

# THE IN-HOUSE TRAINING COMPANY

## Project management 'masterclasses'

### Overview

Masterclasses? Refreshers? Introductions?

It depends what you're looking for and where you want to pitch them, but here are six tried-and-tested highly focused sessions that organisations can take individually or as a series, to help develop their teams' project management capabilities one topic at a time.

There are six sessions in all:

- Stakeholder management
- Requirements and prioritisation
- Estimating
- Scheduling
- Risk and issue management
- Budgeting and cost control

### Learning objectives

Objectives for each individual session are set out below, as part of the session outlines.

Taken together, as a series, however, these modules are an ideal opportunity to develop your team's levels of project management capability maturity, whether that's by introducing them to the basic principles, refreshing them on best practice, or giving them the opportunity to really drill down into a specific area of challenge in your particular operating environment.

### Who should attend?

The sessions can be pitched at any level, according to your priorities and your team's experience.

### Format

Flexible.

A 60-minute session (delivered virtually, via Zoom or Teams) is an effective introduction.

A 90-minute session allows for more in-depth treatment.

A half-day session (face-to-face or virtual) gives time for a more challenging workshop, using exercises and scenarios.

### **Special features**

The session content is aligned to APM and PMI principles but can be tailored to your organisation's own models and processes to help ensure that participants are continually relating the learning to their own projects.

### **Expert trainer**

**Steve** is a highly experienced and qualified consultant, project management practitioner and trainer. He has more than two decades' experience of project management practice and more than a decade of training provision. His experience includes the delivery of multi-million pound projects and programmes, sometimes involving more than one country. He first used Agile in the 1990s.

He is a member of the Association for Project Management (APM) in the UK and of the Project Management Institute (PMI) in the USA. He holds qualifications from both the APM and the PMI as well as being a qualified practitioner and accredited trainer for PRINCE2, Agile Project Management, Change Management and Better Business Cases. Steve also delivers the APM programmes: the Project Fundamentals Qualification (PFQ) and the Project Management Qualification (PMQ). He also holds qualifications in Benefits Management and the agile method Scrum.

A very popular and effective trainer, Steve has delivered project management training to a wide range of audiences, technical and non-technical, including 10 Downing Street, as well as public, private and VCSE sector organisations across the country.

### **Feedback**

These sessions get great feedback, as the comments from participants show:

- This session was incredibly useful.
- Good content, useful tools, snapshots of use.
- Good practical tools.
- Steve's humour and approachable manner made the hour very enjoyable and I learnt many things!
- Trainer was very clear in giving examples.
- In an hour it's tricky to get depth, but the level seems good tbh – it's engaging and gives you a flavour.
- A very insightful course.
- Very useful!
- Comprehensive explanation of key principles and put forward clearly – good as a recap and very reassuring as a benchmarking of own experience/approach.
- Engaging, had time for questions, and answered all questions asked by the group

- Steve is a great trainer!
- Skills for budgeting that will save you a lot of time if you use them early on in the project!
- A good introduction or recap of risk and issue management processes.
- It's a very useful session that gives you an in-depth view of how to manage risks and issues and how to communicate them to client and stakeholders.
- It has been great in developing tools and strategies that I can pull into my practice.
- Informative, friendly, good humour made for an enjoyable and understandable session!
- Spot on!
- A clear introduction to the basic procedures for assessing relative risk. Was interesting to compare the 'standard mode' against the reality of externally funded research projects.
- Steve is, once again, spot on.

## Session outlines

### 1 Stakeholder management

#### Session objectives

This session will help participants:

- Understand why stakeholders matter to projects
- Be able to identify and engage stakeholders
- Be able to categorise stakeholders by their significance

#### 1 Key principles

- What does 'stakeholder' mean – in theory?
- What does this mean in practice?
- Why stakeholders matter
- Consequences of missing stakeholders
- The stakeholder management process:
  - Identify
  - Assess
  - Plan
  - Engage

#### 2 Identifying stakeholders

- Rapid listing
- CPIG analysis
- PESTLE analysis

- Drawing on the knowledge and experience of others
- Other ways to identify stakeholders

### 3 Assessing stakeholders

- Which stakeholders are significant?
- Stakeholder radar
- Power-interest maps
- Power-attitude maps

### 4 Planning

- The adoption curve
- Dealing with obstacles
- Who should engage which stakeholder?
- How should the project's organisation be structured?
- How will communication happen?

