Helpful Project Management Tools for the Modern Manager

Technology Management Council

Carl Angotti, Angotti Product Development
Larry Reeves, TMC secretary

April 3, 2008 SCV/SF Chapter Meeting

IEEE

Three Project Management Templates

- Status report template
- Action items spreadsheet template
- RSS buffer calculation template

General Project Management

- What you say you will do?
- When you say you will accomplish this?
- Did you do what you said, when you said you would?

The What and When

- Front End Planning
- Task List with dates
- Gannt Chart
- Excel Spreadsheet with dates

What's Happening?

- Status Reports – Non-Real Time Information from and to others
- Status Meetings – Real Time Information from and to others

Status Report Template

- Were developed from start of my career
- What should they contain?

Action Items Template

- Used for Status Meetings
- Were developed over time with use and observation

Action Items Template

- Focus of Status Meeting Agenda
- Completed quickly at end of meeting
- Show Priorities, What, Who and When

Project Buffer Template

- Scheduling and Schedule Slips
- Why Project Buffers
- How they work?

Managing Quality Issues

- **Failure Analysis**

  Document

  Basic data collection

- **Root cause & corrective action**

  8 Discipline approach

  Document

- **Useful resource site**

  DOE, FMEA, Lean/Six Sigma, SPC

  Free resources & sell training

  Document

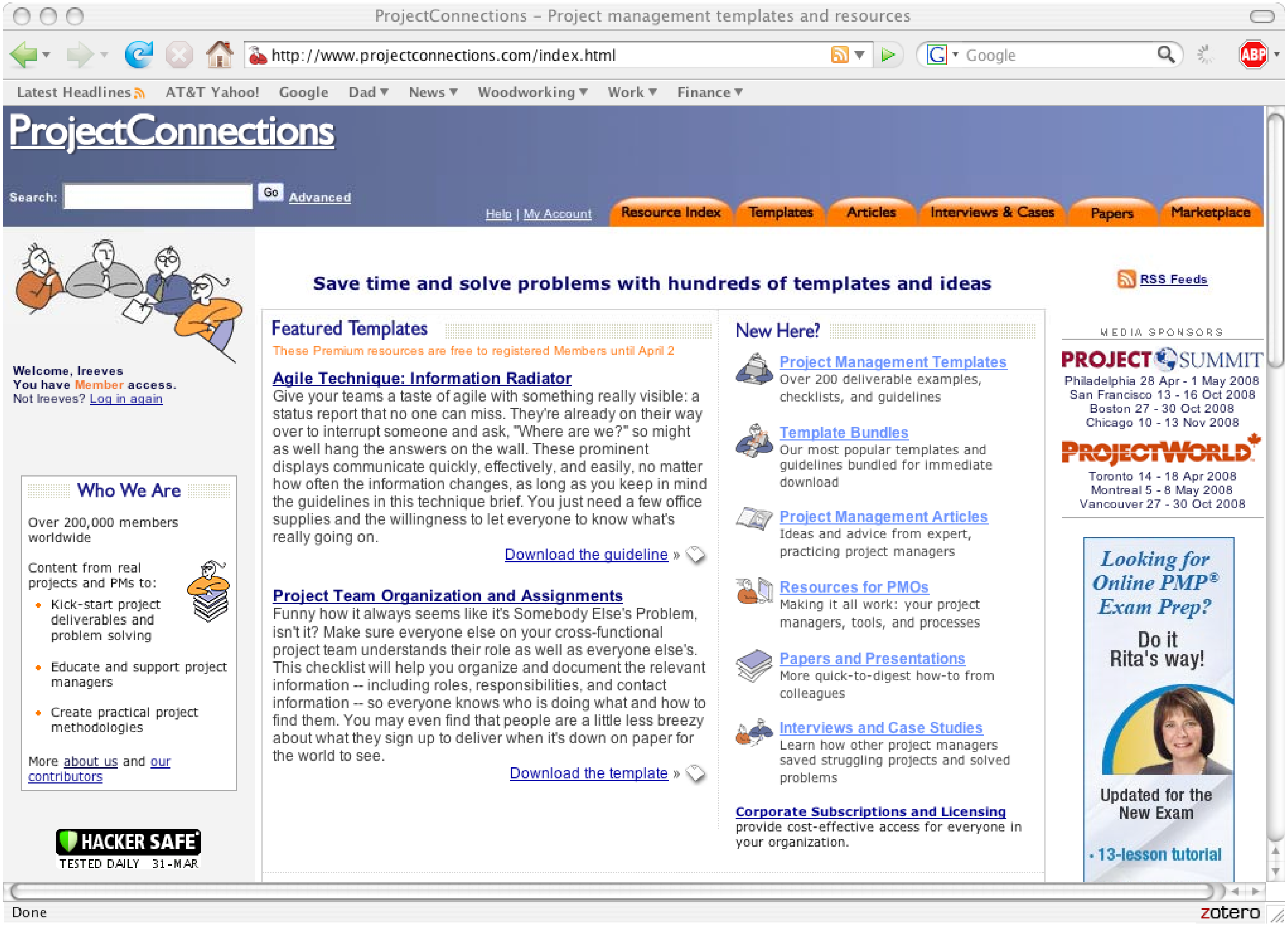
  www.qualitytrainingportal.com

Resources for Managing Projects

- ProjectConnections.com
  - Extensive collection of project management
    - Templates
    - White papers
    - Case studies
    - Articles & newsletter
  - Subscription site
    - Basic membership is free
      - Bi-weekly newsletter
      - ~20% of templates
    - Premium membership $15/mo
      - 15 day free trial

IEEE

Projectconnections.com


ProjectConnections – Project management templates and resources

http://www.projectconnections.com/index.html

Latest Headlines | AT&T Yahoo! | Google | Dad | News | Woodworking | Work | Finance

ProjectConnections

Search: Go Advanced

