

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Using Project Management Principles in Academic Research

29 Jan 2016
Network for Research Professionals

Lori Evarts, MPH, PMP, CPH
 Public Health Leadership Program



Topics

- Academic Research
- Project Management Definitions
- Project Management Tools
- Planning Activities
- Topics to Discuss within Your Project Efforts



Lori A. Evarts ©2016 ALL RIGHTS RESERVED

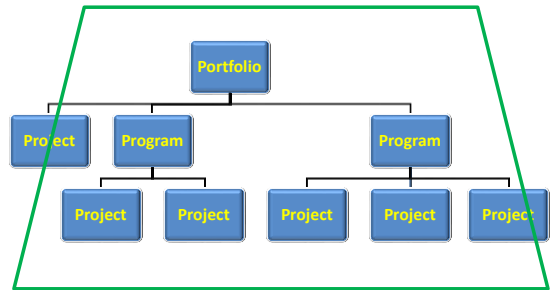
Academic Project Success

- Enumerating the project charter
- Defining roles and responsibilities
- Applying PM knowledge and skills
- Right-sizing PM tools and techniques
- Employing leadership skills
 - Soft skills
 - Management skills
 - Organizational awareness
- Fostering the effective team model



Lori A. Evarts ©2016 ALL RIGHTS RESERVED

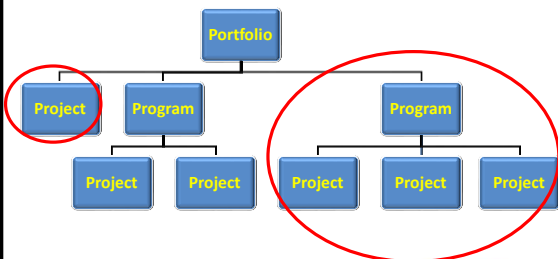
Portfolio, Programs & Projects



Lori A. Evarts ©2016 ALL RIGHTS RESERVED



Portfolio, Programs & Projects



Lori A. Evarts ©2016 ALL RIGHTS RESERVED



So, what is a project?



Building the Biltmore Mansion
 ➤ a definite beginning and an end

- Breakfast
 - Unique
- Projects create a unique outcome, product, service or result



Lori A. Evarts ©2016 ALL RIGHTS RESERVED



Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Project Management Defined

Project Management is the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

2013 Project Management Institute.
A Guide to the Project Management Body of Knowledge
(PMBOK Guide) – Fifth Edition



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Management Defined

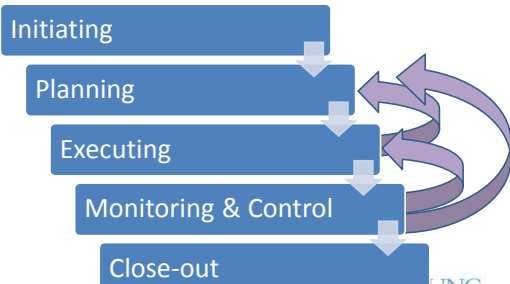
Project management is accomplished through the appropriate application and integration of the 47 logically grouped project management processes...

