

“Managing Projects is as easy as 1, 2, 3”

A Simple Project Management Process



The 1, 2, 3 of Managing Projects

1. Manage Single Projects
2. Manage Many Projects
3. Evolve Project Management

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects
 1. Initiate the Project
 2. Manage the Project
 3. Close the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

1. Get Project Approval

- Ensure approval for the project is in place

2. Decide the Project Management Process

- Decide what project management sub-processes are needed (e.g. project charter, risks, tasks, issues, etc.)

3. Setup the Project site

- Find, copy and modify a suitable project site to re-use to manage all the project artifacts and communications

2. Manage the Project

3. Close the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects
 1. Initiate the Project
 2. Manage the Project
 1. Plan the Project
 2. Work on the Project
 3. Track and Re-Plan the Project
 3. Close the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects
 1. Initiate the Project
 2. Manage the Project
 1. Plan the Project
 1. Define the project
 2. Setup work notifications
 3. Assign the work
 2. Work on the Project
 3. Track and Re-Plan the Project
 3. Close the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

1. Plan the Project

1. Define the project

1. Complete the Project Statement - also known as the Project Profile / Project Charter / Project Definition
2. Setup Tasks – perhaps a simple task list or maybe a Microsoft Project like WBS (work breakdown structure)
3. Define the other project management sub-processes
 - Create or update the rest of the lists (i.e. sub-processes) in the project site, e.g. goals, teams, issues, deliverables, risks, etc.

2. Setup work notifications

3. Assign the work

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

1. Plan the Project

1. Define the project

2. Setup work notifications

1. Enable immediate email notification on all new work assignments

2. Setup easy to find "My Work" reports / dashboards

3. Setup scheduled emails with nudges for upcoming or late work

3. Assign the work

2. Work on the Project

3. Track and Re-Plan the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

1. Plan the Project

1. Define the project

2. Setup work notifications

3. Assign the work

1. Assign roles - If using project roles, assign out the work to the persons holding the specific roles for this project

2. Assign project management sub-processes - Cycle through the lists and assign work (doing a check for any unassigned work items)

3. Check resource loading - Find and fix any over allocations due to the new work assignments

2. Work on the Project

3. Track and Re-Plan the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

1. Plan the Project

2. Work on the Project

1. Find work

2. Do work

3. Update progress on work (recording any issues)

3. Track and Re-Plan the Project

3. Close the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

1. Plan the Project

2. Work on the Project

3. Track and Re-Plan the Project

1. Check and understand the project's progress

2. Find and Manage Exceptions (e.g. issues, risks and change requests)

3. Re-Plan the project

3. Close the Project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

1. Plan the Project

2. Work on the Project

3. Track and Re-Plan the Project

1. Check and understand the project's progress

1. Virtual Check - Examine the various (project, issue, work, resource) reports on the project site

2. Individual Check - Talk to the Team Members and Customers

3. Team Check - Run periodic project meetings

2. Find and Manage Exceptions (e.g. issues, risks and change requests)

3. Re-Plan the project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

1. Plan the Project

2. Work on the Project

3. Track and Re-Plan the Project

1. Check and understand the project's progress

2. Find and Manage Exceptions (e.g. issues, risks and change requests)

3. Re-Plan the project

1. Re-assign work and send notifications

2. Report to and Work with the Appropriate Stakeholders

3. Tailor the project site to match the evolving methods needed to run the project

The 1, 2, 3 of Managing Projects - Single Projects

1. Plan the Project
2. Work on the Project
3. Track and Re-Plan the Project
 1. Check and understand the project's progress
 2. Find and Manage Exceptions (e.g. issues, risks and change requests)
 3. Re-Plan the project
 1. Re-assign work and send notifications
 1. Project Redefinition - Update the lists in the project site (Project statement; Task List; other sub-processes) with any changes
 2. Project re-assignments - reassign work and again find and fix any over assignments
 3. Notifications - check to ensure that the changes just made are getting out through the notifications mechanisms setup earlier
 2. Report to and Work with the Appropriate Stakeholders
 3. Tailor the project site to match the evolving needs of the project

The 1, 2, 3 of Managing Projects - Single Projects

1. Plan the Project
2. Work on the Project
3. Track and Re-Plan the Project
 1. Check and understand the project's progress
 2. Find and Manage Exceptions (e.g. issues, risks and change requests)
 3. Re-Plan the project
 1. Re-assign work and send notifications
 2. Report to and Work with the Appropriate Stakeholders
 1. Deliver Periodic Status Reports (Printed or emailed)
 2. Raise Exceptions including Project Change Requests, Top Issues and Top Risks
 3. Resolve Sponsor Level Issues and apply the resolution through Re-Plan Project (if appropriate)
 3. Tailor the project site to match the evolving methods needed to run the project

The 1, 2, 3 of Managing Projects - Single Projects

1. Manage Single Projects

1. Initiate the Project

2. Manage the Project

3. Close the Project

1. Run Project Post-Mortem and Track Lessons Learnt

2. Close out the Project site

3. Capture any useful modifications made to the project site for use on future projects

The 1, 2, 3 of Managing Projects - Many Projects

1. Manage Single Projects
2. Manage Many Projects
 1. Setup and maintain a projects structure
 2. Manage across projects
 3. Manage the pipeline of new project requests
3. Evolve Project Management

The 1, 2, 3 of Managing Projects - Many Projects

1. Manage Many Projects

1. Setup and maintain a projects structure

1. Define and document the overall projects and portfolio hierarchy (on PowerPoint or Visio perhaps)
2. Setup the initial projects structure
3. Maintain the projects structure

