

OMMA-Goodness!

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OMMA-Goodness!

The OMMA-Goodness!
Project Management Framework

Pete Fowler Construction Services, Inc.
June 2008

A. A Party Gone Bad

- Invitations late, no list of people
- House wasn't clean
- No babysitter scheduled
- No music, porch light out
- Pizza instead of BBQ
- Ran out of ice, not enough drinks
- No card for wife; wife very sad



Outline

1. Introduction (60-90 minutes)
2. OMMA-Goodness! Components (30-60 minutes)
3. Scope of Work (60 minutes) ————— Lunch (30 minutes)
4. Budgeting Time & Costs (60 minutes)
5. Scheduling (30-60 minutes)
6. Earned Value Analysis (60 minutes)
7. Conclusion (30 minutes)

1. Introduction

- A. A Party Gone Bad
- B. Learning Objectives
- C. Who We Are / Who You Are
- D. OMMA-Goodness! Project Management Framework In-Brief
- E. Group Activity: A Super Super Bowl

A. A Party Gone Bad

Bob needs help



B. Learning Objectives (1 of 12)

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B. Learning Objectives (2 of 12)

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B. Learning Objectives (3 of 12)

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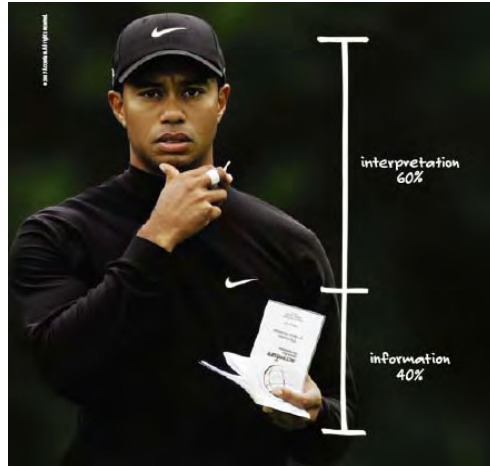
B. Learning Objectives (4 of 12)

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B. Learning Objectives (5 of 12)

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B. Learning Objectives (6 of 12)

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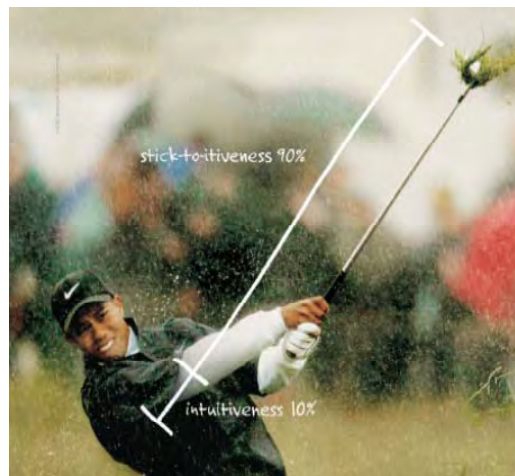
B. Learning Objectives (7 of 12)

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B. Learning Objectives (8 of 12)

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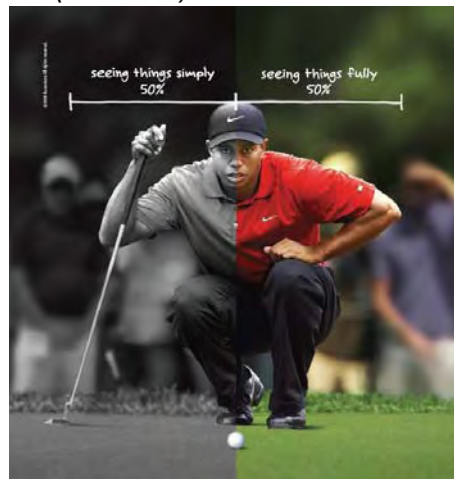
B. Learning Objectives (9 of 12)

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B. Learning Objectives (10 of 12)

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B. Learning Objectives (11 of 12)

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B. Learning Objectives (12 of 12)