2013 Project Management Institute.
A Guide to the Project Management Body of Knowledge
(PMBOK Guide) – Fifth Edition



Lori A. Everts ©2016 ALL RIGHTS RESERVED

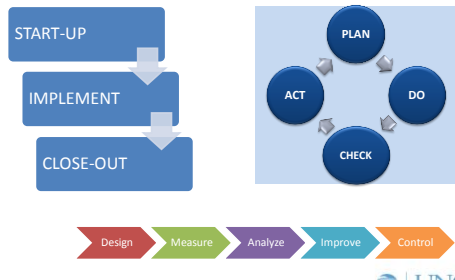
PMI's Project Lifecycle



Lori A. Everts ©2016 ALL RIGHTS RESERVED



Other Project Lifecycles

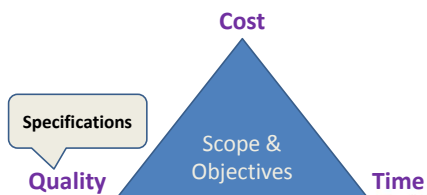


Lori A. Everts ©2016 ALL RIGHTS RESERVED



Project Initiation

- Authorization to begin
- Triple constraint scope definition

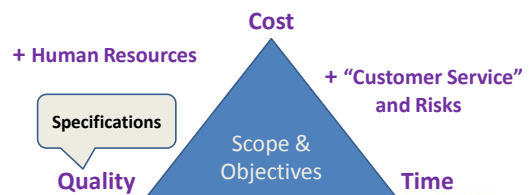


Lori A. Everts ©2016 ALL RIGHTS RESERVED



Project Initiation

- Authorization to begin
- Initial scope definition



Lori A. Everts ©2016 ALL RIGHTS RESERVED



Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Project Initiation CONTINUED

- Commitment of financial resources
- Identification of stakeholders
- Project manager confirmed

➤ Project charter developed & approved

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Initiation

➤ Project charter developed & approved

RFP Posted → Letter of Intent Accepted → Proposal Awarded → Quality Improvement Project Authorized

- Authorization to begin
- Initial scope definition
- Commitment of financial resources
- Identification of stakeholders / funders
- PI and/or Co-PIs confirmed / qualifications, eligibility
- Project Management confirmed

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Charter

- I. Project Title and Description
- II. PI, Project Manager/Coordinator and Authority Levels
- III. Objective(s)
- IV. Business Case
- V. Project Description & Key Deliverable(s)/Outcome(s)
- VI. Signed and Approved by Sponsor

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Charter

Documentation of the:

- I. Project Title and Description
- II. PI, Project Manager/Coordinator and Authority Levels
- III. Objective(s)
- IV. Business Case
- V. Project Description & Key Deliverable(s)/Outcome(s)
- VI. Signed and Approved by Sponsor

WHAT
WHO
HOW
TIME

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Guidelines & Procedures

- Governance
- Requirements
- Committee
- Technical specifications

WHAT
TIME

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Guidelines & Procedures

- Stakeholders
 - Sponsor, PI, PM, Team
 - Department
 - Patients
- Process
 - Regulations
 - Standard of care
 - Research protocol

WHO
HOW

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Thinking about Who

Proven Keys to Success

- Roles and Responsibilities
 - Identify and document
 - Confirm availability and capability
- Delegate with authority
- Share a Common Language
 - Clarify acronyms



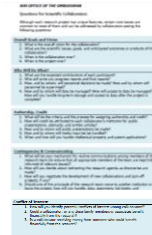
Lori A. Everts ©2016 ALL RIGHTS RESERVED

Thinking about Who

NCI's Collaborative Agreement Template

<https://ccrod.cancer.gov/confluence/display/NIHOMBUD/Collaborative+Agreement+Template>

- ✓ Overall goals and vision
- ✓ Who will do what
- ✓ Authorship, Credit
- ✓ Contingencies & communicating
- ✓ Conflict of interest



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Typical Principal Investigator Tasks

- Identify project/research question
- Convene co-PIs
- Determine Primary Aims
- Confirm plans with sponsor
- Others?



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Typical Project Management Tasks

- Identifying requirements
 - What, how, who, when, process, team
- Addressing stakeholders needs, expectations
- Establishing and maintaining communications
- Managing stakeholders to meet project requirements
- Balancing project constraints
 - Scope, quality, schedule, budget, resources, risks
- Identify and managing change requirements
- Others?



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Research Roles at UNC

Principal Investigator

- Responsible for the overall proposal preparation, and administrative, technical and fiscal management of sponsored project/s.
 - Management of the project within funding limitations, adherence to reporting requirements and ensuring that the sponsor is notified regarding a change in project status or significant conditions that may affect the sponsored project.
- <http://research.unc.edu/offices/sponsored-research/policies-procedures/section-200/policy-4/>

Project Manager

- The person assigned by the performing organization to lead the team that is responsible for achieving the project objectives.

Project Sponsor

- A person or group who provides resources and support for the project and is accountable for enabling success.



