

Sarah Cirone:

Hi everyone, and welcome to today's webinar, ***Practical Project Management***, hosted by HRDQU and presented by Lou Russell. My name is Sarah and I will moderate today's webinar. The webinar will last around an hour, if you have any questions, just type them into the question area on your GoToWebinar control panel and we'll answer them as we can or after the session by email.

Sarah Cirone:

Today's webinar is sponsored by HRDQ consulting, if you're looking for live interactive training classes delivered right to your learners wherever they are. HRDQ's virtual lead instructor training classes allow your learners to keep the training, teamwork and communication going. From a distance, realtime interaction between instructors and classmates provides a powerful learning experience, for performance improvement and cultural shift you need. Learn more at www.hrdq.com/consulting.

Sarah Cirone:

Our presenter today is Lou Russell, the CEO and Queen of RMA. Lou is an executive consultant, popular speaker and respected author whose passion is to create growth and companies by guiding the growth of their people. In her speaking, training and writing, she draws on 30 years of experience helping organizations to achieve their full potential. Lou is the author of seven popular books such as Leadership Training, Training Triage, and Managing Products Projects.

Sarah Cirone:

She has spoken at more than 300 conferences including ATG International and the Society of Information Management, Lou has a BS from Purdue and Computer Science and an MS and Instructional Systems Technology from Indiana. Her business is a certified Women's Business Enterprise and a Project Management Institute partner. It's an honor to have you speaking with us today, Lou.

Lou Russell:

Thank you. I appreciate it very much. That's a testimonial here, just because I've been using HRDQ materials for a really long time. And they're fabulous. I mean, every single detail is there. It's just so well written. You're going to hear a little bit more about the rocket team in a second. But whenever you need something you need to go straight there. Okay, I'm done.

Sarah Cirone:

I appreciate that, Lou. Thank you.

Lou Russell:

Do you want me to go forward from here?

Sarah Cirone:

Oh, yeah, you can take it from here now.

Lou Russell:

Okay, great. Thank you. Well, this is my grown up picture. And if you were here when I had the camera on, you'll see I don't look like that today because we're all hunkered down somewhere. I so appreciate you being here, whether you're here virtually or you're going to listen to this tomorrow or whenever, I really appreciate the opportunity from HRDQ to let me speak with you. I have been doing project management for a very long time, but I have sort of a different take on it than most people do. I teach what I would call practical or realistic project management. I think people make too big a deal about project management.

Lou Russell:

And I want to just show how simple it can be and how easy it can be. One of the games that HRDQ does is called rocket, the project management game. And we use that in all our project management classes. And I'll share more about that at the end as we're talking about it. So, let's get started. I want to and again, you're going to put your answer in that question area. Okay, in the question area, and then we'll be able to see what you're doing. I want you to think about a negative emotion that you experienced during a recent project and it could have been like in the last couple of weeks, there's plenty of negative emotion around that. Name it, there we go. Look, we have overwhelmed, confusion, frustration.

Lou Russell:

Let's see who wins. Let's just keep watching, go by, exhausted, earshot, blah. You guys are having so much trouble with these negative emotions, the comments are fast [inaudible 00:04:15] I love that. I just love that. Okay, excellent. Now, one to 10 how intense was that? Whatever emotion you put in there, 10 being the worst. Okay, so how intense has it been for you? Yeah, 100 good. Okay, they're high. These are very high. Now, I start my project management classes with this. These are extenuating circumstances. I would tell you the 10, we're trying to balance life at the same time, we're trying to balance our projects. Things are crazy right now everybody knows that. What do you think is primarily triggering your emotions right now? Put that in the chat window.

Lou Russell:

What do you think is making you feel nine and 10ish? Yes, for sure. The uncertainty is huge, because that's one of the most difficult things to handle, I think is when you can't say it's going to be over by tomorrow. And then also, many of you are trying to juggle your children, they're all home with you hiding away. And then you're also trying to juggle your work, which is what we're doing right now. Thank you very much for being here. And so, I think it's interesting to me that we keep hearing, everybody's dying for a date, to go. Will it be April 1, or will it be April 15? Or when do we get to stop this? When do we get this to be over? And we can't answer that question.

Lou Russell:

To me, the only thing we can do for this project is to really just be kind to each other, and be nice to each other and work well together. Let's take another look at this. Let's look at it as think of a time before all this happened probably. Think of a time where you had a positive emotion about a project you're working on. What was something? What was a positive emotion? Okay, so what was the positive emotion just name it. Okay, there we go, accomplish, completed, finish, excitement. We can see these go flying by, these are great. Actually, it worked. I think that's some people say. All right, excellent. Those are all fabulous, energized, excited.

Lou Russell:

Can you feel in your body right now how that changes your body? Just repeating those words change your body, so well done. And thinking back again to that happy spot what was your emotion number like 10 being the most intense, the most amazing, and one being the least amazing, I suppose. Okay, and again, we're getting really, really, really strong emotion so which is fabulous. That would lead me to believe that you are people that really care about your work. In both cases of this, the downside and the upside you care about your work, you can see that in these numbers. It's fabulous. So, I appreciate what you do.

