STEP 1

o **What is Project Management (PM)?**

- Project management is applying skills, traits, resources, people, and tools to a detailed plan to accomplish or meet a onetime objective.

o **What does PM accomplish?**

- Project management takes a team of individuals and leads them in a structured method to accomplish the established goals and objectives within a certain time frame. These projects usually require exceptional detailed planning.

o **Why is PM important to educational projects?**

- Project management is important in education by helping the learners to focus on the educational goals and objectives within the content. Project management can help the learners with their decision making and produce an overall better learning outcome.

o **What were the initial PM tools and what were they used for?**

- Some of the initial project management tools included Gantt charts that was used to guide project schedules and resources. Another set of tools used was two mathematical scheduling methods in the Program Evaluation Review Technique (PERT) and the Critical Path Method (CPM). PERT helps to analyze the tasks to identify the minimum amount of time needed to complete the project. CPM uses a sequential algorithm for scheduling project activities. This CPM method was critical in helping to define a sequence to aide in the length of time the project will take to complete.

o **What do you need to know to use/develop these tools?**

- To use these, you must know the following:

➢ a complete list of activities required for completion of the project
➢ length of time for each defined activity
➢ dependencies between each identified activity

o **What newer tools and techniques were developed in support of PM?**

- **Some newer tools and techniques developed include:**

Lang Factor-established ratio of estimating installation costs for factories, plants, and equipment.

Project Portfolio Management-method to analyze several projects simultaneously to help select a portfolio that minimizes risk and maximizes return. It helps manage and complete projects efficiently and ensure they focused on the right projects.

Guthrie Factors-module estimating technique.

Association for the Advancement of Cost Engineering Total Cost Management- Systematic approach to managing cost throughout the life cycle on any enterprise, program, facility, project, product, or service.

- o **Why are project risks and costs important to PM?**

- The importance of cost and risk to project management is huge because the outcome success and/or failure of the project may depend on it. Proper identification of risk helps you to lean forward with possible uncertain factors of the project in a proactive manner. Proper cost analysis helps to prevent wasted dollars that can affect the bottom line of the organization and ultimately the proper completion of the project.

- o **Why are scope, schedule and cost important to PM?**

- The scope, schedule and cost of project management all intertwine and are important with helping the organization to ensure the members stay on track (scope) with established deadlines (schedules) within budget (cost) for proper completion of the project within the project's life cycle.

- o **How has PM evolved over time (what themes are apparent)?**

- Project management has evolved from a focus of individual efforts to acceptance within the industry. There are now better methods that help visualize and chart data. In addition, it has made progress in optimizing the schedules for completion of projects. It is now more than tools and techniques with new focus on its method of management. The project manager now relies more on the ideas and principles of the project as a foundation to help them initiate, plan, monitor and complete the project.

- o **What are the stages in PM?**

- The five phases of project management include:
  - ➢ *Define*-(State the problem, Identify Project Goals, List the objectives, Determine Preliminary Resources, Identify Risk Assumptions)
  - ➢ *Plan*-(Identify Project Activities, Estimate Time and Cost, Sequence Project Activities, Identify Critical Activities, Write Project Proposal)
  - ➢ *Organize*-(Determine Personnel needs, Recruit Project manager, Recruit Project Team, Organize Project Team, Identify Critical Activities, Assign Work Packages)
  - ➢ *Control*-(Define Management Styles, Establish Control Tools, Prepare Status Reports, Review Project Schedule, Issue Change Orders)
  - ➢ Close-(Obtain Client Acceptance, Install Deliverables, Document the Project, Issue the Final Report, Conduct Post-Implementation Audit)

- **Overall thoughts based on watching both videos…**

- o **What is the 'take home' message from the videos?**

- Project management and instructional design have similarities and differences, but each play a vital role for the instructional designer. A good instructional designer will at times

be a project manager in a way. A successful instructional designer needs to understand project management and the process and skills necessary to aide him/her in their ability to close the organizations human performance gap requirements. Although there are similarities there are also stark differences that must be understood by the instructional designer. The understanding of proper project management and how to incorporate it into your instructional design will ultimately make you more effective in the field.