Help | My Account

Resource Index | Templates | Articles | Interviews & Cases | Papers | Marketplace

Welcome, lreeves
You have Member access.
Not lreeves? Log in again

Who We Are

Over 200,000 members worldwide

Content from real projects and PMs to:

- Kick-start project deliverables and problem solving
- Educate and support project managers
- Create practical project methodologies

More about us and our contributors

HACKER SAFE
TESTED DAILY 31-MAR

Save time and solve problems with hundreds of templates and ideas

Featured Templates

These Premium resources are free to registered Members until April 2

Agile Technique: Information Radiator

Give your teams a taste of agile with something really visible: a status report that no one can miss. They're already on their way over to interrupt someone and ask, "Where are we?" so might as well hang the answers on the wall. These prominent displays communicate quickly, effectively, and easily, no matter how often the information changes, as long as you keep in mind the guidelines in this technique brief. You just need a few office supplies and the willingness to let everyone to know what's really going on.

Download the guideline »

Project Team Organization and Assignments

Funny how it always seems like it's Somebody Else's Problem, isn't it? Make sure everyone else on your cross-functional project team understands their role as well as everyone else's. This checklist will help you organize and document the relevant information -- including roles, responsibilities, and contact information -- so everyone knows who is doing what and how to find them. You may even find that people are a little less breezy about what they sign up to deliver when it's down on paper for the world to see.

Download the template »

New Here?

Project Management Templates
Over 200 deliverable examples, checklists, and guidelines

Template Bundles
Our most popular templates and guidelines bundled for immediate download

Project Management Articles
Ideas and advice from expert, practicing project managers

Resources for PMOs
Making it all work: your project managers, tools, and processes

