

# Project Management

Sample



## Corporate Training Materials

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## Preface

### What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

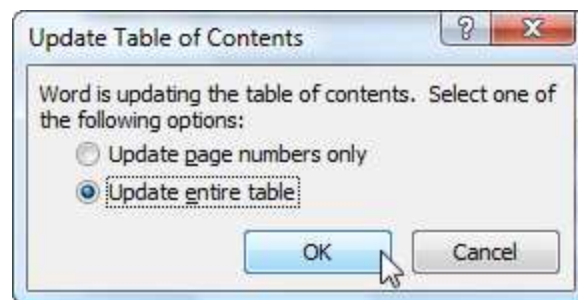
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

### How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

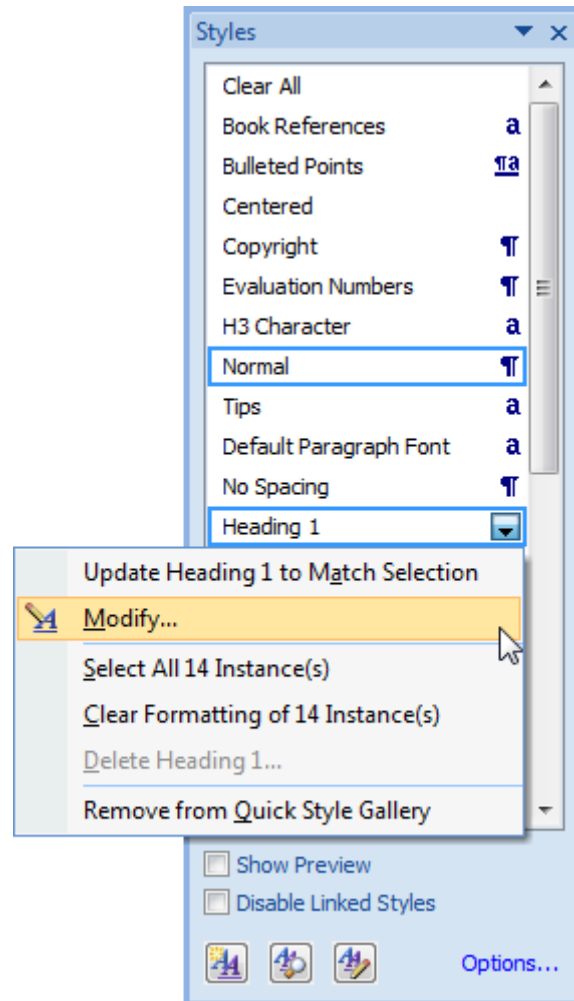


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

## Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

## Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
  - Use examples, case studies, and stories that are relevant to the group.
  - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
  - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest [Experiential Learning](#) by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

## **Icebreakers**

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

## **Icebreaker: Friends Indeed**

### **Purpose**

Have the participants moving around and help to make introductions to each other.

### **Materials Required**

- Name card for each person
- Markers

### **Preparation**

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

### **Activity**

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

## **Training Manual Sample**

On the following pages is a sample module from our Training Manual. Each of our courses contains twelve modules with three to five lessons per module. It is in the same format and contains the same material as the Instructor Guide, which is then shown after the Training Manual sample, but does not contain the Lesson Plans box which assists the trainer during facilitation.

The Training Manual can be easily updated, edited, or customized to add your business name and company logo or that of your clients. It provides each participant with a copy of the material where they can follow along with the instructor.



*Those who fail to plan,  
plan to fail.*

*Anonymous*

## Sample Module: Planning



uncertainty.

Congratulations! With the completion of the SOW, planning worksheet, and project charter, the initiation phase is complete. Now it's time to plan the nuts and bolts of your project.