- o **Why do you think PM is important to education and in particular IDD&E?**

- I think an instructional designer uses project management in a similar way while performing his/her duties. Instructional design is in many ways a "project" for the organization. In instructional design there are many aspects of project management that must be included. Both project management like instructional design look to successfully reach a set of structured goals and objectives through the proper use of resources and tools. The proper application of project management as an instructional designer can aide in helping you better incorporate its method to streamline the instructional goals and objectives you have analyzed, designed, developed, and later evaluated to improve the organizations human performance gap.

- o **How do you think the stages of PM are related to the ADDIE (Analysis, Design, Develop, Implement, Evaluation) phases of designing, developing, and implementing evaluation?**

- The five stages of project management and the ADDIE process can be somewhat similar in nature. In the ADDIE process, the instructional designer focuses on curriculum and learning objectives, while the project manager has more focus in the scope of the project. Both processes are structured and provide a path to clearly defined objectives and goals. Each of the two processes focus on identifying a problem, creating, and formulating a solution to that problem, actioning that plan through structured execution, and finally following up with a method to ensure the organization has met the goals and objectives.

STEP 2

- **First Reading: Accidental Project Managers Not a Myth in the Public Sector**

    - o **What does it mean to be an accidental Project Manager (PM)?**

- An accidental project manager can be defined as a non-subject matter expert that may find themselves in charge of project management with little to no preparation. The accidental project manager may have little to no experience with project management, do not possess any project management certifications or any formal training in the project management field.

- **An accidental project manager**

    - o **Are you an accidental PM - why or why not?**

For this current worksheet project, I would consider myself somewhat of an accidental project manager. Although I have not formed a team for this assignment, I am putting a

project together about the subject of project management with no experience at all. During this assignment (although small in scope) I am having to conduct a lot of research to accomplish the goal of completion. I currently do not have an formal certifications or training within the project management field**.**

- o **What knowledge and skills should a PM have to be highly effective?**

- The project manager should have a complete understanding of people, tasks, tools, and the environment in which they are working. In addition, project managers should have the following skills:

➢ Leadership Skills
➢ Management Skills
➢ Communication Skills
➢ Time Management Skills
➢ Problem-Solving Skills
➢ Organization Skills
➢ Critical Thinking Skills
➢ Risk Management Skills

- o **What is needed to help the growing number of accidental PM to become more effective?**

- Organizations need to understand the importance of project managers and need to do a better job at figuring out ways to improve the project-manager and its functions. The ability to improve available tools for project managers and vet the right individuals that are chosen for the project manager roles will go a long way in helping to increase the growing number of accidental project managers. Organizations can create train the trainer environments in the form of coaching and mentoring from experienced members. Techniques, tools, training, proper manager selection, and methods will greatly help in the growing number of accidental project managers.

- **Second Reading: Project Management Primer**

- o **What do you believe are the 4 most important principles of PM that a NEW PM must follow? ... Why these 4?**

- While they are ALL important, the four most important principles of project management in my opinion include the following:

Know your goal- Without a well-defined and established goal, the project that you are trying to manage has a real chance to never solve the problem for which it was intended. The ability to clearly identify the objectives and goals of the project from its inception will ensure the proper foundation and pillars of the project in which you are charged to manage.

Know your team- I honestly believe that the most precious resource in any management undertaking is the members of the team. Management in any capacity requires good leadership. Good leadership includes knowing your team in and out. The ability to know the team will go a

long way in helping to identify the team's knowledge, skills, strengths, and weaknesses. The project manager can then use this knowledge to provide quality results to the project.

Manage Change-I have often been told that change is inevitable. The ability to adapt and manage change within the phases to the project in my opinion is vital to the project's success. A plan usually only survives first contact and the ability to manage the change within the process is pivotal. There could be unforeseen changes or new ideas in the process that require change to the original plan. This principle will be tested no matter the project and a good project manager must have the skills necessary to manage that change.

Spend time on planning and design- Although change will happen one principal necessary of a project manager is developing a good foundational plan. Therefore, the ability to spend the time necessary to set the foundation is critical. Without a good foundation and the time needed to establish it, it can cause confusion, disorganization and even failure of the project. The bigger the project the more critical it is to carve the time needed in the planning and designing of the project at hand.

