P3.express Instructor-Led Workshops

Trainers' Guide

This document was generated automatically based on version 1 (beta), 2021-12-08 of the guide.
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Co-funded by the
Erasmus+ Programme
of the European Union

Introduction

This document is only for trainers who give training workshops for P3.express. If you're a learner interested in self-study, use the manual and the eLearning course instead.

The purpose and nature of this guide

This is a complete, detailed guide that is continuously tested and improved so that you don't have to reinvent the wheel. Its goal is to help you deliver successful training workshops for P3.express.

Trainers' options

Following this program is not mandatory for P3.express trainers, but it's highly recommended. You have the choice to use it in full, in part, or not at all.

Alternatively, if you prefer to deliver the content using slides instead of in a hands-on workshop, you can use the standard slide deck.

Contributions

If, while using this program, you come up with ideas for improving it based on your hands-on experience, let us know via info@omimo.org so that we can adjust the guide and make your input available to everyone.

Format of the workshops

P3.express is focused on being practical and easy to use, and this should be reflected in its training programs as well. That's why we prefer to have **interactive workshops** rather than **lectures**.

Your primary role would be that of a facilitator who helps participants find their way, and one who helps the information emerge organically, rather than being a lecturer. This doesn't mean that there's something fundamentally wrong with lectures – just that that's not the best method of training for P3.express.

The workshops can be face-to-face or online.

Duration of the workshop

You need 13 to 16 hours for a workshop based on this guide.

The approximate duration of each unit is mentioned in the guide, and it’s a good idea to continuously compare the actual time spent with the planned duration to see whether you need to slow down or speed up the remainder.

You should divide the content among sessions in such a way that sections are not split across into two sessions if possible. Don’t forget to add enough short breaks during the sessions.

Room setup for face-to-face workshops

For face-to-face workshops, it’s best to move the desks to the sides and have an open room. Participants can walk around, talk to each other, or sit down and think individually as they please.

Ask the participants to wear name tags, so that you can remember their names and use them when necessary.

Use boards, flip charts, sticky notes, and similar tools to capture their ideas. It’s best to use physical tools to add more physical activity and make the workshop more active. Attach a large print of the P3.express diagram on a wall, and write the activity names on it as you progress through the workshop.

Ask the participants to silence their phones, laptops, and tablets and put them in their bags.

Room setup for online workshops

We use breakout rooms for group activities. Any video conferencing platform that supports breakout rooms should work fine for online workshops; e.g., Jitsi, BigBlueButton, Adobe Connect, WebEx, Google Meet, Microsoft Teams, and Zoom.

Let the participants know beforehand that their video should be on all the time. It helps make the session more effective. Check to make sure that every participant has entered their name on the platform, so that you and others can easily address them.

Use a mind mapping application to collect and organize ideas. Share your screen in the video conferencing application and let everyone see the mind map at all times.

Slides

We only use a few slides in online workshops, and share the mind map the rest of the time. In face-to-face workshops, you can use a few slides, but you can also (preferably) manage without them.

Don’t be tempted to add more slides, as they limit the interactivity and effectiveness of the program.

Pre-workshop work

Participants don’t need to do anything before the workshop. The whole of the training happens during the workshop, under your supervision. It works even better if the participants don’t have any knowledge of P3.express at all when starting the workshop.

Additional resources for the participants

People learn, understand, and remember much better when they have to work something out rather than getting an instant result. Therefore, it’s best if they don’t use the manual or any other resource during the workshop.

Number of participants

The optimum number of participants is 6 to 12 people. Having more people in the workshop will limit its interactive and engaging nature.

The scenario

The whole workshop is based on a scenario that is explained in this guide. We’ve selected a project that is not too big and complicated to become overwhelming, but not too small and simple to make it difficult to carry out activities. The subject of the project is also relatively easy to understand for people from any background.

While the scenario should work well for everyone, if you have in-house programs where all participants come from the same company and are used to working on similar projects, you have the option to take one of their own projects as the scenario. It makes the workshop more interesting for the participants, but it also adds more risks for you as you have to be prepared to extract the necessary information in real time, and also to make sure that they don't focus too much on the technical aspects of the project.

Pre-workshop communications

When someone registers for the workshop, send them an email to explain the following:

- Format and objective of the course
- Practical information
- Ground rules

If the date/time or existence of the workshop is not yet finalized, wait until it's finalized and then send the email.

It's a good idea to send them a calendar invite as well, especially if you have participants from different timezones and suspect there may be mistakes made in converting timezones. You can add a copy of the pre-workshop email to the notes of the calendar invite as well, to make sure they are always accessible.

Format and objective of the workshop

Some people may attend your workshop because their company has arranged it, and they may not know what to expect. Even individuals who select your course and pay for it themselves may not pay enough attention to the specifications. To avoid surprises, tell them about the format and objective of the workshop; for example:

> This program is an interactive workshop where you and your peers will work together on a scenario and learn through that experience. We won't use lectures, slides, handouts, etc.
>
> The goal of this workshop is to help you understand how you can set up a minimalist project management system based on P3.express.

It’s a good idea to allow potential participants to cancel their order and get a full refund before the workshop if they change their mind. If you’re going to rely on their registration for finalizing the course, give them a clear deadline for cancellation, and a clear cancellation policy.

Practical information

Tell them all the practical information they may need about the workshop, such as the following:

- **Trainer**: {name and contact information}
- **Date and time**: {for all sessions, including the timezone when needed}
- **Location**: {including information about parking places and public transport for face-to-face workshops or supported devices for online ones}
- **Catering**: {for face-to-face workshops only!}
- **Lunch break time**: {for online workshops, so that people can be prepared}
- **Pre-workshop work**: Nothing!
- **What to bring**: Nothing!

The goal is to leave no potential question unanswered. When you receive questions after sending the email, check to see whether it’s something you need to cover in future emails.

Ground rules

Edit the following ground rules to suit your style, and explain them at the beginning:

- Be on time.
- Keep an open mind.
- Participate in the discussions and encourage others to do the same.
- Be brief when sharing your opinion (maximum 40 seconds at a time).
- Forget about emails and messages from work and friends.
- Be curious – listen actively and try to understand others.
- Challenge the idea, not the person.
- Avoid side conversations and focus on the main topic.
- Don’t worry about nitty-gritty details – focus on the strategic level instead.

Additional ground rules for face-to-face workshops:

- Wear your name tag all the time.
- Silence your phone, laptop, and tablet, and leave them in your bag.

Additional ground rules for online workshops:

- Make sure your profile shows your full name.
- Make sure your video is on all the time, except during the breaks.
- Use headphones instead of speakers to minimize audio feedback.
- Stay in a quiet room and use a quality microphone.
- Mute your microphone when not speaking.
- Leave your phone outside the room.

Let them know that you will ask them for ideas to improve the ground rules at the end of the workshop. This has two advantages: first, it's a good source of great ideas (don't forget to tell us about those); and secondly, it helps increase their buy-in.

The reality is that some people won't read the email carefully, and that's why you need to review the ground rules at the beginning of the workshop as well.

Workshop preparation

Make sure everything is prepared for the workshop and that participants will have a smooth experience. For example:

- Face-to-face workshops
  - Is the size and layout of the room appropriate for the workshop?
  - Is the room reserved and accessible for the workshop?
  - Are additional arrangements (e.g., for using the parking spaces) done?
  - Are there enough boards, markers, flip charts, papers, etc. in the room?
  - Are drinks, lunch, and other catering arrangements made?
- Online workshops
  - Is the video conferencing platform available and ready for use?
  - Do you have all the necessary tools (e.g., mind mapping application)?
  - Are the sound and lighting okay in the room you'll be using for the

session?
    - Do your webcam, headphones, and microphone all work fine?
    - Do you have a reliable and fast Internet connection?

Remember that you're accountable for the smooth delivery of the workshop. If someone else is responsible for those arrangements, you still have to supervise or double-check to make sure everything is okay.

Post-workshop evaluation

We recommend two rounds of post-workshop evaluation:

1. Immediately after the workshop, to evaluate their satisfaction with the workshop. You can ask them to fill in the form at the end of the workshop, or email the form the next day. The first option usually draws more participants, but the second one has more reliable results.
2. After 6 months, to evaluate the effectiveness of what they've learned.

If you are an accredited trainer, or willing to become one, the evaluation must be done by P3.express, because learner satisfaction is a criterion in trainer accreditation. The result of the evaluation will be stored in our system and you will have access to it as well.

Note that the satisfaction of the learners is NOT the ultimate goal – the ultimate goal is having effective training that can have a positive impact on their lives. There is a correlation between these two, and that's why learner satisfaction is used as an approximate proxy for the effectiveness of the program, although this has to be done with caution.

Scenario

Artophile is an architects' firm in **Artopolis**. Artophile is going to initiate a new project codenamed **ArtoLibre@Artophile**.

ArtoLibre@Artophile is aligned with a larger initiative in Artopolis called **ArtoLibre**. The ArtoLibre initiative is designed to replace most proprietary software in the public sector with **libre** alternatives.

What is libre software?

Libre software, sometimes called free software (free as in free speech, not as in free beer), open source, or FLOSS (Free/Libre, Open Source Software) is software that respects the **freedom** of the user by providing its source code and allowing investigations, modifications, and distributions. The source code must be available because when it is, experts can investigate the software and make sure that it doesn't do anything undesirable.

Being libre increases the potential for higher **security** and **privacy** on the one hand, and on the other hand, increases **pluralism** by avoiding lock-ins. Furthermore, libre software is usually more efficient, so that it's not necessary to frequently replace old hardware, which makes it more **sustainable** and **environmentally friendly**.

Libre software is usually less expensive, but lowering costs is not a goal in the ArtoLibre initiative, and any savings made as a result of this initiative will be donated to libre projects to support their further developments.

What is ArtoLibre?

The government has planned a five-wave approach for ArtoLibre:

- **Wave 1**: Replacing the email clients, instant messaging applications, and cloud storage systems
- **Wave 2**: Replacing the office suite applications
- **Wave 3**: Replacing the remaining general applications
- **Wave 4**: Replacing the remaining specialist applications
- **Wave 5**: Replacing the operating system

Each wave takes 3 to 6 months to implement and is followed by training. Users

must have at least 6 months between the release of any two waves, in order to get used to the change.

