

# Project Management

Kepner-Tregoe Project Management combines the technical and people skills that are fundamental for effective project management. Our practical, step-by-step approach results in the successful management of projects, regardless of size or complexity.

## THE KEPNER-TREGOE APPROACH

Today, projects are the way work gets done. Yet many projects fail to meet their objectives, despite being funded and managed by capable people. Project failure is often caused by a lack of fundamental project management skills among business professionals.

Kepner-Tregoe Project Management combines the technical and people skills that are fundamental for effective project management. Our practical, step-by-step approach results in the successful management of projects, regardless of size or complexity. Drawing on our proven processes for problem solving and decision making, risk management, and human performance, Kepner-Tregoe Project Management provides the capabilities needed to bring projects in on-time and on-budget.

Since 1958, Kepner-Tregoe (KT) has worked with major organizations throughout the world to help them achieve operational and strategic objectives. Recent enhancements to our Project Management program were thoroughly tested within client organizations and then integrated into the workshop, making it even more effective to understand and use.

Our comprehensive method for strengthening the project management expertise in organizations consists of four distinct phases:

- Preparation:** Carefully structuring the program by developing clear, visible objectives and securing top management commitment
- Installation:** Selecting and developing internal consultants and trainers; customizing the workshop based on client objectives; planning and delivering training
- Application:** Appropriately modifying the organization's procedures, as well as measuring results and providing consulting support
- Maintenance:** Providing our clients with ongoing service to ensure objectives and long-term results are achieved





# Kepner-Tregoe's Project Management Workshop

## KT PROJECT MANAGEMENT PROCESS

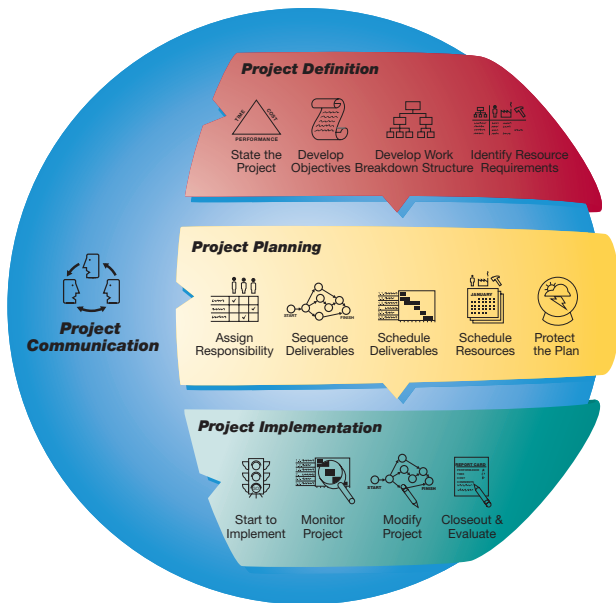
**Project Definition:** Clarify the project's purpose and objectives, with measures and standards, before beginning detailed project planning. The project's scope is developed using a work breakdown structure, then resource requirements are identified to determine the project's costs. Project Definition demonstrates the value the project creates, balanced with the cost and time required. It provides answers to questions about the "what," "why," "how," and "how much" of a project, and accomplishes this using these tools: project statement, project objectives, work breakdown structure, and resource requirements.

**Project Planning:** Assign project responsibilities, sequence and schedule work against a timeline, load and level resources, and adjust the schedule to accommodate resource crunches. Protect project plans by identifying areas prone to trouble and enhance the plan by identifying areas of opportunity. Project Planning clarifies "who will do the work," "what order and when the work will be completed," and "what to do if things go wrong." This is accomplished using the following tools: responsibility assignment matrix, network diagram, Gantt chart, resource loading and leveling charts, and Potential Problem/Opportunity Analysis.

**Project Implementation:** Get projects started smoothly by setting ground rules for surfacing issues, controlling changes, and working together. In project monitoring, track deviations from the plan and report on progress. With modification, separate, clarify, and prioritize concerns. Project closeout and evaluation reinforce the lessons learned during the project and verify whether the project delivered the results intended. The tools used here are: start to implement checklist, change authorization, status reports, and closeout checklist.

**Project Communication:** The workshop develops the management skills required throughout the life of a project. One of the most critical is Project Communication—ongoing conversations between the project manager and others to give or gather information, gain and test understanding, and determine action. Project Communication fosters success by ensuring that discussions are open, honest, and timely throughout the project. Conversations are driven by the questions contained in each step of the project management process.

