

PROJECT MANAGEMENT USING MICROSOFT PROJECT

CHECK LIST

Introduction

We realize that some of you have real jobs as well as responsibility for project management and that there are diminishing returns when you apply these processes.

However, John Vu et al have demonstrated the overwhelming correlation between success and application of these processes in IT and other industries.

It is rather frightening to note how many companies in India are at Level 4 and 5 on the software capability maturity model. See <http://www.sei.cmu.edu/cmm/cmms/cmms.html>.

The Project Management Institute (PMI) ® provides great resources. See <http://www.pmi.org>. Their Guide to the Project Management Body of Knowledge (PMBOK) ® is particularly useful and has become a global standard. The Glossary contains common project management acronyms and definitions. The PMBOK ® Guide can save you a lot of unnecessary iteration. Don't reinvent the wheel.

PMI's Project Management Professional (PMP) ® certification is also highly recommended.

The new tools such as Microsoft Project ® have improved dramatically in recent years. Project management without them is like trying to play tennis without a racquet but you have to learn the ground strokes too.

Microsoft Project is much more powerful than most people realize. It takes several days with an instructor, experienced in both project management and Microsoft Project, to learn it well. It takes a lot of mentoring and practice to master it. In fairness, it's a lot easier to learn than some of its predecessors.

It is particularly important to understand how the software options work, by themselves and in combination, e.g. Fixed Duration, Fixed Units, Fixed Work, Effort Driven, Split In-Progress Tasks, etc. You should also become familiar with Resource Loading, Updating, Earned Value, etc. and how the software calculates, depending on the settings.

You can learn a lot by practicing with five activity schedules, loaded with simple resources and costs to check out the algorithms. It also helps to have a mentor or someone who can analyze your schedules for you.

Microsoft Project should be customized specifically for your industry and company by changing defaults, setting up standard WBS and reports, etc. to maximize its benefits.



If you apply these new tools and techniques well, you will dramatically increase project success, productivity, profits, protection, poise and pleasure while decreasing risk and burn out.

Following is the Summary outline from one of our detailed course handouts.

Please call or email us at admin@TWGpm.com if you have any questions or if you would like detailed information.

Company Standards

It is relatively easy to customize Microsoft Project for your industry and company by changing the software defaults and by setting up company standards. Customization pays huge dividends. It saves a great deal of time for the project manager, senior management always sees the same reports regardless of project, and you can roll up all the company projects into one file to demonstrate the effect on company resources.

Once you demonstrate impact on resources you can often get less important projects postponed or cancelled and free up valuable resources for high priority projects. You can also negotiate for more time, more resources, better or full-time resources or less scope on important but unrealistic projects.

It is really important that you set up standards and have everyone proficient at single projects before you attempt to work at the enterprise level using Microsoft Project Server. Otherwise, you will "get garbage in, garbage out".

- 1. Set Microsoft Project defaults as recommended by TWG.**
- 2. Set up company schedule templates using defaults.**
- 3. Save paper and "real estate" on screen.**
- 4. Agree on Company WBS for project, focusing on deliverables.**
- 5. Set up company standard Reports, Views, Tables, Filters, etc.**
- 6. Insert and Understand Microsoft Project Toolbars**

Planning

Thorough planning is a lot of work as you can see below. If you can reuse the template or if you are doing a risky project for the first time, it can pay huge dividends. Use your judgment and experience as to how much planning is required. If you do it well, updating should be relatively easy. Follow the Project Management Body of Knowledge (PMBOK) Guide ® from the Project Management Institute (PMI) ® to save yourself a lot of unnecessary iterations.

1. **Plan project at WBS Level 1 using whole senior team and "Post- It" note exercise.**
2. **Choose correct number of activities at Level 1 for your project.**
3. **Draw in logic by hand using conventional (Finish to Start) relationships.**
4. **Discuss activity durations, build consensus and negotiate.**
5. **Make one person responsible for each activity.**
6. **Enter Level 1 (Summary) schedule into software using conventional relationships.**
7. **Do not put in ANY dates except the start date of the project!**
8. **Write assumptions in Notes Field of Microsoft Project.**
9. **Prepare Level 1 (Summary) Schedule.**
10. **Prepare Level 2 Schedule**
11. **Repeat at Level 3, using Rolling Wave approach if necessary.**
12. **Repeat at Level 4, using Rolling Wave approach if necessary.**
13. **Load Resources.**
14. **Negotiate.**
15. **Use the Total Float sort to find missing logic.**
16. **Fast track IF necessary or desirable.**
17. **Resource level schedule manually and share float to get optimum results and accurate PV (BCWS).**
18. **Try different scenarios.**
19. **Analyze Risk.**
20. **Plan Quality in.**
21. **Integrate.**
22. **Optimize the above.**
23. **Get approval and buy in.**
24. **Save Baseline.**

Schedule Control



- 1. Generate standard company reports.**
- 2. Update schedule and insert Impact Activities.**
- 3. Use the appropriate Microsoft Project algorithm to reschedule uncompleted work.**
- 4. Re-baseline and Targets**
- 5. Use Earned Value.**
- 6. Actively manage all nine areas addressed by the PMBoK.**
- 7. Fix problems immediately they occur.**
- 8. Update schedule template at end of project with lessons learned so it can be used on future projects.**

Conclusion

Microsoft Project is much more powerful than most people realize. It can help you manage scope, time, cost, quality, human resource, communications, risk, procurement and integration and you're cheating yourself if you just use it to manage time.

You can get the most out of it by taking a good class, changing the defaults, customizing it for your company, practicing, and setting up a mentoring system. Please call or email us at admin@TWGpm.com with comments or if you'd like more detailed information or some help. Recommended Microsoft Project Defaults and a Detailed Checklist are available in our classes or for \$50 by email.

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