



Project Management Essentials Workbook

A BEGINNERS GUIDE TO APPLYING
PROJECT MANAGEMENT TO EVERYDAY
WORK

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Introduction

Welcome to your 'course in an ebook'. In this workbook you will learn some very important project management terms to get you started practicing your project management skills in the real world. We will explore the meaning of a project and the various roles and responsibilities of people on the project team.

At the end you should be able to identify a project and start recognizing the different team members and their roles.

You will have a better grasp of confusing terms that will help you dispel the myth that project management is a difficult topic.

Save this booklet on your computer in a place where you can easily access it.

Now let's get started!



Section 1: What is a Project?

The first step in developing effective project management skills is to have a workable definition of what a project is:

A project is a sequence of tasks with a defined beginning and end, bounded by time, resources and desired results.

As a result project management can be defined as:

A process of combining systems, people and techniques to complete a project within established targets of time, budget and quality.

Characteristics of a Project

All successful projects share the following main characteristics, unique and temporary, this means it is new and it has a beginning and an end. Other features of a project include:

- Clear goals
- Defined ownership / responsibility
- Definitive time line
- Team
- Defined methodology
- Control
- Completion
- Linked to business objectives
- Supported by the management

Projects in an Organizational Context

Even the most basic glance at organizations will highlight that most corporate activity is based on projects. Effective management of projects will therefore impact on issues such as profitability, customer satisfaction, resource utilization, participation, and resistance to change. Therefore having an effective project management process is critical to success.

Projects in an Organization

- Effective management of projects will impact on:





Practice Notes

1. In your own words describe 'what is a project and include the main characteristics of a project'

2. Name 1 projects you are working on now (remember anything can be projectized as long as it has the 2 main characteristics of a project)



Section 2: People In The Project

Now that we have introduced the basic characteristics of projects we now need to explore one of the most important parts of any project – the project team.

Team Skills

The Project Team should be selected so as to provide:

- The required skills
- Synergy
- Support network
- Knowledge bank
- Motivation

Member's roles need to be clear to facilitate the project management process.

Team Structure

A successful project team will have most or all of the following characteristics:

- Clear goals
- Clear roles
- Professional relationships
- Clear decision making system
- Involvement
- Communication capabilities
- Excellent working methodologies
- Logic and attention to detail
- Trust

Team Roles & Responsible

Now let's look at the roles and responsibilities of these members in more detail. It is important to note that not all organizations will have the structures to accommodate all these titled positions on a team. However it is important that all roles are catered for within the team.

Project Steering Committee

This group of people is responsible for:

- Ensuring that the project is planned
- Ensuring that the project is resourced
- Providing guidance throughout the project
- Adherence to any regulatory guidelines
- Conformance with corporate guidelines

Project Sponsor

The project sponsor is usually a senior manager who can:

- Provide a link to the project steering group
- Generate and provide support at high levels
- Authorize sign-offs by the project manager
- Act as a sounding board for the project team when issues need to be discussed

Project Manager

The project manager is responsible for the day-to-day operation of the project and in most cases the value delivered.

Let us look at some roles that maybe used to different these project managers:

The project manager overseas the project team and is responsible for the value created by the project. She is responsible for ensuring the project comes in on time, within budget and scope. In an organization using scum or an agile methodology, the project manager may oversee the output from the product owner and the scrum master. The project manager's role includes:

- Controlling the schedule
- Managing the personnel
- Assigning tasks
- Chairing project meetings
- Monitoring project activity
- Involvement in making key decisions

The Project Manager manages a project on a day-to-day basis and is the only one with this day-to-day focus on the project. As a result, this role can never be shared. The Project Manager runs the project on behalf of the Project Board within specified constraints and liaises throughout the project with the Project Board.

Source: <https://prince2.wiki/roles/project-manager/>

Product Owner

The product owner communicates and clarify the vision and goals of the product. The product owner is accountable for the success or failure of the product.

Scrum Master

A Scrum master is a facilitator and coach who helps the Scrum team, the product owner and the organization understand and apply Scrum practices.

Finance Administrator

The management of the financial aspect of the project may lie with the Project Manager; however for larger scale projects it is better to have a specific financial expert to:

- Manage the accounts
- Prepare financial reports
- Monitor variance from the set budget
- Be involved in cost-benefit analysis activity when any changes occur

Communications Administrator

The ability to communicate well is essential for the project to succeed. In larger projects assigning responsibility for communications to a person ensures that communication:

- Is a priority for a specified person
- Can be planned.
- Can be executed on time
- Can utilize different methodologies / channels
- Can be measured for effectiveness

Documentation Administrator

The amount of documentation associated with a project may entail that a specific person is assigned to manage the documents. This would involve:

- Liaison with the project manager and communications administrator
- Control of documents such as plans, specifications, budgets etc
- Filing and maintenance of project records
- Back-up and safe storage of all documents both hard copy and electronic

Scheduler

The scheduler would be responsible for ensuring that:

- Plans translated into workable schedules
- Schedule problems are highlighted in good time
- The introduction of specified contractors into the project is managed
- Information re: progress according to the schedule is accumulated and delivered to the project manager
- Any amendments to the schedule are communicated to the project manager

Support Systems Administrator

The role of the support system administrator would be to ensure that:

- All IT systems are operational
- All staff are capable of using the support systems
- Liaison with the documentation administrator re: the back-up and storage of electronic copies of information
- Relevant software is available and functional

Quality Administrator

The implementation of best practice through a functional quality system will enhance the operation of the project. The Quality administrator will be responsible for:

- Quality Control procedures
- Measuring and reporting on quality metrics
- Assessing the actual output versus planned output for the project
- Linking with the documentation, support and communication administrators
- Providing information on quality issues to the project manager

Please note that the list of roles and responsibilities are not exhaustive and may include many more or even less. Your team should be tailored to meet the needs of your project.

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Your Notes

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Congratulations! You have completed the steps required to understand the concept of project management and know the different players and their roles and responsibilities.

By reading and completing the practice exercises in this workbook, you have taken the first step toward becoming an effective member of leader of a project team.

If you would like help in becoming a project manager, scrum master, product owner or any member of a project team, visit our website and register for an upcoming course.

Contact me (Sherrone Blake Lobban) on LinkedIn [@sherronelobban](#) and let me know how you have used this workbook and your achievements so far.



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