

Project Management Fundamentals:

From Goal to Shared Plan



- Project management is delivering value, not just checking boxes



- Modern PM balances discipline with adaptive, principle-driven leadership



- A clear goal is the first step from individual contributor to plan owner



- Projects are temporary initiatives with a unique context and clear end



- This training: move from ambiguity to a scoped, shared, committed plan



The Real Cost of Unclear Projects

-  Unclear scope and mismatched expectations derail projects early
-  Only 31% of projects deliver on time, budget, and scope (Standish 2024)
-  50% are challenged; 19% fail outright—numbers nearly unchanged since 2017
-  Rework and miscommunication drain small teams faster than technical issues
-  A shared plan becomes the single source of truth, reducing risk for everyone



What First-Time Leads and Contributors Struggle With



Task design, scheduling, delegation, and stakeholder coordination



Pressure to deliver, fear of asking for help, doing everything alone



Avoiding tough conversations, overpromising, confusing activity with progress





Clarifying the Goal: What Are We Really Trying to Achieve?



- Distinguish goal (outcome) from solution (output) and task list



- Frame the project with a simple outcome statement: "What problem are we solving?"



- Ensure the goal is measurable, time-bound, and understood by everyone



- Avoid tunnel vision: define success with multiple indicators, not one metric



Defining Scope: What's In, What's Out, and How to Decide



- Scope sets the boundary: what the project delivers and what it does not



- MoSCoW: Must-have, Should-have, Could-have, Won't-have (this release)



- Must-haves are non-negotiable; limit to 50-60% of total scope



- Handle stakeholder "asks" by making trade-offs visible, not just saying yes



- Prevent scope creep: document exclusions and use a light change request process



CLEAR BOUNDARIES. **SMART PRIORITIES.** SUCCESSFUL DELIVERY.

From Tasks to Timeline: Building a Realistic Schedule



- Break scope into manageable tasks with a simple work breakdown structure



- Effort = person-hours of work; duration = calendar time to complete



- Expect duration to be 2–3x longer than effort, not 1:1



- Build a simple Gantt-style timeline with milestones, not micromanagement



- Use the timeline as a shared visual tool for weekly team check-ins



Shared Ownership: Turning Your Plan into Our Plan



- A plan created in isolation often fails during execution due to lack of commitment



- Co-create the plan using one-on-ones, workshops, and structured feedback loops



- A project plan is a record of agreements, not a document handed down



- Use RACI: Responsible, Accountable, Consulted, Informed—one A per task



- Be stingy with Consulted roles; most people just need to be Informed





Managing Risks Without Overhead



- Spot obstacles early with a lightweight risk register—no complex spreadsheets



- Assign an owner, trigger, and next review date for every risk



- Risks are future possibilities; issues are problems already happening



- Communicate trade-offs professionally: say "not yet" with clear rationale

RISK



Name

Vendor Delivery Delay



Trigger

Vendor misses committed milestone



Owner

Taylor Morgan



Next Review

May 30, 2025



Status

ON RADAR



FOCUS: Identify. Assess. Decide. Act. Review.