When building your plan, remember:

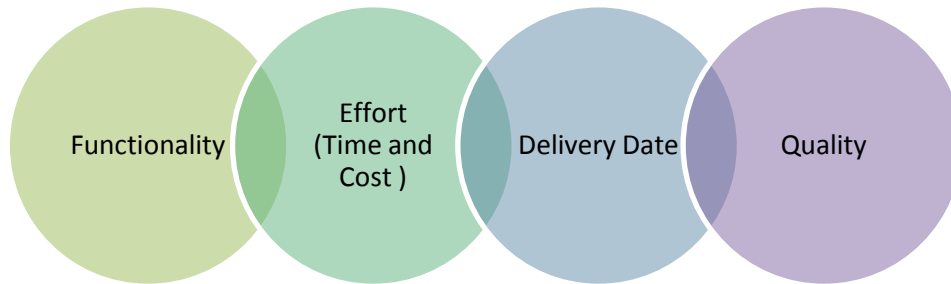
- Everything in the plan is a prediction.
- The only fact that you know for certain is that your plan is definitely not 100% right.
- Contingency needs to be built in to cope with the

## Managing Expectations



Each stakeholder and each project team member will have different expectations. As the project manager, you need to manage all of them. Unmanaged expectations will cause conflict and can cause the project to fail.

Expectations fall into four main categories:



Expectations for each area should be addressed in the Statement of Work, Project Planning Worksheet, and Project Charter.

Periodically reviewing these documents is important. Key checkpoints should include:

- Does everyone involved have the same understanding of the project?
- Clarify responsibilities as assigned
- Clarify the outcomes and time frame
- Clarify the requirements and budgets
- Understand the budget and schedule linkages
- Communicate to everyone who is relevant

## Creating a Task List

To begin the nuts-and-bolts planning process, you must first make a list of all the tasks that are going to be done. Let's say you are going to paint a room. Tasks might include:



- Get paint samples
- Choose a paint color
- Remove all furniture
- Take off trim
- Paint trim
- Apply first coat
- Apply second coat
- Put trim back in
- Put all furniture back in

How detailed the task list becomes is up to you. We suggest writing the task list in the way that you will accomplish it. For example, if you are going to apply the first coat of paint yourself; you may want to include all steps, such as crack-filling, sanding, taping, etc. If, however, you are contracting the task out, "Apply first coat" may be the only item you need to monitor. (Your painter probably wouldn't appreciate being micro-managed!)

## Estimating Time



When building your schedule, never guess times. Gather the most reliable information possible and use a scientific formula to get the best estimate. The better your estimates, the more reliable your plan will be.

This formula is considered the standard for estimating time ( $T_e$ ):

$$\frac{T_o + 4T_m + T_p}{6}$$

- $T_m$  = Probable Time
- $T_o$  = Optimistic Time
- $T_p$  = Pessimistic Time
- $T_e$  = Calculated Time (Best Estimate)

First, make a table, list your tasks, and fill in the estimated time for each. (We have numbered our tasks in the example on the next page for easy identification.) Time can be listed in minutes, hours, days, weeks, months, or years. You should keep the same time scale for each task.

Next, identify what the best and worst case estimates would be. Now, for each task, plug the numbers into the formula given above. The result is the estimated time.

Task	Probable Time	Optimistic Time	Pessimistic Time	Calculated Time
1. Get paint samples				
2. Choose a paint color				
3. Remove all furniture				
4. Take off trim				
5. Paint trim				
6. Apply first coat				
7. Apply second coat				
8. Put trim back in				
9. Put all furniture back in				

## Estimating Resources



Now that the task list is complete, it's time to decide what resources will be used to accomplish the tasks. In project management, "resources" means people, materials, and money. For now, let's just focus on people and materials – we'll look at money in a moment.

A common method of resource listing is to list the tasks, estimated time, and resources required, all in the same table. We have started an example here.

Task	Calculated Time	People Required	Materials Required
1. Get paint samples	1 hour	Me, Joe	Car
2. Choose a paint color	2 hours	Me, Joe	Paint Samples
3. Remove all furniture	1 hour		
4. Take off trim	½ hour		
5. Paint trim	1 hour		
6. Apply first coat	2 hours		
7. Apply second coat	2 hours		
8. Put trim back in	½ hour		
9. Put all furniture back in	1 hour		

How detailed you get with your resource list is up to you. For people resources, make sure you include all people who are going to be spending their time on the project, even yourself.

