

My Way Forth: Project Management Basics Course Workbook

This workbook is intended as a companion to the lessons in the My Way Forth: Project Management Basics course.

In this workbook you'll find space to take notes, jot down thoughts, or document key points you want to recall for later. We've also mixed in some reflection questions to help you apply the material to your personal experience, as well as a brief assessment at the end of each lesson to be sure you understand the key themes and topics.

We have also included several project planning templates referenced in the lessons. These are also available for download on yourwayforth.com.

Lesson 1: What is project management?

Notes:

Reflection: What are your goals for taking this course? What would you like to achieve, or in what areas would you like to grow?

Reflection: When have you used project management principles or elements in the past whether you realized it or not? Describe 1-2 instances.

Assessment

What is project management?

Project management refers to leading a _____ to achieve _____ on _____ and on _____.

What are a project manager's two main objectives?

Besides monitoring timelines and budgets, what are other key elements of successful project management? (Name up to four.)

Reflection: Have you ever been challenged with an unorganized project with multiple constraints or restrictions? How did you deal with those constraints?

Reflection: Who were the key players involved in that project?

Reflection: What was the overall outcome of your project? Having learned the content in this lesson, what would you have done differently?

Assessment

What are the six steps to successful project planning?

During critical points during a project, who makes the final decision?

What are the three primary constraints one may face when starting a new project?

Reflection: On a scale of 1-5, 5 being the best, how would you rate your current communication system?

1 2 3 4 5

Reflection: Who in your current or previous project teams do you identify as stakeholders?

Reflection: Which of the communication resources below do you currently use? Which of these resources would you be interested to learn for more effective communication?

- Conducting Meetings
- Meeting notes
- Email
- Slack
- Project management tool (e.g., Asana, Monday.com, etc.)

Assessment

Which statements are true about a stakeholder? You may choose multiple answers.

- Stakeholders are those who have a viable interest in the project.
- Stakeholders can be employees, investors, customers, suppliers or the executive team of an organization.
- Stakeholders related to projects should receive regular updates on the progression of goals.
- Stakeholders typically want high-level updates.

Which of these is considered proactive communication?

- Responding to issues and crisis with your team as they arise
- Establishing regular and consistent communication to update or collaborate with your team

When creating tasks, clear and actionable communication should include (choose all that apply):

- All pertinent details
- Identifying the assignee, the request, due date, and priority of the task
- Clarification within the communication answering any anticipated questions

Assessment questions – Answer key

Lesson 1

What is project management?

*Project management refers to leading a **project** to achieve **all project goals on time and on budget**.*

What are a project manager's two main objectives?

Making sure your project team understands what they need to do by when

Ensuring that project leadership is kept up to speed on the work's status with regular reporting

Besides monitoring timelines and budgets, what are other key elements of successful project management? (Name up to four.)

Relationship management and team building

Team and stakeholder expectation management

Consistent, clear, and proactive communication

Increasing efficiency and effectiveness through process

Lesson 2

What are the six steps to successful project planning?

Identify project team members

Identify project stakeholders

Draft a scope document

Plan and lead the project kick-off meeting

Finalize the scope document

Develop the communication plan

During critical points during a project, who makes the final decision?

Key decision maker

What are the three primary constraints one may face when starting a new project?

Scope, timeline, budget

Lesson 3

Which statements are true about a stakeholder? You may choose multiple answers.

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- Stakeholders can be employees, investors, customers, suppliers or the executive team of an organization.
- Stakeholders related to projects should receive regular updates on the progression of goals.
- Stakeholders typically want high-level updates.

Which of these is considered proactive communication?

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When creating tasks, clear actionable communication should include (choose all that apply):

- All pertinent details
- Identifying the assignee, the request, due date, and priority of the task
- Clarification within the communication answering any anticipated questions

PROJECT UPDATE EMAIL TEMPLATE

Subject:

Weekly [Project Name] Update: [Date]

Body:

Hello,

Here's the weekly **[project name]** update. As always, please reference the [Table of Contents](#) for key links. **[if applicable]**

Topic 1 - On track / At risk / Delayed

- Quick bullet points with updates on project status, what was accomplished this week, what's coming up next week, etc.
- List any blockers or feedback needed from stakeholders

Topic 2 - On track / At risk / Delayed

- Quick bullet points with updates on project status, what was accomplished this week, what's coming up next week, etc.
- List any blockers or feedback needed from stakeholders

Topic 3 - On track / At risk / Delayed

- Quick bullet points with updates on project status, what was accomplished this week, what's coming up next week, etc.
- List any blockers or feedback needed from stakeholders

Thanks and as always let me know if you have any questions.

