Managing the *Perfect* Project

Connecting Up
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Intro

- ▶ Professional experience
- ▶ FundraisingForce
- ▶ Fundraising strategy
- ▶ Technology
- ▶ Tech searches
- ▶ Tech implementations

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Agenda

- Project Management – defined
- Project Management – goal of
- Skills of a Project Manager
- Project Management Stages
- Project Management resources
- Where to find a Project Manager
- Key takeaways/lessons

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Poll

Poll

- How many of you are seasoned vs first-time project managers?

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Goals

Goals for Today

- Offer you steps to manage project
- Offer you resources
- Offer you lessons learned

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Definition

Definition

- Project Management
  - Process that guides a team's work to accomplish all project goals

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Goal

- Project Management goal
  - Producing a completed project that meets objectives

Skills

Skills

- Project Manager:
  - Effective communicator
  - Negotiation/diplomatic
  - Scheduling and time management
  - Leadership
  - Level of technical expertise
  - Risk management
  - Critical thinking and solutions-oriented
  - Organisational
  - Financial
  - Orchestra leader
  - Cheerleader
  - Traffic cop

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Stages of Project Management

Stages of Project Management

▶ Conception & Initiation

▶ Definition & Planning

▶ Launch or Execution

▶ Performance & Control

▶ Project Closure

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Conception & Initiation

▶ Evaluation

▶ Defining

▶ Key outputs:

➢ Project Charter

➢ Project infrastructure

➢ Project plan

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Definition & Planning

▶ Project scope of work (SOW)

▶ Project timeline

▶ Project resourcing

▶ Project tool box

▶ Communications/Change Plan

▶ Risks Register

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Launch or Execution

▶ Project kick-off

▶ Quality assurance

▶ Forecasting

▶ Project Team delivery

▶ Key outputs:

➢ KPIs

➢ Project Status Reports

Performance and Control

▶ Objectives

▶ Deliverables

▶ Effort and costs tracking

▶ Performance

▶ Steering Committee oversight

▶ Key outputs:

  ➤ Project Team meetings

  ➤ Steering Committee meetings

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Project Closure

▶ Post mortem

▶ Project debrief

▶ Formal handover

▶ Project punch list

▶ Reporting

▶ Celebration

▶ Business as usual

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Project Management Resources

- Budget tools
  - **Microsoft Excel**
- Scheduling
  - **Smartsheet**
  - Microsoft Project
  - Monday.com
- Risks Register
  - **Microsoft Excel**

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Resources

Project Management Resources

▶ Collaboration and Tasks Management

  ➢ **Trello**

  ➢ Asana

  ➢ Microsoft Teams

  ➢ **Sharefile**

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Where to find a Project Manager?

Where to find a PM

- ▶ Word of mouth
- ▶ Google
- ▶ Your technology partner

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Takeaways

Takeaways

- ▶ Not everyone can project manage

- ▶ Project management requires the right skills set

- ▶ Project management is not a casual, 2-hour a week gig

- ▶ Time spent in the Definition & Planning stage will save time downstream

- ▶ There are professionals in the market available to project manage your projects

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Questions?

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