



PMI of Greater New Orleans
Fostering Successful Projects

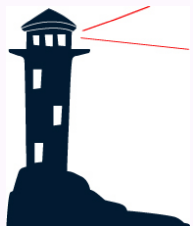
The LavaCon® and Greater New Orleans PMI® Chapter

Professional Development Summit

One Hat, Two Hats or Three....
How Many do you Wear?

Presented by

Eugenia C. Schwalm, PMP® CBAP®

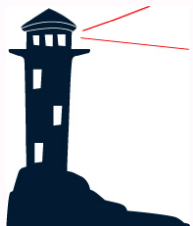
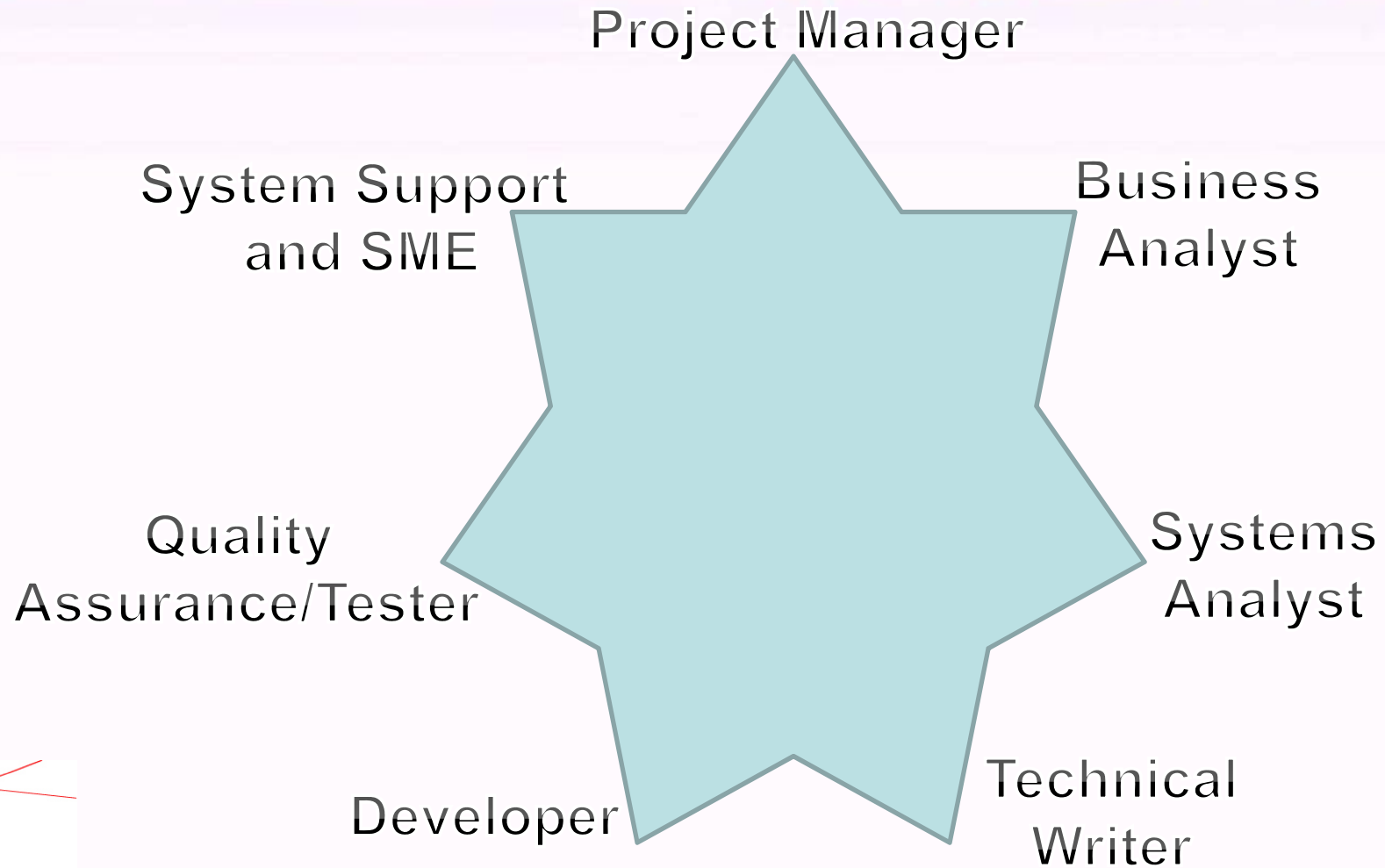