The libre applications that replace proprietary ones are expected to be **better** than them or at least on the same level (whatever “better” means for the end users) – so they’re an upgrade rather than a downgrade. When options are limited, minor downgrades are acceptable, but in cases where liberation requires a major downgrade, the proprietary application can be kept. Needless to say, the proprietary applications must be cross-platform or platform-agnostic so that users can run them in a libre operating system.

What is ArtoLibre@Artophile?

The ArtoLibre initiative is limited to the public sector. Artophile, which is a private company, doesn’t have to comply with it. However, Artophile values freedom, doesn’t limit itself to specialist services, and considers itself socially responsible. As a result, Artophile has decided to take a similar initiative.

Besides taking on the general advantages of the ArtoLibre initiative, it also makes the company’s computer systems more compatible with those in the public sector, which is an advantage because there’s a lot of interaction between them.

YOU!

You are a project manager in Artophile who has been selected to manage the ArtoLibre@Artophile project. You only have experience in managing architecture/construction projects. However, you know that project management is different from the technical aspects of the project and you should be able to do a good job.

The IT department of the company can play a part in this project, but they don’t have all the expertise and external IT consultants who are also required.

Good luck!

Activity discovery

It helps the participants have a better understanding of the activities and the whole process if you let them discover the activities instead of just telling them what has to be done.

The following parts of the workshop have activity discovery:

- **Part 2**: Project initiation activities
- **Part 3**: Monthly initiation, weekly and daily management, and monthly closure activities
- **Part 4**: Project closure activities
- **Part 5**: Post-project management activities

This page explains how to discover the activities in each of those parts.

S1 - Explain the purpose

First, remind them of the purpose of the activity group:

- Face-to-face: Put a large sheet of paper on the wall, write the name of the activity group on top and the purpose below it. Later, you'll add the activities on sticky notes onto this paper.
- Online: Add two nodes below the activity group's node: one titled *purpose* and the other *activities*. Write down the purpose and leave it open for them to see.

S2 - Collect ideas

Ask them to think about the management activities they will find necessary or helpful for this group. Remind them to write down the items briefly and clearly. Tell them that they don't need to worry about adding duplicate items, but encourage them to check other participants' items because it may inspire them to come up with additional ideas. Note that this exercise is done individually, not in teams.

To capture the ideas:

- Face-to-face: Ask the participants to write down the items on sticky notes (one item per sticky note) and put them on the board. Encourage them to walk around the room and manage the notes themselves to keep them more active and energetic.

- Online: Ask the participants to write down the items in the public chat panel, each item on a separate line. At the end, copy all the ideas from the chat panel and paste them into your mind map, underneath the *Project Initiation* > *Activities* node.

Usually, 2 to 3 minutes is enough for this task, but you don't have to give them a limited time; instead, watch their interactions, and as soon as you feel that they're reaching the end, give them 30 seconds to finish up.

You can expect to receive 10 to 40 items at the end of this round.

S3 - Organize the ideas

Go through the items and organize them:

- When there are duplicates, pick one and move the rest underneath it.
  - Face-to-face: Stack the cards and put the selected item on top.
  - Online: Move the other items underneath the selected item and collapse it.
- If something doesn't belong to the current activity group, move it to the next activity group. Depending on the nature of the item, either explain why it has to be done later or simply let them know that you will discuss it later.

At this point, you will probably have 5 to 20 activities. You don't need to create a one-to-one mapping between their items and P3.express activities at the beginning – it's best to do it gradually.

S4 - Order the items

Skip ordering for the daily management activities (as they don't have an order). For the other groups, select one of the existing activity ideas that belongs to the middle of the activity group. Then, ask the participants if it's possible to do it immediately at the beginning, and if not, what has to be done before it. Track those predecessors back until you reach the first activity, and add the missing activities along the way. While doing it, adjust the order of activities on the board or mind map.

S5 - Link to P3.express

When ordering is complete, change the name of each item into the corresponding P3.express activity name.

Part 1

20 to 30 minutes

The first part of the workshop is about introductions and preparations.

Arrival

Make sure you arrive at least 20 minutes before the planned start time, and double check to make sure everything you need is available. You need to know who to call and ask for help if something is missing.

When people arrive, check to make sure they comply with the ground rules; e.g., wearing name tags for face-to-face workshops and having display names for online ones.

Start the workshop exactly on time – if you don't respect the schedule, others won't.

Introductions

Ask the participants to introduce themselves, and at the end, introduce yourself. This helps them get to know each other and also warm up. It's also a buffer for those who may arrive late.

Give participants a few main topics for their introduction; e.g.,

- What's your name?
- Where do you work and what do you do?
- What types of projects do you have in your company?
- What's the main difficulty in managing your projects?
- How did you try to cope with that difficulty?
- What project management topics have you studied before?
- Do you know any other participants in this workshop?
- What are your hobbies?

Let participants see the questions when introducing themselves:

- Face-to-face: Write the questions on the board. You can erase them when introductions are finished.
- Online: Open a "Workshop Initiation" item underneath the main mind map

element, and add “Introductions” underneath it. Add all questions underneath the “Introduction” element. When the introductions are finished, collapse the item.

When each person is done introducing themselves, it’s best to ask one or two questions for extra information or extra details. This demonstrates your interest and helps prevent the introductions from being too brief.

Grouping

Most exercises are done in fixed groups of 3 participants. If the number of participants doesn’t allow you to have 3 participants in every group, you can have one or more groups with 4 participants. Avoid appointing more than 4 people to a single group.

Groupings will be fixed during the workshop, so be careful with the way you team them up. It usually works best if you team up people who don’t know each other.

Each group plays the role of the project manager, unless otherwise stated.

Group facilitator

Explain that they should take turns in acting as the facilitator in each exercise. The facilitator doesn’t contribute to the content (unless necessary), but is focused on helping the other members focus on the purpose of the exercise and create the output within the limited time they have.

The duration set for the exercises is limited because we have many exercises in the workshop. Therefore, it’s absolutely necessary to have an active facilitator in each group who prevents members from wasting their time on unnecessary details.

Attend the group exercises and help them improve their facilitation techniques. Besides helping them have more productive exercises, it also helps them improve an essential project management technique that will be helpful to them in the future.

Ground rules

You’ve already emailed the ground rules to the participants, but some people may not have read these carefully. It’s a good time to review them here, and also explain

the rationale for each rule. Make sure they understand that the rules are designed to make the workshop as useful as possible for them rather than to limit them.

Don’t forget to mention that you’ll ask them for improvement ideas for the ground rules at the end of the workshop.

Rearranging the room (face-to-face only)

Most rooms are furnished for lectures. At this point, you and the participants can work together to rearrange the room and make it suitable for the workshop. Move the tables and chairs to the sides.

This is yet another warm-up exercise and also another opportunity for late participants to show up before the main topics start.

Take a photo of the room before changes, so that you can pull it all back at the end of the session or the workshop.

Overview of the process

Now it’s time for a short lecture!

Take about 5 minutes to show them the process diagram, and give them a quick overview of the process. Only focus on the circular nature of the process and on the activity groups without mentioning any of the activities.

Keep the process diagram visible during the workshop:

- Face-to-face: Put a large process diagram on a wall or on the screen.
- Online: Show them the diagram, and as you explain, add the name of the activity groups to your mind map. You will gradually populate them with the content that will be created during the workshop.

If participants ask questions about the process, keep the answers high-level. If a question needs more detail and is best covered later, park it as follows:

- Face-to-face: Designate a board or wall for parked questions. Write those questions on the board or write them on a sticky note and add to the wall.
- Online: Add a “Parked Questions” element underneath the root element and add the questions underneath it. Keep the element collapsed to focus on the main topic.

Remember to cover the parked questions as you proceed with the workshop, and remove each one when its concept is covered.

At this point, your mind map in an online workshop would look like this:

```
 ┌─ Workshop Initiation [+] │ │ ┌─ Project Initiation │ ├─ Monthly
Initiation │ ├─ Weekly Management ├─ Process ──┬─ Daily Management O
──┤ ├─ Monthly Closure │ ├─ Project Closure │ └─ Post-Project
Management │ ├─ Workshop Closure └─ Parked Questions [+]
```

An equivalent of this mind map in a face-to-face workshop is a number of large papers on the wall, each one titled with one of those 10 main headings. We'd rather use paper to save the content instead of writing them on a whiteboard and then erasing them – only use the whiteboard for temporary content.

Introduce the scenario

Now it's time to introduce the scenario:

- Face-to-face: Give each participant a printed version of the scenario.
- Online: Show the scenario on the screen and also post it as a file, so that they can open it on their local machine and check it whenever they want.

Make sure that the participants understand that a project manager doesn't need to be expert in the application area, and therefore, they don't have to worry if they don't have IT experience. In fact, it may be advantageous if they are not IT experts, because then they have to be focused on the management aspects. Remind the tech-savvy participants that they should not be distracted by the technical aspects but rather focus on managing this sample project. In the real world, they either have to change hats between a manager and an application area expert, or simply focus on managing the project and leave the technical aspects to other experts.

There are a few things you need to know about the scenario, and be prepared to explain to the participants if needed:

- We've used the Artopolis context, which can be helpful as your learners will take the Artophile Center eLearning course as well.
- We've used the word "libre" instead of the more common word "free", to ensure there's no misunderstanding – the English word "free" means both *libre* and *gratis*, and when used in this context, it's about being *libre*. Although most libre applications are gratis as well, being libre is the most important attribute, not being gratis. Feel free to mention that the same applies to P3.express: It's libre

(and also gratis).

