**Project Management**

**TIME ALLOTTED: 75 minutes**

**PRESENTER(S): Stefan Schaffer, Grassroots Special Projects Director**

**MATERIALS NEEDED:**

* Projector and PPT
* Butcher paper and markers
* Pens/pencils + scrap paper for audience members
* Timer

**GOALS FOR THIS SECTION:**

* Understand the definition and challenges of project management
* Understand the habits of strong project managers
* Acquire two new tools for managing projects
* Get excited to apply these habits and tools to future habits!

**AGENDA**

**0:00 – 0: 05 Introduction, Overview, Goals and Agenda**

0:00-0:03 Personal story introduction

* **[Slide 1]**
	+ [Trainer should give a two-minute version of their personal story as relevant to this module. If possible, try to weave project management into your story. Don’t forget to share challenge - choice - outcome and practice it like any other section!]

0:03 – 0:04 Goals

* **[Slide 2]**
* As a member of the OFA, family you have no doubt managed a complex project and worked with others to achieve a successful outcome. This module will aim to build upon this experience – at the end of this session our goal is that you [read from slide]:
* Understand the definition and challenges of project management
* Underestand the habits of strong project managers
* Acquire two new tools for managing projects
* Get excited to apply these habits and tools to future projects!

0:04 – 0:05 Agenda

* **[Slide 3]**
* So let’s go over what we’re going to do in this session.
* We’ve just reviewed the goals of this module – next we’ll move into defining the challenges of project management and brainstorm some best practices.
* Then we’ll review seven good habits of effective project managers
* This leads into two of my favorite tools – MOCHA, for those of you familiar with “The Management Center” training, and a Taskmaster, both of which will help you keep your projects on track.
* And then we’ll debrief and wrap up.

**0:05 – 0:30 Challenges of Project Management**

0:05 – 0:07 What is Project Management?

* **[Slide 4]**
* Let’s start this module off by getting your ideas on this question: *what IS project management*? [Presenter takes 1-2 responses from audience]
* Wikipedia defines project management as “the discipline of planning, organizing, motivating and controlling resources to achieve specific goals associated with a temporary endeavor with a defined beginning and end.
* In OFA terms, we like to think of it as “getting important work done while empowering others.”
* Put simply, project management is organizing. So what role does a project manager play in all of this?

0:07 – 0:09 What is a project manager?

* **[Slide 5]**
* What do you think a project manager is? What is he or she responsible for? [Presenter takes responses from audience, seeking to elicit the responses below]
* Great! That’s right, a project manager:
1. Is responsible for the success or failure of the project
2. Does not do it all him or herself
3. Leads a team of people who are often peers not directly managed by the project manager

0:09 – 0:12 What are the challenges of project management?

* **[Slide 6]**
	+ Let’s take a minute to write down a few thoughts on this topic [Presenter allows audience to silently reflect on this topic and write down their thoughts on paper].
	+ Heads up! What are some of the challenges you thought of? [Presenter takes suggestions from audience and writes them on butcher paper, emphasizing the most salient points].
	+ [Presenter should also highlight any responses that invoke “lateral” or “horizontal” relationships – this will lead-in nicely into the next slide on later management].

0:12 – 0:14 What is lateral management?

* **[Slide 7]**
	+ As you mentioned, one common challenge is working with members of a team – often members of a team that you don’t directly manage – to accomplish a common goal on your particular project.
	+ This is at the core of lateral management – as a project manager, you’ll need to identify the job which you can only do well with help from those people you don’t manage to accomplish those tasks that others can and should accomplish.

0:14 – 0:19 Silent Reflection

* **[Slide 8]**
	+ Now we’re going to take a moment to reflect on some questions that pertain to project management – specifically projects you have managed in the past, or possibly projects you are currently managing.
	+ Let’s take 4 minutes to reflect on the following questions:
1. What are the 3 most important projects that you are responsible for overseeing in your job?
2. Which one relies most on you working well with your colleagues?
3. Which colleague(s)?
4. What are the greatest challenges you face with this working relationship?

0:19 – 0:24 Breakout Discussions

* **[Slide 9]**
	+ With your responses fresh in mind, please break out into groups of two or three and:
1. Discuss the challenge you wrote down, and explore potential solutions and best practices.
2. Come up with one solid tip (per group) for developing effective work relationships around your project. Try to make it unique – you will report out to the group.
	* [Presenter should allow 4 minutes for breakout and brainstorm]

0:24 – 0:30 Report-back

* **[Slide 10]**
	+ Now, let’s hear back from each group with one solid tip for developing effective work relationships around your particular projects. If another team takes yours, come up with another one!
	+ [Presenter writes down feedback from audience on a new piece of butcher paper, emphasizing the most salient points that come up].