Lou Russell:

Somebody put one trigger, I mean, everybody do it, put a trigger now of what made you feel... what happened? How did you end up in this positive situation? Because it's something we need to reflect on right now, anyway. Okay, what happened? What triggered that? What triggered your sense of accomplishment, for example, Dan? Okay, what triggered that emotion? Oh, there you go, I love those Joy. Things going well, cooperation is huge, right? Game on the chat room. There's no chat room, you put him down where it says questions, fabulous, positive change, shared vision. Love that, happy students. Yeah, I proved my hypothesis. That's awesome, excellent.

Lou Russell:

So, we can do both of these things. And we will have both of this in our life. I also teach emotional intelligence. So, sometimes I slide into that, I've been working on one of those decks, right now. Today, this is project management. I got to get back to that, but thank you. And this is what happens in all my classes. When we do these classes, the first thing we do, I start with this, feel free to use any of these exercises, of course. And I asked them, what's the emotion you experienced in your last project and a lot of times they're not good. And it's because the world has made up this thing about how complicated project management is. It's really not. It's really very logical. You can make it horrific. You can buy all kinds of stuff that makes it even harder.

Lou Russell:

But you know what, I'm prone to post it myself. So, anyway, we'll go right through this. And in the meantime, if you have any questions, please feel free. I know my name is going to be out there somewhere but it's Lou L-O-U. Russell, R-U-S-S-E-L-L @Moser, M-O-S-E-R-it.com. If you have any additional questions, please remember that, I'm there. I'm sitting out, in the background just like you are. So, love to chat. Here's what we're going to go over, there's just four phases of project management in my opinion. And it's actually notice that there's a start and an end.

Lou Russell:

And the start and the end mean project, the project is defined because the way you define a project is that it has a beginning and an end. That's going to be different than a process that we're going to talk about a little bit later. There's four phases defined, plan, manage, review, that little mnemonic at the top there to properly manage resources, that's just to help you remember, define, plan, manage review. Grab a pen so you can make a couple of notes on this. One of the things I want you to realize is when you do define, define answers the question why, why are we doing this project instead of something else? And when we finished the define phase, we actually have a project charter.

Lou Russell:

The artefact that comes out of that define phase is a project charter. And I'm going to show you a template, we're going to send you a template for this as well. It's already down there in the handouts but the project charter is amazing, because it's the thing that everybody skips. And if you do that well, it's a little bit of, get yourself together before you jump in, so that once you learn how to do a project charter, your projects are going to be just amazingly better. So, you're gonna love this. It's real simple. Remember, define is about why are we doing this and it's artifact is the project charter. And then the plan, which everybody is used to doing a plan, in fact, most people by accident, start with the plan.

Lou Russell:

You never want to start with the plan because you put dates in the plan, and people will hold you to dates and if you did it at the beginning, you didn't know what you were talking about so you're in big trouble. That's the thing. I would call that plan phase how, what's our strategy? What order are we going to do things in? Who's going to work with us? Getting organized, that's what plan is. And at the end, you would have a project plan. Some people call it a project schedule. Now, the next one is manage, and manage is build what you said you were going to build from the project plan. And so, this I call the adapt phase, because you will have to adapt, you'll have to adapt all the time, things will change, don't get mad when things change, we should be used to that right now.

Lou Russell:

We just have to roll with it. So, manage is about adapt, and at the end of the manage, the only way you can get that done is your influence with other people. That's why that big red boxes down there. That's adapt. And basically at that point when that bit's done when managed is done, I call that customer done now. The customer got what they want, but you as the project manager have to sweep up. So, that's what the review is. Review is, you learning about how to do it better the next time. And I call that then project done. Celebrate accomplishments, all that kind of things, whatever you would do. This is a very high level view of the project management, you're just going to do define, plan, manage and review. If you're interested, those little black words under those lines, initiate plan, monitor and review.

Lou Russell:

Those are actually from the PMI PMBOK, and we may talk about that just a little bit. Today, we're going to talk about how you're going to apply these things to your to-do-list. And we have all, I just already mentioned these, we have all four defined plan management view. We're going to spend a little bit of time on Project Charter. We're going to spend less time on project plan probably because that's people already know how to do that but I'm going to give you some tips. And managing review won't take very long either but don't skip review, right? That's where you get to learn. That's super important. Let's start with an example of something. I want you to think to yourself, "What are 10 things on your to-do-list that you should be doing right now instead of being on this webinar?" Just type them in. What are two things that should be on your to-do-list? 10, sorry, I had said two didn't I? 10, 10 things, think about it.

Lou Russell:

All right, that was good. Eat lunch. Okay, good. I didn't really mean for this to make you feel bad, right? This is our to-do-list. We have this to-do-list that we're trying to keep in our secret little book or wherever you keep it. I have my book sitting right here. And if I lose it, I'm giant trouble, excellent job. Everybody's talking about the things that is on their list. These are things they have to get done while they're working and doing all these other things. I would like you to share with me now. Who thinks,

let's go one more over there, I want you to think about if you can remember because I know you typed them in, but think about the ones that you just typed in a little bit.

Lou Russell:

And I want you to look at any that you think you could complete those before lunch, if you were uninterrupted. Let's say... how many of the things, the things that take four hours or less, cross them out in your mind, we're not going to worry about those. Those are the ones that you're just going to cross those right off. Okay, anybody got any of those? Put some in there. They're small, less than four hours. There we go. Yep, calls, maybe it depends. That could go on for days. Follow up with programme coordinator, just checking on people. Okay, perfect. When you are doing these kinds of tasks right here, and notice what it says, "One sitting less than four hours." And it's somewhat arbitrary, but this is pretty straight up. These are tasks and tasks also have a beginning and an end. And they're those things that we write in our little books and we cross them off.