KICK-OFF MEETING AGENDA TEMPLATE

[MEETING NAME]

[Date, Time]

[Attendees]

GOALS:

- Discuss and solidify the project scope.
- Solidify communications expectations and PM tools.
- Identify next steps.

AGENDA:

Review scope document, noting specifically:

- Are there any red flags, potential hurdles, or unanswered questions?

Risk assessment:

- Ask the team: *Fast forward to the end of this project, and it has fallen flat on its face. It's either crazy late, way below the intended scope, or isn't adopted in the way you expected. What happened?*

Review any changes that should be made to the scope

Solidify communications expectations and PM tools:

- Which tools will we use to communicate? (e.g., PM tool, Google Sheets, Slack, text, emails, etc.)
- How will this team agree to use them? (e.g., frequency of engagement & the intent of each tool).
- Where and how will we store central files?
- Are there any other stakeholders or people outside the project team who will need regular updates?

Identify next steps

- Send notes to the team and post them in a central place.
- Send the updated Project Scope to the team and Project Sponsor.
- Set up the PM and communication tools.
- Set up the next project check-in.

GANTT CHART TEMPLATE

A basic template for a Gantt chart for your project can be found on the Way Forth Collective website. This is a document that will spell out the who, what, and when of the actual work required to complete the project. Consult with your project team and stakeholders, and map out the tasks that will be required to complete each deliverable.

Task	Responsible	Due Date	Q1			Q2			Q3			Q4		
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Project Phase 1														
Deliverable 1	[Name]	Apr-22												
Deliverable 2	[Name]	May-05												
Milestone 1	[Name]	May-21												
Deliverable 3												
Project Phase 2														
Deliverable 4												
Deliverable 5												
Milestone 2												

PROJECT SCOPE

PROJECT NAME



(Project basics: who, what, and when)

PROJECT OVERVIEW

PROJECT OWNER(S)	DATE CREATED	SCOPE STATUS
		Draft In Review Approved
PROJECT OBJECTIVES		
PROJECT CONTEXT		
PRIMARY AUDIENCE		

PROJECT DELIVERABLES

Differentiate between the deliverables that are essential vs. those that would be nice if the time and scope allows.

DELIVERABLE	DESCRIPTION	Essential or Optional?
1.		
2.		
3.		
4.		
5.		

ROLES & RESPONSIBILITIES

NAME	ROLE	RESPONSIBILITY & EXPECTATIONS
	Project Sponsor	Guides the project owners, provides context and direction.
	Project Owner	Leads the PM team, ensures direction of project is aligned with goals set by the Sponsor.
	Project Manager	Ensures project goals are delivered according to timeline, supports meetings and assigns action items.

PROJECT TIMELINE AND MILESTONES

[Insert link to live/working roadmap]

Task	Q1			Q2			Q3		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Project Phase 1									
Task 1									
Task 2									
Milestone 1									
Task 3									
Project Phase 2									
Task 4									
Task 5									
Milestone 2									

PROJECT CONSTRAINTS

CONSTRAINTS

Things the project needs to consider during the life-cycle of the project and/or limitations of the project. For example, project budget, project timeline to be complete, resources that must be used, etc...

PROJECT ASSUMPTIONS

ASSUMPTIONS

Things you are assuming to be true about the project which will help guide project decisions. For example: customer will have access to technology, venue will be able to provide catering, team is qualified to consult, etc...

OUT-OF-SCOPE

This project's deliverables **will NOT include** the following:

- *Product will not be available in app stores*
-
-

RISK ASSESSMENT

RISK	LIKELIHOOD

COMMUNICATION STRATEGY

Type of Communication	Method	Frequency	Responsible Party
Team Update Meetings	In-Person/Zoom	Monthly	Project Manager
Informal Communication	Slack	Daily	Team
Document storage and collaboration	Google Drive	Daily	Team
Key Stakeholder Updates	Email	Monthly	Project Owner