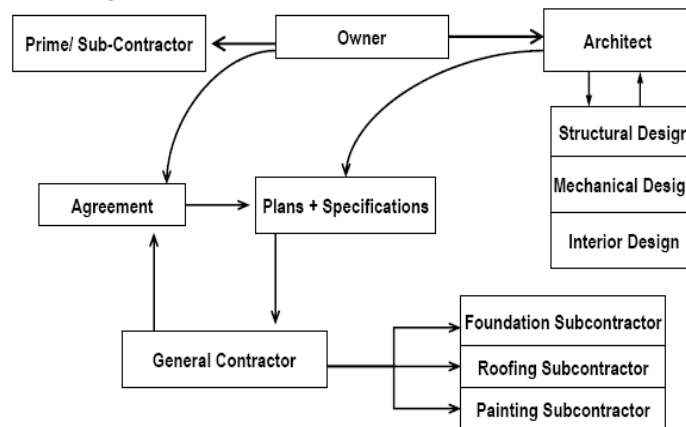
- Summarize and Simplify the Complex Science of Project Management
- Practice Planning Projects
- Establish and Use a Common Language for Planning Projects
- Learn a Step-by-Step Process for Planning
- Follow-up and Follow-Through System for Project Management

C. Who We Are: PFCS (1 of 3)

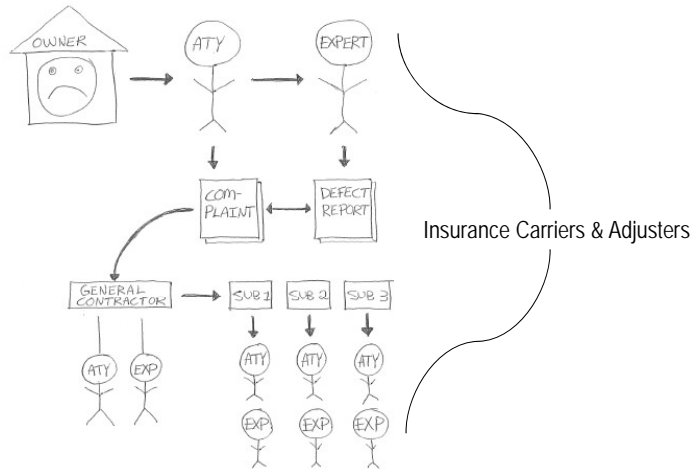
Pete Fowler Construction Services, Inc. (PFCS) is a team of building consultants with expertise in construction design, cost estimating, construction management, inspection and testing, construction claims and construction training. We combine these skills to serve as “expert construction consultants” who aid clients with all types of *building problems*: from physical building performance issues like defects or leaks, to building-process issues like scheduling or disputes. We use our unique systems to develop and deliver comprehensive solutions that steward our clients through their situation in the fastest, most cost effective way, creating actionable information that everyone can understand and use to make informed decisions.

C. Who You Are (2 of 3)

Contracting 101



C. Who You Are: (3 of 3)



D. OMMA-Goodness! PM Framework In-Brief

1. Objective
2. Method
3. Milestones & Deliverables
4. Actions
5. Scope / Work Breakdown Structure
6. Budget
7. Schedule
8. Project Planning Meetings
9. Project Status Meetings

E. Group Activity: A Super Super Bowl

Parameters

- 40 people max
- \$1,500 budget
- Already have audio / visual equipment (HDTV)
- 4 weeks to plan it



Video #1



2. OMMA-Goodness! Components

- A. Project Planning Meeting
- B. Project Management Terms
- C. OMMA-Goodness! Components
- D. Scope, Budget, Schedule – The Iron Triangle
- E. Group Activity: Plan a Simple Project

A. Project Planning Meeting

- 1. Meeting Information
- 2. Agenda
 - A. One Minute Summary & Project Information Review
 - B. Preliminary Project Plan Review
 - C. Review Known Scope, Budget, & Schedule
 - D. Review Method and Select from Menu of Milestones / Deliverables
 - E. Brainstorming / Problem Solving / Team Consulting
 - F. Update Actions
 - G. Arrange for First Project Status Meeting
- 3. Minutes
- 4. Actions

B. Project Management Terms (1 of 4)

1. Project: A temporary endeavor, that includes a beginning and an end, to create a product or service.
2. Project Management: The discipline of organizing and managing resources to deliver a defined outcome (Objective / Scope), within the constraints of the Budget and Schedule.
3. Project Manager (or Coordinator): A PM (or PC) is a professional responsible for planning, budgeting, scheduling and managing all project resources, including personnel, to deliver the project Objective; one who executes and follows-up on the Project Plan and reports Project Status.
4. Project Plan: A document that defines the project Objective, Method, Milestones, and Actions; contains a list of documents that define 100% of the Scope, Budget and Schedule.