What you will learn from this session

- Techniques to differentiate roles and why it is important
- Tools that will help you understand and communicate risks when you can't do it all
- Applying project management concepts that can help you prioritize your work
- Ways to improve communication with your boss so expectations are managed
- Ways to automate our own work processes through available and inexpensive technology
- And finally, some real life stories of how I have occasionally failed but mostly succeeded when wearing many hats

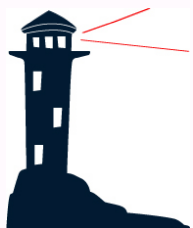


What hats do WE wear?



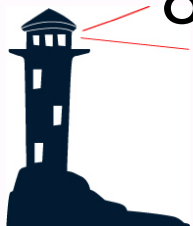
What are the challenges?

- Unidentified risks
- Missed activities
- Missed opportunities to delegate
- Unexpected work
- Rework
- Mismatched expectations
- Inability to plan properly
- Inability to perform activities
- Loss of credibility
- Overworked and stressed



Steps to managing multiple roles

- 1) Delineate the roles and effort expected
- 2) Assess activity gaps
- 3) Assess competency gaps
- 4) Assess and communicate risks
- 5) Develop an approach
- 6) Manage all stakeholder expectations
- 7) Capture lessons learned
- 8) Show your flexibility and value

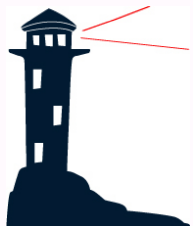
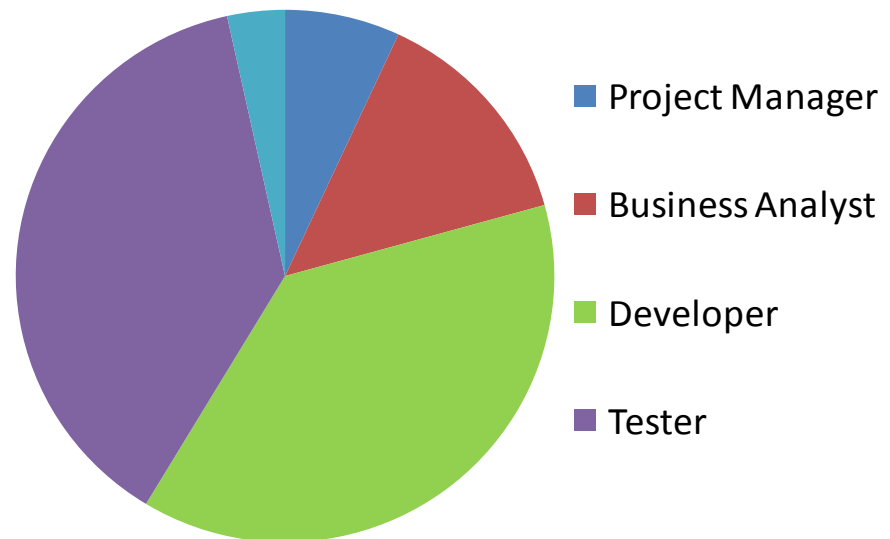


Step 1: Delineate the roles and effort

Project needs vs. individual experience
– is there a gap?

Account for the “part-time”
affect (up to 25% more
effort for multi-tasking).