Lou Russell:

Tasks have a beginning and an end. And we just through them. Okay, so the next question, is there any task on there that you can do by yourself? Is there anything in there you could do by yourself on your list? All by yourself without anybody's help. Think about what that would be. What kind of help you would need? You don't have to type it in all the way but you know what I'm saying? All right. If I'm, and somebody put the key word there, if I am getting help with other people, now, I have more complexity. Now, I'm doing a project because I have people, I have dates, I have assignments, those kinds of things. So, one owner, one date, and one task.

Lou Russell:

And people get mixed up and they take those many projects, let's call them. We take those many projects, and we pretend they're a task. And that's why we can never get it done because it's too big. Number one is a lot of little tasks. Number two is the project. That's a project. Now, what about an activity that's been on your to-do-list for less than a month? Okay, anybody have any that have been on the to-do-list for more than a month? Is there anything in your to-do-list that it's just been sitting there forever? Okay, there's some. It's been sitting there forever. Where would we put that? Would we call that a task? Or would we call it a little process? It's probably a little process also, because you just haven't gotten the team together. That's what's making it hang out there.

Lou Russell:

And then, how will you measure that the task is done? If you can't measure the task is done, then you're going to have a tremendous trouble getting any of the project done, you have to have for every single task, how you're going to get that done, and those combined into this project. Now, what email? Do you think... I'm going to give you a third term here, is email a task, a project or a process? What do you think it is? Vote in the window. There you go, a distraction. A pain in the neck, excellent. Okay, so we have all the answers flying by me and they're all different. Email is really a process, because it doesn't end. Remember, a process doesn't end, doesn't have a beginning and it doesn't have an end. Email does not have a beginning and an end.

Lou Russell:

And it certainly does depend how you do it. What happens is we make, as good practitioners, we have to make a process that allows us to check off email. Has a beginning and an end and not let it just fly all

over the place all the time, which is what happens sometimes. It is a process, but we can put things in place to make it so we can get it down to a task level and getting stuff done. So, excellent job. Yes, fabulous. Here are the words we just talked about the task, a unit of work that has a beginning and an end, usually smaller than three hours as we said three hours or less. A project is a collection of tasks that have a beginning and an end. And process is a collection of never ending tasks that repeat again and again.

Lou Russell:

Give me an example of a business process. Type it in the window, in the question window, to get tickets. That's a good one. That is good. That's a good way of doing it. Okay, drug testing, good. That's a process, excellent job. Building cars, excellent. Okay, so you can say like, "Oh, we're building cars, we don't ever have a day where we got, in general, God forbid." We build more cars and more cars, drug testing, I hope and some time, but right now it's definitely a process. It's a collection of never ending tasks that repeat again and again and again. And what happens is let's look at learning and development right now. So, learning and development, when you have a project, you build a new workshop, let's say.

Lou Russell:

That's clearly what of these three, what do you think that is? You build a workshop. It's a project, you build a workshop, you said you were going to build a workshop, you talked to the people, you build the workshop. What comes next? You give it to somebody and it might be you, actually, but you give it to somebody to maintain for the rest of its life maybe. It goes into your course catalogue and it just goes and goes and goes and goes, what's that? Which one of the words is that? It's a process. We get these too mixed up, and what most people don't do very well is once they get the project done, done, we finished it, they just sort of... then they don't really care about it anymore.

Lou Russell:

And it's very difficult to hand off, that usually doesn't go well. Remember that as you're juggling all these different projects all at the same time, that that pathway from project to process is pretty tough, and you have to be pretty intentional about it. You have to take it there. Excellent. Okay, so here's some things I'm not going to really talk about it right now. But you do know and we know at this moment, that the way we handle our email is hard. We have 24 hours a day that emails coming into our box, how much can we really get done? And how do we prioritize that thinking work? How do we differentiate between creativity and innovation and new growth, let's say? And then email, we're just checking it off as fast as we can, or we're going through all our status reports or whatever, all that kind of stuff.

Lou Russell:

We have to have a very intentional way of doing that. Throw some stuff in the chat window. How are you doing that? I mean, right now is a little bit extensive but how are you in general doing that? How are you balancing both that process side and the project side? Block scheduling is excellent. Someone said JR before, which I think is a nice visual tool for seeing what's out there. Lots of lists. Yep. I have my little book, but my book gets out of control too. Does anyone hide? You can just put, yes, if you hide sometimes we don't have to hide now, we're hiding anyway, but that's one of my favorite tricks at work.

Lou Russell:

Or the other thing I could do, is do it on the plane, which that's not working out for me right now either. All right, so scheduling time, excellent. That's an excellent one. Okay, so let's look at the project

manager, I'm going to jump ahead just a tiny bit. And there are two roles only, really, there's three roles in project management, you don't have to get any more complicated than that. The project sponsor, which you can see right here. The project sponsor is the one who cares about return on investment. They're the one that wants, they have made an investment, you've been given a budget, and they are going to be the one that gives you the money, basically. And this is super important and evil, in a way they could care less what you have to do to build your course. They just want the thing done, and they don't want to cost more than this.