- To be accurate, the ArtoLibre initiative is a program rather than a project. To keep it simple, we've just referred to it as an "initiative" – the word "initiative" can be used to refer to both projects and programs. While the ArtoLibre@Artophile initiative can be considered as a program as well, it's OK to see it as a project.
- The goal of the ArtoLibre initiative is **not** to replace **all** proprietary applications with libre alternatives, but to replace as many of them as possible without making big sacrifices. So, for example, when it comes to Wave 5, it won't use a fully libre Linux distribution, and a normal distribution that has some proprietary drivers will be fine.
- The main problem in an initiative like ArtoLibre is not technical – it's about doing it in a way that is not too distracting for the users, because they have to get used to using a different set of applications with a new user interface and work flow. That's why there are five waves: to let the users get used to it and absorb the changes.
- Such initiatives have been implemented in the real world; some of them successfully, and some of them not. There are already some public sector organizations in some countries that use libre software.
- The first 4 waves gradually replace the existing applications with libre alternatives run on the same operating system (Windows or MacOS) because most libre applications are cross-platform, and finally, the fifth wave replaces the operating system with a Linux distribution.

Let's have a look at the five waves of the ArtoLibre initiative:

- **Wave 1**: This is about replacing applications like Outlook, WhatsApp, and Google Drive with libre alternatives. This is the first wave because it's the easiest change for the users.
- **Wave 2**: Almost all organizations use an office suite such as Microsoft Office on a daily basis, which will be replaced by LibreOffice or another libre alternative. The choice of libre office suite is not significant, because they use similar file formats and their outputs will be compatible with each other; however, LibreOffice can be a good choice because it's the default office suite in most Linux distributions. All waves are followed by a training program, which is especially important for this wave because most people in the organization will be using office applications. We can assume that because of the ArtoLibre initiative, the government has prepared simple, well-structured eLearning courses that are freely available to everyone. So, the training we need to have in ArtoLibre@Artophile can be limited to awareness and support, or become

blended training.

- **Wave 3**: The previous two waves have replaced some of the key general applications. This wave will replace the remaining applications (except for those that create a major disadvantage). Note that what is a general application and what is specialist depends on the organization; e.g., most organizations may use an image editor like Photoshop every once in a while, but not professionally. For them, it would be considered a general application and targeted here, while the same application is a specialist one in a graphic design company and will be targeted in Wave 4.
- **Wave 4**: The specialist applications are those the organization uses for its core business; e.g., an image editor for a graphic design company, and a CAD and a 3D-modeling application for an architecture business. These applications warrant more attention, and we have to make sure the change doesn't create any long-term issues. However, it's natural to have short-term disruptions, and that's acceptable. As mentioned before, the goal is not to replace **every** application at any cost – if replacing a proprietary application causes too many problems, the proprietary application can be kept. Besides commercial applications, some organizations have custom applications developed for them that may not be cross-platform and can cause issues when they switch to Linux in Wave 5. These applications should be adjusted or replaced in this wave
- **Wave 5**: This is the final wave where Windows and MacOS will be replaced by a Linux distribution that is suitable for average users. We can assume that ArtoLibre has selected a distribution as the default, in which case, it would be easier to use the same in Artophile.

While explaining the scenario, make sure you're not making the Project Description elements too obvious; e.g., we've used words such as "advantage" and "disadvantage" when describing the change, instead of "benefit" and "disbenefit", so that the learners can rationalize about it instead of just copying everything from the scenario into their Project Description.

Part 2

4 to 5 hours

This part is about discovering the project initiation activities and initiating the sample project.

Common pitfalls

This topic has the tendency to become too long and to go into too much detail about planning. In this view, make sure you keep the length and amount of detail to an appropriate level and remember the following:

- Planning is only part of project management and even the best plans are ineffective when not enough attention is paid to the other project management activities.
- Insisting on a perfect plan discourages your audience from using a structured project management system. Your goal is to help them understand how to create a **good enough** plan, not a **perfect** one. They will always have the chance to improve their planning skills in the future, after they've implemented a simple, structured project management system and started benefiting from it.

Activity discovery

Start with a discovery exercise to create the list of project initiation activities, without going into too much detail about those activities.

Exercises

Now we can run the activities for our sample project:

- A01 - Appoint the sponsor (exercise)
- A02 - Appoint the project manager (exercise)
- A03 - Appoint the key team members (exercise)
- A04 - Describe the project (exercise)
- A05 - Identify and plan the deliverables (exercise)
- A06 - Identify risks and plan responses (exercise)
- A07 - Have the project initiation peer-reviewed (exercise)

- A08 - Make a go/no-go decision (exercise)
- A09 - Kick off the project (exercise)
- A10 - Conduct a focused communication (exercise)

Conclusion

Give them a quick overview of what has been done in Part 2 and remind them, once again, of the purpose of this activity group.

P2-A01 - Appoint the sponsor

15 to 20 minutes

Explain the purpose of the activity once again, and write it down on the board or the mind map. Then, ask them to work in teams and suggest one or a few candidates as the sponsor. Give them 5 minutes to finish the exercise.

The scenario doesn't mention any names or roles to avoid anchoring the participants. Artophile is a company like most other companies: They can imagine different departments and roles, and make up stories that explain how different people behave in the company, and based on that, tell you which one(s) they find suitable for the sponsor role, and defend their choice.

When the time is up, ask each facilitator to explain their team's answer in a maximum of 40 seconds. Ask others to comment, and add your own input if needed.

These are some of the common answers you may get:

- **The CEO**: It's usually not a good idea because they may not have enough time and there's a tendency for them to become the sponsor for all or many projects, which is really the same as not having a sponsor.
- **The CTO**: this can be a good or a bad choice, depending on the person, but in general, it's a little risky because the IT department is more like a supplier in this project.
- **The COO**: this can be a good choice, as this project has a lot to do with the operation of the company.
- **Other directors**: The subject of the project may not be relevant enough to them, unless the team comes up with a story that makes the person a good candidate.

- **Other managers**: Probably not a good choice because they don't have enough organizational power.

One important note here is that the organizational role is not enough to explain who's a good candidate for sponsoring the project, because the sponsor must believe in the project and be willing to champion it. That's where their imaginary stories play an important role.

P2-A02 - Appoint the project manager

5 to 10 minutes

Explain the purpose of the activity and write it down on the board or main map.

There's no real exercise for this activity – the participants will play the role of project manager. However, use this opportunity to talk a little about the common problems in this area; e.g., that project managers are sometimes appointed too late.

P2-A03 - Appoint the key team members

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map. Some people find it difficult to understand how team members can be appointed to a project that is not yet approved to be executed, so, make sure you give them sufficient explanation.

Give them 5 minutes to work in groups and come up with a list of key team members they're going to need to initiate the project. Make sure they understand that more team members will be added after initiation.

When the time is up, ask each facilitator to explain their answer in a maximum of 40 seconds. When they are all done, ask if anyone has any comments on the collected ideas, and then give your own comments.

Because this scenario is about changing the software applications in the organization, it will impact all departments. As a result, the interests and concerns of all departments must be considered (E.g., the financial department may be using an old piece of software designed for DOS that barely works in Windows, and they don't know what to do without it.)

To address this concern, the project team can simply interview all departments. However, this is risky, and the best option is to have one representative from each department as an active project team member with the power to contribute to the decisions.

Besides having team members from each department who represent the users of that department, you need to have technical expertise as well. Part of that technical expertise comes from the IT department. Nevertheless, we know from the scenario that the IT department is not expert enough in this area, and one or more external consultants are needed. It's a good idea to find and appoint at least one of those consultants at this point.

P2-A04 - Describe the project

60 to 90 minutes

Explain the purpose of the activity and write it down on the board or mind map.

Then, ask the participants to imagine that enough time has passed and the key team members are assigned to the project, and that they can now use those people's knowledge and their own facilitation techniques to create the Project Description.

To make it easier, we'll work on the 5 main topics of the Project Description separately.

1. Purpose and expected benefits

Give them 5 minutes to document the purpose and expected benefits of the project. Ask the facilitators to paste their answers in the public chat box for everyone to see.

Most of the information is already available in the scenario, and it's mainly a matter of formatting a brief explanation based on that. For example,

> The purpose of the ArtoLibre@Artophile project is to replace as many proprietary software applications as possible with libre alternatives.
>
> Expected benefits/outcomes:
>
> - More compatibility with the applications used in the public sector
> - More security and privacy

- Less software lock-in
- More environment friendly
- Less expense in the long run

To be accurate, the items above are outcomes rather than benefits, but it's fine to list outcomes instead of benefits when the benefits are not financial in nature and are hard to quantify in financial or non-financial terms. Moreover, expected benefits must be prepared in program or portfolio management layers and only mentioned in the Project Description for alignment purposes; the project team is **not** responsible for planning them.

If your learners are familiar with benefits management, you can spend two or three minutes discussing the difference between benefits and outcomes, and how these outcomes can be quantified and turned into real benefits.

There's a mention that cost reduction is a likely outcome, but not one of the reasons for running the ArtoLibre initiative. This means that it won't be listed as one of the benefits/outcomes of the ArtoLibre initiative, but remind them that we're working on the ArtoLibre@Artophile project, and there, the company may want to have cost reduction as well – it's all up to their imagination. Indeed, having layered or overlapped initiatives is common, and people tend to mix them when composing their Project Description, so it's a good exercise to see it here and think about this issue.

2. Expected cost and duration

Ask them if they have any idea about duration.

The scenario mentions that the government's proposal is to run the initiative in 5 waves, with at least 6 months between each two go-lives. So, assuming that implementation of each wave is not longer than 6 months (which is probably the case), the whole project will last about 30 months. This rough estimate is fine at this point.

Explain that in a real world project, they may or may not have a budget for the project at this point. Let's assume there's no budget yet, and leave it blank for now.

3. Requirements and quality expectations

Ask them to spend 5 minutes in their group and prepare a list of requirements and quality expectations. Tell them that this type of information usually comes from

outside the project and that their main responsibility is to collect, organize, and refine it. So, for the exercise, they need to put their user hats on (as specialists working in a company) and give their expectations.

When the time is up, ask each facilitator to explain one of their items and then go to the next team. After the first round is finished, go back and ask them to describe the second item, and so on.

The most common problem is that people tend to explain a certain product/output instead of a requirement/outcome. If there are any such items, pick one and work with the participants to see how it can be converted into an outcome-based item.

One of the items mentioned in the scenario is this:

> The libre applications that replace proprietary ones are expected to be better than them or at least on the same level (whatever “better” means for the end users) – it should be an upgrade rather than a downgrade. When options are limited, minor downgrades are acceptable, but in cases where liberation requires a major downgrade, the proprietary application can be kept.