Another critical project success factor is an understanding of the performance system at work in any project. KT Project Management addresses the factors that can promote project performance and influence project behavior. Our approach to managing performance can be used to support teamwork and gain commitment to the project.



## LEARNING OBJECTIVES

After completing a Project Management workshop, participants will be able to:

- State the definition of a project and distinguish a project from an ongoing job requirement
- Understand the three components of project management and describe the project management steps associated with each one
- Use all the tools taught in the workshop to manage actual job-related projects effectively
- Establish criteria for selecting project managers and subproject managers
- Identify potential problems and potential opportunities, take preventive and promoting actions, and plan contingent and capitalizing actions for them
- Monitor project progress and revise plans as necessary
- Closeout and evaluate projects against project objectives to improve how future projects are managed

## LEARNING DESIGN

Kepner-Tregoe has refined its proprietary instructional design through years of experience. The learning design:

- Provides a stimulating environment based on adult learning principles to maximize skill transfer
- Uses competency-based instruction, with case practice and on-the-job application, encouraging participant self-evaluation and program leader assessment of learning
- Devotes over 50 percent of the workshop to case practice and on-the-job application
- Incorporates instructor presentation to provide valuable information and role modeling
- Is recognized by the American Council on Education for college credits, by the National Association of State Boards of Accountancy for continuing professional education, and by the Project Management Institute for professional development units



## Workshop Flexibility

*The workshop can be customized to meet client needs by modifying program structure and content, including:*

- *Number and type of case studies and exercises used*
- *Emphasis on team or individual on-the-job application*
- *Emphasis on project management technical skills, people skills, and critical thinking skills*
- *Emphasis on using KT Project Logic<sup>®</sup>, our software overlay that can facilitate the use of Microsoft<sup>®</sup> Project*
- *Tailoring to specific project management system, software, or special procedures*
- *Timing and length of the program, including formal evening sessions and modular delivery*



# Project Management Basic Three-Day Workshop

## OVERVIEW

The KT Project Management workshop was designed in response to a universal business need and has been researched, refined, and tested for more than 15 years. It is currently used in organizations worldwide and is available in several languages. It is one of KT's comprehensive range of organizational effectiveness programs and services.

The workshop emphasizes practical application to participants' work-related projects. The flexibility of the workshop's design means it can be tailored to meet specific client needs.

Every organization today achieves results through a project focus. KT Project Management process is a proven, systematic approach to defining, planning, and effectively implementing projects to accelerate and improve business results.

## DAY ONE

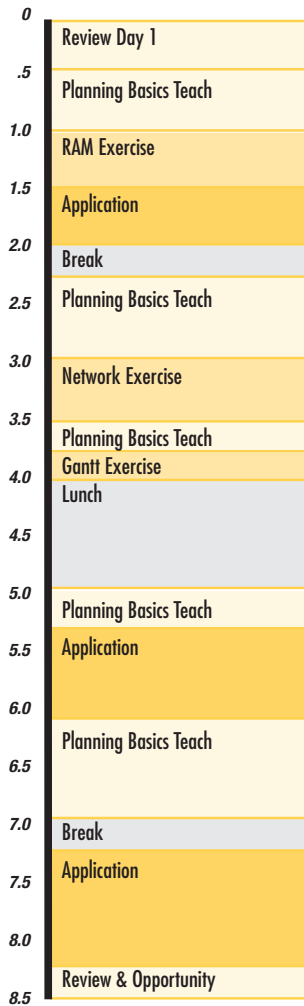
0	Opening Briefing
.5	Discovery Exercise
1.0	
1.5	Project Management Overview
2.0	Break
2.5	Definition Basics Teach
3.0	Case Practice
3.5	Application
4.0	Lunch
4.5	
5.0	Definition Basics Teach
5.5	
6.0	Case Practice
6.5	
7.0	Break
7.5	Application
8.0	Project Manager Selection
8.5	Review & Opportunity

Day One opens with workshop objectives, administrative details, and a brief introduction to project management. A case study is used to investigate participants' current approach to project management and to identify the key questions that a project management process should address. A brief description of the project management processes—Project Definition, Project Planning, and Project Implementation—and their key points completes the first major segment of the workshop. The participants then learn and practice Project Definition steps (State the Project, Develop Objectives, Develop Work Breakdown Structure, and Identify Resource Requirements) through a combination of short concept discussions and case study practices with feedback. A portion of the afternoon is dedicated to individual or small-team application of the Project Definition steps and tools to work-related projects, with presentation of the application work to the entire group. The first day ends with a discussion of the project manager role and selection. The evening assignment includes individual reading and continued application on work-related projects.

