



P3.express

minimalist project management system

Draft



Last update: 2023-08-04

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<https://p3.express/training/instructor-led-workshops/>

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If you have any suggestions, we'd be happy to hear about them:
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We'll talk about the CC-BY license later on. If you're not familiar with it, take a look at this short explanation:

<https://creativecommons.org/licenses/by/4.0/>

Basically, it's like "open source" software, but we don't call it open source, because the term doesn't match non-software entities very well.

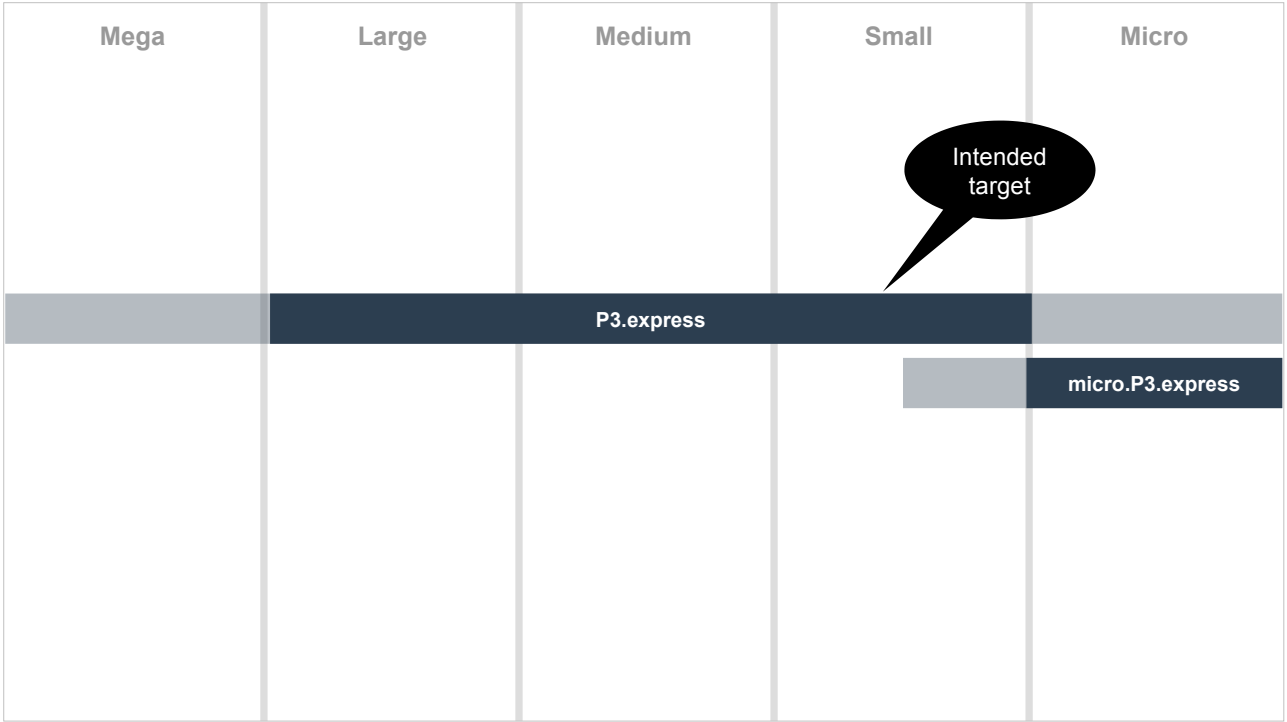
You can encourage your learners to use these slides to teach their friends and colleagues: teaching is learning!

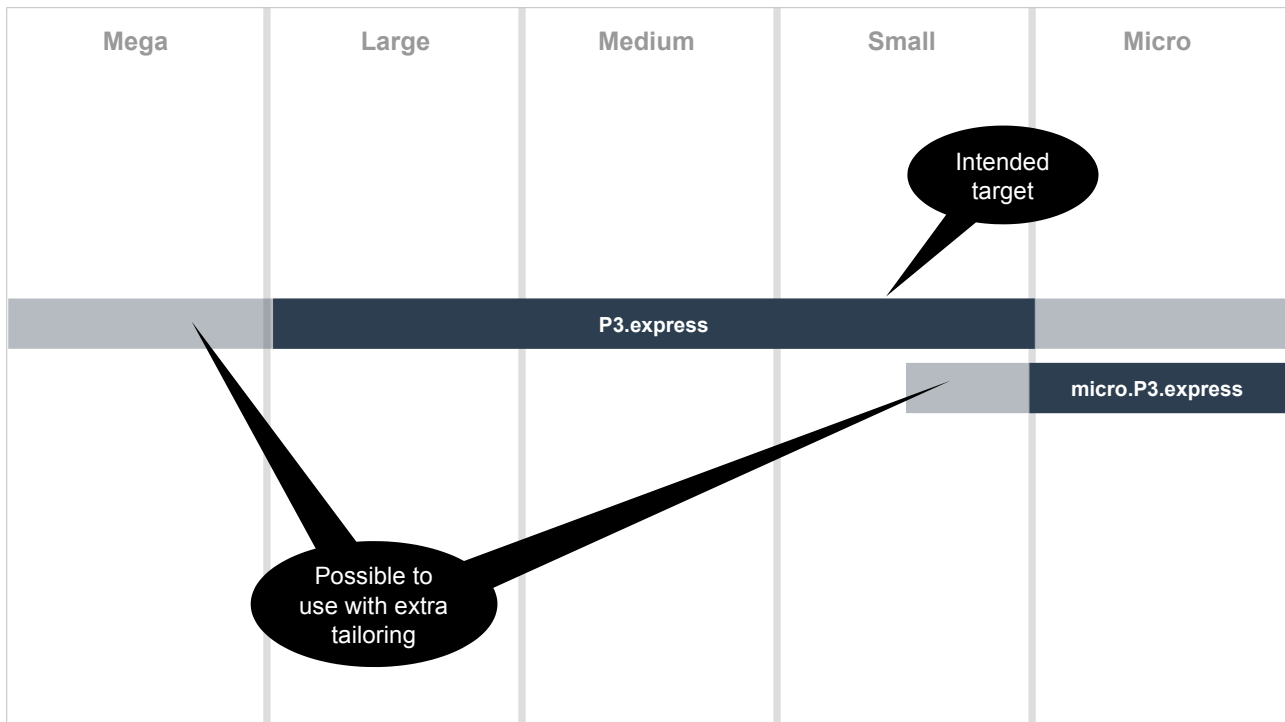


The first section is a really high-level overview of how P3.express works. It gives your audience a simple foundation, and you can build on top of that by adding more detail in the next section.

So, make sure you're not going into too much detail yet, and focus on creating the foundation. If learners ask questions that may become too detailed, park them for the next section and focus on the high-level aspects for now.

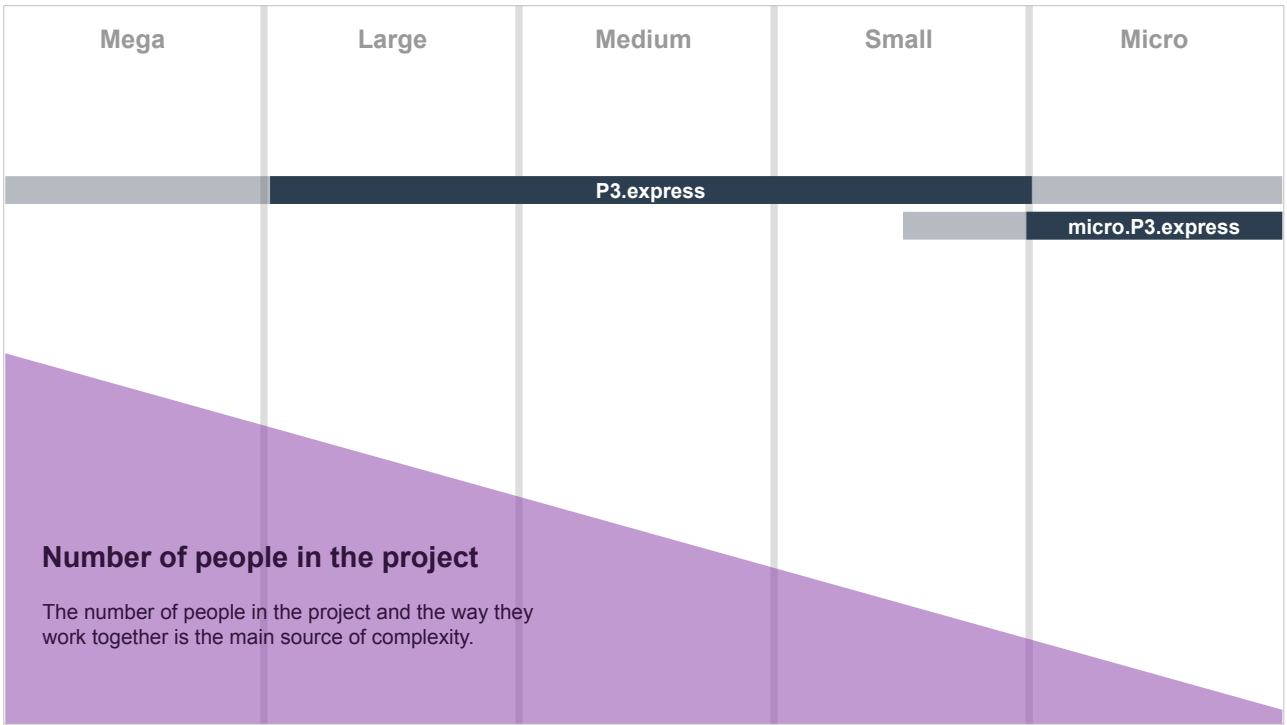
Mega	Large	Medium	Small	Micro
	P3.express			
				micro.P3.express

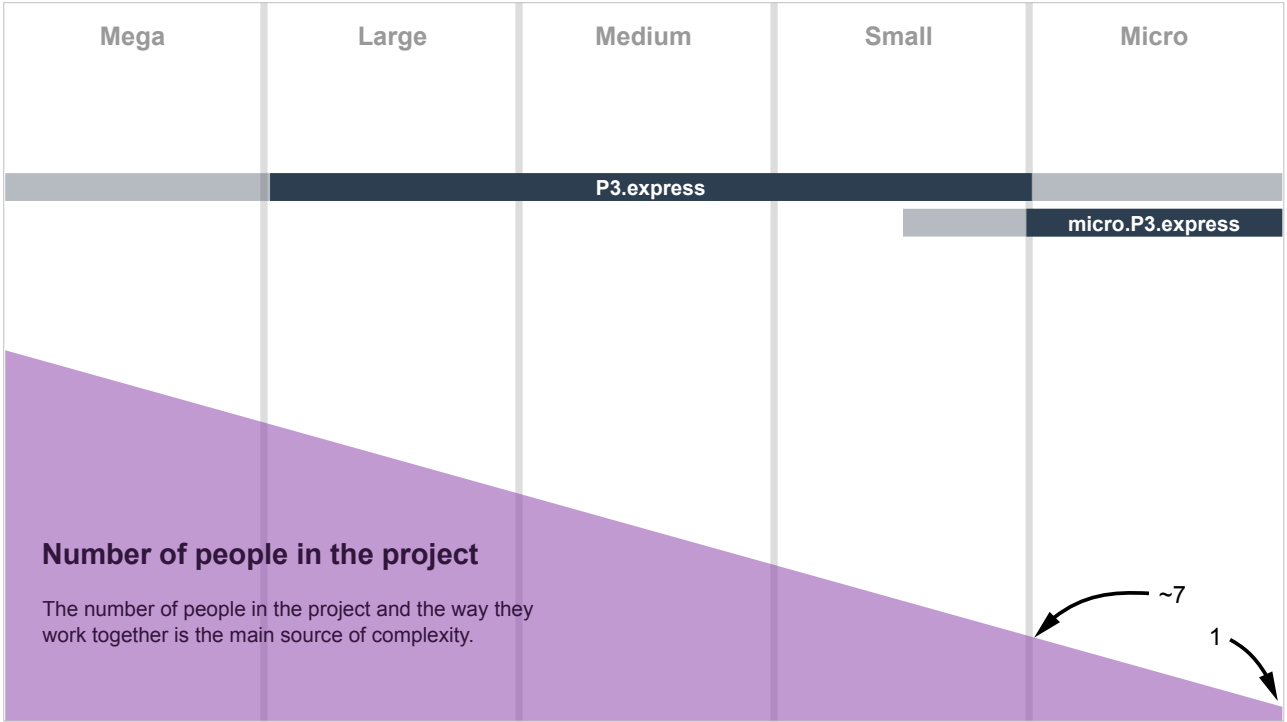


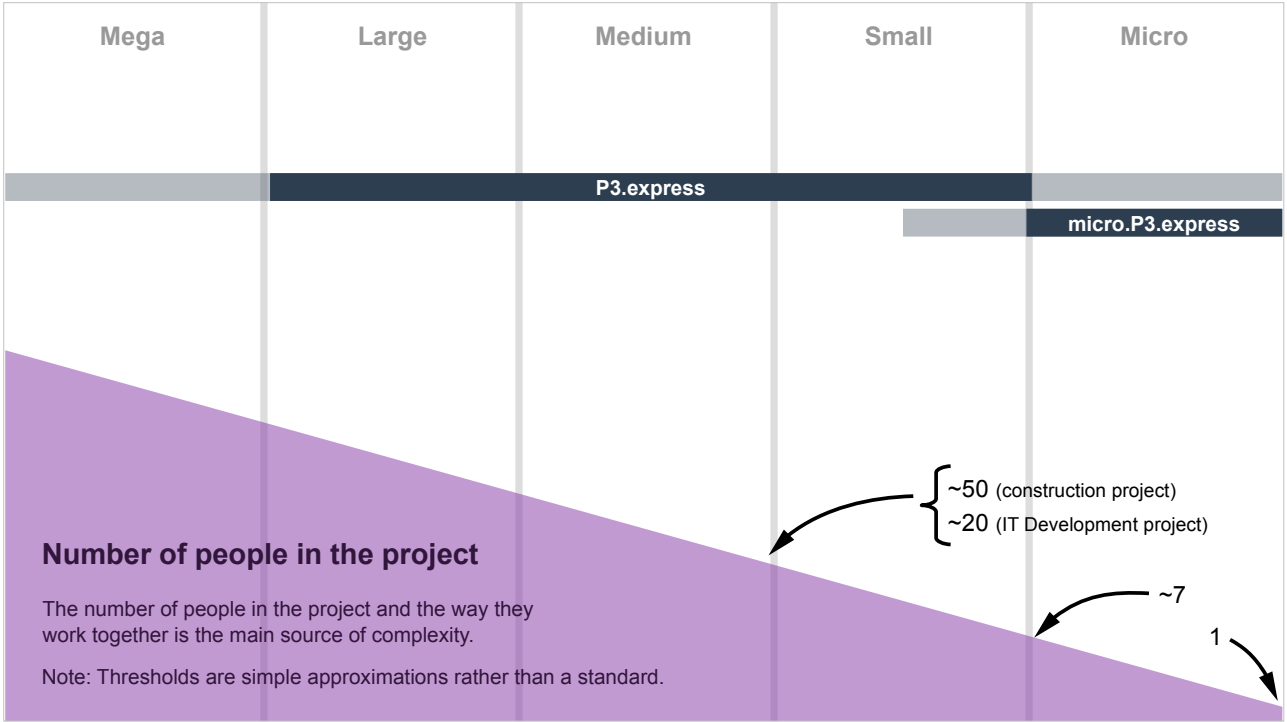


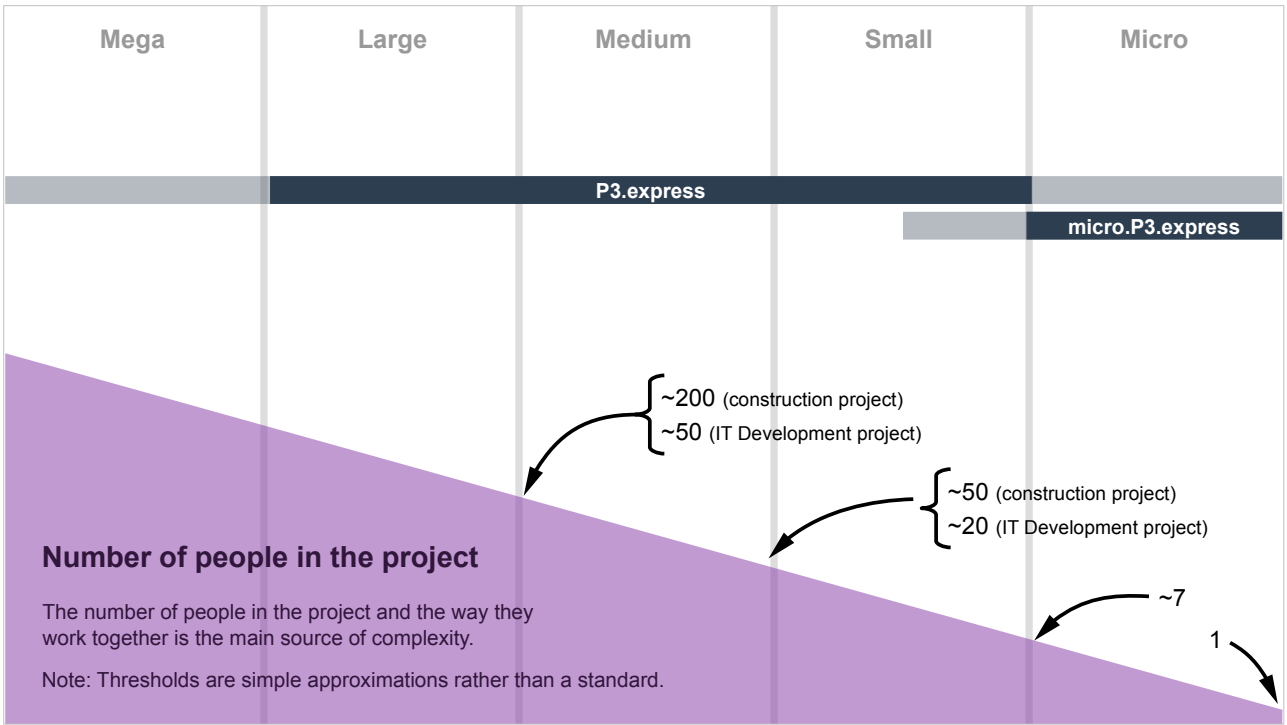
We have some slides toward the end of the course about tailoring. For now, the idea is that people can use P3.express without serious tailoring and only do so gradually after implementation. This is the case if they do it in the right domain: small, medium, or large projects. Even in those, some special projects may not be covered because any attempt to make the system compatible with all types of projects would make it too complicated to use.

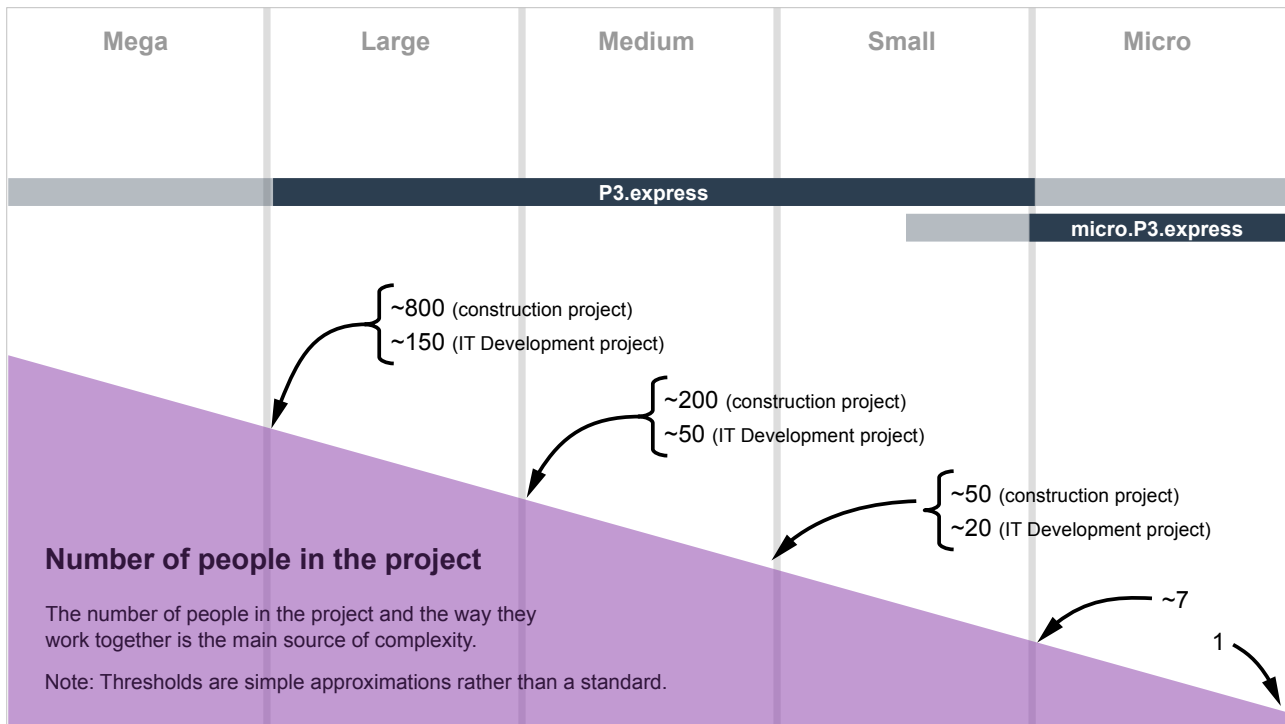
Since there's already a micro.P3.express, there's no reason for anyone to tailor P3.express for smaller projects. On the other hand, comparing micro.P3.express with P3.express shows what true tailoring means and how complicated it can be.







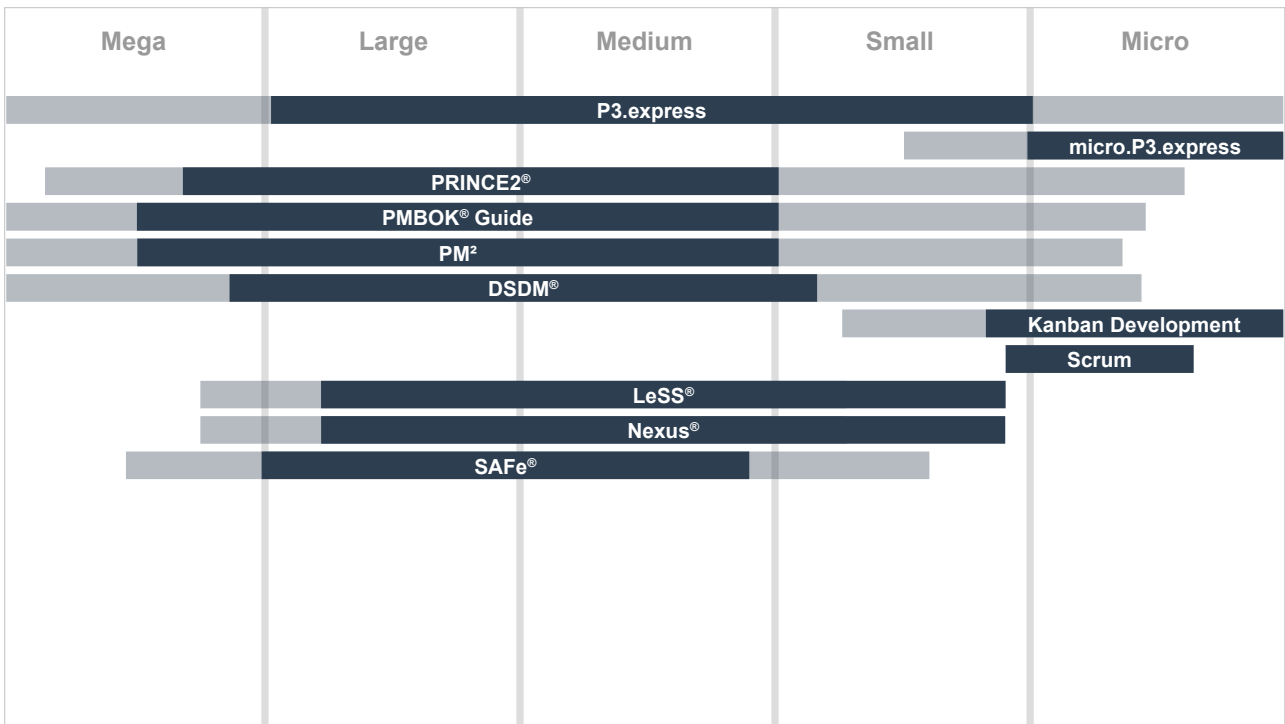




Construction projects and IT development projects are only two of many examples, and the numbers are very rough ideas of what the size means. The main message is that it's not only about the number of people but also how they work together, which in turn depends on the type of project.

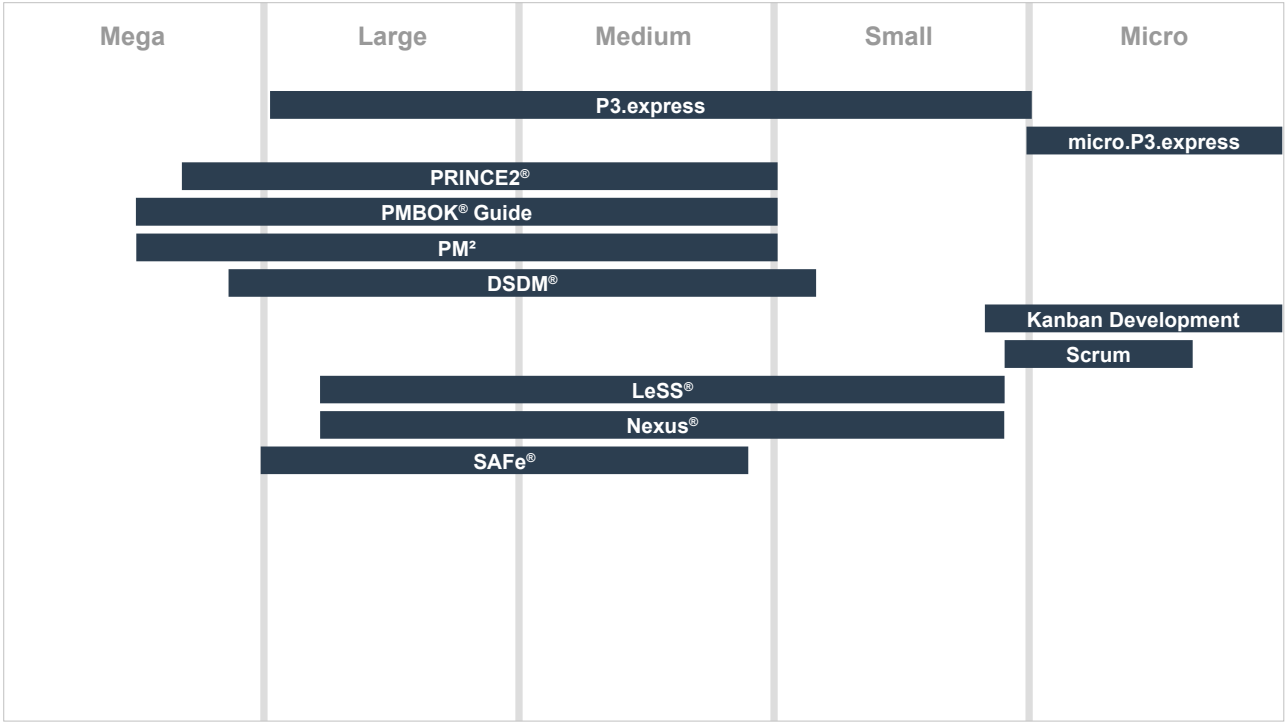
For micro-projects, the impact of the project type is limited, and that's why we have simple numbers for all kinds of micro-projects.

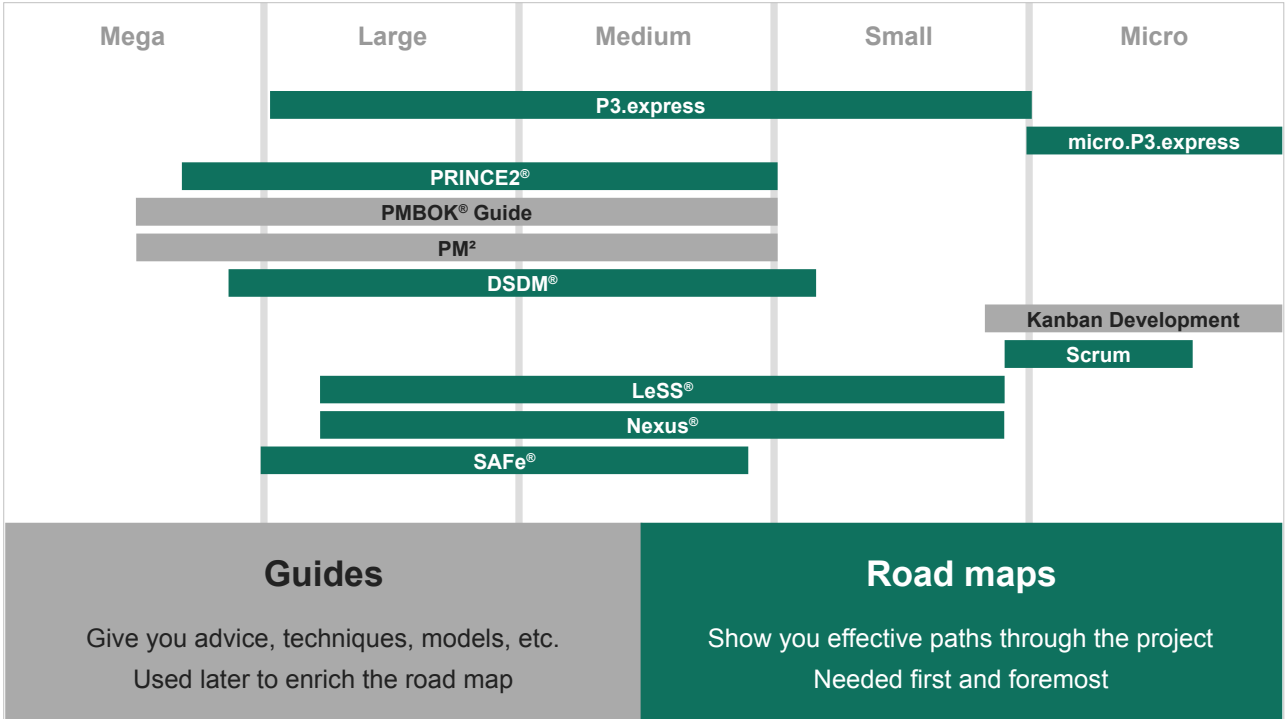
Mega	Large	Medium	Small	Micro
	P3.express			
				micro.P3.express

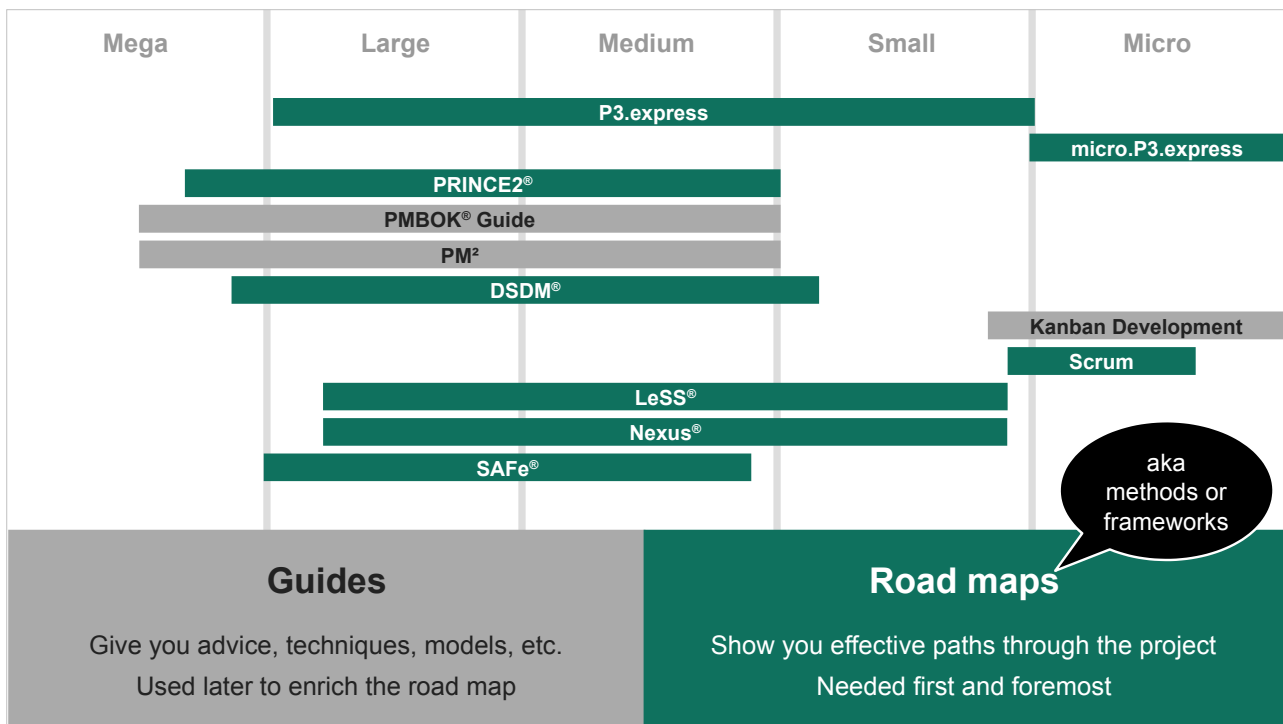


Where each system sits in this diagram can be debated for hours and even become controversial! What we have here is not the absolute truth and should be seen as an approximation to help us understand them.

If your audience is unfamiliar with any of these systems, don't spend too much time here and only use these few slides to inform them about the range of options.



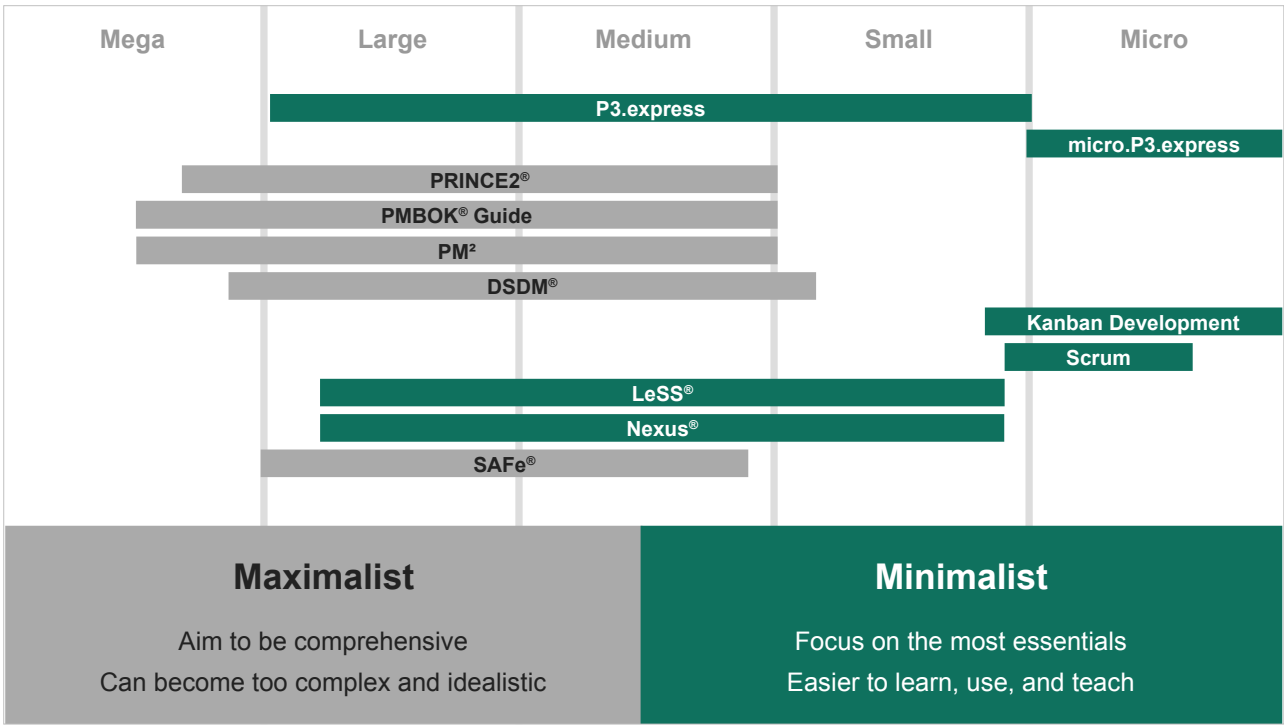


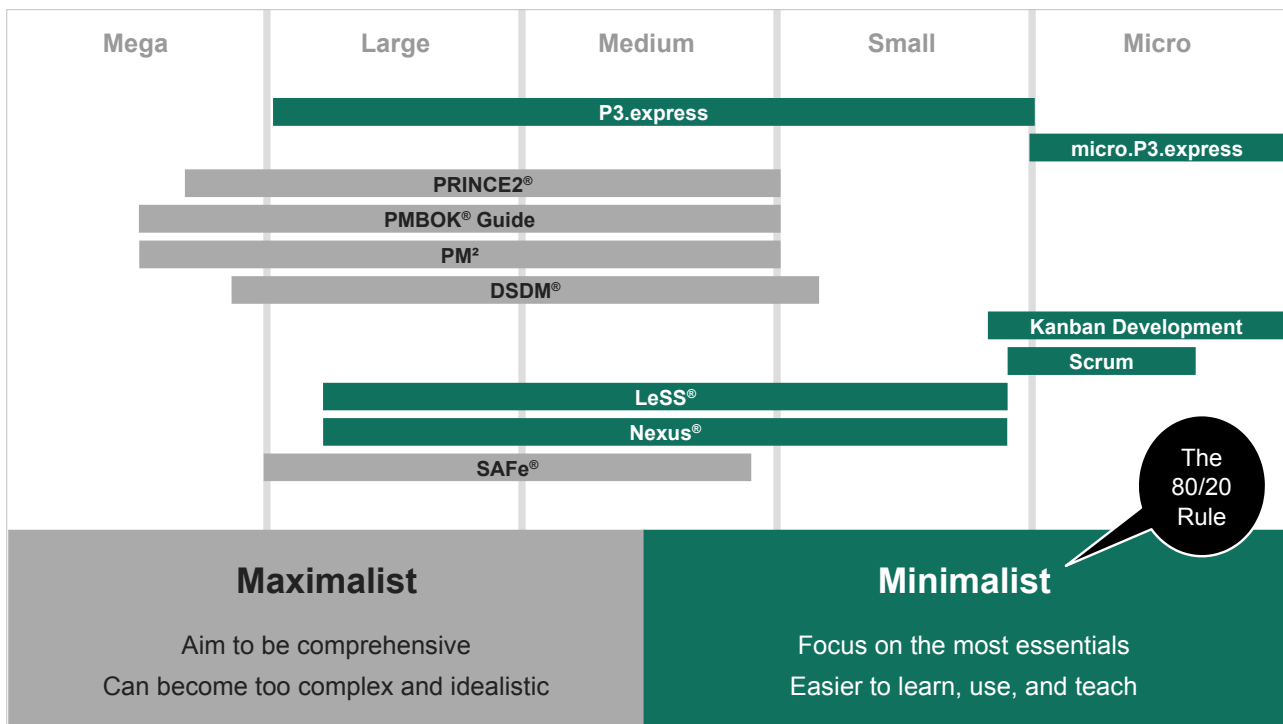


There's a lot of unfruitful debate about the meaning of the words "methodology" and "framework", which is why P3.express simply calls itself a "system" rather than a methodology or framework. It doesn't mean that using those words to refer to P3.express is wrong, but that P3.express wants to avoid unnecessary discussion and focuses on practical aspects.

On the other hand, some systems, such as PM², call themselves methodologies, whereas they are, in fact, guides. As a result, we've used the words "guides" and "road maps" to separate different types of systems. "Road map" is a relatively descriptive term that can be helpful.

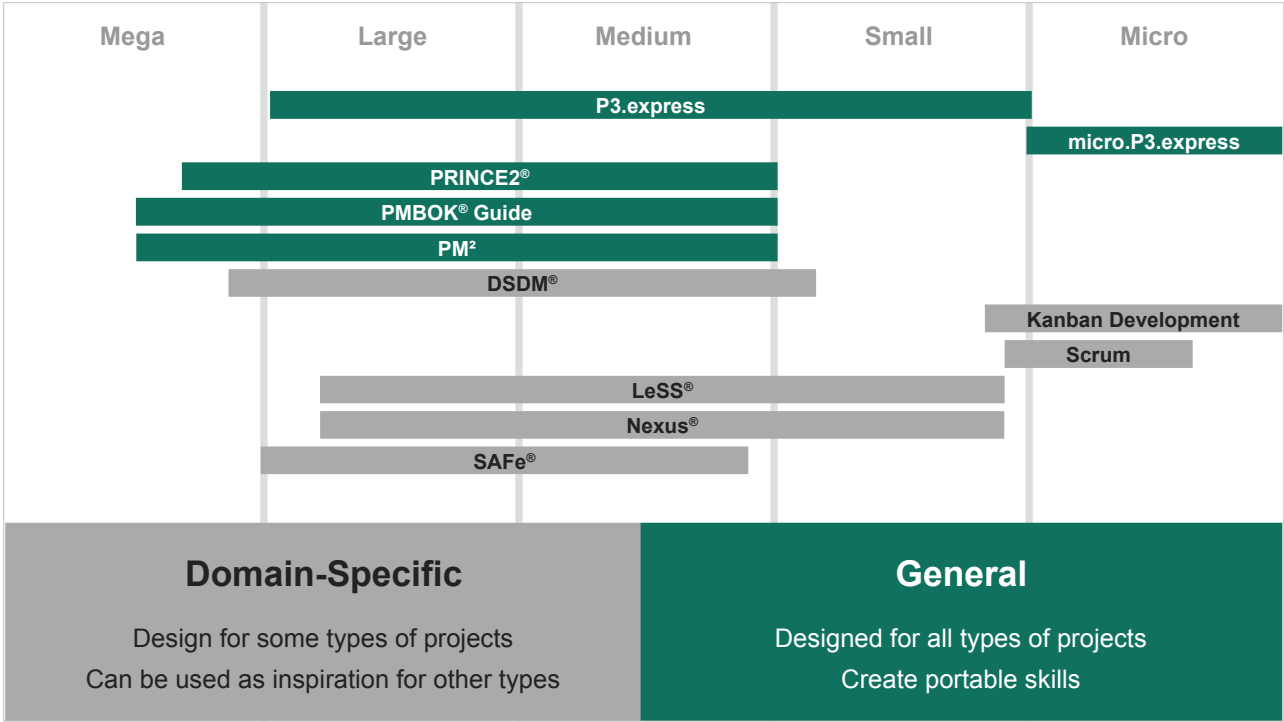
The most important message here is that when someone wants to improve how they run projects, they first need a methodology. After that, they can use a guide to enrich their methodology gradually. Some people misunderstand this concept and try to "implement" some of those guides, which never works well.

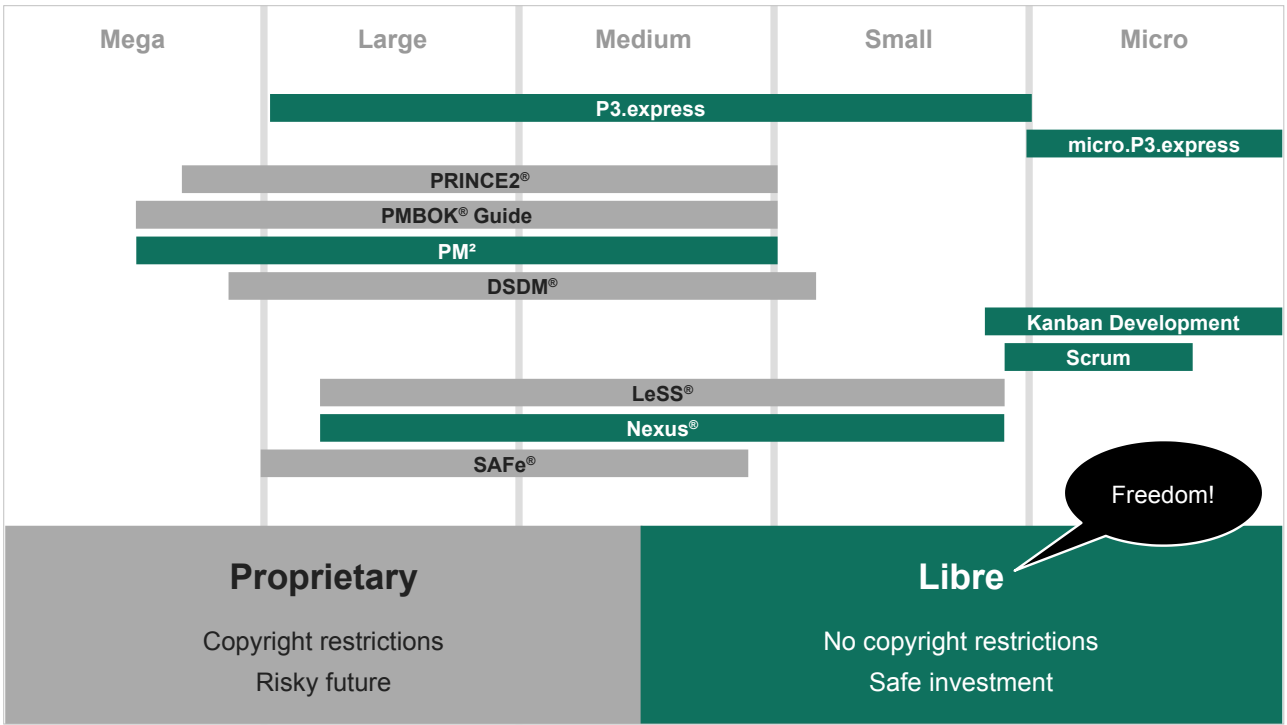


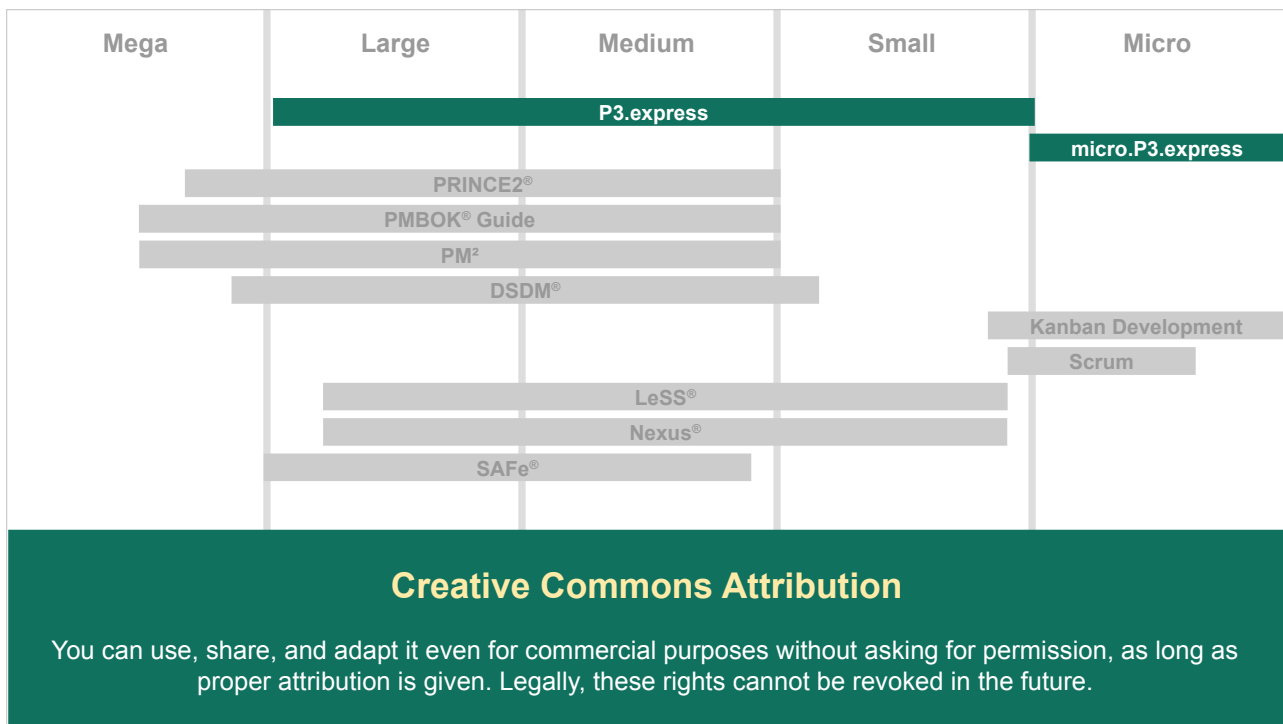


Instead of trying to target 100% of the potential benefits of structured project management with 100% of the effort, we aim to get 80% of the benefits with 20% of the effort.

A common misconception is that in doing so, we'd lose 20% of the potential benefits, but in the real world, people who aim for 100% usually end up with such a complicated and unrealistic system that they end up gaining 0% of the structured system! So, the choice, in most but not all cases, is between 0% and 80% rather than 80% and 100%.



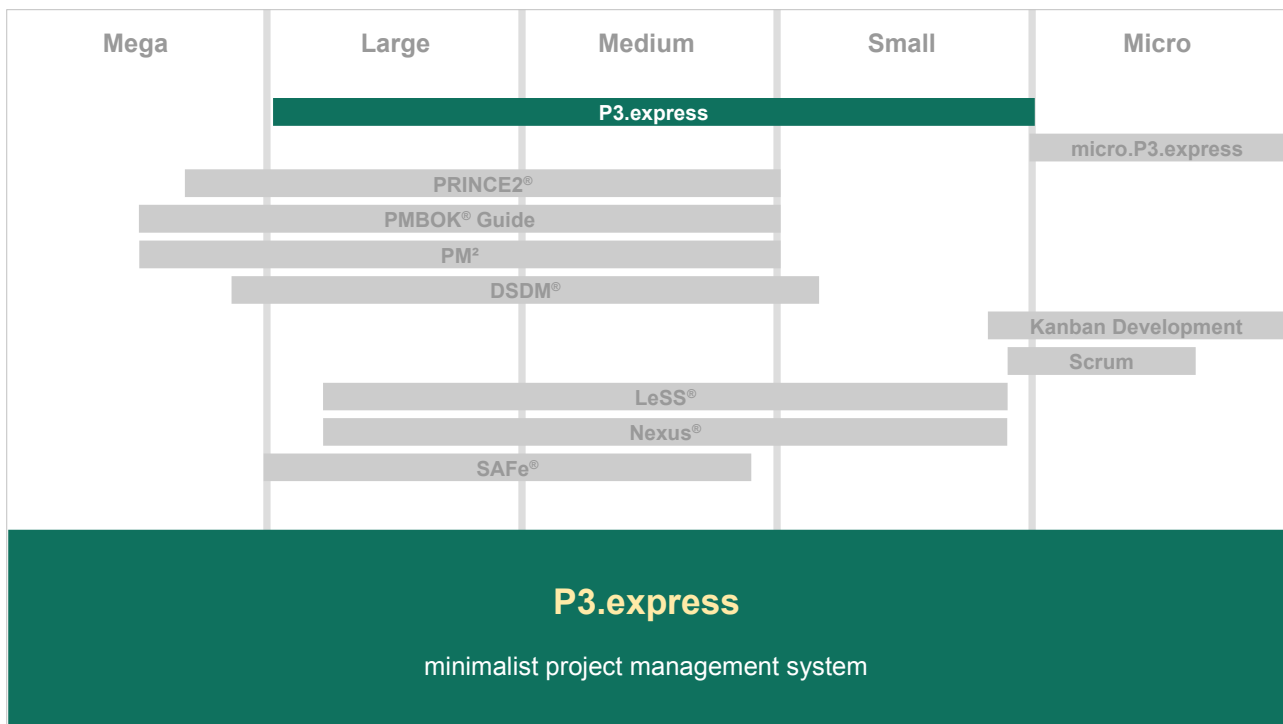




Here are a few examples of what your audience can do with P3.express:

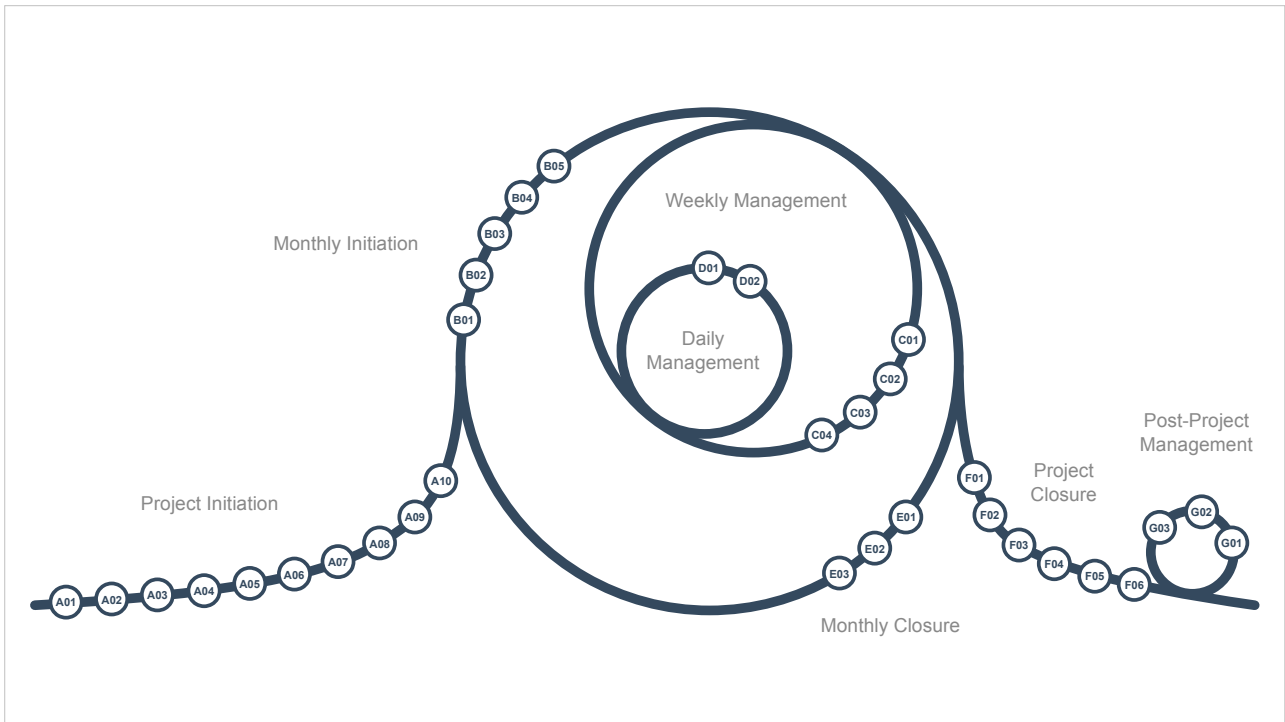
- (1) They can create a customized version of P3.express for a specific industry, give it a name, and start selling it to corporate for millions. This is allowed, and they don't even have to ask for permission; all they have to do is give proper attribution (say that it's based on P3.express).
- (2) They can build a training or consultancy service based on P3.express and sell their services to organizations.
- (3) They can write a book about it and publish it without seeking permission.