B. Project Management Terms (2 of 4)

5. Scope: The Scope of Work is the sum total (100%) of all a project's products and their requirements or features, including all labor, materials and equipment required to complete it; a Scope document is the written representation (100%-summary) of the scope, often best depicted in a Work Break-Down Structure.
6. Budget: An itemized list of expected costs or available funds for a project or specified Scope, often based on the Work Break-Down Structure. A control mechanism to compare to actual expenses.
7. Schedule: A list or graphic of activities and associated dates, often based on a Work Break-Down Structure; may include who is responsible and how activities relate to each other. Common forms are the Bar (Gantt) Chart or Critical Path Method.

B. Project Management Terms (3 of 4)

8. Objective: A concisely written goal of specific, measurable outcomes including a 100%-summary of the Scope, Budget and Schedule.
9. Milestone: An event that marks the completion of a Deliverable, a Hold-Point on a schedule, or a flag in the Project Plan to highlight completed work; often used to ensure project progress.
10. Deliverable: A measurable, tangible item produced during project execution. Some are external and subject to approval, but some are internal only.
11. Action: A discrete, specific, measurable task, often performed by an individual, usually between 1/10-hour and 8-hours and rarely more than 80-hours

B. Project Management Terms (4 of 4)

12. Hold-Point: Milestone or critical stage in a project for verifying conformance with plan or quality standards.
13. Problem-Solving: A learning situation involving more than one alternative from which a selection is made in order to attain a specific goal (Objective); usually to move the situation from where it is to the best available alternative. One METHOD: (1.) Define the Problem (2.) Identify Options (3.) Identify the Best Solution (4.) Plan How to Achieve the Best Solution (5.) Evaluate Results.

C. OMMA-Goodness! Components (1 of 4)

14. One Minute Summary: An A to Z, 100%-summary "restatement of the obvious" to describe "who, what, when, where, why, how and how much" (7-W's), in 250 words or less to orient everyone to the big-picture before emersion into the details.
15. OMMA-Goodness!™ Project Planning Form: Planning form with sections for writing the Objective, Method, Milestones & Deliverables, and Actions for a project. For use in Project Planning, Project Planning Meetings and Project Status Meetings.
16. Method: A problem-solving framework or check-list that we apply the specific facts of our project to, as an aid in Project Planning. Some Methods have a check-list or "Menu of Deliverables". EXAMPLES: Scientific Method, AA's 12 Steps, Deming's 14-Points, PMI's 9 Categories and even the 5-W's.

C. OMMA-Goodness! Components (2 of 4)

17. Menu of Deliverables (or Milestones): A list of common Deliverables (or Milestones) associated with a specific problem-solving method or project type, used as a check-list during project planning.
18. Project Planning Meeting: A meeting to perform a structured Problem-Solving session. AGENDA: 1. One Minute Summary, 2. Plan Review, 3. Review Scope, Budget & Schedule, 4. Method and Menu, 5. Brainstorming and Update Plan, 6. Update Actions, 7. Arrange Status Meeting. PM (or PC) deliver complete Project Plan following meeting.

C. OMMA-Goodness! Components (3 of 4)

19. Work Break-Down Structure (WBS): A project management technique for defining and organizing the total Scope using a hierarchical tree structure. The first two levels (the root node and Level 2) define a set of planned outcomes that collectively and exclusively represent a 100%-summary of the project Scope. At each subsequent level, the children of a parent node collectively and exclusively represent 100% of the scope of their parent node.
20. Earned Value Analysis (EVA): Technique for measuring progress which combines measurement of actual performance of Scope, Schedule, and Budget, organized using a Work Break-Down Structure, and compares them to plan in an integrated methodology.

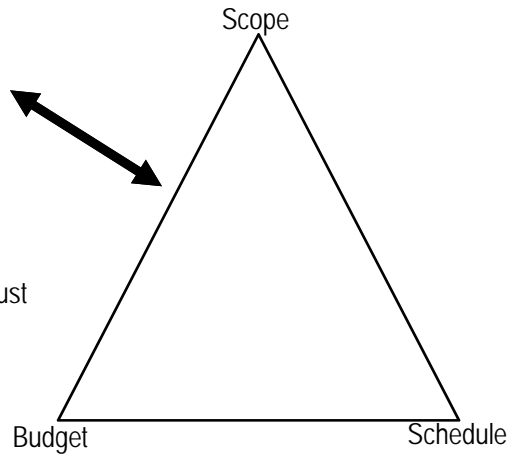
C. OMMA-Goodness! Components (4 of 4)

21. Project Status Meeting: A meeting for a structured review of project progress compared to plan. AGENDA: 1. One Minute Summary, 2. Plan Review, 3. Review Scope, Budget & Schedule, 4. Old Business, 5. Method and Menu, 5. Performance Analysis, 6. New Business, 7. Brainstorming and Update Plan, 7. Update Actions, 8. Arrange Next Meeting. PM (or PC) deliver complete Project Plan following meeting.
22. Brainstorming: An activity used to generate many creative ideas that have no right or wrong answers and are accepted without criticism.