2. Manage across projects

3. Manage the pipeline of new project requests

The 1, 2, 3 of Managing Projects - Many Projects

1. Manage Many Projects

1. Setup and maintain a projects structure
2. Manage across projects
 1. Check and understand the progress of the many projects
 2. Identify, manage and resolve any escalated exceptions (e.g. issues and project change requests)
 3. Report to appropriate cross-project stakeholders
3. Manage the pipeline of new project requests

The 1, 2, 3 of Managing Projects - Many Projects

1. Manage Many Projects

1. Setup and maintain a projects structure

2. Manage across projects

1. Check and understand the progress of the many projects

1. Virtual check - Examine the various (project status, issue, work, resource) reports

2. Individual check - Talk to the team members and project customers

3. Team check - run periodic project and cross-project meetings

2. Identify, manage and resolve any escalated exceptions (e.g. issues and project change requests)

3. Report to appropriate cross-project stakeholders

3. Manage the pipeline of new project requests

The 1, 2, 3 of Managing Projects - Many Projects

1. Manage Many Projects

1. Setup and maintain a projects structure
2. Manage across projects
3. Manage the pipeline of new project requests
 1. Setup a request management process (maybe a simple list or perhaps a complete site)
 2. Announce the new request process and provide initial assistance to users
 3. Evaluate and approve or reject new project requests

The 1, 2, 3 of Managing Projects - Evolve PM

1. Manage Single Projects
2. Manage Many Projects
3. Evolve Project Management
 1. Define a policy / approach and an approval mechanism for evolving project management
 2. Implement agreed changes (approved by the policy)
 3. Periodically evaluate the success of the project management evolutions policy and re-adjust the change policy as needed

The 1, 2, 3 of Managing Projects - Evolve PM

1. Manage Single Projects
2. Manage Many Projects
3. Evolve Project Management
 1. Define a policy / approach and an approval mechanism for evolving project management
 2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 2. Improve the look and feel of the project management sites
 3. Capture local best practices for reuse
 3. Periodically evaluate the success of the project management evolutions policy and re-adjust the change policy as needed

The 1, 2, 3 of Managing Projects - Evolve PM

1. Define a policy / approach and an approval mechanism for evolving project management
2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 1. Customize the project management processes (in SharePoint lists)
 2. Customize the project management reports (in SharePoint web-parts)
 3. Map navigation to mimic the desired process (using the SharePoint quick launch)
 2. Improve the look and feel of the project management sites
 3. Capture local best practices for reuse

The 1, 2, 3 of Managing Projects - Evolve PM

1. Define a policy / approach and an approval mechanism for evolving project management
2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 1. Customize the project management processes (in SharePoint lists)
 1. Add new project management lists (to include different views, a default view, a set of datasheet views and a logical view sequence)
 2. Tailor existing project management lists using out of the box SharePoint (e.g. add/update columns; workflow)
 3. Tailor existing project management lists using SharePoint customizations / extensions (e.g. tailor list settings for unique referencing or automated email notification, etc.)
 2. Customize the project management reports
 3. Map navigation to mimic the desired process

The 1, 2, 3 of Managing Projects - Evolve PM

1. Define a policy / approach and an approval mechanism for evolving project management
2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 1. Customize the project management processes (in SharePoint lists)
 2. Customize the project management reports (in SharePoint web-parts)
 1. Design (on paper) the project site pages incl. the home page
 2. Add / customize the project site pages incl. the home page
 3. Setup advanced reporting
 3. Map navigation to mimic the desired process (using the SharePoint quick launch)

The 1, 2, 3 of Managing Projects - Evolve PM

1. Define a policy / approach and an approval mechanism for evolving project management
2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 1. Customize the project management processes (in SharePoint lists)
 2. Customize the project management reports (in SharePoint web-parts)
 1. Design (on paper) the project site pages incl. the home page
 1. Identify key reports to include on what pages
 2. Identify key charts and graphs to show on what pages
 3. Identify key icon indicators to show on what pages
 2. Add / customize the project site pages incl. the home page
 3. Setup advanced reporting

The 1, 2, 3 of Managing Projects - Evolve PM

1. Define a policy / approach and an approval mechanism for evolving project management
2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 1. Customize the project management processes (in SharePoint lists)
 2. Customize the project management reports (in SharePoint web-parts)
 1. Design (on paper) the project site pages incl. the home page
 2. Add / customize the project site pages incl. the home page
 1. Add a 3rd level of navigation to SharePoint with a new web-part page and a tabbed web part
 2. Add project management reports and charts via web parts
 3. Configure each report

The 1, 2, 3 of Managing Projects - Evolve PM

1. Define a policy / approach and an approval mechanism for evolving project management
2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 2. Improve the look and feel of the project management sites
 1. Add local logo's to begin the branding of the site
 2. Change to one of the out of the box SharePoint site themes
 3. Design, develop and apply a custom theme to heavily brand the site
 3. Capture local best practices for reuse
3. Periodically evaluate the success of the project management evolutions policy and re-adjust as needed

The 1, 2, 3 of Managing Projects - Evolve PM

1. Define a policy / approach and an approval mechanism for evolving project management
2. Implement agreed changes (approved by the policy)
 1. Build-in the desired project management process
 2. Improve the look and feel of the project management sites
 3. Capture local best practices for reuse
 1. Save lists as templates for reuse
 2. Add customized reports to the report gallery for reuse
 3. Save existing projects as templates in the Templates gallery for reuse
3. Periodically evaluate the success of the project management evolutions policy and re-adjust the change policy as needed