It's also important to know that based on the CC-BY license, these rights cannot be revoked in the future; therefore, their investments remain safe. If you like, you can give them examples of how proprietary project management systems have caused problems for various users in the past few years.



Let them know that this course is about P3.express and doesn't cover micro.P3.express.

When learning it, your audience would imagine various project scenarios, and in doing so, they shouldn't think about micro- or mega-projects because P3.express should not be used in those cases without serious customization. They should imagine small, medium, or large projects.



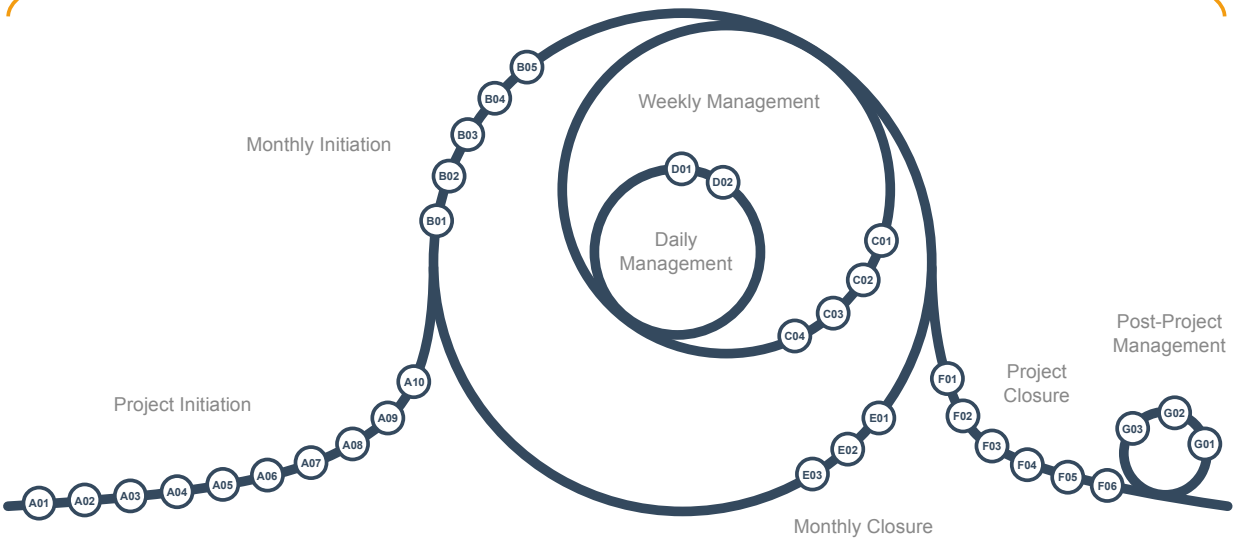
Giving them a large (A3) printed version of the diagram is a good idea. Slides that relate to single P3.express activities have the activity code in one of their corners but not the name, so having a printed version of the diagram with names would help.

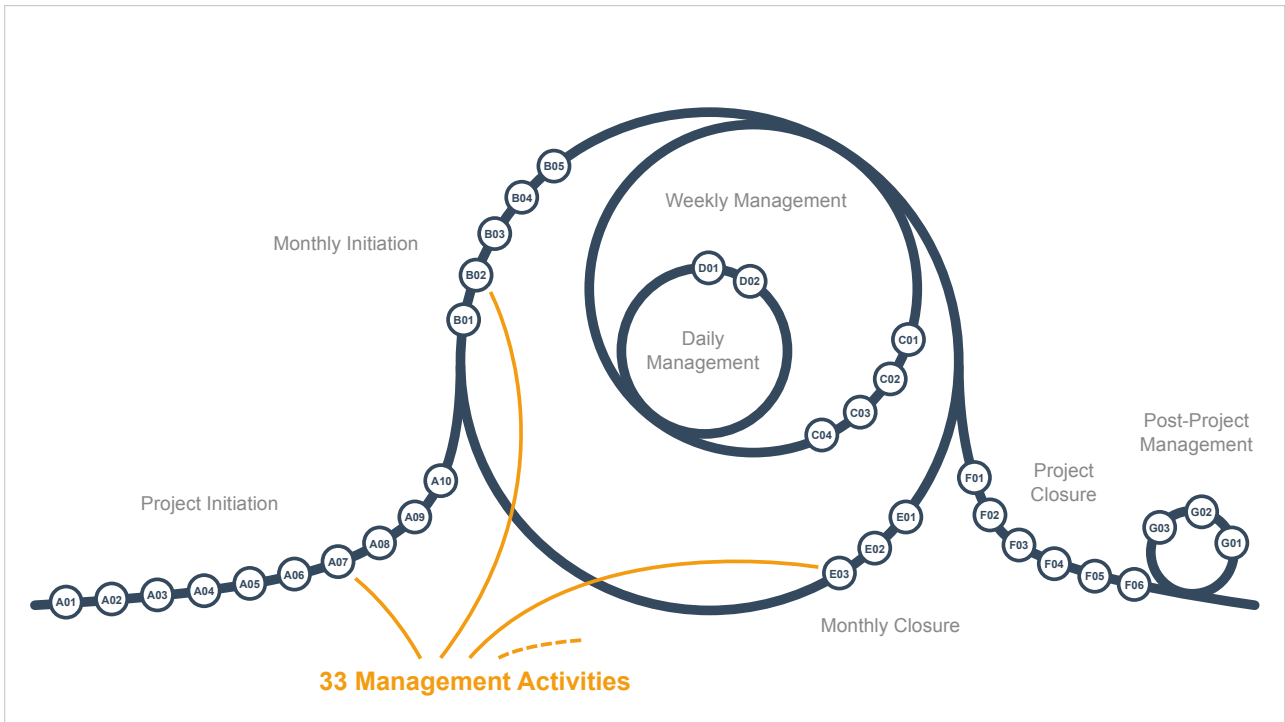
You can download the diagram from any of the manual pages on the website. Here's the direct link for the English version:

<https://p3.express/manual/v2/p3.express-diagrams-en.zip>

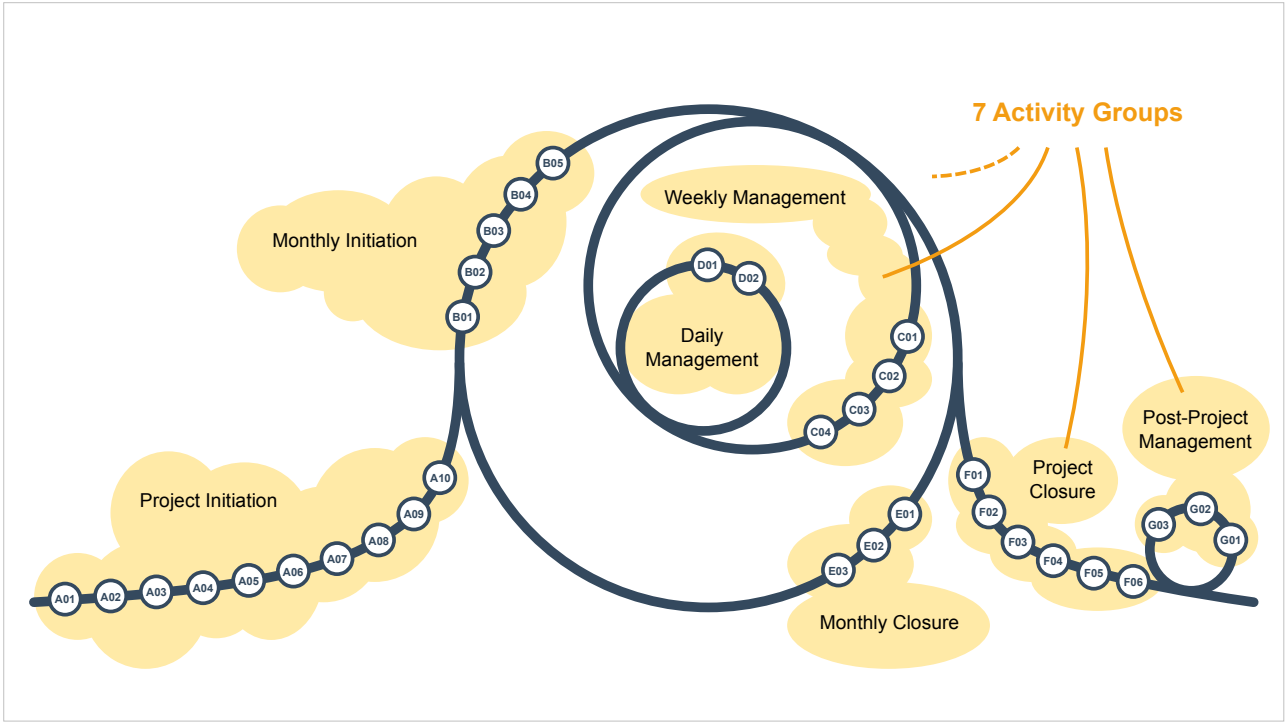
(Use the "poster" version that contains the activity names.)

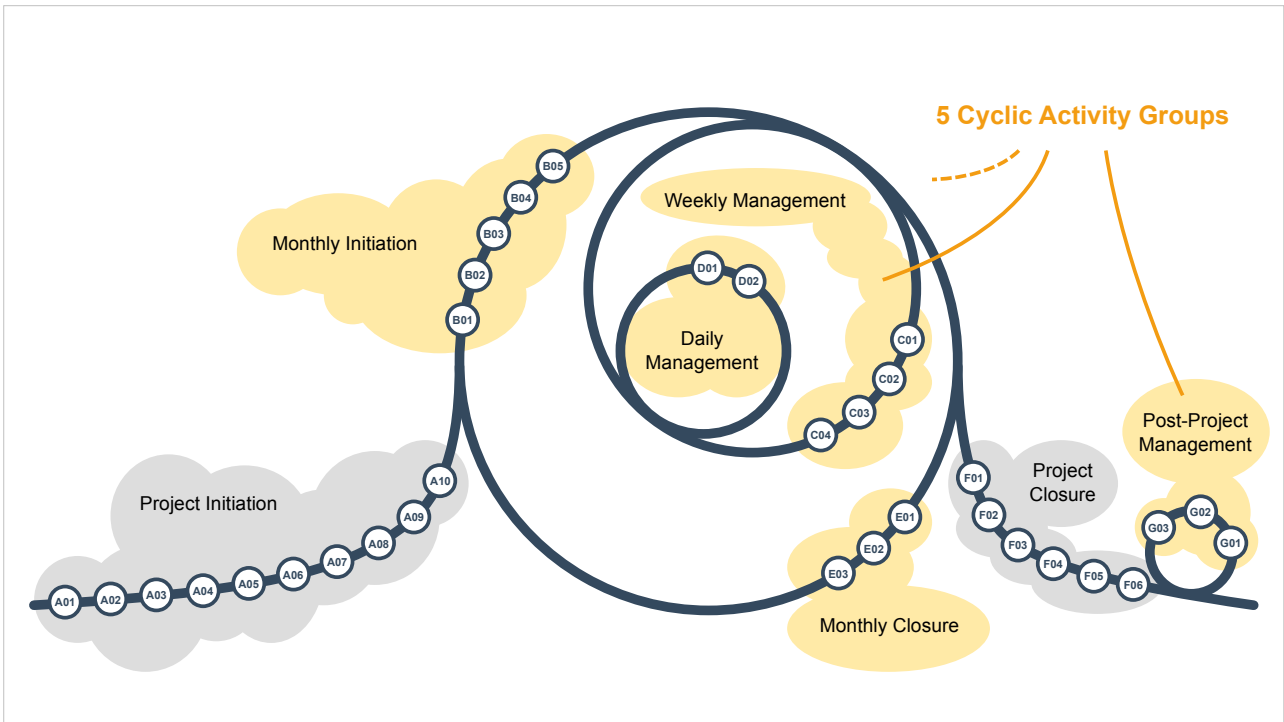
The Process



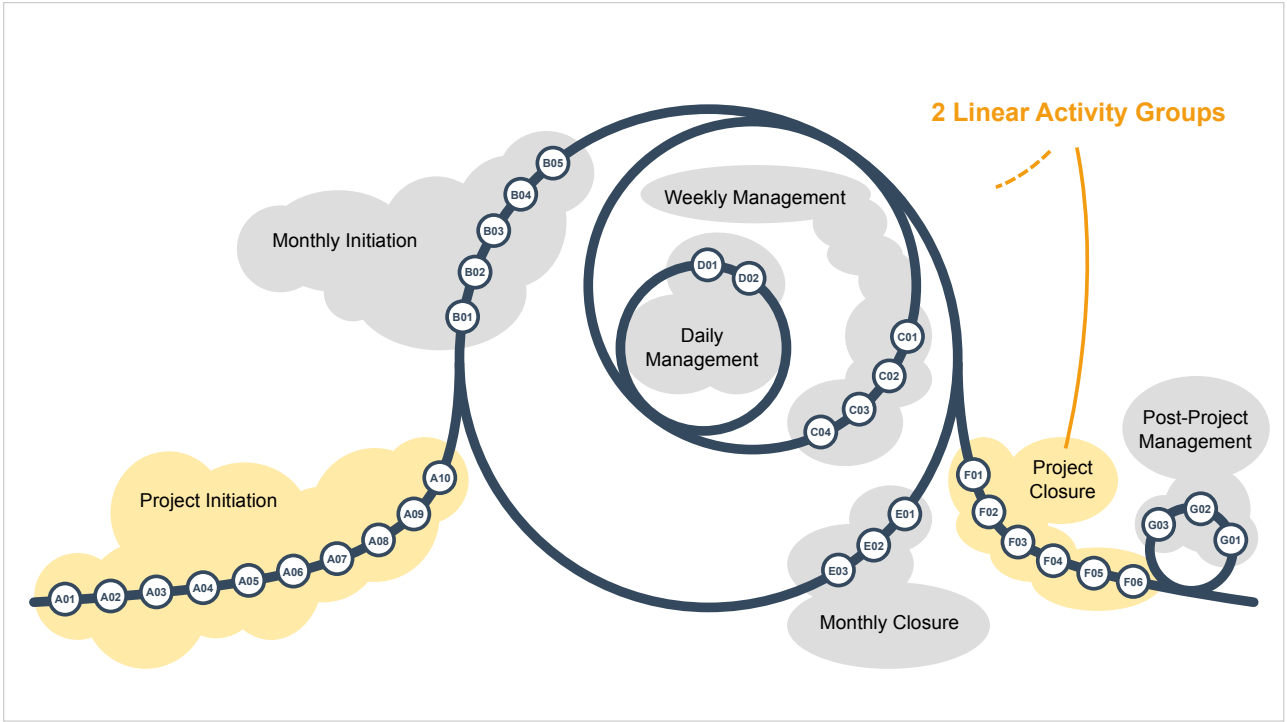


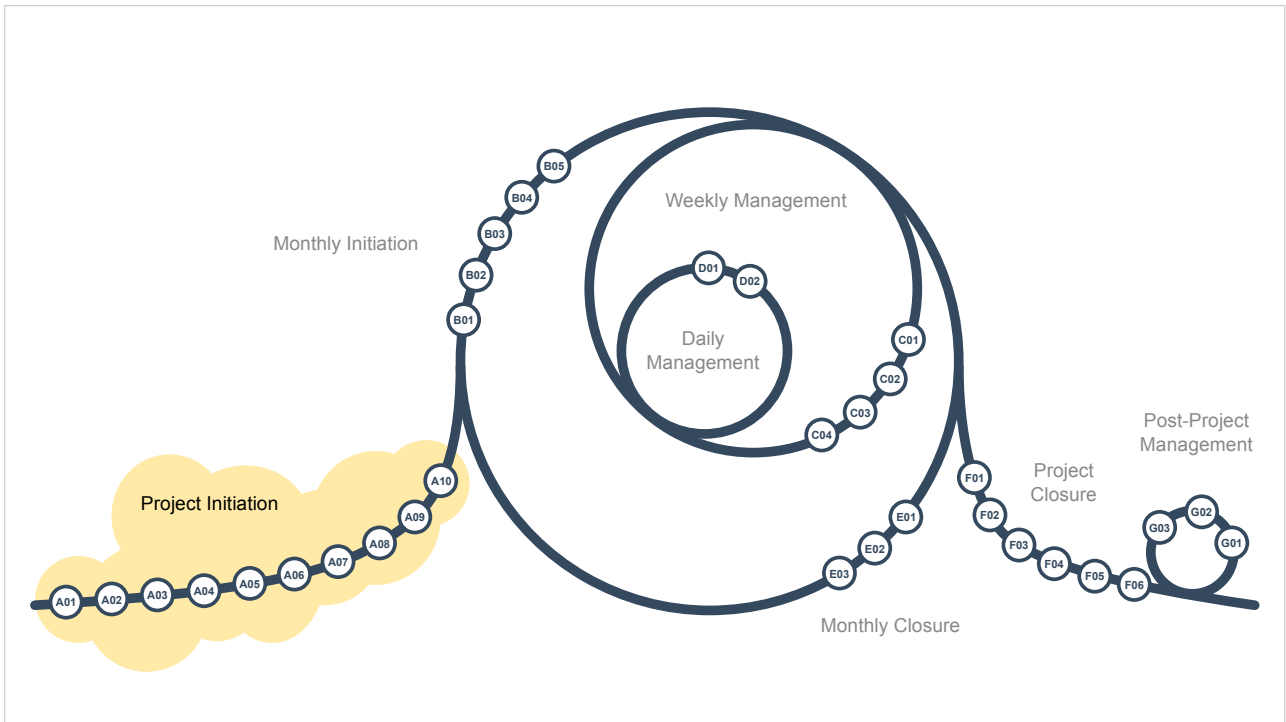
Remind them that P3.express is only about project management activities and doesn't cover technical activities. Also, for the management activities, it only contains those that need to be structured rather than every possible management activity.



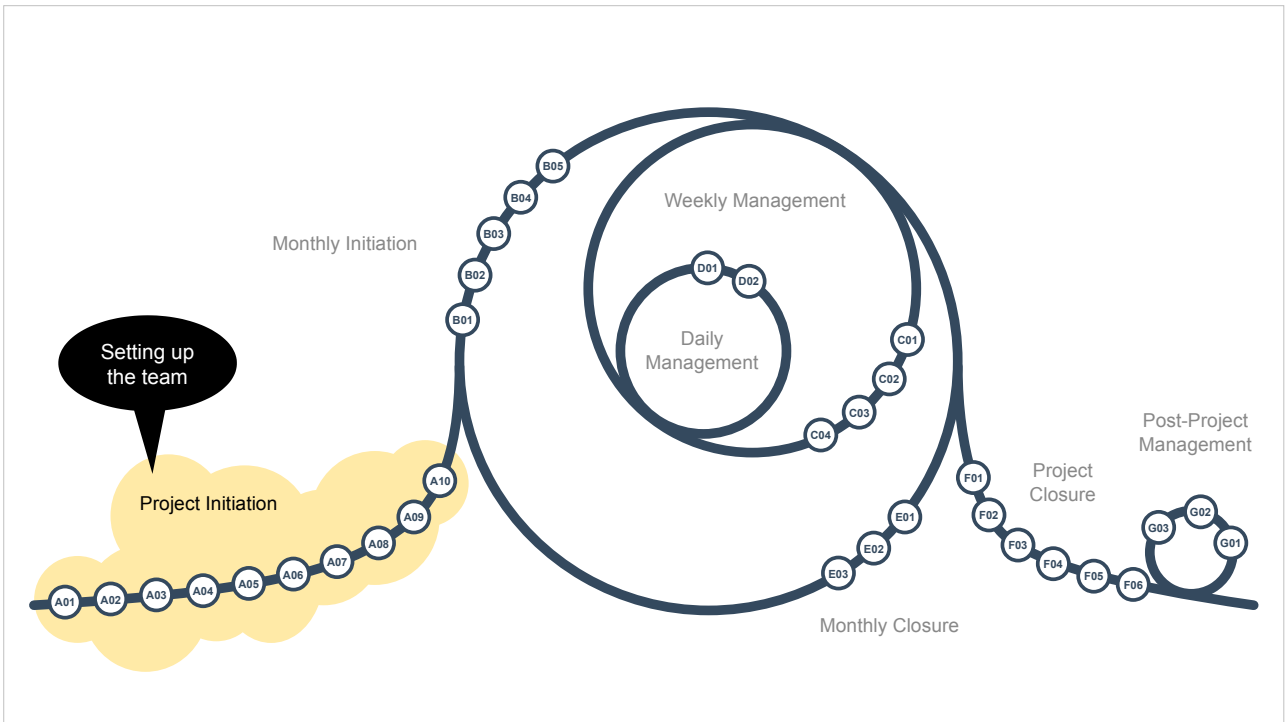


Technically, these can be called “iterative” as well, but we prefer to call them cyclic because “iterative” is usually used to refer to cyclic technical activities (e.g., in Agile approaches) and may create confusion for some people.

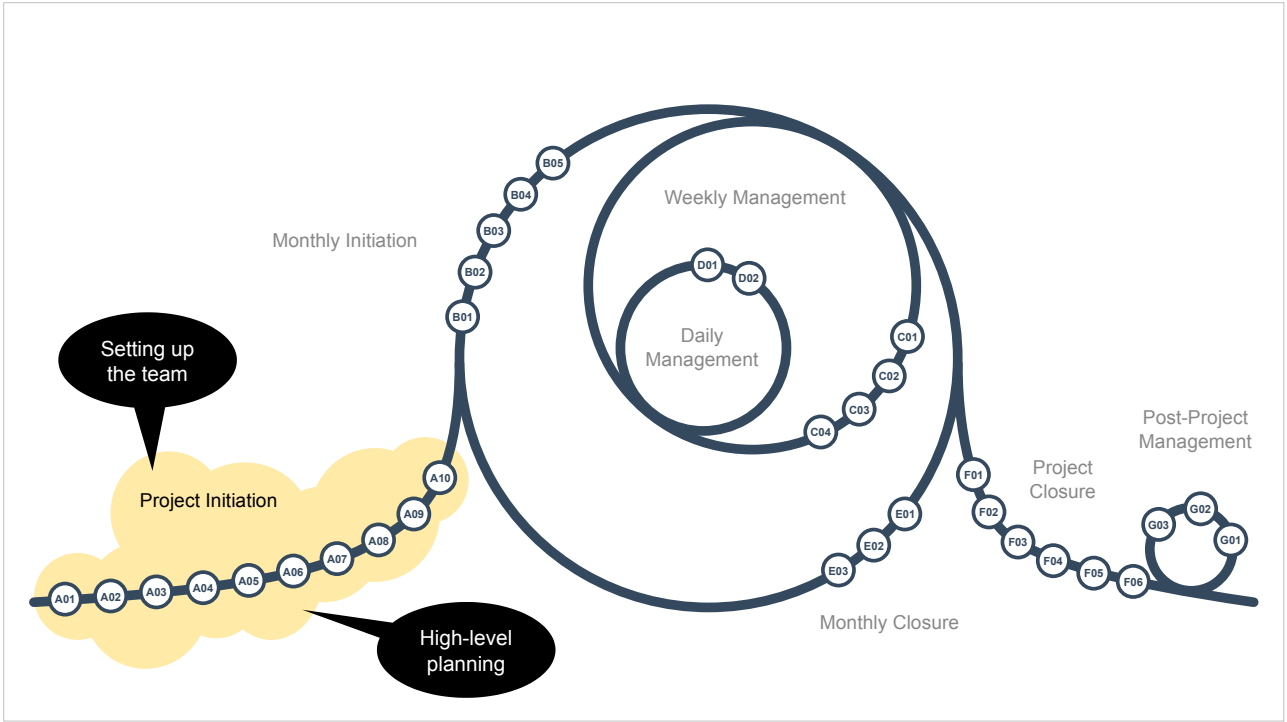


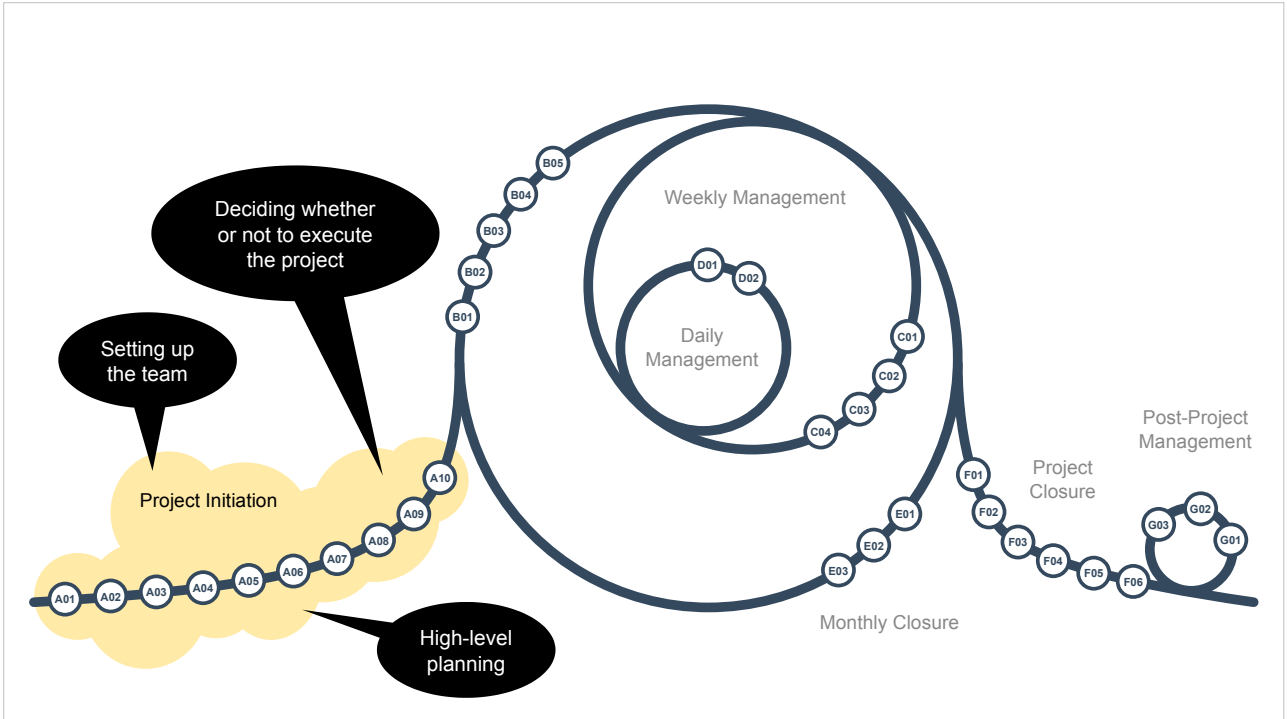


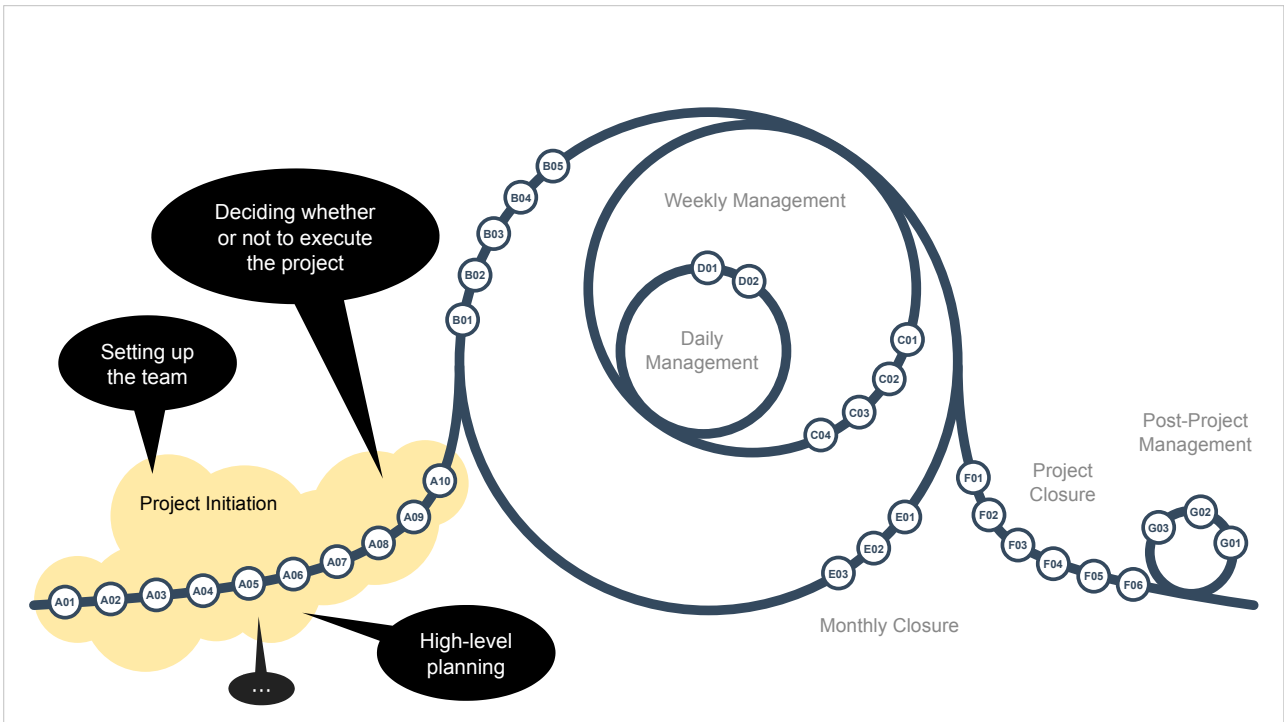
Make sure you always refer to it as “project initiation” rather than “initiation” because we have two initiation activity groups.



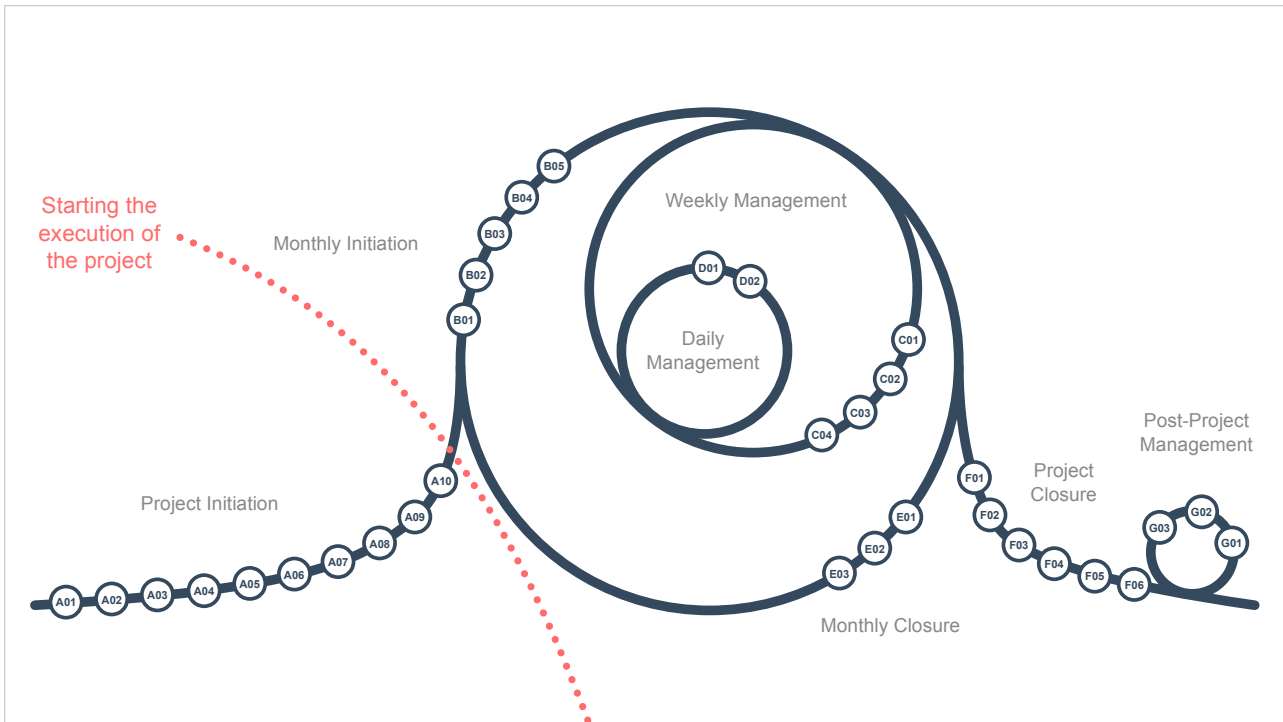
It's only the key team members rather than all team members: those we need to properly initiate the project.





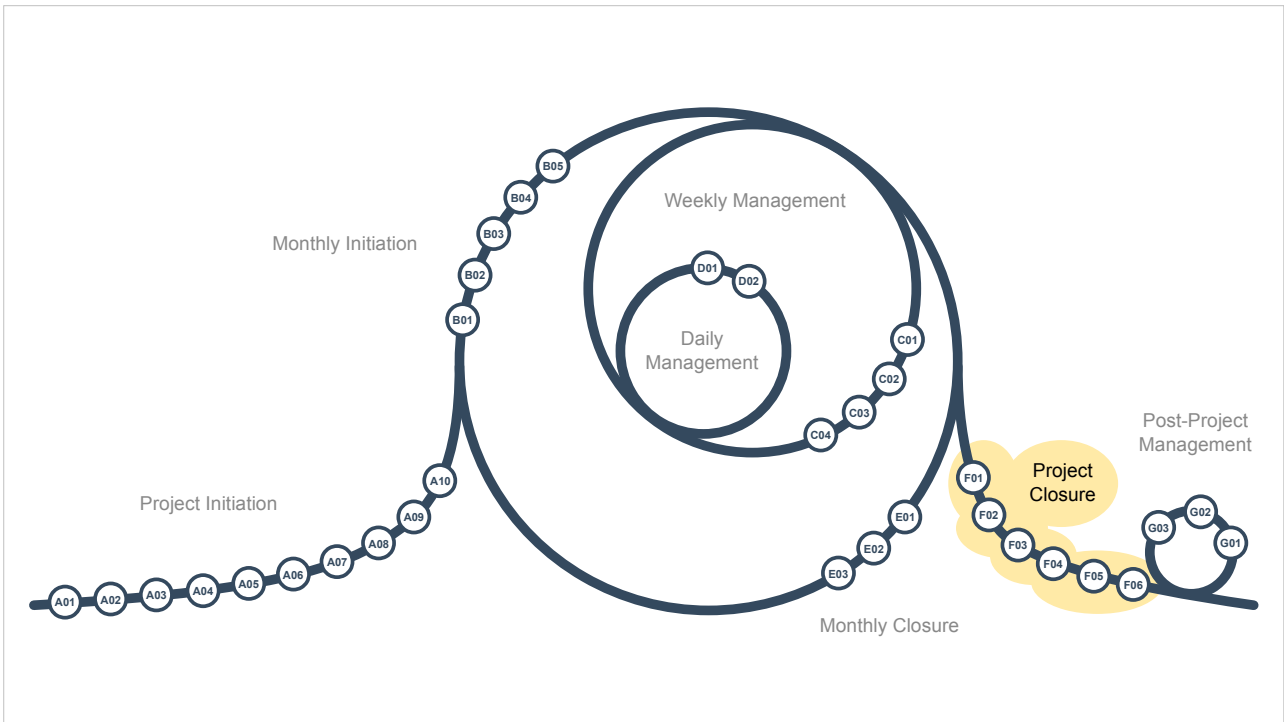


The black speech bubbles with ellipsis mean “etc.”. You don’t have to tell them about the rest, but ensure they know there’s more to it.

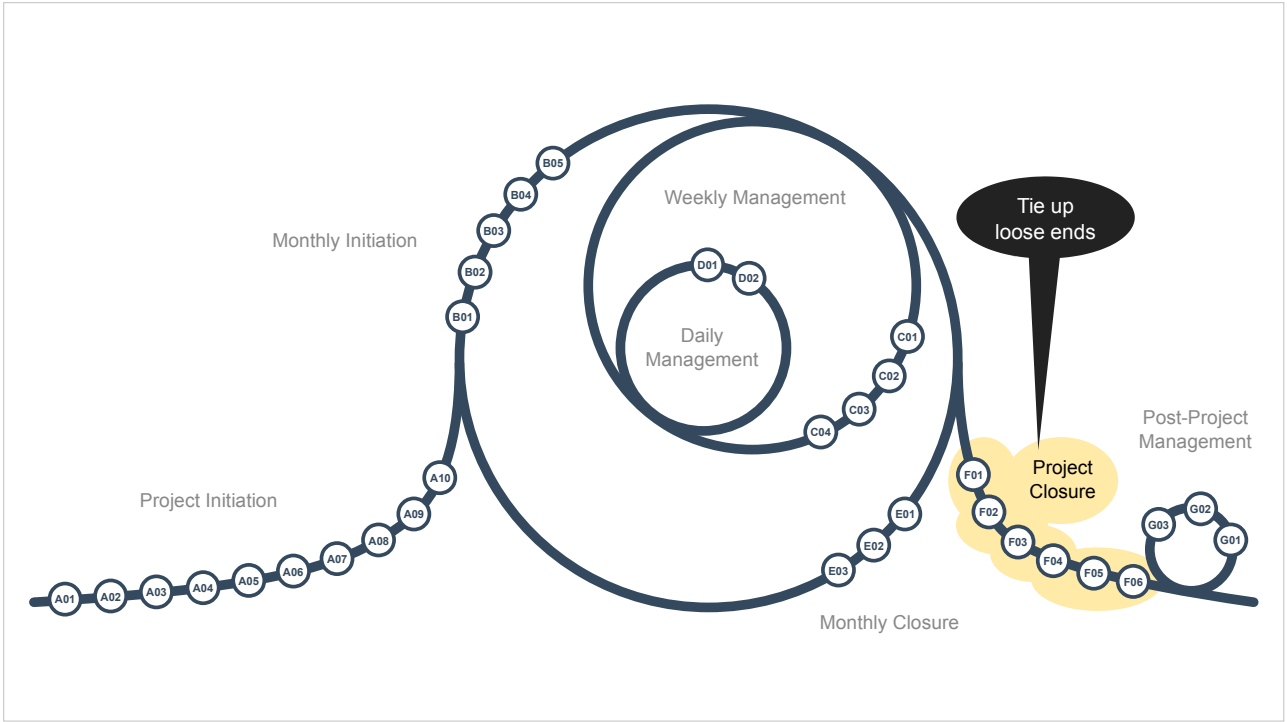


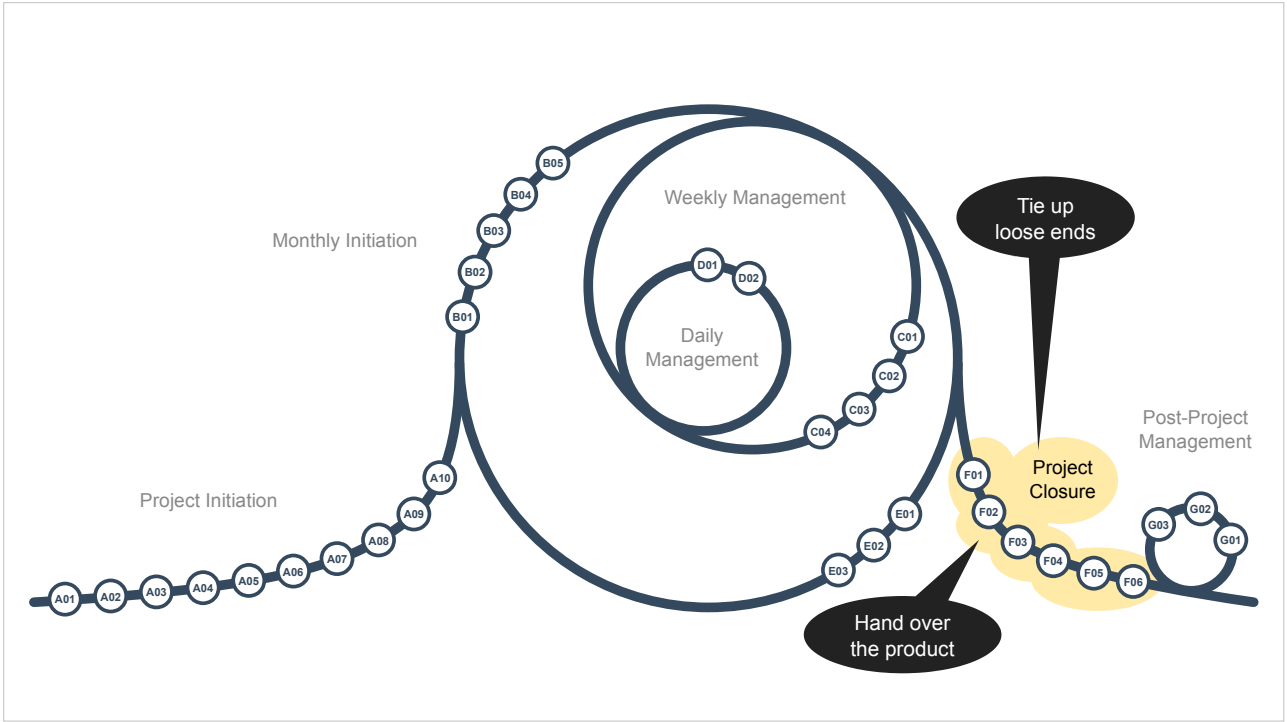
Sadly, most project journeys start after Project Initiation, which is a major source of problems.

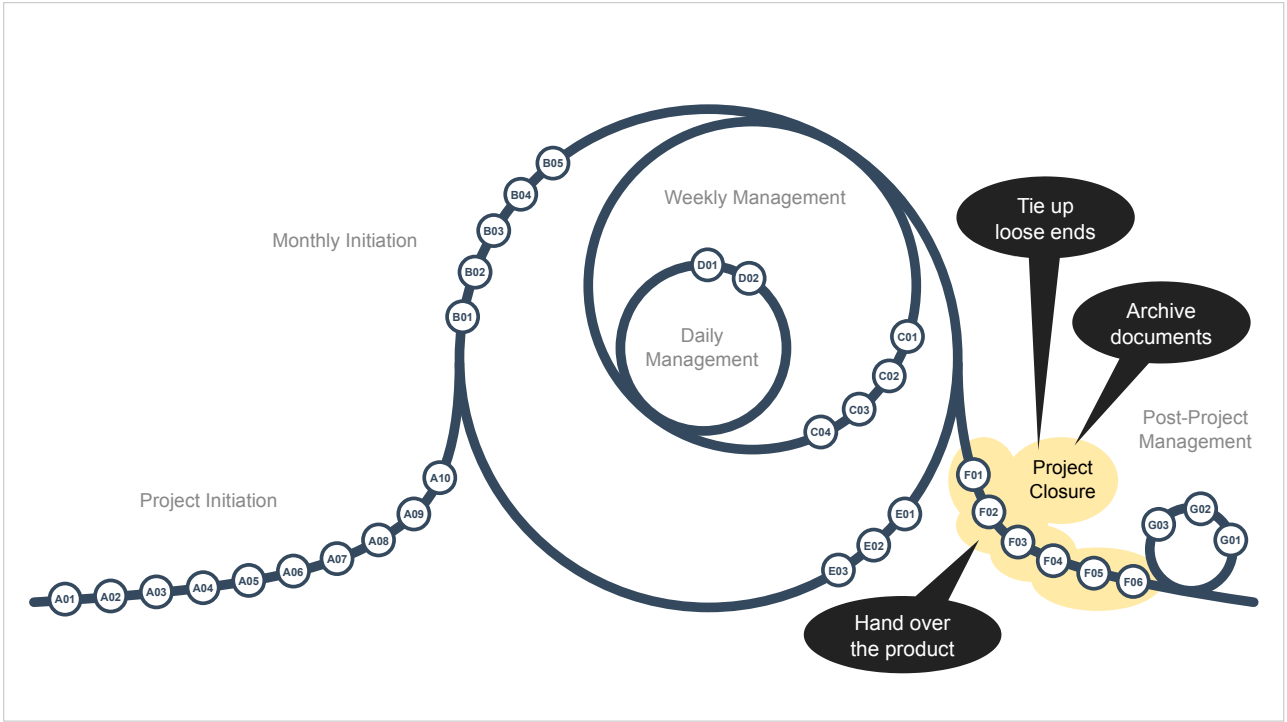
If they have no say in it and will always be involved after this point, they still have to pause and complete project initiation before proceeding. It won't be perfect, though, because the decision for executing the project is already taken (e.g., the contract with an external customer is signed).

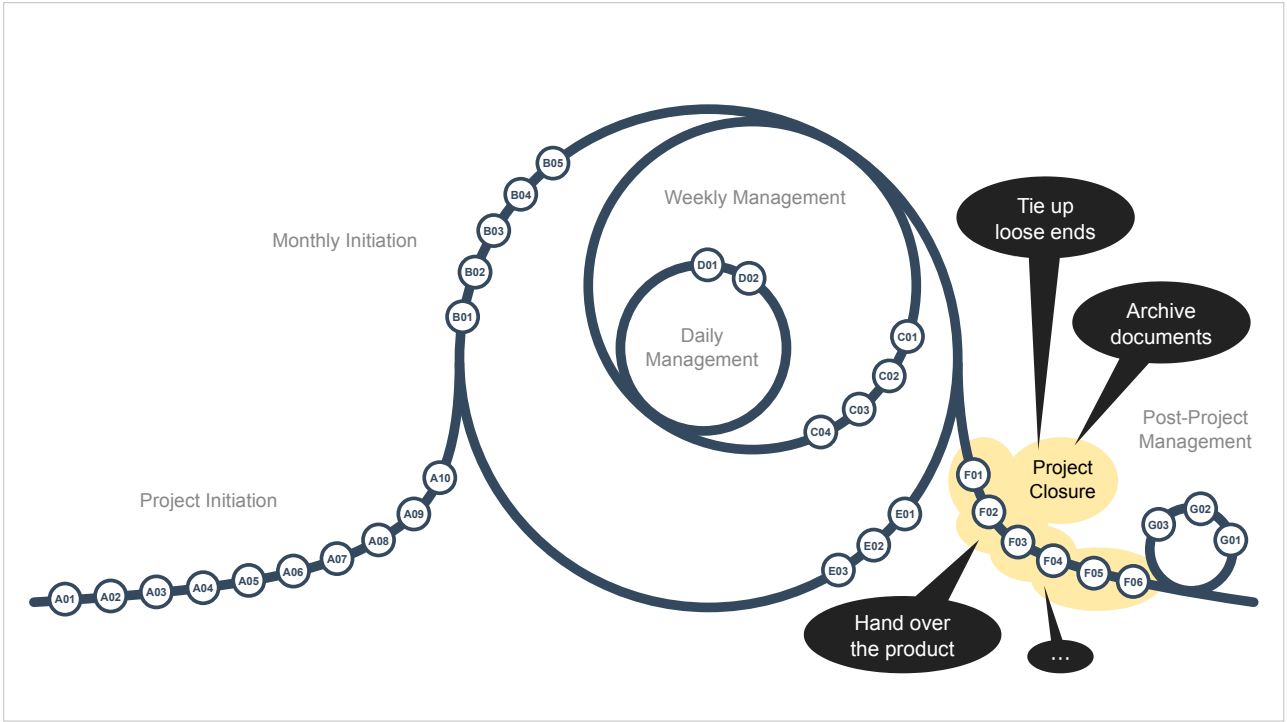


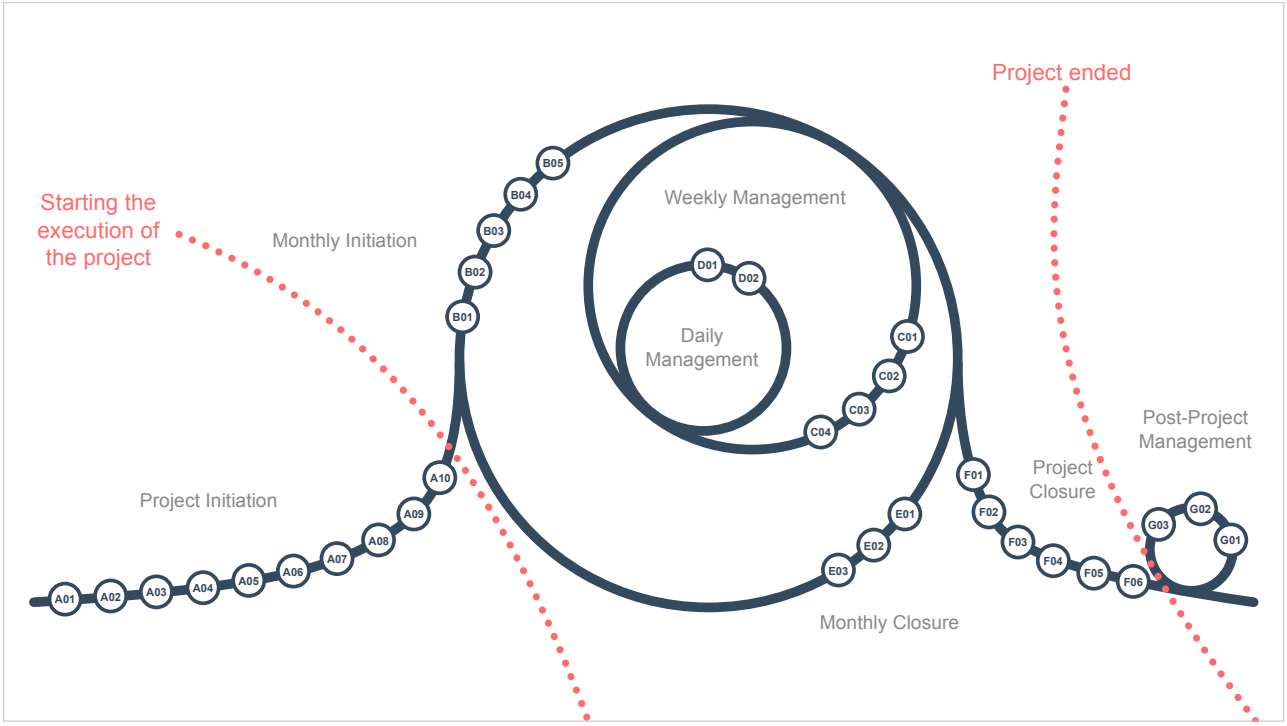
In the same way we prepare for the project in project initiation, we tie up the loose ends and prepare for closing it in project closure.