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Use Resources to Get Underway

- Colleagues & Mentors
- Project Management Institute PMBOK® Methodology
<http://www.pmi.org/PMBOK-Guide-and-Standards.aspx>
- Free templates and examples <http://www.pmdocuments.com/>
- Chris Croft's 12 Steps to Managing a Project Successfully in "Project Management Simplified" access via UNC Lynda.com <http://its.unc.edu/carolinas-lynda-com-portal/>



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Wise Time Investments

- Research Portfolio Documentation
 - Vision
 - Programs
 - Projects
 - Aims
 - Collaborators & Teams
- Communication Plan
- Communication Strategy



Lori A. Everts ©2016 ALL RIGHTS RESERVED

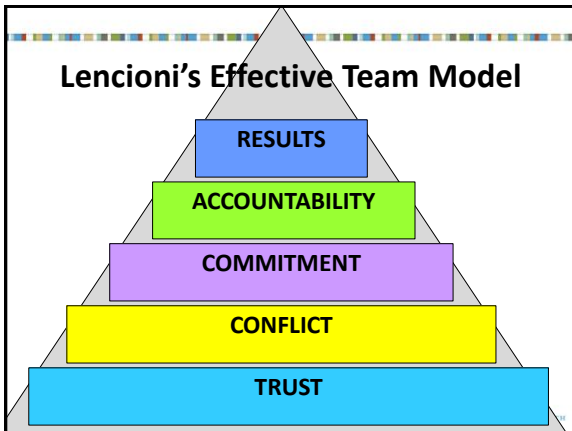
Communication

- Most powerful leadership tool
- Foundation of project success
- Internal communications
- External communications
- Transparent
- Various methods
 - Regular team meetings
 - Emails, one-on-one meetings, reports, etc.

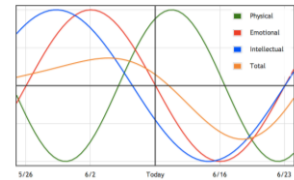


Lori A. Everts ©2016 ALL RIGHTS RESERVED

Lencioni's Effective Team Model



Team Formation & Individuals

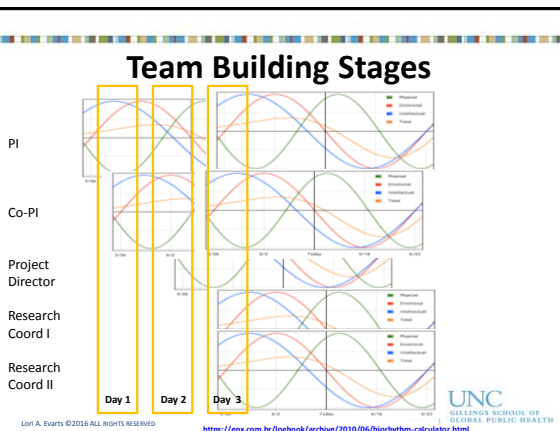


<https://epk.com.br/logbook/archive/2010/06/biorhythm-calculator.html>



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Team Building Stages



Lori A. Everts ©2016 ALL RIGHTS RESERVED

<https://epk.com.br/logbook/archive/2010/06/biorhythm-calculator.html>

Team Building Stages



- Defining
- Clarifying
- Working together
- Maintenance & renewal
- Concluding

- FORMING
- STORMING
- NORMING
- PERFORMING
- ADJOURNING

- ❖ Roles & Responsibilities
- ❖ Individual strengths & experience



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Another Wise Time Investment

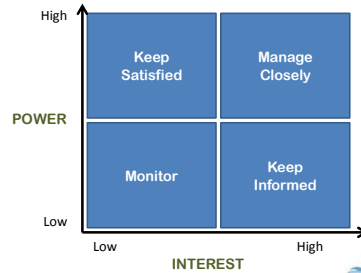
- Need to Identify Stakeholders
- Internal & External



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Stakeholder Analysis

PM Best Practice



PMBOK, Fifth Edition, Project Management Institute, 2013



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Another Wise Time Investment

- Need to Identify Stakeholders
- Internal & External
- Clarify their Communication Requirements
 - Frequency
 - What
 - Who provides