Lou Russell:

That's the way it is. That's what a project sponsor is. A project sponsor, think of them as a C-level executive. And though they may very well not be a key level like that, but remember that a project sponsor who's leading, let's say, leading a team and a lot of people are building content or whatever they're doing. They're going to say, "Hey, I want you to have it done by this date, here's your budget, you're the one that knows how to build this stuff, leave me alone." And of course, hopefully, they don't say that it's bad leadership. But that's really what the project sponsor role is. The project manager role, which is probably the role you're going to be doing, the project manager role is you keep them up to date, you deliver them, you work within the strategy, they get just got you. And you basically you're the one creating things like project objectives, to be able to measure and I'm going to show you a template for this in a minute, to be able to measure how this thing is going.

Lou Russell:

It's very important, though, to influence up. A project manager should never go up to a project sponsor and say, "Oh, I don't know what to do. What should I do in this situation?" The project manager should always come to the project sponsor with two concepts, two ideas. I could do this or I could do this. Project sponsors love to choose. They love to go this one, right? Okay, and whatever one they pick, you win. It doesn't matter whether you like that one or not, because they're the project sponsored they on thing. The relationships are very different and we have to be able to keep them straight. Now, let's see if you can throw this in the chat window. Let's see if you can... We're in the question I should say. Who provides status reports to stakeholders? Is it the sponsor or the manager?

Lou Russell:

Who does the part? Okay, good. Who assigns tasks to people? Manager, right. Who determines the business objectives? Yeah, the manager is the business sponsor would be the one. The sponsor is going to do the business objectives, that's the return on investment. Who determines the project objectives? That's the manager again, good, who recommends what to do when money, time or quality are threatened? Recommends? Probably you. The manager, because they don't know what's going on right now. There's too much other stuff going on. And then who gets to be the decider? The decider is the sponsor, exactly. So, great job. It's very important that these are intentionally spelled out for people. So, they don't run into each other. Now, the other part that you want to remember, I call everything else, the stakeholder and the stakeholder are all the other people that if you think about... there's an old book called Orbiting The Giant Hairball.

Lou Russell:

Give me a why in question if you've ever heard of that book. But basically, if you think of the project as a hairball, everything's like flying around it, trying not to get sucked into the hairball not flying out into space. As a project manager, you have your project, you need all these other people to come in and do

their thing. But ultimately, you don't want them to live with you. So, that's that balance. That's what's called a giant hairball and that's what the stakeholders are doing. The stakeholders are the people that are coming in temporarily going back out. We only have project manager, project sponsor, and then everybody else is a stakeholder. Some of what I'm talking about is based on the Project Management Body of Knowledge, which that's their website there. I've got it cooked down more, you probably know that if you'd been in any of the project management stuff that's usually a little deep.

Lou Russell:

But I'm not doing projects to launch rockets like people do in PMI quite often, I'm actually building rocket toys from HRDQ, it's a little bit lower. Let's look at the project charter quickly. There's a lot to this. It's super fun once you get it done. Once you get used to doing this with the template, it should take you less than 30 minutes to do it because actually, every time you do another project, you can kind of copy from that first one is very similar in general. These are the main things that would happen in the define phase. And who remembers, put it in the chat window, who remembers what that word was? What does the define phase? What was the answer there? What was the thing... yes, oh, very good. I hope you've done it. Lots of points. Okay, right. So, that's why are we doing this?

Lou Russell:

Look at the things that makes perfect sense. Set business objectives, establish the scope, set the project objectives, watch out for risks, watch out for constraints, talk to people and establish who's in charge. And I will go over those pretty quickly here. The first one we talked about was business objectives. I like to use the word Iranis, increase revenue, avoid cost and improve service. As I said earlier, why are we spending money on this instead of something else? Okay, so I call it, I sometimes talk about the Greek Goddess Iranis. There's no such thing, I made that up so don't tell other people that. Anyway, do you think any of these could be eliminated? You don't think they're that important. Any thoughts on that?

Lou Russell:

One of these, I'm going to erase. Why would I erase it? Or which one do you think it is? Business objectives are measuring, and the project itself is either going to increase revenue, or drive class from the business or improve service. Okay, someone saying cost, improve service, good you got all of them. You got all of them now. Basically, I would cross out improve service, I do in class generally. Improve service, because if you think about improved service, this is service to either your employees maybe or your customers. You're giving something to someone. And so basically, that's either going to help you make more money, or it's going to avoid the cost of having those employees and usually in L&D, that its cost. I can get rid of improve service because it's really about avoiding cost.

Lou Russell:

When we do training, a lot of our training is about avoiding the cost of the way it's being done now. We can cross that out, we're good. And so, you're really going to ultimately only be left with those two things, avoid cost. Let's see if I can give a little pen here, that will be fun. We're going to get rid of this. Oops, I didn't do it right, hold on. Here we go. I'm going to get rid of this, because it's redundant, we already have it. And then we're going to have any project, is either an increased revenue or avoid cost project, there's no other choice. You're either going to make more money, or you're going to drive cost out of the business. Put what you aren't, and that's a really good question. Someone's saying, nonprofit sector, I still think... I don't know. I think maybe that's sort of a weird combo, isn't it?