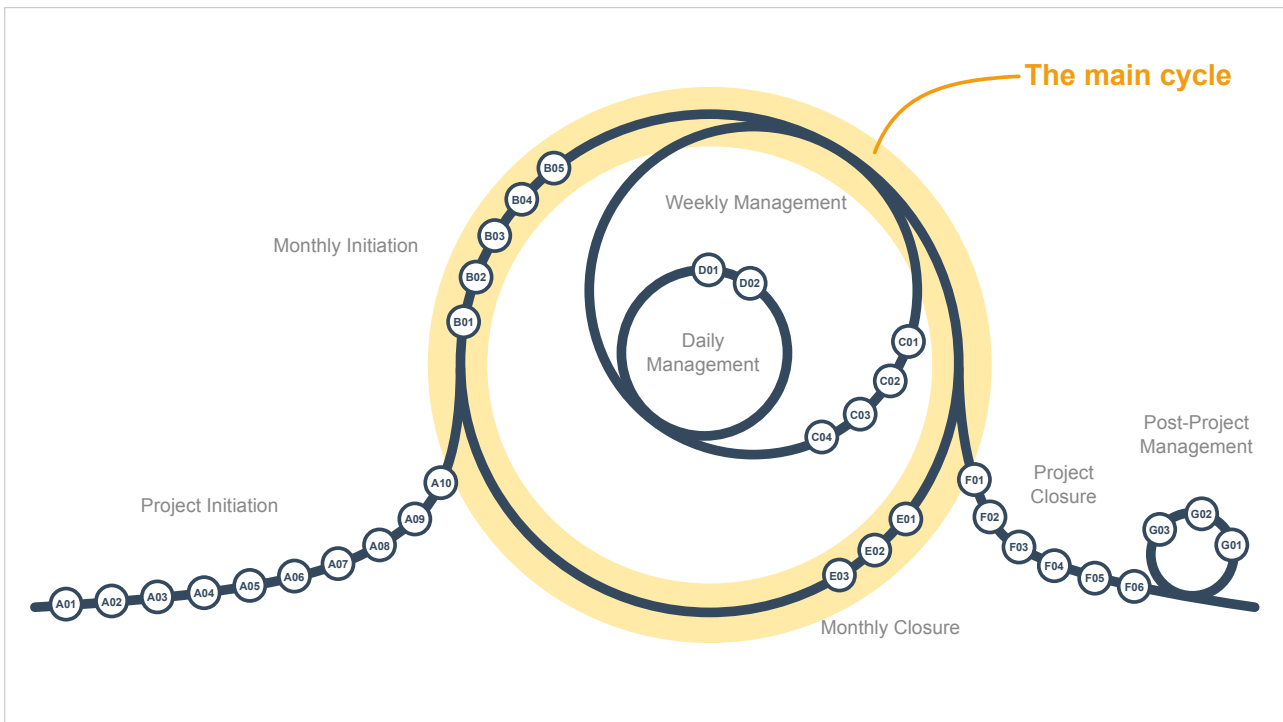






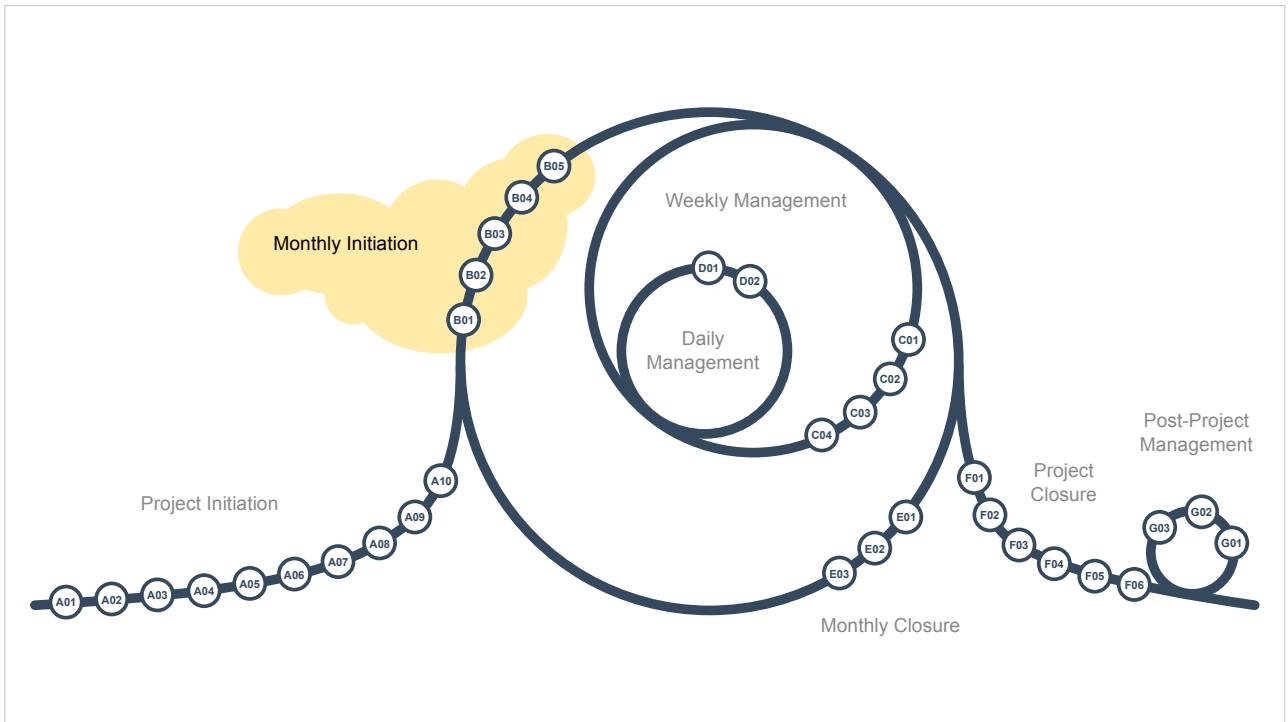




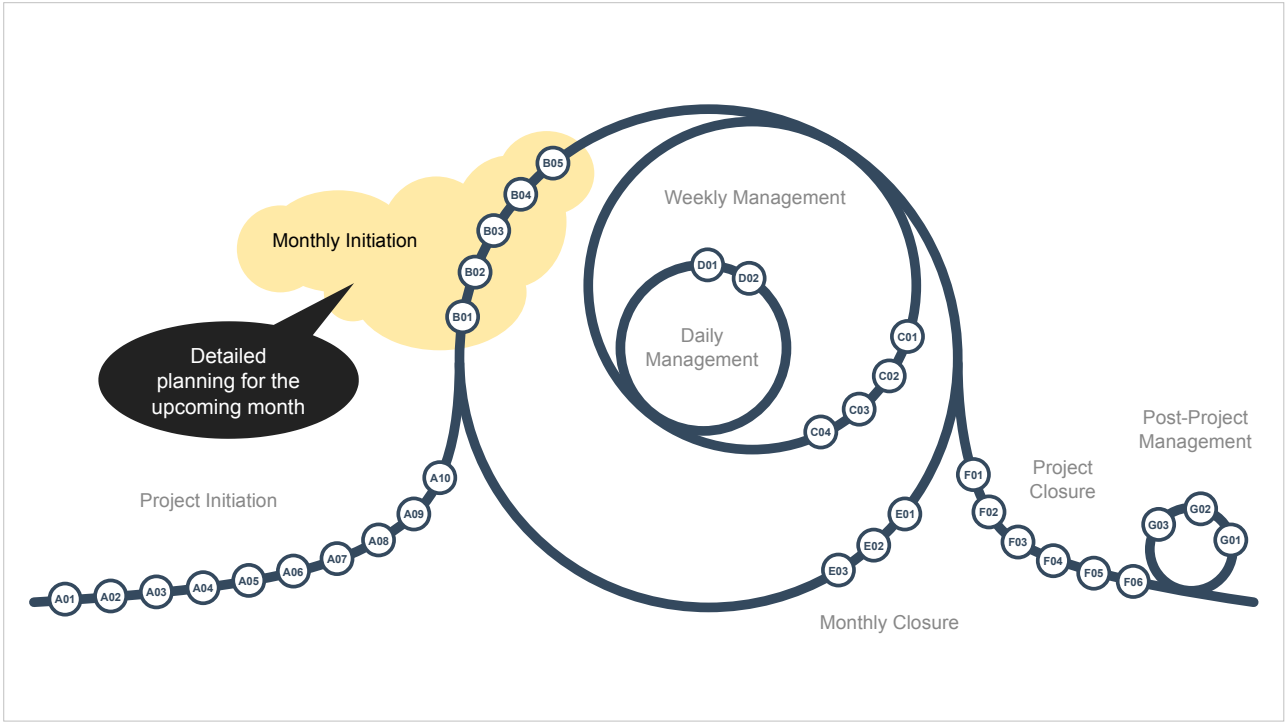


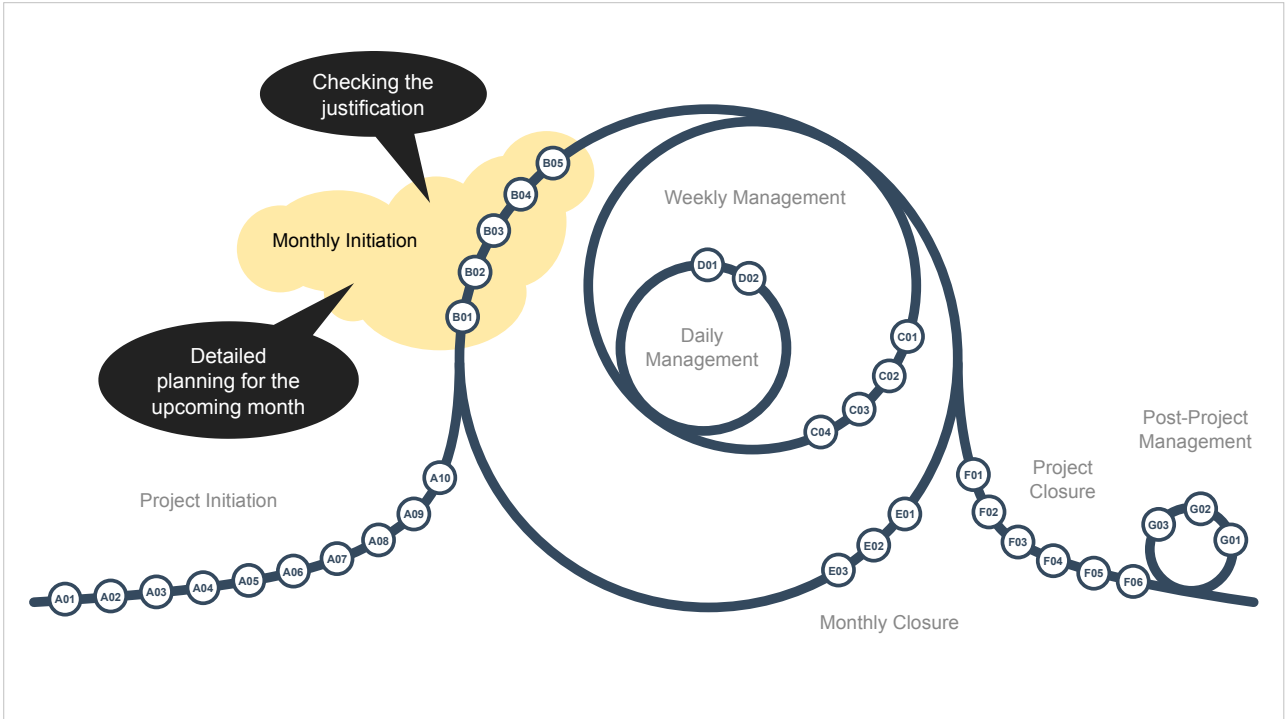
The main cycle is fixed as a monthly one. Using calendar months is the easiest. If there are multiple projects with shared resources, they may prefer to start their cycles at different times (e.g., one on the first day of the month and the other in the middle of the month) to spread their project management load.

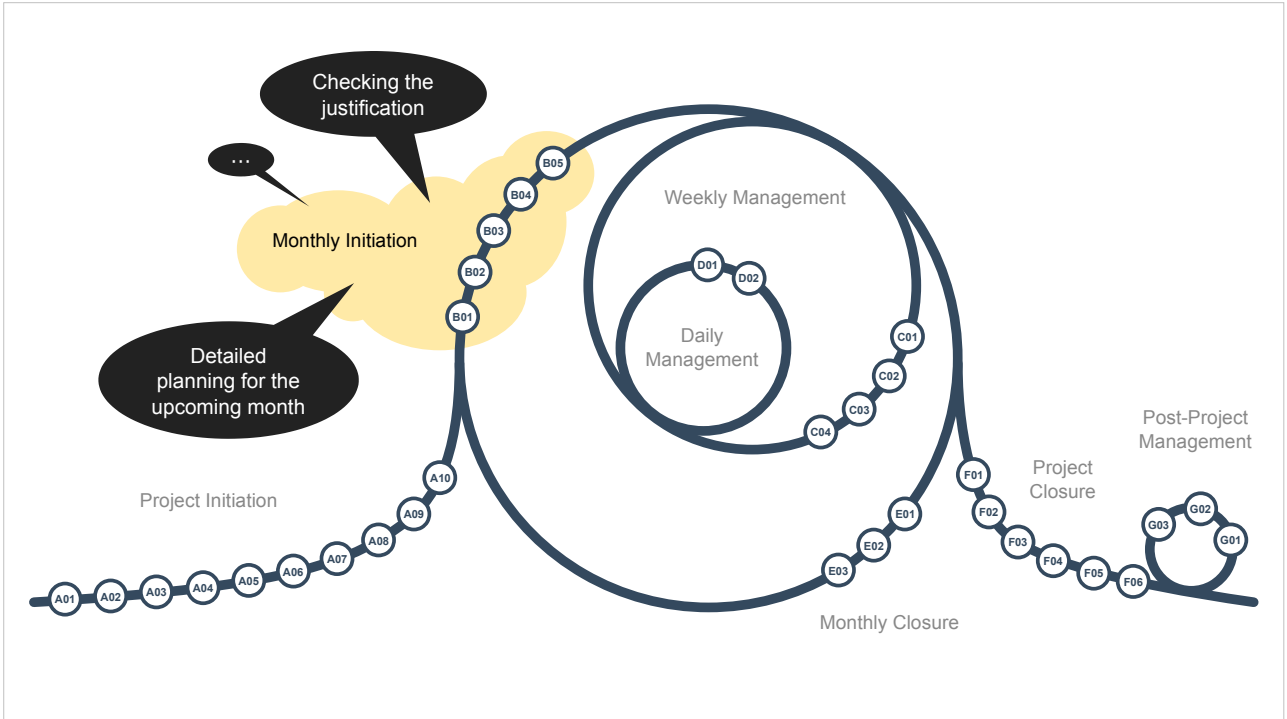
The execution of a project may start in the middle of the desired cycle, in which case, it can either have a shorter first cycle or its first two cycles can be merged into one.

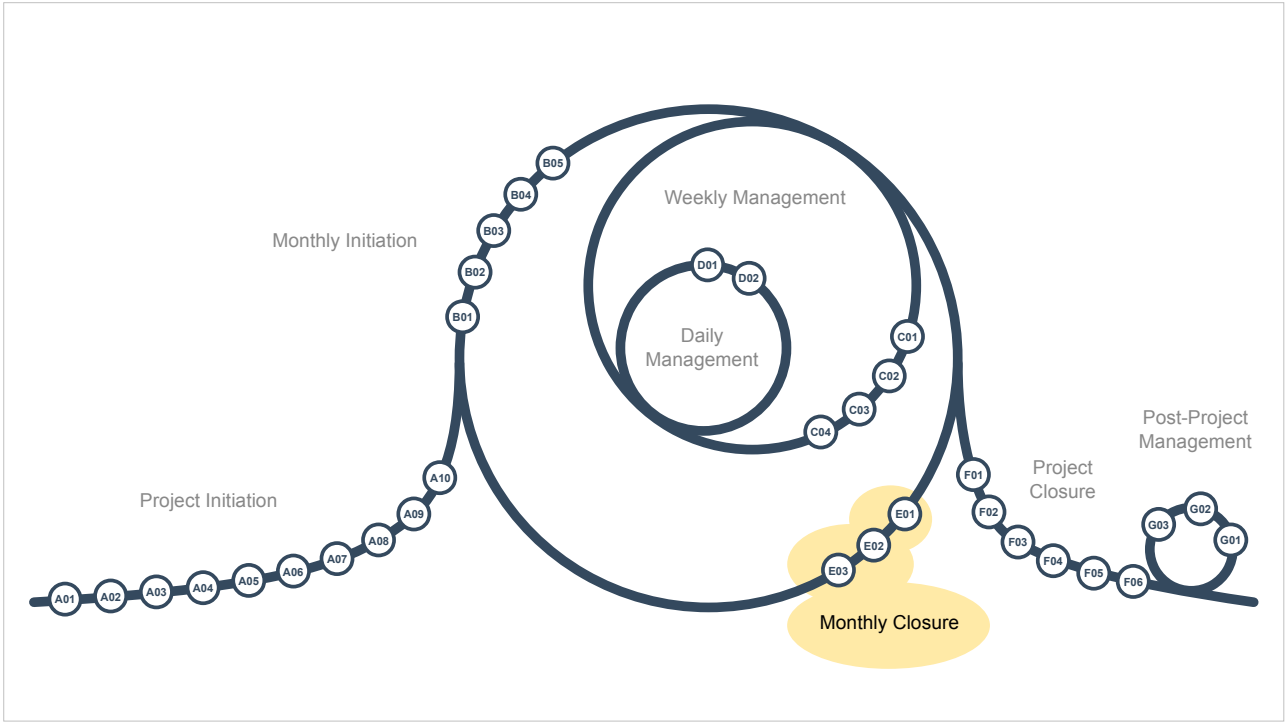


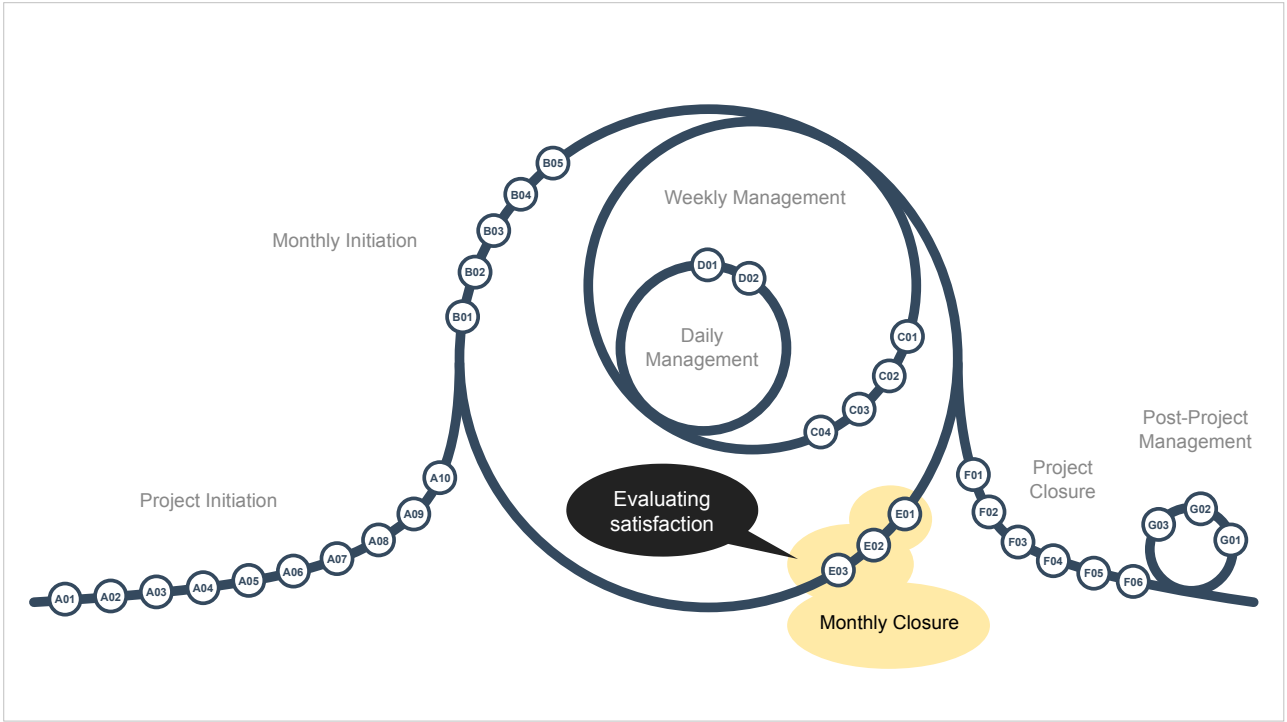
In the same way we initiate and close the project, we also initiate and close every monthly cycle.

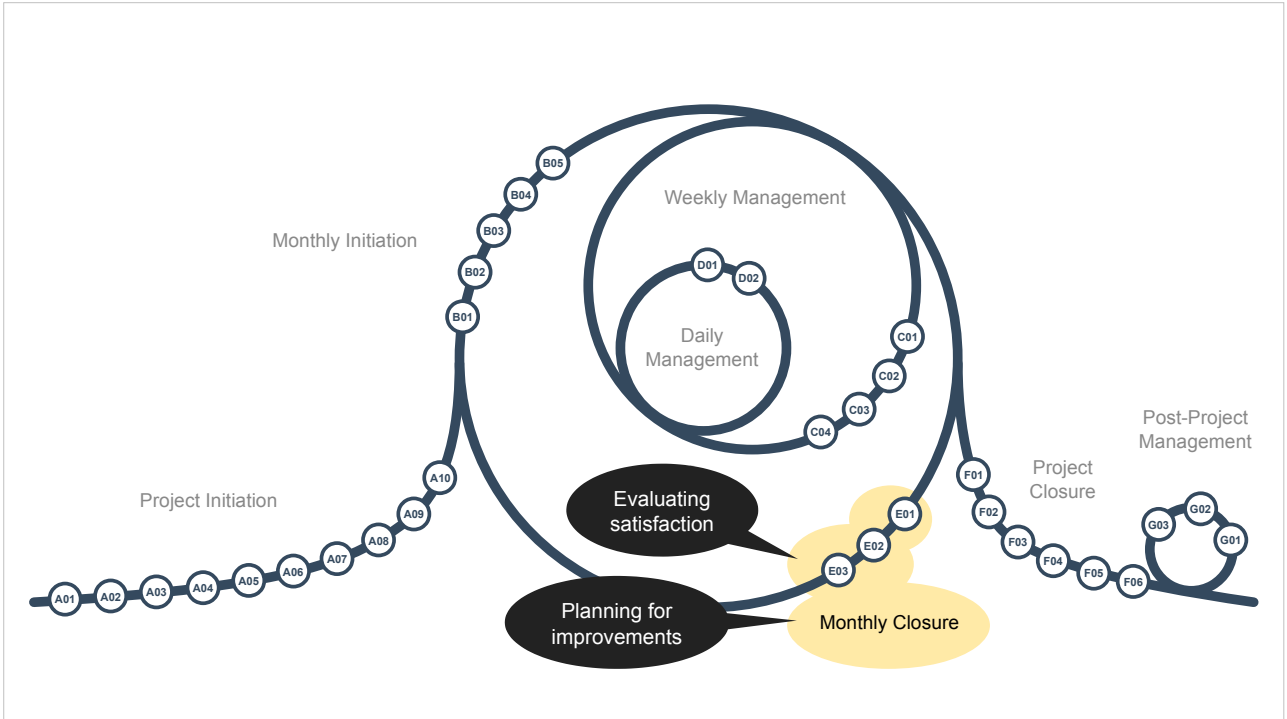


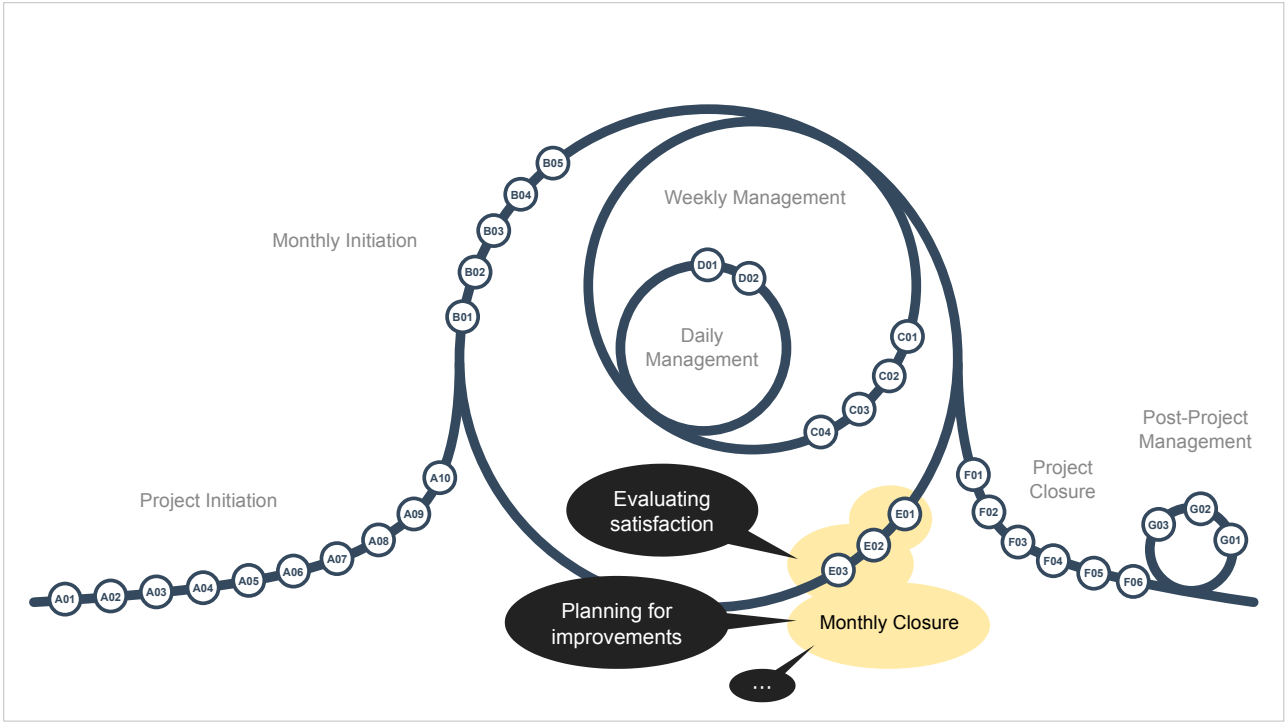


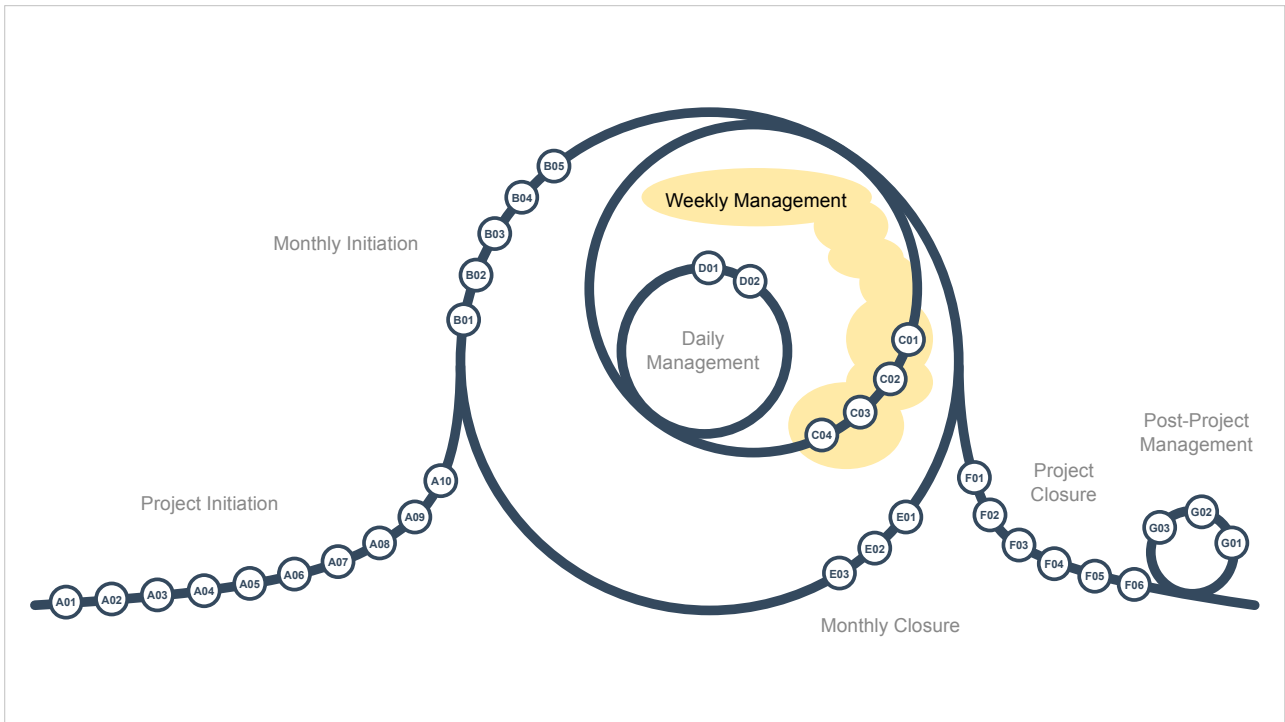




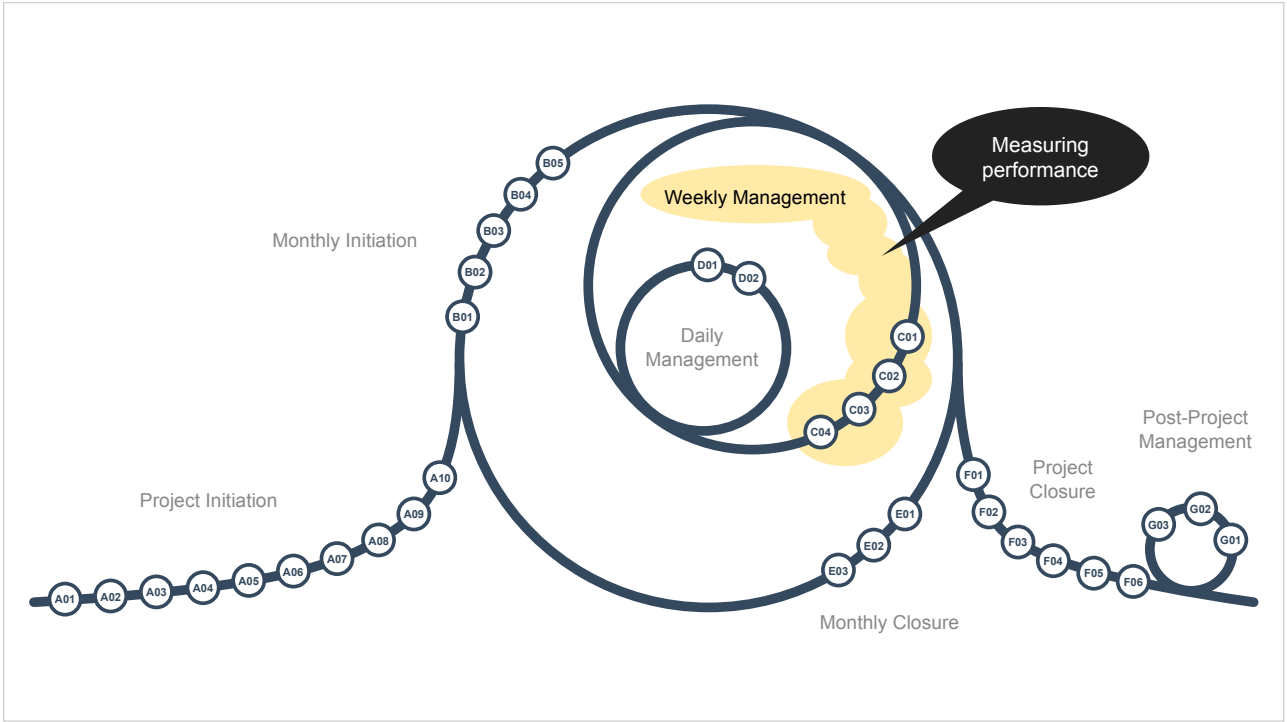


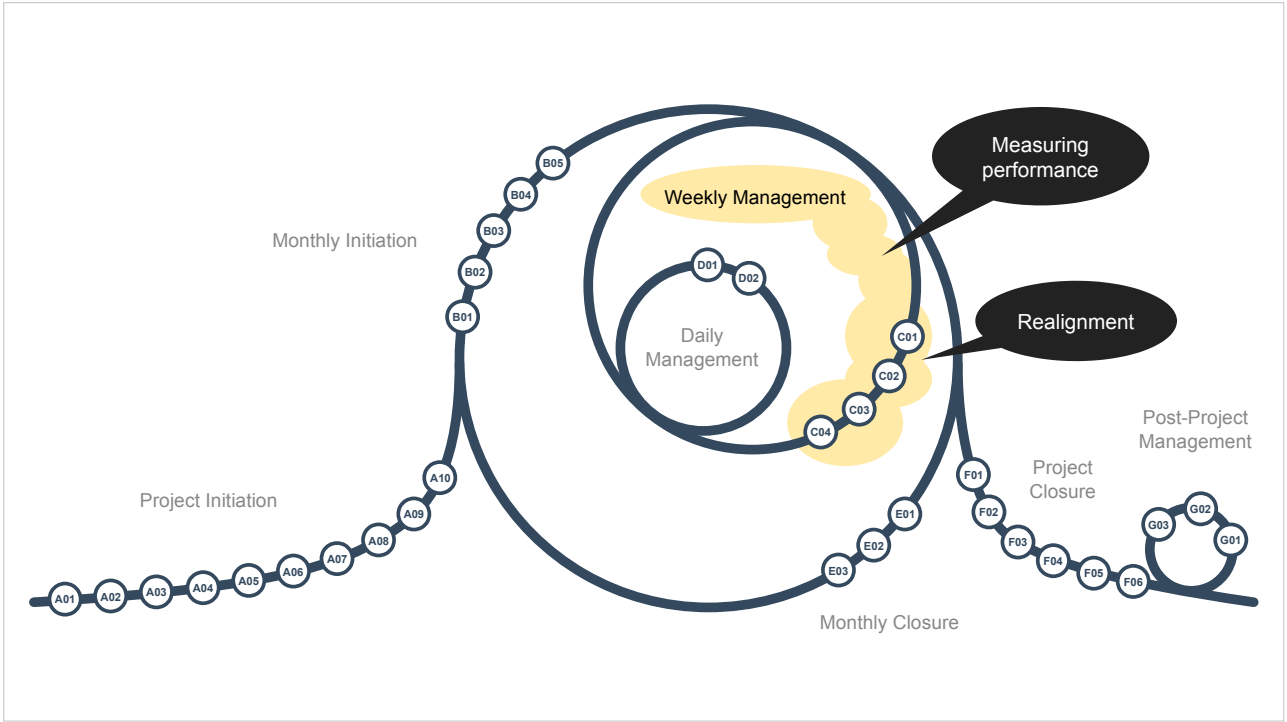


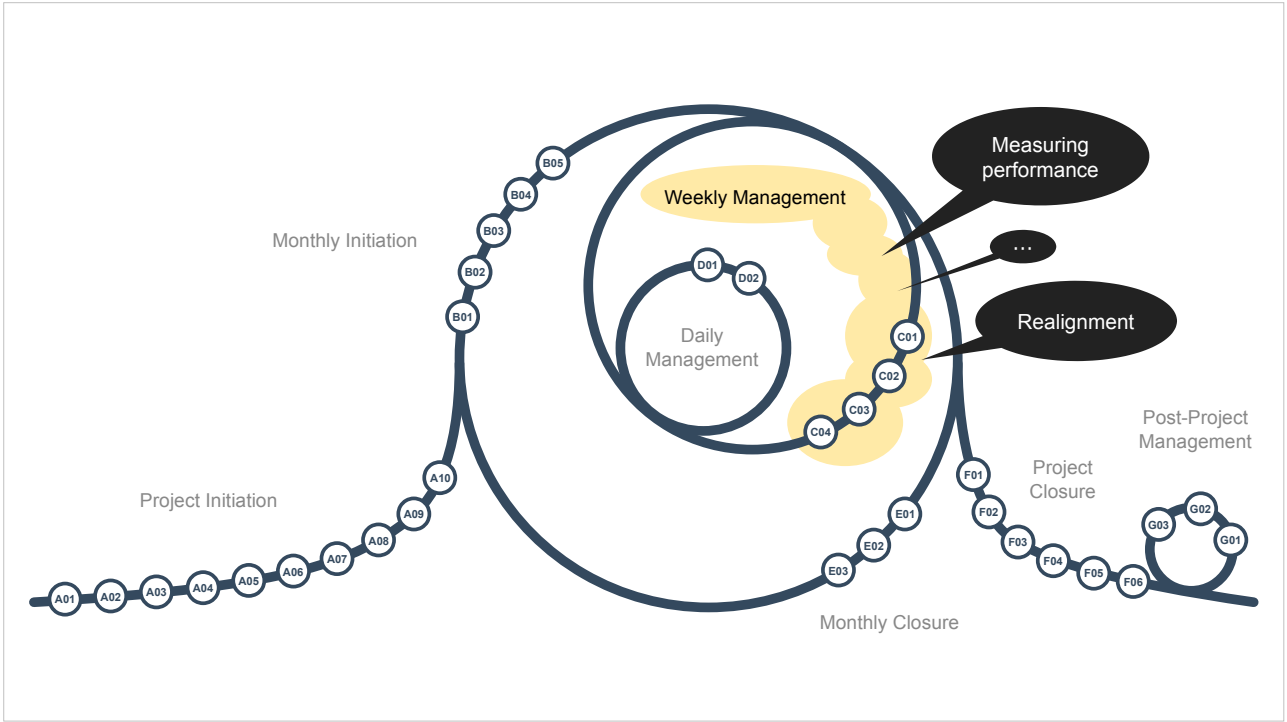


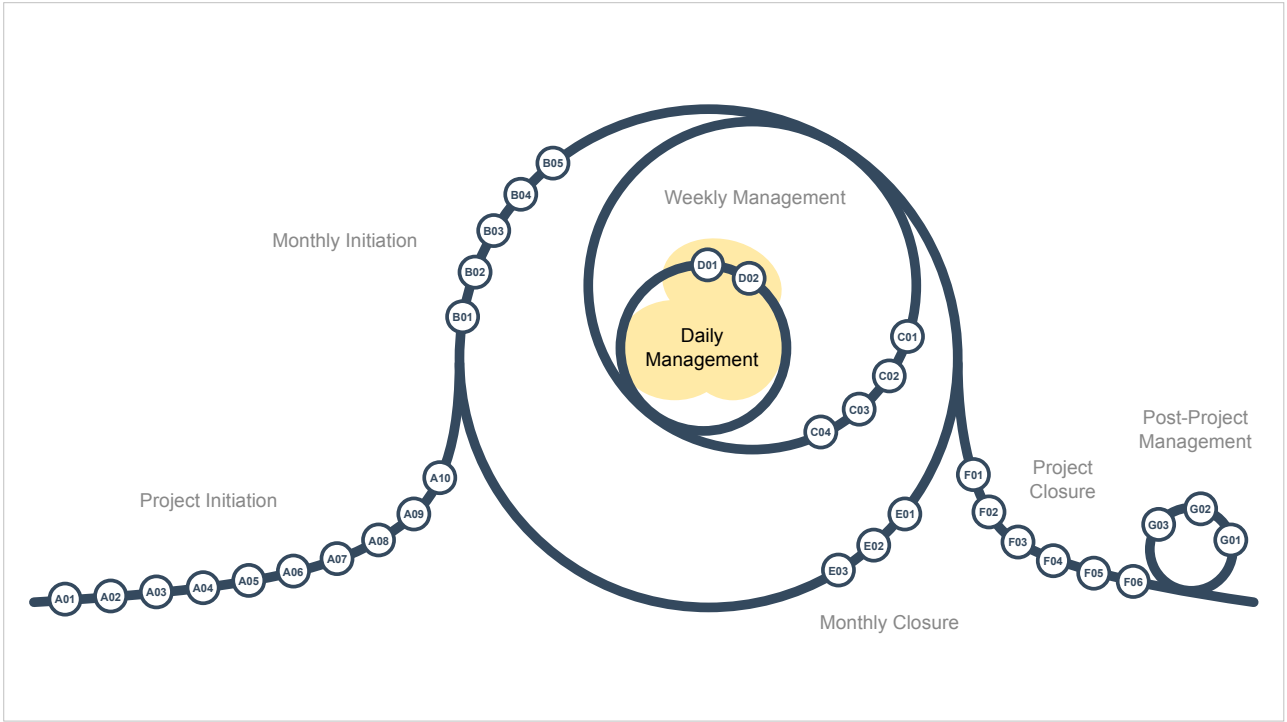


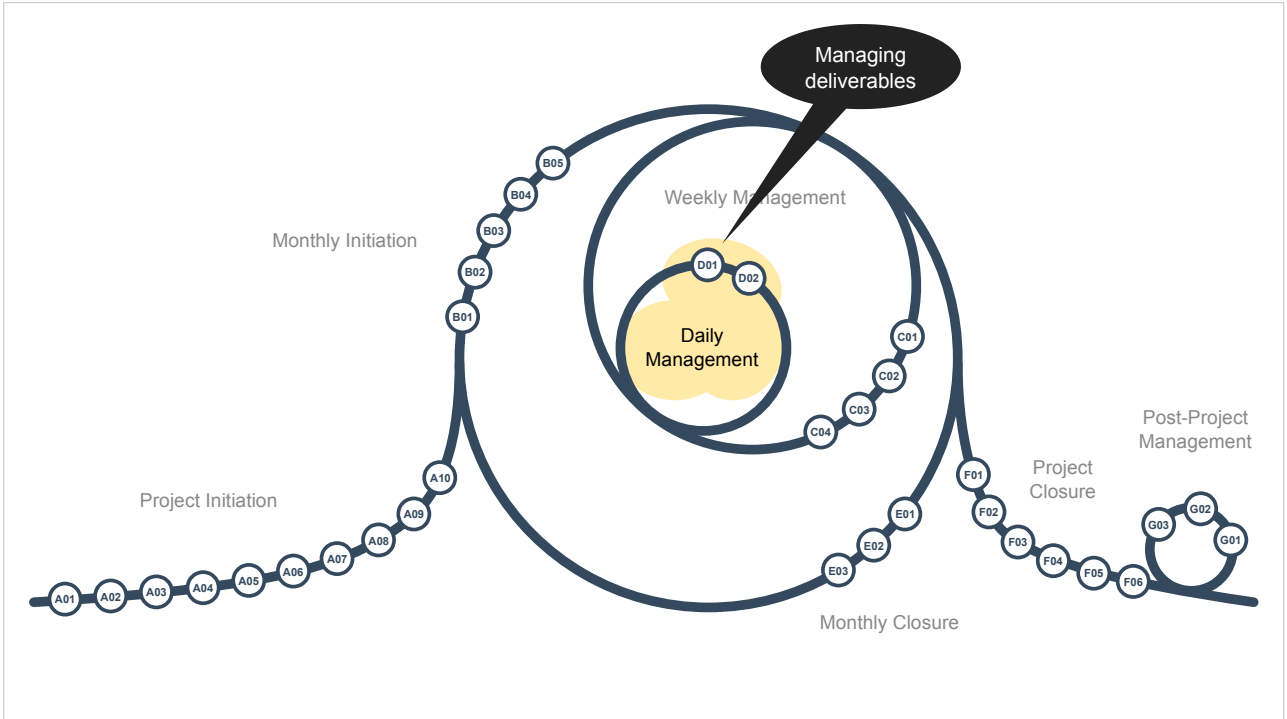
In this high-level overview, we talk about the activity groups from the high-level to the low-level ones rather than in order. So, first initiating and closing the project, then that of the monthly cycles, and then we start talking about what happens during the month.

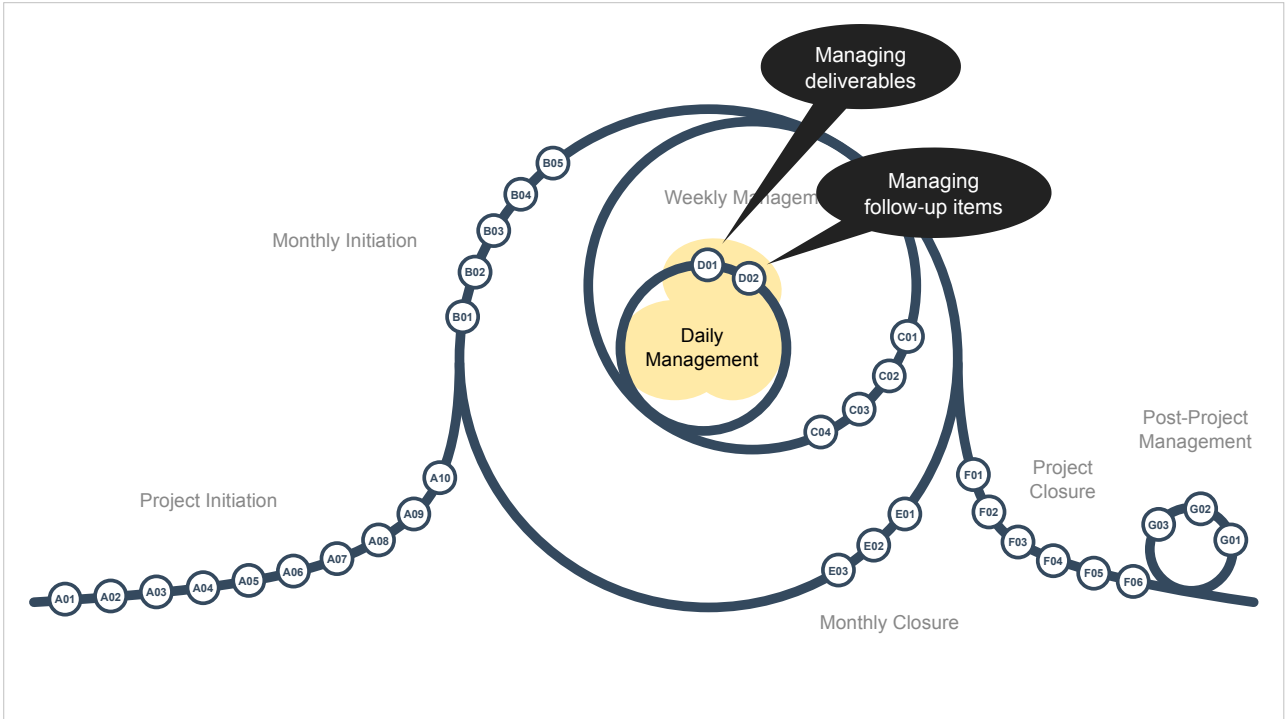


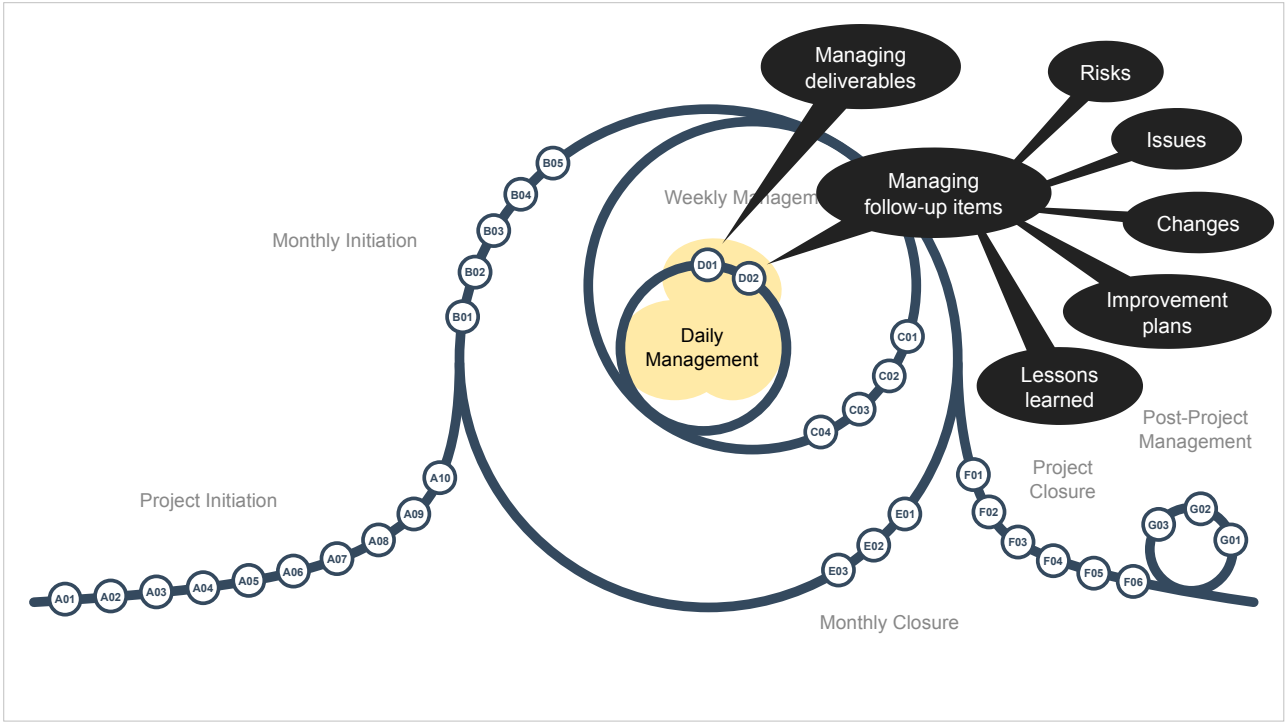


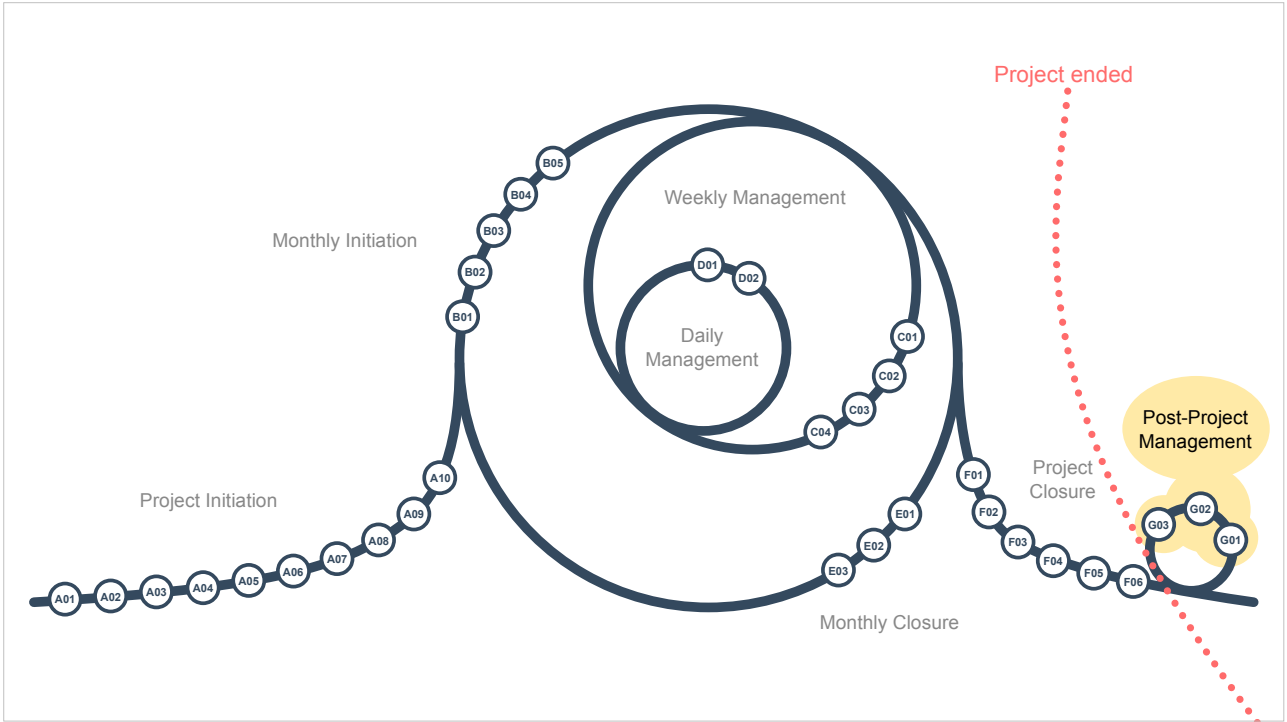


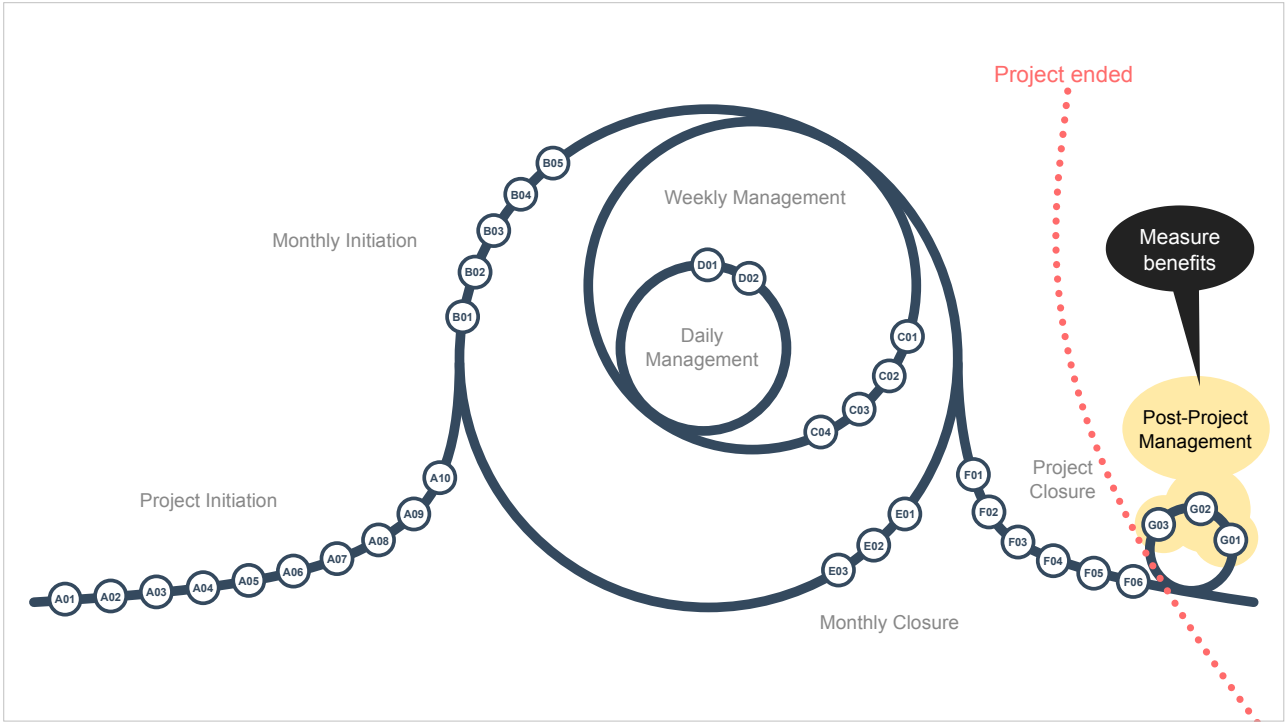


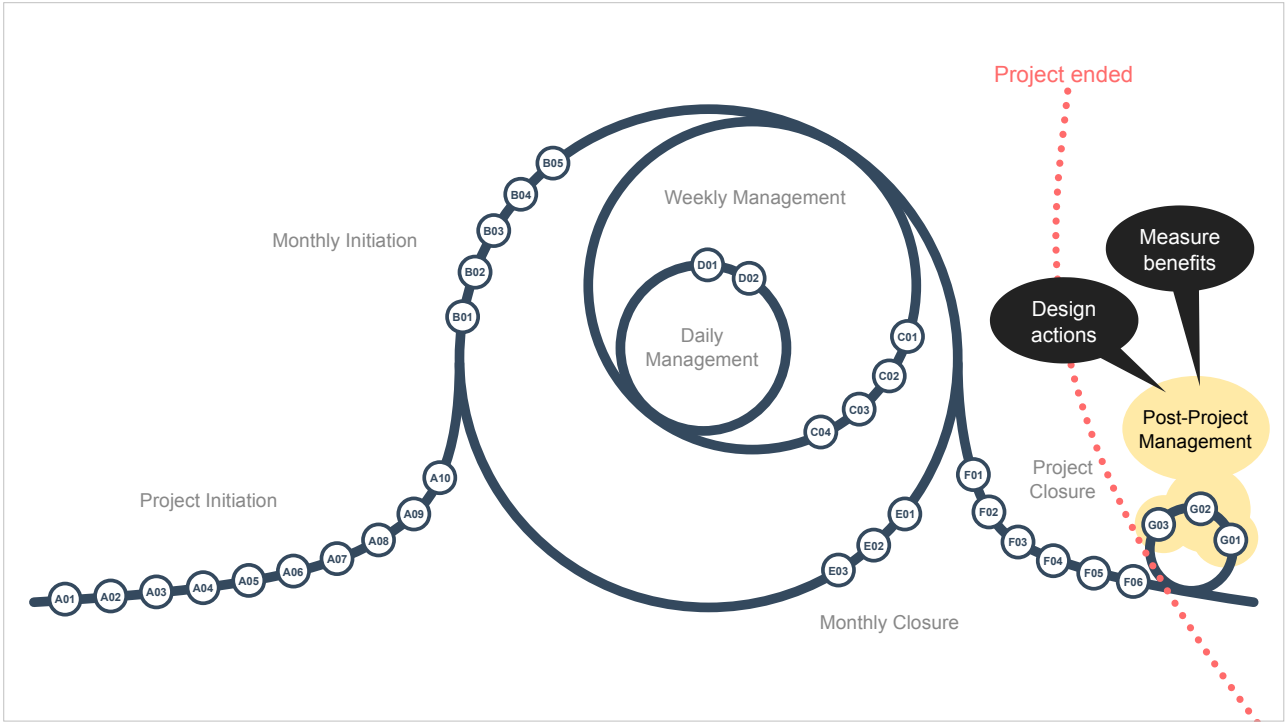


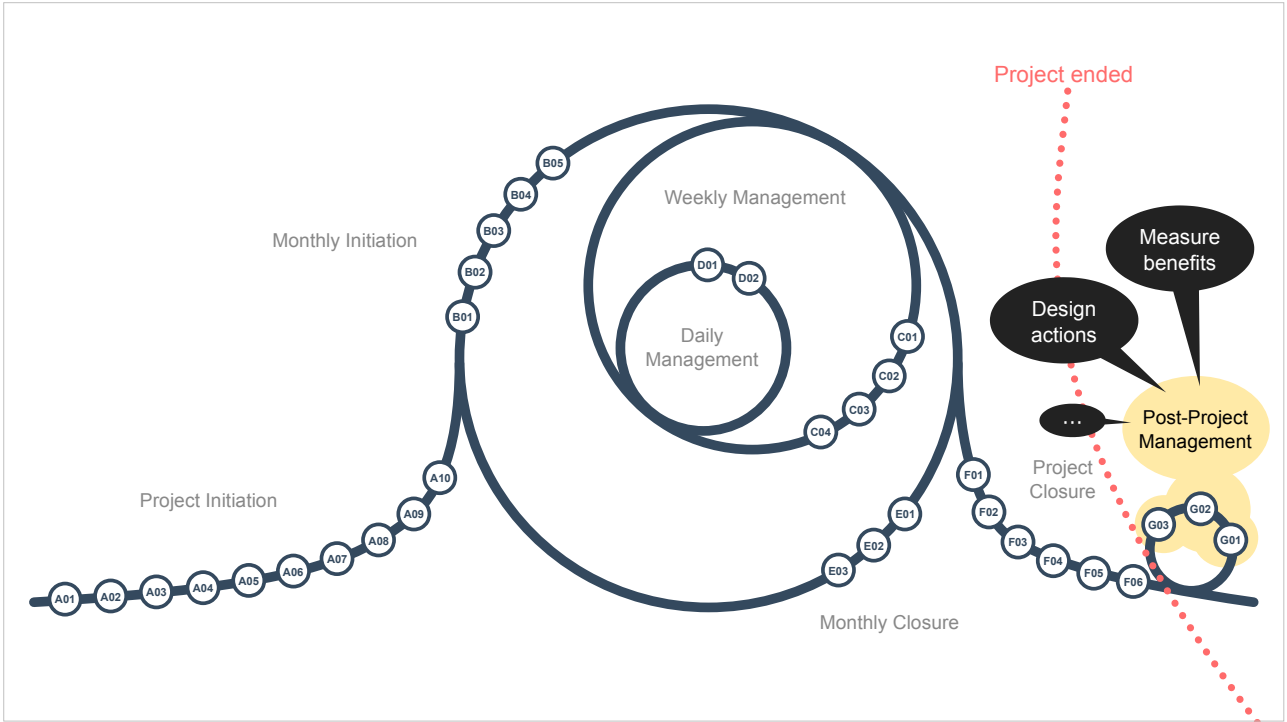












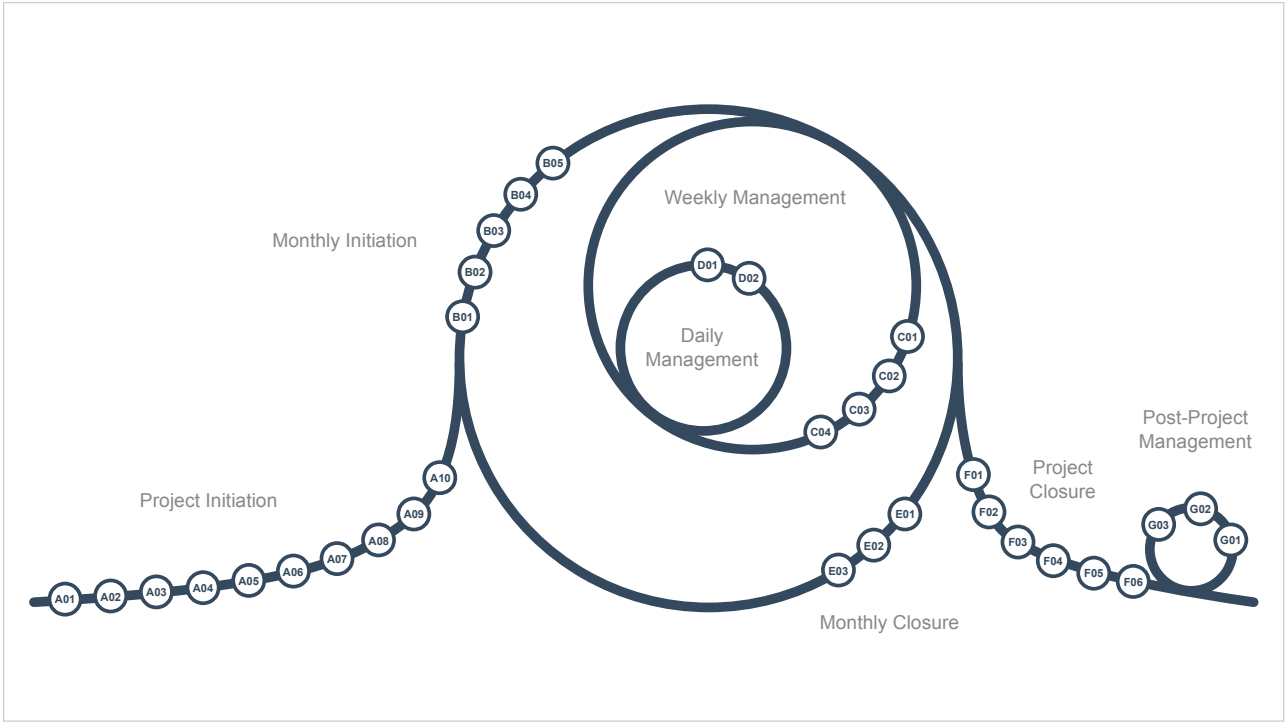


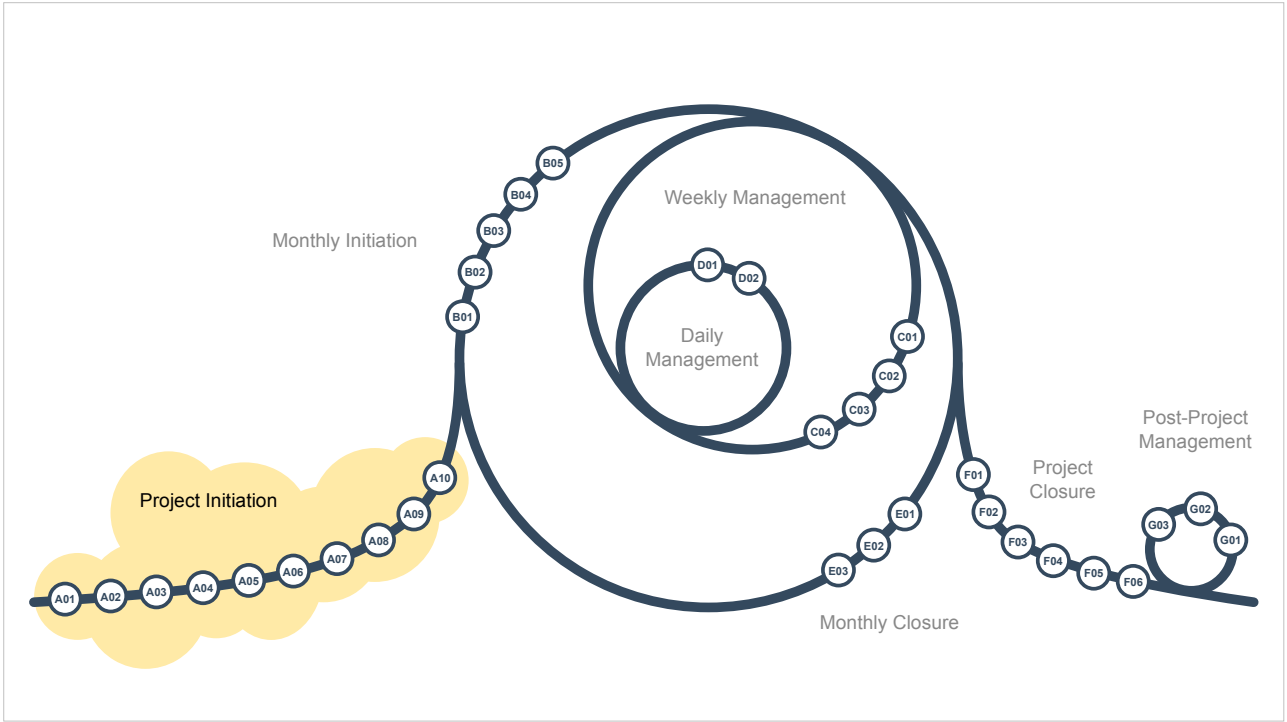
From this point on, we'll go through the details of all activities, one at a time.

