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# Introduction to Project Management and Project Action Plan

Dr. Kai Handel

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# Outline

- Very short overview over classical and agile Project Management
- A “practical” approach to Project Management and Project Action Plan
  - a project as a journey (“over the fence”)
  - the project canvas (from IDC)



# What is Project Management?

# What is a Project Management? (Literature)

- There are thousands way to describe and define, what a project is and about as many books on “Project Management”
- Comprehensive **academic works** like:
  - Wysocki, Robert K. (2009): Effective Project Management. Traditional, Agile, Extreme. 5. Aufl. Indianapolis: Wiley.
  - Over 700 pages, every detail covered
- There are **web-pages with** very short explanations and guidelines (often to sell software or consulting services)
- There are **middle ways** which are clear and somewhat comprehensive but not too academic. I like:
  - Habermann, Frank; Schmidt, Karen (2018): Over the fence. Rediscover the joy of projects, develop new ideas better, and have more fun working together. the completely new revised edition of The Project Canvas. Berlin: Becota GmbH.
  - Easy understanding of a project, Story line, Graphical representations, Easy Explanation “what to do”

# What is a Project Management? (ChatGPT)

- Project management is a discipline that involves the planning, execution, and control of projects. A project is a temporary endeavor with a specific goal, a defined beginning and end, and usually constrained by factors such as time, cost, and resources. Project management is essential for ensuring that projects are completed efficiently and successfully.

- Key aspects of project management include:

## **1. Project Initiation**

## **2. Planning**

## **3. Execution**

## **4. Monitoring and Controlling**

## **5. Closing**

ChatGPT 3.5, shortened, 17.11.2023



# A Project as a journey – and the PAP Canvas

Following:

- „Over the fence” - Rediscover the joy of projects, develop new ideas better, and have more fun working together.
- IDC Project Action Plan Canvas

## What is a Project? (Graphical representation of a project as a journey)



# What is a Project?

## (Some important characteristics of a project)

Every project has

- a **purpose** – a goal/scope – to create something “new”.
- a **“customer”** (someone who initiates and finances the project and receives/profits from the results) – sometime also summarized as “stakeholder”
- a **timeline** with a beginning and an end – with milestones/waypoints in between.
- milestones/waypoints always give you the opportunity re-orient yourself
- The most important projects are too big for a single head;
  - they need beside the **project manager** a whole **team** of people to master the challenge.
  - **budget** and other **resources** are also necessary.
- Every endeavor takes place
  - under certain **conditions** in an **environment**
  - There are always **chances and risks**.
- And finally, there will be the **result** with certain (predefined) **qualities**.



# The Purpose (Objective) of the Project

- Why is the project needed? (cause, motivation, reason)
  - Why is it important, meaningful and valuable? – and for whom?
  - How will the project change the future – and for whom?
  - What is the project about?
- Think **SMART** (= **s**pecific, **m**easurable, **a**chievable, **r**elevant and **t**ime-bound)
- PAP Canvas:
  - To which challenge is this project answering?

**Project title: Name:**

**Date:**

**Version: 1.0**

**1) Objective:**

1) To which challenge is this project answering?

# Customer (Sponsor/Owner/Recipient)



- Every project needs (at least) one customer.
  - Without any customer, there is no project!
  - Project customers are always people – never departments, organizations, or other abstract entities.
  - We can neither speak with departments, nor argue or talk things over with organizations. We can only do that with people.
  - Thus it is important that we discover which people initiate and end (owner), finance (sponsor), and receive (recipient) the results of the project.





# The Stakeholder

- Stakeholders may be defined as any individual or group of individuals either impacted upon by the university or able to impact achievements of its objectives. (Seres 2019)
- Stakeholder = “those groups without whose support the organisation would cease to exist” (Stanford Research Institute in 1963)
- “Stakeholders, whether acting alone or as part of a collective, have the power to make an organization succeed, just as they have the power to make an organization fail.” (Franklin, 2020)

• PAP Canvas:

• **Who are the stakeholders?**



Project title: Name:

Date:

Version: 1.0

1) Objective:

1) To which challenge is this project answering?

Guiding Questions

1a) Who are the stakeholders?

•

1b) What is my timeframe?

•

1c) Which objectives do I want to achieve within the given time?

•

•





# The Result of the Project

- What should the project deliver at the end?
- What will the project sponsor have in her hand on the target date?
- More specific:
  - What type of result does the project generate – is it a new product, an innovative service, or improved knowledge?
  - And what are the fundamental components of this result?
 → It is only when you can clearly and precisely name the result of the project that you can begin it in good conscience.
- → Think **SMART** (= **s**pecific, **m**easurable, **a**chievable, **r**elevant and **t**ime-bound)

- PAP Canvas:
- **Which objectives do I want to achieve within the given time? →**

**Project title: Name:**  
**Date:** **Version: 1.0**

1) Objective:

1) To which challenge is this project answering?

---

**Guiding Questions**

1a) Who are the stakeholders?  
•  
•

---

1b) What is my timeframe?  
•  
•

---

1c) Which objectives do I want to achieve within the given time?  
•  
•



# Timeframe (= boundaries of the project)

- Every project has (should have) a **Beginning** and an **End!** Or?
  - How long does it take to produce a result of the expected quality?
  - When does the project actually start? What will be required (i.e. preparations, documents)?
  - When is the project really closed? What will be required (i.e. documents, approvals)?
  - What is the latest that the result(s) can be delivered to the project sponsor?
  
- PAP Canvas:
- **What is my timeframe?**

Project title: Name: \_\_\_\_\_ Date: \_\_\_\_\_ Version: 1.0

1) Objective:

1) To which challenge is this project answering?

---

**Guiding Questions**

1a) Who are the stakeholders?

- 
- 

1b) What is my timeframe?

- 
- 

1c) Which objectives do I want to achieve within the given time?

- 
-

# Timeframe (→ due dates)



(A) self-determined dates



(B) dates set by others



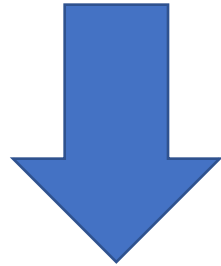
(C) natural dates

# Tool: Gantt Chart

Task Name	Q1 2019			Q2 2019		Q3 2019
	Jan 19	Feb 19	Mar 19	Apr 19	Jun 19	Jul 19
Planning	■					
Research		■				
Design			■			
Implementation				■		
Follow up					■	

→ Also tools in Excel, PowerPoint, MS Project etc.