Lou Russell:

Everybody else put in for not for profit, they're doing both. They're trying to avoid costs and increase revenue at the same time usually. Put in what you think your projects are. Are they increased revenue one, or they avoid cost? You have to use my words increase revenue or avoid costs. And we should see a lot of avoid costs because I think a lot of us are in the training industry. Now, by the way, what kind of training do you think would be increased revenue that would be in the training industry? Sales, exactly. Good job. Good job. I can just wait all the answers come right out of that little window. It's fabulous. Fabulous. I want you to write right now, some words will kind of overlap a little bit. You don't have to do the first part but you can say, in your mind they're my project and you have to pick one or the other, will avoid costs or increase revenue, which will probably avoid cost as we were saying, by blah, blah, blah.

Lou Russell:

I want you to put the blah, blah, blah, in that question window. What are you going to get? My project will avoid cost by, what are you going to do? Think about the projects you're doing right now. What's your outcome there? If you avoid costs, what's your thing? Delivering what you promised, fee for service system, perfect, perfect. Reducing paper processes. Those are gorgeous, perfect, fabulous. Capture value IP, excellent. That might even be increased revenue, for that one. Okay, excellent job. This is the first thing we have to do when we do the project charter, we have to know what page we're on. Are we going to avoid costs? Are we going to, you know what I'm saying, avoid costs or improve service? Okay, now, this is his scope diagram. And in the scope diagram, let me see. I'm going to read this to you.

Lou Russell:

And I want you to, I'll just tell you the story. This is what we use in our workshops. And we are basically visually drawing a picture of who is on this project and what they do. And it's fabulous. We do this with Post-it, so I have so many pictures of Post-it. It's hilarious. What I want you to note is, start at the top right, the sponsor, the CEO, we're saying that's the sponsor. The sponsor provides governance to the project, the big blue square is the project. And this one I should have, I need to back up. This is a United Way volunteer Day of Caring basically, is what we're working on here. That's what the domain is. The blue square is you, you're the project manager, you're basically the router that is pushing these things in and out to get the project done.

Lou Russell:

You're in there, nobody knows about you, nobody cares. You have to do all the work, but that's basically you, you're in that blue box. You don't even get a cool white box on the outside. That's just the way it is. Sponsor gives governance to the middle, to the project manager, gives the budget and then gets status back. Now, notice that these are very high level and they're also not synced sequenced in any way. They're kind of all happening when they happen. Does everybody get that? And then corporate communications involved, yeah, it's United Way Day of Caring, you want to have pictures and have some street cred there. They get a budget and they get a need from somewhere and then they get a communication plan made and that goes into the project, in the middle, into your part.

Lou Russell:

Then we have employees, well, employees first you have to make sure they're available. And then you do training where you schedule them. And then on catering, what's wrong with catering? Anybody have any ideas there? There's something wrong with catering. Just giving you a fly by on how you read these. Hey, what's wrong with catering? Look at it. We have our... is there anything wrong with those arrows?

Keep thinking. Look, what's going... food is going to the middle project manager. Budget is going to catering. Does that seem right? Yeah, something that seems wrong there. But that could be good. I mean, there's a budget and then food gets sent to people so that seems fine. What's wrong with charities?

Lou Russell:

Yeah, what's wrong with charities? You have volunteers that are going to charities, what do you think is missing there? Yeah, exactly, there's no back arrow. When you learn how to draw these, and we take a day to do this usually in the class. We're doing a speed bump here, but I would want to see another arrow coming from charities into the project. That it might be requests request from the charities, this looks like we're just going to flash mob and show up and just build whatever we want. That doesn't make any sense. Now, the other one I want you to notice this is just a couple of little knits schedule down below, schedule that was going to employees. You see that it has double headed arrows. That is completely against the rules in this diagram. The arrow has to go only one way. That one right here is bad.

Lou Russell:

We would want this, let me see if I can find it. No, I can't find it. Nevermind. But back, okay. Yep. This one right here that, that one has double arrows. They have to make up their mind and which direction do you think it would be down or up? Would be down or up? You see where I am the employee box and there you go. Yep, exactly. It would be down. Moving on, moving on from this. This is the project charter template. And the project charter template had all the things that were on that first, why are we doing this column. And so, you can see on this page, you have a box for the business objectives, you have a box for the project objectives, quick and dirty risks, constraints, deeper risk, you could put your scope diagram, which we just showed a picture of in that project charter as well in that square.

Lou Russell:

And then the next thing, I believe I moved it here is you also have your communication strategy, which is, who do I have to keep in touch with? Who are the people that as project manager, I have to talk to, who are the people? And who gets to how often do I have to talk to them, this is just almost like a little marketing campaign. And then the governance strategy is of all the people that are playing in this project, who gets to change things. And so, you're doing all this really early. Really, really early, right at the start, because if you do this at the end, they won't do it. Everyone fights about it but at the beginning, everyone loves each other so it's perfect. This project charter and let me just bounce back a minute so you can see it again. And you'll see that fallible charter is in the handout's one below, so you have it already.

Lou Russell:

It's two pages, this page and this page, and that makes up all of the define phase, basically, all set, ready to roll. That's how you would do a project charter. And like I said, the scope diagram part of it would probably done, we do post, it's on whiteboards usually something like that. For the sake of time, let's go forward into plan. Remember, everyone loves plan, everyone wants to do plan. They just want to start putting stuff down. I really want you to think about a task, a date, and a person, a task, a date, and a person. And this was our chunk, our little column there for plan. Plan answered the question, what. What was our question over plan? Do you remember? What would be the... yeah, exactly how. How are

we going to get this done? What order are we going to do stuff with? Who's going to play? How long is it going to take, a date?

