



CUNA Project Management eSchool

Improving Your Project Outcomes

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Leadership & Employee Development Workshops
Coaching/Consulting
Assessments/Diagnostics
Teambuilding/Team Development
Culture, Engagement, Retention
Talent Strategy/HR Optimization
Online Learning Development

We use data and a scientific approach
to talent optimization to help
individuals, teams, and organizations
achieve more.

Session 4

Improving Your Project Outcomes

Your project success relies on smooth execution and continuous improvement. This session will guide you in how to work a project plan successfully from start to finish. It will provide you with tools and practices to effectively communicate through the project, close a project, sustain its results, and identify lessons learned to enhance your future project outcomes.

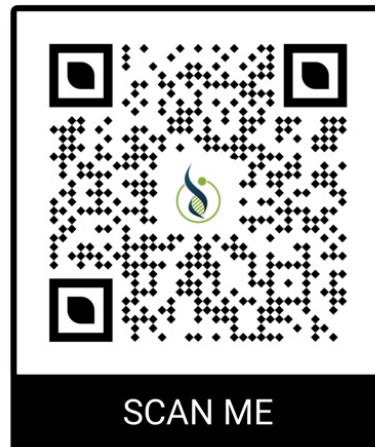


Session Logistics



Resource Page for You!

<https://www.aspiretalentgroup.com/cuna-pm-eschool-jan22/>



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Quick Review!



Navigating common challenges

- Time Constraints
- Scope Creep
- Decision-making time and approval process
- Unexpected risks/de-railers

Please rank which of these common project management challenges you experience most frequently, second, etc.?

Time constraints/Time
management on a project

Scope creep

Decision-making challenges-
clarity of approvals, time

Unexpected risks/other
de-railers

Start the presentation to see live content. For screen share software, share the entire screen. Get help at pollev.com/app

Estimating Project Schedule



TIPS:

Add 15% time for project management tasks

Add contingency time per project complexity and risks



Determining Task Duration

The total effort for the task broken into days/hours

Example: Building a Fence in your Backyard

Estimated total effort = 30 hours (the number of estimated work hours to build the fence)

Estimated duration =

- 3 days if you work on it 10 hours a day
- 6 days if you work on it 5 hours a day
- 10 days if you work on it 3 hours a day

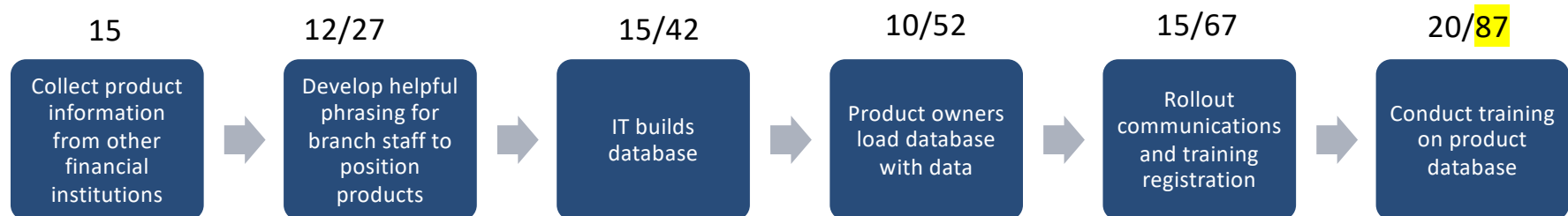


3 Benefits of Defining the Critical Path

- It identifies the most important tasks that need to be closely managed and those tasks that are less important but can result in competing resource conflicts
- It clearly identifies interdependent tasks and sequences needed to meet the deadline
- It helps with project monitoring by being able to compare planned with actual times