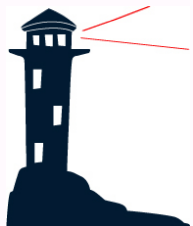
Distribution of hours for one person
assigned these roles



Step 1: Reality

At PricewaterhouseCoopers – typical roles:

- 30% - Engagement Manager
(managed other project managers)
- 30% - Project Manager
(billable to specific client for software evaluation)
- 20% - Business Analyst
(same software evaluation project)
- *10% - Technical Sales Support
- *10% - Managed and coached four consultants



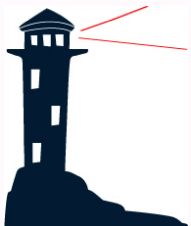
*What about non-project related time?

Step 2: Assess activity gaps

If you perform in the role, you must gain an understanding of the associated processes.

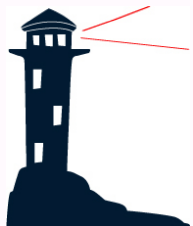
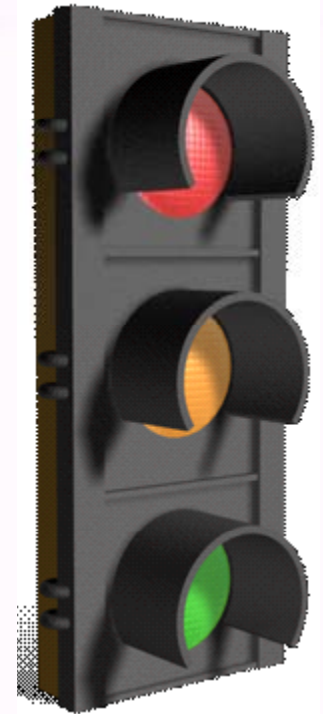
1. Internal SDLC standards or RACI charts (project role definitions and expected deliverables)
2. Industry best practices for roles (such as: PMBOK® or BABOK®)
3. Books and research
4. Compare to expectations and your own knowledge (gap analysis using the WBS and Network Diagram)

Past or Present State	Gap and/or Method to Resolve	Present or Future State



Step 2: Reality

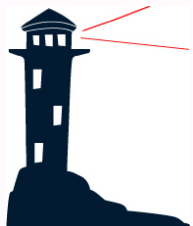
- Engagement Manager:
One project failure under my watch.
- Project Manager:
Success on managing tradeoffs with client
- Business Analyst:
Future defects based on lack of
requirement detail.
- Other roles in “reactive” mode only



Step 3: Assess competency gaps

If you perform in the role, you must gain an understanding of the associated competencies – especially the soft skills.

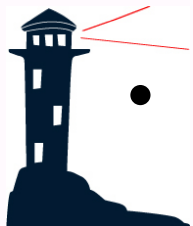
1. Industry best practices for roles (such as: PMBOK® or BABOK®)
2. Find an internal expert
3. Check job descriptions or self assessment tools
4. Compare to expectations and your gathered information (gap analysis of competencies)



Past or Present State	Gap and/or Method to Resolve	Present or Future State

Step 3: Reality

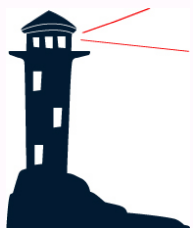
- Engagement Manager
 - needed training and tools for multiple projects
- Project Manager
 - expert competency
- Business Analyst
 - should have consultants some experts for this type of project.
- Technical Sales Support
 - needed to be proactive on finding opportunities
- Managed and coached four consultants



Step 4: Communicate risks

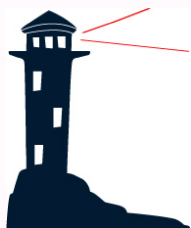
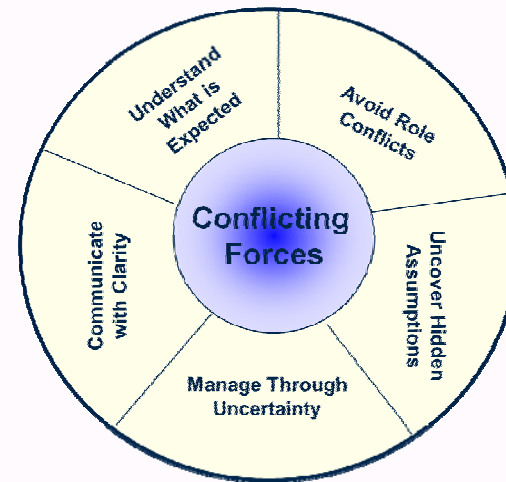
You don't need to be an expert, but you must understand the risks for skipped tasks.

