



A GUIDE TO PROJECT SUCCESS

PROJECT MANAGEMENT FOR DIVERSITY & INCLUSION LEADERS

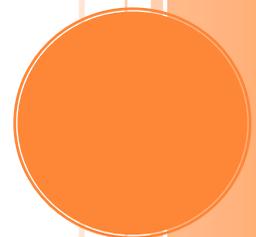
A GUIDE TO PROJECT SUCCESS

This is an introductory overview about project management, it's benefits and best practices that will influence project outcome for greater successes.

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EXECUTIVE SUMMARY

In the world of Diversity and Inclusion, project management has become a coveted skill that is essential for D&I practitioners to have to successfully deliver projects on their plates. Oftentimes, focus is put on having human resources capabilities across the board and less emphasis on acquiring project management acumen. The result is inadequately documented requirements that lead to inaccurate estimates for budgeting.

Although we are starting to see the Diversity & Inclusion function take note (via an uptick in targeted role positions for diversity and inclusion program and project managers) of the effectiveness of Project Management, it still has a long way to go to be considered a foundational skill in the Diversity & Inclusion function. In the latest Pulse of the Profession® Project Management survey with almost 2500 project managers and 192 senior executives and 300 other project related stakeholders, it was found that organizations with a culture that embraces project management reported more than 70% of their projects met original goals and business intent.”¹

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¹ 2016 Pulse of the Profession Project Management Survey.

<http://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2016.pdf>

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PROJECT MANAGEMENT DEFINED

According to the Project Management Institute, a project is defined as a temporary endeavor undertaken to create a unique product, service or result.

Some examples of projects that diversity and inclusion teams undertake may include:

- Benchmarking survey for Diversity Inc, Working Mother, etc.
- Deployment of Multicultural Calendar
- Diversity and Inclusion Website
- Cultural Events
- Community Outreach (walks, fundraisers, etc.)
- Career Fair
- Updating Human Resource System to include Diversity Data
- Other

DIVERSITY & INCLUSION CHALLENGE

Oftentimes Diversity and Inclusion teams are very small and sometimes a party of one. That means there isn't ample time to focus on project delivery. In addition, supplementary resources via Employee Resource Groups (ERG) have a makeup of volunteers who are balancing their day to day work, the ERG work, and have not been trained in what it takes to successfully deliver projects. As a result, teams are doing the best they can. This in turn means, a marked difference would be seen leveraging project management.

PROJECT MANAGEMENT PHASES



According to the Project Management Institute, the following are standard phases for Project Management.

1. Initiation
2. Planning
3. Execution
4. Monitoring and Controlling
5. Closing

In the **Initiation** Phase, we find that's where the work gets done to get projects started. This is also the phase that the Project Manager becomes empowered through the Sponsor or other Leadership or Project Management Office function responsible for assigning the Project. The Project Manager is ultimately responsible for the outcome of the project. www.pmi.org offers valuable templates that can be leveraged. For example, a project charter template would be a useful tool to outline the project and leverage as a tool for the project manager to gain authority.

In the **Planning** Phase, work is done by the project team to ensure requirements are fully understood and subsequently estimates for schedule and costs are validated. There are many ways to undergo estimating for projects. One valuable means is to leverage experts (i.e. those who've done the work before) and also lean on lessons learned from previous projects. Another way is to use the project team to brainstorm for solutions.

In the **Execution** Phase, the team is executing the work outlined in the planning phase. This is what we said we were going to do and this is what we are now on the hook to do. Think Nike Mantra and *Just Do It!*

In **Monitoring and Controlling Phase**, this is where the Project Manager monitors and controls the outcome of the project. The Project Manager is responsible for key relationships vital to the project success. That means, ensuring your Project Sponsor understands how the project is doing. As the Project Manager, it is your responsibility to nurture the relationship and know whether we're on time and under budget is acceptable status for your sponsor. It is vital to be transparent when you are experiencing difficulty. Know your culture and prepare yourself on how you will deliver that message. It can be a difficult thing to do but better than saying your project has failed in the long run because you were afraid to have such conversations. A valuable artifact in this phase is the status report. Project Managers may choose to do a weekly status report to track their project. A means of gathering information could be via a team meeting or by having one on one conversations with

In **Closing Phase**, this is where all the loose ends of a project are tied up. Any online and offline documents that need to be completed should be done in this phase. An example of this would be investing the time to document lessons learned for the project. Ask yourself and the team, what went well, what could have been improved upon, and what advice would you recommend for next time. Lessons learned is a viable tool that benefits everyone. Strive to be authentic and encouraging in unearthing key themes that will lay the groundwork for future success.