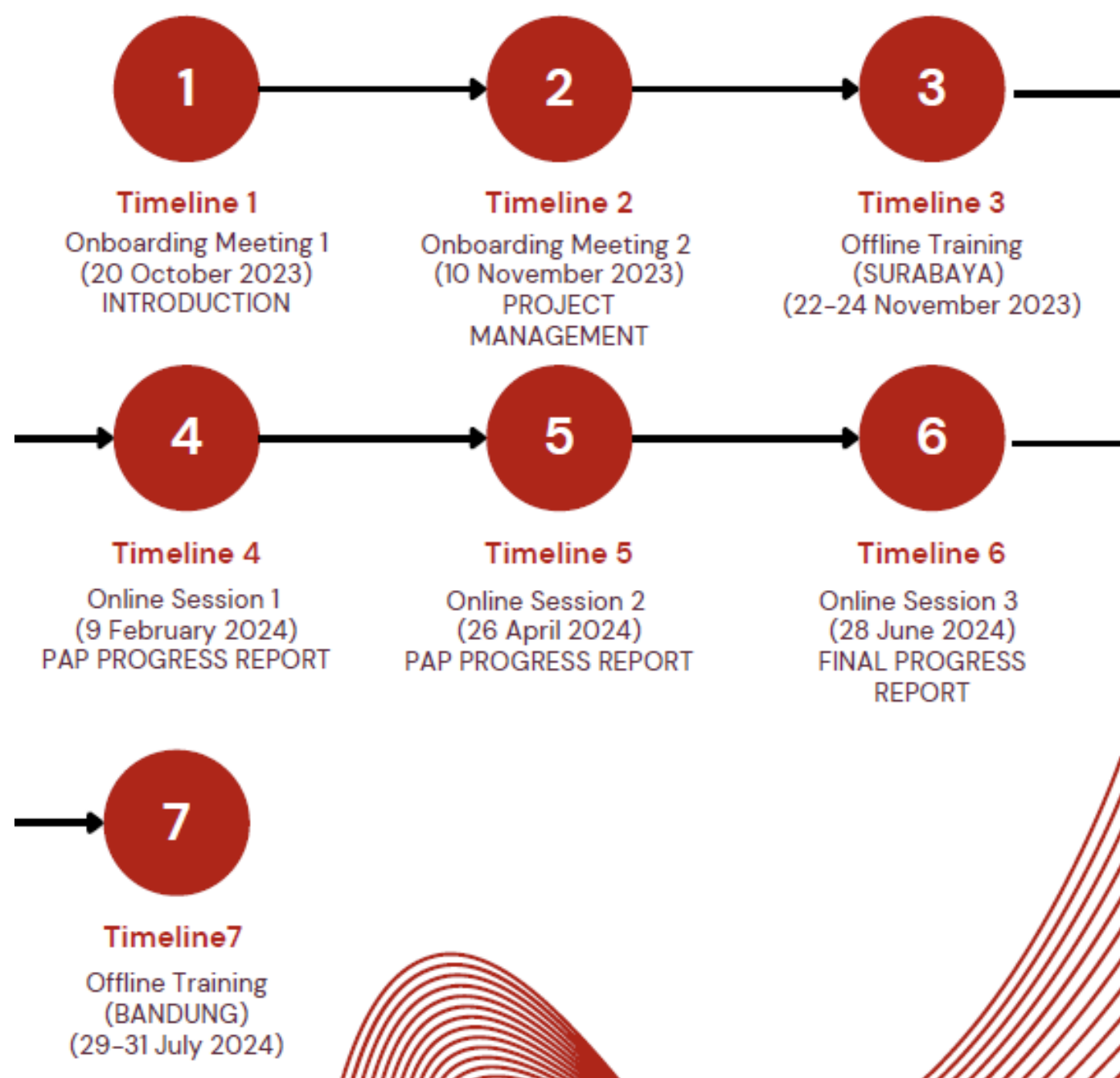
# In the IDC PAP Canvas

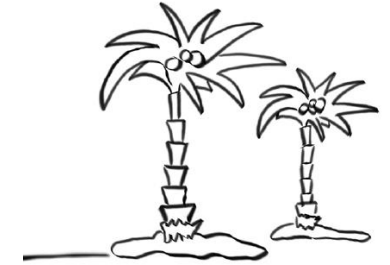


## 3) Key tasks and Milestones

Direct PAP Activities/tasks						Monitoring			
My PAP	My role	When?	Who?	Who else?	Resources needed	How do I recognize it's finished?	Done when?	by	Remarks
<b>Key task 1:</b>									
Task 1.a:									
Task 1.b:									
<b>Milestone 1:</b>									
<b>Key task 2:</b>									
Task 2.a:									
Task 2.b:									
<b>Milestone 2:</b>									

# Timeframe for your Project





# Waypoints/Milestones

- Waypoints or Milestones
  - are special events in a project (→ celebration)
  - they mark important interim or partial results (= significant progress)
  - they mark visual or measurable successes
  - they mark the need for steering decisions
- Waypoints or Milestones subdivide a project timewise and logically.
  - Completion point
  - Delivery point
  - Decision point
- PAP Canvas:
- **Key tasks and milestones? →**

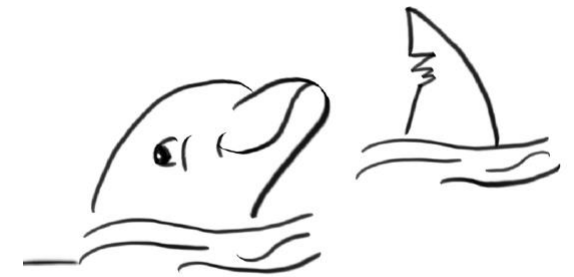
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Key task 1:									
Task 1.a:									
Task 1.b:									
Milestone 1:									
Key task 2:									
Task 2.a:									
Task 2.b:									

# Environment / Risks and Chances



- Every project has its specific environment (=known conditions).
  - Region, industry, organization...
  - people, opinions, relationships, situations, facts, practices, habits, laws ...
- Risks and chances are uncertain events that could influence the project
  - We don't know (for sure)
  - We can not influence
- Which uncertain events would (if they occurred)
  - ... endanger the project?
  - ... stimulate the project?



# Environment / Risks and Chances

- PAP Canvas:
- **SWOT Analysis (external factors)**
  - Opportunities
  - Threats



## 2) SWOT Analysis

<b>SWOT-Analysis (internal factors)</b> 2a) Strengths: 1. 2.	<b>SWOT-Analysis (external factors)</b> 2c) Opportunities: 1. 2.
2b) Weaknesses: 1. 2.	2d) Threats: 1. 2.

