CUNA Solutions User Forum
Tools for your Project Management Toolbox

Credit Union National Association (CUNA)

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1

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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*.

2

Defining Project Management

The application of knowledge, skills, tools and techniques to project activities in order to meet project requirements.

PMBOK® Guide and Standards, Project Management Institute

Projects have a beginning and an end. If it doesn't have an end, it isn't a project.

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3

3

The Numbers Tell the Story

- 70% of organizations have suffered at least one project failure in the prior 12 months (KPMG)
- 29% of projects are mostly or always completed on time (Wellingtone)
- 75% of companies say that they lack confidence when it comes to project success. (Geneca)

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4

4

Slide 5

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- Too many projects running at once
- Everything is urgent and "on fire"
- Lack of clarity on project goals and outcomes needed
- Frustration with heavy demands on project leaders and teams
- Unclear roles and responsibilities
- Short timelines and rushing causes mistakes and rework
- High project failure rate, i.e. missed timelines, unmet goals and outcomes, over budget

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- Competing projects are prioritized so they have the appropriate resources to be successful
- Each project has clear goals, purpose, and needed outcomes defined
- There is clarity on projects roles, i.e. who is responsible for what tasks
- Ability to spot potential problems in advance before they occur
- Scalability and repeatability of project success
- Higher success rate for projects, i.e. on time, on budget, achievement of needed results

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5

5

Slide 6

What's in it for you to build project management skills?

- More effective at getting things done in your personal and professional life
- Improve your leadership of your department/team by applying principles for managing the work effectively
- Reduced stress on yourself and others through better planning and execution
- Gain credibility and accelerate your career by being a professional who gets results!

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6

6

Upfront definition & planning is a key to success!

For every 1 hour spent in planning, it saves approximately 20-100 hours in more efficient project execution!

• Determine business case/need for the project
• Determine project goals and outcomes needed
• Determine timelines and resource needs
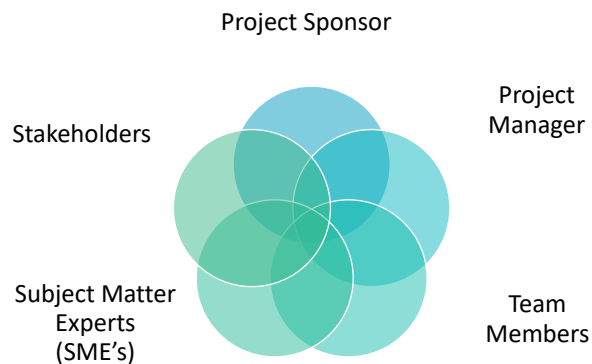• Determine project team roles

7

7

Defining Key Project Roles:

Project Sponsor

Stakeholders

Project Manager

Subject Matter Experts (SME's)

Team Members

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8

8

How to determine the Project Sponsor

- Who requested the project?
- Who has the authority over the project?
- Who can define what success looks like?
- Who has the authority to remove barriers and obstacles?
- Who has the authority to make decisions when project team members or stakeholders don't agree?
- Who will approve the final outcomes of the project?

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9

Project Manager

- Works with sponsor and project team to define project scope, goals, and deliverables
- Develops and implements project plan
- Coordinates project activities/tasks
- Monitors and tracks progress and milestones
- Manages, leads, and coordinates project resources
- Makes improvements, solves problems, or takes corrective action when problems arise

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10
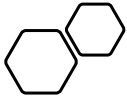
- Core Project Team
- Subject Matter Experts

11

Identifying stakeholders

The PMBOK Guide describes a stakeholder as an individual, group, or organization that may be affected by or perceive itself to be affected by a decision, activity, or outcome of a project.

Who has a vested interest in the outcomes of your project?

Who is directly or indirectly impacted in some way?

Who will use the project's deliverables/outcomes?