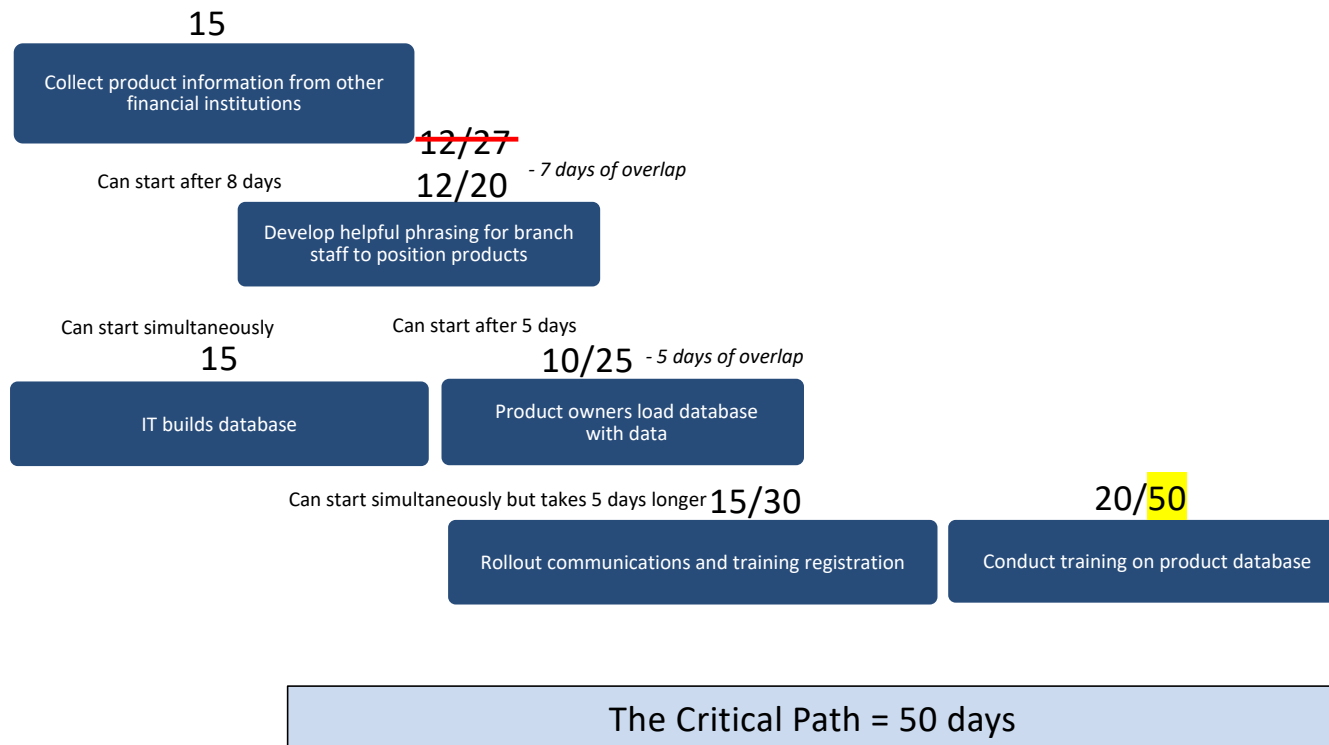
Determining the “Critical Path”