BEST PRACTICES FOR PROJECT SUCCESS

The following are six best practices for delivering successful projects:

- **Manage to the Triple Constraints** –The triple constraints for each project, according to Project Management Institute, are time (project schedule), cost (project budget) and scope. It is the Project Manager's responsibility to ensure balance between these three constraints. For example, if the scope of a project increases, inevitably the time and cost will also increase. If not handled masterfully, the project's success is jeopardized.
- **Communicate Effectively** – It is key to over communicate in the world of projects. Much confusion could be eliminated simply by planning for communications. Why not create a communications management plan to

document how you plan to communicate during the course of the project? Aligned with a stakeholder management plan, you can target communications for the project stakeholders. Incidentally, a stakeholder is defined as anyone who is impacted by the project you are delivering. Examples of stakeholders would be, the project manager, the project team, the project sponsor, and the audience/community who your project is being delivered to. It is pretty straightforward to create an Excel Spreadsheet with a few headings in your Communications Plan. Figure 1 demonstrates a sample plan.

PROJECT COMMUNICATIONS PLAN					
#	STAKEHOLDER	ROLE	TARGETED COMMUNICATIONS	DELIVERY MODE	FREQUENCY
1	Project Sponsor's Name	Project Sponsor	Status Report	Email	Weekly
2	Project Steering Committee (Cross Functional Executive Team)	Project Oversight	Steering Committee Meetings	In Person	Monthly

Figure 1 – Sample Communications Plan

- Live by the 5 Ps – Ever heard the phrase, proper planning prevents poor performance. That is key in project management. Of all the phases defined, invest the bulk of your time on planning. Be sure to peel back the onion on the project requirements to ensure the project manager and team fully understand what's being asked of them. What is your customer essentially wanting as an end result?
- Gain Authority – The Project Manager often doesn't have responsibility over the resources being leveraged for their projects. There is oftentimes a separate line manager to be dealt with (even in the case of volunteers).

Using the Project Sponsor, the Project Manager gains proper credibility (authority) to leverage to successfully deliver their projects. A Project Sponsor is usually a Senior Leader assigned to ensure project is successfully delivered. If one is not assigned, the Project Manager can review Stakeholders and approach the best candidate. Of course, it is preferable that this is managed through a project management office or senior teams responsible for a project but in the event, this is not the case, the project manager should not feel their hands are tied. For it is the Project Manager who is ultimately responsible for the outcome of the project be it success or failure.

- Know thy Stakeholders – Spend the time with your team outlining who all the project stakeholders are. Leverage tools and resources provided by the project Management Institute. A valuable tool to use would be the stakeholder map. It is a map where you graphically plot each stakeholder based on the power and interest in the project. The key to this process is really understanding who you are dealing with. Know thy Champions/Allies and Know thy Enemies/Challengers. If you know these key people, you can plot how you need to leverage them during your project. For example, if you have someone challenging you every step of the way in your project, it would be good to know who their influencer is and leverage that influencer to help you communicate effectively.

- Celebrate Our Successes – Kool and the Gang said it best. “Celebration time, come on”. Celebrating successes for your project is crucial. It is not enough to celebrate at the end of the project.



Image Source: freeimages.com

As Project Manager, you can use celebrations as a way to motivate your team. Do not only think of celebrations as a monetary expense. You can do zero or low cost celebrations. Remember those allies, what if they sponsored a project team lunch for you. Be creative. Perhaps you can partner with your human resources team to provide time off for those stellar team members. Another potential idea would be lunch with the CEO of your company. Those are conversations and not necessarily dollar outlays from your project budget and would certainly go a long way to motivating your team.

The aforementioned overview and best practices should provide a high-level overview of how valuable it is to leverage project management in the diversity and inclusion space. The bottom line is that an investment in project management resources can provide tools and techniques to be more efficient and effective with the projects undertaken.

ABOUT THE COMPANY



Simone Morris is the President of Simone Morris Enterprises, LLC. Her company offers diversity and inclusion consulting, career management coaching and speaking services. Ms. Morris spent two decades in Corporate America. She has extensive leadership experience and holds a Masters of Business Administration degree from the University of Connecticut. She also holds the Associate Certified Coach credential from the International Coaching Federation as well as the certified Project Management Professional distinction from the Project Management Institute. She is an adjunct faculty member for the American Management Association. Ms. Morris has also been recognized by Diversity Best Practices and Diversity MBA for her exceptional leadership skills as a Diversity Practitioner.

CONTACT INFORMATION

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