# SWOT-Analysis

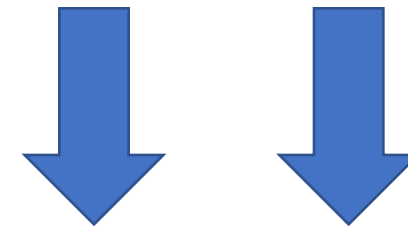
- Should normally be a summary of different strategic (situational) analyses
  - Intern: (Human) resources, capital, abilities, (market position)...
  - Extern: customers, competition, environment, mega trends ...
- Conclusion
  - Intern: Strength, Weakness
  - Extern: Opportunities, Risks

	POSITIVE	NEGATIVE
INTERN	Strength	Weakness
EXTERN	Opportunities	Threats

# Project Team



- Project teams are
  - time limited gatherings of people with different expertise,
  - Most likely have never worked together in this constellation.
- Who should be on it?
  - ... in the core team?
  - ... in the extended team?
  - ... an external partner?
  - ... the project manager?



### 3) Key tasks and Milestones

- PAP Canvas:
- **Who? Who else →**

Direct PAP Activities/tasks					
My PAP	My role	When?	Who?	Who else?	Resources needed
Key task 1:					
Task 1.a:					
Task 1.b:					



# Resources

- Which work equipment and materials are necessary to master the project?

- ... communication tools?
- ... work tools (including software)?
- ... materials?
- ... methods and models?
- ... project work spaces?
- ... meeting spaces (on-site/virtual)?

- PAP Canvas:
- **Resources needed** →

# Budget

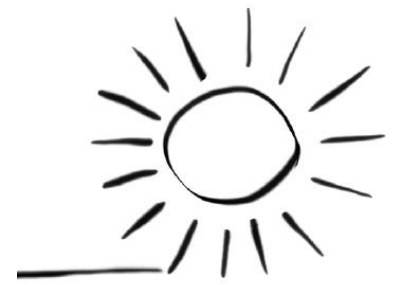


- How much money is available?
- How flexible is the budget?
- How much money is needed for
  - the Team
  - the Resources



### 3) Key tasks and Milestones

Direct PAP Activities/tasks					
My PAP	My role	When?	Who?	Who else?	Resources needed
Key task 1:					
Task 1.a:					
Task 1.b:					



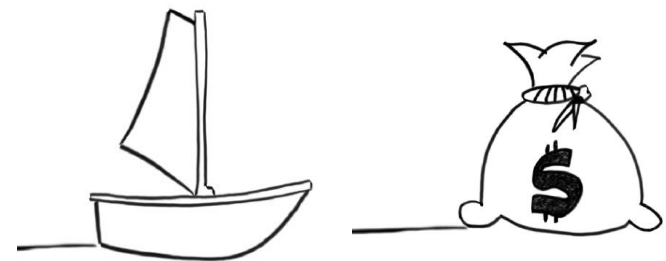
# It's always about Quality! But, what is Quality?

- Quality is delivered by what the project achieves and how it is getting there.
- Quality is not absolute – it is “what makes the customer happy”  
→ usually very different to “what the experts think is right”!

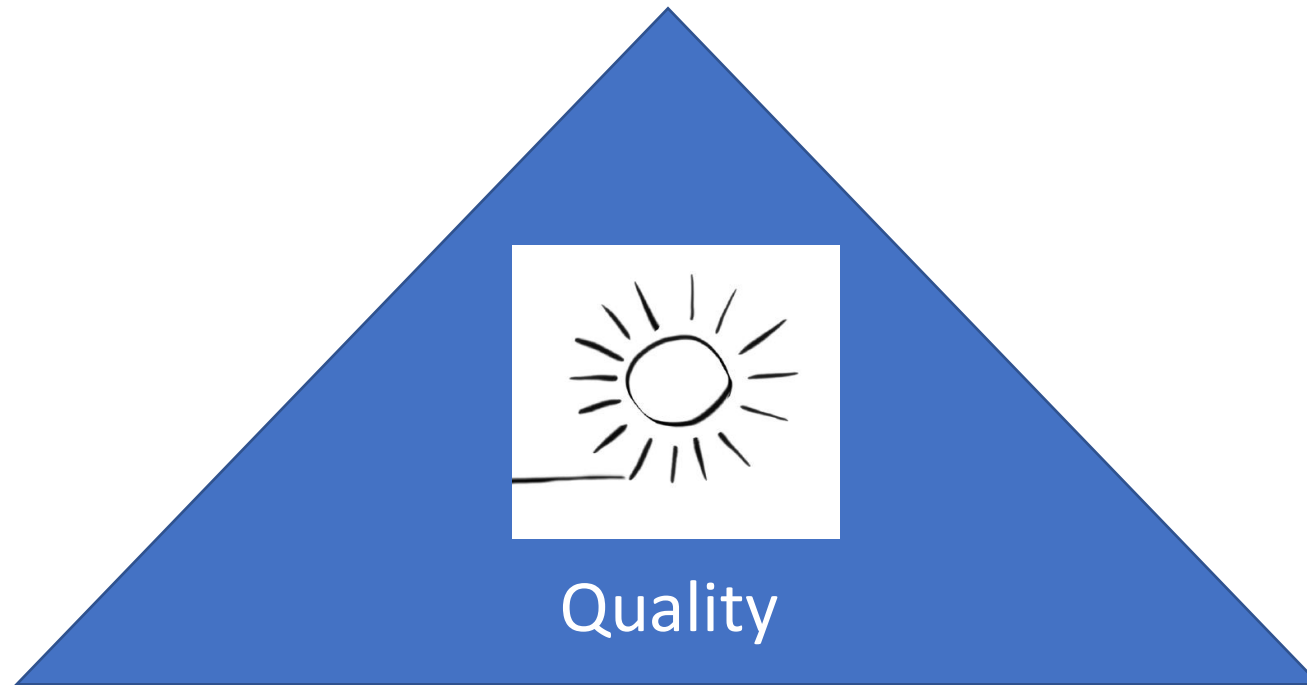
# The „magic“ Triangle



Result / Purpose



Budget / Resources



Quality



Timeframe

# What is a Project? (Graphical representation of a project as a journey)





# Ready für your Project?

Discussion



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# Thank you for your kind attention!