1. Assess risks for missed tasks
2. Build your own risk plan
3. Communicate tradeoffs to management
4. Manage expectations throughout the project's life cycle



Step 5: Develop an Approach

- Develop an approach to address role conflicts based on gap assessment and risks
- Develop a repository of information for future role conflicts

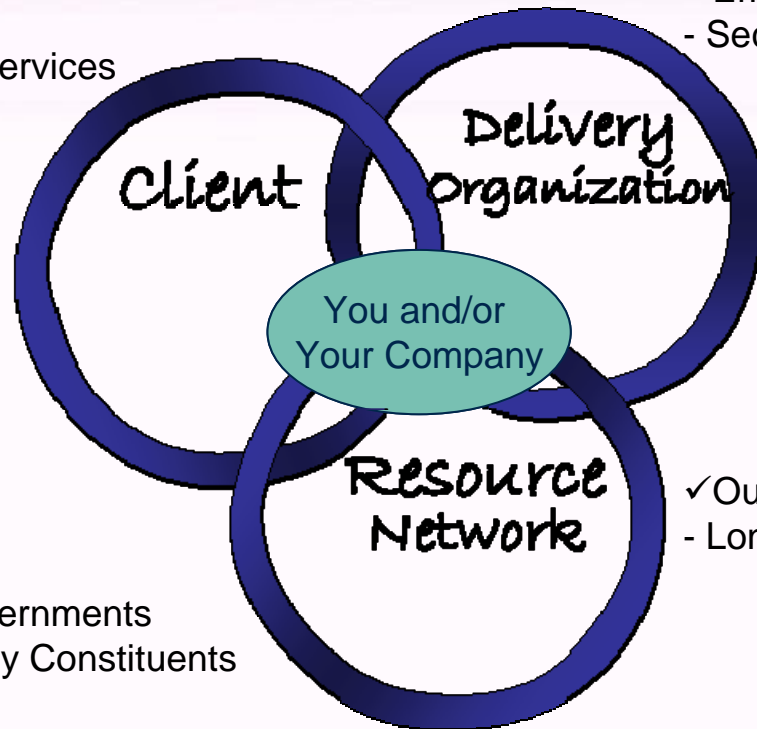


Step 6: Manage Stakeholder Expectations

- ✓ Customers
- Better Products and Services

- ✓ Employees
- Secure Jobs

- ✓ Business Owners
- Return on Investment



- ✓ Project Team
- Career Opportunity

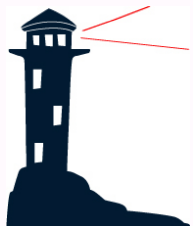
- ✓ Communities
- Better Services

- ✓ Outsourcing Vendor (s)
- Long Term Relationship

- ✓ Governments
- Happy Constituents

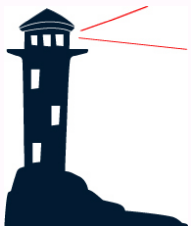
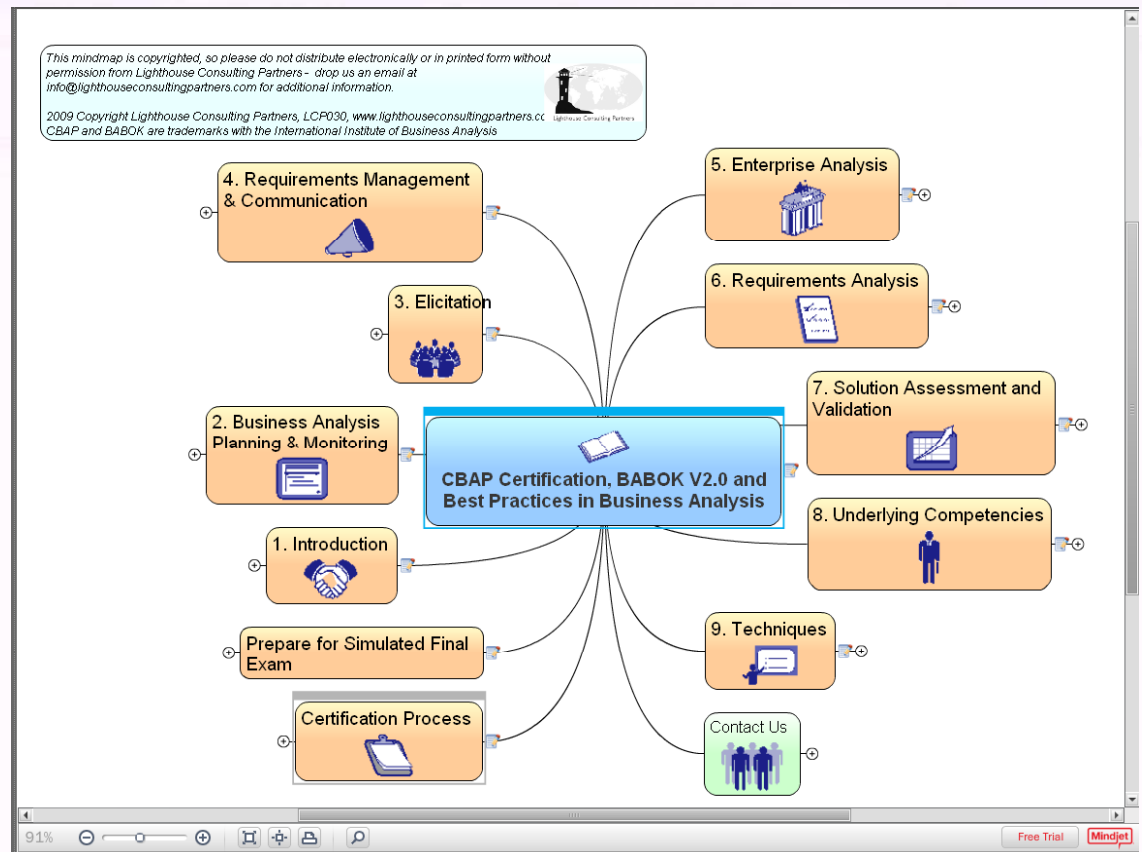
- ✓ Suppliers
- Bigger Profit Margin

The Consultant Communities Model helps manage the demands of community members



Step 7: Capture lessons learned

- Tool that I use:
Mindjet's
Mind
Manager

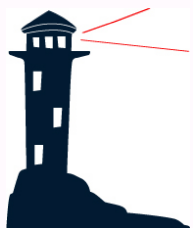


Step 8: Show your flexibility & value