D. Scope, Budget, Schedule – The Iron Triangle



The WBS is the *CORE* and the Scope, Budget, and Schedule must always refer back to the WBS



E. Group Activity: Plan a Simple Project (1 of 2)

- | | |
|--|--|
| 1. Wedding | 1. Wedding |
| 2. Party | 2. Party |
| 3. Life Planning | 3. Life Planning |
| 4. Big Vacation | 4. Big Vacation |
| 5. New Product Deployment | 5. New Product Deployment |
| 6. Writing a Book | 6. Writing a Book |
| 7. Develop Training Program | 7. Develop Training Program |
| 8. Construction Cost Estimate | 8. Construction Cost Estimate |
| 9. Building Failure Investigation | 9. Building Failure Investigation |
| 10. Construction Defect Claim Analysis | 10. Construction Defect Claim Analysis |
| 11. Legal Case | 11. Legal Case |
| 12. Building Design | 12. Building Design |
| 13. Insurance Claim | 13. Insurance Claim |
| 14. Opening a Restaurant | 14. Opening a Restaurant |

E. Group Activity: Plan a Simple Project (2 of 2)

Project Planning

1. Method
2. Milestones / Deliverables
3. Actions
4. Project Planning Meeting
5. Scope
6. Budget
7. Schedule

Video #2



3. Scope Of Work

- A. Contracts: What's Being Bought & Sold?
- B. Work Breakdown Structure
- C. One Minute Summary
- D. Request For Proposal
- E. Case Study #3: Contracting 101

A. Contracts: What's Being Bought & Sold?

- 1. Scope
- 2. Budget
- 3. Schedule
- 4. Allowances
- 5. Inclusions & Exclusions
- 6. Change Orders
- 7. Payment Milestones or Schedule of Values
- 8. Handling Disputes
- 9. Insurance
- 10. General Conditions