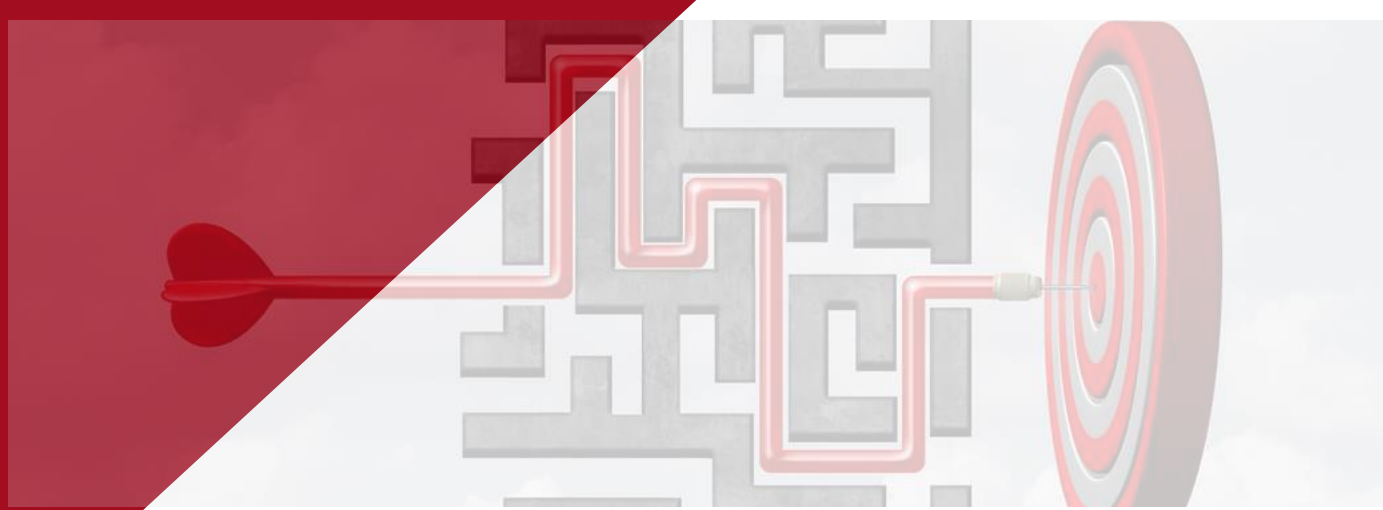
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# Some Literature

- Habermann, Frank; Schmidt, Karen (2018): Over the fence. Rediscover the joy of projects, develop new ideas better, and have more fun working together. the completely new revised edition of The Project Canvas. Berlin: Becota GmbH.
- Timinger, Holger (2017): Modernes Projektmanagement. Mit traditionellem, agilem und hybridem Vorgehen zum Erfolg. 1. Auflage. Weinheim: Wiley. Available online at <https://ebookcentral.proquest.com/lib/kxp/detail.action?docID=4983278>.
- Wysocki, Robert K. (2009): Effective Project Management. Traditional, Agile, Extreme. 5<sup>th</sup> ed. Indianapolis: Wiley.



# Additional Material



# Project Management

(at Higher Education Institutions)

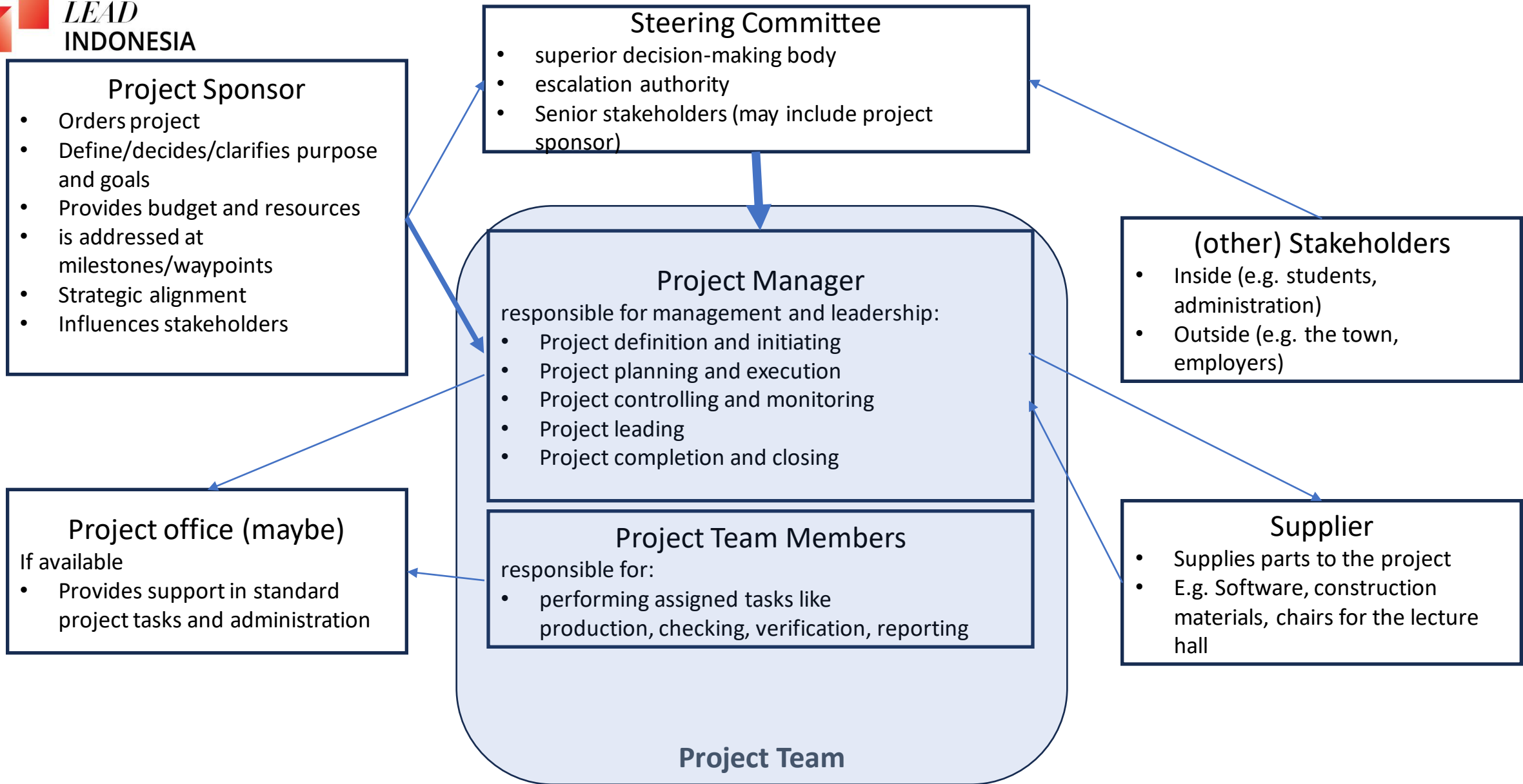
# Summary on (classical) Project Management

Why should we do Project Management in Higher Education management?