Lou Russell:

And I use dates instead of hours? Because hours sometimes get everyone mixed up. So if you say, five hours, is it five hours over two weeks or is it really five hours, five hours? Everybody gets mixed up. But when you say date, date is date. And so, when I do mine, I usually don't put hours. I use... it depends. Some of you may be tracking hours historically, that's a different thing. But predicting hours is a little bit more difficult. I like to predict with date. We would determine what milestones need to be out there? What the tasks? Who goes first? But the dependencies are, do we have enough people to do the work? That's the resource dependencies and this is where we're using up the budget.

Lou Russell:

Okay, so choosing the tasks to do, we look at the requirements first. We do a little bit of a blueprint, we build something and then we implement it. This is the traditional way that you would imagine if you're familiar with it, ADDIE. This is that sort of a methodology. This is one way to build out the schedule. Another way to build out the schedule might be agile. Another way to build out the schedule might be same. I mean, there's lots of different ways we can build out the schedule. This tends to be traditional and learning and development but it certainly is not the only way. But pretend we're looking at ADDIE, which we let's say we sort of are looking at ADDIE at this point.

Lou Russell:

I have a start date up at the top, you can see it 6/1/2013, we missed it totally. And I wanted to end by 7/15, same year. And so, I'm trying to put milestones in between each of these so I know early, when I'm late, instead of waiting until the end, then I'm late. A lot of people don't break these things down, they just go, and they don't really know if they're on time or not on time or whatever. You still need something to time-box the different pieces and how it's going to make itself to the end on time. That's what we do when we're trying to put a project plan together. And a lot of times you can if you do use ADDIE, or something, what we call top down or waterfall, you might just do the tasks that are in the analyser first, one task, one date, one name, and then instead of doing the whole thing, and then going back and doing each section, just do the first bump, the analyser and then do the next one, design, because chances are you're going to be learning things.

Lou Russell:

That's sort of the reason people do that, [inaudible 00:41:00] you're going to be learning from the first steps, so you won't have so much rewrite. If you take it in chunks, you're less likely to have a whole bunch of redo. And be ready for review because if you're not having redo, then you're not doing it right. That's the thing. And then we can... I'm a Post-it freak, I can take little bits of the work and I can see how did these dependencies happen? And when we say dependencies, look at finalized charity and review a sponsor. Clearly, that's what or what order they should go in. If you did review a sponsor and finalize charity you maybe wouldn't, I don't know, that maybe wouldn't work. I don't want to invite the employees until a sponsor is over. But I can still do things in parallel, and eventually I can get the thing done.

Lou Russell:

Once I've done all my posted business, I like to grow up this stuff into some sort of status report. And I usually just use Excel for this, in this kind of template. And you may have bigger projects that this was just a volunteer Day of Caring, so it wasn't especially big. Once I've laid them all out, like I just showed you, then I can just drop the dates in, hope then nothing moves, which it probably will. And then I can put comments in and I can complete the project and keep track of where I am with this. Instead of like I said, going from the beginning all the way to the end without any feedback at all. The project plan template that you'll see when you get it in the fallible project charter bit, the plan is in there also, I recommend that you don't use it.

Lou Russell:

I really think you should just use a tool that you have or use maybe Excel. There's no reason to do it like an award table, it will just mess you all up. Let's assume we got that all done, we've built the project. Now, or at least we built out the plan, now, we build the project. And the word for manage was what? What was our word for manage? That was a tricky one. Anyone remember that? The word? Yes. Excellent. I've got good listeners out there. Okay, so managers do the work. Nobody can get away without doing this phase. Most people jump right into it. A lot of times they don't even do plan, they just jump right into it and do this. This is just do the work. And doing the work is going to be more about influencing people than it is about getting stuff done.

Lou Russell:

All of it is about influencing people really. That's the only way you can get a project done. If you have people that are not getting along your project will not be good. It's your job as a project manager to make sure collaboration and influence is happening all the time. That's as big as whatever else you're doing for sure. Now, once that I am in manage, I can start using that table, that status report. These are little check offs to just show you can see on the right hand side, those little check-boxes are just... these are already done. And the only things I do when I use these and remember, these are for really small projects, I'm doing very small projects with this kind of technique. I only have three things that can happen. It's either done, for example, the second one down review a sponsor, complete, done.

Lou Russell:

Crossed off means we're not doing it. And one of the reasons I leave it on there anyway, is I forget and then I put it back in and then I take it back up, and then I put it back in. This is just intentionally taken out. And then if it's empty if there's nothing there, that means it's not done yet, and red means in trouble. So there's actually four things, red means in trouble. I can't go backwards, but I need to. Those red ones are the ones we got to get on. We got to throw some resources at that. We have done, not done, red, that's basically pretty much and cross through if you have any of those. That's just a real... this again, very basic, very simple, maybe too basic and simple for the type of work that you're doing.

