
Integrating PM Principles Into Daily Productivity

Presented by Sheri Crosby, PMP and Rachel Molina



Agenda

- Introductions
 - Who are your facilitators today
- 3 Essentials to know
- Wrap Up



Prepare a Task List

HOW I GET THINGS

D  **NE**



Practice Time Tracking

THOSE WHO HAVE TIME:
STAND IN LINE HERE



THOSE WHO DON'T HAVE TIME:
STAND IN LINE HERE



Make a Habit of Status Reporting



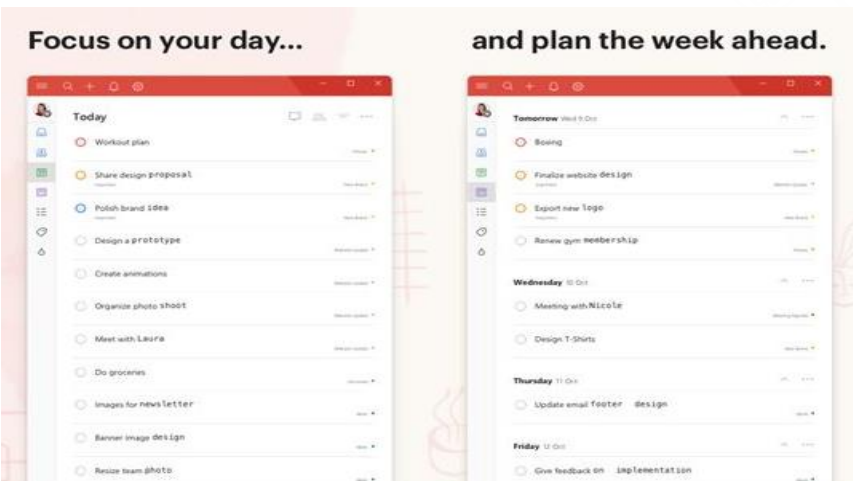
Tools

- A few helpful resources that you can use:
 - [Pomodoro Method Description](#)
 - [Status Report Template](#)
 - [Task List Template](#) (see the Actions tab)
 - [ToDoist](#)



ToDoist

Monthly Status Report



Project Name Overall Status: G
 Project Sponsor: Sponsor or Business Partner Name | Project Manager: Project Manager Name Schedule: Y Budget: G People: G Scope: R

Discovery > Planning > Design > Build > Testing > Deliver & Close

Description: Make this a brief description of project
 Start Date: 1/1/18 Original Go Live: 1/1/19 Revised Go Live: 3/1/19

| Progress and Deviations from Plan | Schedule (Major Deliverables/Milestones) | Date | Status |
|--|--|-------------------|-------------|
| <ul style="list-style-type: none"> Read and delete the following before starting: Provide a brief report of any parts of the project that are NOT progressing as planned, and what is being done to address this. Any time you report Red or Yellow status, in one of the status fields, you must state why the status is at risk. Achievement of major accomplishments, key milestones or other significant measure of progress towards the key milestones may be noted. This section is NOT to just be a commentary on what you and your team did last month or have planned for the next month. If there is a need to record this for audit purposes or to demonstrate the activities to the client, then put this in another report. | <ul style="list-style-type: none"> Complete Build Phase User Acceptance Testing complete | 2/1/19 2/15/19 | C Y R |

Schedule Variance Guide: (remove and delete guide)
 C – Milestone Complete, G – Tracking to delivery date, Y – Projected to deliver within 10% of planned date, R – Projected to deliver more than 10% late

| Issue Description | Priority | Risk Description | Exposure |
|--|-------------|---|----------|
| <ul style="list-style-type: none"> Make sure your issue is easily understandable. Address in Progress section Timeframe: NOW Negative Priority Matters | H H M | <ul style="list-style-type: none"> Make sure your risk is easily understandable. Address in Progress section Timeframe: FUTURE Probability and Impact Matter Frame as: If [event happens] then [consequence realized] | M H |



Resources

- [UChi IT Services Project Management Office \(PMO\) website](#) and [templates](#) page
- [PMI.org](#) – Project Management Institute (certification, learning)
- <https://www.projectmanagement.com> – training, templates
- <https://www.projectengineer.net>– training, information
- <https://www.cio.com> – executive level approaches to Project Management. Search for ‘Project Management’
- [LinkedIn Learning](#) - courses on Project management free to UChi community– Search for ‘Project Management Foundations’
- <https://www.workamajig.com/blog/topic/operational-excellence> – software vendor, but the Operational Excellence Blog is helpful
- <https://www.projectmanager.com> – software vendor, but Blog and Templates area is helpful.



Feedback & Questions

Contact: [ITS PMO](#)

Today's Facilitators:

- Sheri Crosby, PMP: scrosby@uchicago.edu
- Rachel Molina: rmoli@uchicago.edu



Thank You

***Next up: Creating Online Documentation and
Communication for a Project***