- To achieve goals within a given time, to introduce something new (change).

How do we do Project Management?

- Plan: project with different people, outside the routine hierarchy.
- People: Including dynamics of how they collaborate and communicate.  
(Tasks and skills, Time and commitment, Expertise and responsibility)
- Power: Lines of authority, decision-makers, organigrams, policies for implementation and the like.  
(Stakeholders, Project sponsor, Steering committee, Project manager, Project Team ...)
- By using Project Management tools, introducing project communication routines, looking not only at project progress but also at the risks – to ensure success.



# Project Communication

- We communicate a lot (with nearly everyone):
  - Kick off meeting (everyone)
  - Weeklies (Jour Fixe) – each 1-4 weeks (project team)
  - Monthly memos – short updates to sponsor and stakeholders
  - Delivery reports – every 1-3 months, report progress to steering committee
  - “Stocktakes” – meetings every 1-3 months, sponsor and project team, to present progress, to achieve commitment, to make decisions
  - Closing of the Project (achievements)
  - “Post mortem analysis” – after the project, learn from mistakes and successes

(Frequencies depending on size and timeline of the project)

# Some Helpful methods (in projects)

- **Mind map** for identifying problems
- **SWOT-analysis** to bring order in complex phenomena (originally summary of strategic analysis phase)
- **Stakeholder-analysis** to ensure you involve the right people
- **Card method** to involve others and get order into the problems and solutions
- **Gallery walk** when large numbers of stakeholders are involved
- **Group-work** when colleagues should work on different issues
- **Peer-consulting** with people outside your institution
- **Problem- and solution-tree** to identify the hierarchy of problems

# Some tools

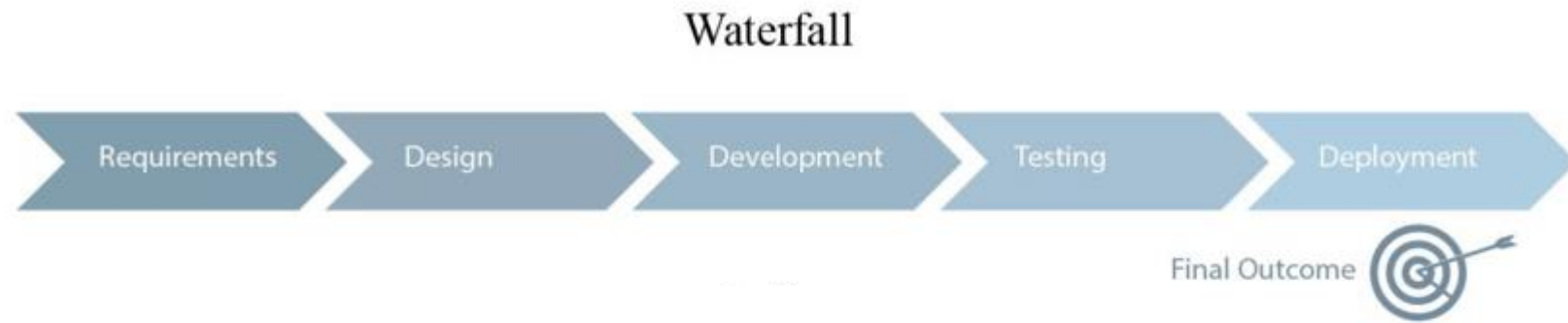


# Agile Project Management???

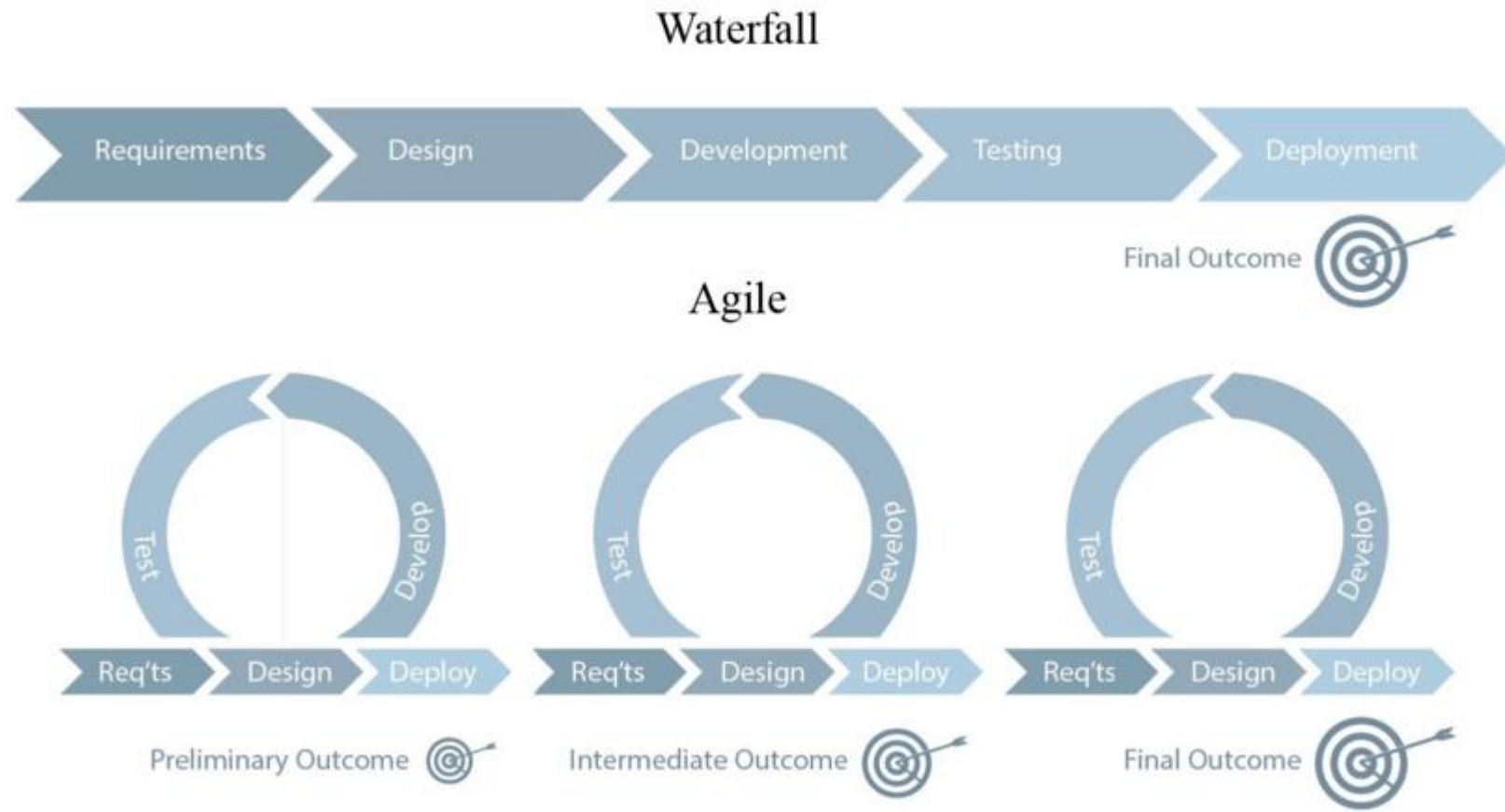
Everybody talks about Agile Project Management?