Lori A. Everts ©2016 ALL RIGHTS RESERVED

EXAMPLE: Stakeholders & Communications

Who will receive the information? (Who is the audience?)	What information will the audience receive?	From whom will they receive the information?	When will they receive the information?	How will the audience receive the information?
Project Sponsors (Consulted, Informed)	Progress reports/ meeting minutes	Project team	After standing in-person meetings	Blackboard Team Page
• Lori Everts, John Hight, PhD, Clinical Assistant Professor	Completed assignments	Project team	Assignment due dates	Blackboard Grades
	Peer evaluations	Project team	After submission of assignment and by peer evaluation due dates	Survey Monkey
Project Team (Responsible, Accountable, Consulted, Informed)	Assignment information and parameters	Lori Everts	When assignment is made available and after notes are assigned	Blackboard
•	Google Doc for brainstorming	Documents Manager		Google Doc, Email
•	Meeting agendas	Project Manager	All standing in-person meetings	Email
•	Status updates	Project team	Throughout assignment lifecycle	In-person meetings, Google Doc, Email
	Formatted deliverable for final review	Documents Manager	Thursdays at 9 pm before assignment due dates	Email
	Feedback on completed assignments	Lori Everts	After assignments are submitted	Blackboard
	Lessons learned	Project team	After assignments are submitted	In-person meetings, Email
To Whom	What	From	When	How
Classmates (Informed)	Completed assignments	Project team	After assignment due dates	Blackboard, in-class presentations

Lori A. Everts ©2016 ALL RIGHTS RESERVED



EXAMPLE: Stakeholder Management Strategy

Stakeholders	Most Important	Definition of Project Success	Stakeholder Importance	Greatest Challenge
Sponsor	Long-term financial project success, in large part due to happy clients	Strong client uptake and satisfaction	Financial project support	Lack of specific program knowledge
Project Manager	High project quality, executed on schedule and budget. Also, strong client uptake.	High project quality, executed on schedule and budget. Also, strong client uptake.	Project leader / team morale and support	Lack of specific program knowledge
Health Coach	Accurate and effective program content in order to impact employee behavioral change.	Quality of final project deliverable - presented well and effective in making clients' employees healthier	Subject-matter expertise	Serving as the only subject matter expert - managing accurate content incorporated by other team members
Intern 1	Positive internal receptivity to final project deliverable in order to make strong impression	Strong internal support / receptivity	Content "packaging and delivery" - creative expertise	Lack of specific program knowledge
Intern 2	Positive internal receptivity to final project deliverable in order to make strong impression	Strong internal support / receptivity	Content "packaging and delivery" - creative expertise	Lack of specific program knowledge
Clients	Ease of program roll-out / implementation and strong employee uptake/receptivity	Program available on schedule and is of high quality	We're only as happy as our clients are happy	Time constraints - program must allow for simple implementation



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Stakeholders

- Those involved in program or organizational operations
 - staff, managers, subcontractors
- Those served or affected
 - patients, families, customers
- Potential users of findings or products
 - funders, leaders, coalition members
- Anyone who has an interest in the project effort, outcomes, products or results



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Reasons to Engage with Stakeholders

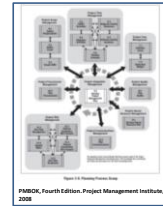
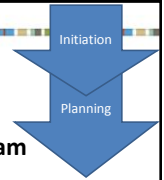
- Build commitment for action and support
- Promote trust
- Gauge satisfaction
- Identify risks
- Clarify stakeholders' goals/products/questions



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Planning

- Generate scope
- Establish process → Network diagram
 - Define activities, resources, duration
 - Develop schedule
- Determine budget



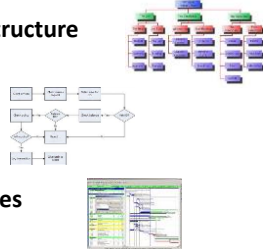
PMBOK, Fourth Edition, Project Management Institute, 2009



Lori A. Everts ©2016 ALL RIGHTS RESERVED

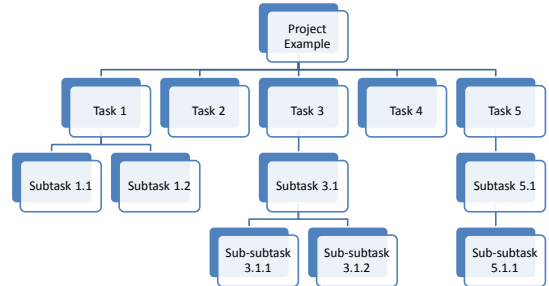
Project Management Tools

- Work breakdown structure (WBS)
- Network diagram / Process mapping
- Schedule & estimates
- Indicators
 - SMART goals



