

# Project Management Guidelines: Basic elements summarized



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# Purpose of this document

- ▶ This document was prepared in the context of discussions about ensuring the successful execution of strategic initiatives
- ▶ The information contained herein summarizes my own approach to managing strategic initiatives. It was created based on methodology taught by the Project Management Institute, tailored to specific projects and resources.
- ▶ The purpose of this document is to serve as a guideline for leaders who wish to implement light yet results-focussed governance of strategic projects.



# Pre-Launch Phase



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# Project Charter

- ▶ A Project Charter is an **initiating document** that defines the project's purpose, identifies objectives and provides the project manager the **authority** to undertake the project. It is also a communication tool.
- ▶ It has 5 basic elements:



- ▶ A good article can be found here:  
<https://www.linkedin.com/pulse/20140320191215-6552025-the-basic-project-charter-the-right-thing-the-right-way/>



# Sample Project Charter

PROJECT CHARTER FOR _____	
<b>Project Statement:</b> What issue are we trying to solve? What's the impact of the project? To whom?	<b>Project Scope &amp; Costs:</b> What's included in the project? Excluded?
<b>Goal Statement:</b> What will be achieved? How? By When?	<b>Anticipated Benefits:</b>
<b>High-Level Milestones:</b>	<b>Anticipated Issues &amp; Risks:</b>
Project Kickoff: ( <i>date</i> ) Project Launch: ( <i>date</i> ) Project Completion: ( <i>date</i> )	
<b><u>Team Members:</u></b>	
<b>Project Sponsor:</b>	<b>Project Lead:</b>
<b>Project Members:</b>	



# Project Planning Phase



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# Project Execution Plan

- ▶ Proper planning is a key component of successful execution of any initiative.
- ▶ A project execution plan can be done either with:
  - ▶ a detailed project schedule (Waterfall) or
  - ▶ using “Scrum” methodology
- ▶ In either case it is **essential** to have:
  - ▶ A clear and accountable project leader
  - ▶ An objective which is formally stated and measurable
  - ▶ A list of tasks with clear owners for each task
  - ▶ Regular progress reviews with the project leader and with the sponsor



# Project Execution Plan: Scrum Methodology



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# Scrum Method

- ▶ Scrum methodology focuses on speed of execution through daily communication
- ▶ The Scrum Board is used as a visual, “live” project management tool

## METHODOLOGY (simplified)

- ▶ Step 1: Identify all tasks on post-it notes. Place them in the “to-do” column.
- ▶ Step 2: Assign tasks to team members. Their name is placed on the post-it. It is placed in the “in-progress” column.
- ▶ Step 3: the Project Leader holds a 15-minute debrief in front of the scrum board every day to follow up on tasks & to remove obstacles



# Project Execution Plan: Waterfall Method



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# Project Execution Plan: Waterfall Method

- ▶ Classic Project Management methodology is linear, dependency-based
- ▶ The project schedule should identify all tasks, their order, owner, completion status, and owner

## WATERFALL PROJECT PLAN (simplified)

Reference: Tewaotohni'sakta Mandate & Roles Document, June 2017.

Proposed Schedule of Key Activities	Activity Owner	Status	Q1 2017						
			APRIL						
			2	9	16	23	30	7	14
Communicate Mandate objectives, brainstorm potential initiatives & requirements	Lead: Dir. E&T Support: CEO, Consultant	Complete							
Review ongoing initiatives (Start-Stop-Continue)	Lead: Dir. E&T Support: CEO, COO								
Prioritize & select initiatives for 2018/19	Lead: Dir. E&T Support: CEO, COO								
Align Budget and Organizational structure with 2018/19 initiatives	Lead: Dir. E&T Support: CEO, COO, HR, Finance								
Cascade 2018/19 initiatives to team, identifying a clear leader for each	Lead: Dir. E&T Support: CEO, COO, HR, Finance								
Define SMART objectives for each initiative & individual	Lead: Dir. E&T Support: CEO, COO, HR, Finance								
Develop Program Plans & KSMS for each 2018/19 initiative	Lead: E&T Team Members, as assigned	Ref. Annual							



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# Weekly Meetings

- ▶ Weekly meetings are held by the Project Leader with the Project Sponsor to provide a status update, to highlight progress, and to define next steps
  - ▶ The Project Sponsor is responsible for helping the Leader remove obstacles
  - ▶ The Project Sponsor must set expectations and provide coaching & information
  
- ▶ A Weekly Project Meeting template is on the next page
  
- ▶ An excellent article by the Project Management Institute on holding productive weekly meetings can be found here:  
<https://www.pmi.org/learning/library/secrets-running-project-status-meetings-7009>



# Weekly Project Update Meeting Template

<b>Project Title:</b>	<b>Project Lead:</b>	<b>Project Deadline:</b>
<b>Current Task:</b>	<b>Task Owner:</b>	<b>Task Deadline:</b>
<b>Progress since last week:</b>	<b>Wins &amp; Issues:</b>	<b>Issue Resolution Plan:</b>
<b>Activities for next week:</b>	<b>Anticipated issues:</b>	<b>Issue Resolution Plan:</b>



# Monthly Project Updates

- ▶ A Balanced Scorecard should be reviewed with the Project Sponsor and Senior Management to provide a bird’s-eye view of progress
  - ▶ “Balanced” because several aspects of the project are weighed in determining success
  - ▶ “Actual” and “Target” boxes can be green (meeting target), or red (short of target)

Project Name: _____				Monthly Results		Annual Results	
Levers	Measurable KPI	2018 Target	Comments	Actual	Target	YTD Actual	YTD Target
Quality							
Productivity (or Schedule)							
Human Development							
Stakeholder Management							
Cost							



# Other Considerations



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## Other elements to consider

- ▶ **Stakeholder management** is a key component of managing projects, especially when external parties need to be involved/made aware/convinced of the benefits of the project. We often manage stakeholders in an informal, ad-hoc way. However, for complex or sensitive projects, a stakeholder management plan is required to identify supporters and detractors, and to communicate effectively.
- ▶ Depending on the criticality and complexity of the project, a **Risk & Opportunities Management Plan** may be required to define and track mitigation plans or to harness potential opportunities.
- ▶ The internationally-recognized Project Management Institute provides formal training and tools at <https://www.pmi.org/learning/training-development>





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