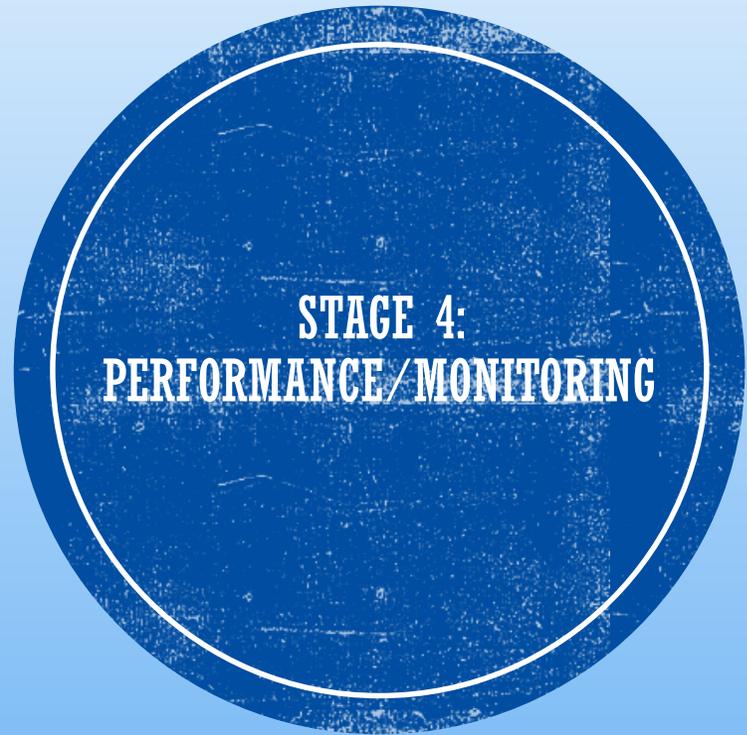
Modify project plans, as needed

SKILLS NEEDED FOR THE EXECUTION PHASE

- Communication
 - Verbal
 - Written
 - Interpersonal
- Problem solving
- Critical thinking
- Organizational
- Financial management
- Project management
 - Monitoring progress
 - Review progress
 - Report progress
- Team supervision
 - Provide support
 - Provide motivation
 - Provide resources
 - Provide guidance
 - Provide feedback
- Social & political capital
- Crisis management skills



STAGE 4: PERFORMANCE/MONITORING



- This phase is all about **measuring project progression and performance** and ensuring that everything happening aligns with the project management plan. Project managers will use key performance indicators (KPIs) to determine if the project is on track. A PM will typically pick two to five of these KPIs to measure project performance.

STAGE 4: PERFORMANCE/MONITORING

- **Project Objectives:** Measuring if a project is on schedule and budget is an indication if the project will meet stakeholder objectives.
- **Quality Deliverables:** This determines if specific task deliverables are being met.
- **Effort and Cost Tracking:** PMs will account for the effort and cost of resources to see if the budget is on track. This type of tracking informs if a project will meet its completion date based on current performance.
- **Project Performance:** This monitors changes in the project. It takes into consideration the amount and types of issues that arise and how quickly they are addressed. These can occur from unforeseen hurdles and scope changes.
 - During this time, PMs may need to adjust schedules and resources to ensure the project is on track



SKILLS NEEDED FOR THE PERFORMANCE PHASE

- Communication
 - Verbal
 - Written
 - Interpersonal
- Problem solving
- Critical thinking
- Organizational
- Financial management
- Project management
 - Monitoring progress
 - Review progress
 - Report progress
- Team supervision
 - Provide support
 - Provide motivation
 - Provide resources
 - Provide guidance
 - Provide feedback
- Social & political capital
- Crisis management skills





- This phase represents the **completed project**. Valuable team members are recognized.
- Once a project is complete, a PM will often hold a meeting – sometimes referred to as a “post mortem” – to evaluate what went well in a project and **identify project failures**. This is especially helpful to **understand lessons learned** so that improvements can be made for future projects.



STAGE 5: PROJECT CLOSE

- Once the project is complete, PMs still have a few tasks to complete.
 - They will need to create a project punchlist of things that didn't get accomplished during the project and work with team members to complete them.
 - Perform a final project budget and prepare a final project report.
 - Finally, they will need to collect all project documents and deliverables and store them in a single place.

SKILLS NEEDED FOR THE CLOSING PHASE

- Critical thinking
- Global thinking
- Organizational skills
- Communication skills
 - Verbal
 - Written
 - Interpersonal
- Social & political capital
- Operational skills
 - Policies
 - Procedures
- Financial management skills
- Program evaluation
 - Report on final outcomes



PROJECT MANAGEMENT IN AN ACADEMIC SETTING

- **Quality Assurance Evaluation**
 - Assess infrastructure changes
 - Changes in business scope
 - Introduction of new technologies
- **Implementing a major business changes**
 - Changes in governing policies and associated procedures
- **Investment logic mapping (ILM)-changes to operating policies**
 - Requires stakeholder buy-in
 - Set of comprehensive strategic interventions
 - Actions and solutions



PROJECT MANAGEMENT IN AN ACADEMIC SETTING

- **Program Management**
 - Monitoring progress
 - Reviewing progress
 - Reporting on progress
 - Communicating status
- **Change Implementation**
 - Evaluation of feasibility
 - Development of a strategic plan
 - Development of a communication plan
- **Implementing Software**
- **Business Process Evaluations**
 - Assess operating efficiency



WORKSHOP TAKEAWAYS

- Research professionals possess a wide variety of skills that are applicable to project management.
- There are several types of project management and understanding the type of project is important when selecting the project management methodology.
- Managing projects is a complex process that involves many phases.
- PMI provides a set of technique and best practices to ensure successful project delivery.
- Projects of all types, scope, and budget can benefit from project management.
- Anyone can learn project management!



QUESTIONS



QUESTIONS AND CONTACT INFORMATION

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