

# Integrating PM Best Practices into Standard Tools

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# Overview

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- ❑ Moving beyond text-laden procedures
- ❑ Benefits of written best practices
- ❑ Benefits of standard tools
- ❑ Focus on performance improvement
- ❑ Templates, samples
- ❑ Best practices embedded into tools

# Written Best Practices

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## □ Positives

- Written, so they can be followed
- Good for initial training and audits

## □ Shortcomings

- Can get very lengthy
- Not typically easy to use on the job
- Tend to focus on more theoretical task completion

# Typical Process Definitions

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- ❑ Text-driven
- ❑ Very procedurally driven
- ❑ Tend to not be “user friendly”
- ❑ Important purposes organizationally but not the best in practice

# Exhibit A: Procedure 1

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- Typical Procedures Documentation
- Exhibits available at
  - [www.LisaLaCourse.com](http://www.LisaLaCourse.com)

# The Next Step

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- Written best practices and procedures are important...
- But the next step is to develop practical, standard templates

# Standard Templates

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- ❑ Blank document with some formatting
- ❑ Does include best practices from a process and data perspective
- ❑ Can include instructions
- ❑ For use on the job, during process completion
- ❑ Should be consistent with procedures

# Create a Template

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- ❑ Gather best practices from PMs in field
- ❑ Incorporate PMBOK best practices
- ❑ Gather examples from PMs
- ❑ Focus on some standard template styles and formatting

# Exhibit B: Template 1

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- Communications Plan Template
- Exhibits available at
  - [www.LisaLaCourse.com](http://www.LisaLaCourse.com)

# Exhibit C: Template 2

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- Risk Management Plan Template
- Exhibits available at
  - [www.LisaLaCourse.com](http://www.LisaLaCourse.com)

# Enhancing the Template

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- Add detailed instructions for each section or action
- Turn it into a Form or .dot
- Give one example row

# Tools with Best Practices

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- ❑ Now, not only provide the template with instructions but add best practices as content
- ❑ Actual projects and PMs are the best source
- ❑ Can be incorporated as part of a process improvement project
- ❑ Include expectations of continuous improvement

# Exhibit D: BP Tool 1

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- Communications Plan Tool
- Exhibits available at
  - [www.LisaLaCourse.com](http://www.LisaLaCourse.com)

# Exhibit E: BP Tool 2

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- Risk Management Plan Tool
- Exhibits available at
  - [www.LisaLaCourse.com](http://www.LisaLaCourse.com)

# Exhibit F: BP Tool 2

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- Schedule Jump Start Tool
- Exhibits available at
  - [www.LisaLaCourse.com](http://www.LisaLaCourse.com)

# Process and Skills are Inadequate

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- ❑ Organizations focus too heavily on training and process documentation
- ❑ Performance improvement and project results predictability improve greatly with on-the-job support tools
- ❑ People don't have to start with a blank sheet of paper each time
- ❑ Help them execute the BP with tools

# Improving Performance

	Information	Instrumentation	Motivation
EXTERNAL	<input type="checkbox"/> <i>Directional</i> <input type="checkbox"/> <i>Confirmation</i>	<input type="checkbox"/> <i>Tools and equipment</i> <input type="checkbox"/> <i>Procedures</i> <input type="checkbox"/> <i>Resources</i>	<input type="checkbox"/> <i>Incentives</i>
INTERNAL	<input type="checkbox"/> <i>Knowledge and training</i>	<input type="checkbox"/> <i>Capacity</i>	<input type="checkbox"/> <i>Motives</i>

# Interventions: External

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## Information

### *Directional*

- ❑ Provide direction that is sufficient, accurate, specific (measurable), consistent, simple, timely
- ❑ Provide good models of behavior

### *Confirmation*

- ❑ Provide timely, concise, constructive feedback

# Interventions: External

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## **Instrumentation**

### ***Tools and equipment***

- Provide tools and equipment

### ***Procedures***

- Ensure procedures are efficient, sound, at appropriate level, free of tiresome repetition

### ***Resources***

- Provide adequate materials, supplies, assistance
- Tailor resources to job

# Resources: On-the-Job Tools Embedded with Best Practices

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- ❑ Weekly status meetings
- ❑ Monthly sponsor reviews
- ❑ Communications methods
- ❑ Quantitative, historical risk data
- ❑ Best practice mitigation strategies

# Resources: Jump-Start Tools with Standard Project Approaches

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- ❑ Project Type Toolkits
- ❑ WBS structure for standard deliverables
- ❑ Completed samples from previous projects (Knowledge Base)

# Interventions: External

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## Motivation

### *Incentives*

- Provide financial rewards
- Provide non-financial rewards
- Remove punishment for performing well
- Remove incentives to perform poorly

# Interventions: Internal

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## Information

### *Knowledge and training*

- Communicate consequences
- Teach essentials
- Teach technical concepts
- Provide job aids

# Specific Examples: Training

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- Instructor-led training
- E-learning
- Project simulation
- Training from outside or inside
- New hire orientation
- Lunch and learn
- Video
- Real project workshops

# Interventions: Internal

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## Instrumentation

### *Capacity*

- Systems for internal controls (IT)
- Program Management

# Interventions: Internal

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## Motivation

### *Motives*

- Incentives for compliance
- Build personal goals

# Questions?

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- Thank you.
- I'll post the actual templates provided (except the schedule) on my website:
  - [www.LisaLaCourse.com](http://www.LisaLaCourse.com)
- A PDF of the slides will be available through PMI.