A clear statement of tangible results from the community member perspective.

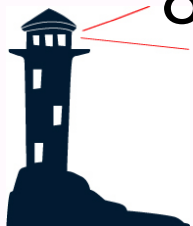
- From the Community Member Perspective
- Prioritize based on risks and value
- Show your flexibility in accepting new roles

Value Proposition (Qualifications)	Value to Client	Value to Delivery Organization	Value to Resource Network



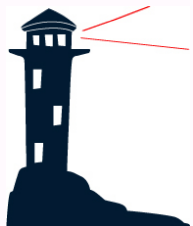
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Polling

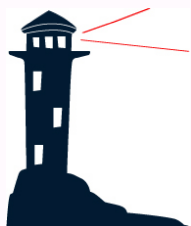
Which roles to you have conflicts with?





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THANK YOU – Any questions?

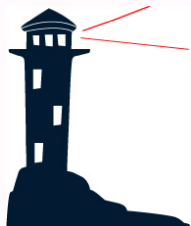




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Seminar References

Some resources...

- Project Management: www.pmi.org
- Technical Communications: www.stc.org
- Business Analysis: www.theiiba.org
- Systems Engineering: www.incose.org
- Software Quality Assurance: www.softwarecertifications.org
- Management in Technology: techrepublic.com.com

Thank you for attending this seminar!

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