This is a good example of a requirement/expectation, but it would be helpful to describe what “better” means in Artophile.

Other examples:

> - Our system and its content should be available from outside the company.
> - Our old content should be accessible in the new ecosystem.
> - Some of our clients will send us content with proprietary formats – we should be able to open and use it.
> - Our system should be GDPR compliant.

4. A high-level description of in-scope and out-of-scope elements

Proceed with this section by asking them questions instead of having a group exercise. Selecting and implementing the software applications is clearly part of the project. What else do we have? Does it include training? Maybe, maybe not – that depends on how the project is defined, but it’s up to them to make it clear at this point. If it’s not part of the project, it’s a good idea to document it as out-of-scope to

avoid future confusion.

Ask them whether they can come up with other things that may or may not be part of the project. Another example is conversion of the existing content – the existing content should be added to the new ecosystem (e.g., designs, emails, and letters). Should it be done as part of the project, or is it expected that the users do it themselves?

The main point is to think about the possibilities and make them clear at this point.

5. A list of stakeholders

Tell them what a stakeholder is (someone who has some type of interest in the project and has the power to impact it). Then give them 5 minutes to work in groups and prepare a list. Let them know that it's fine to use their imagination and make up stories that create new stakeholders. Also, ask them to divide the stakeholders into project team members, internal members who are not team members, and external members. This helps them identify more stakeholders.

When the time is up, ask each facilitator to present their work.

The external stakeholders can be the public sector, the existing and potential clients, the suppliers, etc.

Every person and department in the company is an important stakeholder. However, they probably won't list every single person, but create categories that cover every type of interest and potential impact; for example, architects, civil engineers, mechanical engineers, etc. However, in addition to that, some people may be listed individually because of their unique attributes; e.g., a certain manager who hates Linux and an engineer who was a contributor to an open-source project in the past.

Finally, the project team members are the sponsor, the project manager, user representatives, and IT experts (the internal ones as well as the hired consultant).

It's common for people to just list titles or roles. This may be the right way for some stakeholders (e.g., generic external stakeholders), but it shouldn't be the case if it can be avoided (e.g., project team members). So, if you see generic lists only, help them replace them with imaginary names, followed by project role and organizational role; for example: "John Doe, user representative, senior mechanical engineer"

Conclusion

So, at this point, we're done with the Product Description. Give them 10 minutes to work in groups, make final adjustments, and combine everything into a simple text document (for online workshops) or a piece of paper (for face-to-face workshops) that will be their current version of the Product Description.

When the time is up, ask them to share their work with everyone without explaining it. You don't need to give any comments at this point, unless you spot a serious mistake.

P2-A05 - Identify and plan the deliverables

60 to 90 minutes

Explain the purpose of the activity and write it down on the board or mind map.

Background information

If your participants are familiar with project management methods and techniques, you can explain that hierarchical breakdown of the deliverables is a common technique that is usually referred to as a *work breakdown structure* or a *product breakdown structure*, but since those names have created many misunderstandings through the years, P3.express has coined its own term: *Deliverables Map*.

Preparing the map

Spend a minute or two explaining how a hierarchical breakdown is done, and then ask them to take 10 minutes working in their groups and creating one. Their output can be

- face-to-face:
  - A drawing on a board, or
  - a drawing on a piece of paper, or
  - an arrangement of sticky notes.
- online:
  - As plain text, or
  - in a mind mapping application.

When the time is up, ask each facilitator to present their map. There's a good chance their map is not perfect, in which case, don't try to turn it into a perfect map,

but just give them a few comments on the most important improvements they can make (those that make their future refinements and detailing of the map easier).

When all the maps are reviewed, explain that Deliverable Maps are usually created as mind maps, then open a new node underneath **Part 2 > A05** in your own mind map and start creating a well-formed map based on their data. Explain every decision you make for the map, and ask them for suggestions wherever possible.

The following is an example of a relatively well-formed structure:

- ArtoLibre@Artophile
  - Infrastructure
    - New server
  - Wave 1
    - Implementation
    - Training
    - Content conversion
  - Wave 2
    - Implementation
    - Training
    - Content conversion
  - Wave 3
    - Identification
    - Implementation
    - Training
    - Content conversion
  - Wave 4
    - Identification
    - Implementation
    - Training
    - Content conversion
  - Wave 5
    - Implementation
    - Training

This map is based on the assumption that training and content conversion are included in the project, which may be different from what your participants assumed for their projects.

Only the third and fourth waves have an identification deliverable (creating a list of applications that are the subject of that wave) because the subject of the other waves is defined beforehand (E.g., the subject of the second wave is the office suite).

Scheduling

Spend 5 to 10 minutes explaining the scheduling concept. Explain that it follows the mapping of deliverables, and that it can be dependency-based (presented as a Gantt Chart) or priority-based (on a task board or Kanban board) depending on the nature of the project, and sometimes on our preferences.

It’s best to schedule the ArtoLibre@Artophile with a dependency-based system, but because of its simplicity, a priority-based approach would work fine as well.

Give them 10 minutes to create a simple schedule based on the Deliverables Map, either dependency-based or priority-based (or both, if they want).

When the time is up, ask each facilitator to present their output.

A priority-based schedule is a single list of items ordered based on some type of priority, in such a way that items on the top will be done first. Such a schedule is a little too plain for our project at this time and would look like this:

- New server
- Wave 1 implementation
- Wave 1 training
- Wave 1 content conversion
- Wave 2 implementation
- Wave 2 training
- Wave 2 content conversion
- Wave 3 identification
- Wave 3 implementation
- Wave 3 training
- Wave 4 content conversion
- Wave 4 identification
- Wave 4 implementation
- Wave 4 training
- Wave 4 content conversion
- Wave 5 implementation

- Wave 5 training

You'll probably have to expand it a little to make sense of it; e.g., explain that this plan will be detailed in the monthly management activities, and, for example, a single item such as "wave 1 implementation" may be broken down into a few items:

- New server
- Wave 1 implementation > the email client
- Wave 1 implementation > the messaging application
- Wave 1 implementation > the cloud storage
- Wave 1 training
- Wave 1 content conversion
- Wave 2 implementation
- Wave 2 training
- Wave 2 content conversion
- Wave 3 identification
- Wave 3 implementation
- Wave 3 training
- Wave 4 content conversion
- Wave 4 identification
- Wave 4 implementation
- Wave 4 training
- Wave 4 content conversion
- Wave 5 implementation
- Wave 5 training

Then explain that, after breaking it down, those items will be ordered again, and they may not be done one after the other anymore; e.g.,

- New server
- Wave 1 training > general, introductory training
- Wave 1 implementation > the email client
- Wave 1 training > the email client
- Wave 1 implementation > the messaging application
- Wave 1 training > the messaging application
- Wave 1 implementation > the cloud storage
- Wave 1 training > the cloud storage

- Wave 1 content conversion
- Wave 2 implementation
- Wave 2 training
- Wave 2 content conversion
- Wave 3 identification
- Wave 3 implementation
- Wave 3 training
- Wave 4 content conversion
- Wave 4 identification
- Wave 4 implementation
- Wave 4 training
- Wave 4 content conversion
- Wave 5 implementation
- Wave 5 training

This type of planning puts less emphasis on timing, and depending on the type of project, it may consider a dynamic scope for the lower parts of the map. Some people may want to have multiple columns for their priority-based schedule, where each column represents a period of time, and doing so, puts more emphasis on timing. This can be fine when used in the right set-up, but there's no need to do so in this workshop.

The following is an example of a dependency-based schedule:

```
ArtoLibre@Artophile 0 15m 30m 1. Infrastructure
──────────┼────────────────────┼────────────────────┼ 1.1. New server │██ │
│ 2. Wave 1 ─────────────────┼────────────────────┼────────────────────┼
2.1. Implementation │ ██████ │ │ 2.2. Training │ █ │ │ 2.3. Content
conversion │ ███ │ │ 3. Wave 2
──────────────────┼────────────────────┼────────────────────┼ 3.1.
Implementation │ ████ │ │ 3.2. Training │ ███ │ │ 3.3. Content
conversion │ ███│ │ 4. Wave 3
──────────────────┼────────────────────┼────────────────────┼ 4.1.
Identification │ ██ │ │ 4.2. Implementation │ ███ │ │ 4.3. Training │
███ │ 4.4. Content conversion │ │ █████ │ 5. Wave 4
──────────────────┼────────────────────┼────────────────────┼ 5.1.
Identification │ ████ │ 5.2. Implementation │ │ ███ │ 5.3. Training │ │
██████ │ 5.4. Content conversion │ │ ███ │ 6. Wave 5
──────────────────┼────────────────────┼────────────────────┼ 6.1.
Implementation │ │ █ │ 6.2. Training │ │ ██ │
```

A chart on paper where the bars are drawn by hand based on dependencies they imagine for elements is good enough for our purpose – in fact, a simple hand-drawn Gantt Chart like this that is well integrated into a complete project management system is hundreds of times more effective than a professional, CPM-based schedule that is not fully integrated.

Give them the confidence that such a schedule is fine and useful, but at the same time, give them a hint or two on how it can become more professional in the future after they've implemented a proper project management system. For example, help them imagine what will happen if 3.2. is delayed – they'll have to revise every direct and indirect successor, whereas if they have a professional schedule, those updates can happen automatically.

Revising the Project Description

At the end of this activity, they have an estimate for the duration of the project, based either on a dependency-based schedule that contains time, or on a rule-of-thumb calculation in a priority-based schedule.

Ask them to revise the duration in the Project Description. Explain that their findings during this activity may cause other changes to the Product Description as well – basically, anything they do during the initiation activity group creates a better understanding of the project, which may be reflected in the Project Description.

Our Project Description didn't have any information about expected cost, and this is the time to add this. We won't do it in an exercise, but just assume that they've used the Deliverables Map and estimated the cost of each element, and their total is 68 Artopools (the unit of currency in Artopolis). This is another piece of information they need to add to their Project Description.

P2-A06 - Identify risks and plan responses

60 to 90 minutes

Explain the purpose of the activity and write it down on the board or mind map.