B. Work Breakdown Structure (1 of 5)

ID	Task Name	Duration	Start	Finish	Predecessors	Task Owner	Secondary Task Owner
1	RHE 3 Network Follow	32 days F	Fri 4/23/04	Mon 5/3/04			
2	Obtain Project Service Agmt	1 day	Fri 4/23/04	Fri 4/23/04			
3	Obtain Project Service Agmt	2 day	Fri 4/23/04	Fri 4/23/04			
4	Identify list of customers for RHE 3 release of RHE 3	7 day	Fri 4/23/04	Fri 4/23/04			
5	Obtain RHE 3 AS CD set	7 day	Fri 4/23/04	Fri 4/23/04			
6	Obtain RHE 3 VLS CD set	1.25 days F	Fri 4/23/04	Mon 4/26/04			
7	Produce and distribute RHE 3 CD for customers	3.67 days F	Mon 4/26/04	Thu 4/29/04 1.8			
8	Coordinate with RHE 3 headquarters update	0 days	Fri 4/23/04	Fri 4/23/04			
9	Identify list of early adopters	2.83 days F	Fri 4/23/04	Mon 4/26/04			
10	Obtain appropriate server OS	1 day F	Fri 4/23/04	Fri 4/23/04			
11	Obtain server	10.83 days F	Fri 4/23/04	Fri 5/7/04			
12	Install OS on server	5.83 days F	Fri 4/23/04	Tue 5/1/04 1.1		Dev	
13	Install Project Service Agmt on server	2.33 days F	Tue 5/1/04	Thu 5/1/04 1.2		Dev	
14	Activate connection to RHE 3	1.25 days F	Thu 5/1/04	Mon 5/1/04 1.3		Dev	
15	Obtain and test front end file endpoint distribution	3.17 days F	Fri 4/23/04	Wed 4/29/04		DB	Marketing
16	Test front end service (Rhe 3 test RHE 3 early adopter's network)	5.00 days F	Mon 5/1/04	Mon 5/24/04 1.4		DB	Marketing
17	Help Desk Debug: Find RHE 3 Network Testing	1.5 days	Mon 5/1/04	Mon 5/1/04 1.4		DB	
18	Identify RHE 3 and user RHE 3 distribution	5 days	Tue 5/1/04	Mon 5/24/04 1.5 F		Marketing	
19	Help Desk Test these RHE 3	10 days	Tue 5/2/04	Mon 5/1/04 1.6		DB	
20	Produce RHE 3 PFD	2.17 days F	Tue 5/2/04	Thu 5/2/04 1.5.5		Marketing	
21	Produce release announcement	2.17 days F	Tue 5/2/04	Thu 5/2/04 1.6		Marketing	
22	Go live with RHE 3	0 days	Mon 5/1/04	Mon 5/1/04 20.21.19		DB	
23	Go live with RHE 3 PFD	0 days	Mon 5/1/04	Mon 5/1/04 20.21.22.19		Marketing	
24							
25	Linux Support	31.3 days F	Fri 4/23/04	Wed 4/30/04			
26	Put a copy of Acrobat distribution in software folder for pickup	1.33 days F	Fri 4/23/04	Mon 4/26/04			
27	Change download page to point to our copy of Acrobat distribution	1.33 days F	Mon 4/26/04	Tue 4/27/04 20			
28	Support for existing software with RHE 3	31.3 days F	Fri 4/23/04	Wed 4/30/04			
29	Identify scope of work for RHE 3 go-live with supported software	2 days F	Fri 4/23/04	Mon 4/26/04		DB	
30	Do test install of RHE 3 AS and VLS to identify issues	5.17 days F	Mon 4/26/04	Fri 5/7/04 5.2		Marketing	
31	Do training of new front-end support	2.17 days F	Fri 5/7/04	Tue 5/1/04 29.34		DB	
32	Close open issues with front-end support	8.67 days F	Fri 4/23/04	Thu 4/29/04		DB	Marketing
33	Identify files and user documentation for using RHE 3	1.5 days F	Fri 5/7/04	Fri 5/28/04 30		Marketing	
34	Write doc that covers VLS vs AS	2.33 days F	Fri 5/7/04	Tue 5/1/04 30		Marketing	
35	Revised Linux Support page	4.83 days F	Tue 5/1/04	Tue 5/1/04 34.21.22.23		Marketing	
36	Write RHE 3 PFD	2.17 days F	Tue 5/1/04	Thu 5/2/04 34.21.22.23		Marketing	
37	Produce RHE 3 Release Announcement	2.17 days F	Tue 5/1/04	Thu 5/2/04 34.21.22.23		Marketing	
38	Go live with RHE 3 for publishing PFD	1 day F	Tue 5/1/04	Wed 5/1/04 36.21.22		Marketing	

B. Work Breakdown Structure (2 of 5)

1. A WBS is a results-oriented family tree that captures all the work of a project in an organized way.
2. It defines a set of *planned outcomes* that collectively and exclusively represent 100% of the project scope and captures all deliverables – internal, external, interim – in terms of the work to be completed, including project management.
3. Large, complex projects are organized and comprehended by breaking them into progressively smaller pieces until they are a collection of defined "work packages" that may include a number of tasks. (A \$1,000,000,000 project is simply a lot of \$50,000 projects joined together.)

B. Work Breakdown Structure (3 of 5)

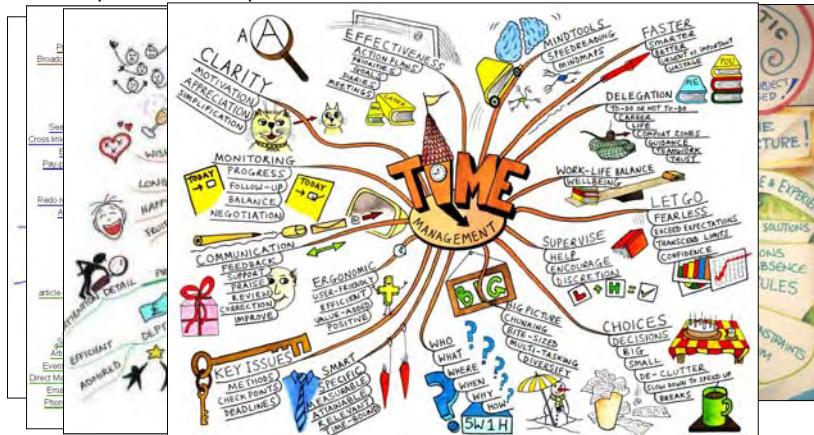
4. In planning a project, it is normal to find oneself momentarily overwhelmed and confused, when one begins to grasp the details and scope of even a modest size project.
5. This results from one person trying to understand the details of work that will be performed by a number of people over a period of time. The way to get beyond being overwhelmed and confused is to break the project into pieces, organize the pieces in a logical way using a WBS, and then get help from the rest of your project team.
6. The psychologists say our brains can normally comprehend around 7-9 items simultaneously. A project with thousands or even dozens of tasks goes way over our ability to grasp all at once.