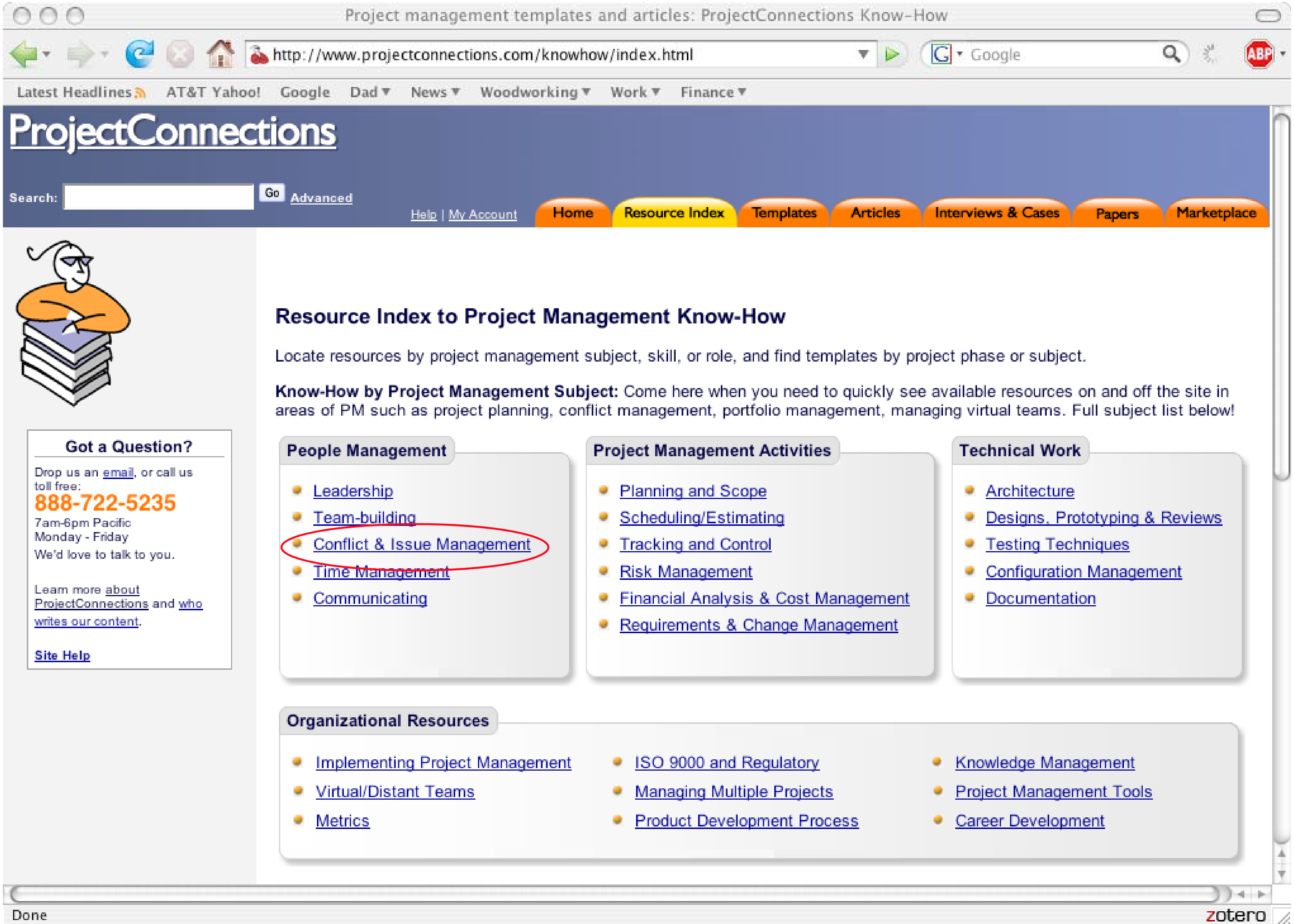
Papers and Presentations
More quick-to-digest how-to from colleagues

Interviews and Case Studies
Learn how other project managers saved struggling projects and solved problems

Corporate Subscriptions and Licensing
provide cost-effective access for everyone in your organization.

