Project Management 101 - Maximizing Results

PwC for FIRST WASHINGTON
May 2020
## Agenda for Today

**Financial Literacy 101: Maximizing Results**

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<td>3 - Managing Execution</td>
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1 Introductions
Welcome - Hosted by PwC

PwC’s professional services, including **audit and assurance**, **tax** and **consulting**, cover such areas as **cybersecurity and privacy**, **human resources**, **deals** and **forensics**. We help resolve complex issues and identify opportunities across these industries.

**Who’s Here Today:**

Lindsey Haynes  
Shelly Gasperine

236,000 Professionals in 157 Countries
Our purpose
To build trust in society and solve important problems

Our vision
To be the leading professional services firm in the world

Our values
Act with integrity
Make a difference
Care
Work together
Reimagine the possible
2 Foundations of Project Management
The strategic imperative for Project Management

“Today is the slowest rate of change we will ever experience”

- Increasingly disrupted markets
  - Economic & Demographic shifts
  - Regulatory Changes
  - Growing digital economy
  - Changes in characteristics and expectations of customers
  - Group / Board Strategy Initiatives

- Rapidly transforming all aspects of the organisation
  - Cost Structures
  - Organisation Design & Business Transformation
  - Technological Investments
  - Process Improvements & Outsourcing

- Creating sustainable value
  - Ability to execute
  - Capitalise on market change
  - Identify new market opportunities for your clients
  - Improvements and efficiencies in working practices
  - Increase in ROI and net profit
FIRST Teams - What is the biggest struggle with your current project execution and management?
Project Management – More than just a plan?

“We will either find a way, or make one”
“Don’t find fault, find a remedy”

- Learning from failure
- Organising Chaos
- Retain and use knowledge
- Managing Risk & Clearing Issues
- Communication
- Managing Quality
- Managing Change
- Managing Integration
Key Terms for Managing Successful Projects

Project Structure and Planning
- Vision
- Scope
- Goals / Milestones
- Gantt Chart / Project Plan
- Status Tracking

Resources and Budgeting
- Allocating Budget and Resources
- Budget-to-Actual Tracking

Monitoring Benefits / Project Health
- Project success metrics
- Key Performance Indicators (KPIs)
- Dashboard / Project Health

Managing Stakeholders / Communications
- Stakeholder register
- Communications Plan
- Cadence

Managing Project Risk
- Risk Register
- Risk Mitigation
- Issue Tracker
If one baker can make a loaf of bread in one hour in an oven, how many loaves can ten bakers make in one hour?

100
10
1

Carb-free, gluten-free please!
Project Management Triangle

All projects, no matter how large, small or complex, have the **same triple constraint**

Projects are Limited / Restrained by:

- Scope
- Time
- Resources

*Impacts Quality*
Managing Project Risks - What can go wrong?

Why people who commission change don’t get what they want?

- Change(s) in scope mid-project (41%)
- Poor estimates in the planning phase (39%)
- Insufficient resources (30%)
- Weak project planning (21%)
- Lack of control management (15%)
- Lack of executive sponsorship (15%)
- Change in strategy (8%)
- Change in environment (6%)
- Ineffective procurement/supplier (6%)

The Top Three reasons for project failure – regular theme since 2004!

Source: PwC PPM Survey 2014
Managing Execution
What project management tools does your team use today?

Ansana, Monday, Meister Task (or similar app based solution)

Google Sheets

Microsoft Project, Excel

Post-its

JIRA
Organizing your work - Teams, Projects, Tasks
# Example Planning - Using Gantt Chart Templates

To locate an example Gantt Chart in Google Sheets

New > From Template > Project Management
Leveraging Gantt Charts for Project Planning and Tracking

In your planning processes, break work into Phases, workstreams and milestones

Many great project plan examples exist online, just like this one >>>>>>
Features that may be useful for project-management based apps

- Daily email reminders of tasks due.
- Drag and drop functionality.
- Standardized and custom templates.
- Ad hoc reporting.
- Mobile app.
- Forms integration.
- Private projects, if needed.
- Custom fields.
- Timeline and calendar views.
- Attachments and links to Google drive.
- Set recurring tasks and dependencies.
- Tags, likes, and @mentions.
- Status updates and reporting.
Workflow and Automation
Leveraging Forms for Workflow

Automate and assign tasks and workflows.
Example - Team Procurement Request

Create a ‘workflow’, like this sample procurement request (Microsoft Forms)

Or T-shirt Request (Google Forms)
Create a Workflow - Using Forms
Remember, design with the end-result in mind :)

1. Create Poll / Form
2. Distribute to Team
3. Monitor Results
4. Follow Up

Send and collect responses

Only people in my organization can respond

Recipients can scan the code on a phone or tablet to access the form.

Download
Process / Workflow Design
Define process end-to-end, owners, and SLAs

**Process flow:** Define Process / Outcomes
(bonus -- create in Visio)

**Process Owner:** (Finance)
Who fields the requests?

**Service Level Agreement (SLA):**
When can your users expect a response?
e.g. reviewed in 24 hours
Workflow - Automation Using Power Automate

Example of workflow automation with business rules

Start approval when a new item is added

Use this template for processing approvals on SharePoint list items. The approver can view their approval requests in the Approvals Center and over email. Once an item is approved or rejected, the item creator is sent a confirmation email.

This flow will connect to:

- Office 365 Outlook Permissions

michelle.l.gasperine@pw...
Key Takeaways

What does it take to drive Successful Projects?

- Clear Scope
- Resources
- Communication
- Technology
- Measurement
- Team
Q & A
Resources
Resources to Learn and Try

Financial and Project Management Resources

Great templates are available for:
- Gantt Charts
- Agile / Kanban
- Retrospectives
- Budgets

For example, free templates at:
- Google Docs/Sheets
- Microsoft Office Templates

Apps / Tools
- Project Management - Asana, Trello, Basecamp, etc.
- Collaboration - Teams, Slack
- Team Retrospectives - Retrium

PwC Resources
Access Your Potential Financial Literacy Curriculum

PwC Digital Fitness App
PwC Earn Your Future Classroom

Sign up today at https://app.pwcfdfnearnyourfuture.org/