Risk introduction

Spend a minute or two explaining the difference between risks (desirable or undesirable uncertain events in the future that impact our targets) and issues (desirable or undesirable events in the past or present that differ from our original plans or expectations). Make sure you don't spend too much time on technicalities – a simple understanding is enough for our purpose. After all, P3.express doesn't distinguish between different types of follow-up actions but uses the same artifact and process to manage all of them.

Note that we will have more discussions about follow-up actions in Part 3, and

especially in Part 4; so, keep it simple here and add more information later.

Give them one example of a risk composed based on its cause/effect/impact/response; e.g.,

- **Cause**: Users in the finance department are not tech-savvy and not completely comfortable with change.
- **Effect**: They may not want to migrate from their old-fashioned accounting application to a modern, cross-platform one.
- **Impact**: We're supposed to make exceptions only when the alternative application is inferior to the existing one, which is not the case here. So, we either have to create new exceptions or implement the new application and possibly face a lot of resistance and trouble in the department.
- **Response**: TBD
- **Status**: Open
- **Custodian**: TBD

Explain that every follow-up action and deliverable needs to have a custodian. However, because of the limitations in the context of the scenario, we won't assign custodians during the workshop.

Risk identification

Give them 10 minutes to compose precisely 3 risks in the cause/effect/impact/response format, and leave the response empty for now. Let them know that it's fine to use their imagination.

When the time is up, ask each facilitator to present one risk, and then move to the next facilitator. Repeat this three times to review all the identified risks.

After each risk, ask the participants whether they have any comments, and then give your own comment if needed.

These are a few examples:

- **Cause**: Designers have built a strong muscle-memory in using their existing CAD application.
- **Effect**: Changing the application will slow them down.
- **Impact**: It may take 6 to 12 months for the designers to get used to the

new application and regain their previous speed. During this time, their performance will be lower and they may be annoyed with it.
- **Response**: TBD
- **Status**: Open
- **Custodian**: TBD

- **Cause**: Most clients use common proprietary applications.
- **Effect**: They may expect to receive designs/files in those proprietary formats.
- **Impact**: They may find it annoying or difficult to work with us because of this change.
- **Response**: TBD
- **Status**: Open
- **Custodian**: TBD

- **Cause**: Some users need to access files from outside the company using their personal devices, which use proprietary applications.
- **Effect**: It may cause inconsistencies and problems.
- **Impact**: The inconsistencies and problems may prevent them from accessing the files freely, which may have a negative impact on performance.
- **Response**: TBD
- **Status**: Open
- **Custodian**: TBD

Don’t put too much emphasis on having realistic items, but rather on having well-structured ones that can be integrated into the project management system.

Plan responses

Explain what we mean by responses, and then ask them to come up with responses for the first example you gave them before (free conversation rather than group exercise). These are a few example responses to the risk:

- **Cause**: Users in the finance department are not tech-savvy and not

completely comfortable with change.

- **Effect**: They may not want to migrate from their old-fashioned accounting application to a modern, cross-platform one.
- **Impact**: We're supposed to make exceptions only when the alternative application is inferior to the existing one, which is not the case here. So, we either have to create new exceptions or implement the new application and possibly face a lot of resistance and trouble in the department.
- **Response**:
  - Show them that most companies are using modern applications.
  - Prepare a list of the best alternatives and let them select one.
  - Bring an accounting expert to help with them their decision.
  - Have a new, cross-platform application developed with the exact same functionalities and user interface.
  - Retire some of the oldest accounting personnel and hire younger ones (!)
  - Check the public sector to see whether they've had such a problem, and if so, see what they did in response.
- **Status**: Open
- **Custodian**: TBD

Now that they know how to plan responses, give them 5 minutes to work in groups and plan responses for their own risks.

When the time is up, ask each facilitator to explain their responses, and then ask all participants if anyone has any comments. Add your own comments if necessary.

Explain that some of the responses may require the addition of new deliverables to the Deliverables Map, the schedule, or the Project Description. In fact, this activity can be considered a way of refining our understanding of the project.

Composing the Follow-Up Register

Explain the concept of a Follow-Up Register, and give them 5 minutes to store their existing follow-up items in the register.

P2-A07 - Have the project initiation peer-reviewed

20 to 30 minutes

Explain the purpose of the activity and write it down on the board or mind map.

Then assign each group as the peer reviewer for another group and give them 15 minutes to check everything and prepare a report.

Besides filling in the Health Register, ask them to highlight the areas in which they believe the other team can improve their work, and also point out the most interesting things they've learned while reviewing the other team's work.

When the time is up, ask each facilitator to present their findings.

P2-A08 - Make a go/no-go decision

5 to 10 minutes

Explain the purpose of the activity and write it down on the board or mind map.

Discuss the way this activity would work for the ArtoLibre@Artophile project: The project manager would present the Project Description and other documents to the sponsor and ask them whether they can start the project based on those definitions. The sponsor will check it with other management layers in the company, and based on expectations, some adjustments may be required. Finally, the sponsor will give them a green light to start the project, or thank them and let them know that the company is not willing to run the project based on what they've learned.

For the purpose of the workshop, we'll assume that we have a "go" decision and proceed to the next activity.

P2-A09 - Kick off the project

15 to 25 minutes

Explain the purpose of the activity and write it down on the board or mind map.

Give them 5 minutes to work in teams and come up with an interesting idea for the kick-off meeting, as well as a simple agenda.

When the time is up, ask each facilitator to present their plan, and ask the others to give comments, and add your own when necessary.

P2-A10 - Conduct a focused communication

10 to 20 minutes

Explain the purpose of the activity and write it down on the board or mind map.

Give them 5 minutes to work in teams and compose a short, simple email for the focused communication.

When the time is up, ask each facilitator to read their email, and let the others give comments, and add your own when necessary. Remind them that the message has to be clear, simple, and purposeful, and help them avoid corporate language.

This is a sample text:

> Hello everyone,
>
> I'm glad to let you know that the ArtoLibre@Artopolis project is approved and we're going to start executing it.
>
> This project is aligned with the government's ArtoLibre initiative for replacing as many of the proprietary applications in the public sector with libre alternatives, to improve security, privacy, portability, etc.
>
> We're going to do the same, for the same benefits that the government has in mind, as well as increase the compatibility of our systems with those of the public sector.
>
> The project will take about 30 months, during which time applications will be replaced in 5 waves, starting with simple ones like the email clients, and ending with specialist ones like the CAD and 3D modelling applications.
>
> This is a big change, and there will be a period of discomfort until we all get used to the new applications. However, we'll do our best to make sure it goes as well as possible, and that after a while the overall ecosystem will be better that what we have at this time.
>
> There are representatives from every department in our project team to make sure your needs are covered. However, if you have any concerns, feel free to contact me directly and talk about it.
>
> Regards,
> Project manager's signature

Part 3

5.5 to 7 hours

This part is about the first month of the sample project, where we review the monthly, weekly, and daily cycles.

Common pitfalls

There are some planning aspects in this part, especially in the monthly initiation group. However, remember that planning is only a small portion of these activities and that the main purpose is to give learners a sense of the day-to-day management of projects. For this reason, we won't go into too much detail about planning.

Activity discovery

This part covers 4 activity groups. Start each activity group with a discovery exercise to create the list of its activities without going into too much detail, and then proceed to the exercises.

Exercises

After discovering the activities of each group (B, C, D, and E), go through its exercises, and then start discovering the next activity group.

We'll start the monthly cycle, go through the first week and its daily management activities, go through the second weekly management group, and then jump to the end of the month.

- Monthly Initiation
  - B01 - Revise and refine the plans (exercise)
  - B02 - Have the monthly cycle peer-reviewed (exercise)
  - B03 - Make a go/no-go decision (exercise)
  - B04 - Kick off the monthly cycle (exercise)
  - B05 - Conduct a focused communication (exercise)
- Weekly Management (week 1)
  - C01-w1 - Measure and report performance (exercise)

    - C02-w1 - Plan responses for deviations (exercise)
    - C03-w1 - Kick off the weekly cycle (exercise)
    - C04-w1 - Conduct a focused communication (exercise)
- Daily Management
    - D01 - Manage risks, issues, and change requests (exercise)
    - D02 - Accept completed deliverables (exercise)
- Weekly Management (week 2)
    - C01-w2 - Measure and report performance (exercise)
    - C02-w2 - Plan responses for deviations (exercise)
    - C03-w2 - Kick off the weekly cycle (exercise)
    - C04-w2 - Conduct a focused communication (exercise)
- Monthly Closure
    - E01 - Evaluate stakeholder satisfaction (exercise)
    - E02 - Capture lessons and plan for improvements (exercise)
    - E03 - Conduct a focused communication (exercise)

Conclusion

Give them a quick overview of what has been done in Part 3 and remind them, once again, of the purpose of this activity group.

P3-B01 - Revise and refine the plans

40 to 60 minutes

Explain the purpose of the activity and write it down on the board or the main map.

This is the first monthly cycle. Ask them to check their schedule and tell you which deliverables will be in progress during this month. The answer is the “new server”.

Extra scenario

Next, they need to detail the plan for the upcoming month. This detailing is at least partly technical, and they may not have the technical expertise to do it. This is a good opportunity to explain why they need to have the key team members appointed as soon as possible. Whatever the situation, tell them that they can use their own knowledge and imagination if they are familiar with setting up servers, and otherwise, they can ask you questions as if you’re the IT expert in the project.

This could be the imaginary expert's explanation:

> Well, we already have a few servers, but it's a good idea to set up new servers to avoid potential conflicts. What I have in mind is a physical server with redundancy, and then a number of virtual servers on it, one for each of the services. The type of services we need depends on the applications specified in the various waves, but some of them I can name from the start:
>
> - Email server
> - Calendar server
> - File server
> - XMPP or Matrix server for messaging (probably)
>
> In addition, we'll need to have secure access to some of them from the Web, an automated backup system, a log monitoring system, a resource monitoring system, etc. Finally, our network structure is old and less than perfect, which may create a bad experience for the users, as we will be using the network more than before. While we're working on this project, I would really like to improve our network infrastructure as well.