RSS Feeds

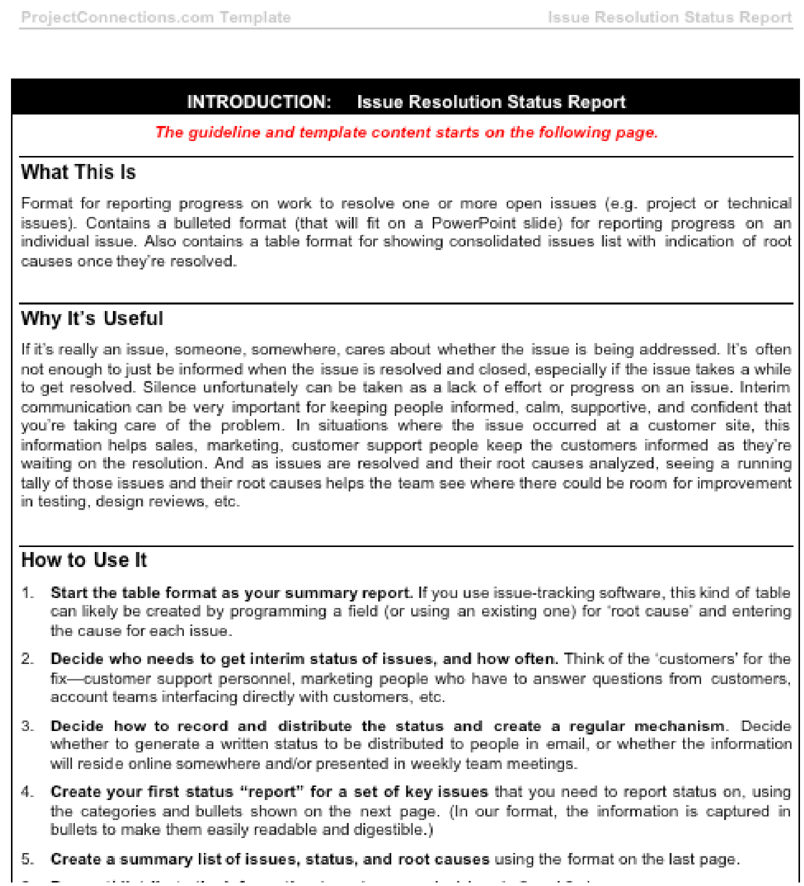
Done
zotero


Project management templates and articles: ProjectConnections Know-How
http://www.projectconnections.com/knowhow/index.html
Google
Latest Headlines
AT&T Yahoo!
Google
Dad
News
Woodworking
Work
Finance
ProjectConnections
Search:
Go
Advanced
Help | My Account
Home
Resource Index
Templates
Articles
Interviews & Cases
Papers
Marketplace
Got a Question?
Drop us an email, or call us toll free:
888-722-5235
7am-6pm Pacific
Monday - Friday
We'd love to talk to you.
Learn more about ProjectConnections and who writes our content.
Site Help
Resource Index to Project Management Know-How
Locate resources by project management subject, skill, or role, and find templates by project phase or subject.
Know-How by Project Management Subject: Come here when you need to quickly see available resources on and off the site in areas of PM such as project planning, conflict management, portfolio management, managing virtual teams. Full subject list below!
People Management
Leadership
Team-building
Conflict & Issue Management
Time Management
Communicating
Project Management Activities
Planning and Scope
Scheduling/Estimating
Tracking and Control
Risk Management
Financial Analysis & Cost Management
Requirements & Change Management
Technical Work
Architecture
Designs, Prototyping & Reviews
Testing Techniques
Configuration Management
Documentation
Organizational Resources
Implementing Project Management
Virtual/Distant Teams
Metrics
ISO 9000 and Regulatory
Managing Multiple Projects
Product Development Process
Knowledge Management
Project Management Tools
Career Development
Done
zotero

IEEE

ProjectConnections.com

- **Introduction page for each template**
  - **What it is**
  - **Why its useful**
  - **How-to use it**



INTRODUCTION: Issue Resolution Status Report

The guideline and template content starts on the following page.

What This Is

Format for reporting progress on work to resolve one or more open issues (e.g. project or technical issues). Contains a bulleted format (that will fit on a PowerPoint slide) for reporting progress on an individual issue. Also contains a table format for showing consolidated issues list with indication of root causes once they're resolved.