## Estimating Costs



Our next step is to add cost information to our table. Make sure to include salary information for everyone, even project team members, and to include line item cost information for each material resource. If you are doing a home project (as we are here), salary information will not be necessary.

Task	Calculated Time	People Required	Estimated Cost for People	Materials Required	Estimated Cost for Resources
1. Get paint samples	1 hour	Sue, Joe	\$0	Car	\$10 (gas)
2. Choose a paint color	2 hours	Sue, Joe	\$0	Paint Samples	\$0
3. Remove all furniture	1 hour				
4. Take off trim	½ hour				
5. Paint trim	1 hour				
6. Apply first coat	2 hours				
7. Apply second coat	2 hours				
8. Put trim back in	½ hour				
9. Put all furniture back in	1 hour				

## **Instructor Guide Sample**

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box. Each Instructor Guide and Training Manual mirrors each other in terms of the content. They differ in that the Instructor Guide is customized towards the trainer, and Training Manual is customized for the participant.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

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*Anonymous*

## Sample Module: Planning



uncertainty.

Congratulations! With the completion of the SOW, planning worksheet, and project charter, the initiation phase is complete. Now it's time to plan the nuts and bolts of your project.

When building your plan, remember:

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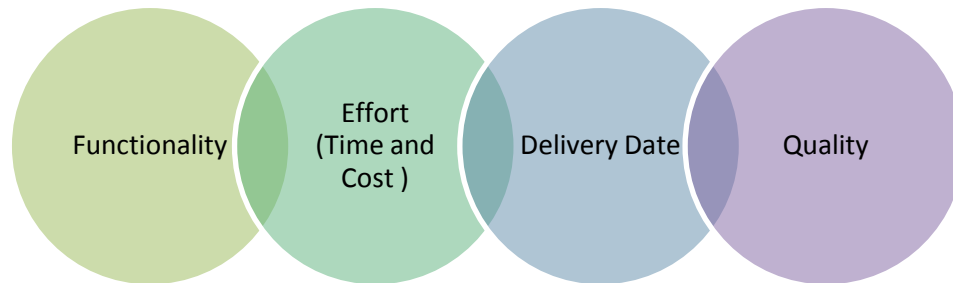
## Managing Expectations

<b>Estimated Time</b>	5 minutes
<b>Topic Objective</b>	To understand the four categories of expectations and how to manage them.
<b>Topic Summary</b>	Expectations fall into four main categories: <ul style="list-style-type: none"><li>• Functionality</li><li>• Effort (time and cost)</li><li>• Delivery date</li><li>• Quality</li></ul>
<b>Materials Required</b>	<ul style="list-style-type: none"><li>• Worksheet Two Case Study</li></ul>
<b>Planning Checklist</b>	Print out one copy of the Worksheet: Case
<b>Recommended Activity</b>	Divide participants into groups of four to six. Ask each group to identify possible expectations from stakeholders and project team members.
<b>Delivery Tips</b>	Teams can be divided into stakeholders and team members if you desire.
<b>Review Questions</b>	What are the four categories of expectations?



Each stakeholder and each project team member will have different expectations. As the project manager, you need to manage all of them. Unmanaged expectations will cause conflict and can cause the project to fail.

Expectations fall into four main categories:



Expectations for each area should be addressed in the Statement of Work, Project Planning Worksheet, and Project Charter.

Periodically reviewing these documents is important. Key checkpoints should include:

- Does everyone involved have the same understanding of the project?
- Clarify responsibilities as assigned
- Clarify the outcomes and time frame
- Clarify the requirements and budgets
- Understand the budget and schedule linkages
- Communicate to everyone who is relevant