- o **Describe how you used or did not use these 4 principles in a simple everyday PM experience you have had recently (could be a project like planning a vacation or a holiday meal, building a toy for you kids, setting up a new electronic device, etc.) and how using or not using these principles affected your project.**

- As a senior leader in the United States Army, I have been involved in many projects over the past 26 years. Some of the reason that I picked the four principles I did was based on mistakes I have done in the past. When deploying large numbers of equipment and personnel to a theater of operation not only is it considered an operation but really it is an enormous complex project. There are many moving parts with vessels, trains, aircraft, and equipment. To deploy you must first spend many months prior planning and designing the operation. It includes various complex moving pieces but the key to success was always taking the time to find ways to accomplish the mission in the least amount of time, most cost-effective way, and with the least risk possible. Without spending the time to build a solid foundation it would have been almost impossible to accomplish. The ability of knowing your team helps with applying the right person for the right job. It was important to know who was trained properly to accomplish the many different duties necessary to move a unit in a timely manner. It includes many different variables including everything from who is qualified to move certain equipment and who was eligible to move into theater. The key was always knowing your formation and the people within it. The plan was just that "a plan" and there was ALWAYS a change in conditions that required me to react and find new methods or techniques. Change will happen as it did to me and thinking outside of the box at a new way to get to the end state was always key. Knowing the goal was always the foundation to deploying a large unit. Where and when we needed to be there to accomplish the mission was important to understand. As a unit working for the commander operating under the commanders intent and understanding the goal was critical to our success. As a senior leader it was

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imperative that I understood the goal and communicated that to every other member of the team.

- o **What is the Scope or Quality triangle and why it is important for a PM to understand it?**

- The scope triangle is a model that depicts the relationships with the "trade-offs" within the established project. It is a model that helps the project manager understand the relationships between things like time, cost, and quality. It helps the project manager in understanding that any of the three can be fixed or variable, but they all effect the bottom line. All three are dependent upon each other and require a unique observation and balance by the project manager to be successful.

- o **Define critical path and give an example of a Critical Path in one of your own project experiences.**

- The critical path represents the "minimum" number of tasks that <u>must</u> be completed for the project to be successful. These critical (or) minimum tasks <u>must</u> be executed to reach the completion of the project for the project manager. I was once put on a project to qualify as many new Soldiers as possible on a rifle system for the Army. In testing this new equipment, the Army was using metrics to determine whether this new rifle would be in the future of Army equipment. I set out to train, teach, coach, mentor and qualify 100 Soldiers on this weapon system in hopes the Army would adapt it as its own. In the process I only managed to qualify 84 Soldiers. Little did I know the minimum was 75 for the Army to consider adoption of the weapon system. In my mind I needed much more than that but all along really met the "minimum" critical number of Soldiers for the Army to consider it to be successful and adopt. In the end, the Army ended up adopting the weapon system because the critical path had been met.

- o **Why is adding more people to a project that is behind schedule problematic, or is it?**

- Adding more people to a project adds more complexity to the project. On one hand you would think that this would speed it up with an "all hands-on deck" approach but it is just not that simple. The more people added means the more time needed to communicate the vision, goals, and scope of the project. In addition, these additional people might not possess the skills necessary and require additional training. All of this can be a distraction and slow the project down quite significantly. Although on the surface it would seem to be faster it will slow down the project and add unnecessary stress for the entire team.

- o **What is scope, vision, and goals and what is the relationship among them in terms of project management (draw a diagram to support your response).**

- ➢ <u>Scope</u>-defined as a broad term that helps describe everything that will be achieved within the project for it to be considered complete. This scope includes the goals, vision, and the requirements within the project.

➤ <u>Vision</u>- defined as a singular idea that helps articulate the direction of the intended project. The vision helps to explain why the project is being constructed to begin with. The key to this is the singular statement for which the vision is articulated.