Add task durations together

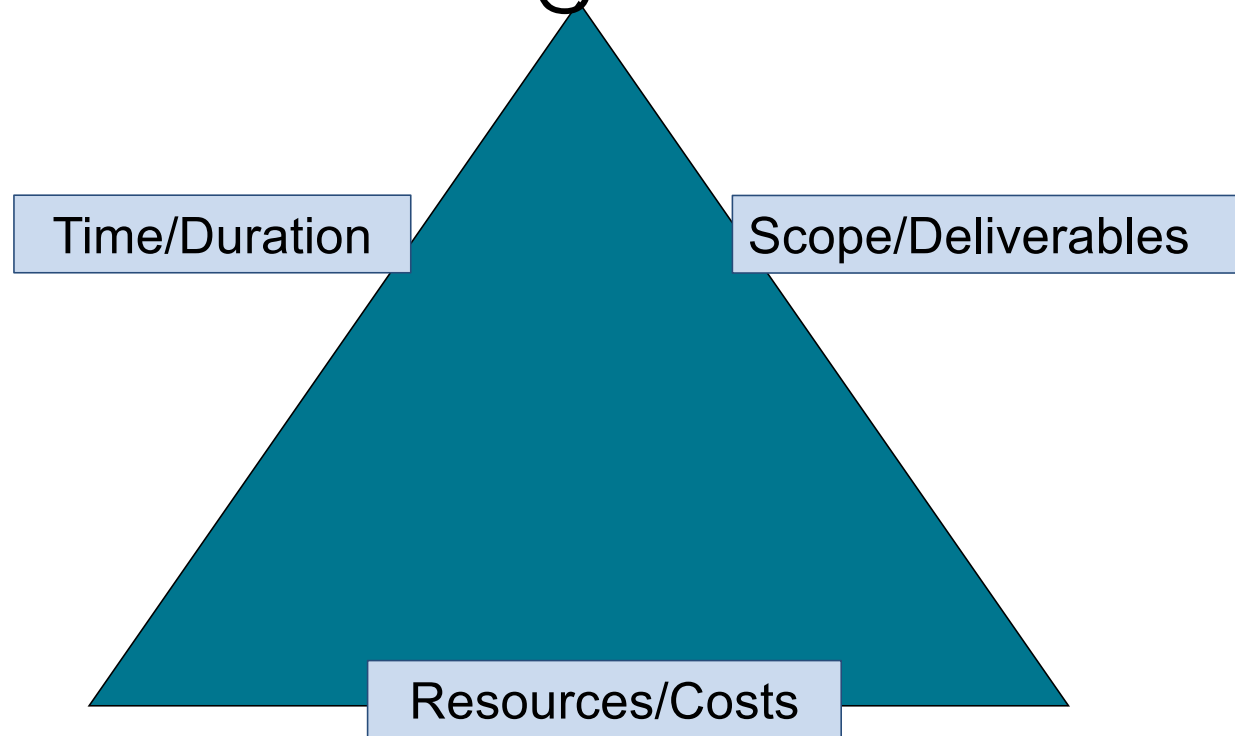


- Are there any tasks that can overlap, i.e. be worked on simultaneously?
- Are there any tasks that are dependencies, i.e. can't start until the previous task is completed?

Determining the “Critical Path”