B. Work Breakdown Structure (4 of 5)

7. The solution is to divide and conquer. The WBS helps break thousands of tasks into chunks that we can understand and assimilate.
8. Preparing and understanding a WBS for your project is a big step towards managing and mastering its inherent complexity.
9. The WBS is commonly used at the beginning of a project for defining project scope, organizing Gantt schedules and estimating costs. It lives on, throughout the project, in the project schedule and often is the main path for reporting project costs.
10. On larger projects, the WBS may be used throughout the project to identify and track work packages, to organize data for Earned Value Analysis (EVA) reporting, for tracking deliverables, etc.

B. Work Breakdown Structure (5 of 5)

Other Examples - Mindmaps



C. One Minute Summary (1 of 2)

1. It is critical that we be able to tell the story of our projects.
2. This requires mastery of what has happened and what is happening.
3. When we demonstrate mastery, we are serving our clients well.
4. Often, a lack of "big picture" understanding can cause a project to run into problems.
5. About 250 words: Big Picture, Client's Role, Why are we here, Your role, Actions
6. Answers Who, What, When, Where, Why, How, How Much

C. One Minute Summary *(2 of 2)*

7. A to Z review of the project from beginning to end, usually 5 to 15 key points.
8. At a glance anyone can understand the "forest" before talking about "trees".
9. Think of it like a "home page" where we always begin project discussions.
10. Often a "restatement of the obvious"; but not always. Avoids disconnects.

D. Request For Proposal

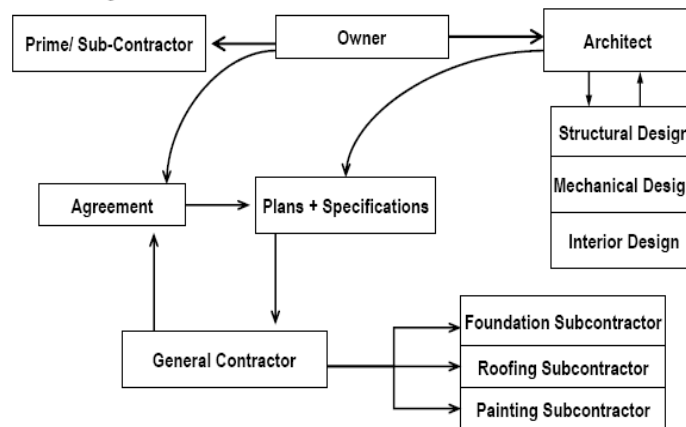
1. Cover Letter
2. Contact Information
3. Qualifications
4. General Sequence of Construction
5. Scope of Work
6. Budget
7. Schedule of Values (AIA Application for Payment)

D. Request For Proposal

- 8. Schedule of Activities
- 9. Contract
- 10. Hold Points
- 11. Plans or Drawings
- 12. Method of Repair (if applicable)
- 13. Representative Photographs

E. Case Study #3: Contracting 101 (1 of 4)

Contracting 101



E. Case Study #3: Contracting 101 (2 of 4)

1. Owner wants a project, like buying a product, except in construction it's not built yet.
2. Owner goes to an Architect to translate his/her desires into a set of documents.
3. Architect engages Specialty (Sub) Designers (engineers) to place details into plans
4. The plans and specifications detail what's being bought; via a General Contractor (GC)
5. Plans and specifications are sent to qualified and interested GCs who submit proposals to Owner.

E. Case Study #3: Contracting 101 (3 of 4)

6. Owner chooses a GC and enters into a contract or agreement
7. Contract promises that GC will build to plan and Owner will pay
8. Contract contains Scope of Work, Inclusions/exclusions, allowances, dealing with Change Orders, and Payment Milestones or a Schedule of Values.
9. GCs usually hire Subcontractors, who are specialists in their respective trades, to help deliver what has been promised in the Agreement.
10. There is nothing in this scheme which prohibits the Owner from hiring Prime Contractors (Specialty / Trade / Subcontractor) directly for work that is not in the Scope of Work in the Agreement with the GC.