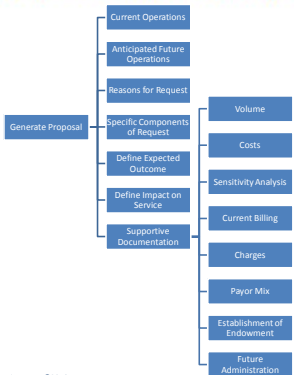
Lori A. Everts ©2016 ALL RIGHTS RESERVED

Simple WBS



Lori A. Everts ©2016 ALL RIGHTS RESERVED

High Level Scope Example: Proposal to Fund 3rd Helicopter for Pediatric Team



Lori A. Everts ©2016 ALL RIGHTS RESERVED

WBS Example



Lewis, Page 227



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Another WBS format

- 1.00 Yard Project
 - 1.10 Cleanup
 - 1.11 Pick up Trash
 - 1.12 Bag Grass
 - 1.13 Hedge Clippings
 - 1.14 Haul to Dump
 - 1.20 Cut Grass
 - 1.21 Mow Front
 - 1.22 Mow Back
 - 1.30 Trim Work
 - 1.31 Weeds at Trees
 - 1.32 Edge Sidewalk
 - 1.40 Prepare Equipment
 - 1.41 Put Gas in Equipment
 - 1.42 Get out Hedge Clippers
 - 1.50 Trim Hedge



Lori A. Evarts ©2016 ALL RIGHTS RESERVED


WBS Development Guidance

- Decompose activities to individual tasks
 - Identify tasks to level that can be
 - Managed
 - Assigned
 - Time assigned
 - Does not show order
- ✓ Good Team Building Exercise



Lori A. Evarts ©2016 ALL RIGHTS RESERVED



WBS Common Mistakes

- Unilateral planning
- Ready-fire-aim (rush to get started; no plan)
- Planning in too little detail 
- Planning in too much detail
 - Stay at level you can control – a day or week
- Failing to plan for risks
 - Review and rework time
 - Time overruns
 - Team member turnover



Lori A. Evarts ©2016 ALL RIGHTS RESERVED

Project Management Tools

- Work breakdown structure (WBS) 
- Network diagram / Process mapping 



Lori A. Evarts ©2016 ALL RIGHTS RESERVED

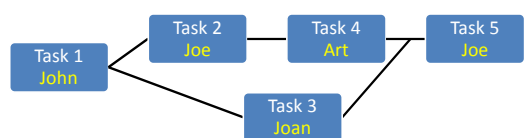
Network Diagram

- Task 1 can start immediately
- Task 2 can start after task 1 is completed
- Task 3 can start after task 1 is completed
- Task 4 can start after task 2 is completed
- Task 5 can start after task 4 is completed and task 3 is completed