➤ <u>Goals</u>- defined as multiple subsets that are more specific than the vision itself. These subsets directly support and feed the overall vision of the intended project. Unlike the vision that is broad and overarching to the entire project, goals can focus on to certain objectives within the project. These goals can be identified from many different entities to include the customers for which the project is being designed.
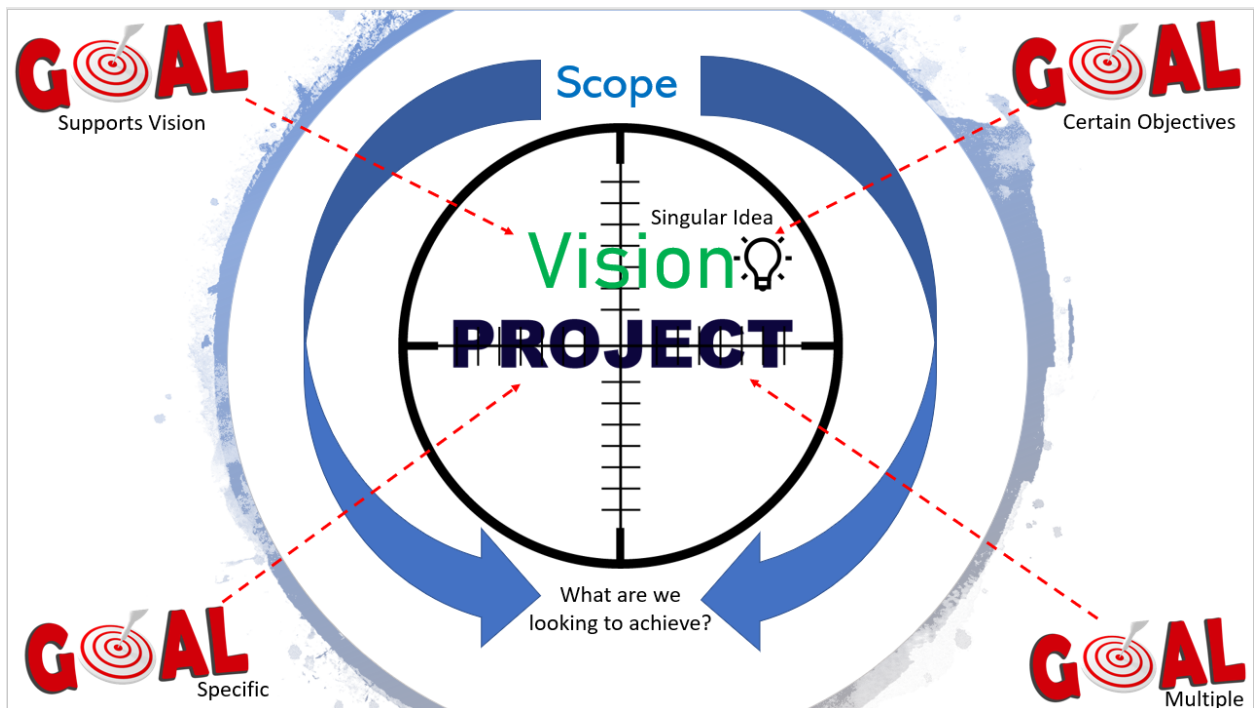
STEP 3

Respond to the following questions after completing the MBTI activity … You will use your responses in the first discussion

- **What was the results of your *MBTI* (after answering questions see the second tab at the bottom of the spreadsheet)...**

<p align="center">I___ _S___ __T__ __J__</p>

- o **What word(s) are used to classify your type (in the title of the Portrait statement, e.g., Visionary, Doer, Artist, etc.)?**
- In my portrait statement I have been defined as the Duty Fulfiller.

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- o **What are the characteristics that this portrait? (e.g., introverted feeling with extroverted sensing)**

  ➢ The portrait of my MBTI survey is the Introverted Sensing Thinking Judging. "The Duty Fulfiller" is Introverted Sensing with Extraverted Thinking.

- The results yielded that the "Duty Fulfiller" may be a serious and quiet person that likes a secure and peaceful living. The "Duty Fulfiller" tends to be extremely thorough, responsible, and dependable. The "Duty Fulfiller" has a knack for concentration and is rooted in traditions and establishments (structure). In addition, the "Duty Fulfiller" is organized, goal oriented, and hard working. The "Duty Fulfiller" usually will accomplish any task that that they put their minds to. The "Duty Fulfiller" can be a natural leader. The traits of the "Duty Fulfiller" although they prefer to work alone, can still work well as part of a team. Orderly and structured environments and high standards are foundational to the "Duty Fulfiller".