Exercise

Give them 10 minutes to work in groups and refine their plans for the upcoming month. Tell them that this may change the Project Description, Deliverables Map, schedule, and Follow-Up Register.

When the time is up, ask each facilitator to present their work.

Risk management

One of the things we expect at this point is a serious consideration of the last point in the expert's explanation about improving the IT network. First, the expert is thinking about a risk, so, let's document it in the Follow-Up Register:

> - **Cause**: The IT network is old and less than perfect.
> - **Effect**: It may not be fast or reliable enough, especially when used more intensively by the libre applications.
> - **Impact**: Its low performance may be considered a problem for the libre applications we're going to introduce and cause problems for the adoption

of those applications.
- **Response**: Improve the IT network (?)
- **Status**: Open
- **Custodian**: TBD

Let them know that it's essential for project managers to be looking for risks and documenting them for follow-ups. They should also try to expand conversations and look for similar risks whenever possible. Let's assume that we've tried and no other related risk was discovered.

Change management

The other point about the IT network is that it wasn't part of the project; i.e., it wasn't included in our initial, approved Project Description. So, we can call it a change. Change requests, like risks and issues, are captured in the Follow-Up Register, and we already have an item for it, so, there's no need for documenting it again.

Ask them who they think should approve or reject this change request.

Tell them that in general, it depends on the type of change. If it's a small change with limited impact on project targets, the project manager can decide; otherwise, the project manager should escalate it to the sponsor. The sponsor is responsible for checking it with other people if needed, and letting the project manager know what to do.

The change in this scenario probably impacts the cost and duration of the project, and may also have an impact on operations in the company. Because of this, it's almost always a significant change that should be escalated.

Let's assume that we've estimated it will cost 2 Artopools and add one month to the duration of the project. We've reported this information to the sponsor and asked for their decision. They've approved the change. In that case, we can update the Follow-Up Register:

- **Cause**: The IT network is old and less than perfect.
- **Effect**: It may not be fast or reliable enough, especially when used more intensively by the libre applications.
- **Impact**: Its low performance may be considered a problem for the libre application we're going to introduce and cause problems for the adoption

of those applications.

- **Response**: Improve the IT network (as approved by the sponsor)
- **Status**: Closed
- **Custodian**: –

We also need to update the expected time and cost in the Project Description.

Adjust the plans

Now we have one extra element to add to our plan: the new IT network. Besides, there were extra details provided by the IT expert.

Their Deliverables Map may look like the following at this point:

- ArtoLibre@Artophile
  - Infrastructure
    - Servers
      - New physical and redundant servers
      - Internal services and virtual servers
        - Automated backups
        - Resource monitoring
        - Log monitoring
      - External services and virtual servers
        - Email server
        - Calendar server
        - Messaging server
        - File server
    - IT network
  - Wave 1
    - Implementation
    - Training
    - Content conversion
  - Wave 2
    - Implementation
    - Training
    - Content conversion
  - Wave 3
    - Identification
    - Implementation

        - Training
        - Content conversion
    - Wave 4
        - Identification
        - Implementation
        - Training
        - Content conversion
    - Wave 5
        - Implementation
        - Training

In the real world, you will show this to the experts and ask them whether anything is missing. The hierarchical structure of the Deliverables Map usually helps them fill in the gaps. For example, they may immediately tell you that firewall and VPN are missing.

- ArtoLibre@Artophile
    - Infrastructure
        - Servers
            - New physical and redundant servers
            - Internal services and virtual servers
                - Automated backups
                - Resource monitoring
                - Log monitoring
                - Firewall
                - VPN
            - External services and virtual servers
                - Email server
                - Calendar server
                - Messaging server
                - File server
        - IT network
    - Wave 1
        - Implementation
        - Training
        - Content conversion
    - Wave 2
        - Implementation

        - Training
        - Content conversion
    - Wave 3
        - Identification
        - Implementation
        - Training
        - Content conversion
    - Wave 4
        - Identification
        - Implementation
        - Training
        - Content conversion
    - Wave 5
        - Implementation
        - Training

If you have IT experts among your participants, they will tell you a lot more, and more refinements and adjustments would be possible – the example above is really simplified. Accept their expert suggestions, but keep it limited because it's a project management workshop, not an IT workshop.

Similar details should also be added to the schedule, and their priorities or dependencies/order should be refined as well. Don't go into too much detail when it comes to the schedule.

Deliverable specifications

Explain that another thing they normally do in this activity (as well as in A05) is to document the specification of various deliverables, which can be added as comments in the Deliverables Map (especially if it's prepared as a mind map).

The specifications are the technical attributes, quality criteria, and such. This part is mainly done by collecting the information from internal and external stakeholders, and therefore, there's not much we can do about it in a workshop.

P3-B02 - Have the monthly cycle peer-reviewed

15 to 30 minutes

Explain the purpose of the activity and write it down on the board or main map.

As in A07, assign each team as the peer reviewer for another team. Give them 10 minutes to review their revised documents (Project Description, Deliverables Map, schedule, and Follow-Up Register) and store the result in the Health Register.

When the time is up, ask each facilitator to give a short report of what they found during their peer review, with an emphasis on what they found interesting and what they think can be improved.

P3-B03 - Make a go/no-go decision

5 to 10 minutes

Explain the purpose of the activity and write it down on the board or main map.

Ask them why they think it's important to ask for a go/no-go decision every month, and spend 5 to 10 minutes discussing it.

Similarly to A08, we'll assume a "go" decision and proceed.

P3-B04 - Kick off the monthly cycle

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map.

As in A09, ask one of the teams to prepare for and run an imaginary kick-off meeting for everyone.

P3-B05 - Conduct a focused communication

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map.

As in to A10, give them 5 minutes to work in groups and prepare the content of the email they would send for this focused communication.

When the time is up, ask each facilitator to read out their text, ask everyone to give comments, and add your own if needed.

This is a sample text:

> Hello everyone,
>
> We’re about to start the first monthly cycle of the ArtoLibre@Artophile project.
>
> This month is all about the infrastructure: the servers and the IT network. The latter is a new addition to the project because we realized that the existing IT network may not be good enough for our libre applications and may cause trouble for users. This extra deliverable will increase our cost and duration a little, but it seemed necessary for the success of the project and was approved by the sponsor.
>
> Regards,
> Project manager’s signature

P3-C01-W1 - Measure and report performance

2 to 5 minutes

Explain the purpose of the activity and write it down on the board or main map.

Since this is the beginning of the project, we don’t have any progress and deviations. In practice, the first instance of this activity can be used to set up the measurement system. However, in our workshop, you can just explain the case and proceed to the next activity; we’ll set up the measurement system in the second instance of this activity.

P3-C02-W1 - Plan responses for deviations

2 to 5 minutes

Explain the purpose of the activity and write it down on the board or main map.

Since this is the beginning of the project, we don’t have any deviations yet, so let’s skip this activity and go to the next one.

P3-C03-W1 - Kick off the weekly cycle

5 to 10 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give one of the teams 5 minutes to prepare and run an imaginary weekly kick-off meeting for everyone. Other teams can take a break during the preparation time.

P3-C04-W1 - Conduct a focused communication

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them 5 minutes to work in teams and prepare a focused communication email using their imagination. When the time is up, ask each facilitator to read out their text.

This is a sample text:

> Hello everyone,
>
> We'll be working on the following this week:
>
> - Servers > Buying the new server
> - IT network > Buying new Ethernet cables
> - IT network > Replacing the old CAT5 cables with CAT6 ones
>
> The first two item will be finished by the end of the week, but the last one will extend into the next week.
>
> Regards,
> Project manager's signature

P3-D01 - Manage risks, issues, and change requests

20 to 25 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them this scenario:

You're having lunch with one of the team members who represents the design department.

Them: By the way, I was talking to one of my peers in a supplier company called Artobuilders when I realized that they had already finished running a project like ours.

You: Oh, interesting. Has it been successful?

Them: Yes. They only had a few issues with their CAD application.

You: Such as?

Them: They had selected QCAD, which is a well-known application. However, some engineers were not comfortable with it. After a few months, they realized that there's a fork of that application called LibreCAD that has solved those issues. They were fine after switching, but they effectively lost a few months trying to adopt QCAD.

Give them 10 minutes to use the scenario and their own imagination to design a few follow-up actions.

When the time is up, ask each facilitator to present one follow-up action and then move on to the next team. Repeat this multiple times until they have presented all their items. For each item, ask everyone to comment, and add your own comment if needed.

The obvious item would be something like this:

- **Cause**: QCAD is a famous application that many people use. However, it's a little old-fashioned.
- **Effect**: It doesn't satisfy some of the expectations of the engineers.
- **Impact**: That makes it difficult for the engineers to adopt it.
- **Response**: This problem was solved in Artobuilders when they switched from QCAD to LibreCAD. It may be a good idea to give a high priority to LibreCAD when it's time to select a CAD application.
- **Status**: Open
- **Custodian**: TBD

However, we don't expect to end it here. There's another great opportunity here: Other people in Artobuilder may have more to say about other applications. So, let's add another follow-up action:

- **Cause**: Companies that work in the same domain have similar needs.
- **Effect**: Their experience in transitioning to libre applications may be applicable to us as well.
- **Impact**: If we can use their learned lessons, we can avoid a lot of trial and error and rework, and finish the project more easily, quickly, and smoothly.
- **Response**: Let's check for other companies in our industry who have transitioned to libre applications, and find a way to get in touch with them and use their experience.
- **Status**: Open
- **Custodian**: TBD

Now tell them that after documenting this follow-up action, one of the team members has contacted you and told you that there's a company called Artoaudit that has a relationship with Artophile and works in the same industry. They started a similar project only a few weeks ago. Give them 5 minutes to document the follow-up action, and then think about various possible responses.

When the time is up, ask each facilitator to present their item, and explain their planned responses.