Many trainers are used to spending almost the whole duration of the course explaining project planning. That should not be the case in a P3.express training program. Planning is only one of the concepts, and we need a complete, holistic, consistent, and effective process that includes every key aspect of project management and performs well from the beginning to the end. Such a process with a poor plan would work much better than a perfect plan without such a process!

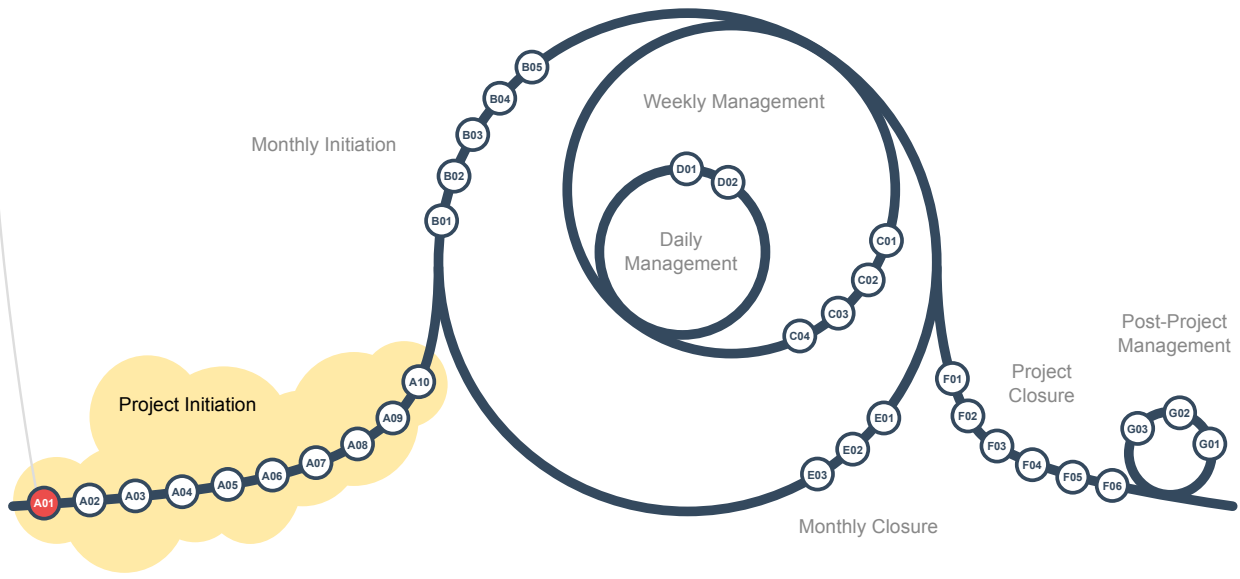
It's expected to spend more or less the same amount of time on each activity. Some can take two or even three times more than the others, but if you spend 10 or 20 times more on one of the activities compared to the rest, you'd be deviating from the true nature of the course.

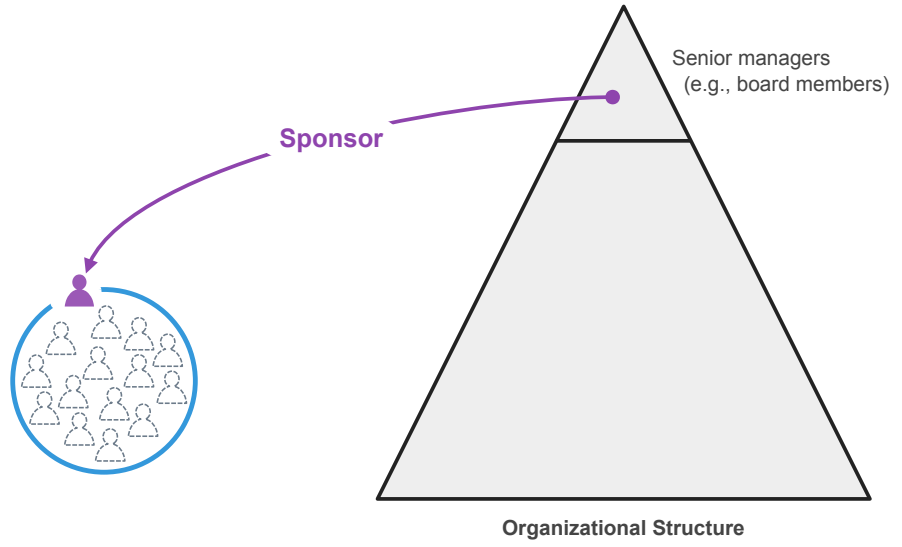
As a reminder, you may want to add advanced topics to the course (e.g., about scheduling), and that's completely fine, but we highly recommend finishing the course as it is in these slides to create a foundation and then going through advanced topics.

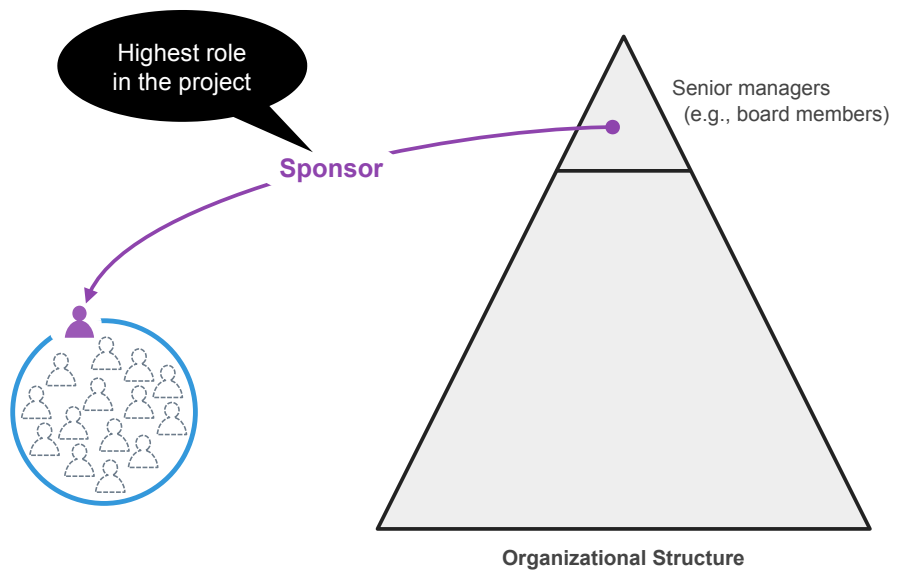


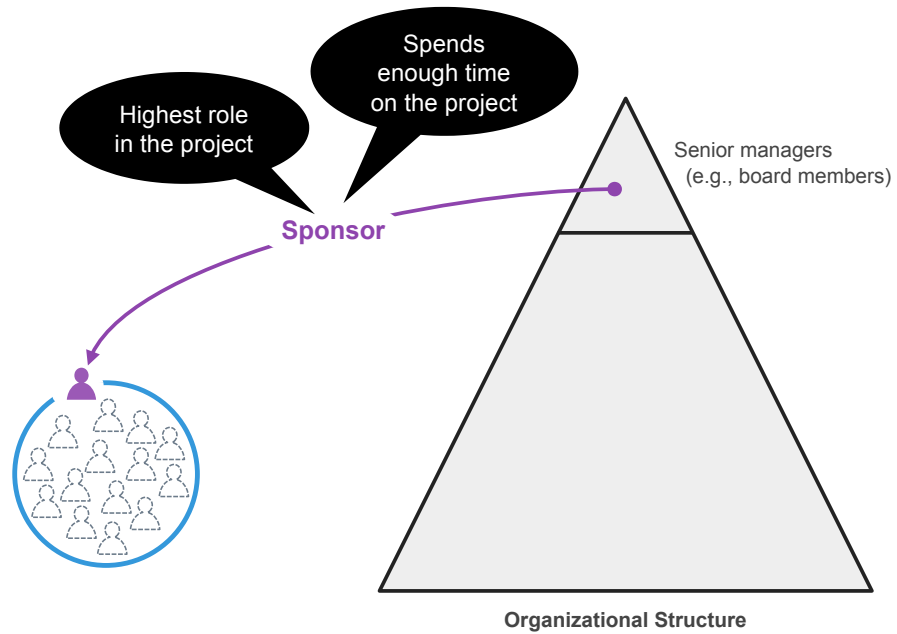


Appoint the sponsor



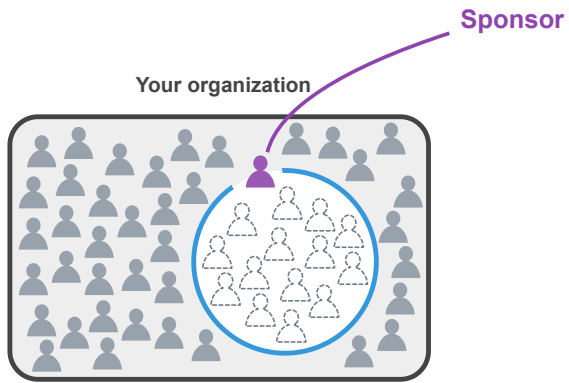


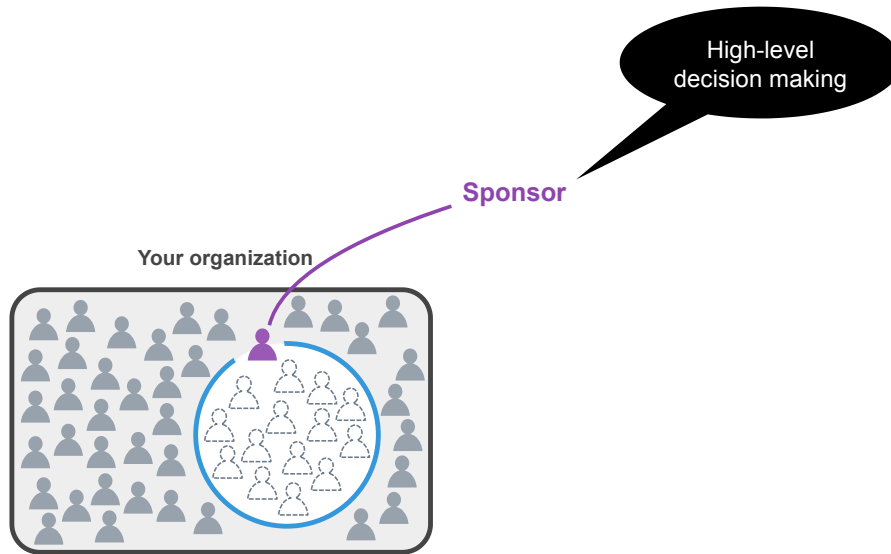




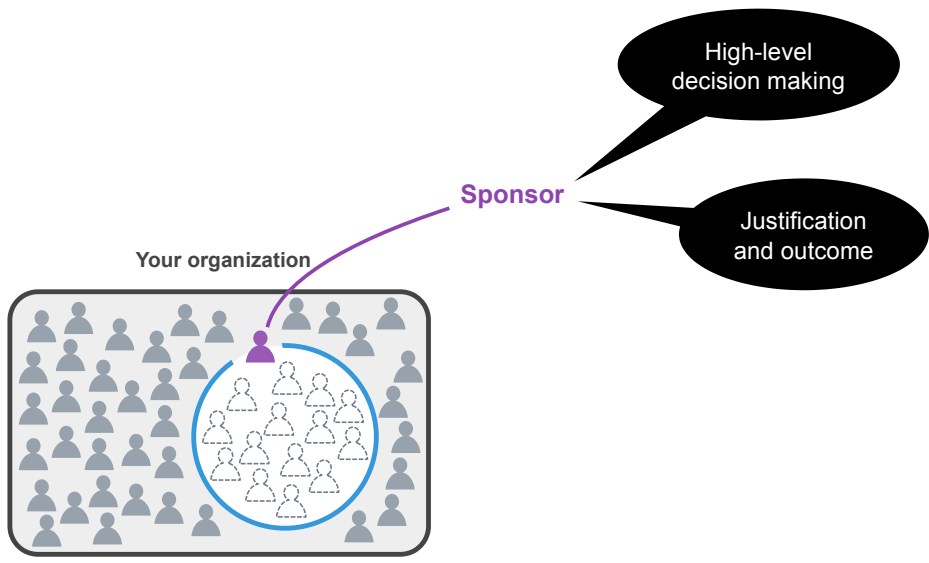
The common problem is that the person assigned to the sponsor role is too busy with “more important things” that they don’t spend time on the project.

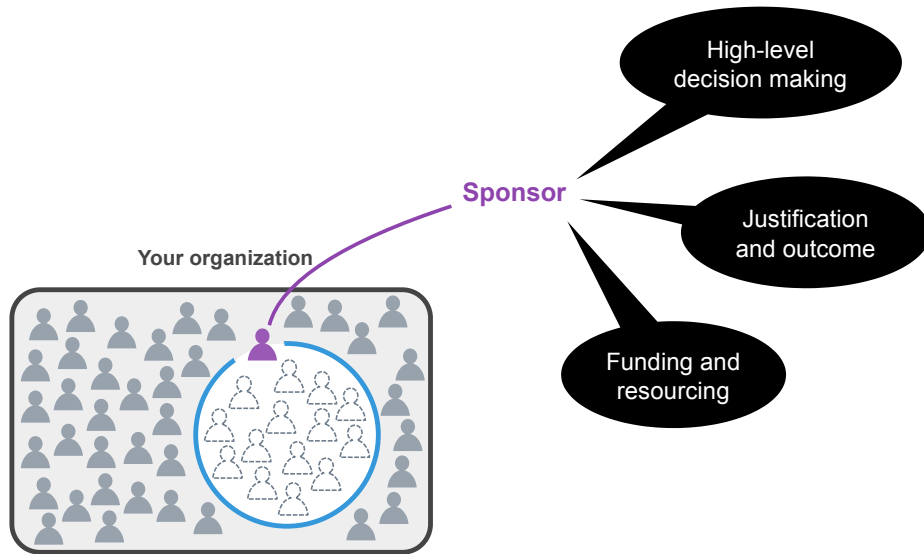
The project manager doesn’t have the organizational power to change a sponsor who’s not suitable for the project. Still, it’s always possible to talk to that person and others in the organization and use negotiation techniques (which a project manager should have) to convince them to appoint a better sponsor.



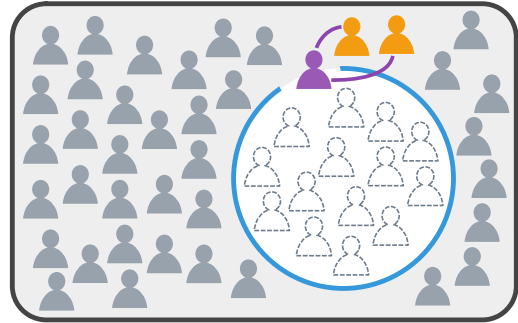
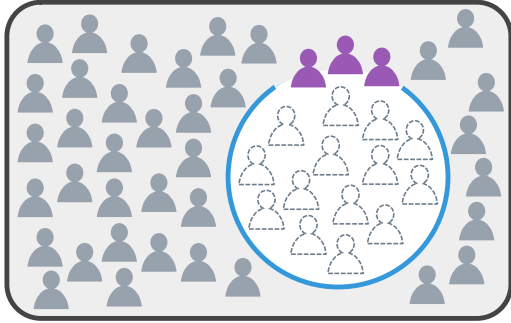


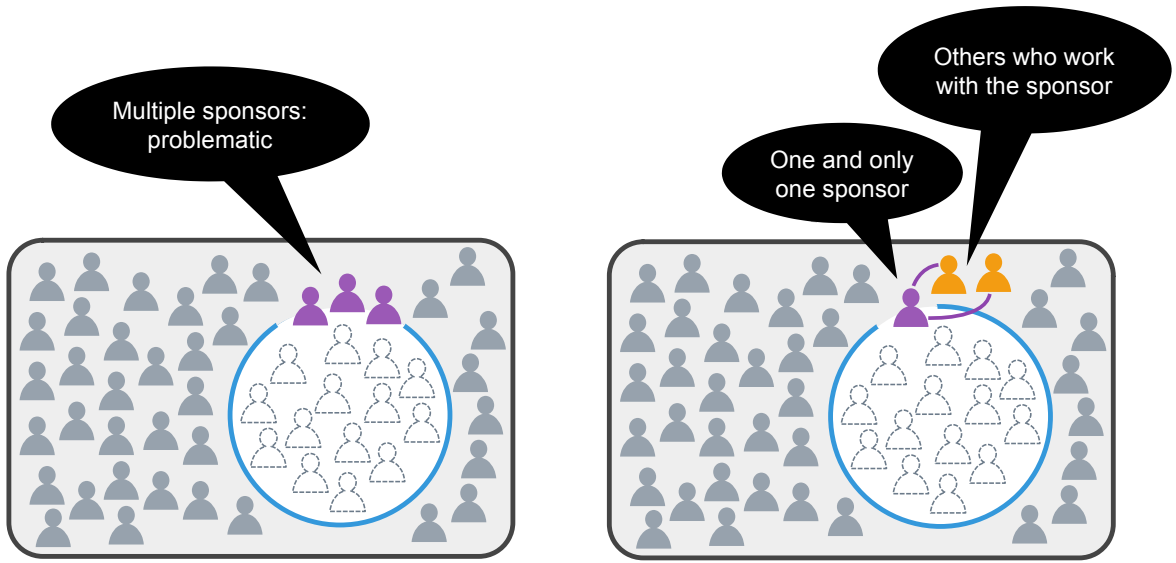
Only a person or group aware of every important thing in the organization can make high-level decisions for the project. That's one of the reasons we need to have such a person as the sponsor – most project managers do not have high-enough organizational positions to satisfy this. On the other hand, it's challenging for a single person to care about high-level and detailed aspects simultaneously.

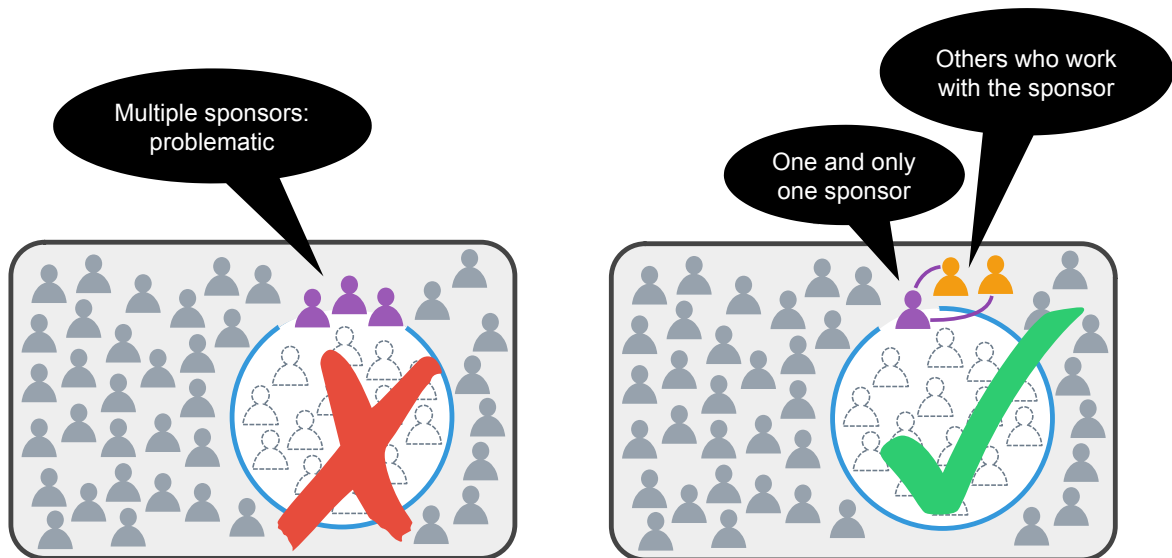




The project manager may help with funding aspects, but the sponsor is accountable for it. Also, when it comes to getting resources [from various departments], we usually need organizational power, which makes it the ultimate responsibility of the sponsor.







The sponsor is the single point of contact with decision-makers in the organization.

There are various levels of management related to projects, and we'll talk more about them toward the end of the course. In most cases, there's more than one person involved in high-level decisions of any project, and it's sometimes complicated and involves company politics and so on. We don't want the project manager to worry about it: The sponsor is the only source of high-level decision-making for the project manager. It's up to the sponsor to see who else should be involved in those decisions and talk to them, not the project manager.

Why do you think we need to have a sponsor in addition to the project manager?



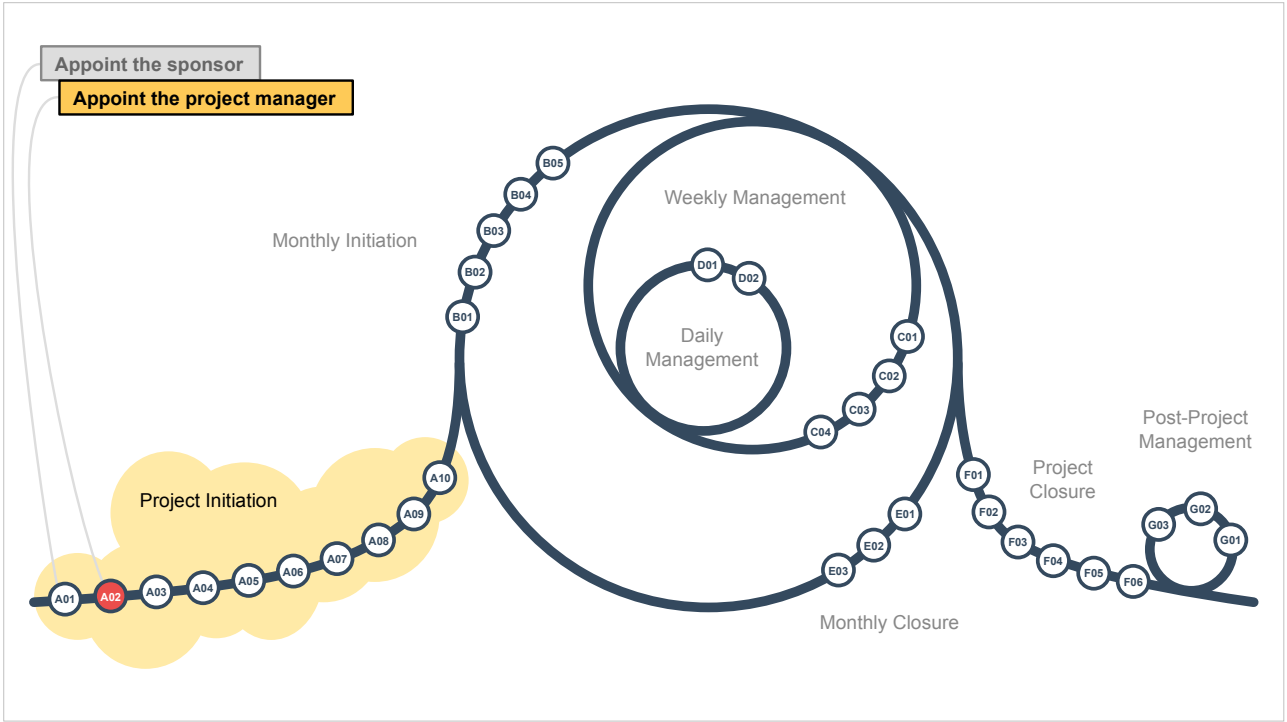
The bottom-left icon means you should ask the question from the class and ask them to answer it individually.

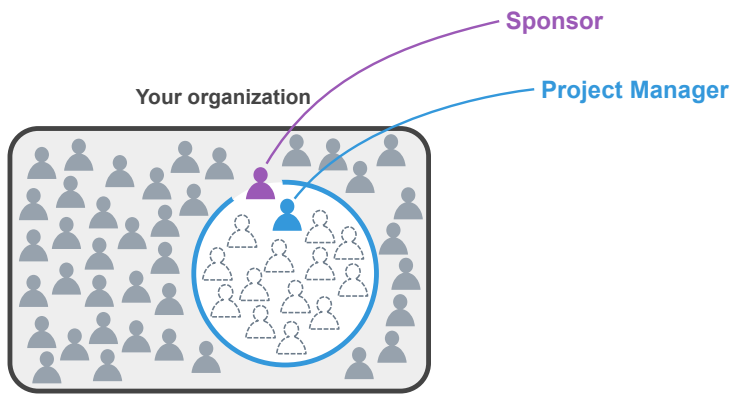
The bottom-right icon means you should ask people to work in teams of two, take a few minutes, and then present their opinion.

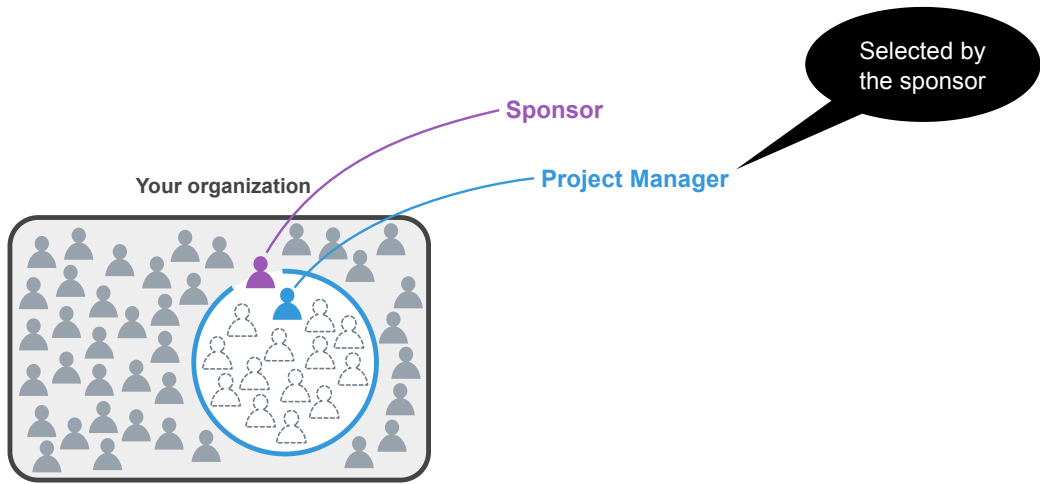
For this question, the bottom-right icon is highlighted.

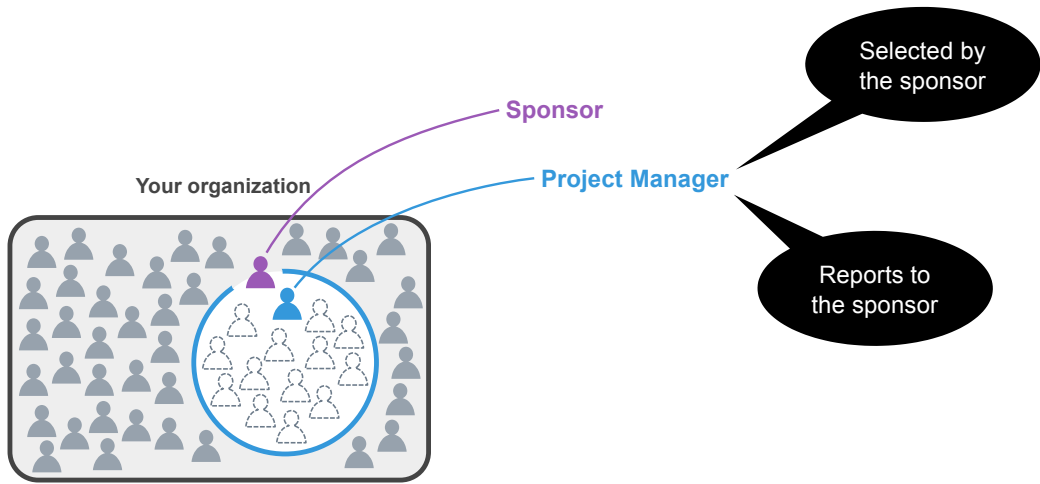
The main reasons we need to have a sponsor:

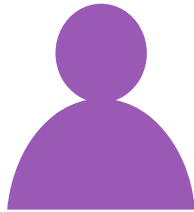
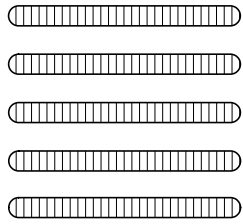
- Project managers usually don't have high organizational power to bring money, people, and other resources to the project.
- Deciding who to contact for every high-level decision is challenging and needs a deep understanding of the organization. It works better to have a single, suitable person for it.
- It's difficult for a single person to think about the high-level and detailed aspects simultaneously, and people who try to do so usually underestimate one of the two.





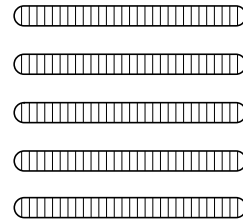




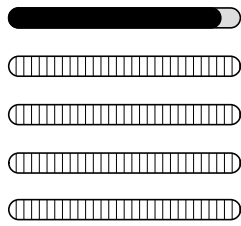


Sponsor

Organizational power
Time needed for the project
Strategic mindset
Soft skills
Micro-management

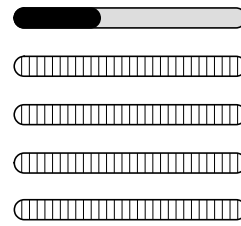


Project Manager

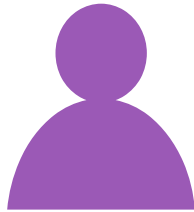
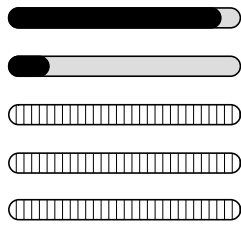


Sponsor

Organizational power
Time needed for the project
Strategic mindset
Soft skills
Micro-management

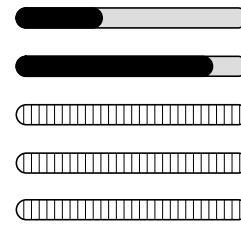


Project Manager

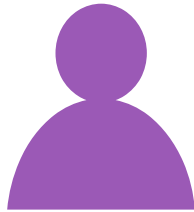
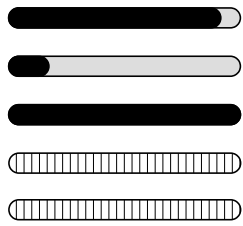


Sponsor

Organizational power
Time needed for the project
Strategic mindset
Soft skills
Micro-management



Project Manager

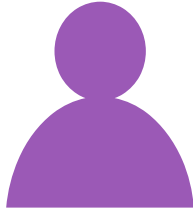
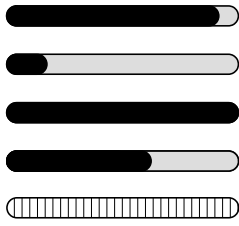


Sponsor

Organizational power
Time needed for the project
Strategic mindset
Soft skills
Micro-management



Project Manager

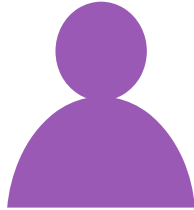
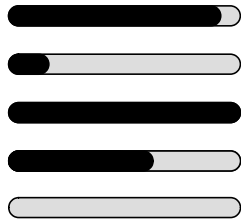


Sponsor

Organizational power
Time needed for the project
Strategic mindset
Soft skills
Micro-management

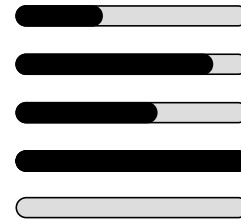


Project Manager

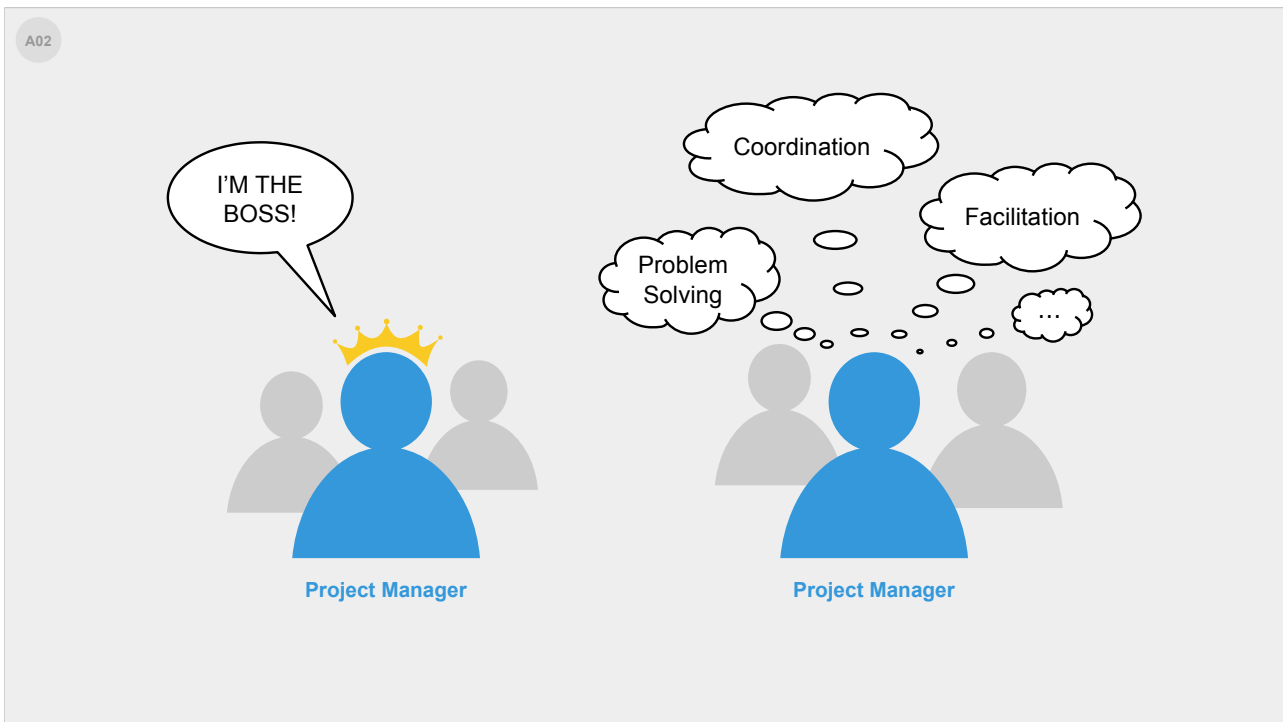


Sponsor

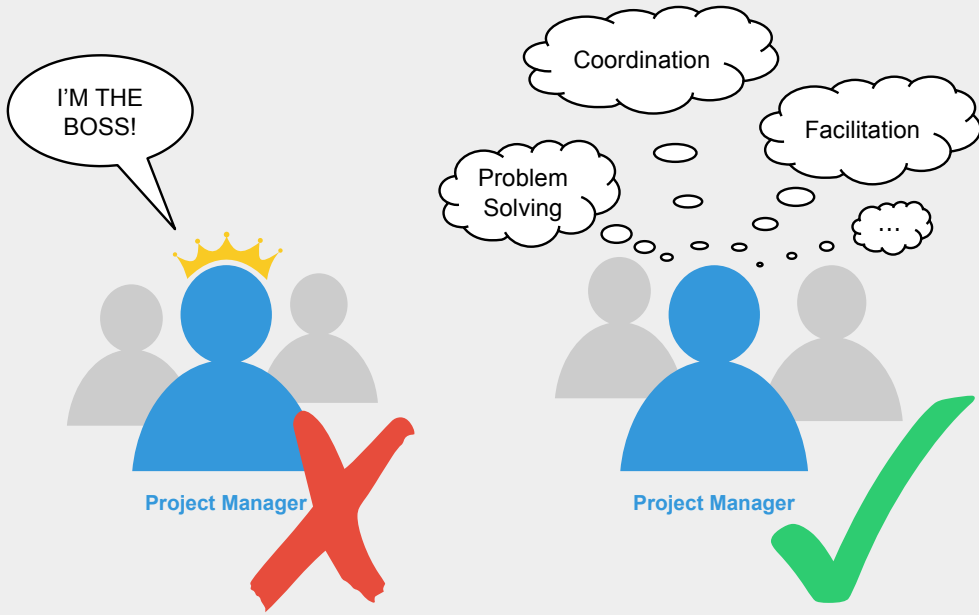
Organizational power
Time needed for the project
Strategic mindset
Soft skills
Micro-management

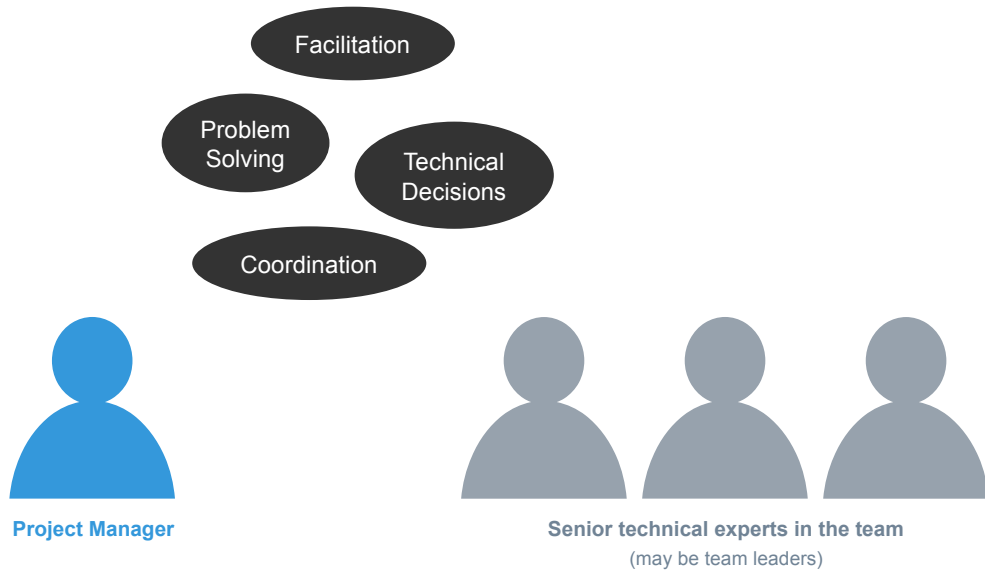


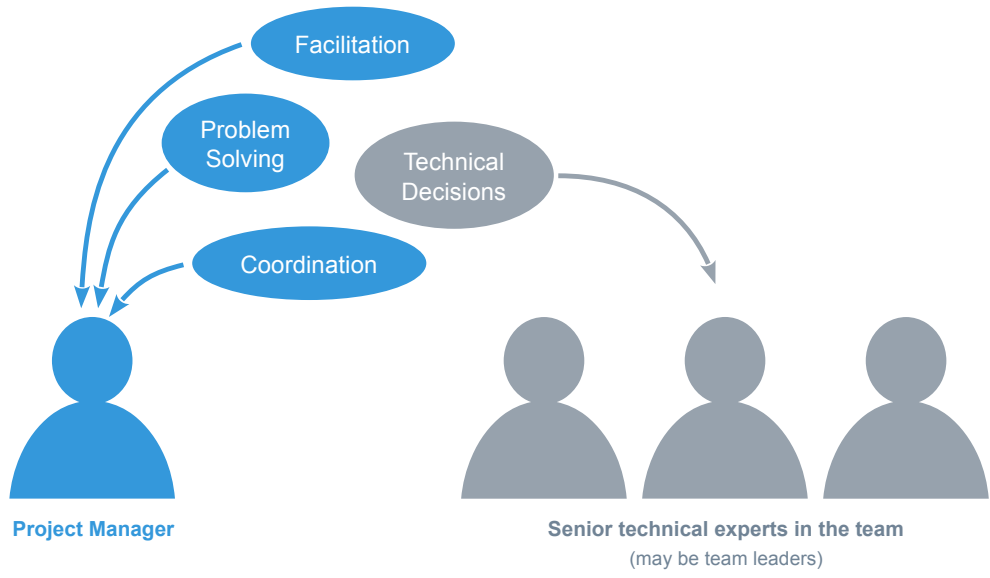
Project Manager

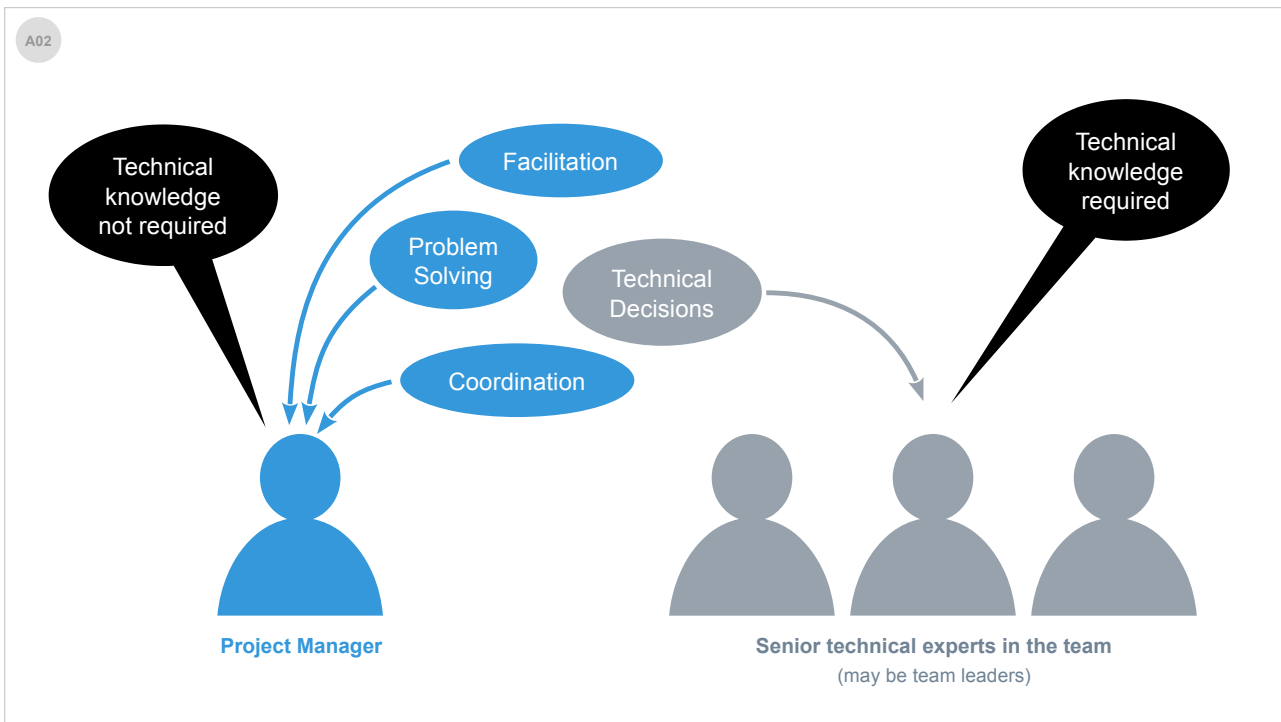


The following few slides make it clearer what it really means. In general, the project manager is not everyone's boss but a supporter who makes it easier for everyone to contribute to the project.



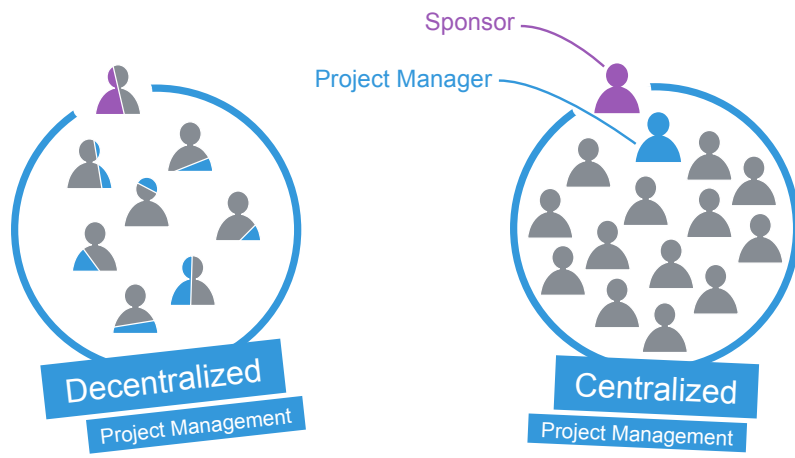


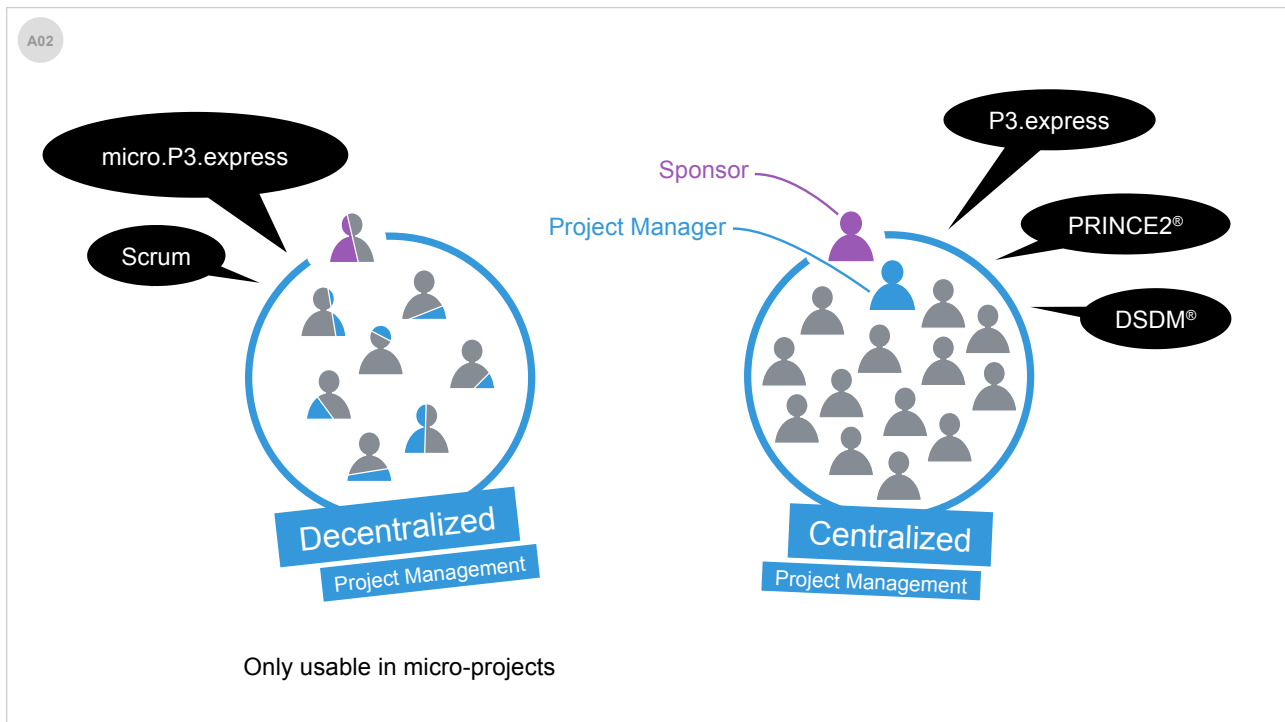




In many projects, the most senior expert becomes the project manager. They stay responsible for important technical decisions and also have the project manager role, which makes some people think that a project manager should always be technical.

A practical setup needs a project manager who manages projects well: helping people solve problems, coordinating, facilitating, etc. This person doesn't need to be responsible for the technical decisions, and those can be taken by the senior experts in the team (team leaders), potentially with supervision from their organizational department. That's why we don't expect a project manager to be technical.





