*Project Management Improvements*

*Project Management Learning Needs*

Initial Discussion Worksheet

*A set of discussion topics focused on providing an initial basis for understanding needed project management improvements and learning needs.*

***Basic Version 2.0 – 2016***

*This is Updated Periodically, the Latest Version can be Found at* [*www.manageprojectsbetter.com*](http://www.manageprojectsbetter.com)

*Developed and Provided by*

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NOTE

This survey is intended to provide only an initial and very top level view of potential improvement and learning needs and is not a substitute for a comprehensive project management evaluation also available. See “Summary” for more details.

**USAGE LIMITATIONS**

*This survey is provided to the recipient for the purpose of performing a quick and top level evaluation of project management functions within the recipient’s organization. The recipient is authorized to copy, distribute and use this document within their respective organization for this stated purpose. The sale or any other commercial purpose other than stated above is strictly prohibited.*

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**Summary**

What and Why

Making improvements in project management and developing an understanding of PM learning needs, requires multiple steps. The following steps are often critical.

Step 1 - The environment that an organization’s projects fit within needs to be understood to form a context for, and to develop a focus of, more specific PM evaluations.

Step 2 - Specific PM evaluations or assessments that look at the individual and fundamental aspects of project management are accomplished.

Step 3 – Alternative improvement actions are identified to correct root causes found in step 2 and business case analysis can be used to select the most appropriate improvement actions.

How to Do It – Resources Available

* This worksheet supports Step 1 above.
* Step 2 above can be supported via more detailed evaluations that can be found at: <http://www.manageprojectsbetter.com/site-map-text.html>, look under “Assessments”.
* Business Case analyses can be support with materials at <http://www.manageprojectsbetter.com/business-case-worksheets.html>
* PM improvements in general can additionally be supported with various resources available at <http://www.manageprojectsbetter.com/all-improvements.html>

Options for Implementation

* Option A) Individual Review and Evaluation – Any individual within an organization can use this worksheet to form an initial set of information on project management to support improvements.
* Option B) Team Discussion – A team approach can be very effective where a group of individuals knowledgeable in projects completed in the organization meet and use this worksheet as a discussion agenda and to capture ideas in support of subsequent PM evaluation and improvements.
* Option C) Discussions with External PM Expert – A productive option can be to work with an external PM expert to discuss the topics included here with a team of individuals knowledgeable in organization projects and their challenges. Using this approach, the expert can ask follow-up questions and facilitate group discussions to provide more in-depth understanding of the organization’s project management improvement environment while also building consensus of these needs within the team.

*Project Management Improvements*

*Project Management Learning Needs*

Initial Discussion Worksheet

1. **PROJECT IMPORTANCE - Are successful projects important to organization success?**

Check ONE that best describes project importance

[ ]  *Most important, performing projects is the core function of the organization*

[ ]  *Very important, projects are key part of organization success*

[ ]  *Important, but projects are only one of many things the organization does*

[ ]  *Not that important*

Comment (Optional):

1. **PROJECT TYPES - What types of projects does the organization perform?**

Check ALL types of projects that exist within the organization:

[ ]  *Procedure or Process Developments or Improvements*

[ ]  *Studies and Analyses, R&D, Investigative*

[ ]  *Business Case Analyses*

[ ]  *Software Developments, New or Modifications*

[ ]  *Hardware Developments, New or Modifications*

[ ]  *Production*

[ ]  *Strategic Planning*

[ ]  *Capital Improvement – Facilities, Equipment*

[ ]  *Capital Improvement – IT Infrastructure*

[ ]  *Capital Improvement – Other:*

[ ]  *Organizational Changes and Initiatives, Communications Initiatives*

[ ]  *Marketing, Planning and/or Campaigns*

[ ]  *Event Management*

[ ]  *Development / Implementation of Personnel Development Efforts, Training*

[ ]  *Development or Improvements in Customer Service Functions*

[ ]  *Other Project Type (State):*

[ ]  *Other Project Type (State):*

Comment (Optional):

1. **TEAM SIZE - Project team size can be….**

Check ALL that apply:

[ ]  *2 to 4* [ ]  *5 to 9* [ ]  *10 to 20* [ ]  *20 to 100* [ ]  *More than 100*

Comment (Optional):

1. **PROJECT DURATIONS - Project durations can be….**

Check ALL that apply:

[ ]  *Several Weeks* [ ]  *Several Months* [ ]  *6-12 Months* [ ]  *Multiple Years*

Comment (Optional):

1. **PROJECT OUTCOME SUCCESS - Projects are completed with intended outcomes, i.e. projects do deliver what is needed.**

Check ONE:

[ ]  *Always* [ ]  *Often* [ ]  *Not Often* [ ]  *Virtually Never*

Comment (Optional):

1. **BUDGET AND SCHEDULE PERFORMANCE SUCCESS - Projects are completed within planned budget and schedule goals.**

Check ONE:

[ ]  *Always* [ ]  *Often* [ ]  *Not Often* [ ]  *Virtually Never*

Comment (Optional):

1. **PROJECT TOP PRIORITIES –** For most projects, the quality of the project’s outcome, meeting budget and schedule are all important, but there is often one project goal that is more important than the others.