Lori A. Evarts ©2016 ALL RIGHTS RESERVED

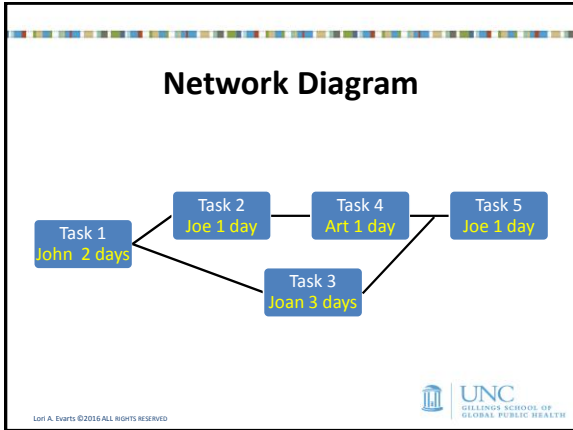
Network Diagram



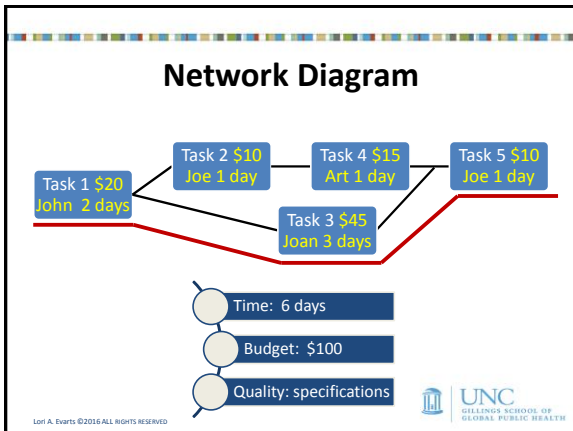
Lori A. Evarts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals



- ### Network Diagram
- Team:
 - Amy \$15/day
 - Jim \$15/day
 - Joe \$10/day
 - John \$10/day
- Lori A. Everts ©2016 ALL RIGHTS RESERVED



PM Tools

- Work Breakdown Structure (WBS)
- Network Diagram/ Process mapping
- Schedule & estimates

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Schedule

Task Name	Days	Predecessors	Resource	Start	Finish
Task 1	2		John	22-Oct-12	23-Oct-12
Task 2	1	2	Joe	24-Oct-12	25-Oct-12
Task 3	3	2	Joan	24-Oct-12	26-Oct-12
Task 4	1	3	Art	27-Oct-12	28-Oct-12
Task 5	1	4,5	Joe	29-Oct-12	30-Oct-12

Task 3 – Jim rather than Joan
Task 4 – Amy rather than Art

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Microsoft Project

Task Name	Duration	Start	Finish	Predecessors	Resource Names
HPM Example	6 days	Mon 10/22/12	Mon 10/29/12		
Task 1	2 days	Mon 10/22/12	Tue 10/23/12		John
Task 2	1 day	Wed 10/24/12	Wed 10/24/12	2	Joe
Task 3	3 days	Wed 10/24/12	Fri 10/26/12	2	Joan
Task 4	1 day	Thu 10/25/12	Thu 10/25/12	3	Art
Task 5	1 day	Mon 10/29/12	Mon 10/29/12	4,5	Joe

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

How much detail ?

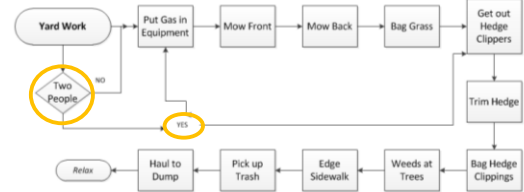
- What needs to be managed?
- Steps to complete?
- By who?
- Key intermediate steps/milestones?



Lori A. Everts ©2016 ALL RIGHTS RESERVED

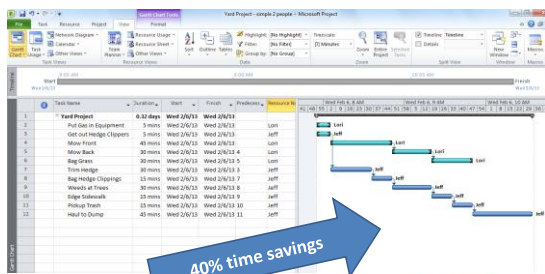
Process matters

Example includes decision step and multiple paths



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Now parallel activities are possible



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Management Tools

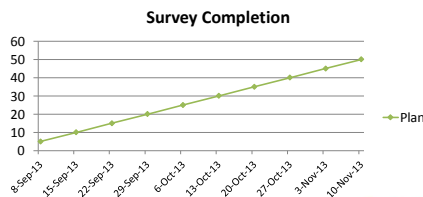
- Work breakdown structure (WBS)
- Network diagram / Process mapping
- Schedule & estimates
- Indicators
 - SMART goals



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Management Tools

- Indicators
 - SMART goal: 50 surveys completed by 10Nov2013



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Another Key: Risk Management Process

- Identification
 - ❖ Cause → Risk → Effect
- Analysis
 - ❖ Probability
 - ❖ Impact
- Response planning
 - ❖ Avoid, Transfer, Mitigate, Accept
 - ❖ Exploit, Share, Enhance, Accept