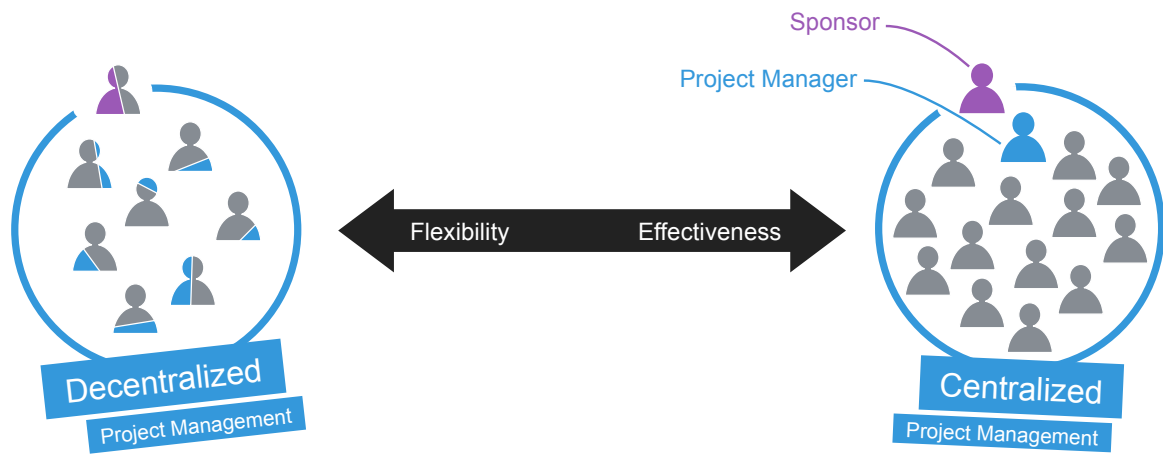
All projects have “project management” (either explicit and structured or implicit/implied).

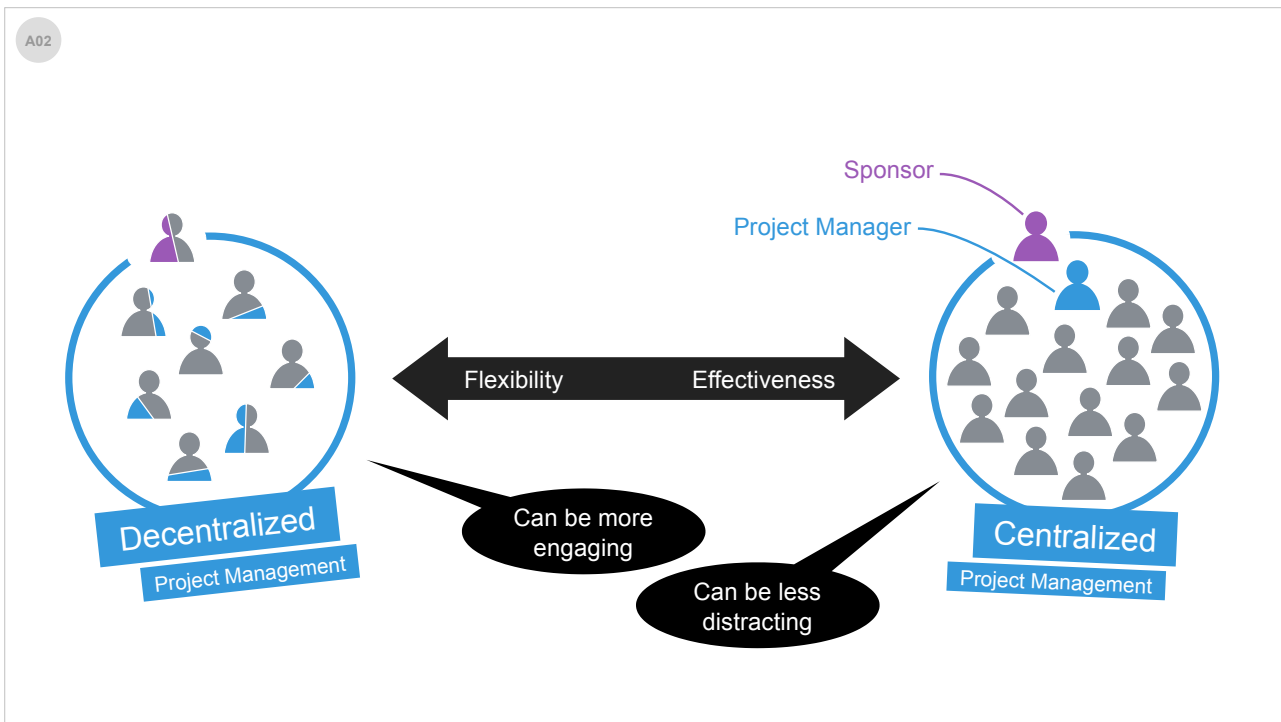
In micro-projects, there’s the option to have a decentralized project management system, where instead of having one or a few people dedicated to project management activities, all team members contribute to it. However, this does not apply to larger projects, and there we need to have a centralized project management system where one or a few people are responsible for facilitation, coordination, etc. This team (which can be a single-person team) has a head that’s called a project manager.

P3.express has a centralized project management system because it’s designed for small, medium, and large projects. However, micro.P3.express, which is designed for micro-projects, has a semi-decentralized system.

Is having a project manager against Agility?

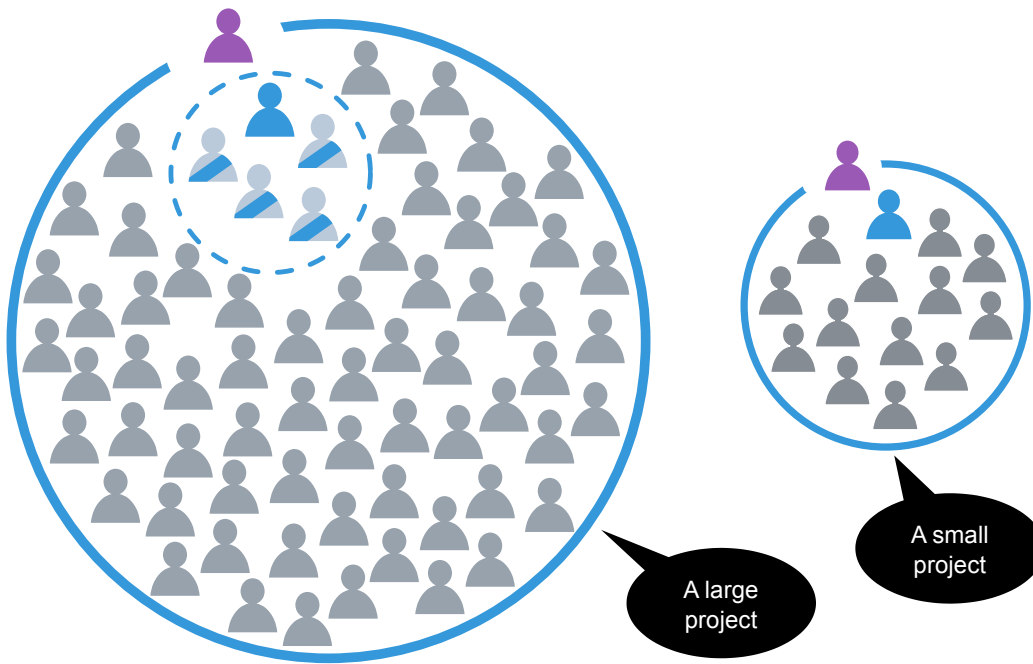
No. Scrum is designed to have a decentralized project management system, and adding a project manager role to it disturbs the whole system. However, not every Agile method is like that; e.g., DSDM, which is one of the first-generation Agile methods, has a project manager role, and XP (another first-generation system) isn’t against the idea of having a project manager.





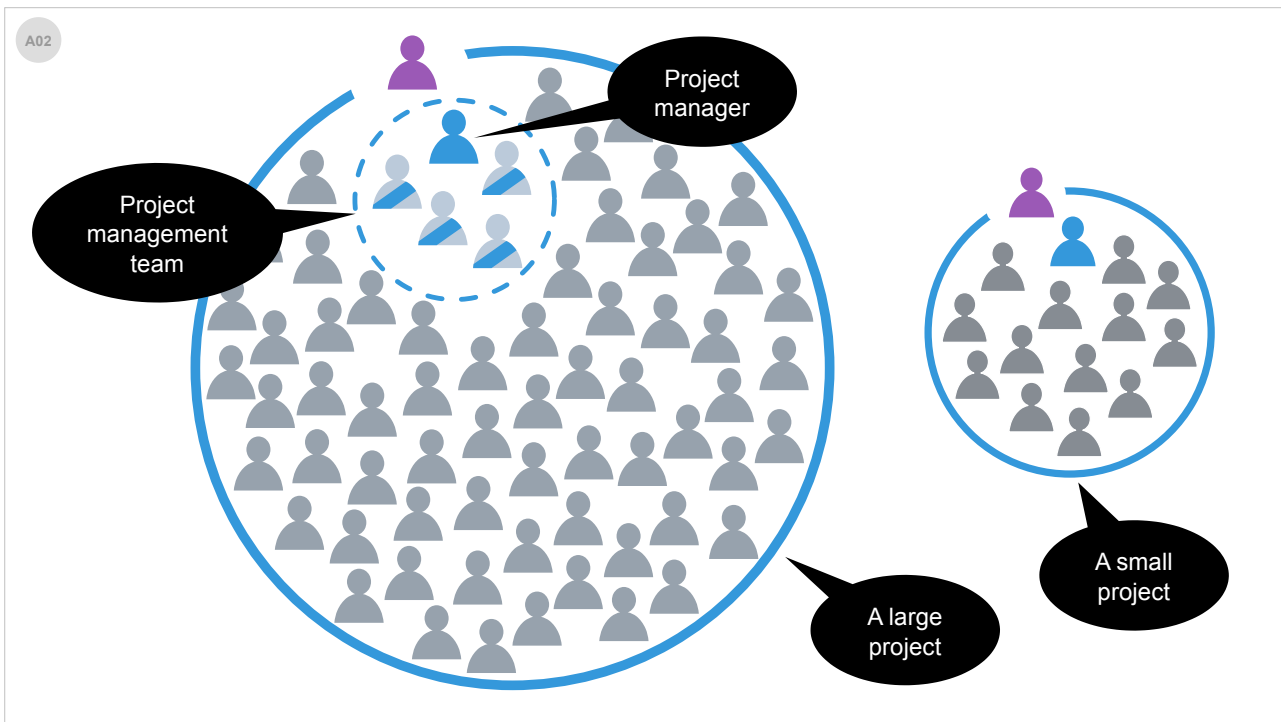
People like to be in control, which can make working in a decentralized system more attractive. On the other hand, the very same people would be distracted by the management activities and become unhappy when it becomes a responsibility for them. Some people prefer to be supported by a proper project management system and just focus on their expertise.

Regardless, the decentralized option is almost impossible when it's not a micro-project. However, there are multiple opportunities in P3.express designed to involve team members in managing the project, and it's a good idea to benefit from them (e.g., E02).



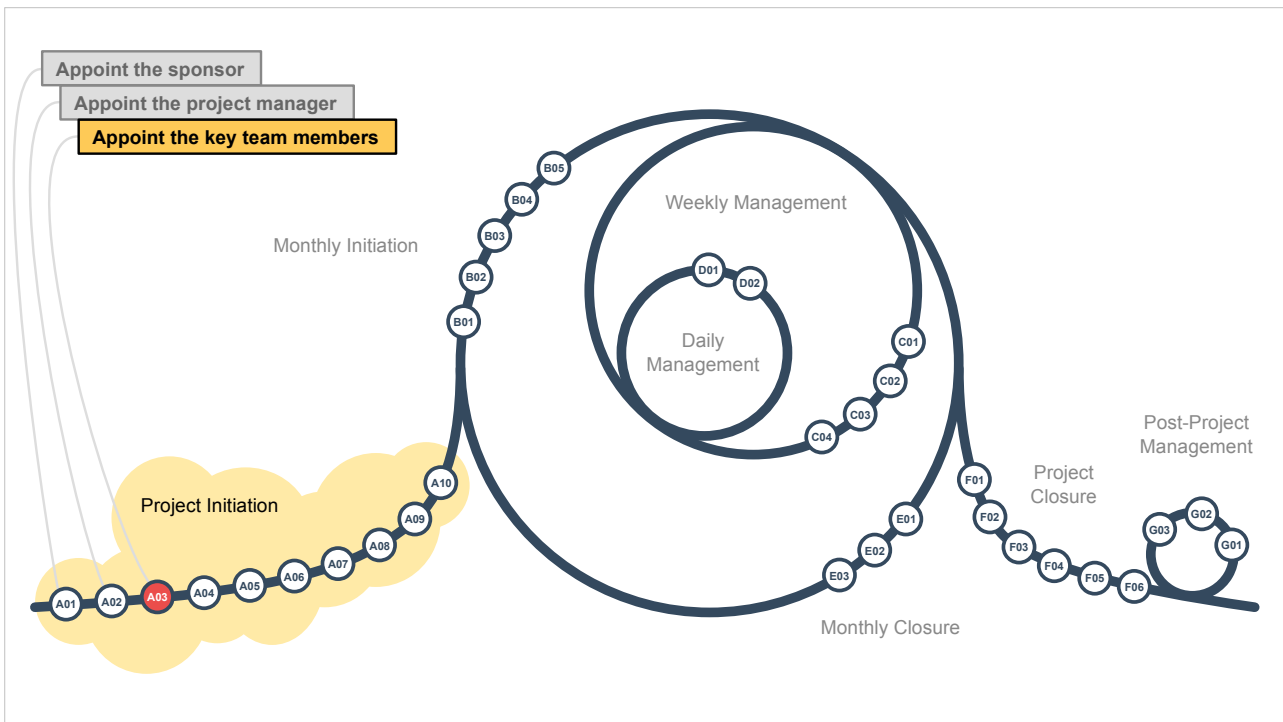
A large project

A small project



A project that's not too large may have only one person for the project management activities (i.e., the project manager). However, a single person may not be enough for larger projects. In those projects, a project management team can help the project manager.

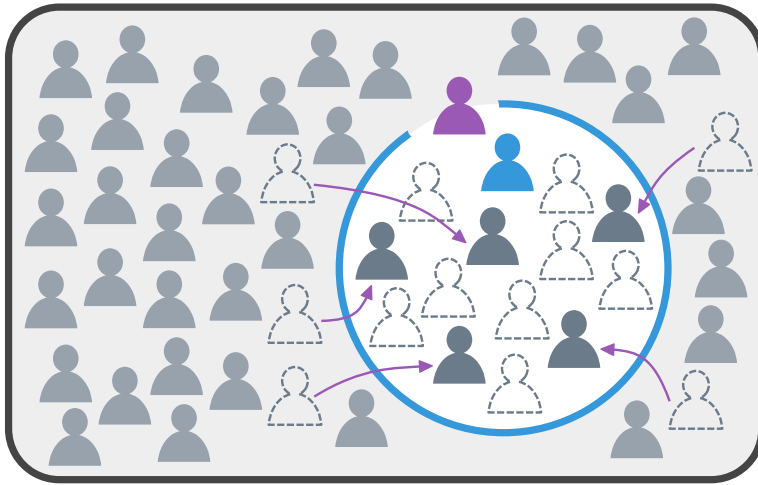
The project manager stays accountable for the project management activities but delegates the responsibility of some of them to the project management team.

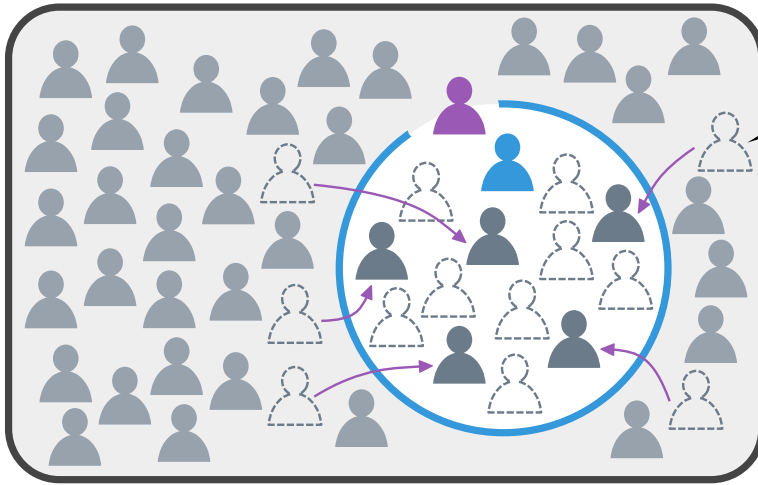


Important note about roles:

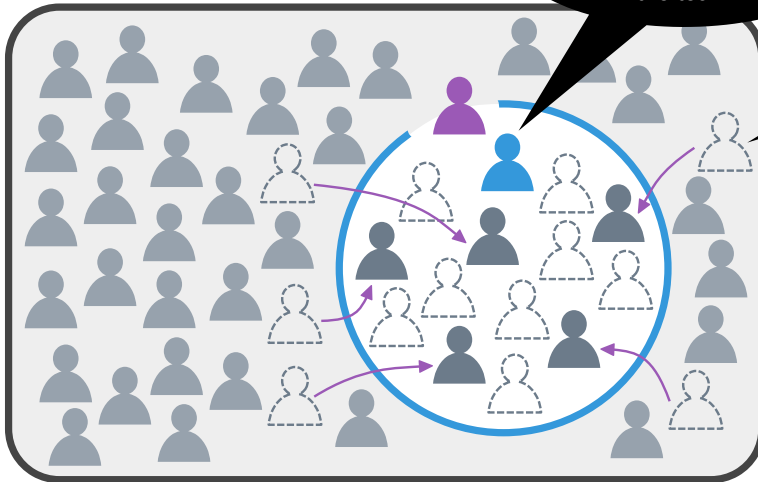
“Sponsor”, “project manager”, “team leader”, and so on are labels that some companies may use in a way that’s not compatible with P3.express and other structured systems; e.g., the person they call a sponsor may actually play the role of a project manager, and the person they call a project manager may play the role of a team leader. The problem in this scenario is not using labels differently but that they don’t have anyone to play the role defined here as a sponsor.

This is especially the case with project managers: Many of the people who are considered project managers are, in fact, team leaders responsible for some coordination and high-level technical decision-making. Project management topics may inspire these people, but they can’t fully relate to them. The problem is not with them nor the content, but the fact that confusion over names has led them to a type of training not designed for them.



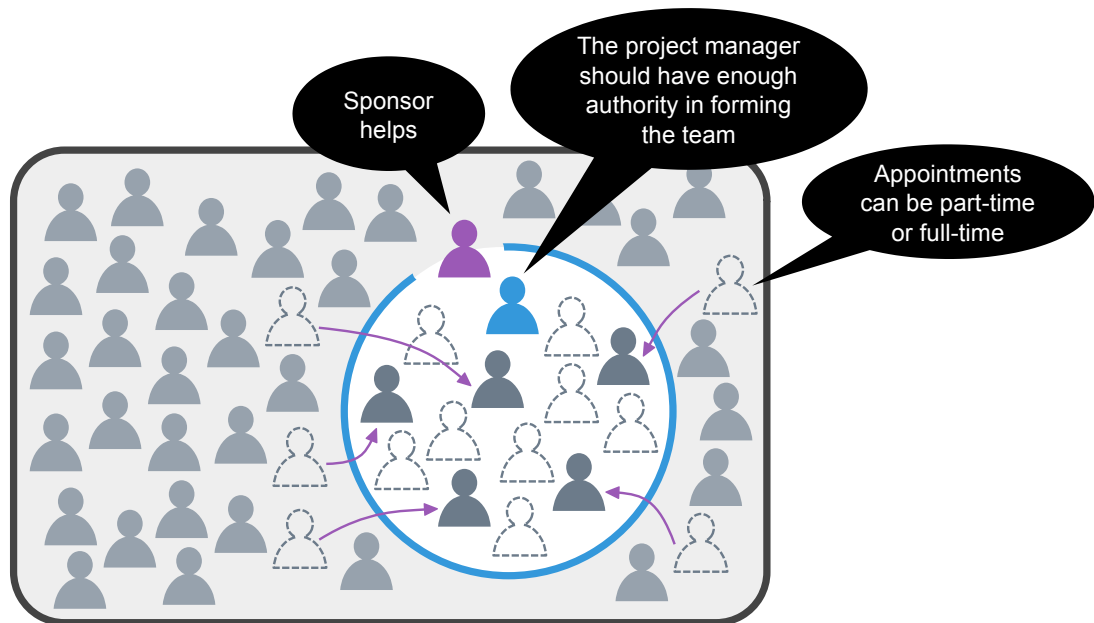


Appointments can be part-time or full-time



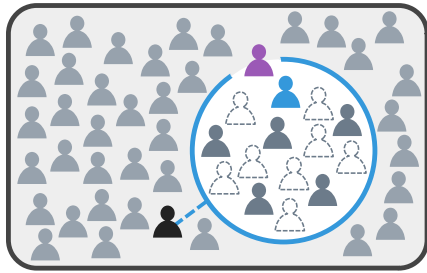
The project manager should have enough authority in forming the team

Appointments can be part-time or full-time

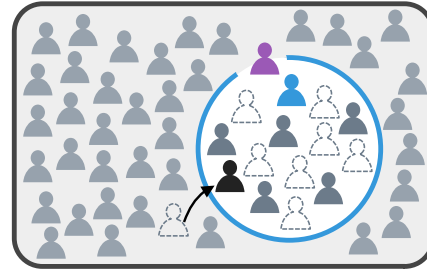


The sponsor is responsible for providing the project with resources because it usually requires organizational power. So, in this activity, we expect a lot of help from the sponsor. However, the project manager should have enough say in forming the team.

Reminder: The project is not confirmed yet, and its execution is not started, but we do [officially] appoint team members to it, because we need serious effort in initiating the project and providing the decision makers with reliable information for making a go/no-go decision.



Assigning project work to random people from the organization's departments

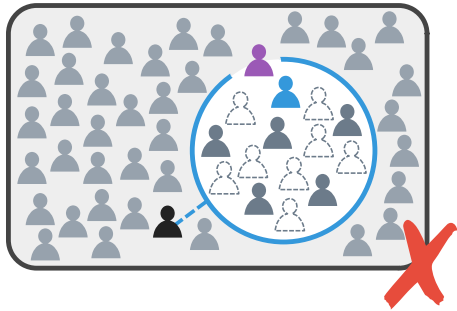


Officially appoint people to the project (even though it's not approved yet)

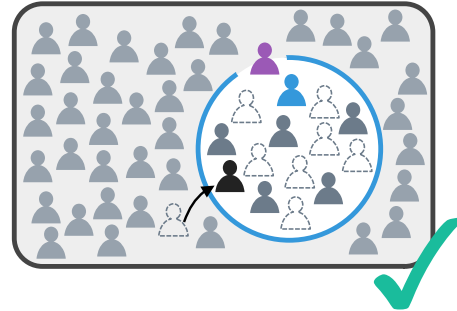
Some organizations don't appoint individuals to projects, but whenever the project has a technical task, expect them to send it to the related department, and the department's manager assigns it to one of their available people.

This is not a good setup because people who are contributing to the project won't have a complete image of the project and would be only focused on their specialist activities. Instead of sending tasks to departments, we expect them to officially appoint one or a few of their people to the project. Those people would be team members and work with other team members toward the project goal.

In this setup, the technical team members may consult their department for specific works, and their department manager may supervise the quality of their technical work, and it's absolutely fine.



Assigning project work to random people from the organization's departments

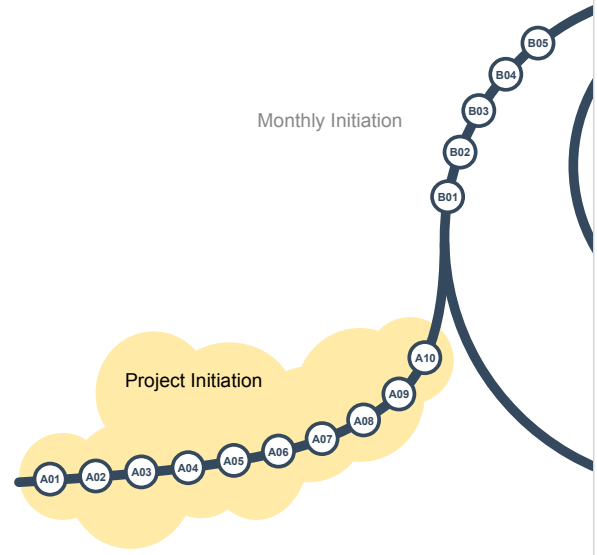


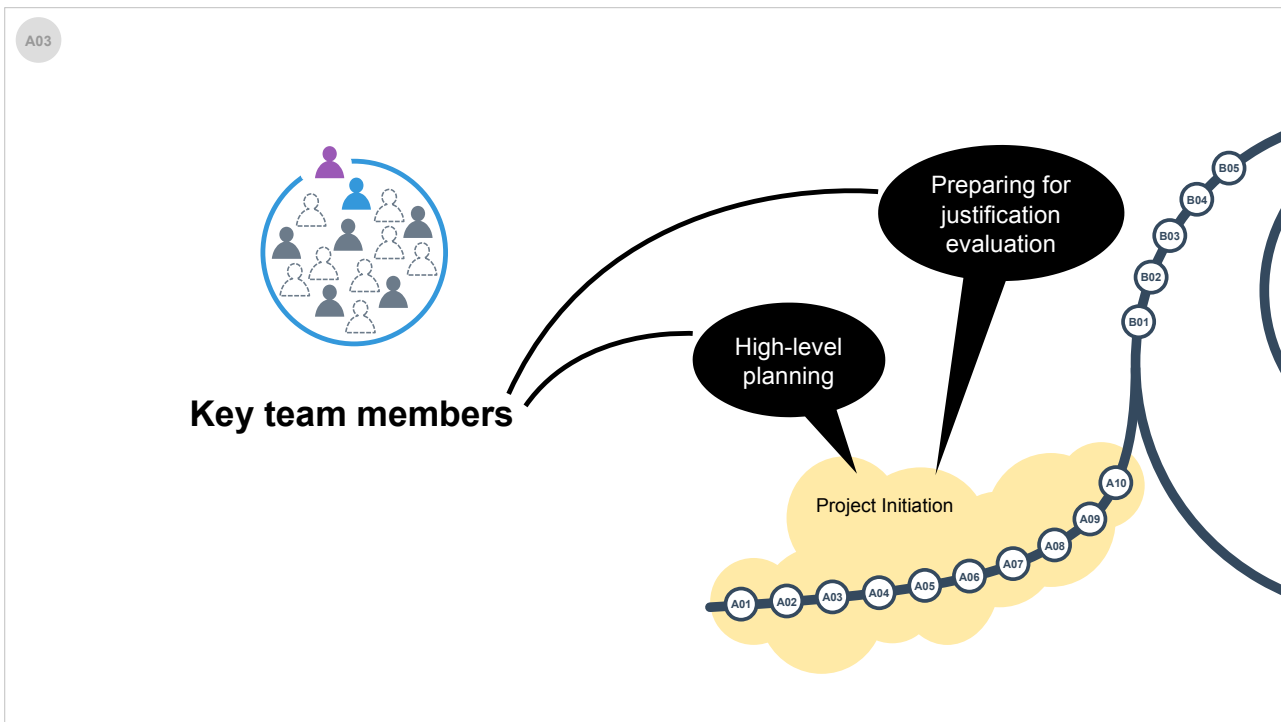
Officially appoint people to the project (even though it's not approved yet)

Realistic initiation



Key team members





So, who's a key team member? Who do we need to have on the team during project initiation?

It can be answered based on the purpose: Our purpose is to create a high-level plan which works as a foundation for the project and is also used to make the go/no-go decision. Therefore, anyone needed to collect and analyze the information and create a reliable high-level plan should be in the team.

Project Initiation



Project Initiation



Project execution in monthly cycles



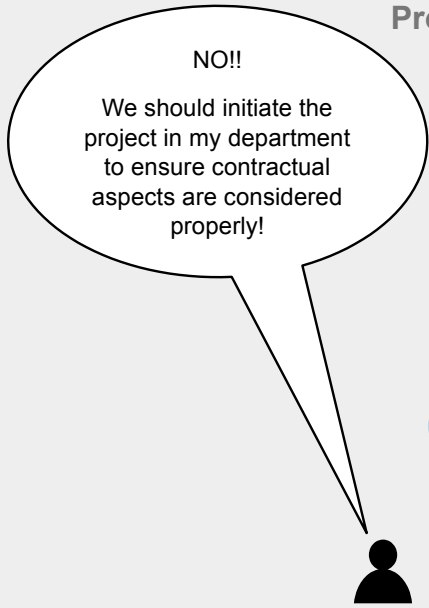
The same people who will do the project should initiate it rather than a separate team.

Many organizations have a team that initiates projects, signs the contract with external stakeholders, and then hands it over to another team that executes it. P3.express is against it: The same team that's supposed to execute the project should initiate it because that's the only way we can have a reliable, realistic high-level plan.

Project Initiation



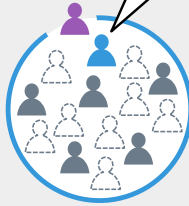
Project Initiation



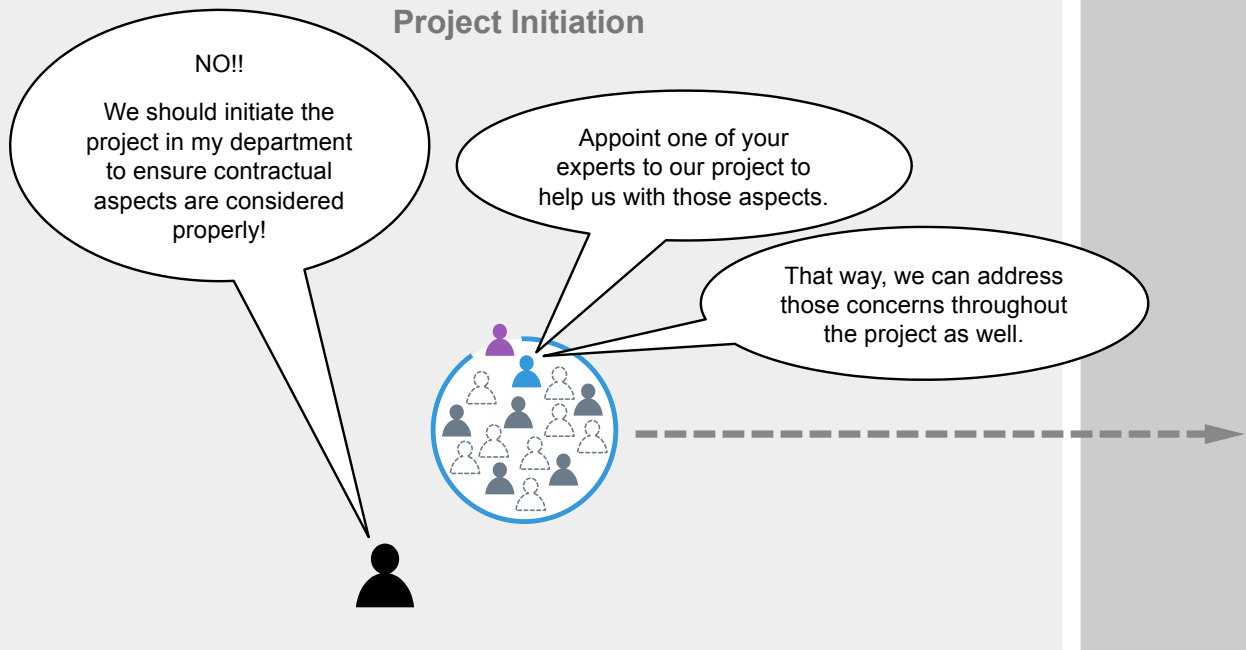
Project Initiation

NO!!
We should initiate the project in my department to ensure contractual aspects are considered properly!

Appoint one of your experts to our project to help us with those aspects.

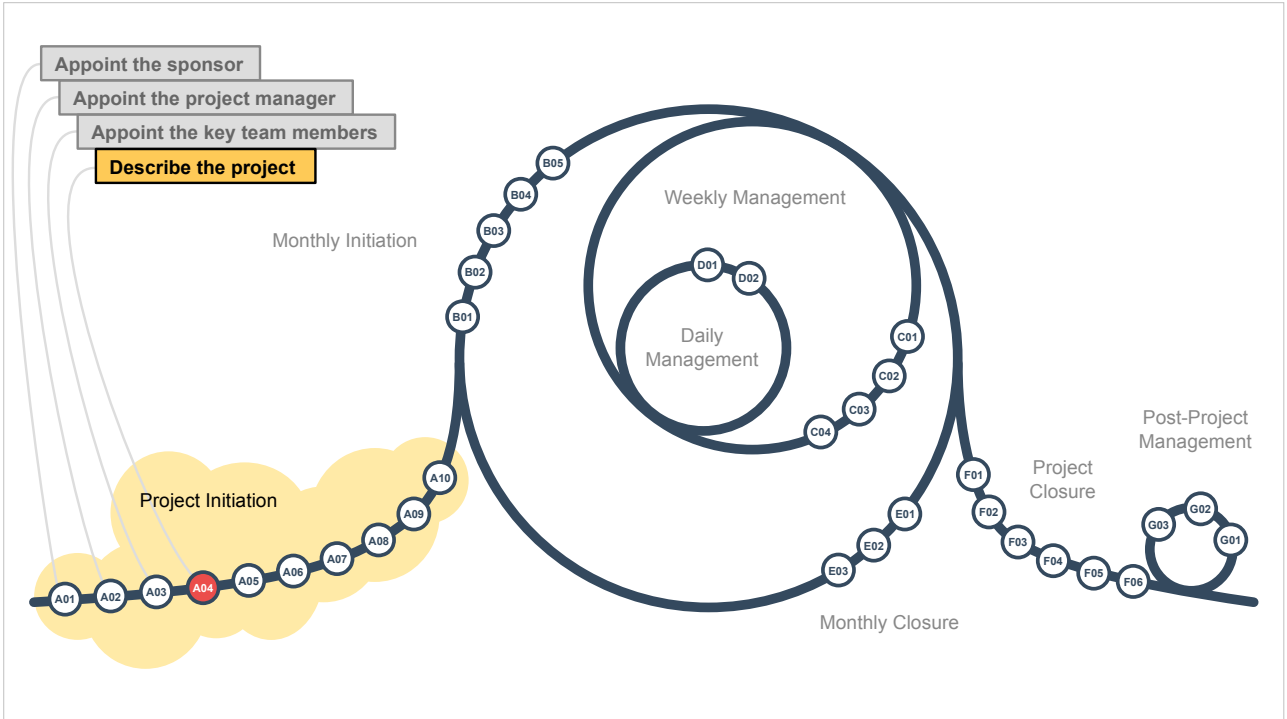


Project Initiation



When insisting that the same people who will execute the project should be initiating it, some may say that such a team is incapable of initiating the project because, for example, they don't have contract management expertise.

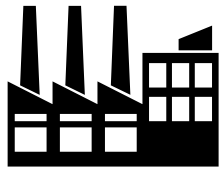
The solution is simple: Do we need contract management expertise to initiate the project? Then a person from that department must be appointed to the project to ensure initiation is done correctly from that viewpoint. While we do that, we can keep that team member for the whole project duration (part-time, of course) to ensure those concerns are addressed continuously.



What information would you gather to create a high-level description of a project?



Collect their ideas, merge or split them, and then organize them. If something doesn't belong here, explain where it should be done and why. Then arrange the remaining ones to match what we have in the following slides, and continue with those slides to explain how each one is done.



Describe the project!



① #####

② #####

③ #####

④ #####

⑤ #####

World #41

World #42



World #41

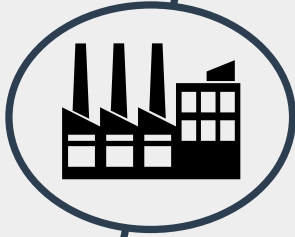
World #42

We're doing this project mainly to earn money.



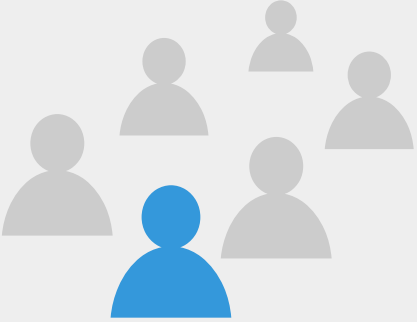
World #41

World #42



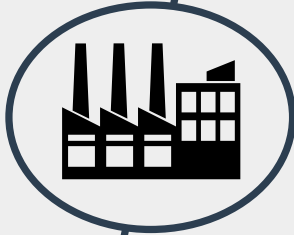
We're doing this project mainly to earn money.

Then it's OK to reduce quality to the minimum acceptable level to recover from a delay.



World #41

World #42

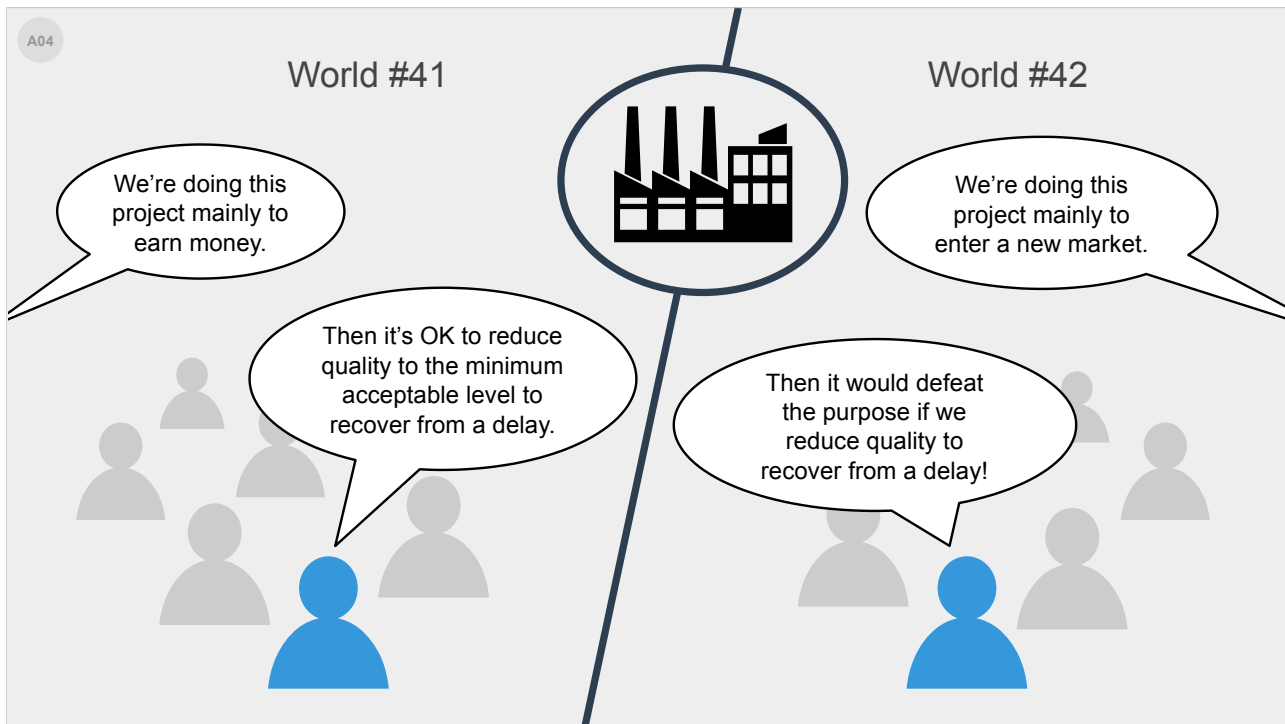


We're doing this project mainly to earn money.

We're doing this project mainly to enter a new market.

Then it's OK to reduce quality to the minimum acceptable level to recover from a delay.





Imagine a project in two different worlds. Everything is the same except that in one world, it's being done to earn money, whereas, in the other, it's being done to enter a new market. This makes a difference in important decisions we make in the project; e.g., if there's a delay and we must recover from it, and the two possible options are to spend more money or lower quality to an acceptable level, the latter would be appropriate for the first world and the former for the second world.

This simple example shows why we should pay attention to why we're doing the project and include it in the project description.



Describe



① Purpose and expected benefits

② ##### ## #####

③ ##### ##### #####

④ ##### ##### ##### #####

⑤ ##### ## #####



Otherwise similar projects with different purposes may have to be run differently

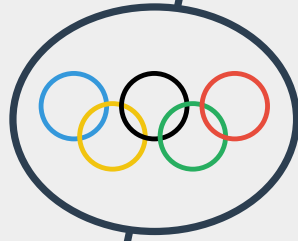
To ensure we can satisfy the purpose.

If you have questions, this information usually comes from a business case. Unlike many other structured methods, we don't have a business case artifact inside the project because P3.express considers it a program and portfolio artifact. We can't expect the people inside the project to have enough information and expertise to compose a business case. It must be created at higher organizational levels and sent to the project. Inside the project, we'll reflect some of its key information in the Project Description and use it throughout the project.

During the Monthly Initiation activities, we'll update our plans and send them to the sponsor for a go/no-go decision. Behind the scenes, this information should be used by higher levels to update the business case and see whether or not we should continue the project.

World #35

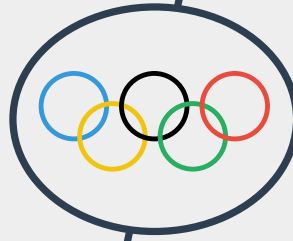
World #36



World #35

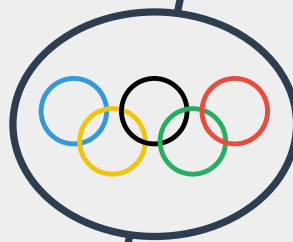
World #36

It must be finished in 18 months, otherwise it would be a disaster!



World #35

World #36



It must be finished in 18 months, otherwise it would be a disaster!

Then we should reduce quality to the minimum acceptable level to recover from a delay.



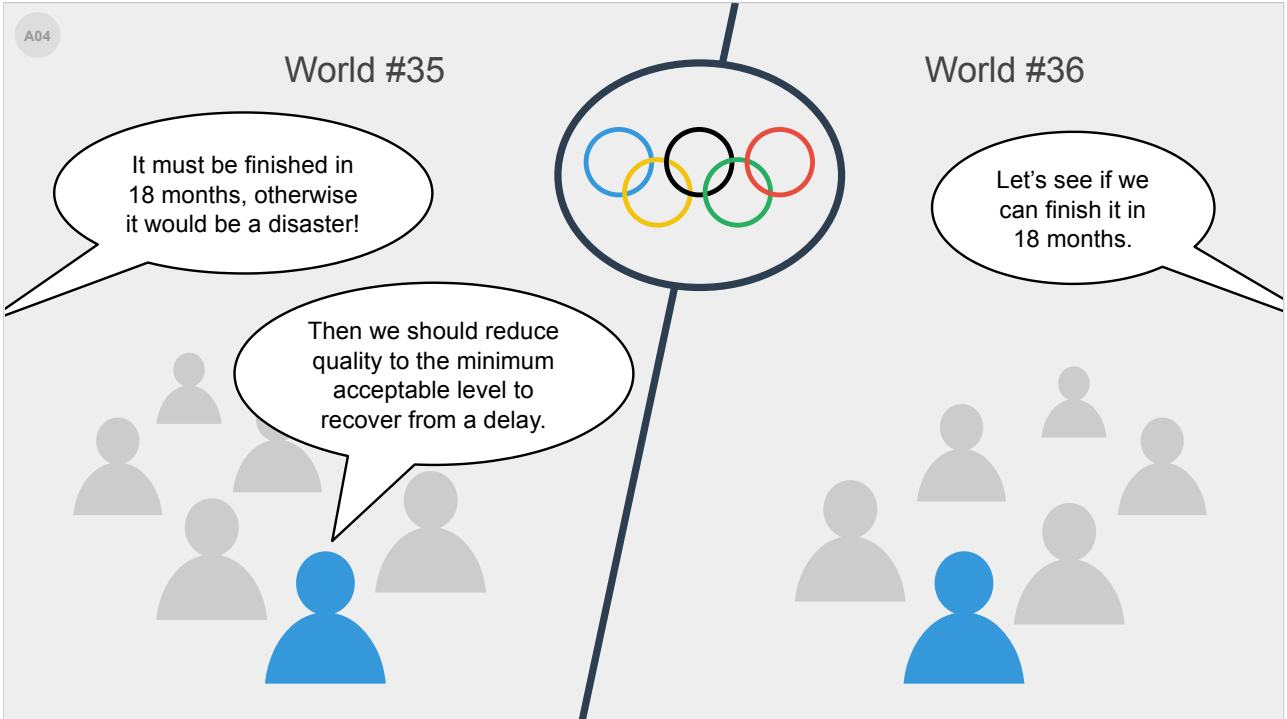
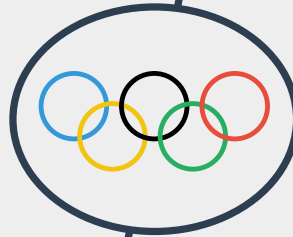
World #35

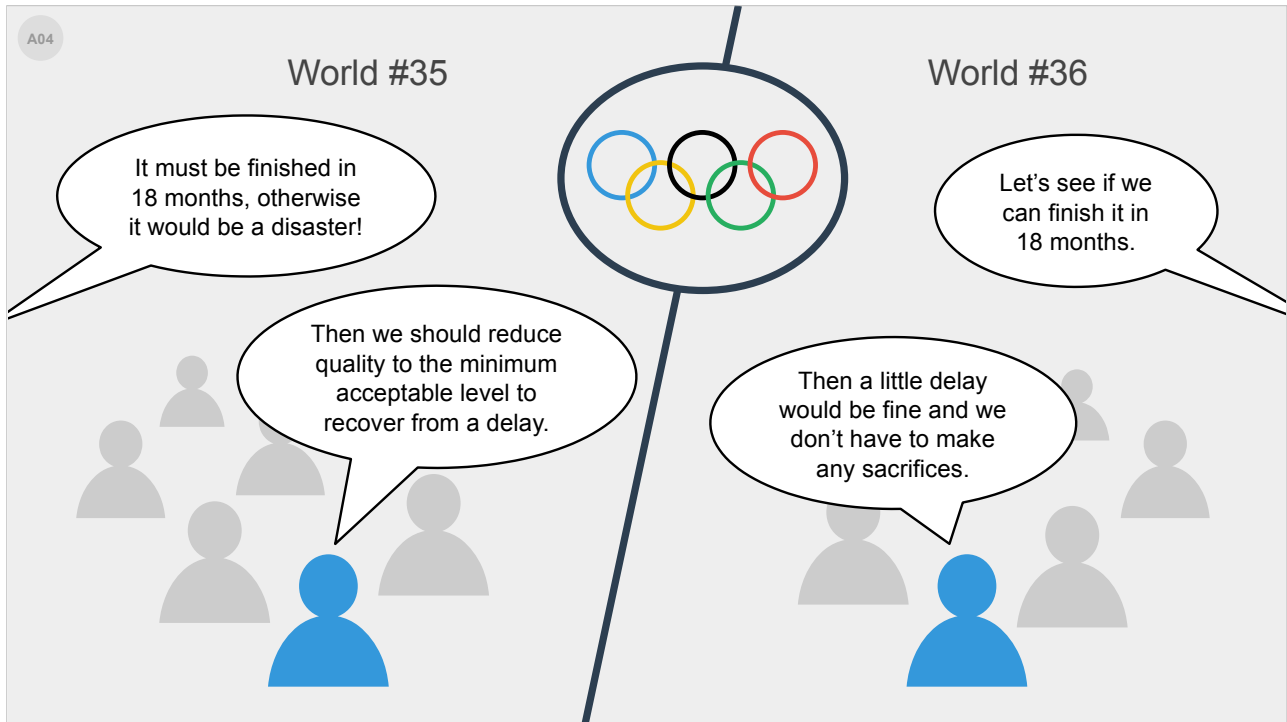
It must be finished in 18 months, otherwise it would be a disaster!

Then we should reduce quality to the minimum acceptable level to recover from a delay.

World #36

Let's see if we can finish it in 18 months.





These two projects have fixed duration (left) vs. dynamic duration with a target value (right), and it changes the way we make high-level decisions.



Describe the project!



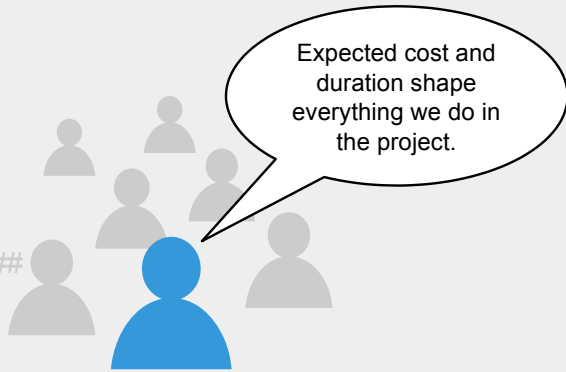
1 Purpose and expected benefits

2 Expected cost and duration

3 ##### ##### ##### #####

4 #### ##### ##### ##### ##

5 ##### ## #####

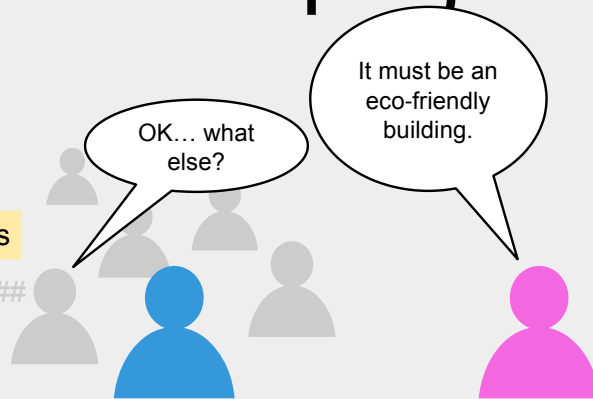




Describe the project!



- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ #####
- ❺ #####



Some people find it challenging to differentiate requirements from deliverables; e.g., “it should be eco-friendly” is a requirement that can be translated to various sets of deliverables, but “it should have solar panels” describes a deliverable.

We must start with requirements, even when the deliverables are fixed by a requesting body (e.g., an external customer) because they help us better understand the deliverables.

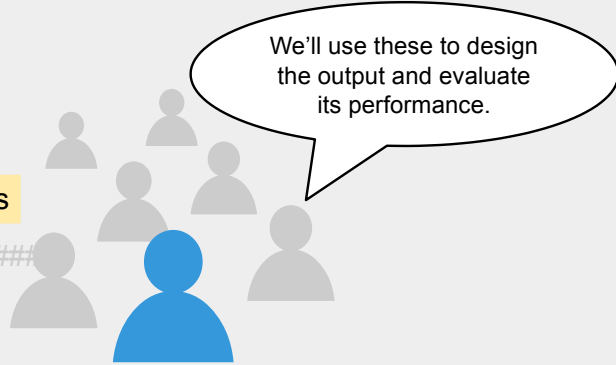
How much you need to explain this concept depends on your audience.

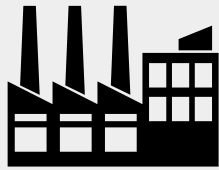


Describe the project!



- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ #####
- ❺ #####

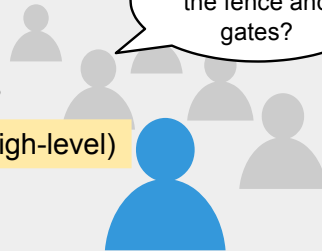




Describe th



- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ In-scope and out-of-scope elements (high-level)
- ❺ ##### ## #####

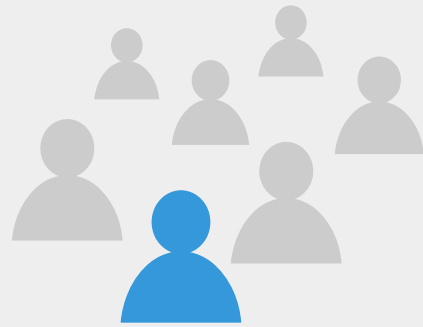
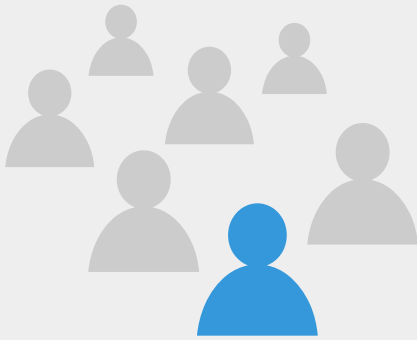
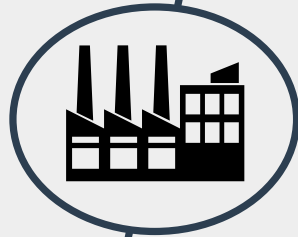


How about the fence and gates?

Someone else will build the access roads... you don't have to worry about them.

World #66

World #67



World #66

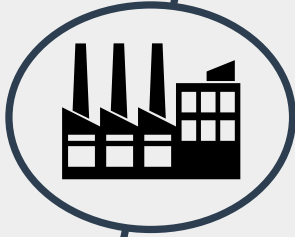
World #67

I don't have time for this! Talk to someone else.



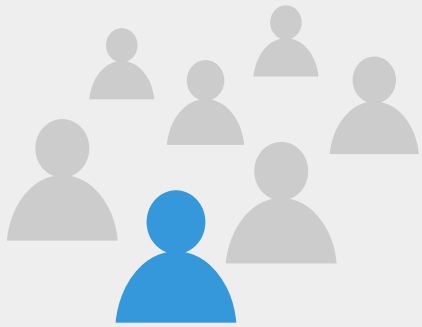
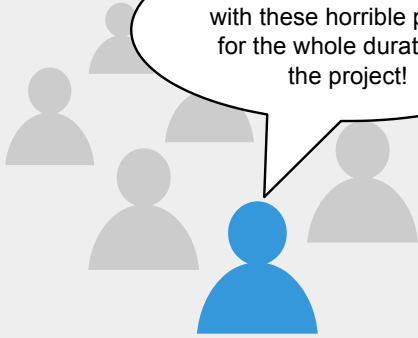
World #66

World #67



I don't have time for this! Talk to someone else.

Oh... we have to deal with these horrible people for the whole duration of the project!