For example:

- **Cause**: Artoaudit has a good relationship with our company and works in the same industry, and they have recently started a project similar to ours.
- **Effect**: We will probably share many concerns, and a good solution for one would likely be a good solution for the other as well.
- **Impact**: If we can work closely and share as much experiences as possible, we will avoid problems and build better solutions.
- **Response**:
  - It would be helpful if we could both agree to share our focused communications and Follow-Up Registers with each other (?)
  - Maybe we can arrange for some of the project team members from each side to attend the E02 activity of the other company (?)
- **Status**: Open

- **Custodian**: TBD

Ask them a few questions to see how they would decide about responses such as those above. What we expect is for them to point out that such decisions are significant enough to be escalated to the sponsor because sharing information between two companies should not be done without permission from managers.

Then ask them what they would do if the sponsor was to approve those two responses. In that case, besides updating the follow-up item, we would also update the Project Description to add the new stakeholder and include them in our communications.

P3-D02 - Accept completed deliverables

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map.

Tell them that the servers have been bought, and give them 5 minutes to work in groups and think about what they should do when such a deliverable is completed.

When the time is up, ask each facilitator to present their opinions.

The first thing they have to do is to check and make sure that it's really done. Some team members tend to consider something that is almost done as done. For example, maybe they have just placed the order and made the payment, but the server is not yet shipped; they call it done because the main work is done and they see no reason for having a problem in delivery. However, we know that we should difficulties.

If the item is really finished, we can mark it as done in our documents (schedule, Deliverables Map, etc.)

Are there any of the departments in the company responsible for managing procurements? E.g., to store the guarantee and warranty information? Probably there are, but if not, it's a good idea for the project manager to create a catalogue of such information, and hand it over to a responsible person when the project is over.

P3-C01-W2 - Measure and report performance

20 to 30 minutes

Ask the participants to imagine that enough time has passed and it's time to start the second weekly cycle.

This is the status until the end of the week:

- Buying the server: done
- Buying Ethernet cables: done
- Replacing the old Ethernet cables with new ones: not started yet (cables arrived too late)

Explain that most projects limit themselves to calculating a percentage complete, which they can do by using different methods that are usually based on giving a weight and a percent complete to each element at the bottom of the map, and then calculating the parent elements with a weighted average.

While calculating a percentage complete is useful, it's not as important as **forecasting**:

- In typical fixed-scope projects: forecast for the duration and cost
- In fixed-duration projects: forecast for the amount of scope that can be completed by the end of the project and the cost forecast (unless cost is fixed as well)

There are different ways of forecasting, ranging from simple, more or less intuitive ones to the advanced ones using Earned Schedule and similar methods. For people who have just started using structured project management methods, it's best to use a simple, intuitive one. So, ask them to spend 10 minutes working in groups and use a simple rule of thumb to forecast the time and cost required for completing the project, based on the information above and their own imagination.

When the time is up, ask each facilitator to present their results. Ask the others to give comments, and add your own when needed.

This is an example of a rough forecast:

> The "infrastructure" deliverable has two parts: the server and the network. The first one is our dependency, because we need it in order to start installing the applications from Wave 1, but the network is already in place and we're only improving it – so, even though the network is a little late, since it can be ready before we go live with Wave 1, there's no real delay to the whole project.

> Everything we've done so far has cost us as expected, and we've not found any reason to believe that the future work will be more or less expensive. So, our forecast for costs is the same as in the original plan.

As they proceed in their project, especially in longer projects, forecasting won't be as simple as this, but still a simple, intuitive method like this is good enough. After they become comfortable with their project management system, they can gradually start using more advanced methods of measurement.

Another way of thinking about it is this: If your projects are simple and small, the rough forecasts are good enough, whereas if they are going to be large and complicated, you may need to hire a project planner to take care of such measurements anyway ;)

P3-C02-W2 - Plan responses for deviations

10 to 15 minutes

Our example in the previous activity didn't have any deviations, which is rarely the case in a real project. So, let's assume that we forecast the server to be delivered about a month later, for about 4 Artopools more than expected.

Give them 5 minutes to work in groups and come up with a response for the deviation. They need to use their imagination to replace some of the missing information.

When the time is up, ask the facilitators to present their ideas.

Sample responses:

> We couldn't find a way to reduce costs in future work, and as a result, we have to update our initial budget. The 4 Artopool increase is about a 6% increase in the overall budget of the project, which makes it a significant decision. We have to escalate it to the sponsor and ask for an increase in the budget.
>
> We originally decided to start working on Wave 1 after the infrastructure was done. However, Wave 1 starts with an investigation of the solutions and the selection of an application, which don't require a server to do. As a result, we can add an overlap between these two main deliverables and start Wave 1 before the infrastructure is finished, and so recover from the existing time

> deviation.

Explain that the main point is that we don't want to wait until the project is too deviated; instead, we want to recover from deviations as soon as we discover them, because doing so is easier and gives us more options.

P3-C03-W2 - Kick off the weekly cycle

15 to 20 minutes

Give one of the teams 5 minutes to prepare and run an imaginary weekly kick-off meeting for everyone. Other teams can take a break during that 5 minutes.

When the presentation is over, give them this scenario:

Everyone is in the room for the kick-off meeting except for one: the representative of the finance department. You wait a little, and they don't show up. You call, and there's no response. After the meeting, you receive this message from them:

> Sorry for not attending today's meeting. We're busy with an important task in our department, and the CFO wants me to stop everything else and focus on it for a while.

Give them 5 minutes to work on this situation. When the time is up, ask each facilitator to present their ideas.

The first step in such a case is to open a follow-up action:

> - **Cause:** There's an important task in the finance department.
> - **Effect:** The CFO has asked the finance representative in our team to stop everything else and focus on that task.
> - **Impact:** The concerns of the finance department won't be reflected in the project, which introduces various risks and the possibility of a rework.
> - **Response**: For now, let's ask the sponsor to take care of it. Then, if it doesn't work, we'll try to find another solution.
> - **Status**: Open
> - **Custodian**: Project manager

It’s important for them to identify the fact that the sponsor is probably needed to deal with an issue like this.

P3-C04-W2 - Conduct a focused communication

10 to 15 minutes

Give them 5 minutes to work in teams and prepare a focused communication email using their imagination. When the time is up, ask each facilitator to read out their text.

Here is a sample text:

> Hello everyone,
>
> We’ll be working on the following this week:
>
> - Servers > Configuring the servers
> - IT network > Replacing the old CAT5 cables with CAT6
> - IT network > Buying new routers
> - IT network > Installing and configuring the new routers
>
> The first three items will be finished by the end of the week, but the last one will extend into the following week.
>
> Regards,
> Project manager’s signature

P3-E01 - Evaluate stakeholder satisfaction

15 to 20 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them 10 minutes to design two sets of questions for evaluating the satisfaction of the team members and the external stakeholders.

When the time is up, ask each facilitator to present their lists, ask others to give comments, and add yours if needed.

For example:

Team members:

- How easy is it to interact with other team members?
- How easy is it to interact with the project management team?
- Are your role and responsibilities clear enough?
- Do you have a clear image of the project?
- How realistic are the goals in this project?
- How happy are you with the project management system?
- Overall, how happy are you with your job?

Other stakeholders:

- Do you have a clear understanding of what happens in the project?
- How easy is it to communicate with us?
- Is our management process clear enough for you?
- Is the project moving in the direction you expected it to?
- Overall, how happy are you with this project?

The actual purpose of this activity is to evaluate the stakeholders' satisfaction, but designing the questions is enough for our workshop.

P3-E02 - Capture lessons and plan for improvements

15 to 25 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them the following as an imaginary result of the stakeholder satisfaction evaluation:

Team members:

- 75% - How easy is it to interact with other team members?
- 80% - How easy is it to interact with the project management team?
- 68% - Are your role and responsibilities clear enough?
- 52% - Do you have a clear image of the project?
- 72% - How realistic are the goals in this project?

- 75% - How happy are you with the project management system?
- 80% - Overall, how happy are you with your job?

Other stakeholders:

- 67% - Do you have a clear understanding of what happens in the project?
- 75% - How easy is it to communicate with us?
- 85% - Is our management process clear enough for you?
- 80% - Is the project moving in the direction you expected it to?
- 80% - Overall, how happy are you with this project?

Give them 10 minutes to use the imaginary evaluation above, and other experiences they've had during the imaginary month to capture lessons and plan improvements.

When the time is up, ask each facilitator to present one follow-up action and then move on to the next facilitator. Repeat this multiple times, until everyone is finished. After each item, ask the participants whether anyone has any comments, and add your own if needed.

Examples:

- **Cause**: Our project includes a discovery element (e.g., the alternative applications) and not everything is specified upfront.
- **Effect**: Because of this, the whole project seems unclear to some stakeholders.
- **Impact**:
  - It may reduce their trust.
  - It may reduce their collaboration and buy-in.
  - (more?)
- **Response**: TBD
- **Status**: Open
- **Custodian**: TBD

Don't spend too much time discovering the best responses for all the items, but instead do it for one or two, and then only focus on identifying more items.

P3-E03 - Conduct a focused communication

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them 5 minutes to compose the content of an email for this focused communication. When the time is up, ask each facilitator to read out their message. Give comments if necessary.

Example:

> Hello everyone,
>
> We’re done with the first monthly cycle of the ArtoLibre@Artophile project.
>
> During this month, the new physical servers are fully set up and ready for us to add virtual servers and services to them. The improvement of the IT network is in progress, but it’s an incremental change and we already have a faster and more reliable network.
>
> I’m looking forward to working with all of you on our next deliverables – See you soon in the next kick off meeting!
>
> Regards,
> Project manager’s signature

Part 4

1 to 1.5 hours

In this part, we assume that enough time has passed and the project is approaching its end – so we'll be focused on the project closing activities.

Activity discovery

Start this part with a discovery of the project closure activities. When done, proceed to the exercises.

Exercises

After discovering the activities, go through them one at a time:

- F01 - Hand over the product (exercise)
- F02 - Evaluate stakeholder satisfaction (exercise)
- F03 - Have the closing activity group peer-reviewed (exercise)
- F04 - Archive the project documents (exercise)
- F05 - Celebrate! (exercise)
- F06 - Conduct a focused communication (exercise)

Conclusion

Give them a quick overview of what has been done in Part 4 and remind them, once again, of the purpose of this activity group.

P4-F01 - Hand over the product

10 to 20 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them 5 minutes to work in groups and think about how they can hand over the product of ArtoLibre@Artopolis and about the risks and concerns involved in it.