Why It's Useful

If it's really an issue, someone, somewhere, cares about whether the issue is being addressed. It's often not enough to just be informed when the issue is resolved and closed, especially if the issue takes a while to get resolved. Silence unfortunately can be taken as a lack of effort or progress on an issue. Interim communication can be very important for keeping people informed, calm, supportive, and confident that you're taking care of the problem. In situations where the issue occurred at a customer site, this information helps sales, marketing, customer support people keep the customers informed as they're waiting on the resolution. And as issues are resolved and their root causes analyzed, seeing a running tally of those issues and their root causes helps the team see where there could be room for improvement in testing, design reviews, etc.

How to Use It

1. **Start the table format as your summary report.** If you use issue-tracking software, this kind of table can likely be created by programming a field (or using an existing one) for 'root cause' and entering the cause for each issue.
2. **Decide who needs to get interim status of issues, and how often.** Think of the 'customers' for the fix—customer support personnel, marketing people who have to answer questions from customers, account teams interfacing directly with customers, etc.
3. **Decide how to record and distribute the status and create a regular mechanism.** Decide whether to generate a written status to be distributed to people in email, or whether the information will reside online somewhere and/or presented in weekly team meetings.
4. **Create your first status "report" for a set of key issues** that you need to report status on, using the categories and bullets shown on the next page. (In our format, the information is captured in bullets to make them easily readable and digestible.)
5. **Create a summary list of issues, status, and root causes** using the format on the last page.

ProjectConnections.com

Issue Status: [issue #, title]

- **[Product name]**
  - **Problem**
    - [Describe problem here: Symptoms, customer or situation in which it occurred, etc.]
  - **Strategy**
    - [explain what the team is doing to diagnose the problem and determine a solution]
  - **Schedule**

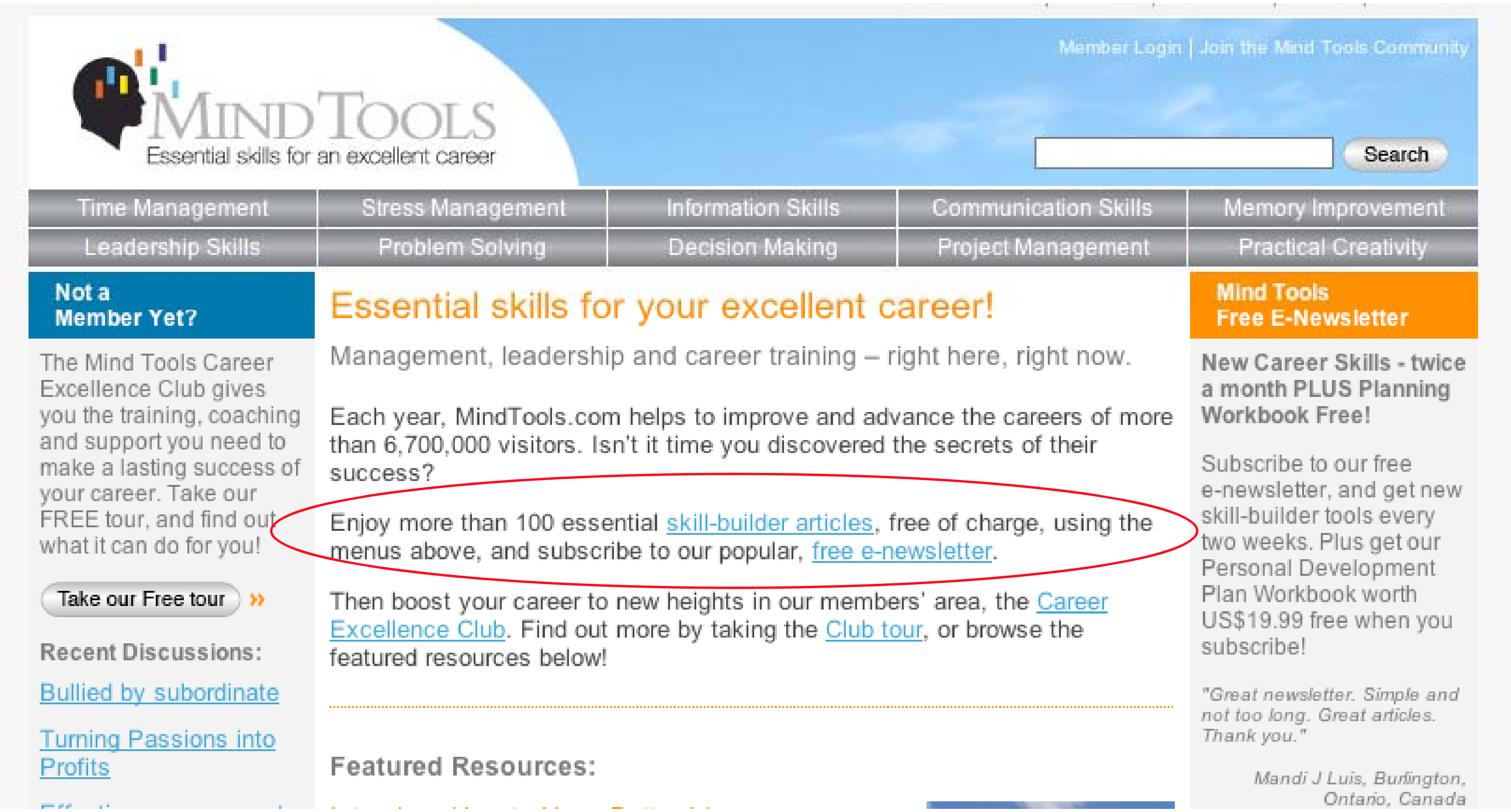
Task 1 (e.g., design a fix)	08/12/04
Task 2 (e.g., prototype the fix)	09/16/04
Task 3 (e.g., unit test and integrate the prototype)	10/12/04
Task 4 (e.g., review results of testing)	10/22/04
Task 5 (e.g., approve final fix)	11/15/04
Task 6 (e.g., make available to Customer X – critical need)	11/20/04
Task 7 (e.g., test at 5 customers)	11/29/04
Task 8 (e.g., review and release final change)	01/15/05