## Creating a Task List

<b>Estimated Time</b>	5 minutes
<b>Topic Objective</b>	To understand how to identify the work to be done in a project.
<b>Topic Summary</b>	To begin the nuts-and-bolts planning process, you must first make a list of all the tasks that are going to be done.
<b>Materials Required</b>	<ul style="list-style-type: none"><li>• Flip chart paper</li><li>• Markers</li><li>• Worksheet: Case Study</li></ul>
<b>Planning Checklist</b>	Print out one copy of the Worksheet Two Case Study for each participant.
<b>Recommended Activity</b>	Work with the group to identify a list of tasks for the case study. Tasks can be kept at a high level.
<b>Delivery Tips</b>	<p>This activity can also be performed in small groups.</p> <p>After the activity is over, write out a final list of tasks on flip chart paper.</p>

To begin the nuts-and-bolts planning process, you must first make a list of all the tasks that are going to be done. Let's say you are going to paint a room. Tasks might include:



- Get paint samples
- Choose a paint color
- Remove all furniture
- Take off trim
- Paint trim
- Apply first coat
- Apply second coat
- Put trim back in
- Put all furniture back in

How detailed the task list becomes is up to you. We suggest writing the task list in the way that you will accomplish it. For example, if you are going to apply the first coat of paint yourself; you may want to include all steps, such as crack-filling, sanding, taping, etc. If, however, you are contracting the task out, "Apply first coat" may be the only item you need to monitor. (Your painter probably wouldn't appreciate being micro-managed!)

## Estimating Time

<b>Estimated Time</b>	10 minutes
<b>Topic Objective</b>	To understand how to calculate estimated times for tasks.
<b>Topic Summary</b>	This formula is considered the standard for estimating time ( $T_e$ ): $\frac{T_o+4T_m+T_p}{6}$
<b>Materials Required</b>	<ul style="list-style-type: none"><li>• Worksheet Two Case Study</li></ul>
<b>Planning Checklist</b>	Print out one copy of the Worksheet: Case Study
<b>Recommended Activity</b>	Pair participants off. Have them copy the task list created in the previous topic to the worksheet. Then, have them estimate time for each task.
<b>Stories to Share</b>	There is also a basic three-point formula that takes the three numbers and averages them. Most project managers find the weighted formula (used here) to be more accurate.
<b>Delivery Tips</b>	Prepare your own worksheet while participants are doing the activity.
<b>Review Questions</b>	What does $T_m$ represent?



When building your schedule, never guess times. Gather the most reliable information possible and use a scientific formula to get the best estimate. The better your estimates, the more reliable your plan will be.

This formula is considered the standard for estimating time ( $T_e$ ):

$$\frac{T_o + 4T_m + T_p}{6}$$

- $T_m$  = Probable Time
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- $T_e$  = Calculated Time (Best Estimate)

First, make a table, list your tasks, and fill in the estimated time for each. (We have numbered our tasks in the example on the next page for easy identification.) Time can be listed in minutes, hours, days, weeks, months, or years. You should keep the same time scale for each task.

Next, identify what the best and worst case estimates would be. Now, for each task, plug the numbers into the formula given above. The result is the estimated time.

Task	Probable Time	Optimistic Time	Pessimistic Time	Calculated Time
1. Get paint samples				
2. Choose a paint color				
3. Remove all furniture				
4. Take off trim				
5. Paint trim				
6. Apply first coat				
7. Apply second coat				
8. Put trim back in				
9. Put all furniture back in				

## Estimating Resources

<b>Estimated Time</b>	5 minutes
<b>Topic Objective</b>	To understand what the term “resources” means in project management.
<b>Topic Summary</b>	In project management, “resources” means people, materials, and money. For now, let’s just focus on people and materials.
<b>Materials Required</b>	<ul style="list-style-type: none"><li>• Worksheet: Case Study</li></ul>
<b>Planning Checklist</b>	Print out one copy of the Worksheet: Case Study
<b>Recommended Activity</b>	Divide participants into groups of four to six. Ask participants to list people and things that will be required to complete this project.
<b>Review Questions</b>	What are the three types of resources?



Now that the task list is complete, it's time to decide what resources will be used to accomplish the tasks. In project management, "resources" means people, materials, and money. For now, let's just focus on people and materials – we'll look at money in a moment.

A common method of resource listing is to list the tasks, estimated time, and resources required, all in the same table. We have started an example here.

