



# Small Project Management<sup>SM</sup>

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## Why This Course?

Duration: 2 days

You spend up to 75% of your time in project-related work. However, much of this work consists of small projects, that you don't manage as projects. Rather, you treat it as *work that needs to be done by the end of the month*. Thus, this unmanaged work just "happens". In this era of responsiveness and quality improvement, letting small projects "happen" is no longer acceptable.

Can our project management methods help small projects in the same way the methods help larger projects? **Yes!** This case-oriented workshop shows how to apply basic techniques to managing, understanding and coordinating small projects. At the same time, the techniques are fully compatible with our methods for larger projects.

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## Learning Objectives

- Define Project Management. Discuss the unique challenges of small projects, the skills needed to make small projects successful, and the methods that can keep them small.
  - Describe the 3D Life Cycle; discuss the purpose and benefits of each project phase. Begin the project with clear definition of the business need.
  - Begin planning the project by prioritizing multiple current projects. Tailor the Small Project WBS Template to create a work plan framework at an appropriate level of detail.
  - Estimate effort and duration using the Small Project Worksheet. Describe how to produce more accurate, useful estimates.
  - Schedule the project, using methods that work best for one-person and multi-person staffing.
  - Discuss the importance of involving others in appropriate project activities, and the challenges and strategies for doing so.
  - Describe the use of Quality Assurance Reviews and Change Control in small projects.
  - Describe the activities of the Design and Deliver Phases and the value of each to the project.
  - Apply minimum-effort project tracking methods and evaluate project progress.
  - Scale Small Project Management techniques for smaller or larger projects. Describe the benefits of applying these small project management techniques.
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## Audience

This workshop is for every professional who spends time on small projects, namely, those projects that take up to 360 work-hours of effort and less than three months to complete. Although the workshop focuses on techniques for managing small projects, the techniques are useful for larger projects as well.

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## Course Outline

### 1. Defining The Project

Challenges of Small Projects; Small Projects Characteristics; Ways to Keep Small Projects Small  
Successful-Project Skills; Why Not “Just Do It”? The 3D Life Cycle; The Small Project Roadmap  
SP10 Size Project and Plan First Phase

Forecast Project Size; Evaluate Project Risks; Review Your Charter

Structure SP1 Define Phase; Case 1: Start the Project

SP11 State the Problem or Opportunity

Questions for a Problem-Solving Project; Questions for an Opportunity-Seizing Project

SP12 Define Scope and Objective; Case 2: Problem Analysis and Objectives

SP13 Understand the Current Environment

SP14 Define Requirements for an Acceptable Solution; Case 3: Environment and Requirements

Small Project Road Map Progress; Relating SP1 Define to the Basic 9 Results

Summary: Defining the Project

### 2. Planning The Project

SP15 Establish Project Priority; Recording Priorities: The Master Project Worksheet

The Priority Grid; Case 4: Establish Priority

SP19 Review Phase Results and Plan Next Phases; Project Management Techniques

Project Management Body of Knowledge (PMBOK)

Plan Step A. Structure Next Phase; Structure With Re-usable Small Project WBS Templates

Guidelines for a Good WBS; Case 5: Structuring with WBS Templates

Plan Step B. Estimate Phase Activities; Activity Estimating; Using the Small Project Worksheet

Case 6: High/Low Consensus Estimating; Small Project Costs;

Converting Effort to Duration; Case 7: Effort—Duration Conversion

Plan Step C. Schedule the Project; Scheduling With a Calendar; Case 8: Calendar Scheduling

Scheduling With A Gantt Chart; Case 9: Gantt Scheduling; Summarize the Plan

Summary: Planning the Project

### 3. Coordinating The Project

Leading by Involving Others; Strategies for Involving Others

Quality Assurance Reviews; Controlling Change

The SP2 Design Phase Activities; SP24 Develop Test and Validation Plan

The SP3 Deliver Phase Activities; Too Often Skipped: Testing, Documenting and Training

Minimalist Project Tracking; Case 10: Project Tracking

SP37 Customer Accepts Solution

SP39 Evaluate Solution and Process

Scaling the SPM Techniques For Larger and Smaller Projects

Final Exam: Small Project Management