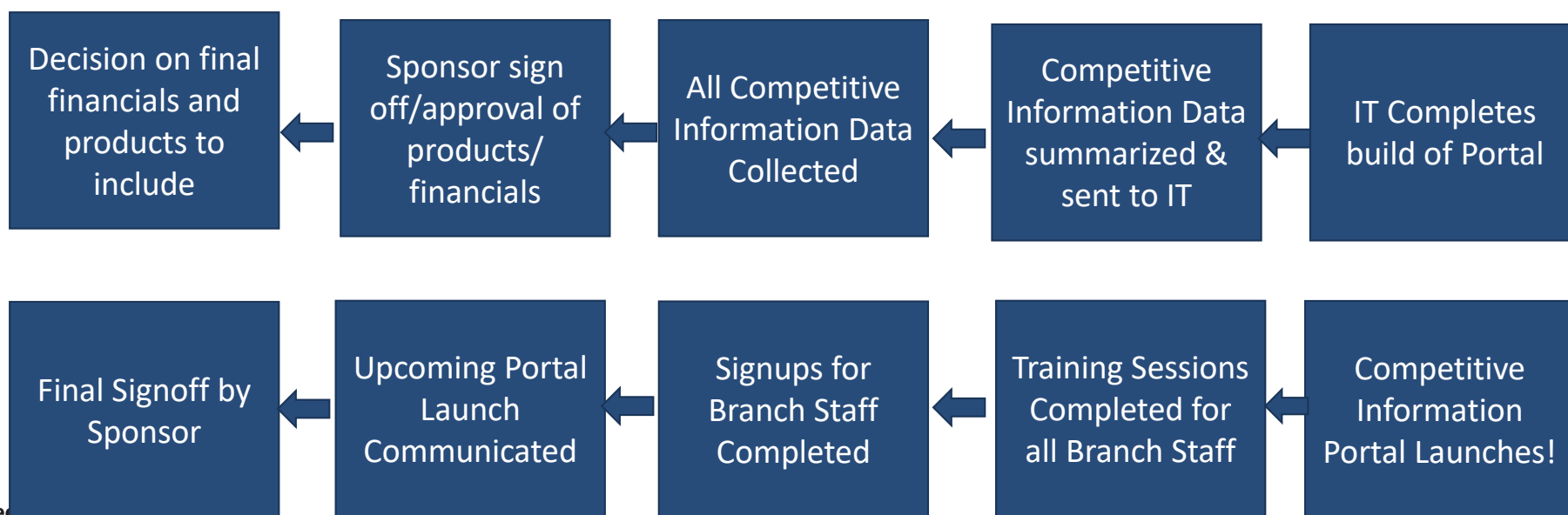


Triple Constraints: Project Management Triangle



If you have a project with a hard deadline, begin with the end in mind

*Break it down and work backwards from deadline!



Project Name:

Risk Identification & Mitigation Plan

Potential Risk:	Likelihood of Happening L_M_H	Severity of Impact L_M_H	Potential Mitigation Strategies

During



- Conducting ongoing project team meetings and check ins
- Implementing your plan to achieve the project goals/deliverables
- Monitoring any key dependencies/related projects
- Navigating barriers, obstacles, and risks
- Managing scope and resources
- Keeping project charter and project plan current
- Monitoring, measuring, and reporting on progress
- **Managing project communications**

Improve your project outcomes through effective project communications



Define channels and frequency of project communication on front end in charter



Schedule regular project meetings/check ins in advance- use “huddles” where appropriate



Agree on the set of tools everyone will use for managing the project, i.e. agendas, meeting minutes, weekly project update reports, etc.



Make it easy i.e. set up project address group, schedule/send calendar reminders when information is needed, etc.



Define who is responsible for project communication and tracking-create a role/owner



Create project information hub to house all project-related documents- use good document management practices

Quick Tips: Document management essentials

- Central place defined for all project documents
- Set up directory and sub-folder levels and permissions
- Limit number of people who can edit project charter and WBS/project plan
- Define naming standards and versioning standards
- Label drafts and final approved versions
- Determine maintenance schedule for purging or records retention of outdated documents



Keeping your project on track through effective project communications



Define channels and frequency of project communication on front end in charter



Schedule regular project meetings/check ins in advance- use “huddles” where appropriate



Agree on the set of tools everyone will use for managing the project, i.e. agendas, meeting minutes, weekly project update reports, etc.



Make it easy i.e. set up project address group, schedule/send calendar reminders when information is needed, etc.



Define who is responsible for project communication and tracking



Create project information hub to house all project-related documents- use good document management practices



Create a communication plan for the project –this can be helpful when project involves clients

Communication Plan Template

Target Audience (Stakeholder or Stakeholder Group(s))	Content/Key Messages to Deliver (what information do they need, why?)	Desired Purpose/Outcome (Awareness, Understanding, Buy In, Ownership, Decision-making, Other?)	Communication Method (email, intranet, meeting, presentation?)	Timing/Frequency	Sender (s)	Feedback Mechanism

Sample Project Scenario: Moneymaker Credit Union

Defining Project
Communication Needs



Who are some of the target audiences Zelle needs to communicate with throughout the project or at some point during the project?

Communication Plan Template

Target Audience (Stakeholder or Stakeholder Group(s))	Content/Key Messages to Deliver (what information do they need, why?)	Desired Purpose/Outcome (Awareness, Understanding, Buy In, Ownership, Decision-making, Other?)	Communication Method (email, intranet, meeting, presentation?)	Timing/Frequency	Sender (s)	Feedback Mechanism

Project Charter Template:

Project Title:	
	<input type="checkbox"/> Research/Recommendation <input type="checkbox"/> Implementation

Project Players:

Corporate Sponsor:	
Project Manager:	
Team Players/Roles:	
Stakeholders:	
Other Key Players:	

Project Definition:



Definition of Current State:	
Background/Business Reason for Project:	
Project Purpose/Goals/Objectives	
Anticipated Project Scope/Deliverables (What "Done" Looks Like):	
Anticipated Business Impact:	

Project Schedule:

Estimated Project Launch Date:	
Project Delivery Target Date:	
Key Milestone Target Dates:	
Project Team Meeting Schedule:	

Inter-related Projects:

Anticipated Project Risks:

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Project Costs:

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Project Signoff/Approval Process:



Scope Changes	
Final Deliverables	

Project Communication/Training Plan:



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Closing a
project...