Handling Changes Without Chaos



- Submit every change via a standard form—what, why, and impact



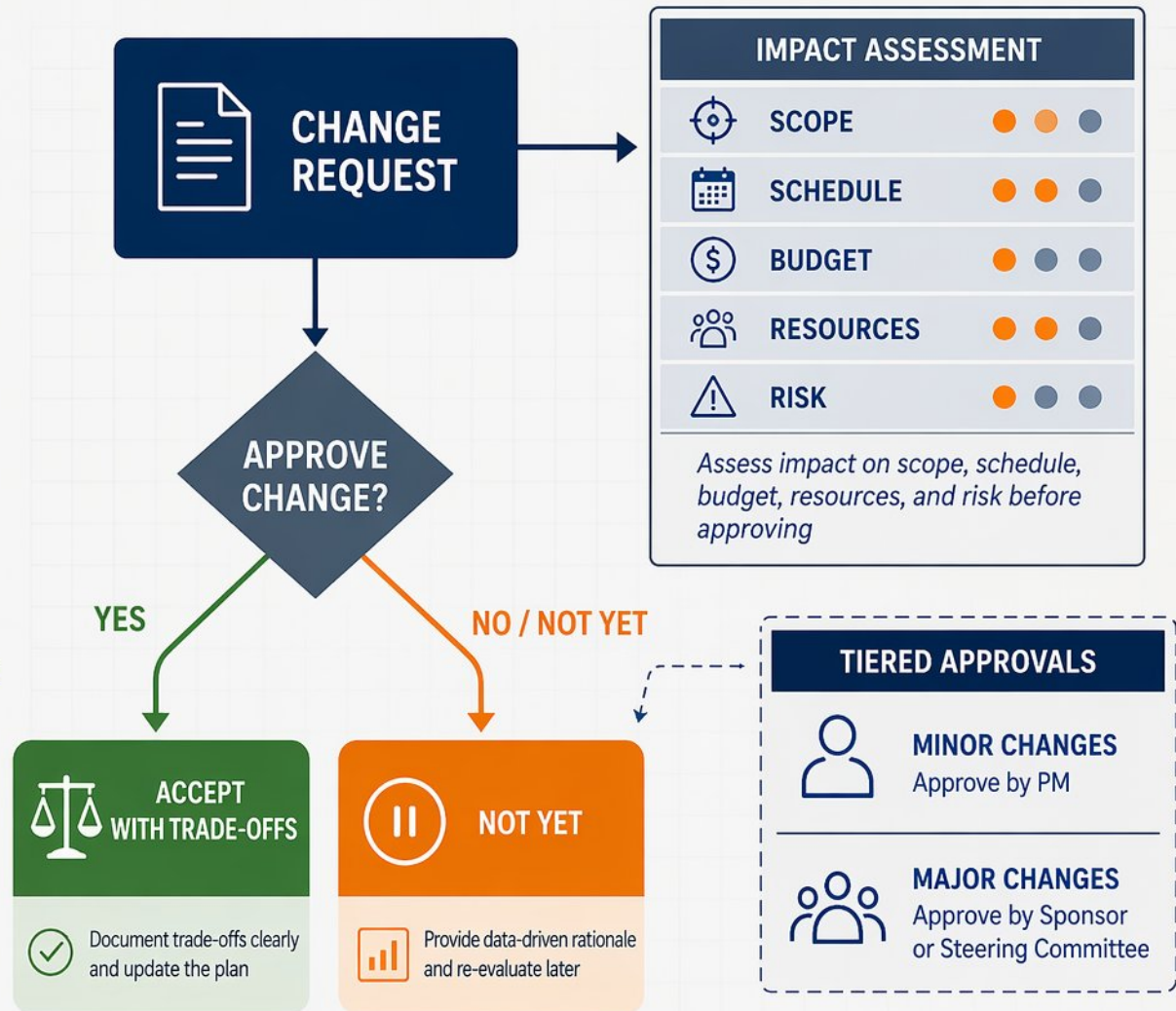
- Assess impact on scope, schedule, budget, resources, and risk before approving



- Use tiered approvals: minor changes to PM, major to sponsor or steering committee



- Say “no” or “not yet” with data, and say “yes” with clear trade-offs documented



Communicating the Plan: Kickoff That Builds Alignment



Surface disagreements early—don't just present information



Agenda: goal, scope, roles, milestones, risks, next steps



Pre-read sent 48h ahead so meeting time is for decisions



Leave with written decisions, owned actions, and a shared charter



Keeping the Team in Sync: Updates and Check-ins



DAILY STANDUP

Keep It Focused



WEEKLY REVIEW

Align and Adjust



STAKEHOLDER REPORT

Keep Everyone Informed



- Match cadence to project intensity: daily standups during active delivery, weekly reviews otherwise
- 15-minute standup, same time and place, focused on blockers, not status reports
- Three questions: what was done, what's next, what's blocking you — no problem-solving in the circle
- Adapt standups for non-software teams: morning huddles on site, SQDI format for production, tiered portfolio syncs

Closing the Loop: Review, Retrospective, and Lessons Learned



- A project isn't complete until the team reflects together and captures knowledge



- Use Start-Stop-Continue to identify new ideas, remove blockers, and reinforce wins