### 5 Engaging

- Seven principles of stakeholder engagement

## 2 Requirements and prioritisation

### Session objectives

This session will help participants:

- Understand how clarity of requirements contributes to project success
- Use different techniques for prioritising requirements
- Agree requirements with stakeholders
- Manage changes to requirements

### 1 Understanding and managing stakeholder needs and expectations

- What are 'requirements'?
- What is 'requirements management'?
- Sources of requirements – and the role of stakeholders
- Are stakeholders sufficiently expert to specify their needs?
- Do they understand the detail of what they want, or do they need help to tease that out?
- What do stakeholders want to achieve?
- Working within constraints
- Prioritising requirements – three techniques

## 2 MoSCoW prioritisation

- 'Must have', 'should have', 'could have', 'won't have this time'
- When to use MoSCoW

## 3 The Kano Model

- Customer satisfaction – 'attractive' and 'must-be' qualities
- When to use Kano

## 4 Value-based prioritisation

- Understanding risk v value
- Using risk v value to prioritise features and schedules

## 5 Agreeing requirements

- Perfect v 'good enough'
- Establishing acceptance criteria
- Requirements traceability
- Agreeing project scope

## 6 Changing requirements

- Why requirements change
- Why change control matters
- Impact on projects
- A formal change control process
- Paying for change – managing change for different types of project

# 3 Estimating

### Session objectives

This session will help participants:

- Understand the different purposes estimates satisfy
- Be able to use different estimating techniques
- Understand how to achieve different levels of accuracy

### 1 Key principles

- What's an estimate? Informed guesswork
- What needs to be estimated? Costs, resources, effort, duration
- Tolerances
- Precision v accuracy

## 2 Estimating through the lifecycle

- Start
- Plan
- Do

## 3 Early estimates

- Comparative ('analogous') estimating
- Parametric estimating
- Using multiple estimating techniques

## 4 Bottom-up estimating

- Bottom-up ('analytical') estimating
- Pros
- Cons

## 5 Three-point estimating

- Three-point ('PERT': Programme Evaluation and Review Technique) estimating
- Uncertainty and the range of estimates
- Calculating a weighted average
- Three-point with bottom-up

## 4 Scheduling

### Session objectives

This session will help participants:

- Understand how to create a viable schedule
- Be able to use different forms of schedule
- Understand the concept of the critical path

### 1 Key principles

- The planning horizon
- Rolling wave planning
- Release planning

### 2 Viable scheduling

- Creating a viable schedule
- Define the scope
- Sequence the work

- Identify the risks and build in mitigations
- Identify the resources
- Estimate the effort and durations
- Check resource availability
- Refine until a workable schedule is produced

### 3 Critical path analysis

- The critical path
- Network diagrams
- Sequence logic
- Practical application:
  - Network diagram with estimated durations
  - The 'forward pass'
  - The 'backward pass'
  - Calculating total float
  - Identifying the critical path
  - Calculating free float
- Gantt charts

## 5 Risk and issue management

### Session objectives

This session will help participants:

- Understand the difference between risks and issues
- Be able to identify and assess risks
- Understand ways of mitigating risks
- Manage issues

### 1 Key principles

- Understanding risk
- Threats and opportunities
- The risk management process
  - Preparation – proactive risk management
  - The process – identify, assess, plan, implement
  - Stakeholder communication
- Roles and responsibilities
- Risk management strategy

- The risk register
- Risk appetite

## **2 Risk identification**

- Brainstorming
- Interviews
- Assumption analysis
- Checklists

## **3 Risk assessment and prioritisation**

- Probability, impact and proximity
- Triggers
- Qualitative risk assessment
- Qualitative impact assessment
- Qualitative probability assessment
- Probability / impact grid
- Bubble charts
- Risk tolerance

## **4 Planning countermeasures**

- To mitigate or not to mitigate?
- Categories of risk response
- Avoid and exploit
- Reduce and enhance
- Transfer
- Share
- Accept
- Contingency
- Secondary risks

## **5 Issue management**

- What is an issue?
- Tolerances
- Issues and tolerances
- The PRINCE2 view of issues
- Ownership of issues
- An issue management process
- Issue register



## 6 Budgeting and cost control

### Session objectives

This session will help participants:

- Understand what to include in a budget – and why
- Choose – and use – the appropriate estimating technique
- Align the budget with the schedule
- Understand how to monitor spend and control costs
- Trouble-shoot effectively to get projects back within budget

### Session format

Flexible. The session can be tailored to the participants' average level of project management maturity – a 60-minute session (delivered virtually) is an effective introduction. A 90-minute session allows for more in-depth treatment. A half-day session (face-to-face or virtual) gives time for a more challenging workshop, particularly to discuss specific cost control issues with any of the participants' current projects.

#### 1 Where is the money coming from?

- Can we pay from revenue? Do we need to borrow? How long will the project take to pay back?
- The lifecycle of the budget
- Through-life costs
- Stakeholder involvement

#### 2 Estimating costs

- Reminder: the relationship between estimates
- Reminder: possible estimating techniques
- What do we need to estimate?
  - People
  - Equipment
  - Materials
  - Facilities and operating costs
  - Work package estimate
  - Estimated project costs
- Estimating agile projects

#### 3 Aligning budget and schedule

- Scheduling and financial periods
- Spreading the budget

#### 4 Reserves and agreeing the budget

- Contingency reserve
- Management reserve
- Agreeing the budget

#### 5 Cost control

- Planned spend over time
- Actual spend over time
- Work completed over time
- Evaluating different scenarios: delivery v spend

#### 6 Trouble-shooting

- Why are we where we are?
- What has caused the project to spend at the rate it is?
- Why is it delivering at the rate it is?
- What are the root causes?
- What can we do about it?

### Any questions?

Please just give us a call on **01582 463463** – we're here to help!  
Or visit [www.theinhousetrainingcompany.com](http://www.theinhousetrainingcompany.com)