  - o **What does your classification tell you about _your_ abilities to work on project management activities as a leader? as a team member? ...**

- Based on the results I would tend to think that I would serve good as a project manager but struggle a bit as a team member. Outward communication will be challenging for me as a team leader as I tend to keep to myself. The lines of communication would be a bit difficult. On the other hand, working as a team member, I can provide value by being dependable, organized, and responsible. A project manager would be able to rely on me ensuring the tasks I was given are completed properly. The characteristic of being a hard worker would add to the team. As a project manager my ability to be thorough, have the needed concentration, organization, and desire to be goal oriented would serve as great characteristics to lead the team. The characteristics that might lend an issue would be that of grounded in traditions. That portion could lead to be problematic by not allowing much open-mindedness to change. Sometimes there are better more innovative ways to complete tasks that are "not the way we always" do it. The "Duty Fulfiller" could struggle with doing things their way and disliking change. The "Duty Fulfiller" has weakness that they always believe they are right, are not tuned into what others may be feeling, or will bring to the project. These types of characteristics could be a potential problem as a project manager.

- **Review the description of the classification that is exactly opposite yours (for example, ENTP would review ISFJ) …**

  - o **How well would you, given your classification, work with people of the opposite preferences?**

- The opposite classification of my MTBI survey is the Extraverted Intuitive Feeling Perceiving (ENFP). The "Inspirer" possesses Extraverted Intuition with Introverted Feeling. Based on my results and the traits for this portrait statement would lead me to believe that in many ways we would work well together. The "Inspirer" is project oriented and seems to be a fit with the goal-oriented portion of the "Duty Fulfiller". The "Inspirer" can relate to people which seems to be a good fit for the "Duty Fulfiller" who

is liked by most people. The "Inspirer" can help the "Duty Fulfiller" by helping to grasp those difficult concepts (critical thinking points) that will allow the "Duty Fulfiller" to help make the logical and rational thinking to the decision-making process. There could be however a couple of points of contention between these two classifications. Although both are natural leaders the "Inspirer" does not like to control people and seems much more sympathetic to personal feelings. The "Duty Fulfiller" might have those strong opinions and not be as naturally in tuned with people's feelings. This might cause some lack of focus within the project scope. Overall, I think the creativeness of the "Inspirer" with the hard work and determination of the "Duty Fulfiller" make them a good fit for many different project types and scopes.

- o **Comment on whether you think it is important to know your and other team members' MBTI preferences and why.**

- It is critical for members of any team to understand the traits of each other for it to succeed. Problem solving, critical thinking, and management as a group can be challenging. It is important that the team can showcase each member's unique talents for the projects that they are part of. Just as important you must know what traits each member of the team have so that you can identify their strengths and leverage those strengths towards project completion. A successful project manager will inspire others by understanding his/her team traits and how to plug and play each member together as a cohesive team. Each person within the team brings a unique set of talents, skills, ideas, and expertise to the table. The better each member of the team understands one another, the more apt they are to balance the strengths and weaknesses to ensure project success. The MBTI is an excellent tool to be able to dive into a deeper understanding of each member's traits and preferences within the project. After using this tool, I would have a hard time understanding why any organization would not use this. People of any organization can be argued are the foundation to success. The strength of the company is directly tied into how the people within the organization work and function together. The MBTI survey is an excellent tool that allows an organization to assess the people and help everyone within the team understand how each person can bring success to the overall goals and objectives.

Respond to the following questions after reading the articles… You will use your responses in the first discussion…
- **Reading 1: Social and Behavioral influences on Team Processes**

  - o **What is the relationship among social behavioral stages of individuals and team management style?**

- Effective leadership and more importantly management can only be successful if you understand the members of your team. There are numerous social behavior changes that are extremely diverse and include many different factors. All members of the team come to the table with a set of diverse social behaviors that can be either positive or negative to the progress of the project. Thus, these social behavioral stages can lead to the project staying on a path towards successful completion or can quickly lead to failure for the entire team. The team management style that is incorporated is directly tied to how these

social behavioral stages can lead to success or failure. The team management style must look at how these social behavioral stages for each person blend to form a cohesive and productive team. The project manager must ensure his/her team members feel valued, are open-minded, and represent a diverse way of thinking from the social make up they come from.

- o **How does this related to definition of effective teams (hint: see table 2 in Social and Behavioral Influences on team process)**

- A group will go through a process of phases known as _storming, norming, and performing_ no matter the diversity or make up.