Project Close

- Formal approval/signoff of project deliverables
- Transition the solution to support, i.e. determine maintenance/sustainability plan
- Implement post implementation communication/change management plan
- Determine measurement/tracking/reporting plan to determine if project benefits were achieved
- Celebrate with project team!
- Conduct project closure review and evaluation

Transition to Maintenance & Support

Project: Competitive Information Portal

Maintenance /Support Plan

Approval Process for Changes/Updates:

Assigned product owners can update product information as defined. CC: to project manager & sponsor

Process for Identifying Updates Needed:

- Link on intranet page for branch employees to report out of date product information
- Maintenance schedule for ongoing updates by product

Updates Maintenance Schedule

Content/Tool/Resource	Owner: Person accountable for updates	Maintenance Schedule/Frequency
Mortgage Product Information-rates, fees, etc.	Christine	Monthly
Checking Account Product Information	Jeannie	2x year: by Jan 15 th and July 15 th
Auto Loan Product Information	Jeff	2x month on 1 st and 15 th
Updates needed to our top competitor financial institutions?	Tracy	Annually by Jan 15 th

Communication Process for Distributing Updated Information:

Intranet announcement done by product owner when new/updated product information has been added

Post implementation communication & change management plan...

What are some actions we can take to
gain greater adoption/use of this new
tool by branch staff?



What actions can we take to encourage use/adoption of this new tool?

A

Awareness of the need for change

D

Desire to make the change happen

K

Knowledge about how to change

A

Ability to implement new skills and behaviors

R

Reinforcement to retain the change once it has been made

Prosci

Brief Description of the Change:	Rate	Notes
Awareness of the need to change?	5	The branch employees understand we are losing business to competitors and have been seeking information on how to position our products and services. They “buy in” to the need for this tool, thus have score high on awareness of the need for the change being implemented.
Desire to make the change happen?	5	Branch employees want the new information and embrace the idea of this tool.
Knowledge about how to change?	4	The branch employees know where to access the tool and how to use it.
Ability to change?	2	Branch employees now have the information at their fingertips for how we compare, as well as sample phrasing, but they are not yet comfortable having the product discussion with the members. They need additional practice using the phrasing
Reinforcement to retain the change?	3	Announcements and contests are rolling out so there is high visibility for the new tool, however we need a plan to both train the product conversation skills and reinforce those skills through coaching from branch managers

The first score of 3 or less = the Barrier Point and must be first area addressed for change to be successful.

Current Change Self-Reflection

What is the change?

Based upon your chosen change fill in the evaluation section and assign a rating for each area on a scale of 1 (low) to 5 (high).