Check ANY of the following that best describes top priorities for projects

[ ]  *Quality of the project’s deliverable is the top priority, meeting budget and schedule are important but secondary*

[ ]  *Meeting schedule is the top priority and cost and quality are important but secondary*

[ ]  *Staying within budget is the top priority and schedule and quality are important but secondary*

[ ]  *The top priority varies with the respective project but is usually constant*

[ ]  *The top priority varies with the respective project and changes*

[ ]  *The top priority is typically not identified or not known*

[ ]  *The project starts with one priority, but things change and the new priority is unclear*

[ ]  *Other situations, State:*

Comment (Optional):

1. **UNDERSTANDING PM FUNDAMENTALS - Project managers and project teams understand project management fundamentals such as project requirements, project plans and controls.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **APPLYING PM FUNDAMENTALS - Project managers and project teams apply project management fundamentals, such as project requirements, project plans and controls to the extent necessary to support a successful project.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **PROJECT INITIATION - Projects start with reasonably stated, documented and understood requirements, scope and intent.**

[ ]  *Often* [ ]  *Sometimes* [ ]  *Not Often* [ ]  *Unknown*

Comment (Optional):

1. **STAKEHOLDER UNDERSTANDING AT START - Projects start with all stakeholders holding a common understanding of project requirements, scope and intent.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **MANAGING CHANGES - When changes to project intent, work scope, resources, budgets or schedule occur, the project and the organization are able to effectively re-adjust their operations to support a successful project completion.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **STAKEHOLDER UNDERSTANDING OF CHANGES – When changes to project intent, work scope, resources, budgets or schedule occur, projects stakeholders hold a common understanding of project requirements, scope and intent.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **PERSONNEL RESOURCES – Projects are staffed with adequate personnel resources in terms of the number of needed team members and in terms of needed skills.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **NON-PERSONNEL RESOURCES – Projects have adequate non-personnel resources (facilities, tools, equipment, materials, etc.).**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **TEAMWORK - Project teams demonstrate teamwork and work together to make the project successful.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **STAKEHOLDER WORKING RELATIONSHIPS - Project stakeholders external to the team (sponsors, customers, leadership, etc.) demonstrate productive working relationships sufficient to support successful projects.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **SUBCONTRACTOR MANAGEMENT - Where projects employ subcontractors, vendor or suppliers, these efforts are sufficiently defined and managed to support project success.**

[ ]  *Mostly* [ ]  *Some* [ ]  *Not Really* [ ]  *Unknown*

Comment (Optional):

1. **PROJECT TEAM PERSPECTIVE – Project teams believe projects are adequately structured and managed to support project success.**

[ ]  *Yes* [ ]  *Some* [ ]  *No* [ ]  *Unknown*

Comment (Optional):

1. **LEADERSHIP PERSPECTIVE - Leadership believes projects are adequately structured and managed to support project success.**

[ ]  *Yes* [ ]  *Some* [ ]  *No* [ ]  *Unknown*

Comment (Optional):

1. **ROLES AND DECISION AUTHORITIES – Roles and decision authorities of stakeholders associated with projects are sufficiently defined, understood, accepted and implemented to support project success.**

[ ]  *Yes* [ ]  *Some* [ ]  *No* [ ]  *Unknown*

Comment (Recommended):

1. **PM INFRASTRUCTURE – Project management infrastructure in terms of project managing processes, tools, systems and other needed support exist in sufficient quantity and quality to support successful projects.**

[ ]  *Yes* [ ]  *Some* [ ]  *No* [ ]  *Unknown*

Comment (Recommended):

1. **KNOWN IMPROVEMENT NEEDS - If the organization is aware of specific improvements needed in project management, what are those improvements?**

Check ALL areas known to need improvement:

[ ]  *Statement of Project Need, Project Scope, Project Intent, Project Charter*

[ ]  *Business Case Analysis to Select and Define Projects*

[ ]  *Requirements for the Project’s Deliverable*

[ ]  *Project Startup and Formation*

[ ]  *Project Work Identification*

[ ]  *Project Resource Estimating, Budget Estimating*

[ ]  *Project Schedule Development*

[ ]  *Managing Project Requirements and Scope*

[ ]  *Managing Project Schedules*

[ ]  *Managing Project Costs*

[ ]  *Risk Management*

[ ]  *Leadership*

[ ]  *Project Team Building, Motivating Teams, Handling Difficult Team Situations*

[ ]  *Project Team and Stakeholder Communications, Meeting Management, Reporting*

[ ]  *Managing Changes in Project Scope, Resources, Budgets and Schedules*

[ ]  *Management of Procurements or Subcontracts*

[ ]  *Stakeholder Management, Sponsor Relations*

[ ]  *Customer Management*

[ ]  *Portfolio Management*

[ ]  *Project Management Infrastructure (PM processes, tools and systems)*

[ ]  *Project Management Ethical Considerations*

[ ]  *Organization Strategic Planning That Drives Project Identification*

[ ]  *Other (State):*

[ ]  *Other (State):*

[ ]  *Other (State):*

[ ]  *Other (State):*

[ ]  *Other (State):*

Comment (Recommended):

**Additional Comments (Optional but Recommended)**

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**END OF**

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Project Management Learning Needs

**INITIAL DISCUSSION WORKSHEET**

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Questions can be directed to

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*This Survey is Updated Periodically.*

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