Project Management Taster course – teacher guidance

Aim of course: A ¾ day course for non-PM trained staff (either in PM or non-PM roles). Introduce concepts, raise awareness & understanding. Delegates should leave with <u>confidence</u> to work <u>with & alongside</u> projects and use <u>simple techniques in their current work</u> (whatever their role).

Caution: This is **not** about teaching any formal approach (ie PRINCE2) or training people to be project managers.

Structure of course: Teacher introduces PM concepts in plain English then allows delegates to explore them through **group discussion** and **project team** sessions as the course guides them through the planning of a simple project onto a poster sized worksheet. Aim for 1:10 ratio of teacher '**lecture**' in front of class to group discussion & project team sessions.

Duration: ¾ day: 10:00 – 16:00 with regular breaks (which can be combined with syndicate sessions). Go at the pace of the delegates.

Materials:

- Powerpoint slide pack (on screen) to introduce concepts;
- Printed version of slide pack for delegates to take home (including glossary of terms)
- 'Think-Plan-Worry-Do-Learn' aide-memoir (laminated);
- A4 'Think-Plan-Worry-Do-Learn' worksheet for note making;
- A0 'Think-Plan-Worry-Do-Learn' worksheet (per syndicate team) for syndicate exercises;
- Pens, flipcharts etc

Pre-preparation: You will need to be familiar with the structure of the course and the worksheet the delegates will be completing. You must have prepared examples from your own career to add 'war stories' into the day.

Time	Section	Aim	Details	Guidance	Teacher notes
0930-0945	Check room	Confirm materials	Your host hopefully will have set up the room into 'wedding reception' style and provided all materials.		
0945-1000	Welcome & coffee				
15 mins	Introductions	- Delegates start talking to each other - Teacher understands baseline knowledge & aspiration of delegates - Delegates gain confidence they are 'not alone' in any lack of understanding	**Group discussion:** - Get into pairs (not the person you are sat next to) - Chat and prepare to introduce the other person: - Name - Any experience of project working - Hop & Fear for the day	Give **5 minutes** to chat **2 minutes** per person feeding back. Ask clarifying questions. **Flipchart:** record each name & their ambition for the day and say we will check this at the end	Capturing people's fears for the day and then agreeing as a class how to hold everyone to account to prevent the fears from materialising makes a successful day.

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2 mins	Course aim	Delegates agree with course aim	**Lecture:**
			• Course aimed at those with little or no PM experience
			• Aim to give a taster so you feel confident:
			  - Working within / alongside projects
			  - Applying simple PM tools to your current job
			• We will try and meet your individual aims (captured earlier on flipchart)
				• We will use **basic English** but will introduce the language you may come across.
				• Please jump in with **questions** whenever you have them.
				• Informal & relaxed.
				• Tips you will learn will be equally relevant to pure project management and normal business	

3 mins	Teacher introduction	Delegates trust you know what you are talking about	**Lecture:** • Give 2 minute career history • Talk about your first experience of PM (how you felt on your first course) • Your greatest achievement • Your best lesson learned	Make it sound **fun**!	
5 mins	Perceptions of Project Management	Get all the negative perceptions on the table right away	**Group discussion:** • Ask 'What did you want to be when you grew up?' • Ask 'Who wanted to be a Project Manager?' • Ask 'Why do you think Project Management sounds so dull?' and capture on **flipchart**	Steer towards paperwork, spreadsheets, meetings…… What were your early perceptions & did they put you off. How did you get past them?	
5 mins	What can Project Management achieve?	Realise Project Management is going on all around us & it does great things	**Group discussion:** • Projects delegates have heard about in the news & capture on **flipchart**	Eg Channel tunnel, Olympics, HS2, Millenium Dome, Stonehenge, stop smoking…. ***Your flipchart needs room for GOAL and WHY add-ons later***	
10 mins	What is a project	Able to identify a project from routine work	**Group discussion:** • What do these projects have in common & capture on **flipchart** **Lecture:** • **<Slide>** formal definition of project • **<Slide>** project lifecycle	Eg defined end point, new & not done before, risky, costly, tangible output, long term benefit Lifecycle – use THINK-PLAN-DO/WORRY-LEARN	