## THREE-DAY WORKSHOP APPROXIMATE TIME ALLOCATION (HOURS):

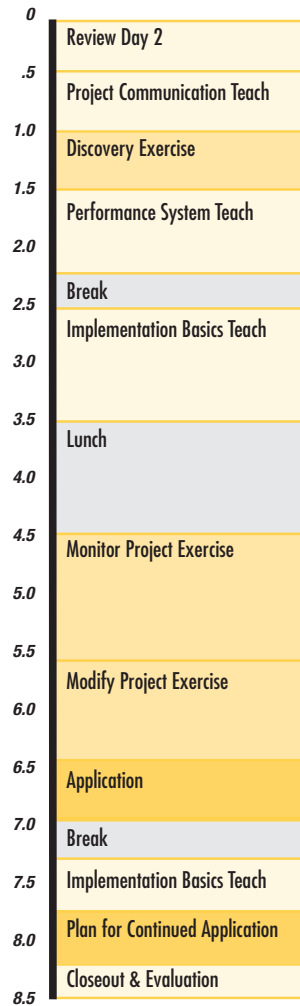


### DAY TWO



Day Two begins with a review of the project management process and the Project Definition steps and tools. Project Planning steps (Assign Responsibility, Sequence Deliverables, Schedule Deliverables, Schedule Resources, and Protect the Plan) are learned and practiced through a combination of short concept discussions and case study practices with feedback. The second day concludes with individual or small-team application of Project Planning steps and tools to work-related projects, with presentation of the application work to the entire group. The evening assignment includes individual reading and continued application on work-related projects.

### DAY THREE



Day Three starts with a review of the project management process and the steps and tools that have been discussed to date. The role of project communication and skills for effective questioning and listening are covered next. A brief case study is used to investigate participants' current approach to solving people performance issues. The project performance environment and methods for influencing behavior are discussed. The focus shifts to Project Implementation steps (Start to Implement, Monitor Project, Modify Project, and Closeout and Evaluate). These steps are learned and practiced through a combination of short concept discussions and case study practices with feedback. The third day continues with an instructor-led discussion of the factors that influence project management success. Participants identify the key success factors for their projects, then consider the steps necessary to transfer project management skills to their organizations. The third day concludes with a workshop evaluation and feedback from the participants.

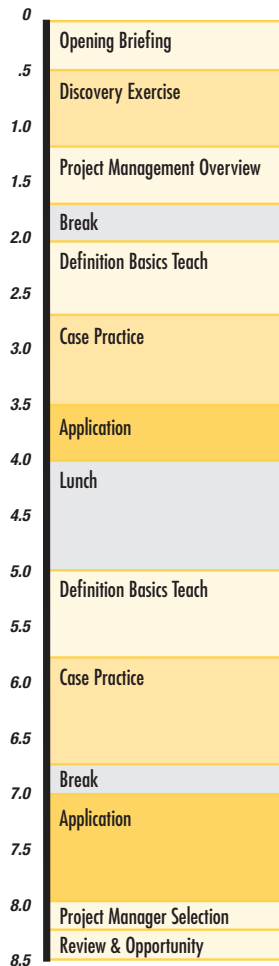


# Project Management Four-Day Workshop

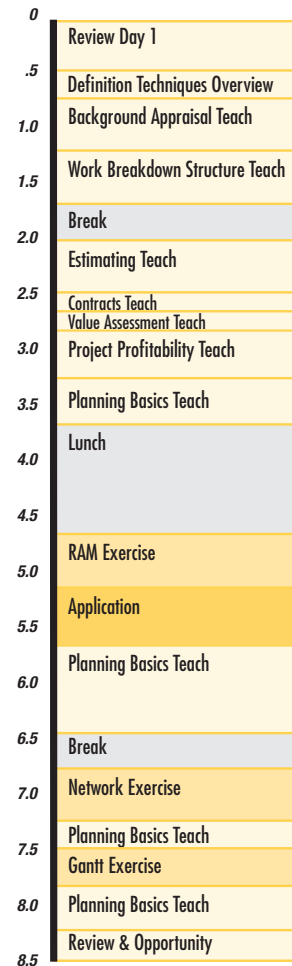
## KEPNER-TREGOE'S FOUR-DAY PROJECT MANAGEMENT

The four-day Project Management workshop includes all topics covered in the three-day workshop plus more advanced techniques. In Project Definition, these techniques include: project background appraisal; work breakdown techniques (such as work breakdown structure dictionary, performance specifications, and auditing work breakdown structures); types of estimating; establishing the project budget; types of contracts and value assessment; and, project profitability. In Project Planning, these techniques include: sequencing techniques (such as types of sequencing logic, precedence relationships, types of duration, critical path method, program evaluation and review technique, and schedule compression); resource loading and leveling; and, schedule review. In Project Implementation, these techniques include establishing milestones and earned value analysis. Additional people techniques discussed are managing involvement and meeting management.