- Owner

- **Issue Resolution**
  - **Reporting on progress and status**
  - **"One pager" per issue**
    - **PowerPoint slide**
    - **Text report**
  - **Summary status for all issues**

Document

Mind Tools



www.mindtools.com **Career skills subscription website**

Paired Comparison Template

Figure 2: Example Paired Comparison Analysis Table (filled in):

	Overseas Market (A)	Home Market (B)	Customer Service (C)	Quality (D)
Overseas Market (A)		A,2	C,1	A,1
Home Market (B)			C,1	B,1
Customer Service (C)				C,2
Quality (D)				

Finally she adds up the A, B, C and D values, and converts each into a percentage of the total. This gives these totals:

- A = 3 (37.5%)
- B = 1 (12.5%)
- C = 4 (50%)
- D = 0.

- **Use to rank alternatives**
- **Example:**
  - **Which to invest in:**
    - **Overseas markets**
    - **Home market**
    - **Customer Service**
    - **Quality**
  - **Assign ID to each option**
  - **Compare Pairs**
  - **Numerical importance**
    - **0 = no difference**
    - **3 = major difference**
  - **Sum score for each**

Gantthead.com for IT projects

- IT projects oriented
- Free basic subscription
  - Blogs, articles, Wiki
- Premium subscription - $149/year
  - Templates, project plans, presentations

Resources for the Modern Manager

- **Angotti Product Development**
  www.angotti.com
- **Paper describing the Action Items List**
  http://www.angotti.com/docs/Team%20Action%20Item%20List.pdf
- **RSS Project Cost & Budget Calculator**
  http://angotti.com/techresources_paper.html
- **Presentation will be posted on IEEE TMC Website**
  http://www.ieee-scv-ems.org
  click on Monthly Meetings.