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5 mins	Introduce NAME, GOAL, WHY	Understand the importance of constantly asking **WHY** – before you start planning	**Lecture:** • **<Slides>** NAME; GOAL; STRATEGIC OBJECTIVE **Group discussion:** • What was GOAL of some of the projects; what was strategic outcome (WHY) & add to 'big projects' **flipchart**	Olympics – put on a fantastic sporting event / long term rejuvenation of part of London & economic prosperity Smoking – reduce no. smokers / save money in NHS	
5 mins	Your projects	• Realise everyone has been a Project Manager at some point already • Identify things in delegates' everyday life that could be treated as projects	**Group discussion:** • What have you achieved that had a clear finish point, goal, time, cost & add to new **flipchart** • What things in your life you consider to be projects (at home or work) & want help with! & add to same **flipchart**	Ask what people's GOALs were and WHY they did it. Eg house extension, new kitchen, wedding, applying for promotion, Christmas shopping…	
20 mins	NAME GOAL WHY	Agree a group project & understand importance of GOAL and WHY	**Lecture:** • I want you to get into 'project teams' of 3-4 & choose one of these everyday projects to work on all day. • Hand out A0 **worksheets** • You will work on these worksheets all day and fill them in bit by bit. • Each project team will do a 5 minute pitch at end of the day. **Project teams:** • Fill in & come back to present NAME, GOAL, WHY	Let teams self form. Experience shows using a non-work related project is much more effective than a work related project. **15 minutes** in groups **2 mins** each to present back	
1115-1130	**BREAK** …….				
5 mins	WHO CARES	Understand people are at the heart of all projects	**Lecture:** • **<Slide>** STAKEHOLDERS **Project teams:** • List the people who care about success or failure or will have a view on how it will be done. • Circle the one person who cares most (to be the Project Executive)	"It doesn't matter what your project is – people are at the heart of it. Whether they are the end users, beneficiaries, financiers or those involved in delivering it. Keeping these stakeholders engaged takes a lot of work. But is worth it. The person with most to gain is the Project Executive. The Project Executive and PM must work together."	

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15 mins	MET YOUR GOAL MEASURE IMPROVEMENT	Understand there are two lots of pass/fail criteria – short term (project completion) and long term (benefit realisation)	**Lecture:** • **<Slides>** SUCCESS CRITERIA; BENEFITS **Project teams:** • MET YOUR GOAL: List 3-5 red-lines that must be met for you to have met your goal • MEASURE IMPROVEMENT: List 3-5 things you can measure over time to show your strategic objective is met	Benefit measurement continues way after your goals have been met (and your project declared complete)	
5 mins	CANT'S	Understand there are practical limits and you need to agree these up-front	**Lecture:** • **<Slide>** CONSTRAINTS **Project teams:** • CANT'S: List any constraints you want to impose (time, cost, resource)		
	Recap (THINK)	Understand you should THINK before starting to PLAN	**Group discussion:** • Any questions • Stress the importance of always asking WHY and how you MEASURE IMPROVEMENT	Yes it is hard! Give an example from your career when this has been done well or badly	
5 mins	CHEAT	Understand there is no shame in copying!	**Lecture:** • **<Slide>** LESSONS LEARNED **Group discussion:** 2 minutes per group project – who could they learn from? (write into **worksheet**) Do you CHEAT in your every day work? Why not?	Give an example where you have learned from someone else – how did you feel asking; how did you feel later?	

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20 mins	HOW	Understand how to break something into chunks	**Group discussion:** • How do you eat an elephant – bit by bit! • "What do we need to do to fly to the moon?" – lead creation of a work breakdown structure on a **flipchart.** (Split into rocket, ground control, astronauts, voyage). **Lecture:** • **<Slide>** PLAN; EXAMPLE PLAN **Project teams:** • HOW: Draw a small timeline. No more than 10 activity boxes. Put estimated duration & cost on each. Calculate total estimated duration & cost of your project – jiggle until it fits within your constraints	Some people find breaking into chunks easy – some really struggle. So take your time if you need to. If advanced group ask who has example of something they had to do where they had no idea how to start? Who has an example of how they have broken down a problem into smaller chunks? An approach is to write tasks on postit notes then move them about and put them in the right order	
10 mins	WHO NEED EXPERTISE	Understand you need to build a diverse team – and you must ask for the things you will need	**Lecture:** • **<Slides>** RESOURCES; TEAM; TEAM STRUCTURE; EXPERTISE **Project teams:** • WHO: list your team • NEED: list what money, technology, permissions you need • EXPERTISE: list what you will 'buy-in' (or will you do it all yourself?)	Give an example of a business case you have been involved in. What did you learn to do differently next time?	
5 mins	**Recap (PLAN)**	Understand PLAN takes lots of time and is hard!	**Group discussion:** • Any questions? • Stress – don't be tempted to rush into starting something. Keep patient – but don't go overboard as your plan will likely evolve	Give an example from your career when you have been tempted to start doing – before you have finished planning	
1235-1315	**LUNCH** ……				