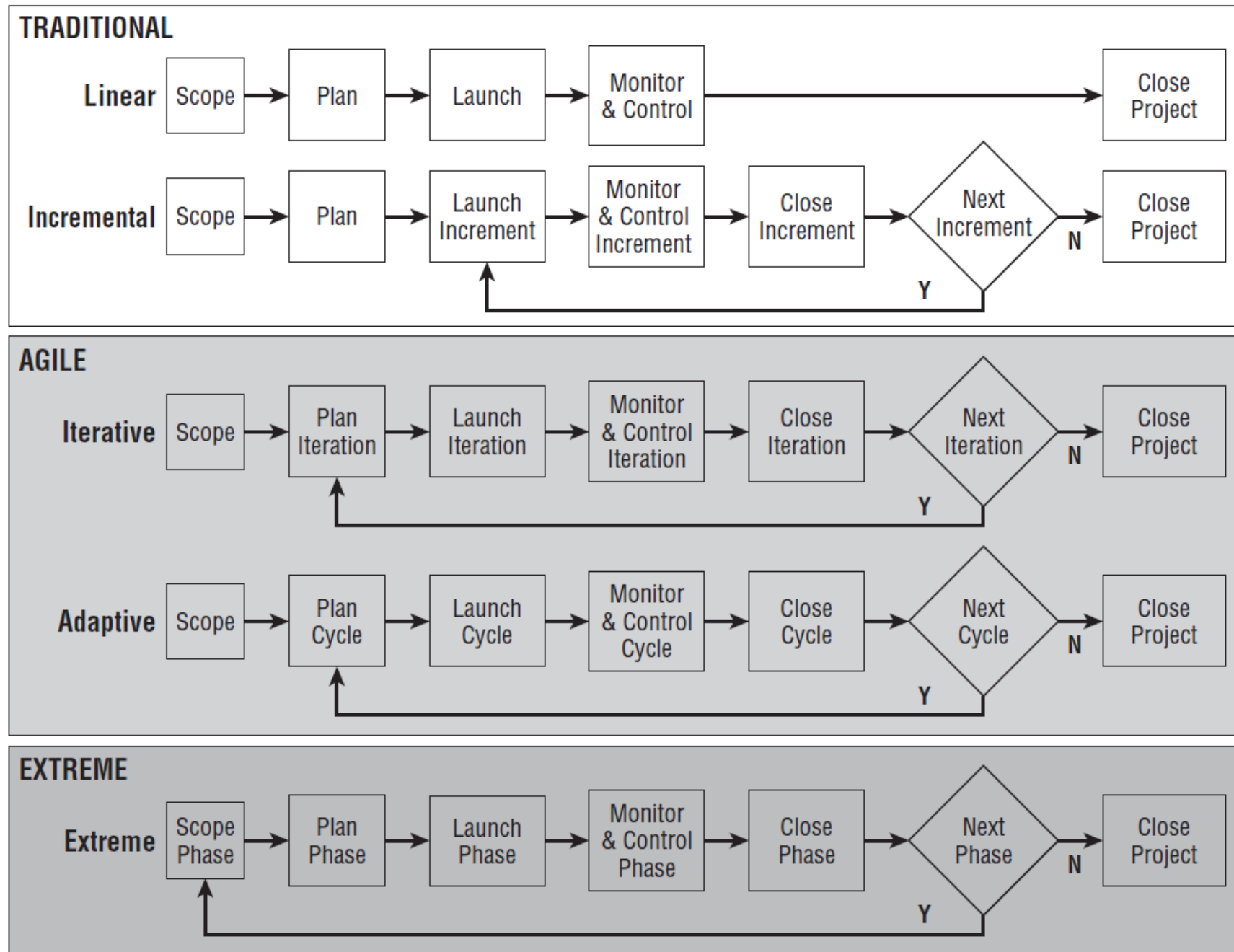
What is different?