Lou Russell:

Okay, and then finally, how do we end? When we finished manage, remember I said, and this seems sort of weird, but remember I said the customer thinks it's done when manage is over, you're giving them the project, whatever it was that you built. The course, let's say. You're giving it too, it's done right. But we have to sweep up we have to do the review. Review is closing it out, helping make that transition from a box of new thing over to it's going to run forever in my organization, we're going to launch it and somebody has to maintain it, it has to go into the LMS all that kind of stuff. A lot of people think they're

done it, managed, they're not done, the customer got stuff. But to put it in the way that it needs to be maintained forever is the part people completely forget about.

Lou Russell:

And of course, at this part, they really would like to leave the project anyway. [inaudible 00:46:15] sick of it, usually. A couple of things just to circle back, and hopefully we can have a few questions. I have a couple of things that I just share with you. These are the Five Deadly Sins of Project Management. And the first one is, and you've been in the space I know I have, seek first to blame. A lot of times people just get frustrated and they're all trying to blame someone else and all that energy could be used in just getting the project done. You can say amen, if you think that's true, because that happens a lot. And then the other thing we can do is we can get very delusional and we can say, "Well, as long as I'm busy, I must be doing something." I think I felt that way the last couple of weeks. I'm busy, but wait a minute, am I doing something that's important about this day, man, that's the big one.

Lou Russell:

That's great. I think right now we're all, I'm guessing, put a why in there if you agree with me. We are busy, we keep ourselves busy, but are we doing the right thing? And some people are saying, "No, I'm doing the right thing, but it's with all the distractions and stuff." That's pretty tough. The next two are things... we're in L&D, the reason we're in L&D I think that many of you are is because we like to take care of people. We like to be nice. We like to be with people and help them. When someone comes up to us in the hall and says, "Would you help me with this little thing? Someone just told me that you are awesome at this." You say something stupid like this, you say, "We can do that."

Lou Russell:

Without thinking about how long it's going to take? What else is in your agenda because you're a pleaser. Or the sentence number four, which is similar, "Oh, yeah, that will just take a minute." Because we're pleaders, if you're familiar with disk, a lot of us have some influence in our phones. When you answer three and four that way, you're going to end up with what kind of project? Put it in the chat window. What kind of project are we going to have? Three and four is going to give me what? Yeah, a nightmare. Absolute, nightmare. Be careful not to say those two things. Instead, say, "You know what, give me about a day. I'll think through it, and then I'll give you my answer." And that will help you. Remember to do that, that's super important.

Lou Russell:

And then the next thing is to think that every project is exactly the same, the structure may be the same, but there's always some wonderful little excitement in it that you've never seen before, always, always. And so, these are the heavenly truths of project management, we went all church here. Seek first to collaborate not to blame, collaborate, collaborate, collaborate. As we know right now, even remotely, the more people you know, the more things you can get done. So, it's super, super important. I'm busy doing the things that matter to my organization. And that's what we're all trying to do right now, but it's hard. "Yes, we can do that but the impact will be that it will cost you another \$20,000."

Lou Russell:

That's another way to end that sentence. "Yes, we can help you with that. This is the cost of it. What do you think?" And you can do the same thing with number four, which is, "Yes, that will take some planning, I'm probably going to need at least five days to go through this," whatever it is, and you're not

just running away. You're actually telling them legit, what's happening. I'm not talking about making up lies. And then all projects are unique. And the reason all projects are unique is because all people are unique and they all bring some awesome stuff. And they all bring some kind of crazy stuff probably. Sometimes you get frustrated, as we said in the beginning, and sometimes we're joyful. And that's all good. We're just wrapping up, I would like to hear what is your biggest pain right now? Just put it in the chat window, we can watch those go by, besides the whole virus thing, in terms of your work, what is the biggest pain?

Lou Russell:

Waiting for others is a great one. Yeah, and no. Yeah, yeah. Passive content. And certainly, of course, yeah, move online. That's a good one. I'm doing that right now as well. Yeah, that is nice. I like that, too many projects at once, distractions at home, of course, slow, slow, slow status reports portion, I like that. Working with others can be kind of exciting as well, tasks status reports, good, nice. Guidelines, for some acronym, I don't know, excellent. Everything's a priority. I get that in class a lot. I think that I'd like to get the people to give those priorities into class also so I could tell them that, nice. All right. How can project management help you if you can use some pieces in here, how is that going to help you? Put that in the chat window. Okay, how's it the other goes?

Lou Russell:

The other thing I want to tell you about this one for me is that, I'm managing multiple projects right now, as you are. What's nice about it is if we have a little structure like the project charter, after we haven't looked at that project for five days, we can pick it up and go, "Oh, yeah, that's where I was." That's where I was, how to interact with each other. That's also very good. I think I'm a big fan of disc. And I know HRDQ has some really good stuff on this as well. And so, I really like the idea that you adapt to someone else if you can get yourself to be able to adapt so that can work with someone else's fabulous. And then what are you doing for yourself right now? How are you going to stay focused?

Lou Russell:

Nice. Yes. Thank you. Thank you, Soli, how lovely? That makes my heart sing. She said, "Do the project charter." Nice, yes, yes, yes. Good. Where are you going get your space? Yeah. Nice. I am drinking tons of coffee also and walking, walking, walking, walking, walking, walking. Yes, one step at a time. One step at a time. Excellent job. I want to put in a plug for the rocket game. This is something that we do in class, we teach it a couple different ways. But basically, you can see they have to build a rocket. And there's a beautiful blueprint on the right you see that and there's nuts and bolts and these cool popsicle sticks that are plastic. And what happens is you give the team's, "Here's your blueprint. Here's your supplies, I want you to build this exactly like the blueprint."