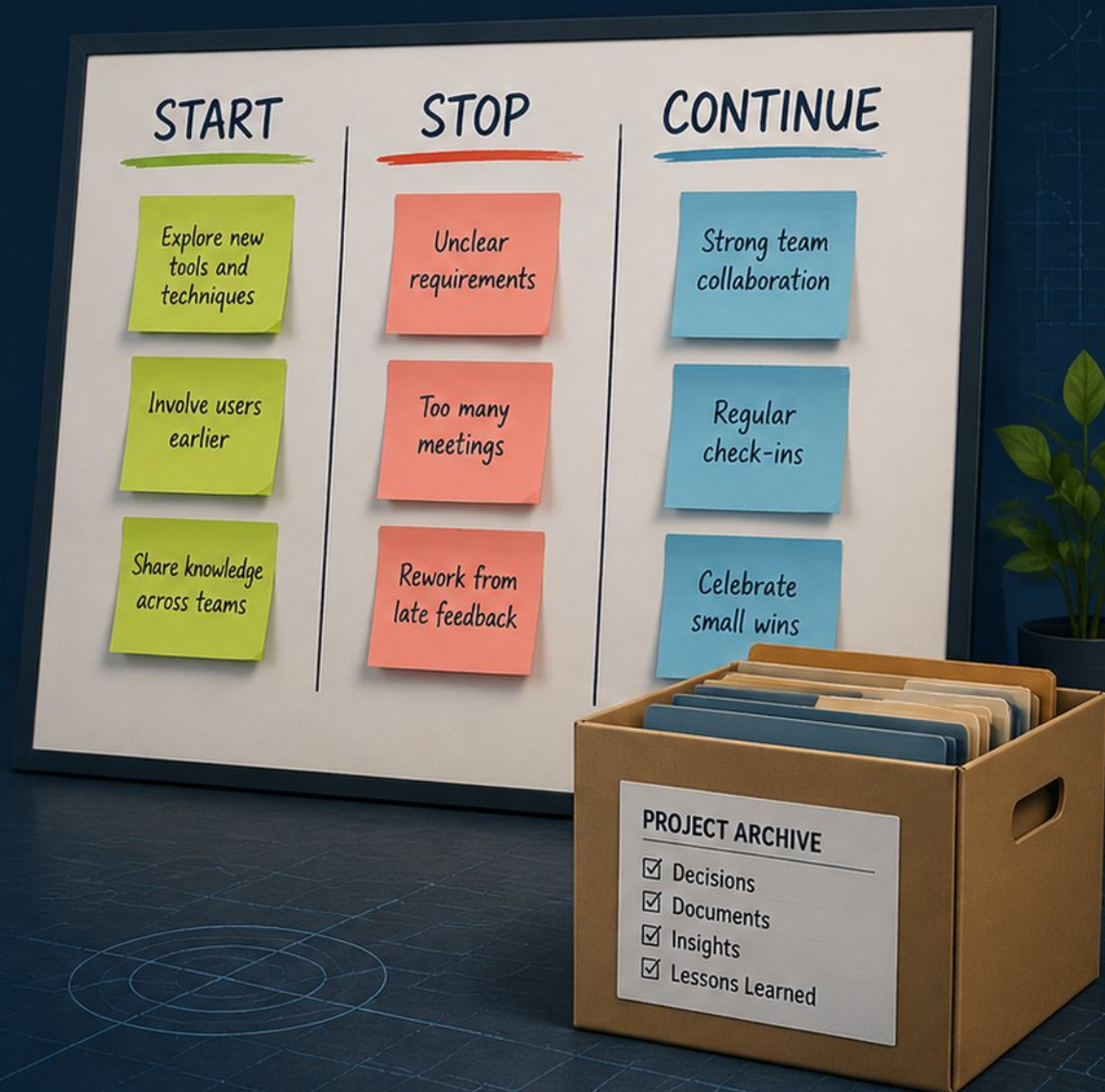
- Prioritize 2-3 actionable items with a clear owner and deadline



- Keep retrospectives blameless; focus on learning, not accountability



- Archive key decisions, documents, and insights so future projects benefit



Your First 30 Days:

Putting Fundamentals into Practice



- Define mission, map people, sketch plan, build trust early



- Pick a small, visible project with a supportive sponsor



- Learn and observe before making rushed changes



- Avoid treating the plan as reality—adapt when needed



- Don't overcomplicate: clarity and communication over complexity



Key Takeaways and Next Steps



- Core flow: goal → scope → plan → ownership → risk → change → communication → closure



- Mindset shift from doing the work to leading the work



- Build clarity, predictability, and shared ownership in every project



- Next step: pick one project, define the goal, run a simple kickoff



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