When the time is up, ask each facilitator to present their ideas, then ask all the participants to give comments and add yours if necessary.

In general, they need the internal or external customer to appoint someone to receive the product. During the hand over, all elements of the product will be reviewed and received. If there are any extra work or special maintenance concerns, they will discuss and document them.

Finally, the other person will officially accept the product.

Handovers are more serious in external projects, and especially when the product is physical. However, non-physical and internal projects still need a simple handover.

P4-F02 - Evaluate stakeholder satisfaction

5 to 10 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them the following imaginary results for the last evaluation:

Team members:

- 81% - How easy is it to interact with other team members?
- 87% - How easy is it to interact with the project management team?
- 77% - Are your role and responsibilities clear enough?
- 81% - Do you have a clear image of the project?
- 87% - How realistic are the goals in this project?
- 91% - How happy are you with the project management system?
- 90% - Overall, how happy are you with your job?

Other stakeholders:

- 85% - Do you have a clear understanding of what happens in the project?
- 95% - How easy is it to communicate with us?
- 97% - Is our management process clear enough for you?
- 85% - Is the project moving in the direction you expected it to?
- 95% - Overall, how happy are you with this project?

Without having a group exercise, ask them what they think they should do with this evaluation, and discuss their ideas.

Next, we need to store the results in the Health Register. Then, we can use this information to refine our Follow-Up Register when closing the remaining items.

P4-F03 - Have the closing activity group peer-reviewed

5 to 10 minutes

Explain the purpose of the activity and write it down on the board or main map.

It's difficult to have a hands-on exercise for handing over the product and evaluating stakeholder satisfaction. As a result, there's not much done in the simulated project to have a peer-review exercise. Instead of an exercise, you can have a short discussion about this concept and then move on to the next activity.

P4-F04 - Archive the project documents

10 to 20 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them 5 minutes to work in groups and think about how they should archive their documents, and about the risks and concerns involved in this process.

When the time is up, ask each facilitator to present their ideas, ask the others to give comments, and add your own if necessary.

Example:

> Once I was made responsible for a new project. I realized that a similar project had been done a few years before, so, I decided to take a look at their documents and learn more about this type of project. I couldn't find all the documents, and even for those that I did find, I didn't know whether they were the latest version. I kept thinking how great it would be if there was a central place I could go to and get the latest version of all the documents.

P4-F05 - Celebrate!

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map.

This activity may not be taken seriously enough in most projects, but it has a great positive impact on future projects. With this in mind, make sure it's not underestimated in the workshop either.

Give them 5 minutes to discuss it in groups, and come up with a great celebration idea. When the time is up, ask each facilitator to present their plan.

For example, since the project impacts the whole organization, they could have a celebration that includes the whole organization. They could take a whole day for it and celebrate it in the Artophile Center, with great food and drinks, and live music, and even invite one or two of the main maintainers of the libre applications they have implemented to give a short presentation and tell them about the history of those applications and the stories that come with them.

P4-F06 - Conduct a focused communication

15 to 20 minutes

Explain the purpose of the activity and write it down on the board or main map.

This focused communication is done by the sponsor instead of the project manager, so for the first time during this workshop, ask them to play the role of the sponsor.

Give them 5 minutes to work in groups and prepare the content of an email that the sponsor will send for this focused communication. When the time is up, ask each facilitator to read out the text.

Example:

> Hello everyone,
>
> Today, the ArtoLibre@Artophile project is officially closed. I appreciate all your efforts in every role inside and outside the project team; especially xxxxx who managed the project, xxxxx and others in the IT department who implemented the applications, and all the department representatives.
>
> It's a natural human tendency to be afraid of change, and we're no exception to that. I hope all of your concerns have been addressed adequately during the

project, but if you have any remaining concerns or worries, that's understandable – just make sure you talk to me or the IT department about it, and we'll try to find a solution. We may have a long transition period, but after that, we expect the new ecosystem to work much better than the old one.

Regards,
Sponsor's signature

Part 5

45 to 70 minutes

This part is about the post-project cycle. We assume that enough time has passed since we closed the project, and we go through a couple of post-project cycles.

Activity discovery

Start by discovering the post-project activities, then proceed to the exercises.

Exercises

We'll assume that the same person who used to be the sponsor of the project is responsible for the post-project cycles after the project closure. The participants will now play this role.

Moreover, it takes a long time for a project like ArtoLibre@Artophile to realize its benefits. So, imagine that it's 2 years after the project closure.

After discovering the activities, go through each activity in this group and do the exercises:

- G01 - Evaluate the benefits (exercise)
- G02 - Generate new ideas (exercise)
- G03 - Conduct a focused communication (exercise)

Conclusion

Give them a quick overview of what has been done in Part 5 and remind them, once again, of the purpose of this activity group.

P5-G01 - Evaluate the benefits

20 to 25 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them 10 minutes to work in groups and use their imaginations to measure

benefits (and disbenefits).

When the time is up, ask each facilitator to present their imaginary measurements.

Example:

- More compatibility with the public sector: Seems to be easier to work with them than before.
- More security and privacy: Our score in the independent annual audit for security and privacy is currently 86%, whereas it used to be 72% before the project.
- Less software lock-in: We're truly not locked in to certain applications; we decided to change our email client and vector image editor applications, and the switching was seamless.
- More environmentally friendly: We've had to replace much fewer devices in the new ecosystem compared to before, which is good for the environment.
- Less expense:
    - We've had a 28 Artopool cost reduction in license costs during the last 6-month period.
    - Our old computers, which used to be considered at the end of their lives, have suddenly become fast and performant! Replacing them would have cost us about 70 Artopools.
- Impact on performance:
    - The performance of our architects, which initially decreased by about 30% because of switching into a new application, is now almost back to normal.
    - The performance of our admin staff, which was initially decreased by about 40%, is now recovered and is even 15% higher than before.
    - The graphic designers are still not fully happy with Gimp and prefer to use Photoshop.
- Recruitment: When hiring new people, we can't expect them to be familiar with our applications, and therefore, any new hires need a longer training period.

P5-G02 - Generate new ideas

20 to 30 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give each team 10 minutes to generate improvement ideas based on their own imaginary evaluation in the previous activity. Encourage them to think big; after all, they are playing the role of an executive in the company!

When the time is up, ask each facilitator to present their ideas.

Example:

- There's a conference about sustainable development coming up. Maybe we can give a presentation there and explain our transition and the way it has helped create a more sustainable environment for us. Doing this will help improve our reputation, and it may generate more leads for us.
- The national police have invited all architecture firms to a bid for their new project. One of their evaluation criteria is the security of internal processes and software. We already have a great score (86%), and if we can increase it to 90%, we would have a great chance of winning the project without lowering our price. Let's initiate a small project aimed at reaching a security and privacy score of 90%!
- The main problem graphic designers have with Gimp (compared to Photoshop) is that Gimp doesn't have non-destructive adjustment layers. We can join forces with Artoaudit and Artobuilders and sponsor the Gimp team and support them financially to add the feature in their next release; it will cost each of us 70 Artopools to do so, and it will probably take them about 6 months to add the feature.
- Pass on part of the cost reductions to the staff, as a bonus, to create a more positive impression of the project.

P5-G03 - Conduct a focused communication

10 to 15 minutes

Explain the purpose of the activity and write it down on the board or main map.

Give them 5 minutes to work in groups and prepare the content of an email they would send for the focused communication.

When the time is up, ask each facilitator to read out their text.

Example:

Hello everyone,

Since the completion of the ArtoLibre@Artophile project, we've had an expected decrease in performance because we needed time to get used to the new applications. Fortunately, most of that is recovered, and some departments even have a higher performance than before. However, some departments have not fully recovered yet, and we're looking for solutions to that.

Artophile is now a lot more sustainable and environment friendly because we don't have to replace our computers and other devices as frequently as we did before. This, along with the reduction in license fees, has been a significant cost saving for the company, and we're going to spend that money on two things:

- We, along with Artoaudit and Artobuilders, are going to sponsor the Gimp project to add non-destructive adjustment layers to their image editing application, as it's a key feature we need to use in Artophile. That would made it much easier for our graphic designers.
- The rest of the money will be paid to all employees as a bonus :)

So, that's it about ArtoLibre@Artophile for now. Don't forget to contact me or the IT department if you have any concerns about the new ecosystem.

Regards,
Sponsor's signature

Part 6

20 to 30 minutes

This part is about concluding and closing the workshop.

Learning more

The participants have a good understanding of how they can use P3.express at this point. However, this understanding can be deepened and sustained by recommending that they do the following two things:

1. **Read the manual**: After taking your workshop, reading the manual will be easier and more fruitful for the participants. It's also a good review of what you did in the workshop, and a reference they can use later on.
2. **Take the Artophile Center project simulation**: The Artophile Center project simulation (eLearning course) is another opportunity they have for practicing what they've learned in the workshop.

Teaching

Teaching is learning. Maybe you can suggest they teach P3.express to their colleagues. Besides helping the participants to learn more from teaching, it also makes it easier for them to use P3.express in their projects when more people are familiar with it.

Let them know that teaching is not limited to comprehensive programs like the one you've delivered, but it can even be a short seminar – one that they can comfortably give after finishing your workshop.

P3.express rights

Point out the Creative Commons license of P3.express and explain the nearly unlimited rights it gives to the users:

- They can write a book about it and publish it without having to ask for permission and without having to pay a license fee.
- They can create a project management system based on P3.express (e.g., ArtophileExpress) and sell it without having to ask for permission or having to

pay a fee.
- Etc.

Contributing

P3.express is a non-proprietary system that belongs to the community and grows with its contributions. Contributing is a win-win choice, as it helps the contributor learn more and become an active member of an interesting network, and also helps others because of what they have contributed.

Give them a few examples of typical contributions:

- Reviewing new content and suggesting improvements
- Internationalization (translations)
- Building new themes and add-ons

Besides all of that, there’s also room for self-initiated, innovative ways of contributing.

Staying informed

Let them know that the best way to stay informed about invitations to contribute, events, new material, and more, is to subscribe to the P3.express announcement emails. It would be a good idea to actively encourage them to do so.