Task	Calculated Time	People Required	Materials Required
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8. Put trim back in	½ hour		
9. Put all furniture back in	1 hour		

How detailed you get with your resource list is up to you. For people resources, make sure you include all people who are going to be spending their time on the project, even yourself.



## Estimating Costs

<b>Estimated Time</b>	5 minutes
<b>Topic Objective</b>	To understand what project costs can encompass.
<b>Topic Summary</b>	Cost information should include the price for materials, as well as salaries and fees for people working on your project.
<b>Materials Required</b>	<ul style="list-style-type: none"><li>• Flip chart paper</li><li>• Markers</li><li>• Worksheet: Case Study</li></ul>
<b>Planning Checklist</b>	Print out one copy of the Worksheet: Case Study for each participant.
<b>Recommended Activity</b>	In a large group, brainstorm some costs that would need to be considered for this project.
<b>Stories to Share</b>	This is intended to be a high-level overview of costs. Building a full project budget can be a difficult task, and is out of the scope of this course.
<b>Delivery Tips</b>	This activity can also be performed in small groups.



Our next step is to add cost information to our table. Make sure to include salary information for everyone, even project team members, and to include line item cost information for each material resource. If you are doing a home project (as we are here), salary information will not be necessary.

Task	Calculated Time	People Required	Estimated Cost for People	Materials Required	Estimated Cost for Resources
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## **Activities**

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

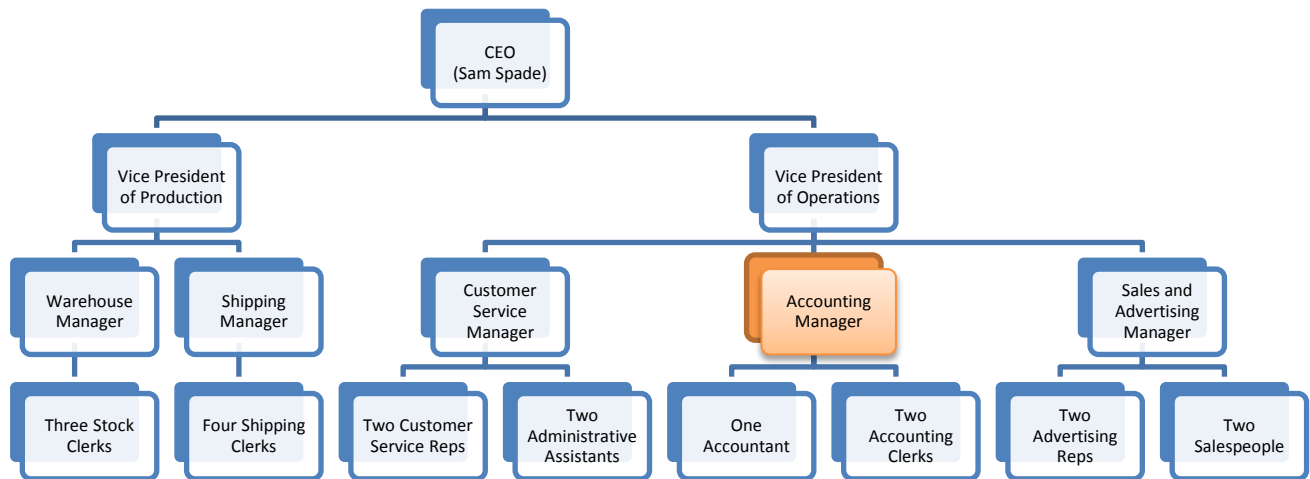
Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.

## Sample Worksheet: Case Study

### Background

Super Shovels Inc. needs a new space for their entire company, which includes administrative staff, the sales and marketing team, and production facilities. They are a small, privately owned company that manufactures light construction equipment. They have been in business for about 15 years, and most of the staff has been with the company since the beginning.