# Traditional vs. Agile

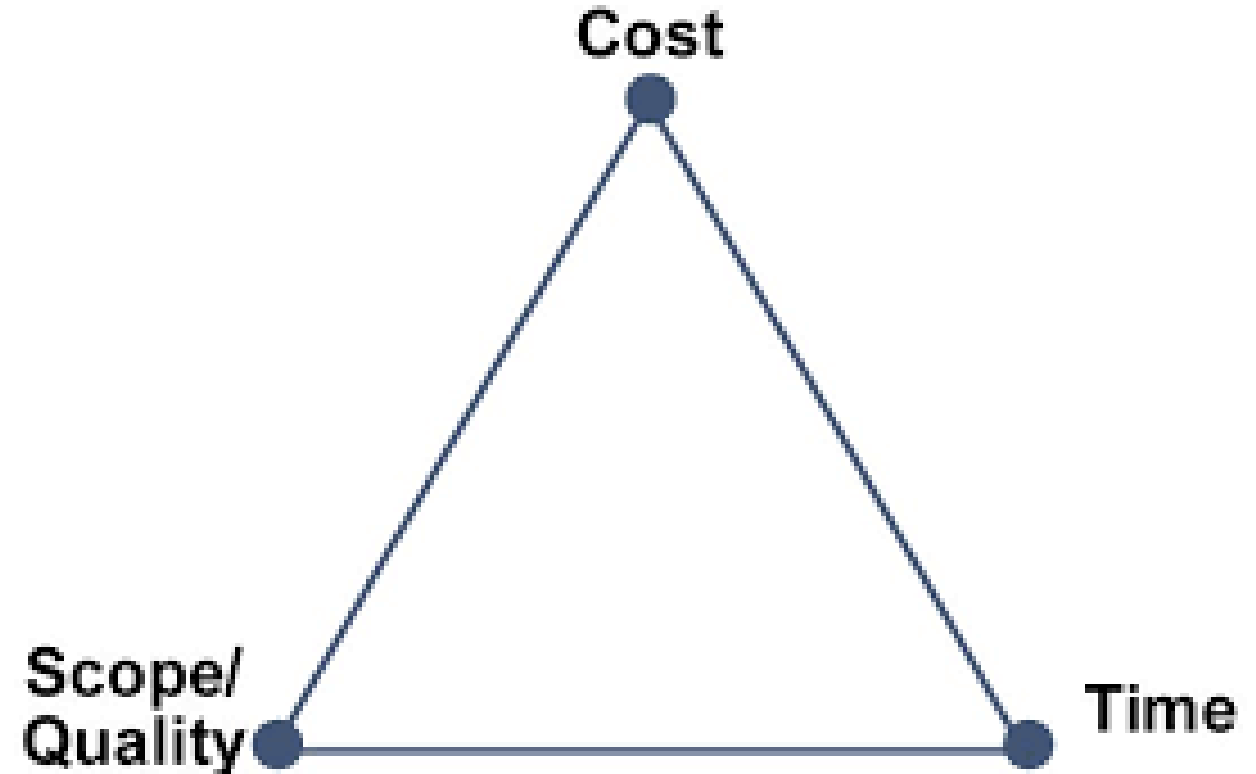
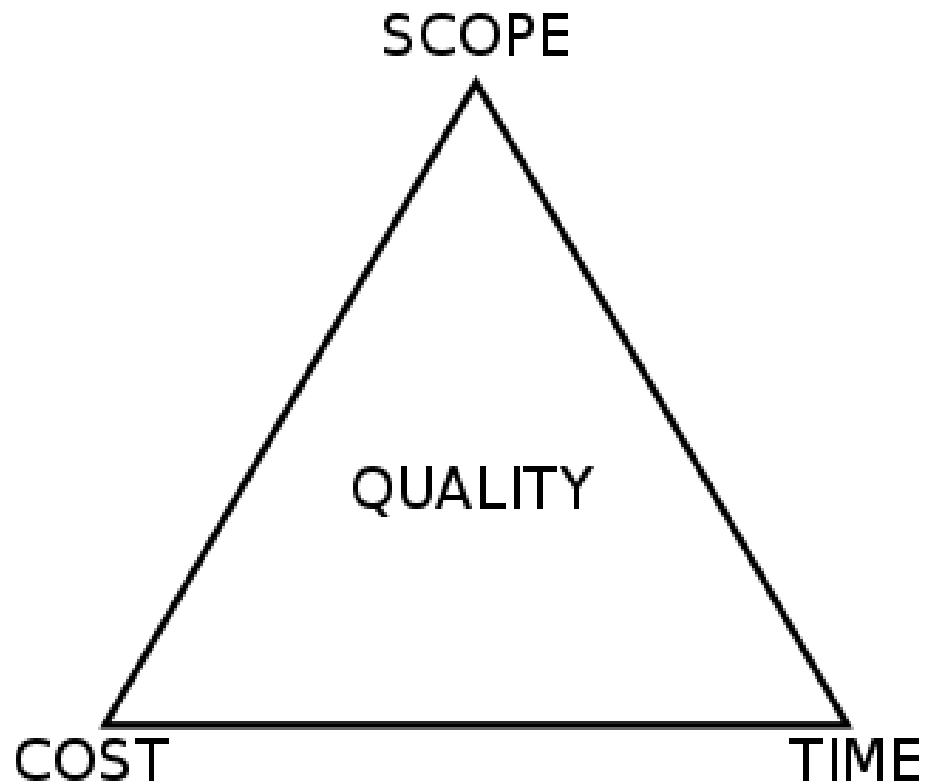