World #66

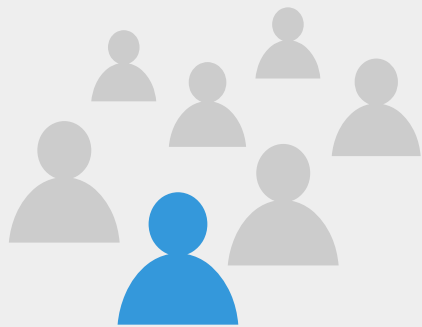
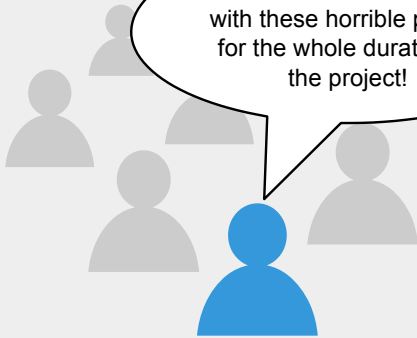
World #67

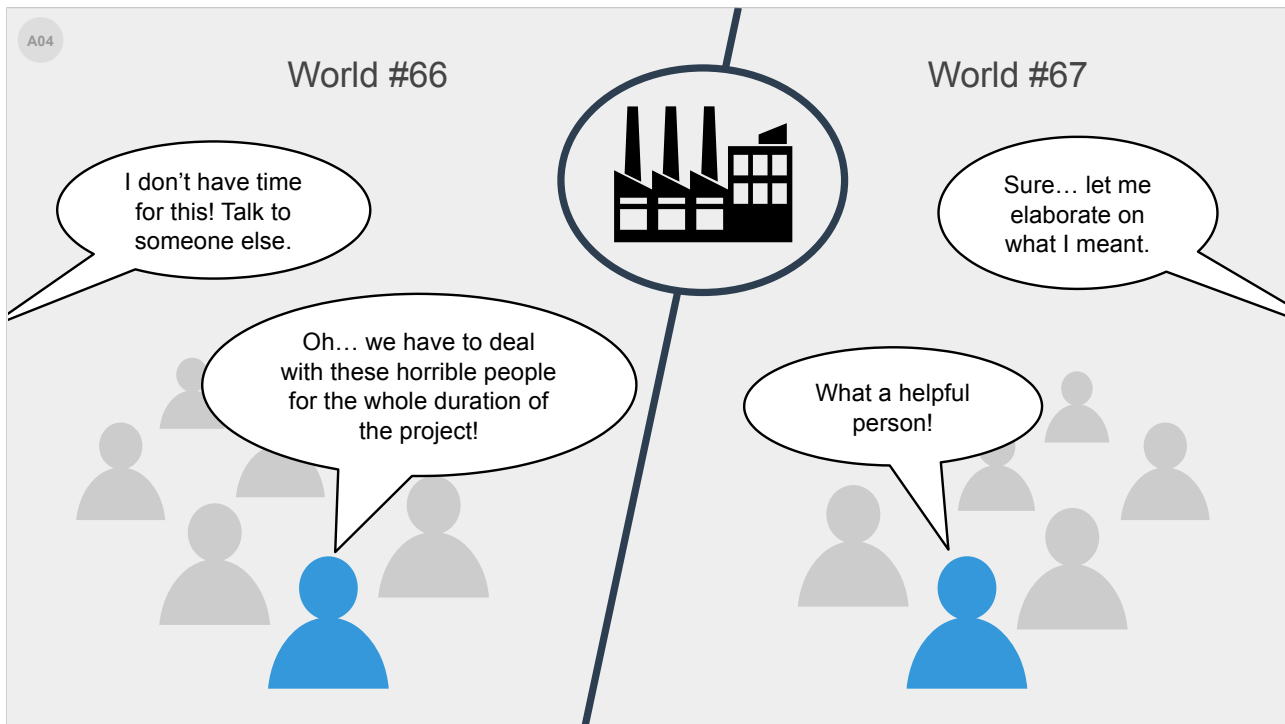


I don't have time for this! Talk to someone else.

Sure... let me elaborate on what I meant.

Oh... we have to deal with these horrible people for the whole duration of the project!





Two projects that are otherwise the same, one with difficult stakeholders and the other with reasonable ones, would go on very differently. That's one of the many reasons we need to identify stakeholders.

If you want, you can spend more time here and discuss other reasons with the learners. The most important reason is to identify requirements. For example, suppose there's a regulatory body that relates to the project, and you identify it on time. In that case, you can consider their requirements in designing the product and avoid rework and other troubles later on.

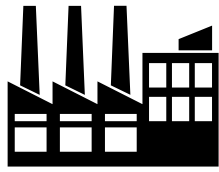


Describe the project!



- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ In-scope and out-of-scope elements (high-level)
- ❺ List of stakeholders



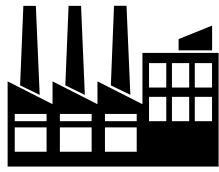


Describe the project!



- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ In-scope and out-of-scope elements (high-level)
- ❺ List of stakeholders


A **stakeholder** is anyone who has an interest in the project and can impact it; e.g., customer, suppliers, competition, and regulators.



Describe the project!



- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ In-scope and out-of-scope elements (high-level)
- ❺ List of stakeholders



Check archives
of old projects for
inspiration.

It doesn't matter how well we describe the project, we may still miss a few things. If we look at the archives of similar projects we've done in the past, they may remind us of things we've missed (e.g., some of the stakeholders) or inspire us for improvements.

It's a great opportunity we shouldn't miss, and it's only possible when we have proper documentation and archival. We'll directly or indirectly insist on or remind the importance of those aspects throughout the course.

Project Description

- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ In-scope and out-of-scope elements (high-level)
- ❺ List of stakeholders

Project Description

- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ In-scope and out-of-scope elements (high-level)
- ❺ List of stakeholders

Anyone can understand what the project is by reading this document.

In other words, it must be clear and understandable.

Most people are used to writing “corporate style” descriptions that are hard to understand and contain little to no useful information. It’s best to write it as if you’re doing it for your future self or describing the project to an ex colleague.

Project Description

- ❶ Purpose and expected benefits
- ❷ Expected cost and duration
- ❸ Requirements and quality expectations
- ❹ In-scope and out-of-scope elements (high-level)
- ❺ List of stakeholders

Anyone can understand what the project is by reading this document.

One or two pages of simple text.

One or two pages of description are enough for more projects. One might think that a longer document is better because it can contain more information, whereas in longer documents the unnecessary details cast a shadow on the important ones and make it less effective.

Project Description

- 1 Purpose and expected benefits
- 2 Expected cost and duration
- 3 Requirements and quality expectations
- 4 In-scope and out-of-scope elements (high-level)
- 5 List of stakeholders

Anyone can understand what the project is by reading this document.

One or two pages of simple text.

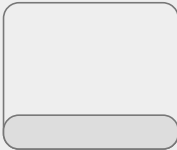
Will be updated throughout the project

For example, we will add new stakeholders to the list or update the information of the existing ones.

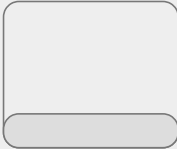
1



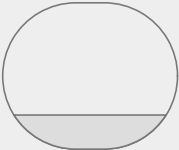
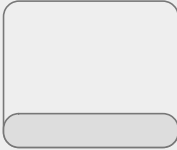
2

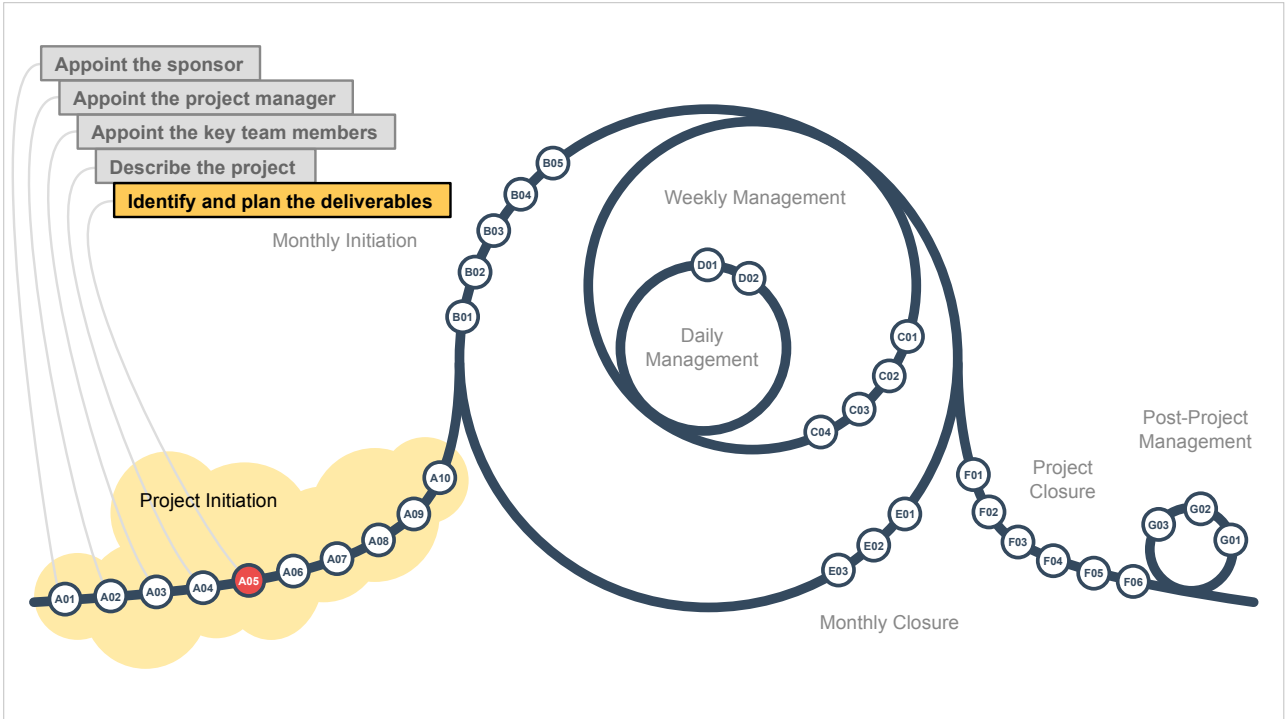


3



4

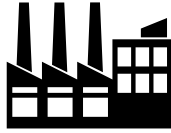


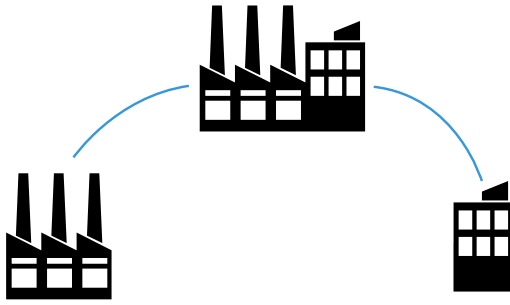


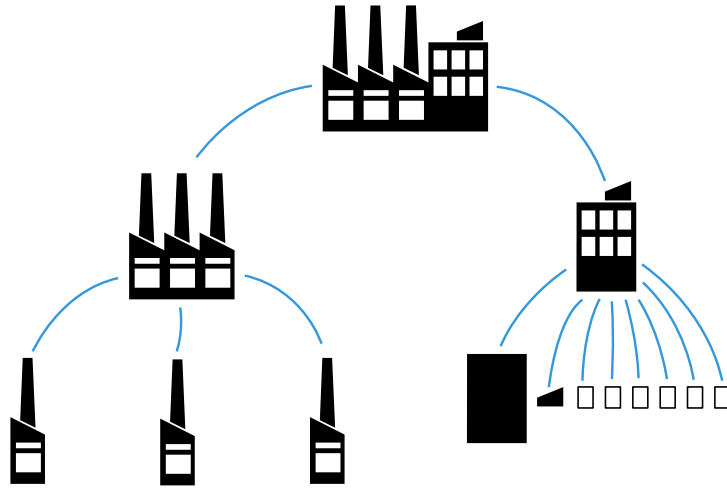


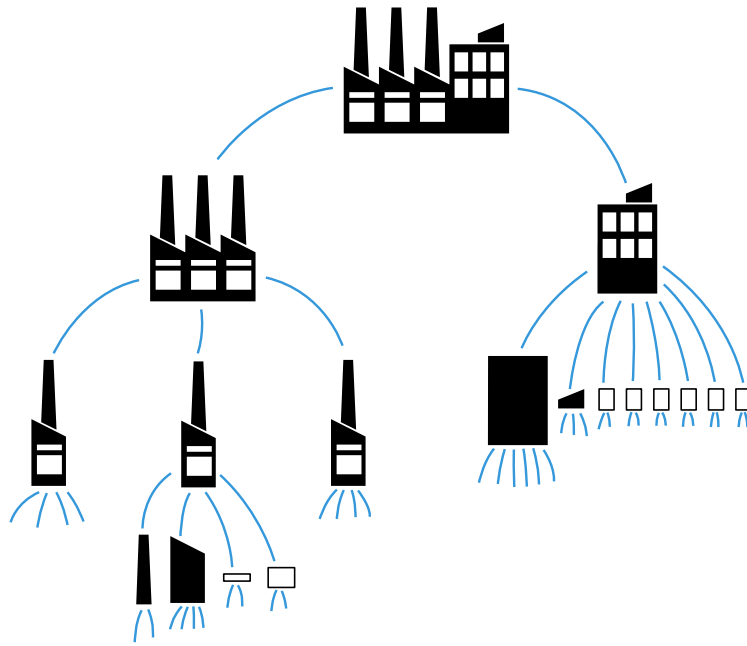
What are the building elements of the output?

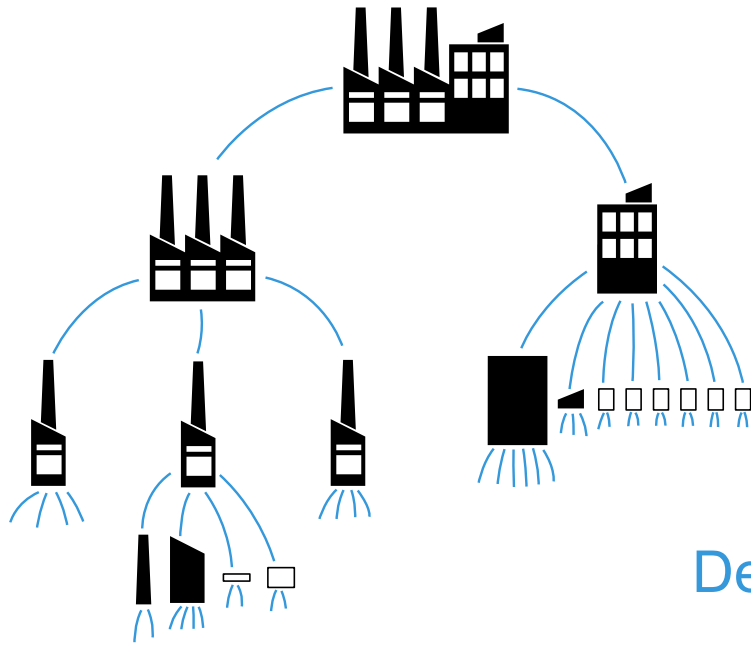
(and their supporting elements)



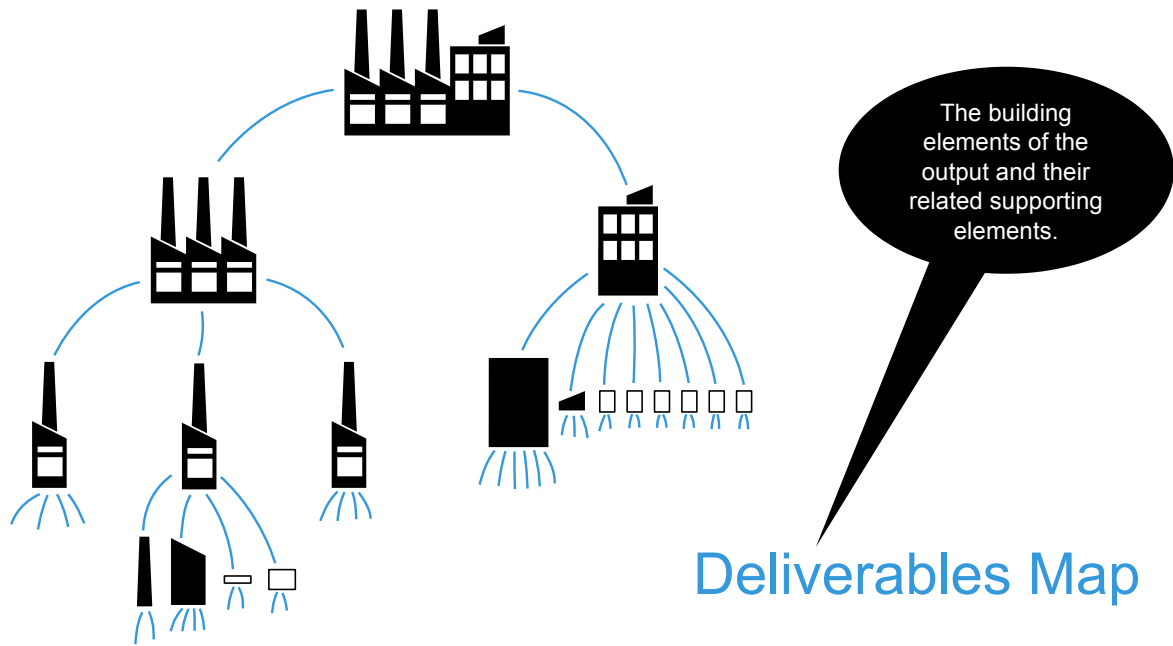








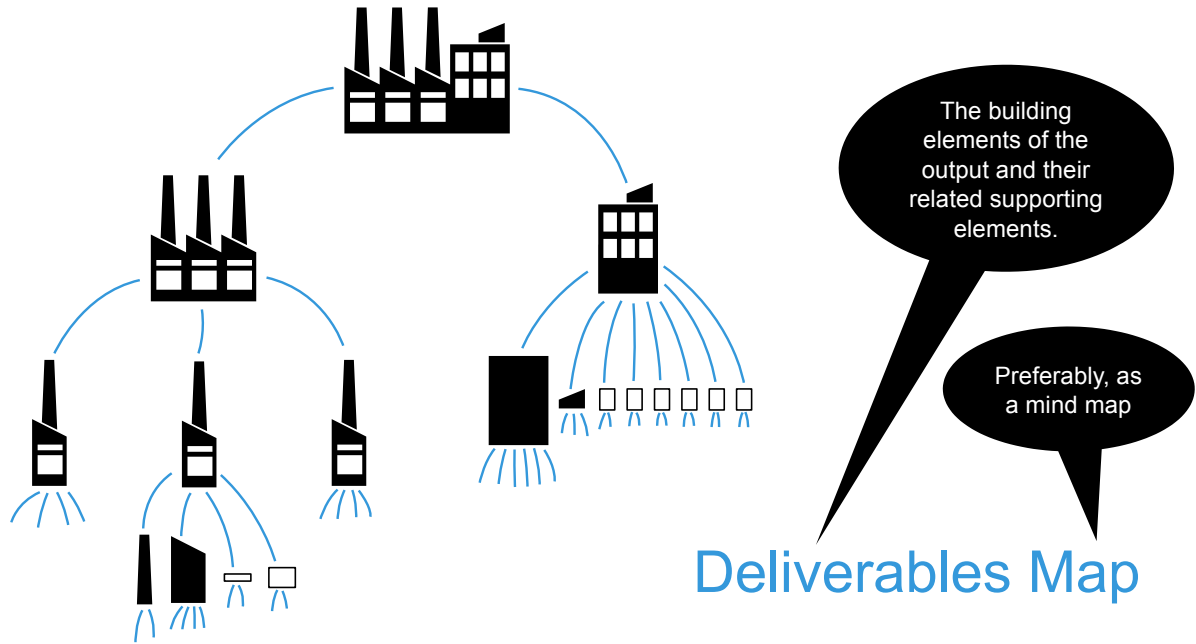
Deliverables Map



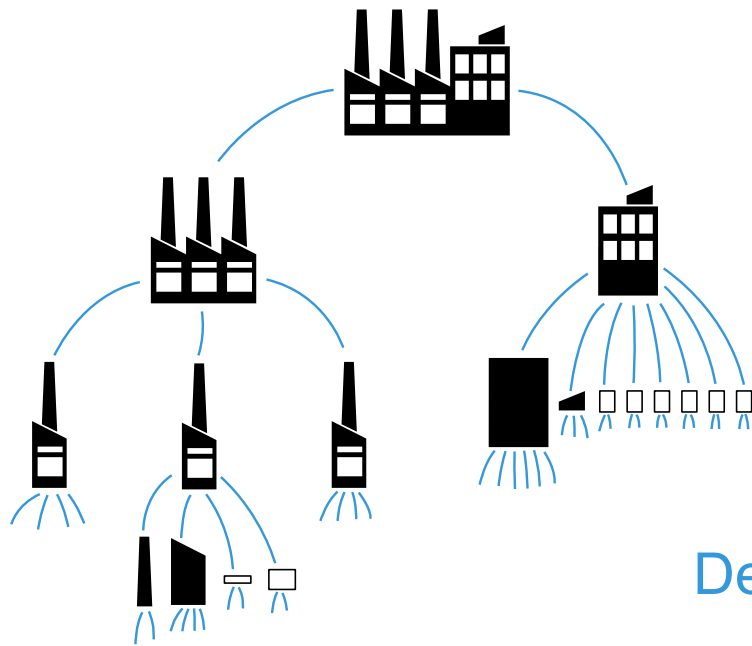
If you have questions: the Deliverables Map is the same concept as the product breakdown structure (PBS) in PRINCE2 and the work breakdown structure (WBS) in the PMBOK Guide and most other resources.

P3.express uses a different term because most people misunderstand WBS and PBS, and it's hard to fix it. "Deliverables Map" is clear, straightforward, and descriptive.

There are different ways of mapping deliverables (creating a breakdown); some are much more effective than others. It's an art, and not the easiest one. You may be tempted to go through examples and spend a lot of time practicing it with your learners, but we don't recommend it: A relatively poorly-made map with a complete P3.express structure works much better than a perfect map without a structured system. So, let's take it easy and let them learn the whole structure without distracting them with details. If you want and have enough time, return to this topic after finishing the course and have an advanced mini-workshop about mapping deliverables.



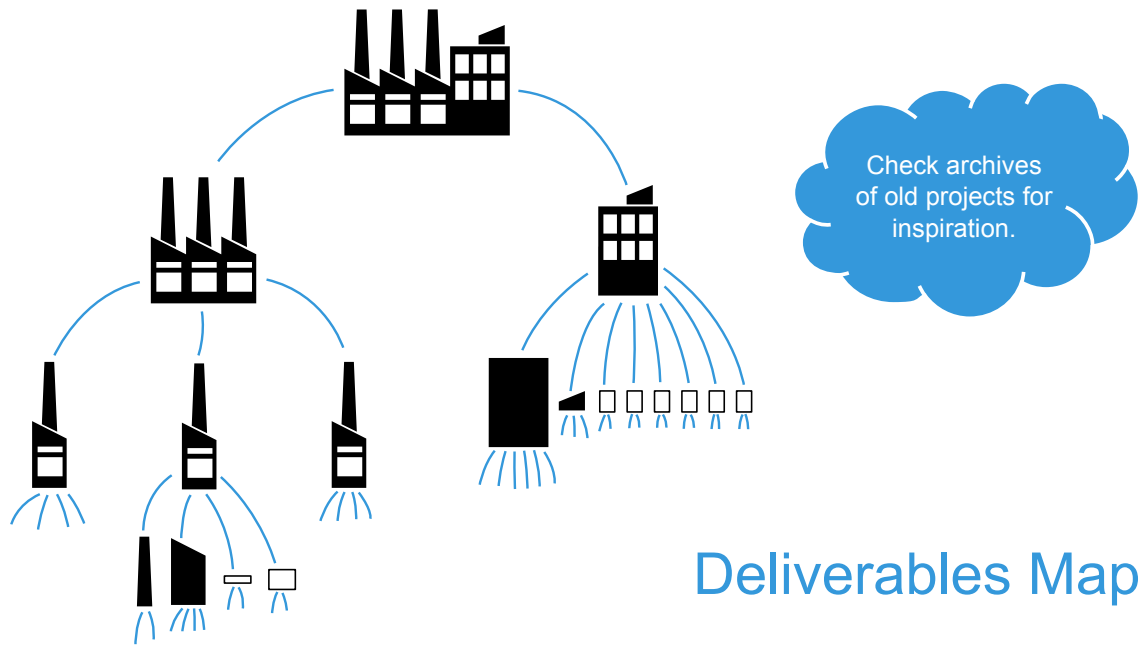
When brainstorming to compose the map for the first time, it's probably best to use a mind map. After that, you can present the map as a mind map, an outline, or any other form you want. The choice of tools one uses will also significantly impact the format.



A high-level map is
enough for now.
We'll detail it in
Monthly Initiations.

Deliverables Map

Project initiation creates a high-level plan unless, for some reason, we must have a detailed one upfront.



As usual, checking the old archives is an excellent source of inspiration for improving our work and finding the missing elements.

It's a good idea to spend enough time on this concept throughout the project, as it's one of the most practical takeaways for everyone.

How would you create a Deliverables Map for a website that sells ebooks?



It can have different forms: those that map technical-oriented deliverables and those that focus on user-oriented deliverables. We won't spend time talking about their difference and suggesting one. An example map is the following:

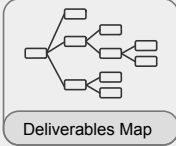
- Website
 - Home page
 - Latest ebooks
 - Last viewed
 - Highly rated
 - Personal suggestions
 - Ebook pages
 - Book information
 - Sample chapters
 - Purchase options
 - Account page
 - Personal information
 - Previous orders
 - Order pages
 - Order information
 - Downloadable invoice
 - Downloadable product(s)
 - Etc.

1

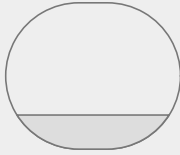


Project Description

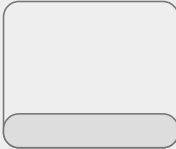
2



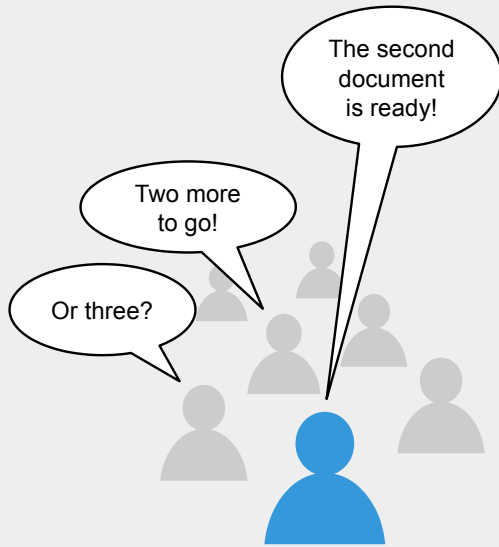
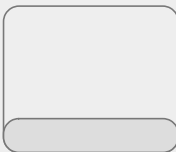
Deliverables Map



3



4



Or three?

Two more to go!

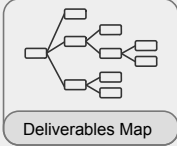
The second document is ready!

1

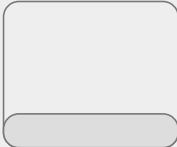


Usually a mind map

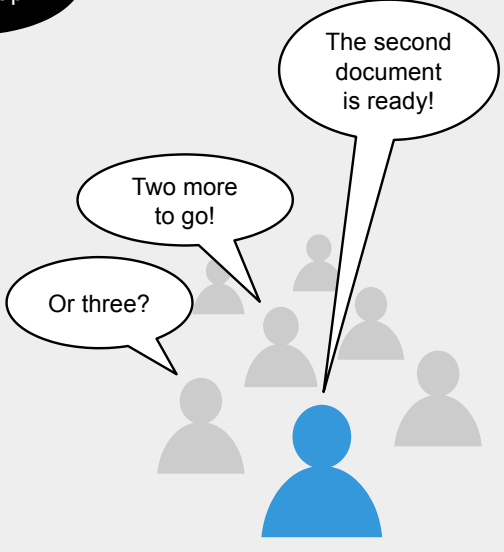
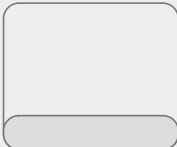
2



3



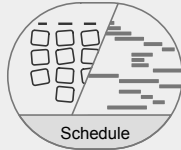
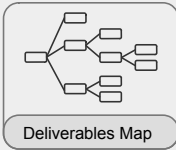
4



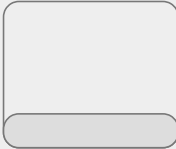
1



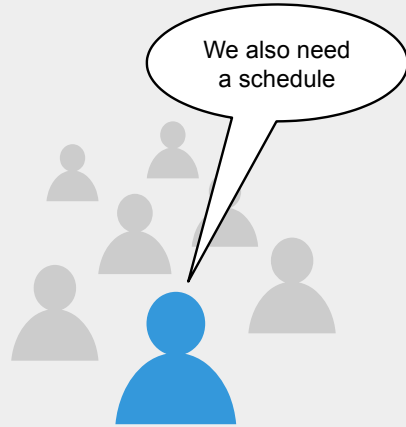
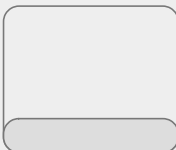
2



3



4

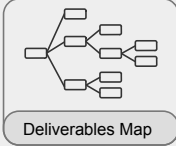


1

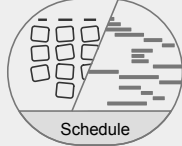


Project Description

2



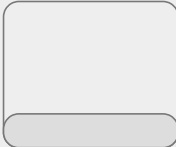
Deliverables Map



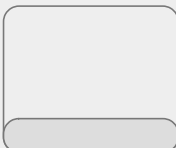
Schedule

Order of working on deliverables

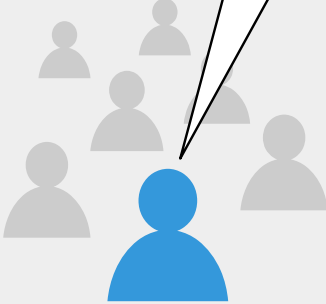
3



4

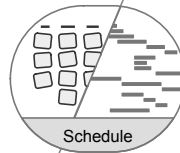
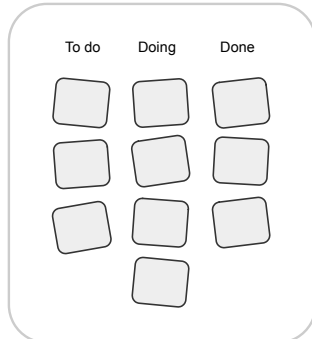


We also need a schedule



Priority-based

Deliverables do not have many dependencies and their order can be freely set based on various priorities; e.g., IT development projects.



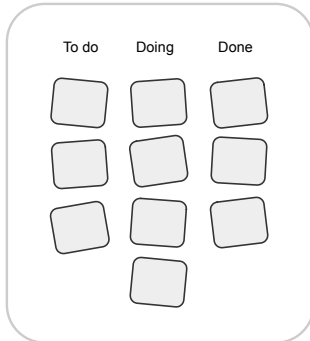
Dependency-Based

The order of working on deliverables is mainly driven by dependencies among them; e.g., construction projects.

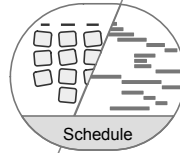


Priority-based

Deliverables do not have many dependencies and their order can be freely set based on various priorities; e.g., IT development projects.



Usually visualized on a **[kanban] board**,
And ordered using multiple [subjective] criteria.



Dependency-Based

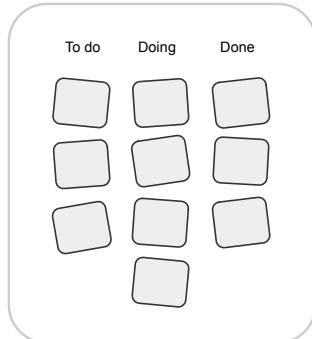
The order of working on deliverables is mainly driven by dependencies among them; e.g., construction projects.



Usually visualized with a **Gantt Chart**
and usually ordered using the **Critical Path Method**

Priority-based

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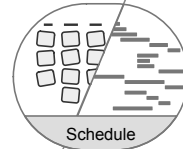
Usually visualized on a **[kanban] board**,
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The order of working on deliverables is mainly driven by dependencies among them; e.g., construction projects.



Usually visualized with a **Gantt Chart**
and usually ordered using the **Critical Path Method**

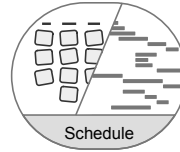
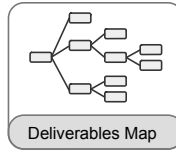


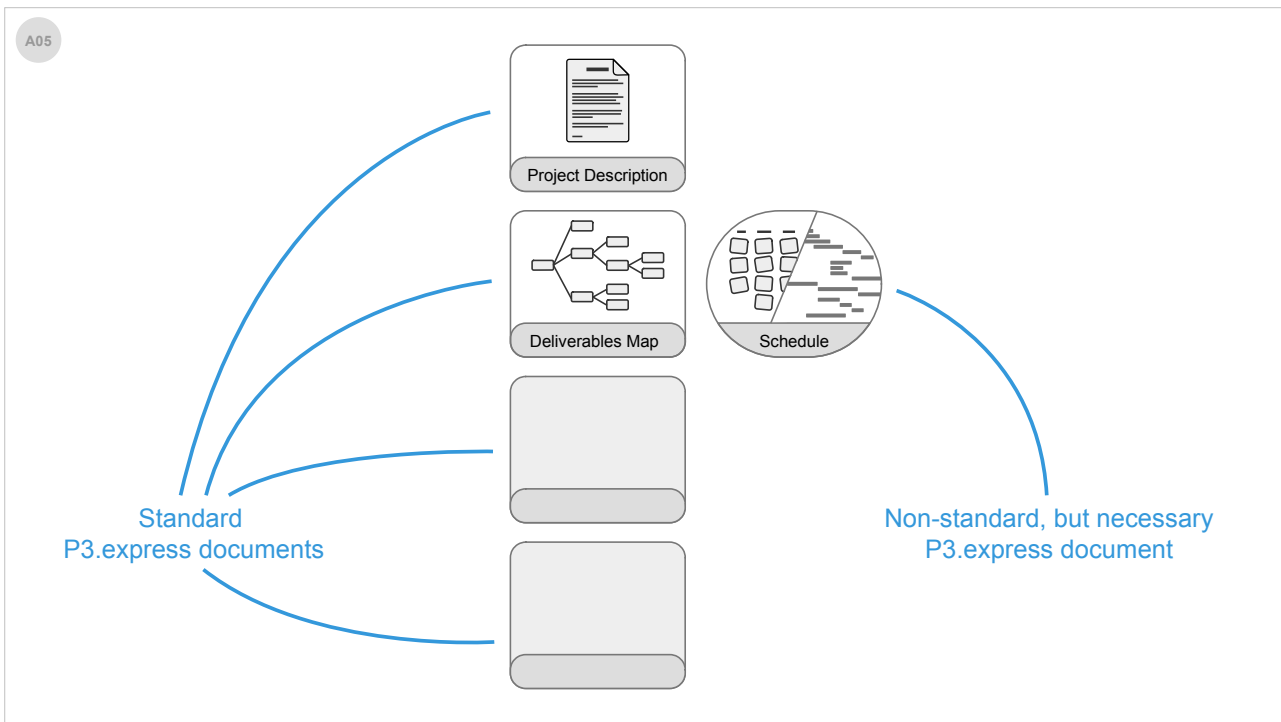
Check archives
of old projects for
inspiration.

Learning how to schedule is not part of P3.express, but it's necessary to know, and if you want, you can have a workshop about either or both scheduling methods after the course.

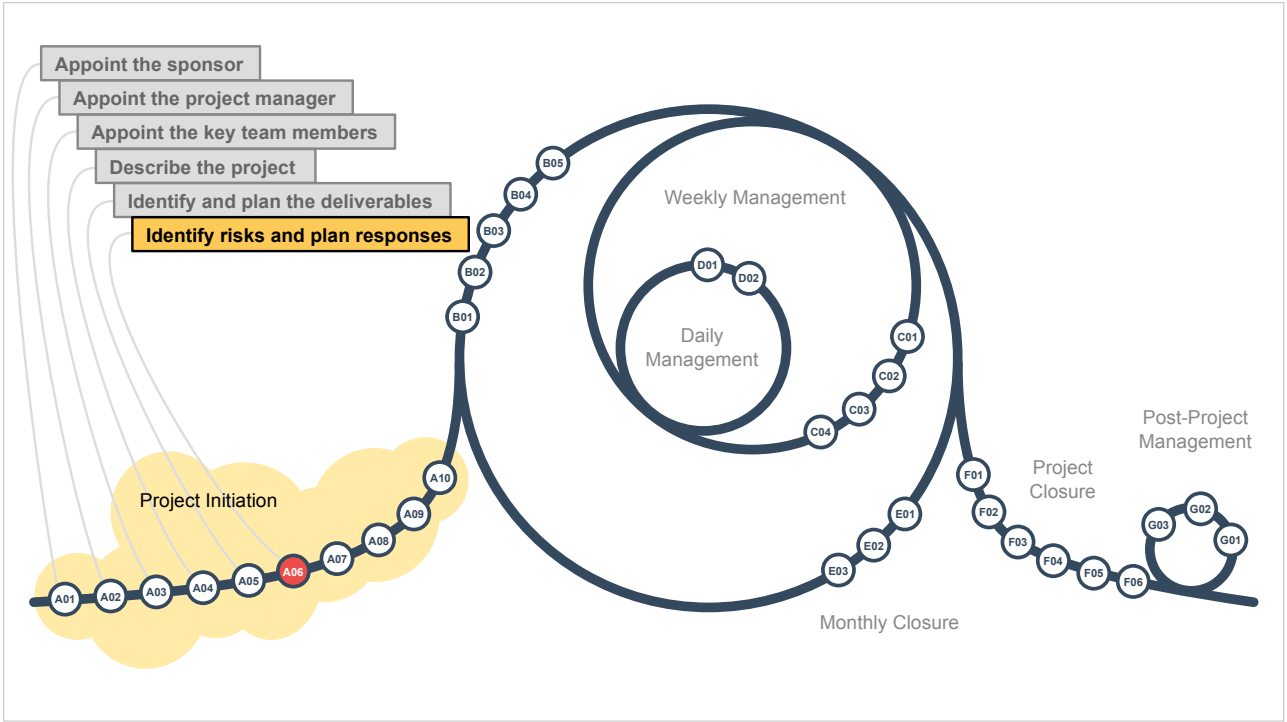
Note: P3.express also recognizes the combination of these two methods; dependency-based for the higher levels and priority-based for the lower levels. However, unfortunately, we're unaware of any software application that supports such a combination!

Standard
P3.express documents





So, there are 4 or 5 artifacts, depending on how you count. We currently count them as 4, but we may count them as 5 in the next version of P3.express to be clearer.



This material
doesn't match the
specification!

This material
doesn't match the
specification!

Issue

A current condition that may impact the project

This material
doesn't match the
specification!

If authorities pass the
proposed regulation, we
should redesign everything
to stay compatible with it!

Issue

A current condition that may impact the project

This material doesn't match the specification!

If authorities pass the proposed regulation, we should redesign everything to stay compatible with it!

Issue

A current condition that may impact the project

Risk

An uncertain future condition that may impact the project

This material
doesn't match the
specification!

If authorities pass the
proposed regulation, we
should redesign everything
to stay compatible with it!

Let's have fewer
unnecessary meetings
to stay more productive
and less distracted

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If authorities pass the proposed regulation, we should redesign everything to stay compatible with it!

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An uncertain future condition that may impact the project

Improvement Plan

An ad hoc plan for improving future work

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The customer wants
a new feature...

Issue

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An uncertain future condition that may impact the project

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The customer wants
a new feature...

Issue

A current condition that may impact the project

Risk

An uncertain future condition that may impact the project

Improvement Plan

An ad hoc plan for improving future work

Change Request

A proposal for changing a plan or design

This material
doesn't match the
specification!

If authorities pass the
proposed regulation, we
should redesign everything
to stay compatible with it!

Let's have fewer
unnecessary meetings
to stay more productive
and less distracted

The customer wants
a new feature...

If we had a simple first
aid kit, it wouldn't have
become such a disaster!

Issue

A current condition that may impact the project

Risk

An uncertain future condition that may impact the project

Improvement Plan

An ad hoc plan for improving future work

Change Request

A proposal for changing a plan or design

This material
doesn't match the
specification!

If authorities pass the
proposed regulation, we
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Issue

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Improvement Plan

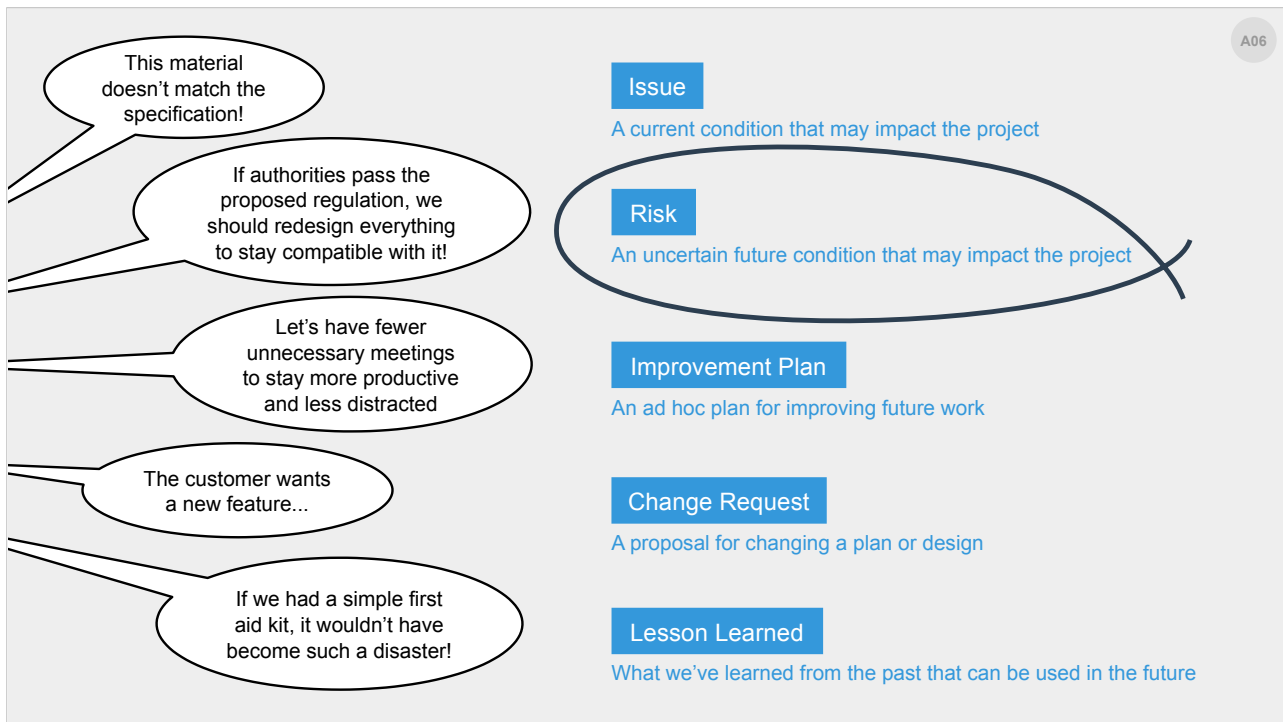
An ad hoc plan for improving future work

Change Request

A proposal for changing a plan or design

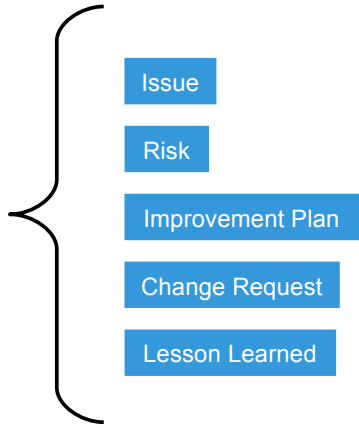
Lesson Learned

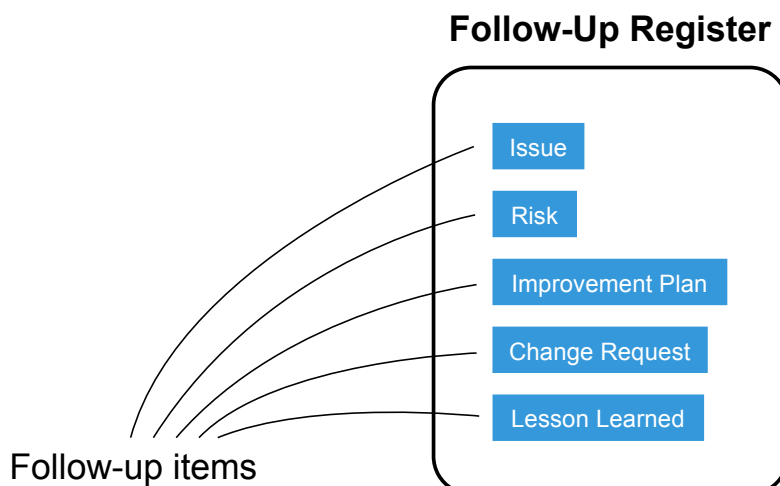
What we've learned from the past that can be used in the future



It's time to explain what a "follow-up item" is (next slide), which is any of these ad hoc items. For this management activity, however, we'll only focus on risks.

Need follow-up





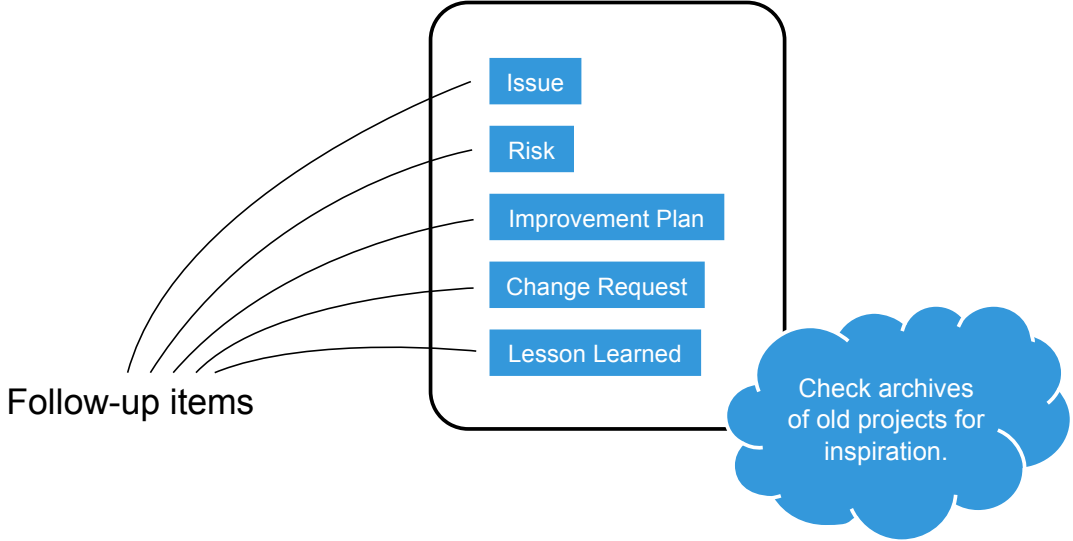
Some people add a column to their register to mention the type of item, which is not a good idea because each item in the register can morph from one form to the other: What's a risk today may become an issue in a few months, and when closed, it would be a lesson learned.

Besides the morphing concept, we also have a single process to work with all of them, and that's why they are in a single register.

Note: These items are not actions but sources of actions (response plans), the same way deliverables are not activities but have activities underneath.

After identifying risks in this activity, they should also plan responses for them when possible.

Follow-Up Register

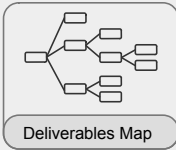


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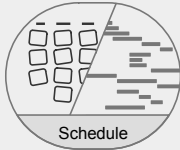


Project Description

2

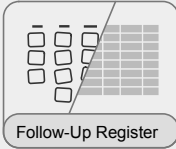


Deliverables Map



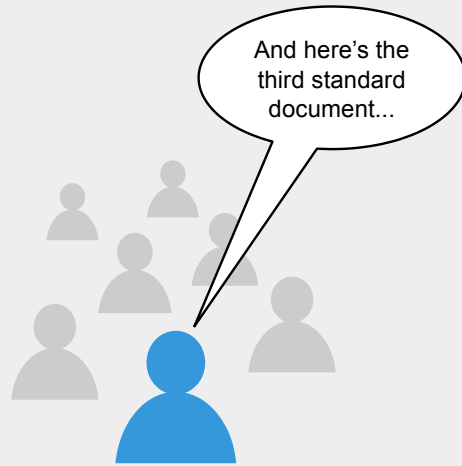
Schedule

3

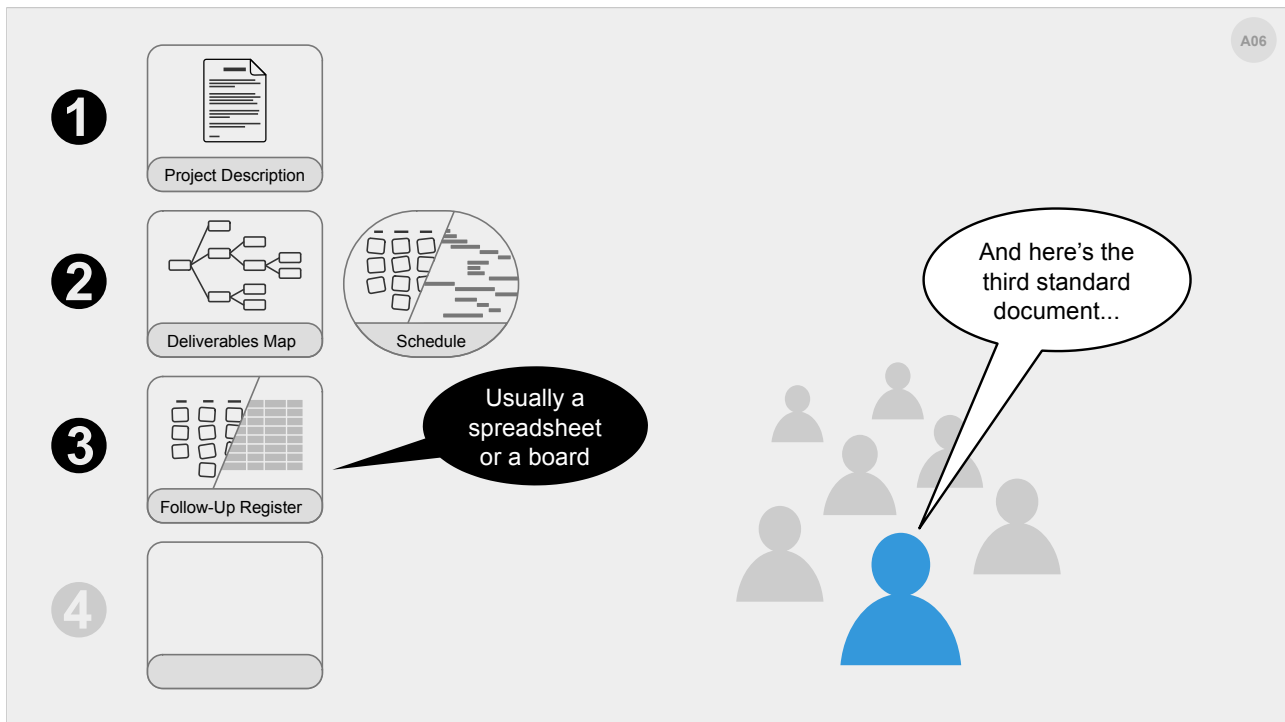


Follow-Up Register

4



And here's the third standard document...



A [Kanban] board probably works better than a spreadsheet because we can move items in columns to change their status and easily add more information to each card. Storing arbitrary sizes of text in a spreadsheet is not easy. Note that each item in the register is a potential lesson learned, and it's only possible when it's easy to gradually and organically add information to it.

A spreadsheet's advantage over at least some of the boards is flexible and capable reporting and analyzing. However, if you have to sacrifice either reporting and analyzing or ease of use and information-richness, the first one should be sacrificed.

Identify one risk with one or more responses for a project that aims to make a city center bicycle-friendly.

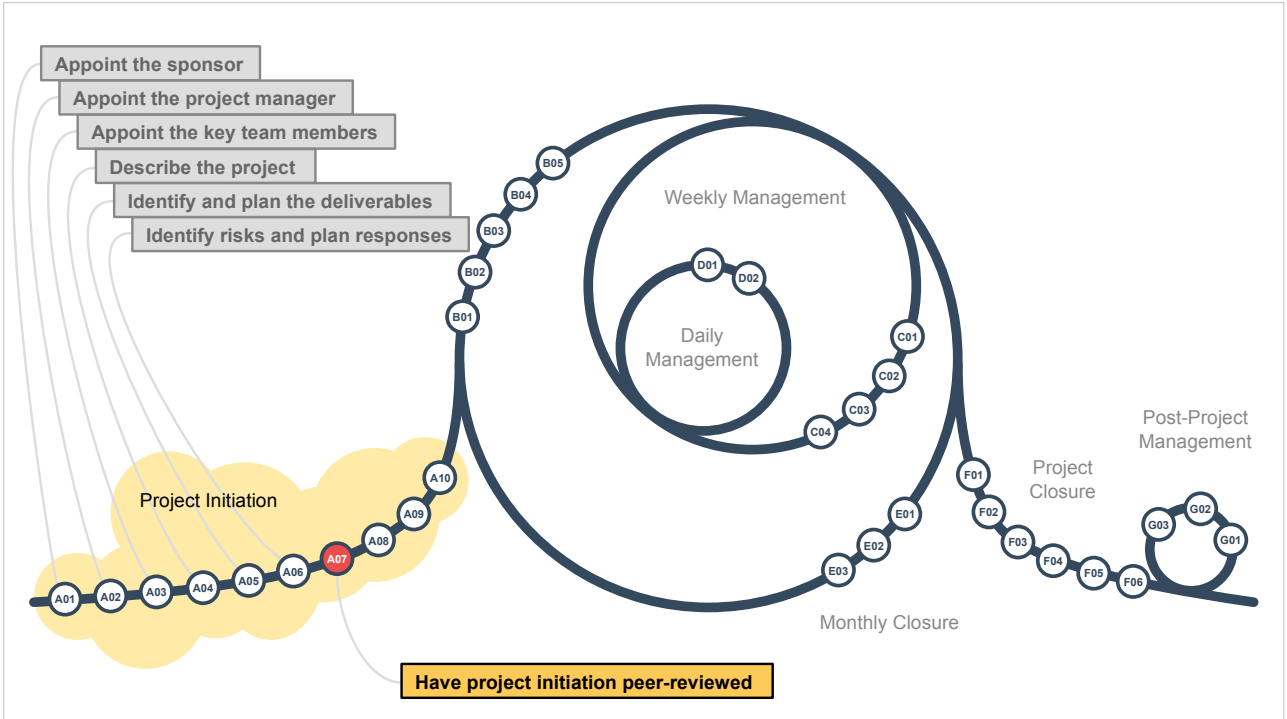


For example:

Cruz has heard that the local university may want to build a new hospital next to the Fish Market in the center. That place has perfect access for a hospital right now, but it won't be so after our changes, which would cause problems for them and us.

Responses:

- Let's find a relevant person in the university and ask about it to be sure. We can design further responses based on the result.
- Let's announce our plan publicly so that organizations like the university become aware of it and contact us if there's any potential conflict.
- Let's talk to Artophile Co (they had a similar project for their city a few years ago) and see how they managed this type of concern.