Lou Russell:

And what do you think happens? The other thing we do of course, is time them to see how long it took them. Okay, so what do you think happens when we just do it that way? Give them the blueprint, give them the stuff, go and we see who goes first. I mean, who wins, in the American way someone has to win. In this rocket game, what happens is, they're very sure of themselves. And it's really interesting, but I'll tell you in case you ever use this and it's a really good exercise for a lot of things, but one of the things that always happens if they refuse to ask the sponsor who is me. They don't ask you any questions at all, they just barrel ahead. And so they miss things, they miss it, the decorator should have been on the top and not on the bottom and just really simple things.

Lou Russell:

They just go flying through it and get about 60% right. And what we do is we make them fix it, keep going, you don't have it right. And that's really hard, because the whole thing's cut already hooked together. I use this a couple different ways. It's a great, great thing to have in class so I highly recommend that. And like all the HRDQ ones, I love all their stuff. With that, I'm at the end. I'm going to turn it over and see if there are any questions.

Sarah Cirone:

Great. We had a question come in when you were speaking on the scope diagram, Lou, he was asking why there can never be a double arrow.

Lou Russell:

Well, that's a really good question. Because if you think about it, it's two totally different things. One is sending something to the project manager and one is sending something to one of the stakeholders. If you mush them together like that, neither of them kind of work right. We don't have a way of tracking things. It's much, much better just use one arrow, one arrow head. Good question.

Sarah Cirone:

David was asking if you could put up the project management charter diagram again.

Lou Russell:

Yeah, maybe, let's go fast, see how I can do it. Here it is. This is the first page and I would normally, not normally but I usually use the flip chart for this but you could pencil sketch or something in the square to do you. That's where your project scope diagram would be, which is my favorite part. And then the second half is about part that nobody wants to do. They always skip this part. It makes me crazy but the communication strategy is as a project manager, who do I have to stay in touch with? Who are the people that I need to check on? You skip that, that's a big mistake. But you think you can improv it but without intentionally making it come out? How often do I see these people?

Lou Russell:

It's what we're doing right now, as we're quarantine or how often should I speak to my people? Should I try to do it every day? Should I try to do it every other day? What should I be doing? Same type of deal. The governance strategy is, who are the decision makers? And again, I want to ask that early. Who is the one that's going to say, "I give you more money or I don't give you more money." A lot of times you say it's a sponsor, but it might not be they might have delegated it to one of the other stakeholders. That's what those two are for, and they are very often skipped. But if you do the whole thing, you just know so much about the project, or at least what to ask again.

Sarah Cirone:

Great. And we probably have time for one or two more questions. We have another question coming in. What's the difference between a project and a process?

Lou Russell:

Okay, great question. A project has a beginning and an end. You build a workshop, it has a beginning and an end. And in the middle are all the tasks you do. Beginning and an end. A process goes on forever. A

process might be trying to think of a better process than obviously, what I just did. A process might be, do your taxes. And you have a little project to do your taxes, but you're going to do taxes every year. That's a process it just goes and goes and goes. A lot of times, well, it's maintenance so if we build the class that we are building, that's the project side, and then you send it off to your LMS And it's going to go and go and go and go. That's the process that you're repeating delivering that workshop over and over again. So, it never ends. Well, of course it does but we say that.

Sarah Cirone:

Great, and I think we'll wrap it up on this last question here it goes back to the rocket game. Emily was asking if the product is purely for project management, or is it adaptable to other topics like teamwork?

Lou Russell:

Oh, yeah, no, it's totally adaptable. And in fact, the one I'm using right now, when I do, we actually...that's interesting. I don't really have time to explain the whole thing but the but what I do is I make up a story, which says that, I'm a person that wants to sell the rocket game, I want to make sure that it's hard enough or not hard enough and so I want you to just test it for me in teams. And so, that just gives you...you can make up little stories like that about, "Well, let's see how long it takes you to build this toy." That's how I use it a lot of times in project management, but that's how I would use it in other classes too.

Lou Russell:

A couple more, I'm a real huge fan of the common currency. If you've not looked at that one, you should look at that one. That's awesome too. And there's, there's some very, very awesome communication artifacts out there in their library at HRDQ, and we are going to meet those as we continue to work remotely. So, if that would be really, those two programs on communication are awesome as well.

Sarah Cirone:

Great, thank you so much, Lou, that brings us to the top of the hour. This was filled with a lot of wonderful information today. And I want to thank all the participants that we had a great interaction today. And thank you, Lou.

Lou Russell:

Thank you. I'm going to thank my dog because she stopped barking just at the right time. So, that was awesome. I do want to say, russellmartin.com is where our website is. I don't know that that Ning bid is working anymore. Maybe not because I've been acquired by another company, but it's just send me a note. I'd love to hear from you.

Sarah Cirone:

Great. And thank you all for participating in today's webinar. Happy training.

Lou Russell:

All right, thank you. Big round of applause for Sarah.

Sarah Cirone:

Thanks, Lou.

Lou Russell:

All right. We'll talk later. Appreciate it. Thanks, everybody.