The company structure looks like this:



The CEO, Sam Spade, has appointed you (the Accounting Manager) as the project manager for this venture. Your project team will include:

- Warehouse Manager
- Shipping Manager
- Accountant
- One administrative assistant
- External consultant

## **Quick Reference Sheets**

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

# Project Management

## What is a Project?

All successful projects share the following characteristics:



- Clear goals
- Defined ownership/responsibility
- Timeline
- Dedicated team
- Defined methodology
- Controlled execution
- Completion evaluated based on original plan
- Linked to business objectives
- Supported by an organization's management team

## Estimating Time

When building your schedule, never guess times. Gather the most reliable information possible and use a scientific formula to get the best estimate. The better your estimates, the more reliable your plan will be.



This formula is considered the standard for estimating time ( $T_e$ ):

$$\frac{T_o + 4T_m + T_p}{6}$$

- $T_m$  = Probable Time
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- $T_e$  = Calculated Time (Best Estimate)

## Identifying Your Stakeholders



A stakeholder is someone who has an interest in the development and/or outcome in the project. This person is usually only involved at key project gateways, such as project initiation and evaluation. Their main role is to provide feedback and guidance.

When you are identifying stakeholders, think outside the box. Ask other members of the team and the organization, "Who else should we involve in this? Who might be affected?"

If it turns out you missed a stakeholder, ask them for their feedback. You may not be able to change the project's course at that point, but you may receive valuable information on possible opportunities or potential issues.

## **Certificate of Completion**

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

CERTIFICATE OF COMPLETION

**[Name]**

*Has mastered the course*

*Project Management*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_



## **PowerPoint Sample**

Below you will find the PowerPoint sample. The slides are based on and created from the Training Manual. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

## Sample Module: Planning

Now it's time to plan the nuts and bolts of your project.

When building your plan, remember:  
Everything in the plan is a prediction.  
The only fact that you know for certain is that your plan is definitely not 100% right.  
Contingency needs to be built in to cope with the uncertainty.

*Those who fail to plan, plan to fail.*

*Anonymous*



## Managing Expectations



## Creating a Task List

Details

Write in the  
order of tasks

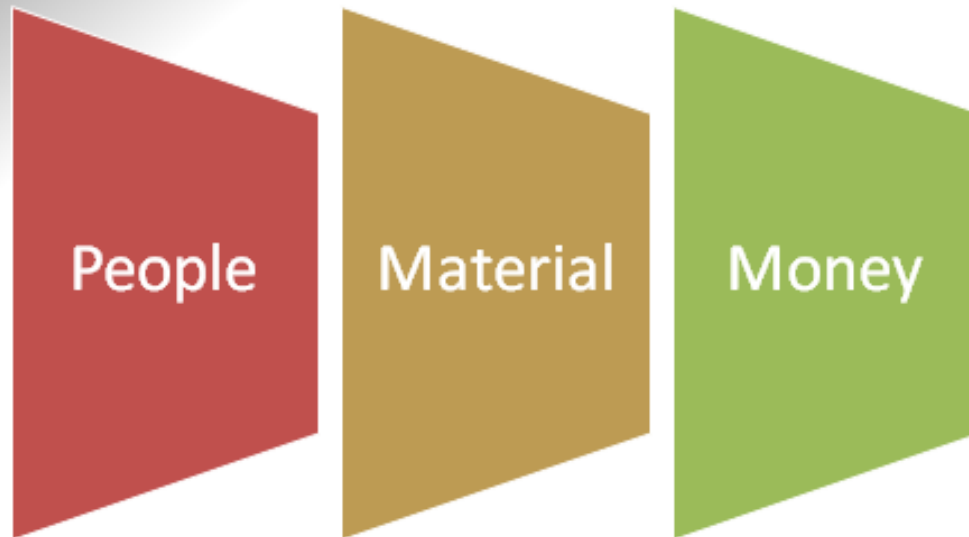
Be aware of  
micro-  
managing

## Estimating Time

$$T_e = \frac{T_o + T_m + T_p}{6}$$

- $T_m$  { • Probable Time
- $T_o$  { • Optimistic Time
- $T_p$  { • Pessimistic Time
- $T_e$  { • Calculated Time (Best Estimate)

## Estimating Resources



## Estimating Costs



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