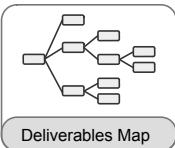


1

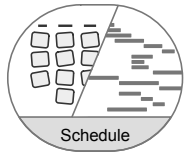


Project Description

2

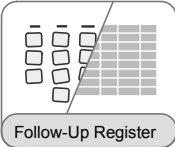


Deliverables Map



Schedule

3



Follow-Up Register

4



Project Manager

Peer Reviewer

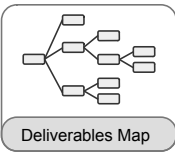
A person with project management expertise,
external to the project

1

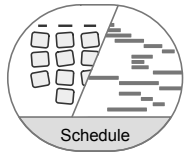


Project Description

2

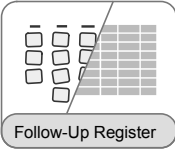


Deliverables Map



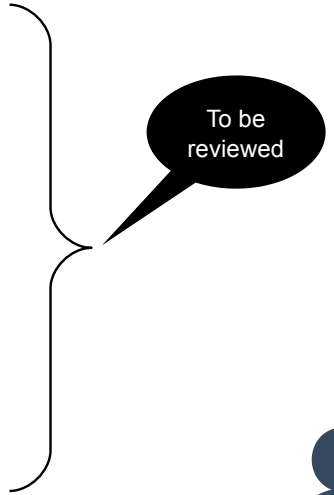
Schedule

3



Follow-Up Register

4



To be reviewed

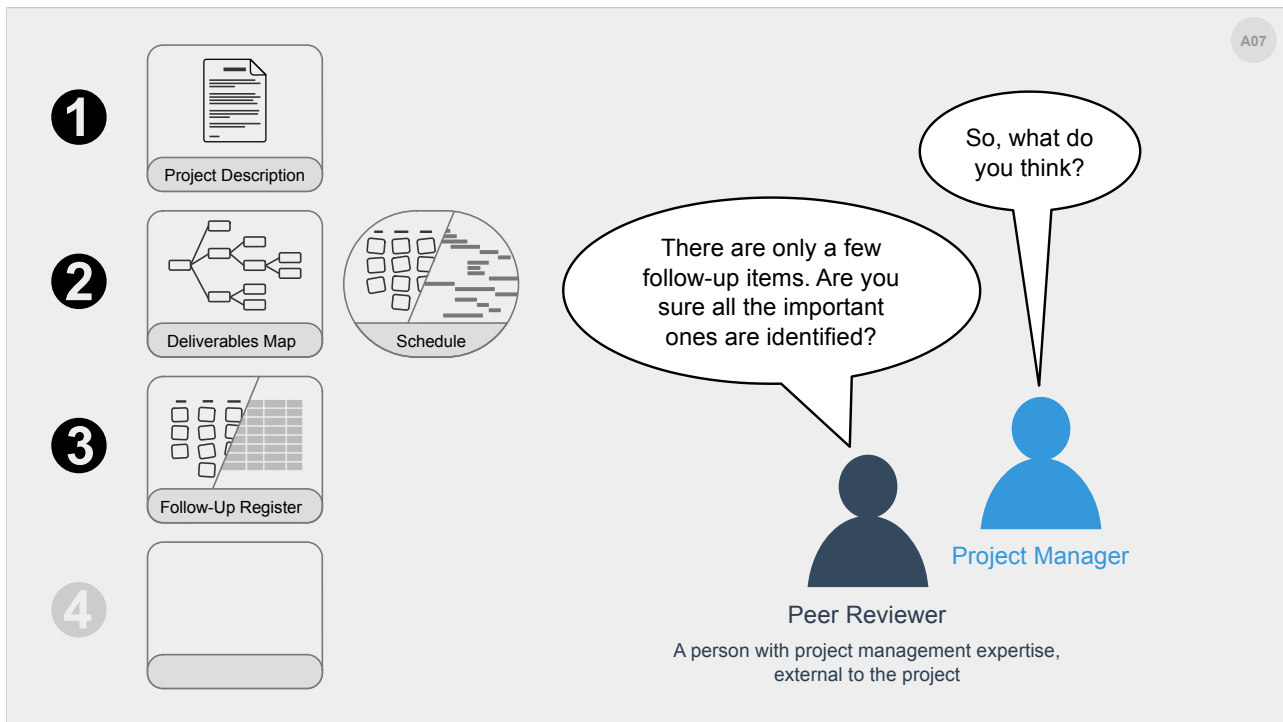


Peer Reviewer

A person with project management expertise, external to the project



Project Manager



The peer review can be based on filling in a questionnaire or based on a conversation.

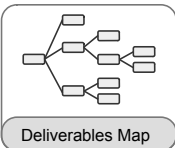
While P3.express initially leaned toward questionnaires, its use in projects in the past few years and the direct and indirect feedback collected showed that a conversation-based peer review works better. So, let's encourage your learners to have the latter.

1

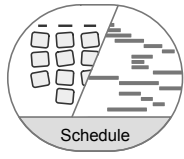


Project Description

2

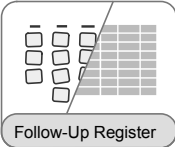


Deliverables Map



Schedule

3



Follow-Up Register

4



Project Manager

Peer Reviewer

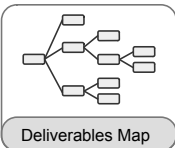
A person with project management expertise, external to the project

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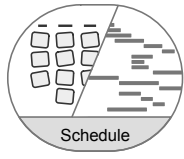


Project Description

2



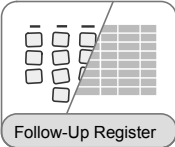
Deliverables Map



Schedule

Finding and fixing problems as soon as possible

3



Follow-Up Register

4



Peer Reviewer

A person with project management expertise, external to the project



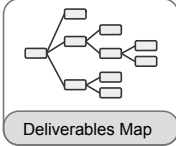
Project Manager

1

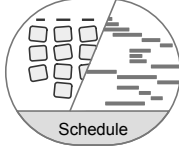


Project Description

2

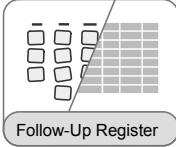


Deliverables Map



Schedule

3



Follow-Up Register

4



Finding and fixing problems as soon as possible

Close proximity sometimes prevents us from seeing our obvious problems.

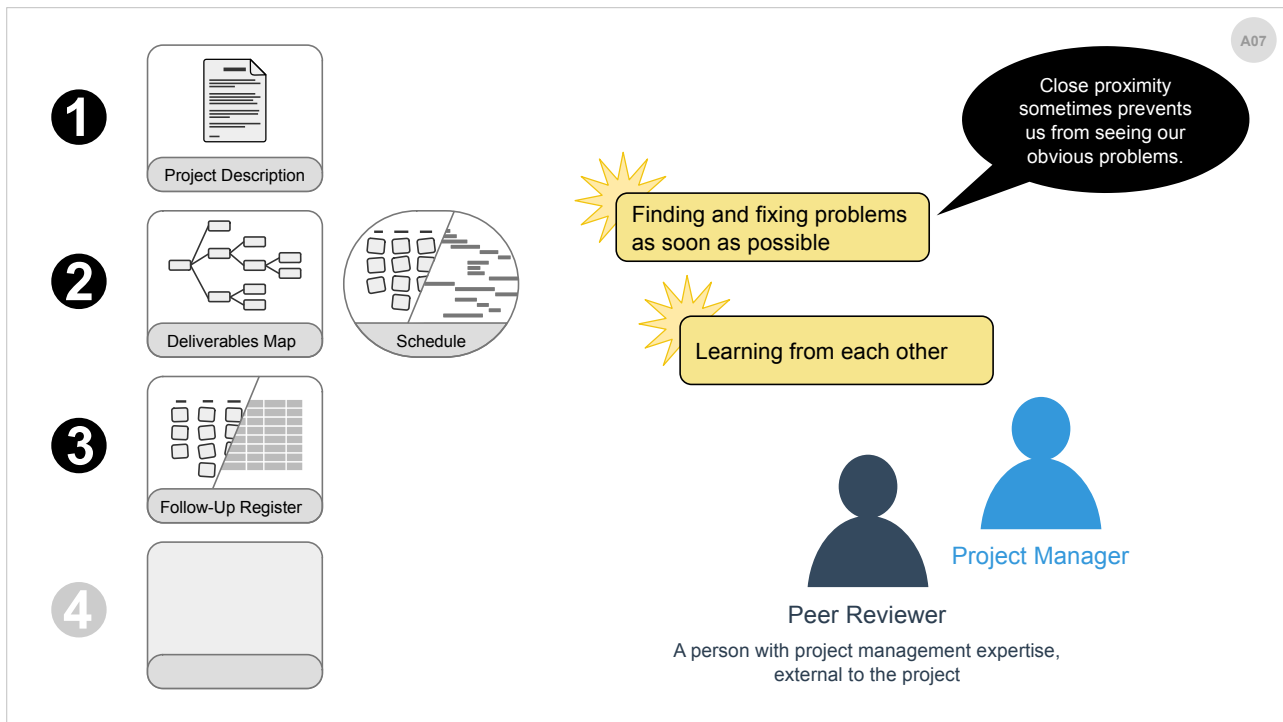


Peer Reviewer

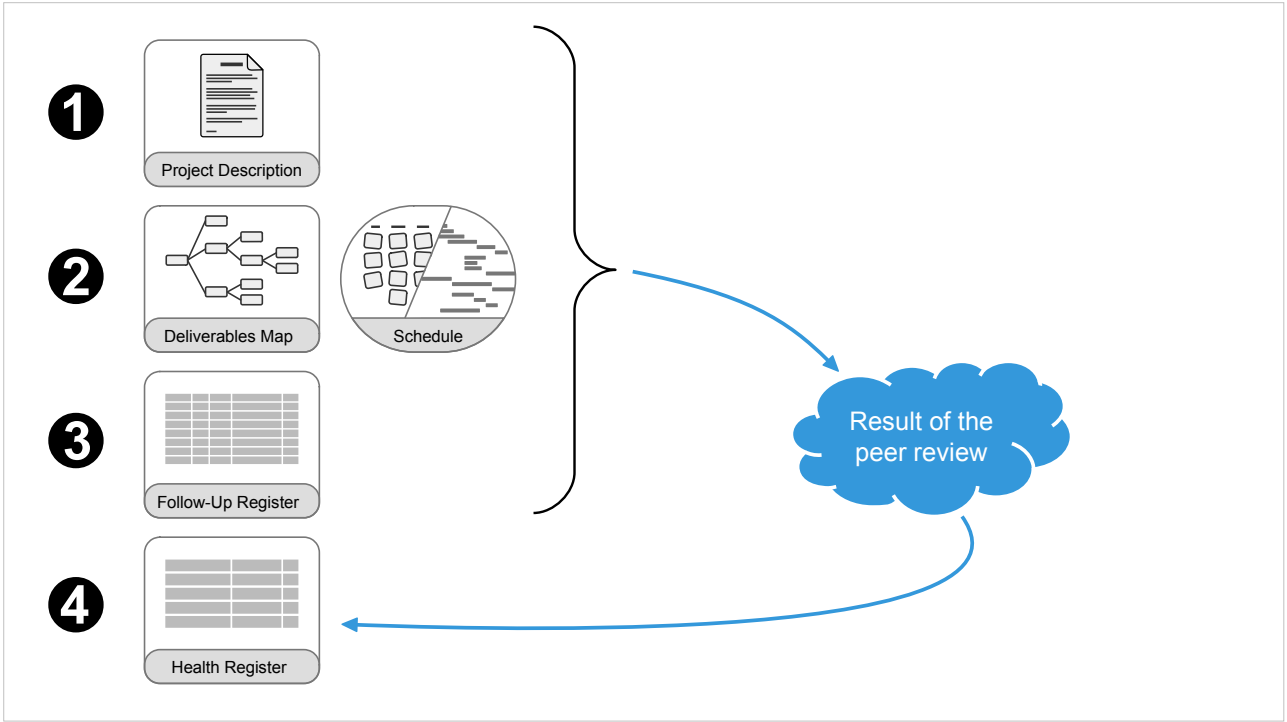
A person with project management expertise, external to the project



Project Manager



Your learners need to understand these two potential benefits of peer reviews and conduct them in a way that contributes to both.



What would you do if there's no one else with project management experience in your organization to be your peer reviewer?

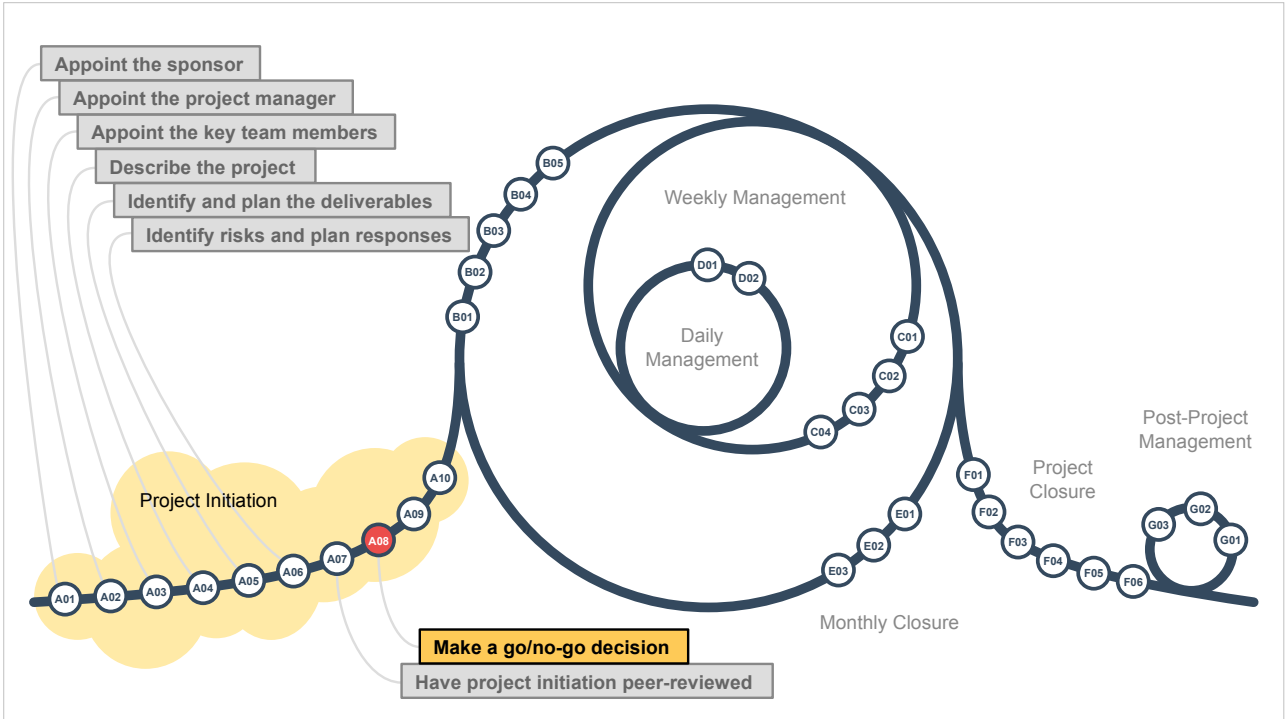


Then they have to get help from an external person. In doing so, they should be careful with the information they share, and discussing it with the Sponsor may be necessary.

For example, if some of your learners don't have (enough) peers with project management experience in their organizations, maybe they can stay in touch and help each other as peer reviewers after the course.

Another good alternative is to ask old colleagues for help. Even if someone doesn't have anyone to ask, they can post their request in an online forum and ask strangers with project management experience to become their peer reviewers. They can return the favor later by peer-reviewing their projects.

Note that it's not a one-way relationship and the person who peer reviews can also learn from the other person. That's a motivation that makes it easier to find external peer reviewers.

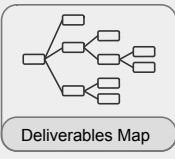


1

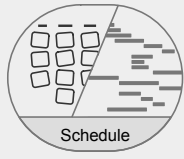


Project Description

2



Deliverables Map



Schedule

3



Follow-Up Register

4



Health Register

So, this is how the project would work. Shall we start the execution?



Project Manager



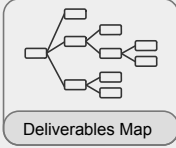
Sponsor

1

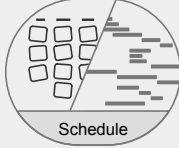


Project Description

2

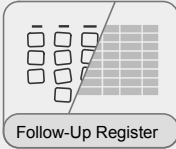


Deliverables Map



Schedule

3



Follow-Up Register

4



Health Register

So, this is how the project would work. Shall we start the execution?

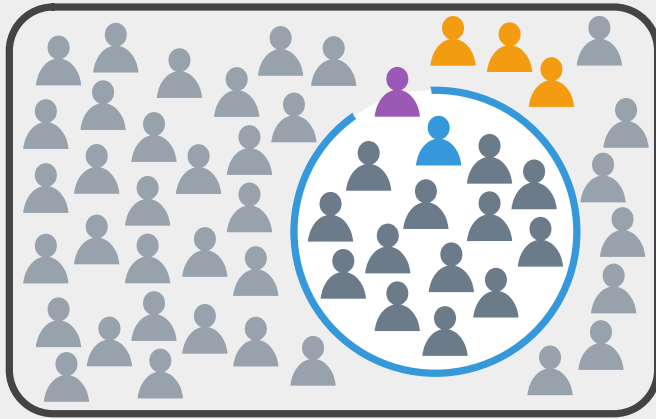


Project Manager

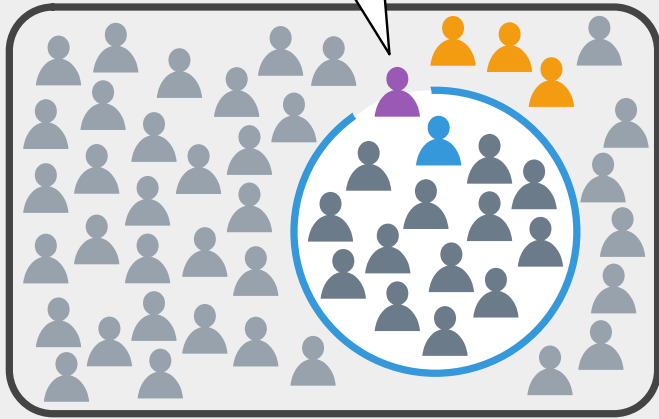
Hmm... let me check with a few people and get back to you.

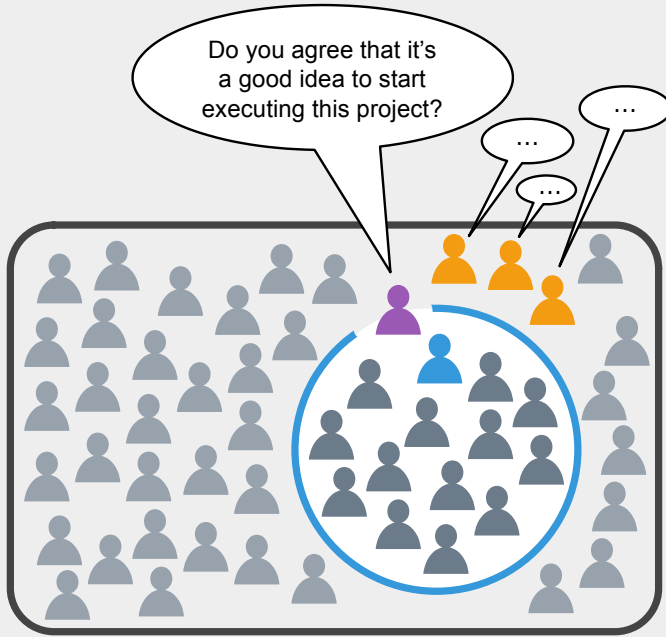


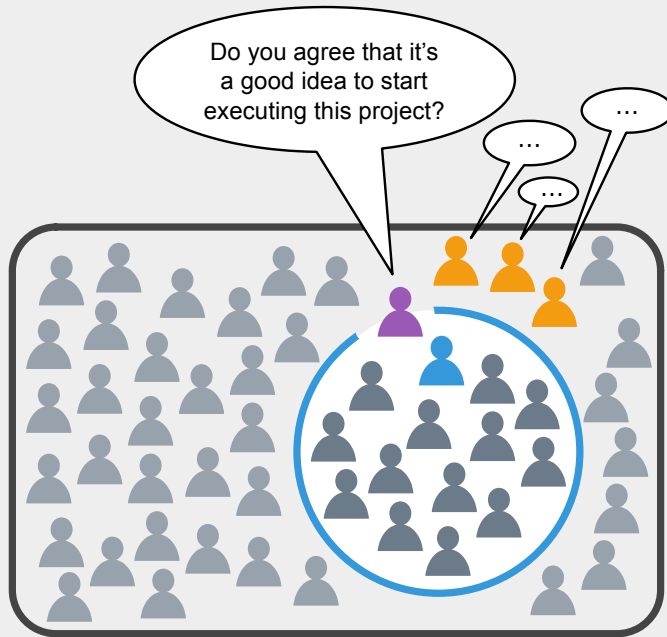
Sponsor



Do you agree that it's a good idea to start executing this project?



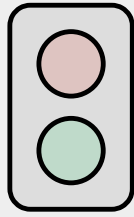




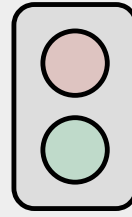
Understanding who needs to be involved in high-level decisions can be complicated.

The **Project manager** shouldn't worry about that, though. They are only in touch with the **sponsor**, and the sponsor is responsible to talk to other decision makers.

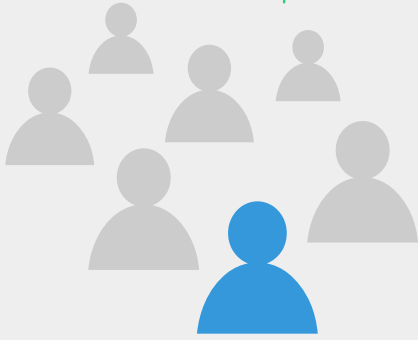
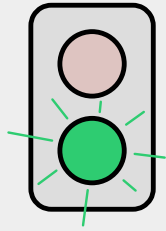
World #63



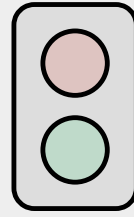
World #64



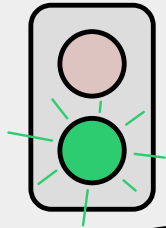
World #63



World #64



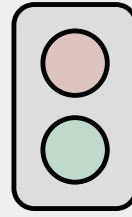
World #63



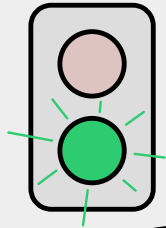
OK... let's
move on to the
next activity!



World #64



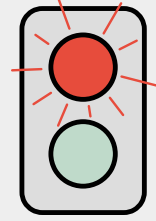
World #63

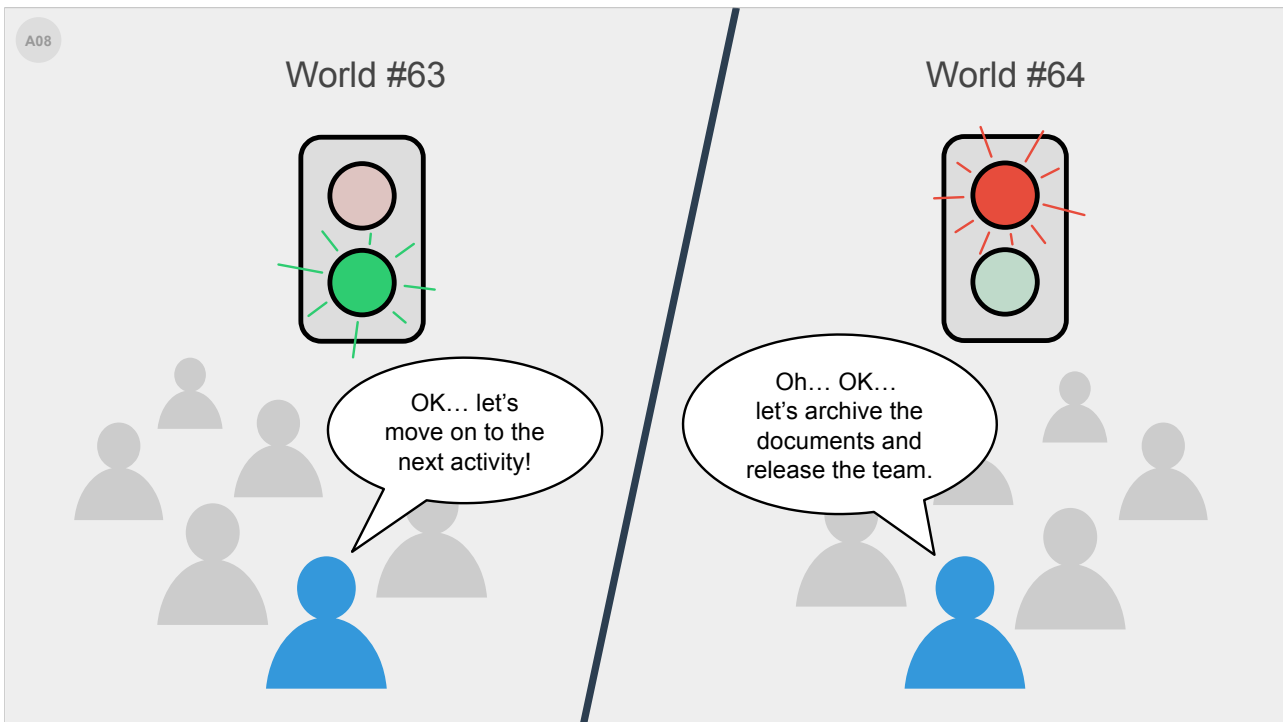


OK... let's
move on to the
next activity!



World #64

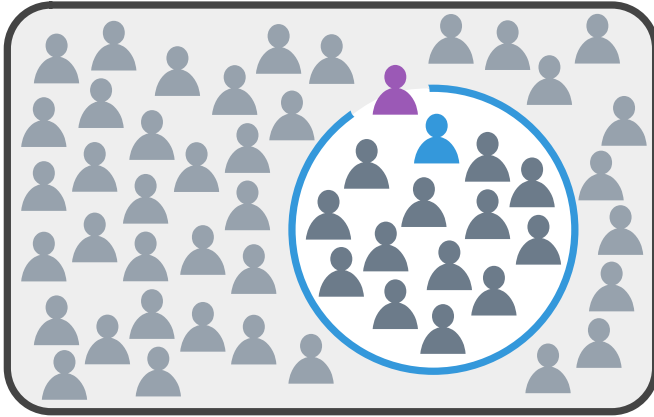
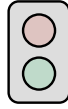




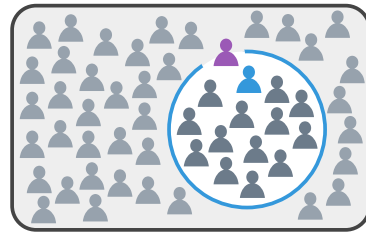
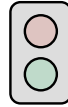
We don't run the Project Closure activity group when the first go/no-go decision is negative because the execution of the project is not started yet. We will only archive the documents and go away.

If the project is canceled after this first go/no-go decision, then we go through the Project Closure activities.

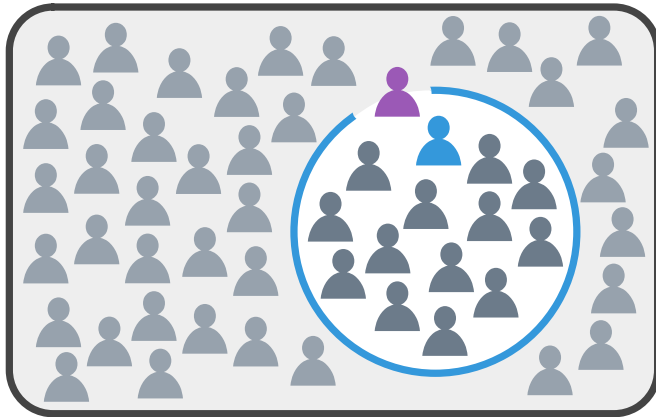
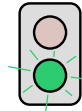
Your organization



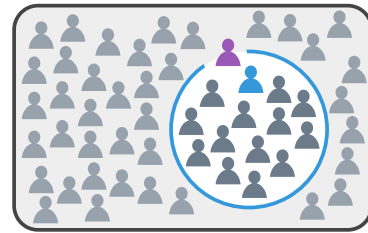
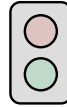
Customer (if any)



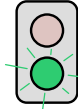
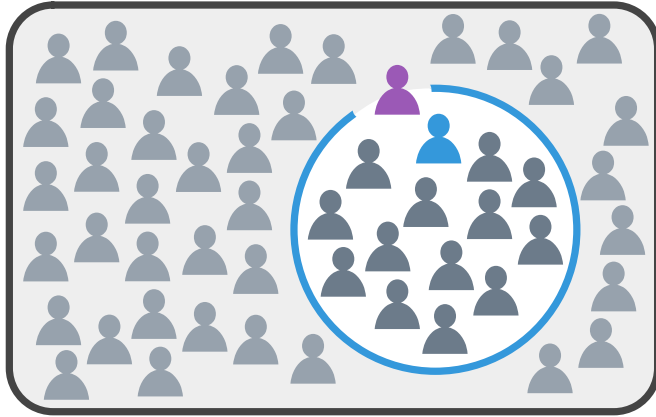
Your organization



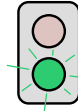
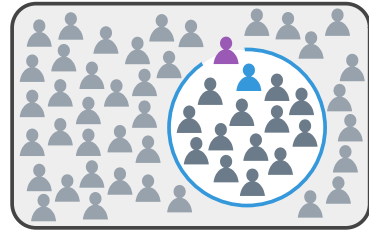
Customer (if any)

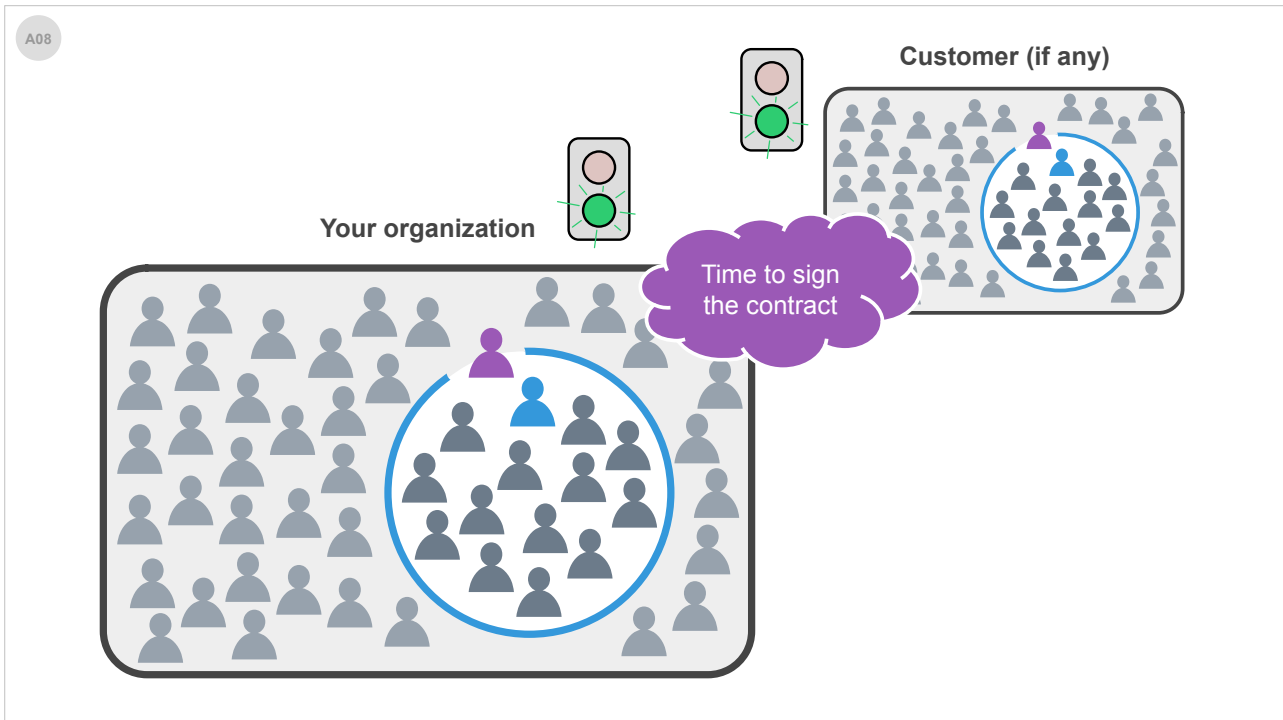


Your organization



Customer (if any)





You may need to pause and spend more time here for some types of audience: In some organizations, people are involved in the project only after the contract is signed. It doesn't mean there was no Project Initiation but that a different team did it. As discussed in the first section, this should not be the case, and the same people who will execute the project should initiate it (along with other experts that should be involved in the contractual, legal, and other aspects).

Note: We can't change the results without changing how we work. P3.express is designed to be as compatible as possible with the organic way of working and, therefore, minimizes the amount of change, but it still requires some changes. If someone thinks they can't change anything, they simply can't implement any structured project management system, and they won't get improved results from their projects.

That being said, a partial implementation can still benefit people who are under strict constraints; e.g., they may not be able to have proper Project Initiations, but it's still helpful to implement the rest.

A08

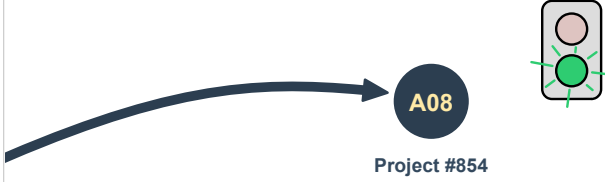


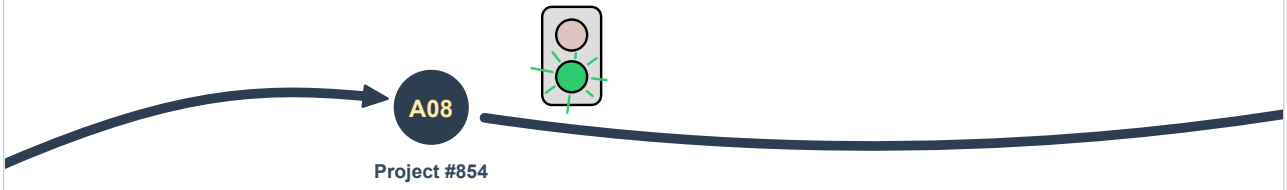
A08

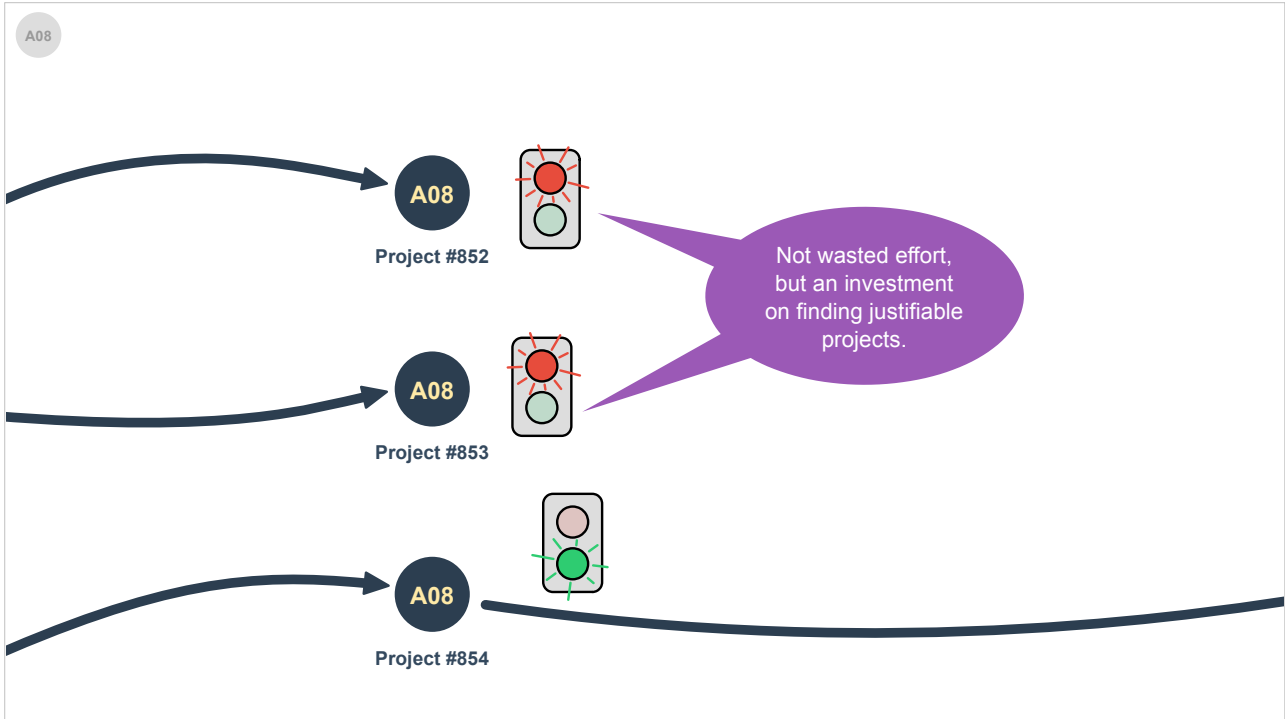


A08

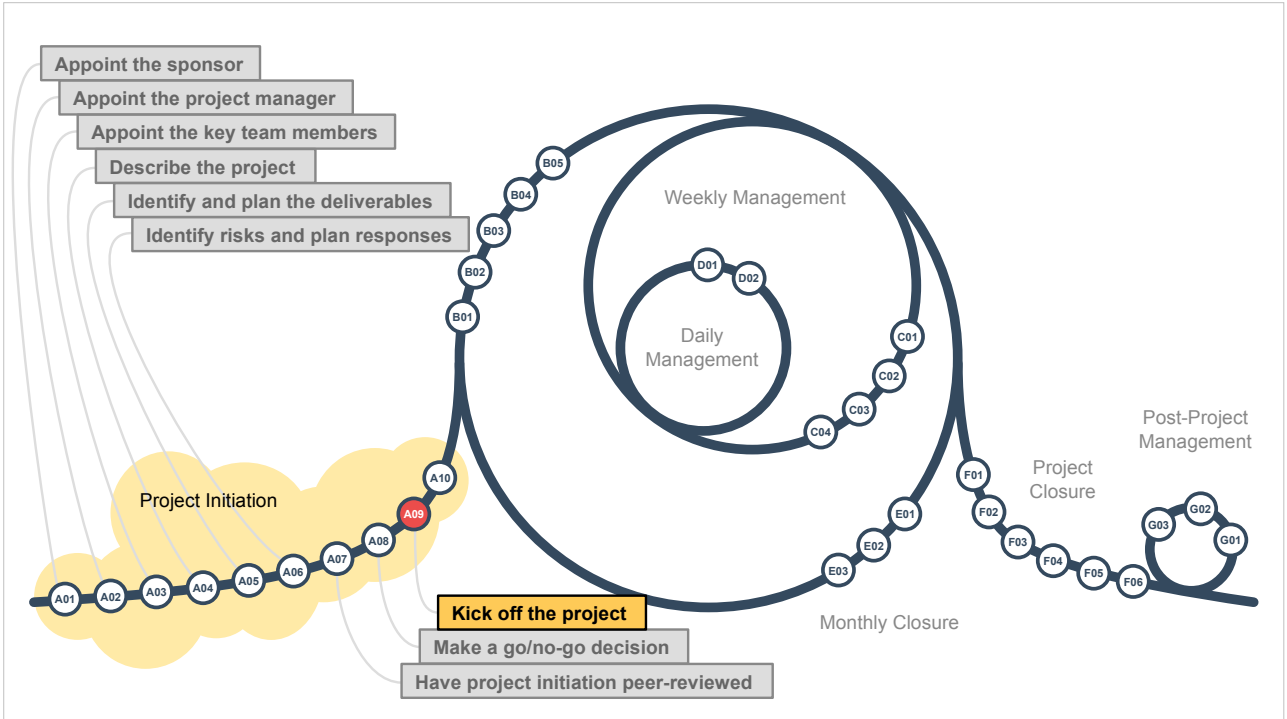


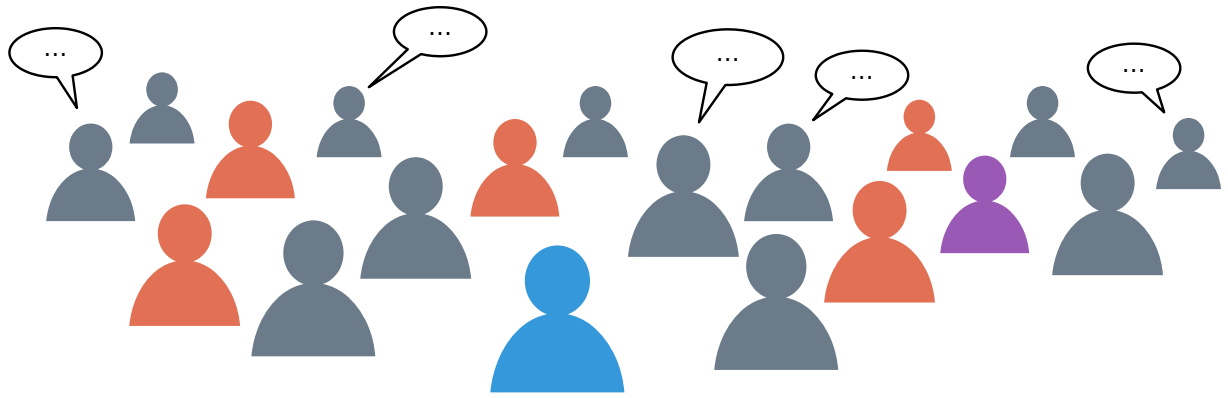


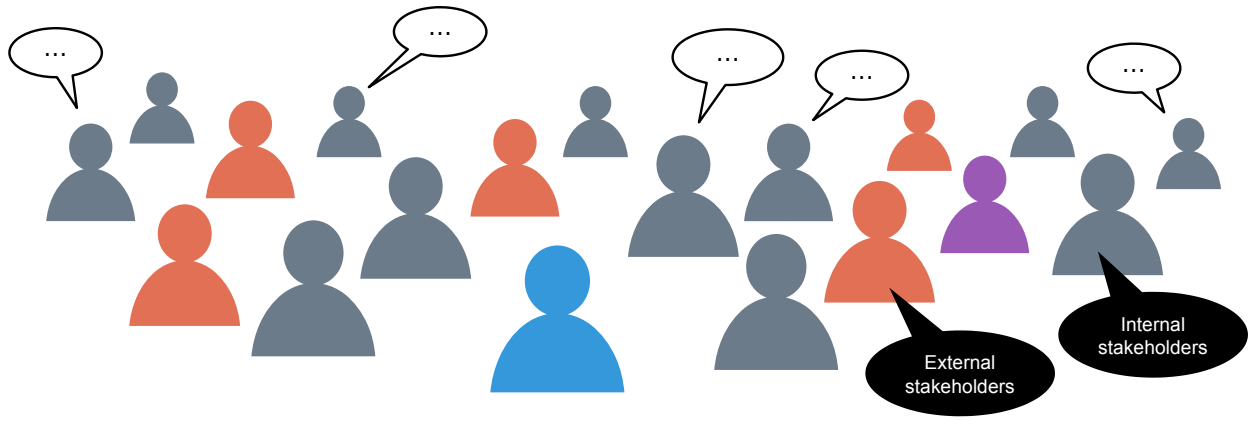




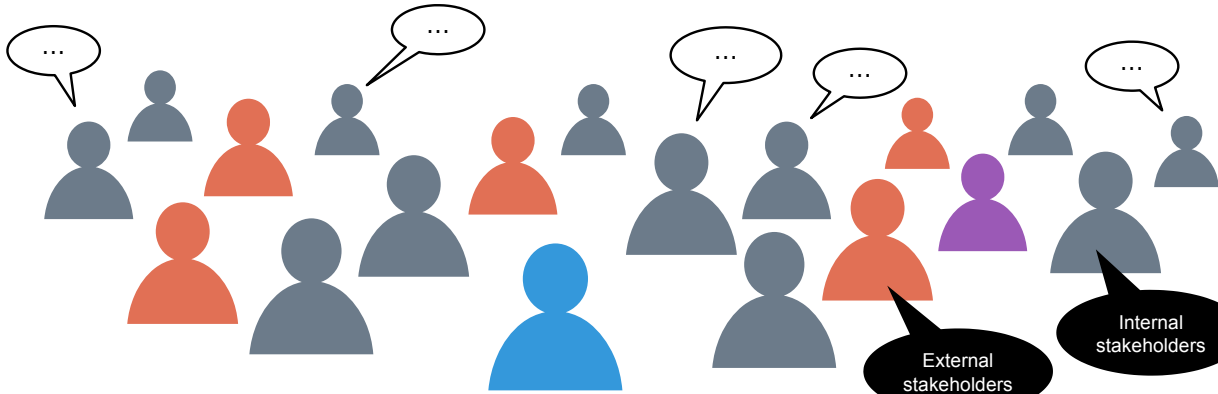
This is important because if those efforts are seen as waste, then project initiations may not be taken seriously enough, and fewer resources would be allocated to them, which in turn, results in undertaking undesirable projects or rejecting desirable ones.

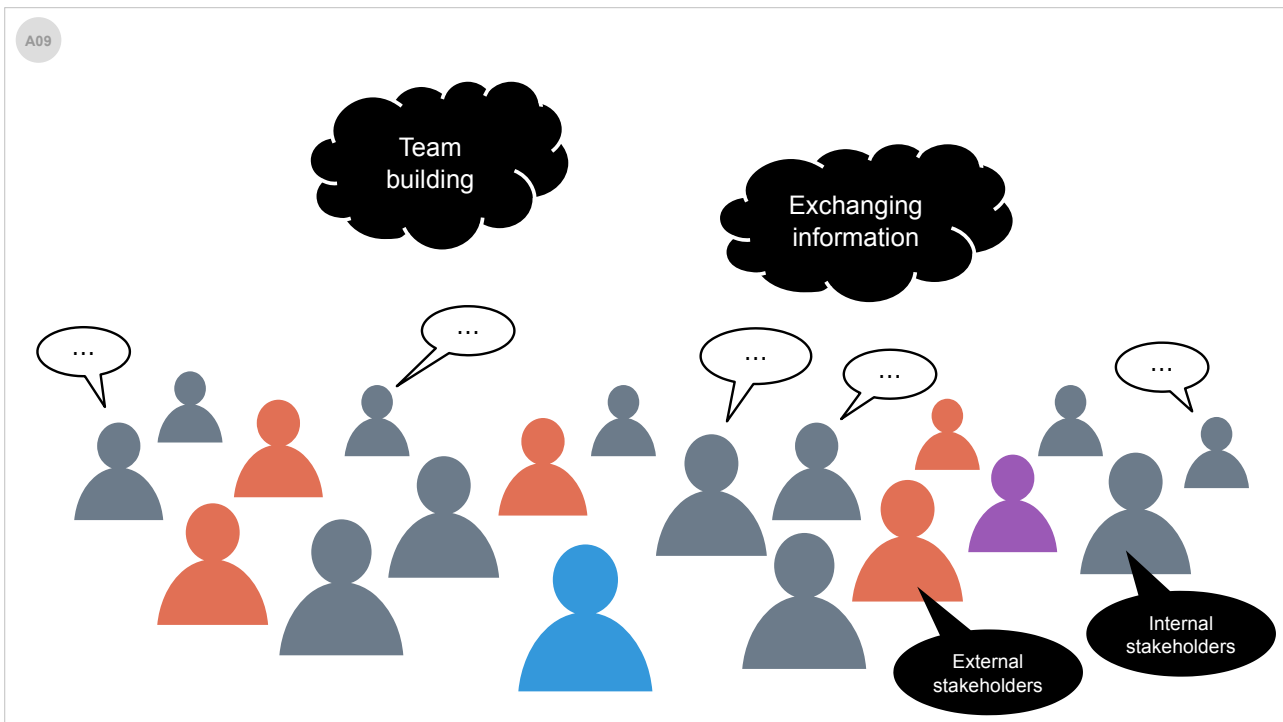




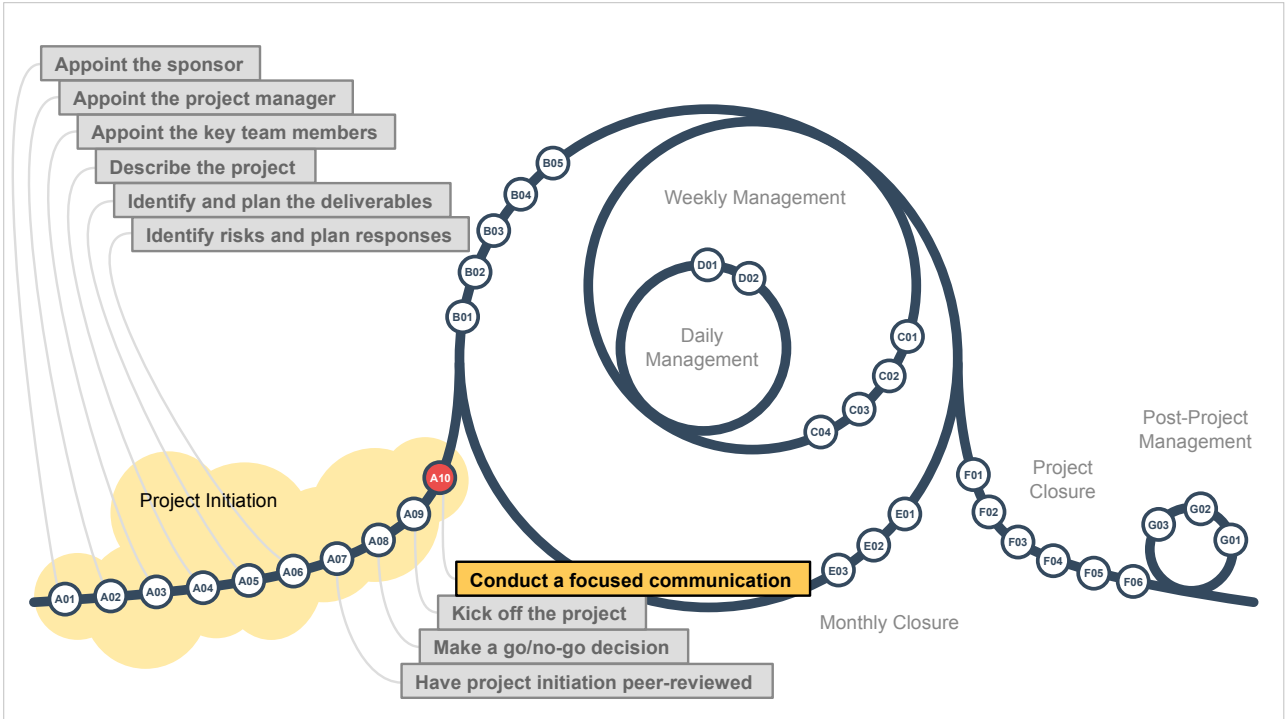


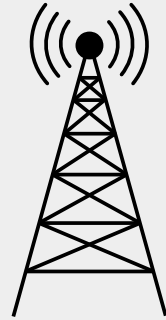
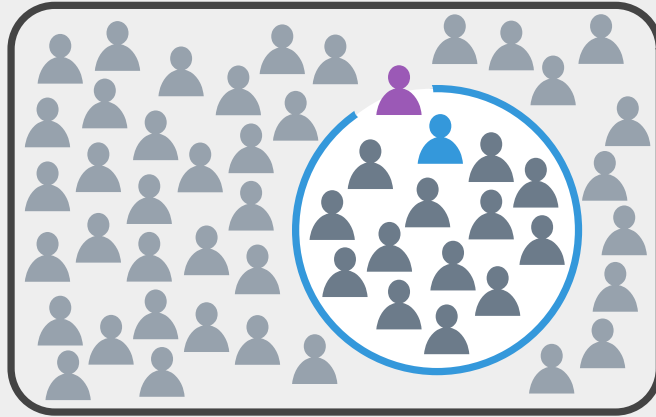
Team building

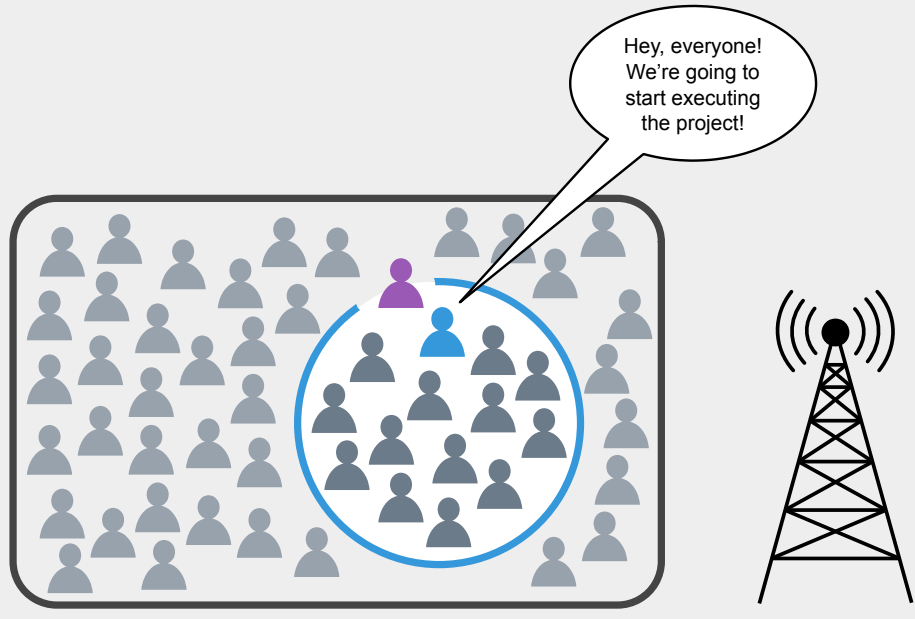




The project manager should facilitate this event and ensure that it's pleasant and satisfies its purpose.