12

12

6

Project Success
Tool #1:
Sponsor/Stakeholder
Project Definition
Resource

13

Key Sponsor/Stakeholder Project Definition Questions

- How does this project support the mission of the department, division, and/or company?
- **What problems/pain points do you see this project solving?**
- In what ways will this project solve the problems?
- Which of these problems is the most important to solve?
- What happens if this project is not done?
- **What will be different after this project is completed?**
- **What specifically do you expect the project team to create or implement to consider the project completed?**
- **If the project team could accomplish just one thing, what would that be?**
- What do you think could go wrong with this project?
- What are the major risks to the project's success?
- What suggestions do you have regarding how the project team should approach its job?
- What concerns you most about this project?
- **What does "DONE" look like?**
- **How will you measure success for the project?**
- When this project is officially completed, what will make you say: "This project was right on target?"

14

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Key Sponsor/Stakeholder Project Definition Questions

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15

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Project Success
Tool #2:
Project Charter

16

Project Charter:

- Clearly defines **why** the project is being done, i.e. background, business case, expected outcomes/deliverables.
- Project Charter is presented to Sponsor for approval, becomes the foundation of the project.
- Charters remain **flexible**, changing documents as the project progresses. Milestones, scope, timeframes, resources often change throughout the project.

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17

Project Charter Template:

Project Title:

☐ Research/Recommendation ☐ 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:

Project Costs:

Project Signoff/Approval Process:

Scope Changes	
Final Deliverables	

Project Communication/Training Plan:

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18

When do I need to do a project charter?

- Factors to consider
  - Size of project:

  3 or more people meeting 3 or more times over 3 or more months

  - Experience level of project manager
  - Complexity/business criticality of the project

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19

19

Project Success
Tool #3:
Project Plan/Work
Breakdown Structure

20

Project Plan/WBS

- Defines the phases, sequence, tasks, owners, and time frames for a project
- Can be simple or extremely detailed—many projects can be managed in Excel
- Other visual tools can also provide view of project work (GANTT charts, PERT charts, etc).

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21

Sample Gantt Chart

	WEEK 1	WEEK 2	WEEK 3	WEEK 4

Write Landing Page Copy
Approve Page Copy
Review Landing Page Design
Build Landing Page
Code Review Landing Page

Write Promotional Email
Design Promotional Email
Send Promotional Email
Analyze Campaign Results

Plan Agenda for Meeting
Reserve Room
Finalize Presentation
Approve Presentation
Create Invitations

Rewrite Online Calculator
Code Review Calculator
Update Messaging
Publish Calculator

0   5   10   15   20   25   30   35

Days of the Month

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22

22

Project Plan Template/WBS

	A	B	C	D	E	F	G	H

Project Team Name

Key Milestones/Tasks	Task Breakdown	Owner/Primary Acctblty	Target Completion Date	Contingencies/Dependencies	Status Red/Yellow/Green	Completed date	Notes/Comments

23

You're Ready to Launch Your Project!
Conduct the Kickoff/Launch Meeting

- Introduce roles and responsibilities of team members
- Review project charter, i.e. background, purpose, goals, outcomes, deliverables,
- Discuss timeline/approach
- Set schedule for ongoing project team meetings
- Determine common place to share project-related documents
- Begin tracking meeting outcomes and accountabilities

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24

Project Success
Tool #4:
Agenda & Meeting
Minutes Template

25

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Agenda & Meeting Minutes Template

Project Team Name:
Date of Meeting:

In attendance:		
Absent:		
Meeting Goals:		
Agenda Items:	Owner/Facilitator	Decisions/Action Items/Owners
Parking Lot Items		
Next Meeting Date/Time/Location:		

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26

26

- Who gets to make the final decisions?
- Who needs to approve changes?
- Why do we keep revisiting decisions already made?
- I forgot why we made the decision to do it that way!

27

28

Project Success
Tool #5:
Decision Log

29

Project Name:

Decision Log			
Date	Decision Made	Background:	Approver/Status

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30

30

Project Closure Review & Evaluation

Continuous Improvement

- 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?

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31

31

Project Success
Tool #6:
Post Project Review &
Evaluation

32

33

Tools/Resources for You!

- CUNA Solutions User Forum (June 2022) - Aspire Talent Group

34

Want a "deeper dive into building your project management skills?

Look for CUNA's Project Management eSchool!

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35

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36