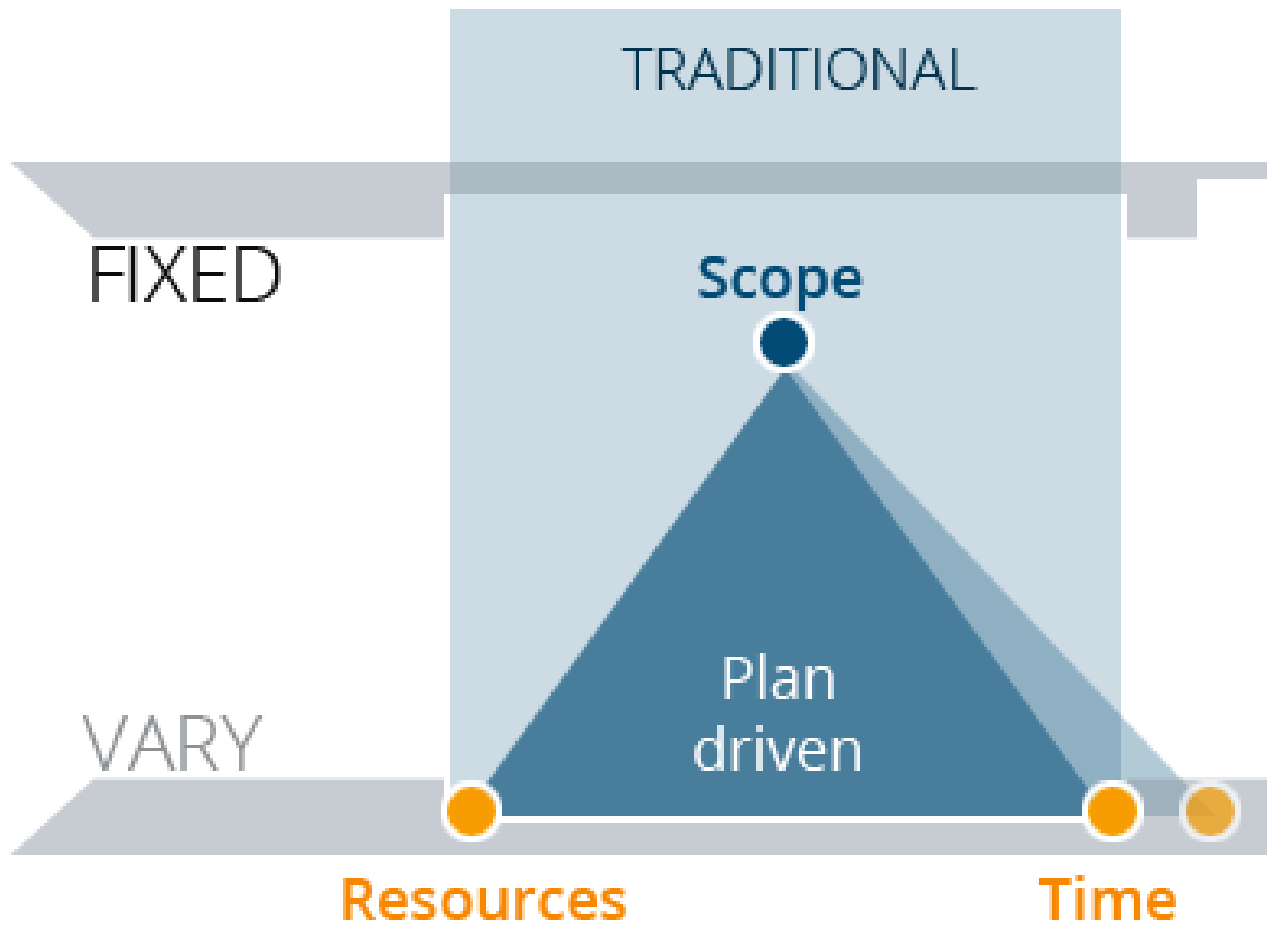
# Traditional vs. Agile

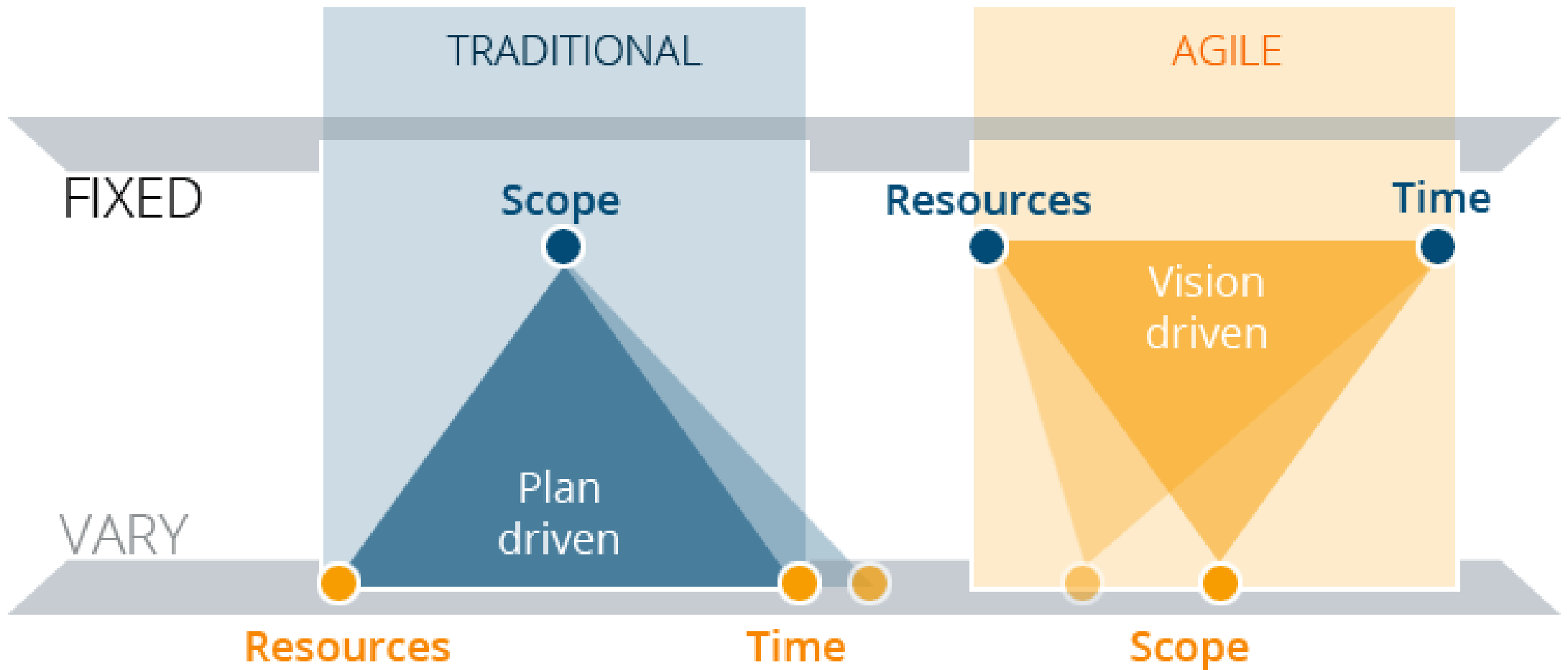





# The Project Triangle







<https://www.microtool.de/en/knowledge-base/what-is-agile-project-management/>



## Classical Project Management

- ✓ SCOPE IS FIXED, TIME AND EFFORTS ARE VARIABLE.
- ✓ LINEAR PROCESS (WATERFALL MODEL). DEVELOPMENT FROM PHASE TO PHASE.
- ✓ PROCESS IS FIXED.
- ✓ INFLUENCE OF STAKEHOLDERS SINKS OVER THE PROJECT DURATION.
- ✓ REQUIREMENTS ARE ONLY RECORDED AT THE BEGINNING (E.G. IN A SPECIFICATIONS SHEET).
- ✓ AT THE END OF THE PROJECT, RESULTS ARE DELIVERED AND EVALUATED.
- ✓ PROJECT MANAGER MANAGES AND TAKES RESPONSIBILITY FOR THE WHOLE PROJECT.
- ✓ COMMUNICATION THROUGH LONG MEETINGS AND DOCUMENTS.

## Agile Project Management

- ✓ TIME AND EFFORT ARE FIXED, SCOPE IS VARIABLE.
- ✓ ITERATIVE PROCESS: PASS THROUGH ALL PHASES IN AN ITERATION.
- ✓ PROCESSES ARE IMPROVED PROGRESSIVELY.
- ✓ INFLUENCE OF THE STAKEHOLDERS IS CONSTANT IN THE PROJECT.
- ✓ REQUIREMENTS ARE CONTINUALLY RECORDED (E.G. THROUGH BACKLOGS).
- ✓ RESULTS ARE REGULARLY DELIVERED AND EVALUATED THROUGH THE PROJECT PROGRESSION.
- ✓ TEAMS MANAGE THEMSELVES AND TAKE RESPONSIBILITY TOGETHER.
- ✓ COMMUNICATION THROUGH SHORT DAILY MEETINGS AND LESS DOCUMENTATION.

# Agile or Traditional – Working on your project could be agile!

- It is up to you.
- All the possibilities are there.
- Depends on your ability
  - to work in short cycles
  - to be flexible concerning the scope/outcome/goal/purpose
  - to motivate a team to take its own decisions
  - ...
- Timeline is fixed → July 2024 final presentation