Contact: Carl Angotti
carl@angotti.com

- **Project Connections - PM tools**
  www.projectconnections.com
- **Mind Tools - career development**
  www.mindtools.com
- **Quality training**
  www.qualitytrainingportal.com
- **IT Project Management**
  www.gantthead.com
- **Effective Management Training seminars**
  www.ieee-scv-ems.org/seminars/seminars.htm

Contact: Larry Reeves
lreeves@ieee.org

IEEE

Failure Analysis Report

Case No:	**RMA no:**	**Date:**
Customer:		
System Model:	**System S/N:**	
Failed Part Information		
Part Description:	**P/N:**	**S/N:**

Customer Complaint/Comment

Initial Evaluation

Analysis

Corrective Action

Conclusion

Report Prepared By:
Title:

CORRECTIVE/PREVENTATIVE ACTION REPORT

Initiator:	Issue Location:	Part, Procedure or Process:	Description:
CA/PA #:	Start Date:	Purge/Ship Hold *(if req'd)*:	

1. Team	**Internal Members**	**External Members**

2. Problem Description	**Date:**

3. Root Cause Analysis	**Date:**

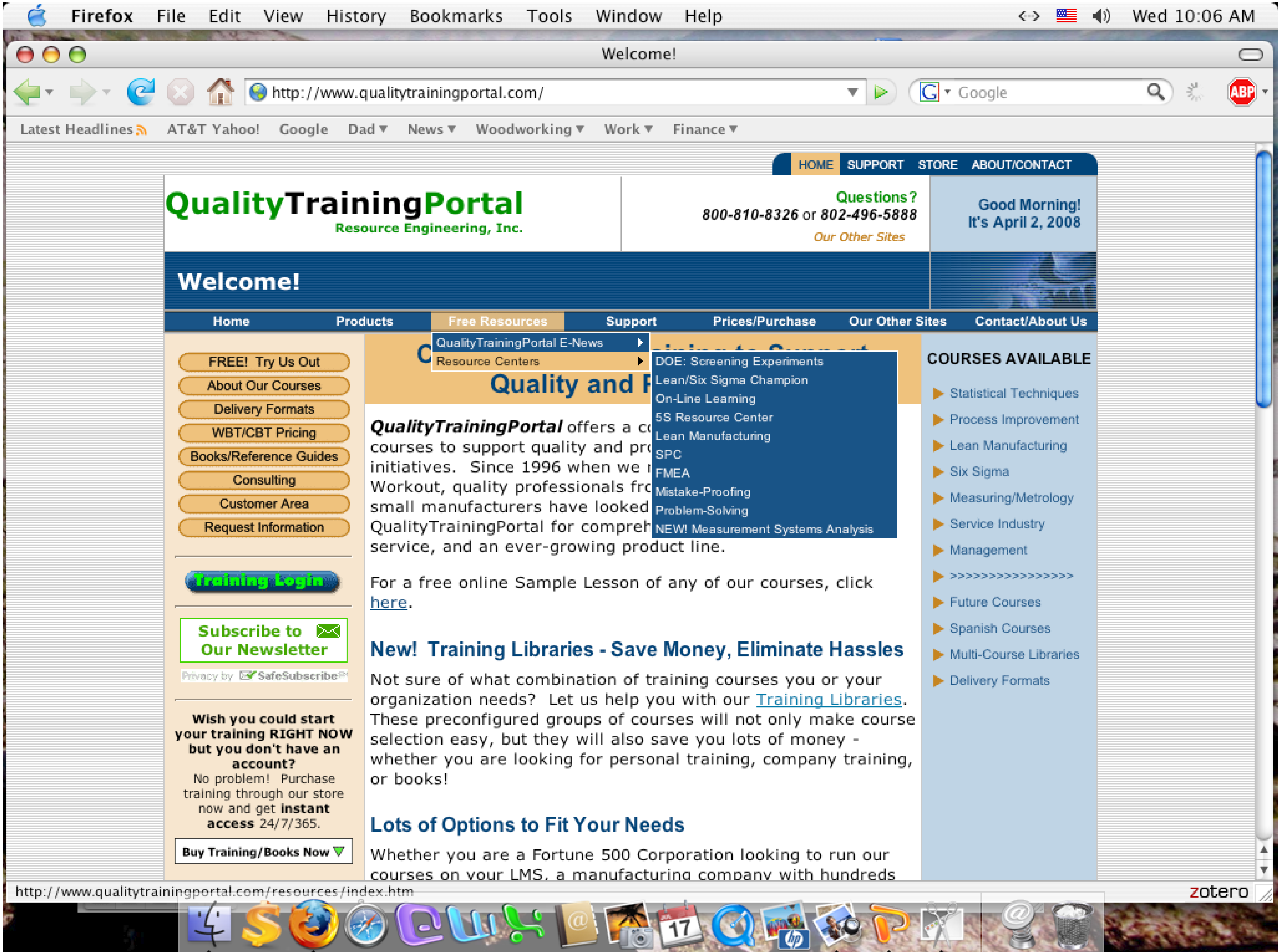
4. Containment Plan	**Date:**

5. Corrective Action Plan	**Date:**

6. Preventative Action Plan	**Date:**

7. Effectiveness Verification Plan	**Date:**

8. Closure	**Date:**


Firefox File Edit View History Bookmarks Tools Window Help
Wed 10:06 AM
Welcome!
http://www.qualitytrainingportal.com/
Google
Latest Headlines AT&T Yahoo! Google Dad News Woodworking Work Finance
HOME SUPPORT STORE ABOUT/CONTACT
QualityTrainingPortal
Resource Engineering, Inc.
Questions?
800-810-8326 or 802-496-5888
Our Other Sites
Good Morning!
It's April 2, 2008
Welcome!
Home Products Free Resources Support Prices/Purchase Our Other Sites Contact/About Us
QualityTrainingPortal E-News
Resource Centers
DOE: Screening Experiments
Lean/Six Sigma Champion
On-Line Learning
5S Resource Center
Lean Manufacturing
SPC
FMEA
Mistake-Proofing
Problem-Solving
NEW! Measurement Systems Analysis
FREE! Try Us Out
About Our Courses
Delivery Formats
WBT/CBT Pricing
Books/Reference Guides
Consulting
Customer Area
Request Information