Lori A. Everts © 2015 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Another Key: Risk Management Process

Simple Risk Analysis Tool

Step 1: Review scope with Team

Step 2: Identify & document risks

Identified Risks

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Lori A. Everts © 2015 ALL RIGHTS RESERVED

Another Key: Risk Management Process

Step 3: Assign Owner

Step 4: Prob. & Impact

Step 5: Determine response

Step 6: Establish actions & triggers

Project Initiation thru Close-out

Identified Project Risks

ID #	Risk	+/-	Owner	Probability	Impact	Type of Response	Action to be Taken
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

Lori A. Everts © 2015 ALL RIGHTS RESERVED

Another Key: Risk Management Process

Step 7: Regularly monitor & update plan

PUBH 784: Project Management Strategy & Practice
Project Risk Management

Risk Management Plan
Updated: 2/26/2012

ID #	Risk	+/-	Owner	Probability	Impact	Type of Response	Action to be Taken	Outcome
1.	No volunteers to staff the booth	-	Lori	Med/High	High	Mitigate	Check with Class/Wed April 11 th , Prepare materials for posters and self-service activity & educational materials; Set-up table before leaving town (or see if Ego volunteers agree to set-up table)	
2.	Supplies from Staples arrive late	-	Lori	Low	High	Mitigate	Order placed Monday April 9 th	Arrival scheduled for Wed Apr 11 th
3.								
4.								

Lori A. Everts © 2015 ALL RIGHTS RESERVED

Another Key: Risk Management Process

Risk Analysis: No matter how you do it – just do it – throughout the life of the project.

Lori A. Everts © 2016 ALL RIGHTS RESERVED

Project Planning

continued

- Define project quality
- Obtain team members
- Establish project communication plan
- Undertake project risk management
- Identify external resources/services

➤ Project plan developed

Lori A. Everts © 2016 ALL RIGHTS RESERVED

Testimonial

- I'm leading a small community-based participatory research study which has attracted some interest from social work grad students, so it's no longer as much of a solo endeavor, and I'll definitely need to exercise project management principles and tools!
- I'm at the coffee shop this morning, hammering out a work breakdown structure and network diagram, to come up with the project timeline/schedule. Also putting together training materials, including a project overview statement -- so grateful to have these skills!! Risk log and communication register to follow. I can't imagine how I would have gone about this previously (well, I can, but it isn't pretty...)
- I loved providing my comprehensive, detailed project schedule to the faculty advisor I'm working with last night, in the form of a slick Excel table which also incorporated a role assignment matrix (columns), based on my WBS and network diagram. Feeling capable!!

Lori A. Everts © 2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Project Execution

- Implement the project plan
- Perform quality assurance
- Develop and manage project team
- Distribute information
- Manage stakeholder expectations
- Secure external resources/services
- Communicate, document & report

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Execution

continued

- Deliverables
- Project communications
- Change requests
- Project documentation updates
- Team performance assessments

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Important consideration: Project Changes

- Document
- Evaluate options
 - Discuss
 - Develop recommendations
 - Generate change order
- Gain written authorization
- Update Project Planning documents
- Communicate approved/disallowed change

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Important consideration: Project Changes

- Document
- Evaluate options
 - Discuss
 - Develop recommendations
 - Generate change order
- Gain written authorization
- Update Project Planning documents
- Communicate approved/disallowed change

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Monitoring & Controlling

- Monitor & control project work
 - Planned versus actual
- Perform change control
- Verify & control scope
- Control schedule
- Control costs
- Communicate

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Monitoring & Controlling

continued

- Perform quality control
 - Per Guidelines, Policies, etc.
- Report performance
 - Metrics
- Identify, monitor & control risks
 - Potential issues
 - Resolutions, adjustments
- Conduct procurements

Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

How to monitor ?