### DAY ONE



### DAY TWO



### FOUR-DAY WORKSHOP APPROXIMATE TIME ALLOCATION (HOURS):





## DAY THREE

0	Review Day 2
.5	Application
1.0	Planning Basics Teach
1.5	
2.0	Break
2.5	Application
3.0	Planning Techniques Overview
3.5	Sequencing Techniques Teach
4.0	Lunch
4.5	
5.0	Resource Scheduling Teach
5.5	Project Communication Teach
6.0	Discovery Exercise
6.5	Performance System Teach
7.0	Break
7.5	People Techniques Teach
8.0	
8.5	Review & Opportunity

## DAY FOUR

0	Review Day 3
.5	Implementation Basics Teach
1.0	
1.5	Monitor Project Exercise
2.0	
2.5	Break
3.0	Modify Project Exercise
3.5	
4.0	Lunch
4.5	
5.0	Application
5.5	Implementation Basics Teach
6.0	Milestones Teach
6.5	Break
7.0	Earned Value Analysis Teach
7.5	
8.0	Panning for Results
8.5	Plan for Continued Application Closeout & Evaluation

## WORKSHOP PREWORK

The prework material orients participants to the workshop and provides an overview of the project management process. Workshop preparation includes asking participants to identify a current or upcoming job project for application during the workshop. Bringing the background information—project objectives, tasks, task durations and deadlines, resource requirements, and responsibilities of others—to the workshop is recommended to help with the project application work.

## WORKSHOP MATERIALS

Participants receive two books: a *Notes and Reference* manual and a *Process Guide*. The *Notes* section contains the overheads that the instructor uses to present the project management concepts. The *Reference* section includes an entire project example built with KT Project Logic software and brief accompanying explanations of how KT Project Management interfaces with Microsoft Project. The *Process Guide* contains in-depth reading on the project management process steps. It includes tips, pitfalls, examples, and practical ideas to help manage projects.

In addition, participants receive a set of worksheets in paper and electronic formats to help them apply the project management concepts. A plastic card containing the process steps and questions and a folder containing the project management process flowchart serve as job aids.





## About Kepner-Tregoe

Kepner-Tregoe (KT) provides consulting and training services to organizations throughout the world. We build competitive advantage using powerful, systematic processes for resolving business issues and achieving targeted performance improvements.

Since 1958, KT has studied how effective business leaders manage difficult business challenges. We incorporated their habits into logical, repeatable methods for rapidly resolving problems, making decisions, planning ahead, and managing people and projects. This world-renowned, rational-process approach helps maximize the critical thinking skills, knowledge, and expertise of individuals and organizations.

KT collaborates with many of the largest and most successful companies in the world to improve the way work is done and facilitate new approaches to quality, competitiveness, cost, cycle time, business strategy, and other issues. Many organizations integrate our systematic methods into their business processes, embedding a common language approach for identifying objectives, resolving issues, and integrating change.

At a time when organizations face multiple challenges—intense global competition, crushing growth and cost pressures, rapid technological advances—KT plays a vital role in helping them improve the clarity of their strategic thinking and the effectiveness of their operations.



## Kepner-Tregoe Locations

Headquarters  
United States

Australia

Canada

France  
*(serving Spain)*

Germany

Hong Kong

Ireland

Japan

Malaysia

Netherlands

Singapore

Switzerland  
*(serving Belgium)*

Taiwan

Thailand

United Kingdom

### **Also serving:**

Africa, China, India,  
and throughout Europe and  
Southeast Asia

### **Affiliates**

Brazil

Chile *(serving Argentina)*

Finland

Italy

Korea

Mexico *(serving Costa Rica,  
El Salvador, Guatemala,  
Honduras, Nicaragua, and  
Panama)*

Peru *(serving Colombia)*

Philippines

Poland

Romania

Venezuela

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WWW.KEPNER-TREGOE.COM OR  
E-MAIL US AT INFO@KEPNER-TREGOE.COM