**0:30 – 0:50 Seven Habits of Effective Project Managers**

0:30 – 0:31 Agenda

* **[Slide 11]**
* Now that we’ve defined project management, thought of many of the challenges associated with it, and even brainstormed some best practices for developing good work relationships around your particular projects, let’s expand on these thoughts by outlining seven additional habits of effective project managers.

0:31 – 0:34 Seven habits of effective project managers – 1. Be Organized.

* **[Slide 12]**
* The first good habit of an effective project manager is to *be organized*.
* As the manager of a project, you have to stay on top of every single detail and deadline – your team and project depend on it!
* By being organized and ahead of the game, you are setting your team up for success – as a result of your good organization, they too can organize their thoughts and approach the project effectively. A well-organized project manager is highly motivational.
* Also, here’s another pro tip: Plan your project backwards from the end date. This will help you outline (in excruciating detail) the various steps that need to be taken – and the timeline that goes with it – for your team to be successful on a given project.

0:34 – 0:36 Seven habits of effective project managers – 2. Define Success and Set Clear Expecations.

* **[Slide 13]**
* In addition to staying organized, it’s important to define success for the project and set clear expectations with your team.
* Without clear definitions of what success means and what failure means, you may be shortchanging your team – they may never fully understand what it is that you hope to accomplish unless you articulately clearly and explicitly.
* Sentences like “Here’s what success looks like on this project… or here’s what failure looks like on this project…” are a good way of making sure you are setting clear expectations with your team.

0:36 – 0:39 Seven habits of effective project managers – 3. Build a strong team and earn their buy-in.

* **[Slide 14]**
* Does anyone recognize the team here and what they accomplished recently? [Presenter waits for the correct answer: Baltimore Ravens, the 2013 NFL Champs]
* What’s unique about this team? For the purposes of this metaphor. [Answer: They are all specialized in different areas, and while no one player is considered the superstar of the league, they must rely heavily on one another to be as successful as they are. This is the same for any team you manage – as a project manager, you must identify the strengths and specialties of members of your team so you can have maximum impact.
* What is meant by “earning their buy-in?” [Presenter waits for responses from audience, repeating back the most salient points]. How might one earn buy-in?
* That’s right! It’s important to make sure your teammates are bought in so that you have the same end goal in mind. They should *want* to take on their responsibilities – and it is your role as project manager to figure out how exactly to motivate them to do so.

0:39 – 0:42 Seven habits of effective project managers – 4. Use repeat-backs and operationalize language.

* **[Slide 15]**
* One common motto we at HQ is “overcommunicate.” I cannot emphasize this enough – by overcommunicating, you are taking extra precaution to make sure everyone is on the same page before you commit to any particular course of action.
* For example, if there’s any uncertainty in the timeline, goals of the project, the division of the labor, etc., this is
* So you can implement this in various ways – two best practices include 1) using repeat-backs and 2) operationalizing language.
* [Presenter asks audience: What is a repeat-back? And takes answers. Presenter can even model an example of a repeat back and choose one particular audience member to do a repeat-back on a particular assignment].
* That’s right! This is a common technique to make sure there is no miscommunication and that everything has been communicated clearly.
* When we say “operationalize language’ – what does this mean? [Presenter takes answers].
* That’s right! A good project manager agrees on a standard terminology and language to use for their projects – for example, rather than calling a project “the video project” we might call it the “OFA Obamacare Advertisement” to be specific and avoid any confusion.

0:42 – 0:44 Seven habits of effective project managers – 5. Be mindful of tone in emails.

* **[Slide 16]**
* It’s important to overcommunicate, but as a project manager, you must also always be mindful of how you communicate.
* This is especially trick in e-mails – so be cognizant of the tone you take when you are checking in with your team or assigning out responsibilities.
* The last thing you want to have happen is that your communication serves as a de-motivating force – always keep things positive and professional.

0:44 – 0:47 Seven habits of effective project managers – 6. Make it easy for your team members to deliver.