- Actual status of work compared to plan
- Deviations from plan & why
- Corrections needed
- Establish metrics to evaluate constraints



Lori A. Everts ©2016 ALL RIGHTS RESERVED

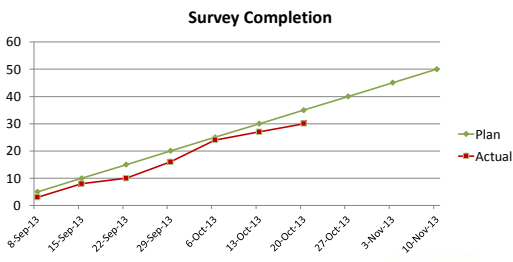
Indicators to Monitor & Control

- Planned vs Actual:
 - Progress work complete in relation to time
 - Budget spent in relation to time
 - Quality of products, outcomes, results
 - Status of change orders
- Stakeholder satisfaction
- Progress reporting



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Example: Survey Completion

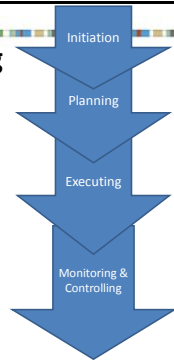


Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Monitoring & Controlling

continued

- Accepted deliverables
- Project document updates
- Change requests
- Quality control measurements
- Validated changes & deliverables
- Performance reports
- Accepted deliverables
- Procurement documentation

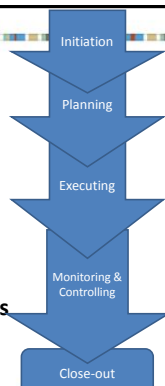


Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Close-out

- Obtain formal acceptance
- Lesson learned
 - Conduct
 - Document
 - Disseminate
- Close out procurements and systems
- Archive relevant project documents

➤ Final product, service or result



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Use Project Management Principles in Academic Research



Project Management

- Knowledge
- Skills
- Tools
- Techniques
- Lessons Learned



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Using Project Management Principles in Academic Research

29 Jan 2016 - Network for Research Professionals

Recommendations

- Use guidance documents & templates
- Establish WHAT – project charter & quality specifications
- Define WHO – **project roles/responsibilities** & stakeholders
- Clarify HOW – process, resources & key deliverables
- Generate SCHEDULE
- COMPARE – planned vs actual
- DOCUMENT
- COMMUNICATE



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Apply PM Tools & Techniques



- Guidelines
- Policies and Forms
- Training
- Templates
- Project Lessons
- Advice from Colleagues



Lori A. Everts ©2016 ALL RIGHTS RESERVED

Project Manager

- Achieve project objectives
 - Apply general management proficiencies
 - Apply project management best practices
- Required characteristics
 - Knowledge, Skills, Performance, Leadership
- Not all PIs have the time and skills to be an effective Project Manager
 - **Know when to delegate the role & responsibility**



♦**PM: balance technical & interpersonal skills**



Lori A. Everts ©2016 ALL RIGHTS RESERVED

“Good fortune is what happens when opportunity meets with planning.”
– Thomas Edison



Lori A. Everts ©2016 ALL RIGHTS RESERVED

“Good fortune is what happens when opportunity meets with planning.”
– Thomas Edison

...AND includes a project management approach to effectively build & leverage project resources !
– Lori.



Lori A. Everts ©2016 ALL RIGHTS RESERVED

References

- A Guide to the Project Management Body of Knowledge (PMBOK® Guide) - Fifth Edition. (2013). Newtown Square, PA: Project Management Institute.
- Croft, Chris (2015). “Project Management Simplified” access via [UNC Lynda.com](http://www.lynda.com)
- Grove, Andrew. (1995). High Output Management. New York, NY: Random House.
- Kendrick, Tom. (2006). Results Without Authority. New York, NY: American Management Association.
- Lencioni, Patrick. (2002). The Five Dysfunctions of a Team: A Leadership Fable. San Francisco, CA: Jossey-Bass.
- Lewis, James P. (2005). Project Planning, Scheduling & Control, 4th Edition. New York, NY: McGraw-Hill.
- Wysocki, Robert K. (2014). Effective Project Management: Traditional, Agile, Extreme, 7th Edition. Indianapolis, IN: Wiley Publishing, Inc.
- Everts, Lori A. (1975 – present©)



Lori A. Everts ©2016 ALL RIGHTS RESERVED