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10 mins	IN CHARGE	Understand the PM is responsible for making it all happen & what skills they need	**Lecture:** • **<Slide>** THE PROJECT MANAGER **Group discussion:** • What skills does the person in charge need? • Do they need to be an expert in the thing they are delivering? • Add a single name to **worksheet**	Use 'film pictures' slide to steer discussion. Record skills on **flipchart**.	
20 mins	GO WRONG PROTECT	Understand the PM should live by the risk register	**Group discussion:** • Ask for mitigations to a simple risk. **Lecture:** • **<Slides>** GO WRONG; RISK & ISSUE DEFINITION; RISKS; RISK ACTION PLANNING; ISSUES **Project teams:** • List top 5 risks and a mitigation for each one	Eg I'm flying from the airport at 1000 next Tuesday and there is a risk my train will be delayed – what can I do to minimise the worry? Group mitigations into avoid, accept, reduce, share, contingency plan	
5 mins	HELP	Understand you should always find someone independent who can mentor you and/or give honest feedback on the project	**Lecture:** • **<Slide>** HELP **Group discussion:** • 2 minutes per project - who could help you with your project? • Add to worksheet	• Introduce user representative concept • Get a mentor or coach	
5 mins	**Recap (WORRY)**	Understand being the PM is big responsibility	**Group discussion:** • Any questions? • Stress PM job is all about managing risk	Managing – not necessarily minimising (ie must be comfortable dealing with risk & uncertainty or you will go mad!) Give an example from your career when you have dealt with serious risks	
1400-1410	**BREAK** ……				
5 mins	START	Understand that starting the delivery phase is a big deal	**Lecture:** • **<Slide>** START **Project teams:** • Who gives permission to start your project? • List any break points to check you want to proceed?	Give an example from your career when you have had to obtain 'go for launch' endorsement from a person or panel	

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15 mins	RUN REVIEW & REPORT CONTROL	Understand you must tailor this (governance) to meet your needs & your project needs and the needs of your stakeholders	**Lecture:** • **<Slides>** RUN; REVIEW & REPORT; CONTROL; BOARD **Project teams:** • RUN: List 2-3 things you will do to keep on top of things • REVIEW & REPORT: List 2-3 things you will do to report progress to your key stakeholders • CONTROL: Write down how you will make small & big decisions	Give an example from your career how you are keeping track of things – and keeping all your stakeholders happy	
15 mins	DOES IT WORK	Understand that testing is an activity to do all through the project	**Lecture:** • **<Slide>** DOES IT WORK **Project teams:** • When will you test what you are doing will work? • How can you get early confidence? • How will you sign it off as fully working? • List the key points in your approach to testing	Give an example from your career when you wished you'd started your testing earlier – or when you designed for test all the way through	
5 mins	**Recap (DO)**	Understand that this will be easier if you have put effort into your THINK & PLAN	**Group discussion:** • Any questions • Stress this is all about people – talking and listening; and about clear decision making		
1400-1410	**BREAK** ………				

Time	Section	Aim	Details	Guidance	Teacher notes
20 mins	NEXT STEPS	Understand the transfer to Business As Usual can be the hardest part of your project	**Group discussion:** • **Flipchart** – you finish building a new road and your team is disbanded. 2 columns: BAU activity; how to land this in BAU. Eg what happens to the road? Who looks after it? When do they know about it? Who will tell people they can drive on it? Where will the money come from to maintain it? **Lecture:** • **<Slide>** NEXT STEPS **Project teams:** • List the key things that will have to carry on once you have finished your project – and what you must put in place well in advance for this to be successful.	Remember: Projects are all about people. A successful project will help people to change the way they think or behave. You can't leave this bit to chance. And you must consider this all the way through (even though it is at the end of the worksheet…) Don't forget to measure your strategic objectives…. Give an example from your career where this has or hasn't worked.	
5 mins	LEARNED CELEBRATE	Understand the importance of careful closedown	**Lecture:** • **<Slides>** LESSONS LEARNED; CELEBRATE **Project teams:** • List how you will share your lessons learned • Record how you will celebrate		
5 mins	**Recap (FINISH)**		**Group discussion:** • Any questions • Stress we all need to be better at learning from each other's experiences		
1440-1500	**BREAK** and prepare your 5 minute pitches: You need to convince the other team they should invest in your project. Everyone in your team should speak. *(TEACHER prepares the four flipcharts ready for feedback session)*				
20 mins	5 minute pitches	Understand the need to make a compelling case in a short time	Other team(s) to ask questions.	Keep your eye on the time!	

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15 mins	Have we met objectives	Teacher has confidence in the course and the way they taught it.
		
		Capture improvement points for next time.
			Group discussion:
			• No need for discussion. Ask delegates to write on post-it notes then stick onto **four flipcharts:**
			  - What did you find most useful?
			  - What did you find least useful?
			  - What will you now do differently?
			  - What do you want to learn more about?
			
			Group discussion (10 mins):
			• Do you now feel more confident
			  - Working within / alongside projects
			  - Applying simple PM tools to your current job
			• Have we met your personal objectives on the flipchart
			• Where do we go next – more formal training, mentoring.
			• Please recommend this course to your colleagues
				Do as much listening as you can and as little talking as possible	

1530	**END OF COURSE**				
1530-1600	Contingency, tidy up		• Destroy all flip charts except the 4 feedback charts and the personal objectives chart • Also a good time to record / share your lessons and feedback to save doing it later		
POST COURSE	**Update the guidance for the next teacher (if not done while tidying up)**				