Training Login
Subscribe to Our Newsletter
Privacy by SafeSubscribe
Wish you could start your training RIGHT NOW but you don't have an account?
No problem! Purchase training through our store now and get instant access 24/7/365.
Buy Training/Books Now
Quality and
QualityTrainingPortal offers a c
courses to support quality and pr
initiatives. Since 1996 when we
Workout, quality professionals fr
small manufacturers have looked
QualityTrainingPortal for compreh
service, and an ever-growing product line.
For a free online Sample Lesson of any of our courses, click here.
New! Training Libraries - Save Money, Eliminate Hassles
Not sure of what combination of training courses you or your organization needs? Let us help you with our Training Libraries. These preconfigured groups of courses will not only make course selection easy, but they will also save you lots of money - whether you are looking for personal training, company training, or books!
Lots of Options to Fit Your Needs
Whether you are a Fortune 500 Corporation looking to run our courses on your LMS, a manufacturing company with hundreds
COURSES AVAILABLE
Statistical Techniques
Process Improvement
Lean Manufacturing
Six Sigma
Measuring/Metrology
Service Industry
Management
>>>>>>>>>>>>>>>
Future Courses
Spanish Courses
Multi-Course Libraries
Delivery Formats
http://www.qualitytrainingportal.com/resources/index.htm
zotero

Paired Comparison Worksheet

- For information on paired comparisons, visit www.mindtools.com/rs/pairedcomparisonanalysis.
- For other decision-making tools, visit http://www.mindtools.com/rs/DecisionMaking.
- For business leadership skills visit http://www.mindtools.com/rpages/HowtoLead.htm.

Option	A:	B:	C:	D:	E:	F:	G:	H
A:								
B:								
C:								
D:								
E:								
F:								
G:								
H:								

Option	Total	Rank
A:		
B:		
C:		
D:		
E:		
F:		
G:		
H:		

To learn more skills like this every two weeks, subscribe to the free Mind Tools newsletter: http://www.mindtools.com/subscribe.htm.