- In the _storming phase_ team cohesion will be low as members of the team look at moving from the initial focus on self to the team. This will require a hands-on approach from the project manager that needs to clearly articulate the expected behaviors, rules, and expectations. The project manager must also be able to start to assess the strengths and weaknesses of the team members. Leadership in this stage is important for the project manager by confronting negative behaviors and the ability to ensuring the members are "buying" into the process and not looking to separate from the group.

- In the _norming phase_ there is a clear transition from the team members to the team process in its entirety. The cohesion of the team is moderate and requires a less direct management style and more of a supportive management role. There will still be times for direct management at critical points such as the project manager identifying members moving away from the objectives and goals. A good project manager will look and encouraging relationships, collaboration, positive emotions, and will ultimately redirect any negative emotions within the process. The project manager should exemplify a positive outlook during this phase.

- The _performing stage_ is a culmination where the team is unified and perform as a singular unit. The team can manage itself and requires little from the project manager. The project manager should encourage creative and critical thinking and naturally allow the project to meet the intended goals and objectives. The ability for the project manager to maintain the awareness of the objectives and goals and keep that in focus is the key to success.

The Social/Behavioral stages will happen with any group as part of its natural progression. The ability to achieve an effective team will depend on the ability for the project manager to understand the stages and guide its members through the process. The goal of any effective team relies on their ability to complete the desired project for the intended result. The correlation between the social behavioral stages and an effective team can only be accomplished through a complete understanding of how they apply to each of the team members and the individual responsible for its management.

- **Reading 2: Applying Emotional Intelligence in Project Working**
    - **What is emotional intelligence and why is it important to project management, or not?**
    - **What are the concepts of self-awareness, self-management, social awareness, and relationship management and how are they related to each other and project management?**
- Emotional Intelligence in simple form is someone's ability to visualize, command, and assess emotions. There are four major categories of emotional intelligence that include <u>Self-Awareness</u>, <u>Self-management</u>, <u>Social Awareness</u>, and <u>Relationship management</u>.
    - ✓ <u>Self-Awareness</u> helps the individual to understand how you are coming across to others and helps you to have visibility into your own strengths and weaknesses. Self-Awareness is at the foundation of emotional intelligence and helps us to understand what drives us, our emotions. Self-Awareness also helps us to support our emotional intelligence over a period and how shows us how our decisions directly impact others.
    - ✓ <u>Self-management</u> can be described as the ability to have discipline to manage your emotions with a focus on restraining the ones that could cause potential trouble. It is imperative that we outwardly exhibit a positive outlook to drive momentum for the project. This can be even more difficult in stressful situations. Transparency also plays a vital part in this category. The ability to apply integrity and values for all to see is critical to serve as a role model for others within the team. You must always look to be the model for others to follow. Within this category the ability to show optimism and adaptability are paramount. Optimism is contagious in a group and looks to keep the group focused in a positive way. Being adaptable, remaining flexible, and having the ability to adapt to change helps to achieve specific results in uncertain circumstances. Finally, motivation relies on the internal drive to exceed the standards and achieve excellence.
    - ✓ <u>Social awareness</u> helps us to understand how each member of the team might feel based on the structure in which they come from and thus, can assist us with managing the bonds we have with team members. Within social awareness you will find empathy that helps us to perceive team members feelings and perspectives. In addition, in this category it is important for us to understand the organizational awareness and dynamics of team members within the project. Lastly within social awareness we must be able to foresee needs and long-term relationship commitments through service orientation.
    - ✓ <u>Relationship management</u> or "social skills" can be argued are the most visible to others. The ability to be a coach and mentor can go a long way at strengthen the relationships and helping to develop others in the organization. In this category you should look at managing conflict with changing and instilling teamwork in the organization. The ability to influence others within the organization is critical to moving the team in the intended direction.

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Emotional intelligence is critical to project management because often it will encompass an extremely diverse team in corporate America. This can include many different people from a diverse set of industries that all collide in the project scope and execution. Every project is bound to be different and are only for a short period of time. It is important that those relationships need to be established quickly and require an effective project manager to assist in that process. Relationships and the cultures within the project management field are extremely diverse and carry a significant risk. This is the reason why an understanding of emotional intelligence and how to apply it in project management is so vital to its success or failure.

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