* **[Slide 17]**
* It’s also highly important to make it easy for your team members to deliver. What do I mean by this? [Presenter waits for audience to chime in].
* Great! Sending them reminders, providing them resources as needed, keeping a running task list available to them, doing regular check-ins and asking: these are all techniques to makes your team more likely to perfrom
* One example: rather than sending a reminder that simply says “Hey so-and-so, just a reminder that I’ll need your edits on the document by 7pm” you could instead say “Hey so-and-so, just a reminder that I’ll need your edits on the document by 7pm, and it’s attached here for your review.”
* Little touches like that can go a long way in making sure your team members can deliver – and that they are motivated to perform.

0:47 – 0:50 Seven habits of effective project managers – 7. Track progress and adjust as needed.

* **[Slide 18]**
* It’s important to keep track of progress as a project manager. Figuring out what exactly your measures of success are is *key* – without clear indicators of success/progress are, you won’t have the ability to figure out if your project is succeeding or failing.
* What are some examples here of how someone might track progress? [Presenter waits for answers].
* That’s right! Metrics, benchmarks, certain deliverables on a specific timeline, these are all great.
* It’s also important that a project manager be able to adapt accordingly. Contigency plans are a must – if a project is not going well. Good foresight and routine tracking of progress should allow a project manager to make important decisions in the face of adversity on a particular project.

**0:50 – 0:65 My Favorite Tools: MOCHA and Taskmaster**

0:50 – 0:51 Agenda

* **[Slide 19]**
* Now let’s get a little bit practical and look at two of my favorite tools – one, which we call “MOCHA” – allows us to define specific responsibilities for any given project.
* The other – a Taskmaster – is simply a spreadsheet that allows you to track specific tasks, who is responsible for them, and when they are due.

0:51 – 0:60 The MOCHA approach to definiting responsibiltiies

* **[Slide 20]**
* You may have seen this before as part of a “Management Center” training – but it’s always worth revisiting MOCHA. MOCHA, which is an acronym, is a strategy on how to approach assigning out responsibilities for any given project.
* It’s great to know that this can be done on as macro a scale as you like (for example, running the Fellows program in your state), or even applied to individual tasks that are more specific (for example, the data trainings for Fellows)
* Let’s read off what each letter in the MOCHA acronym stands for:
	+ Manager – Assigns responsibility and holds owner accountable
	+ Owner – Has overall responsibility for the success or failure of the task or project
	+ Consulted – Should be asked for input or needs to be bought into the projects
	+ Helper – Available to help do part of the work
	+ Approver – Signs off on decisions before they’re final
	+ OK now let’s think back to the project you were brainstorming around earlier and actually spend 3-4 minutes mapping out the MOCHA for your particular project [Presenter waits for folks to silently fill this in]/
* Who wants to share? [Presenter asks individual to come up to the front and share their particular project, transcribing the Manager, Owner, Consulted, Helper and Approver onto the board].
* Alternatively, presenter can also come up with a scenario for which he/she will map out MOCHA.

0:60 – 0:63 A taskmaster helps you keep track of what is due when from whom

* **[Slide 21]**
* Now let’s look at another tool, the Taskmaster. This is simply a spreadsheet that helps you keep track of what is due, when, and from whom.
* You’ll notice it’s a very simple layout – you can list tasks, their deadline, who the owner is, any helpers, and importantly, a status column to keep track.
* It’s a good idea to keep data uniform (i.e. by keep the spelling of names consistent – as opposed to something like Ashley vs. AP vs. Pinedo – this is powerful because you can then use basic Excel functions to sort and filter accordingly.
* For example, I could filter my taskmaster down to any tasks where Ashley is listed as the owner, or any tasks that are not yet initiated, and so on and so forth.

0:63 – 0:65 A taskmaster only works if you work it

* **[Slide 22]**
* Ask the audience: What are some ways you might use a tool like this to manage a project?
* Key takeaway: it takes some maintenance, but can save time in the long run if you have a lot of different moving parts on a particular project.

**0:65—0:75 Debrief and Closing**

0:65 – 0:66 Agenda review

* **[Slide 23]**
* So this is what we’ve covered so far: [read off slide along with some key items from each section of what we’ve covered].
* Now we’re going to debrief everything we’ve learned today!

0:66 – 0:75 Debrief

* **[Slide 24]**
* [Presenter will have audience spend 4-5 minutes writing down thoughts re: the questions below, then take 1-2 answers for each of the questions]
* What is the most valuable thing you learned today?
* How will this help you better achieve the deliverables of your job?
* What situation, project or relationship will you apply this to next?
* What remaining questions will you have?

0:75 Thank You!

* **[Slide 25]**