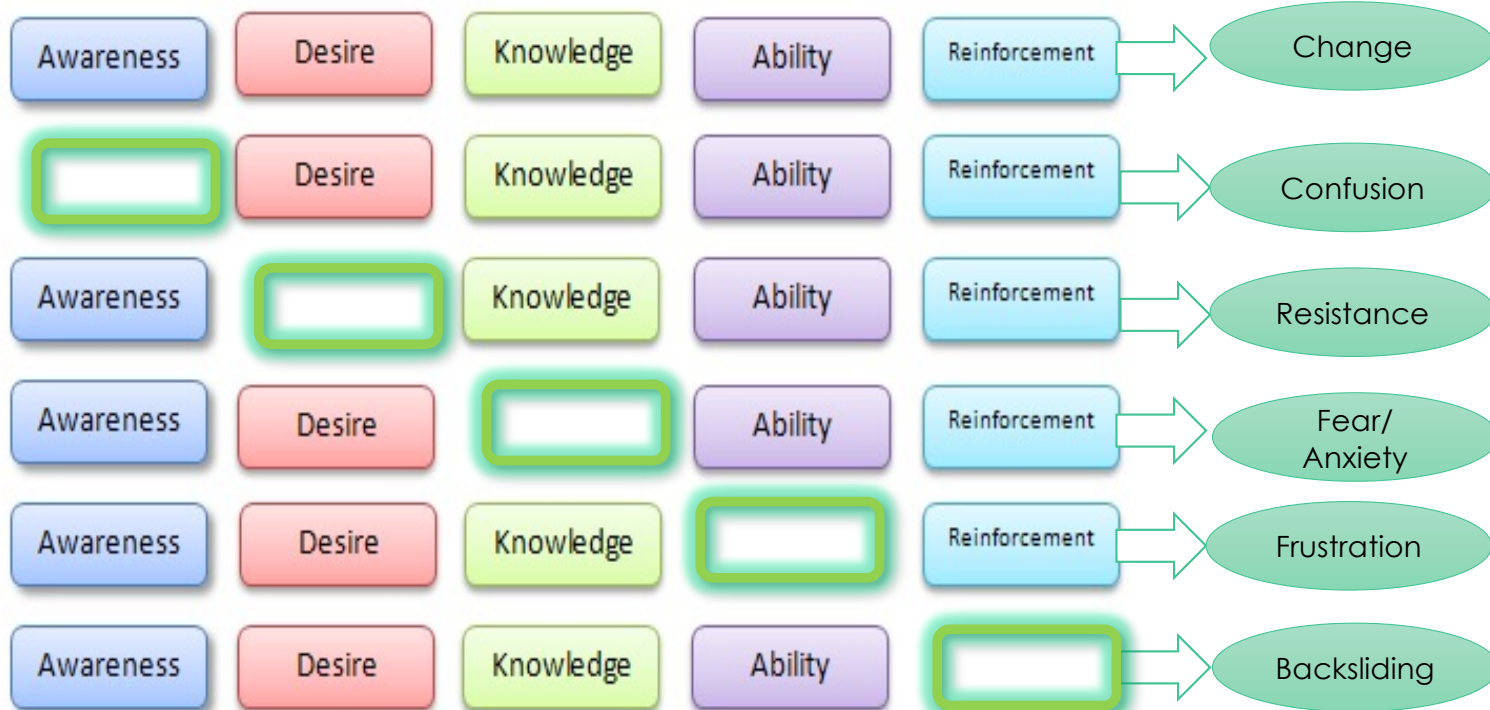
	Evaluation	Rating (1) low – (5) high
Awareness	List the reasons you believe the change is necessary:	Rate your level of awareness for the need for change:
Desire	List the factors or consequence (good and bad) that create a desire for you to change:	Rate your level of desire to make the change happen:
Knowledge	List the skills and knowledge needed for the change:	Rate your level of knowledge about the change:
Ability	Considering the skills and knowledge identified in the previous level, evaluate your current ability to perform these skills or act on this knowledge:	Rate your level of ability to change:
Reinforcement	List the reinforcements that will help to retain the change. Are incentives in place to reinforce the change and make it stick?	Rate your level of commitment to actions that will reinforce the change

The first score of 3 or less= _____

This is the **Barrier Point** and must be the first area addressed for the change to be successful.

13

Missing ADKAR



Project Closure Review & Evaluation



- What lessons were learned during this project that should be captured and applied to future projects?
- What worked, what did we do well?
- What didn't work, what could we have done differently?
- What changes would we make if we conduct a similar project in the future?
- What lessons learned could be shared with other project teams?



Post Project Review & Evaluation-Continuous Improvement

For discussion with project team, sponsor, and key stakeholders:

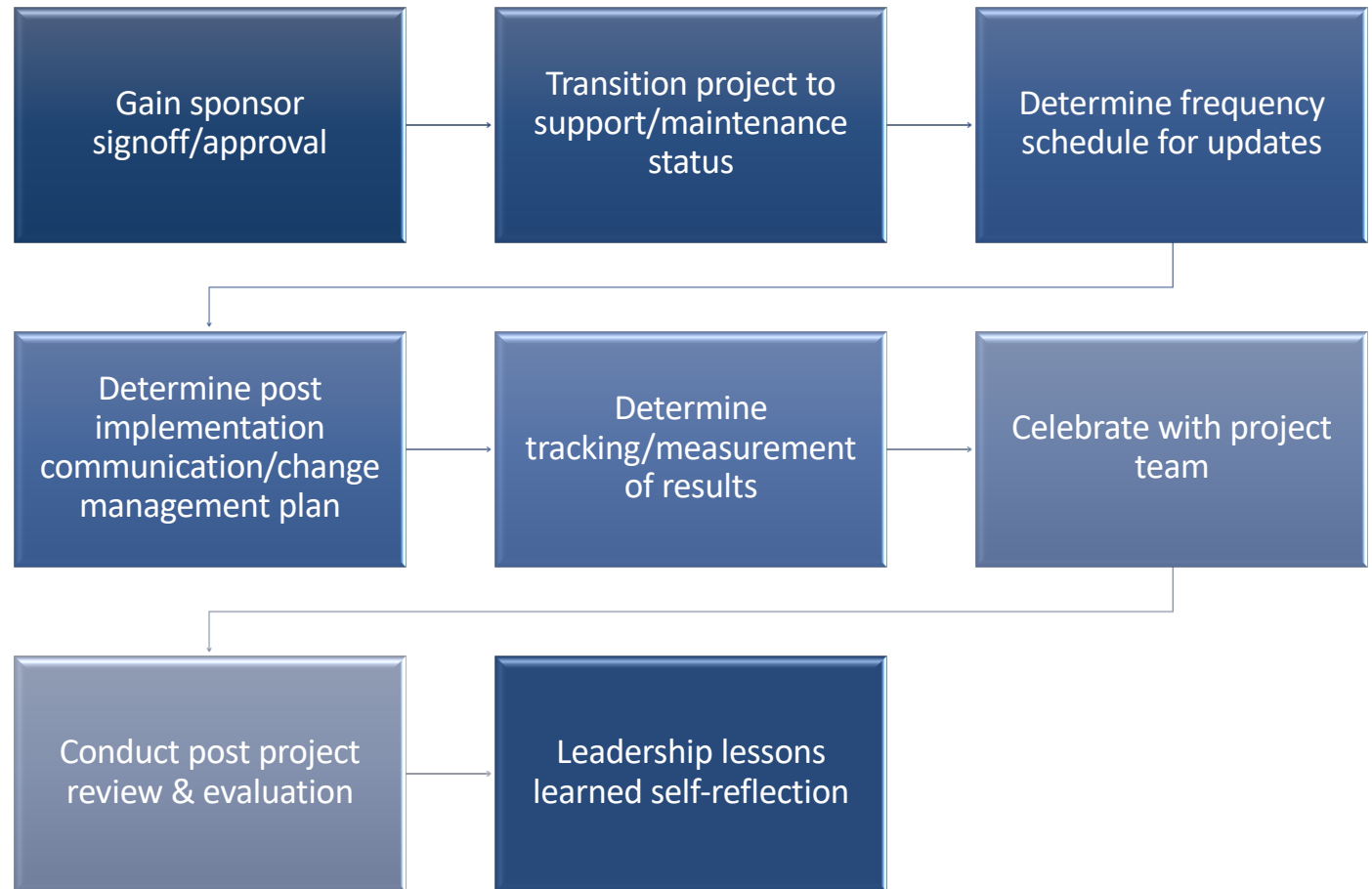
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Whew! Project
Completed
Successfully!

Almost!

Project Close Tasks/ Milestones





Leadership lessons learned....

SWOT Analysis: My Project Leadership



<p>Strengths: What went well? Where was I most effective in leading the project and project team?</p>	<p>Weaknesses: What might have gone better? Where was I least effective in leading the project and project team?</p>
<p>Opportunities: Where/what/how could I improve my project management or team management skills going forward? What steps will I take? What will I do differently next time?</p>	<p>Threats: What are the implications/how will this be a barrier to my success if I don't continue to build these skills and make improvements?</p>



Tidbits and
Takeaways!

Project Management Trivia!



Please share one learning takeaway or helpful tool/tip from today's session....



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