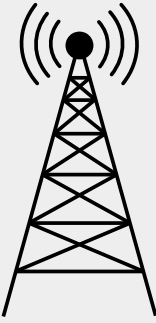
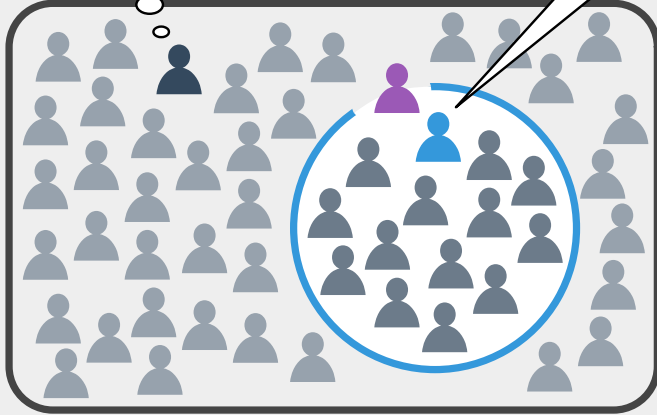


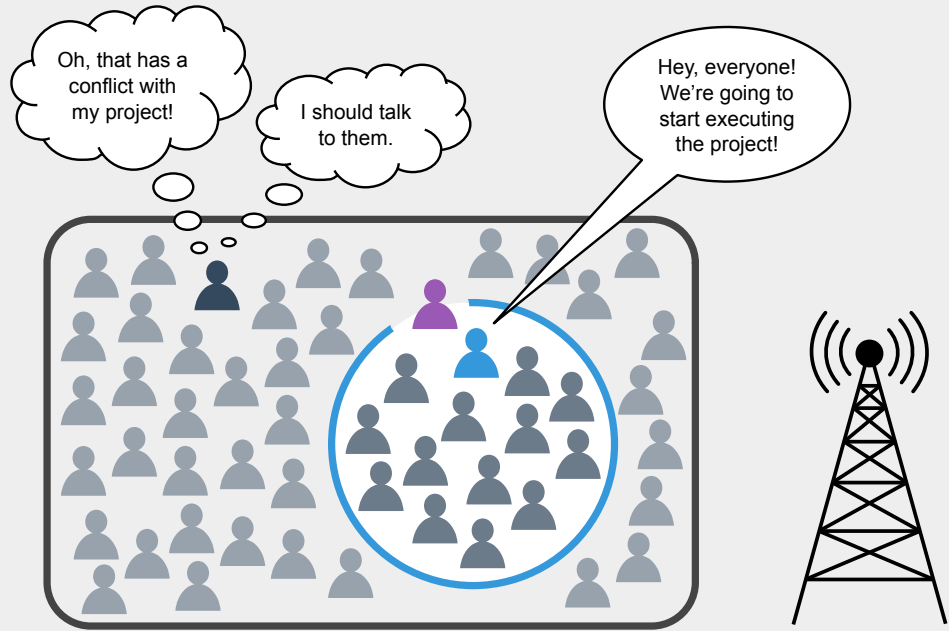


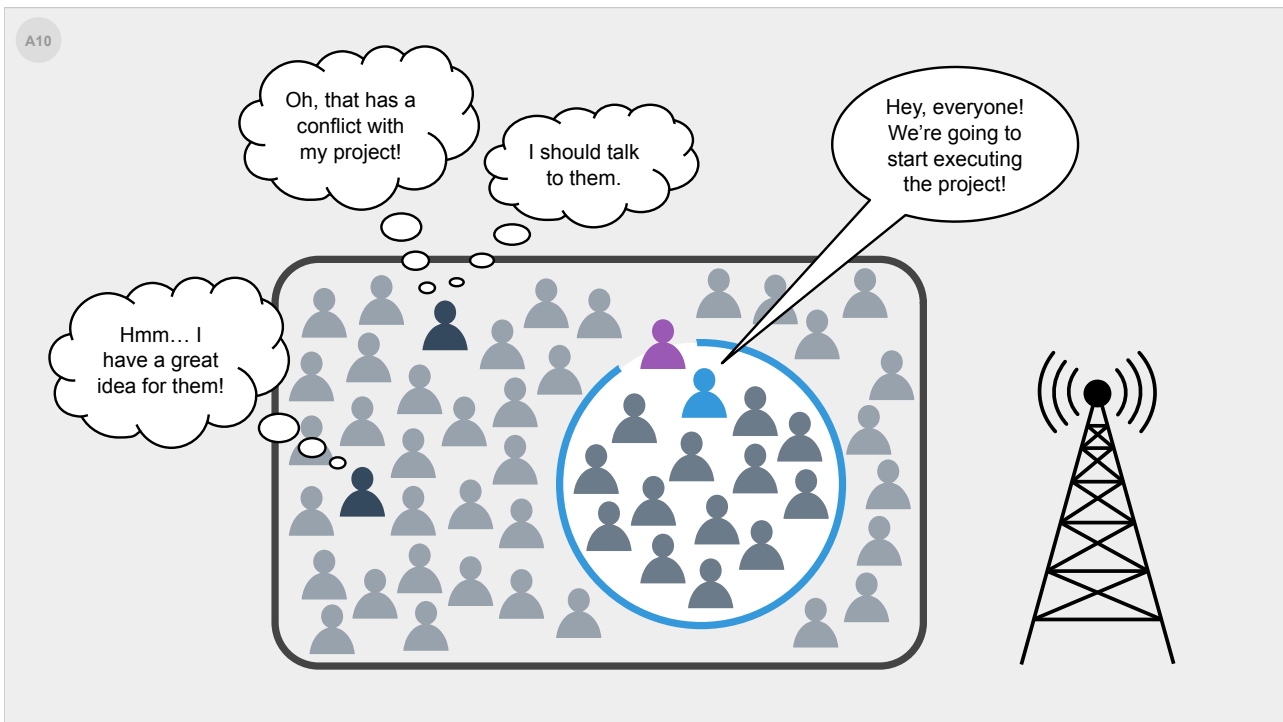


Oh, that has a conflict with my project!

Hey, everyone! We're going to start executing the project!

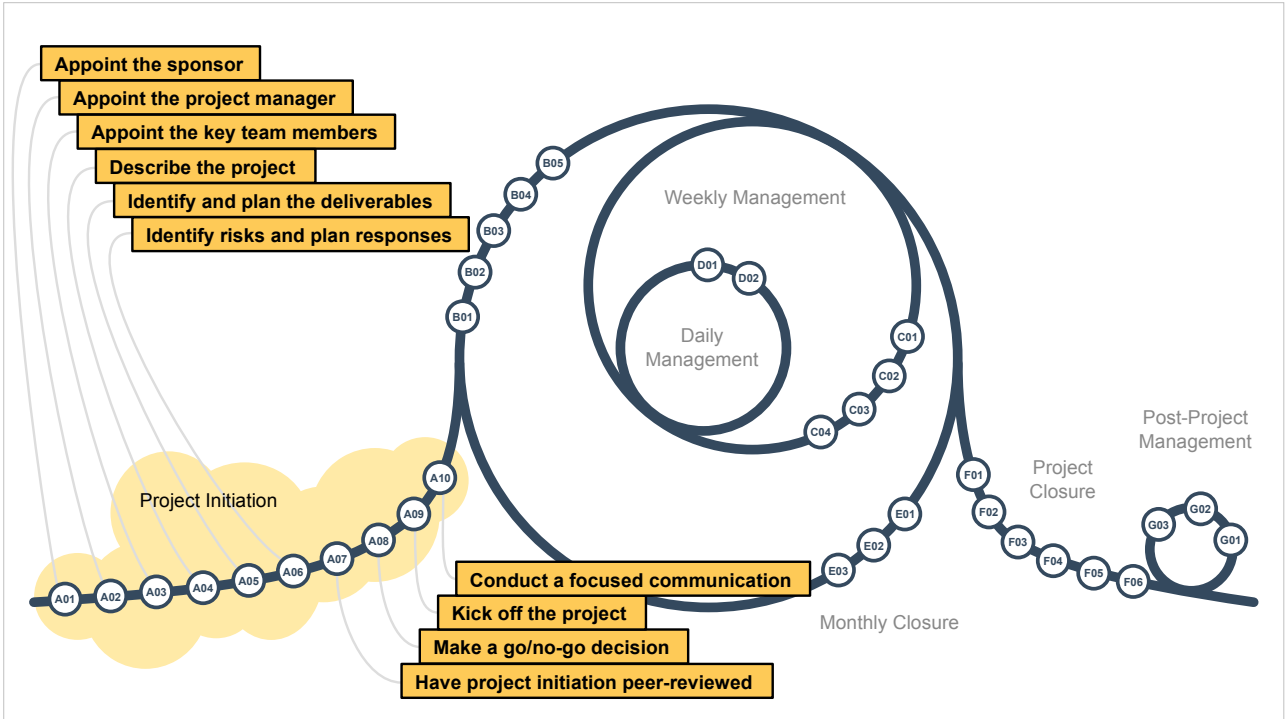




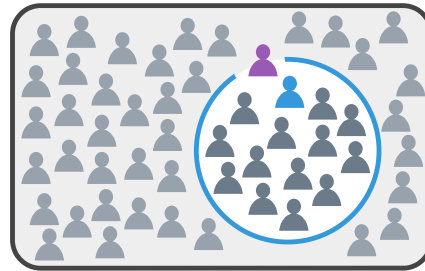


This makes sense for many of your learners: Someone starts a project in the organization without others knowing about it and ends up causing problems for others because of the unaddressed conflicts.

We can identify various threats and opportunities by letting everyone in the organization know that we're going to start the project.

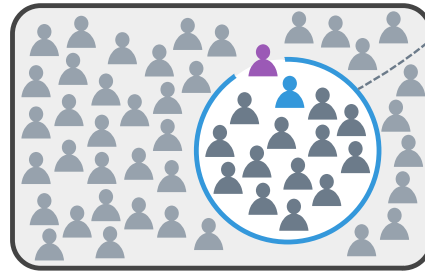


Your organization



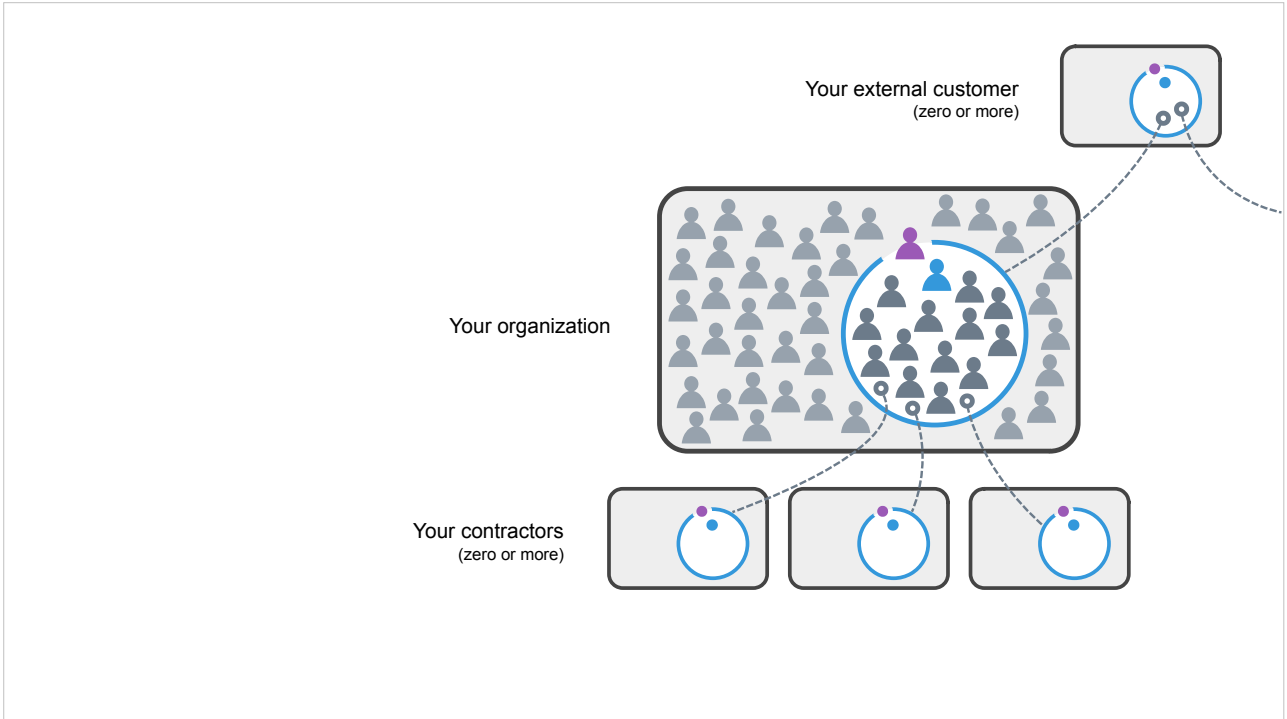
At this point, we're done reviewing Project Initiation. Before reviewing the next activity group, we must discuss an important concept: Perspectives!

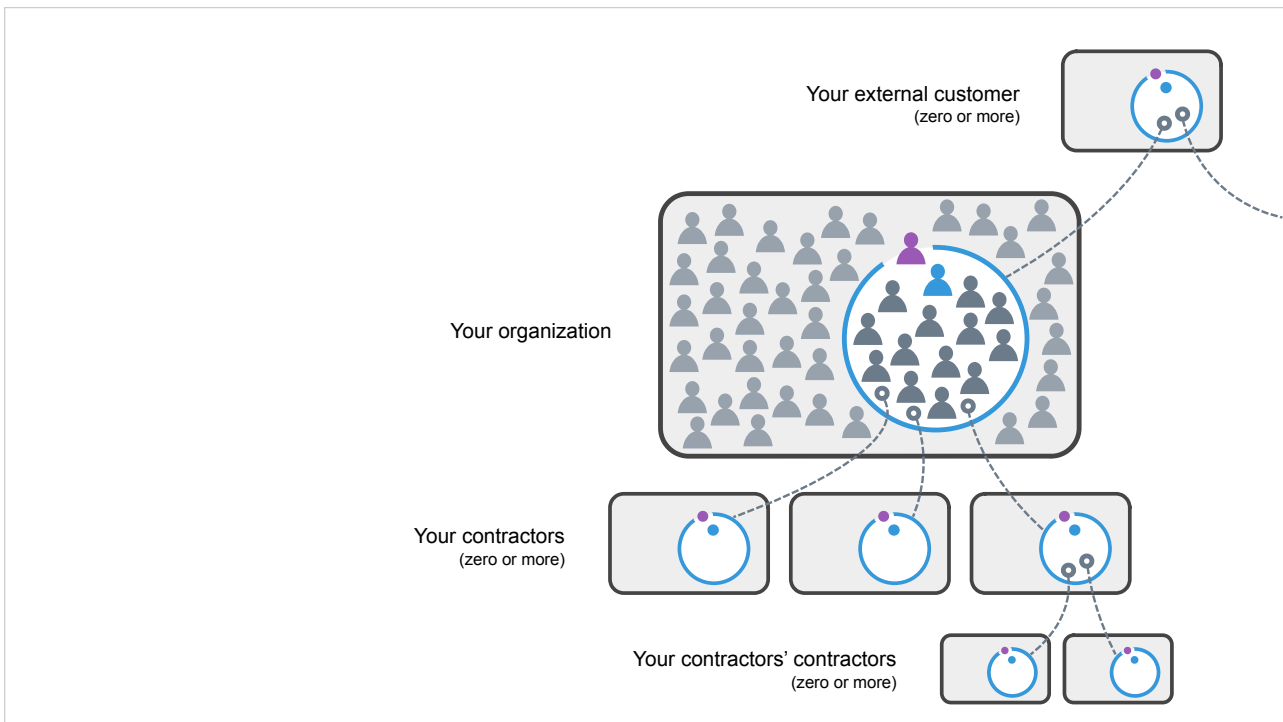
Your organization



Your external customer
(zero or more)







Note:

- Internal teams have team leaders
- External teams have supplier project managers

Team leaders and supplier project managers coordinate with your project manager. The person you call “project manager”, would be considered “supplier project manager” by your customer.

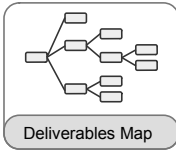
So, the labels we give people are not universal, but depend on our perspective.

1



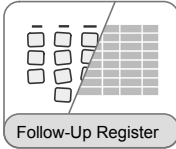
Project Description

2



Deliverables Map

3

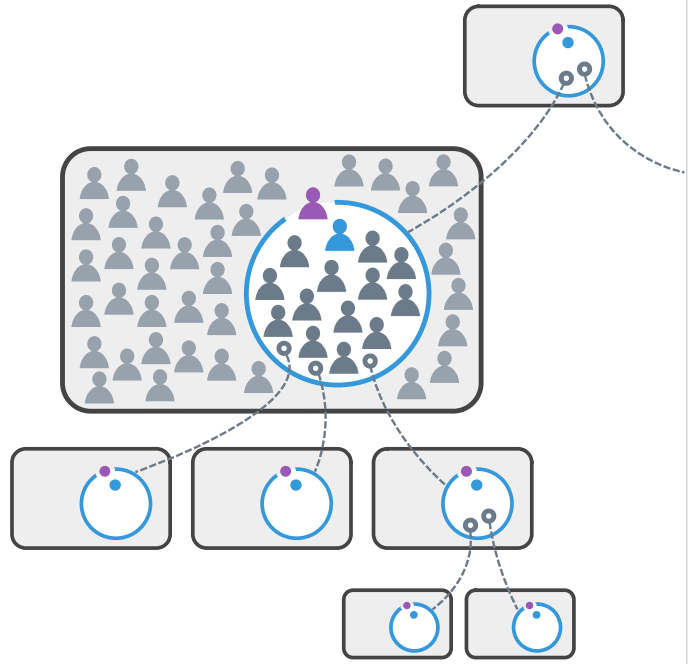


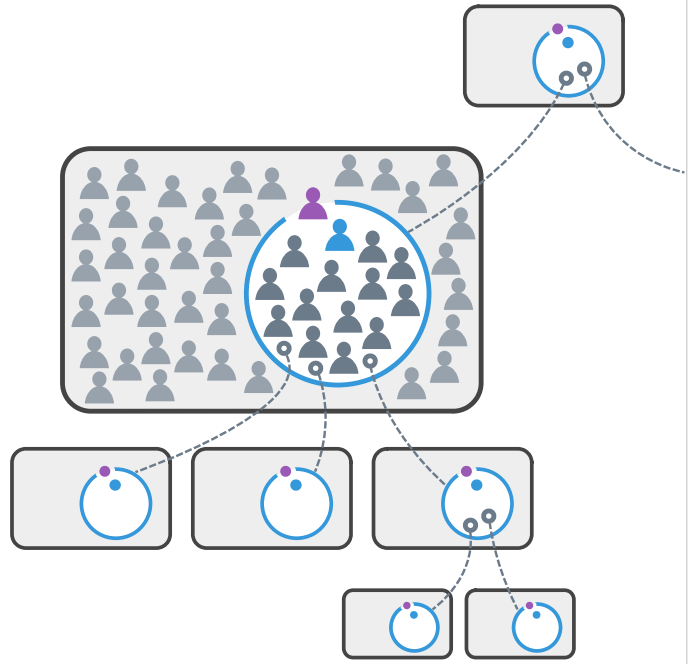
Follow-Up Register

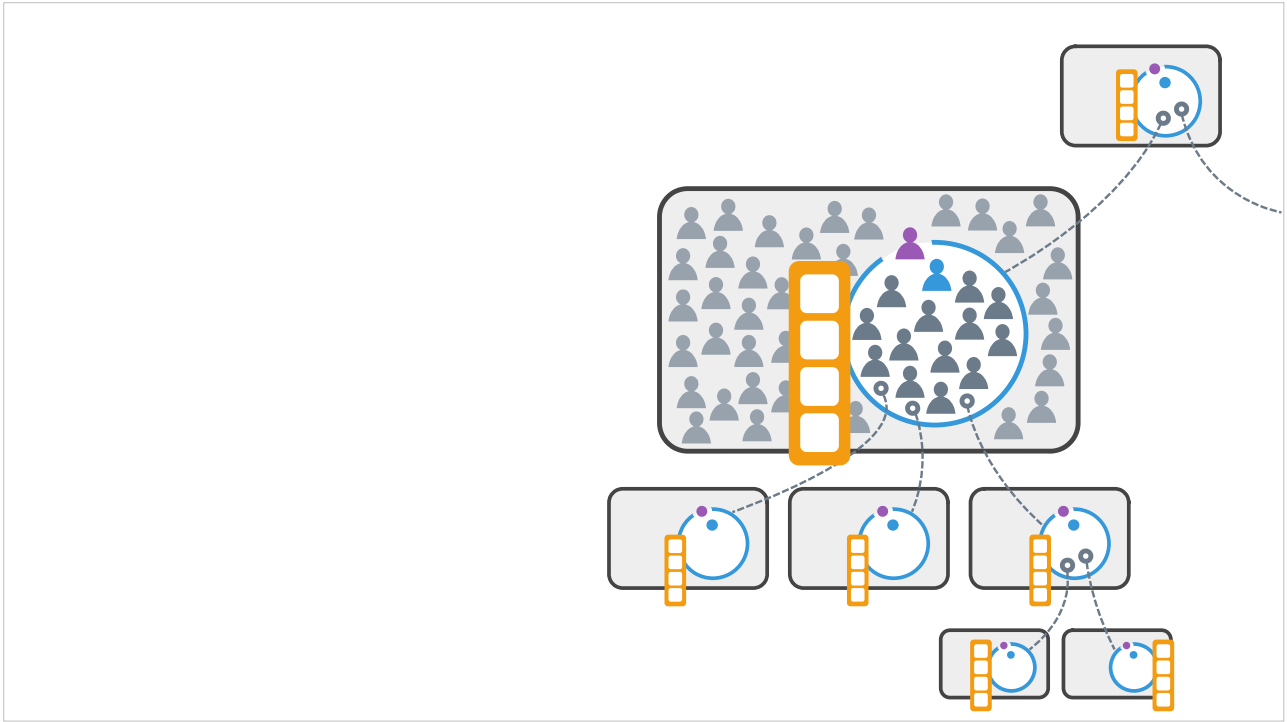
4

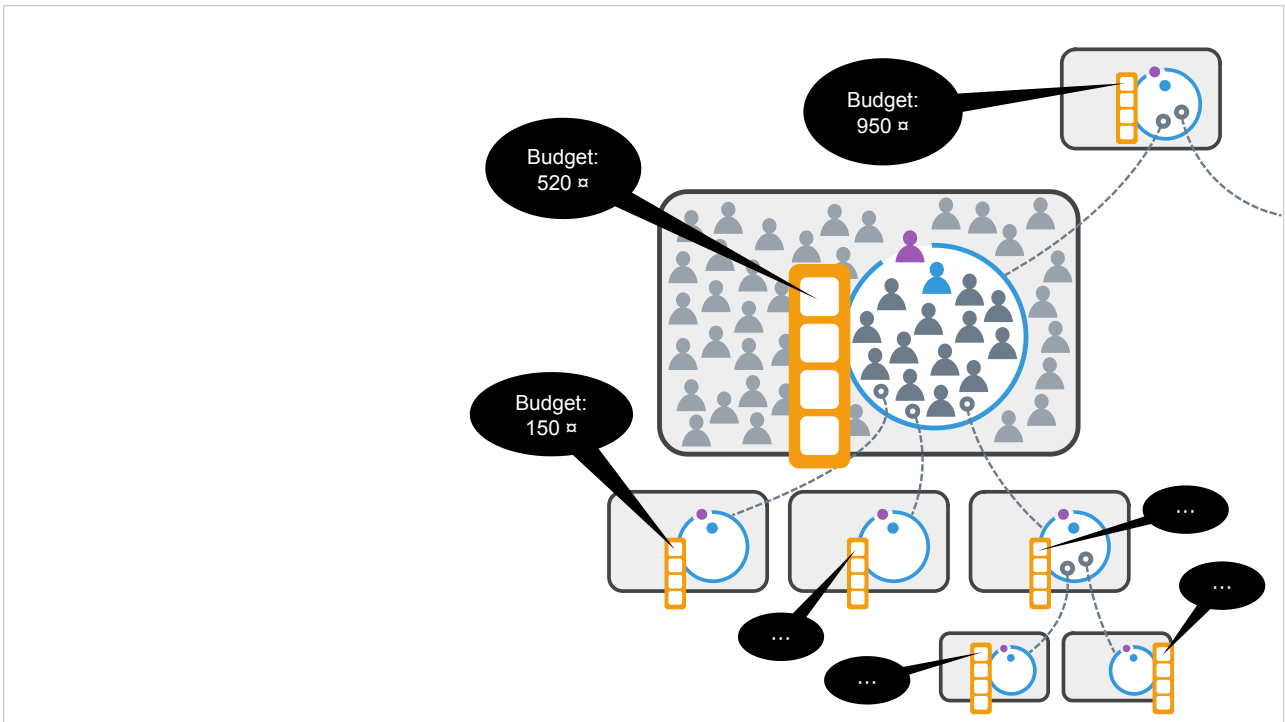


Health Register





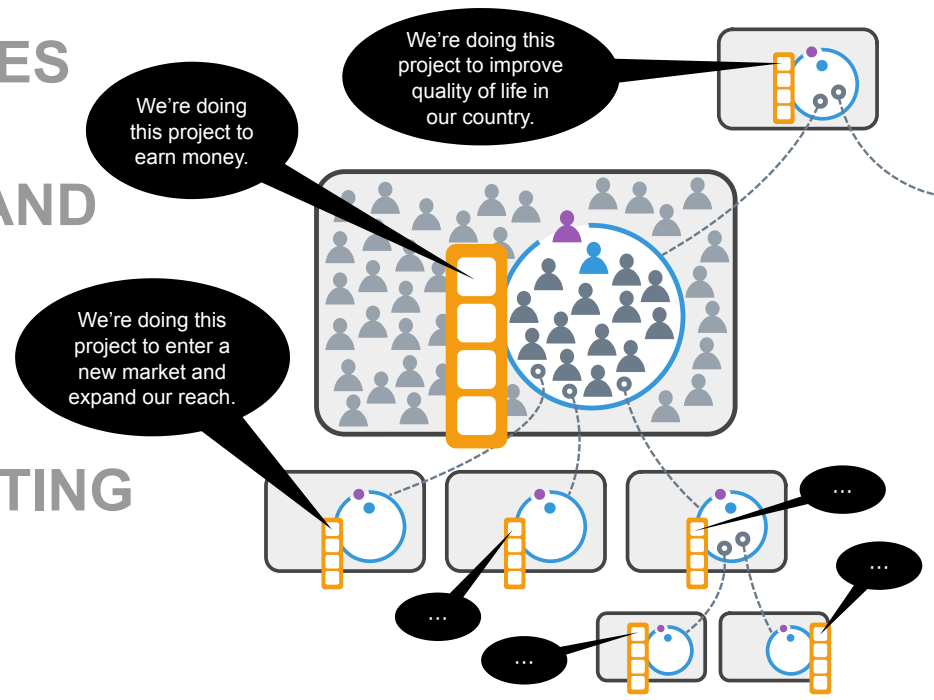




P3.express doesn't provide a single structure to combine all parties in it. Instead, each party has its own structure and connects to the others.

One aspect of this multi-perspective system is that each party has its own documents, which reflect the information related to their perspective. So, a simple example is that we mention the budget in Project Description, and each party has its own budget written there.

**ALL PARTIES
MUST
UNDERSTAND
OTHERS'
REASONS
FOR
PARTICIPATING
IN THE
PROJECT.**



Continuing from the previous example (which was very simple and relatively obvious), we should have the same about other aspects such as the purpose of the project: Each party writes down their own purpose in the Project Description.

However, for certain information, such as purpose, we need to know others' purposes as well. For example, if you know that one of your suppliers' main purpose is to enter a new market, you may want to facilitate it because their success helps the whole project.

So, you'd write down your own purpose (and benefits) and then mention other parties' if needed.

① High-level overview

② Full review

- Ⓐ Project Initiation
- Ⓑ Monthly Initiation
- Ⓒ Weekly Management
- Ⓓ Daily Management
- Ⓔ Monthly Closure
- Ⓕ Project Closure
- Ⓖ Post-Project Management

③ NUPP

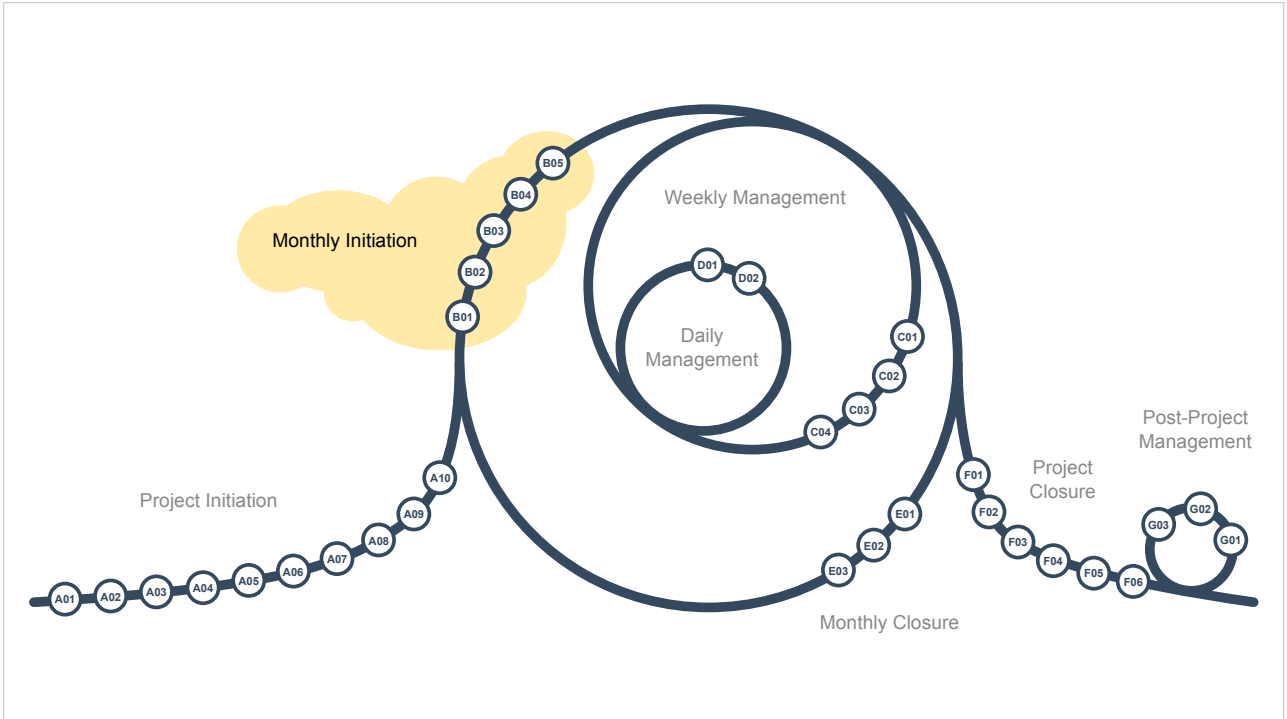
④ Tailoring

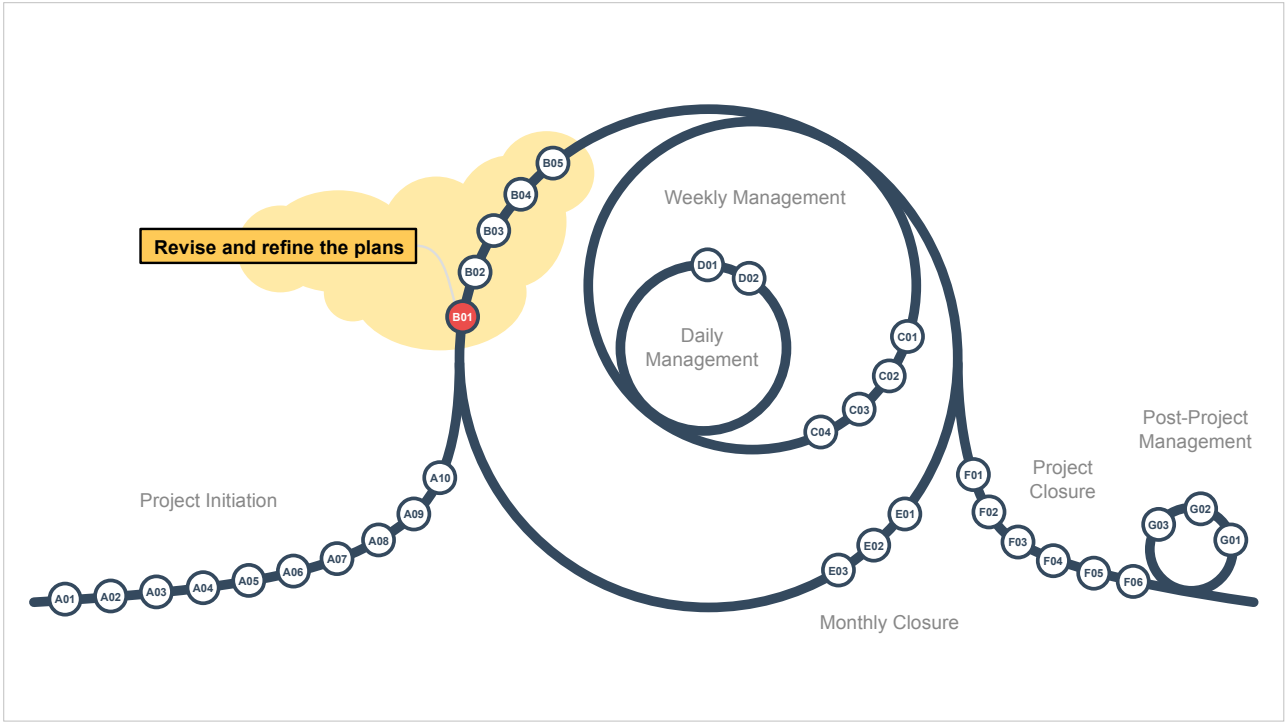
⑤ Development methods

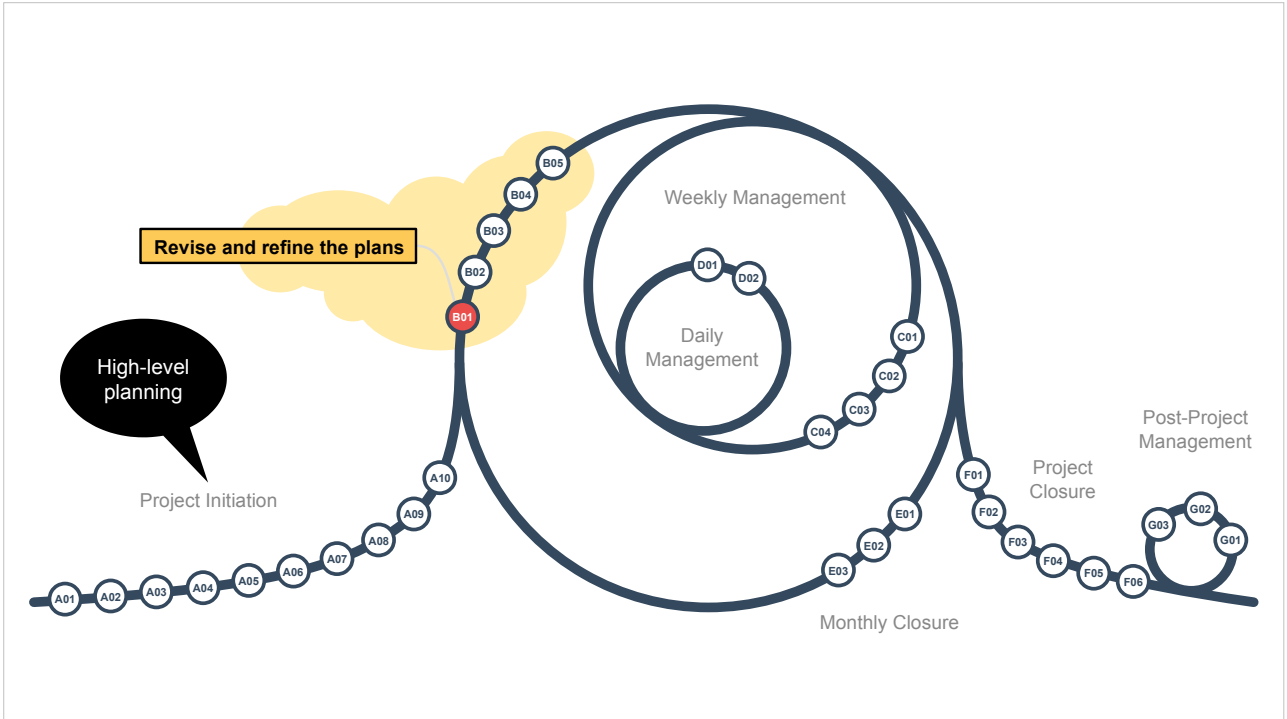
⑥ Code of conduct

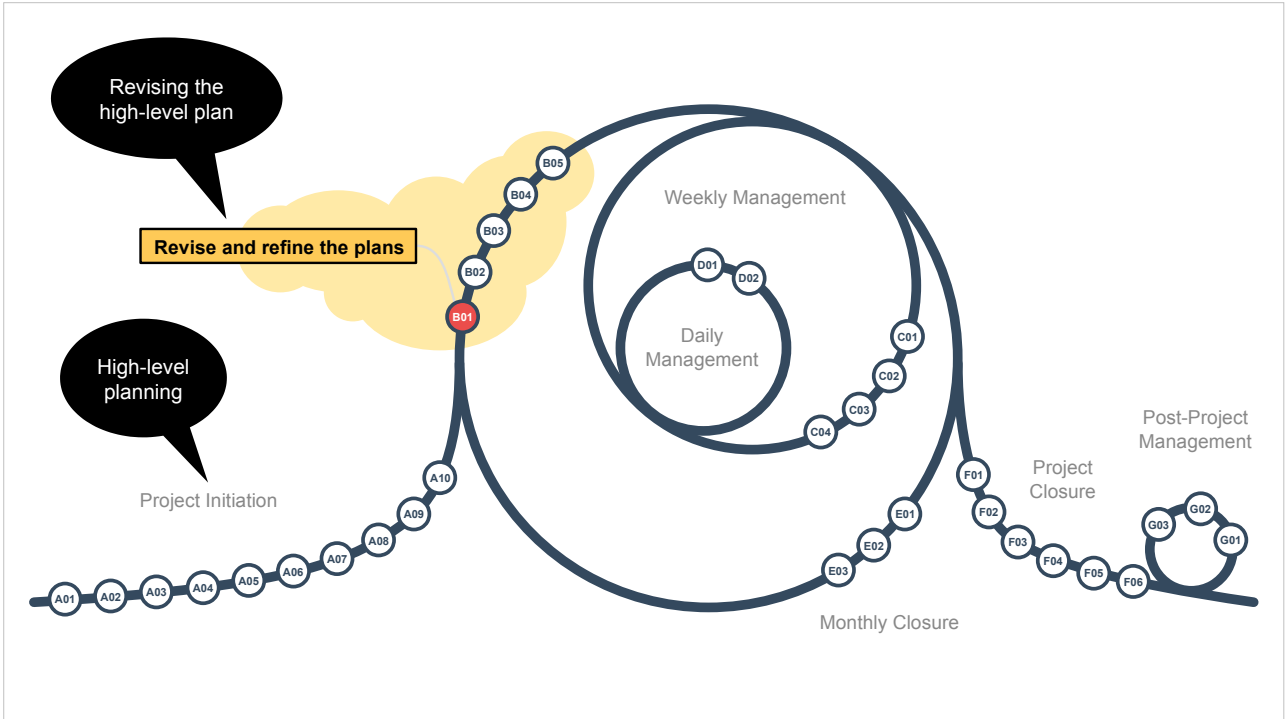
⑦ Certification program

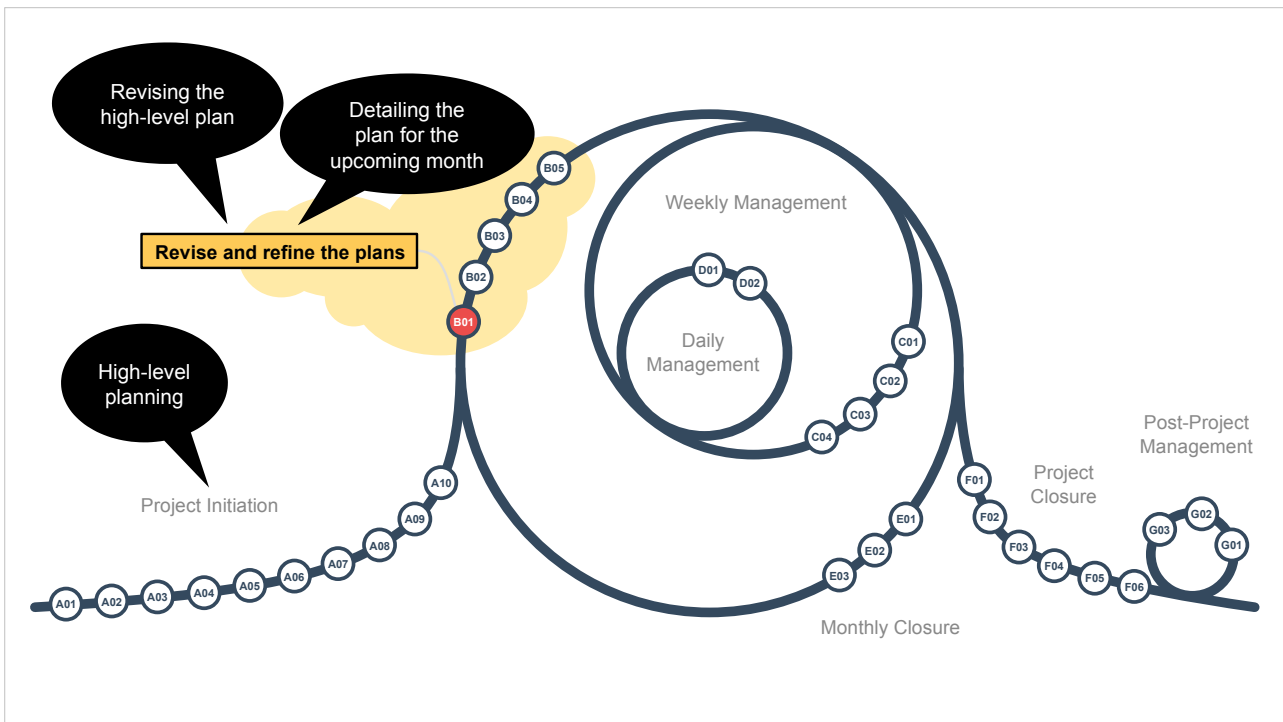








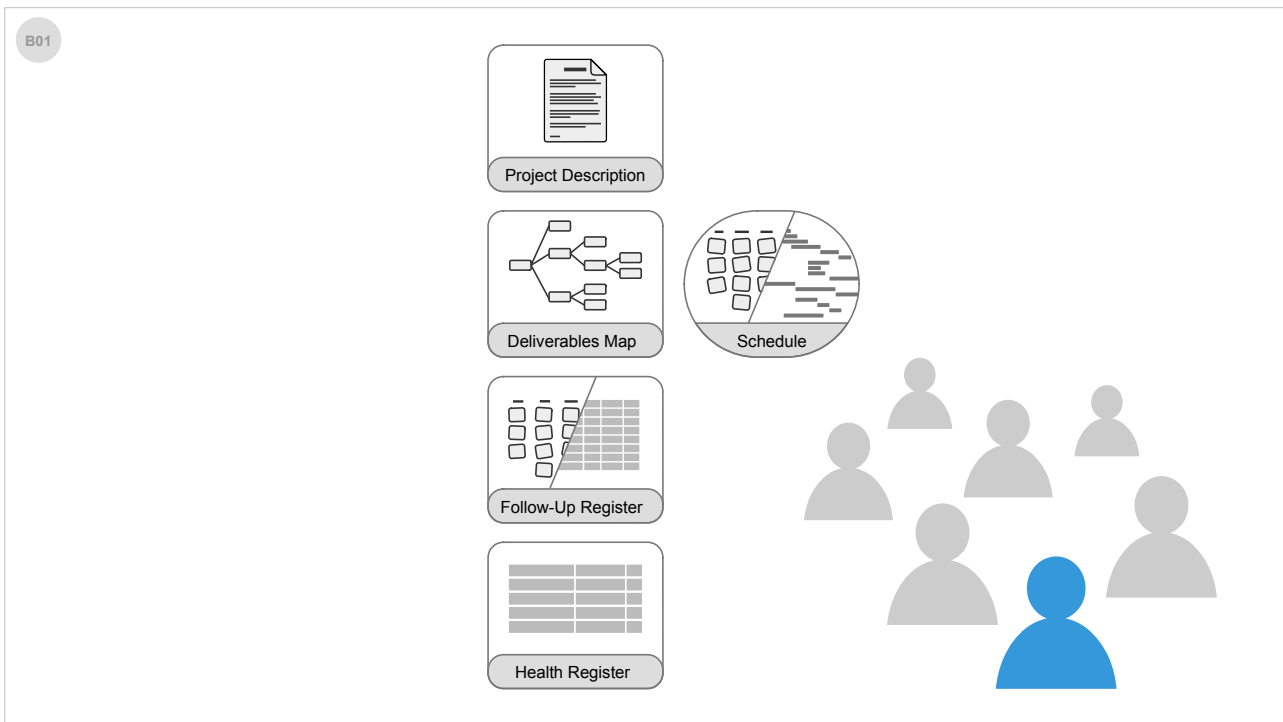




Reminder: By default, we want to have a high-level plan in Project Initiation and detail it in Monthly Initiation, unless, for some reason, we must have a detailed plan upfront.

There are two planning goals in Monthly Initiation:

- Revise the high-level plan: always necessary, even when the upfront plan is detailed. Note: We do make gradual changes to the plan during the C02 and even D01 activities, but B01 is where we double-check everything and do it from a more high-level, holistic perspective.
- Detail the high-level plan for the upcoming month: This is needed when the upfront plan is high-level.




When we talk about planning, it's not limited to the schedule and includes the Deliverables Map, Follow-Up Register, and even Project Description.

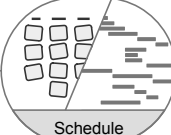
Any new or adjusted requirements?



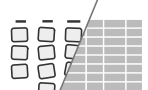
Project Description



Deliverables Map



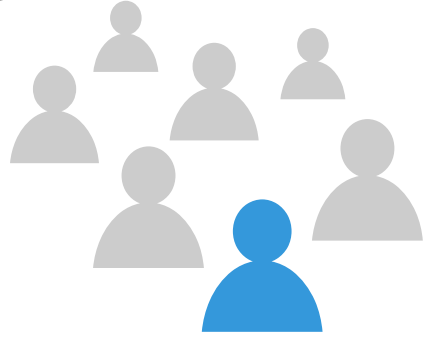
Schedule



Follow-Up Register



Health Register



B01

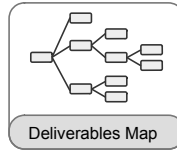
Any new or adjusted requirements?

Any new stakeholders?

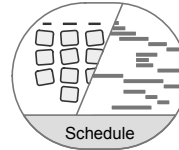
...



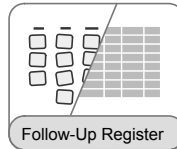
Project Description



Deliverables Map



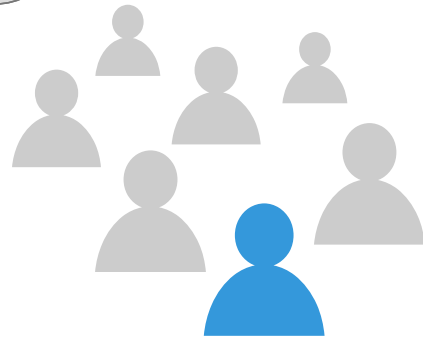
Schedule



Follow-Up Register



Health Register




Reminder: We may add or edit requirements, stakeholders, and other information in the Project Description at any time, but this activity is when we stop and actively check to see whether any changes are required.


Add new deliverables if needed.



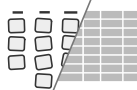
Project Description



Deliverables Map



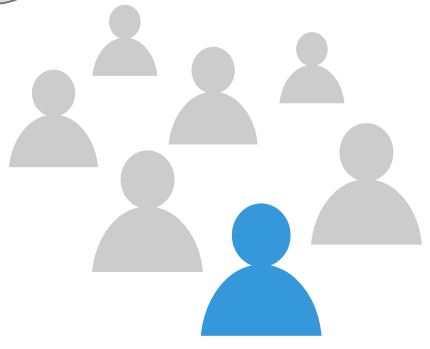
Schedule



Follow-Up Register

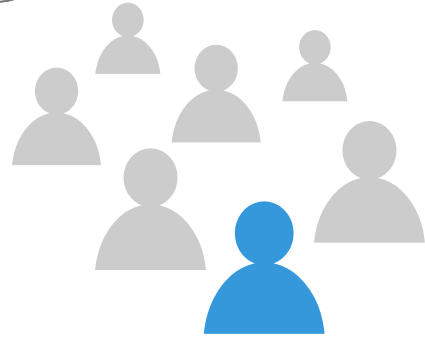
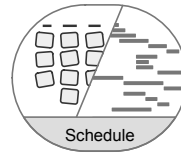
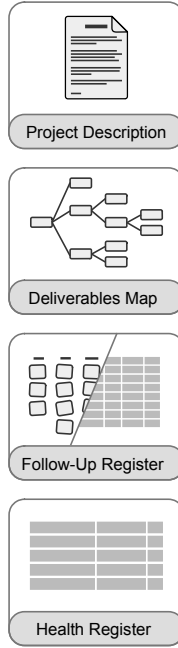


Health Register

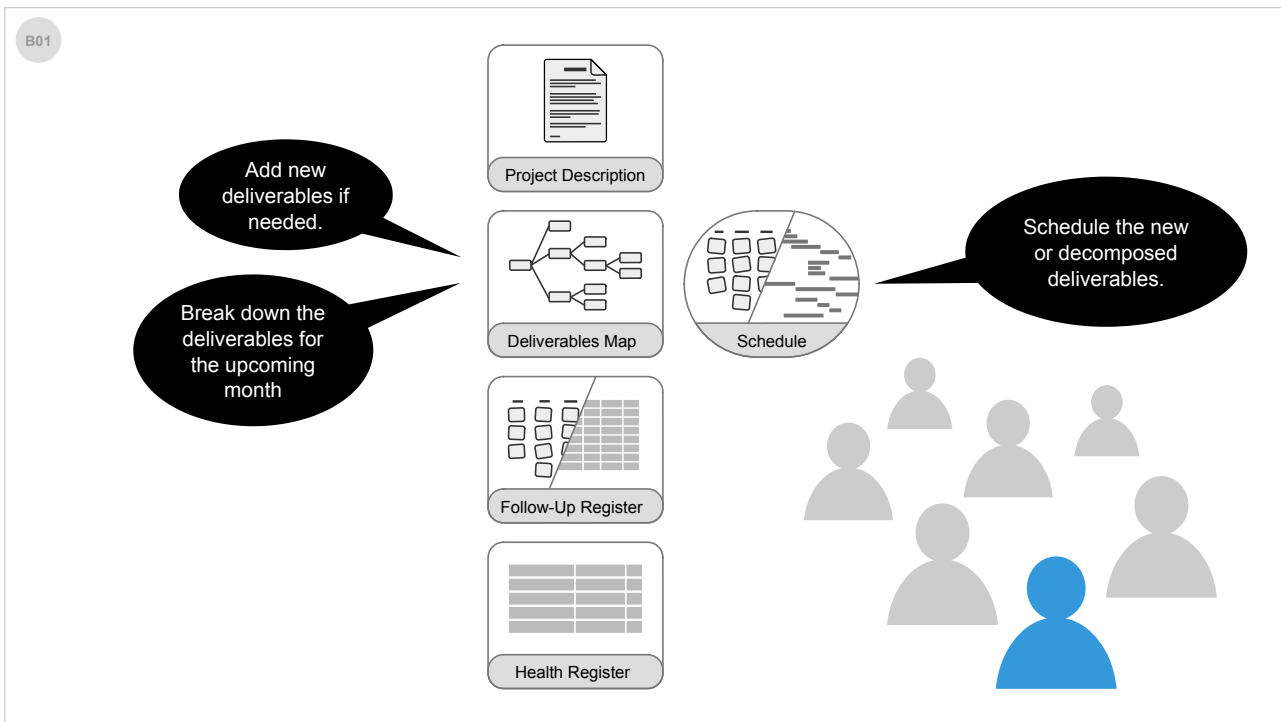


Add new deliverables if needed.

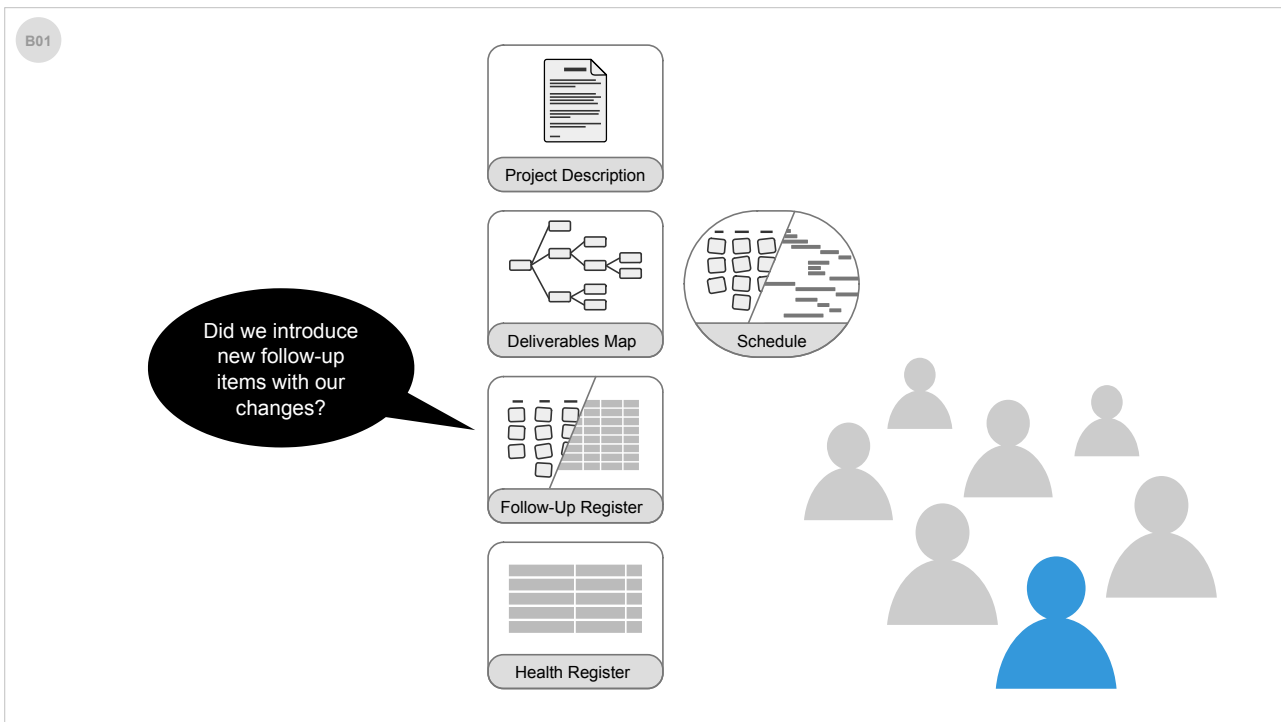
Break down the deliverables for the upcoming month



Breaking down larger deliverables into smaller ones is a key element in detailing the high-level upfront plan.



Changes to the Deliverables Map will be reflected in the schedule, but changes to the schedule are not limited to that; e.g., we may decide to change the order of some of the deliverables to improve performance, quality, etc.

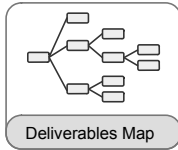


The changes we've made to the previous artifacts can introduce new follow-up items. In addition to that, while we look for new follow-up items daily (D01), this is still an opportunity to gather more people and try to find more follow-up items (e.g., risks) that may have been missed.

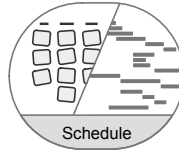
Check archives of old projects for inspiration.



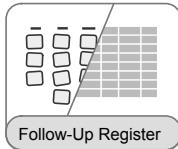
Project Description



Deliverables Map



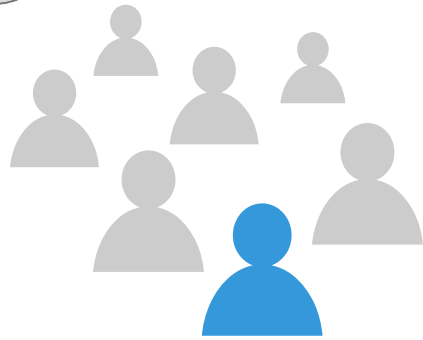
Schedule

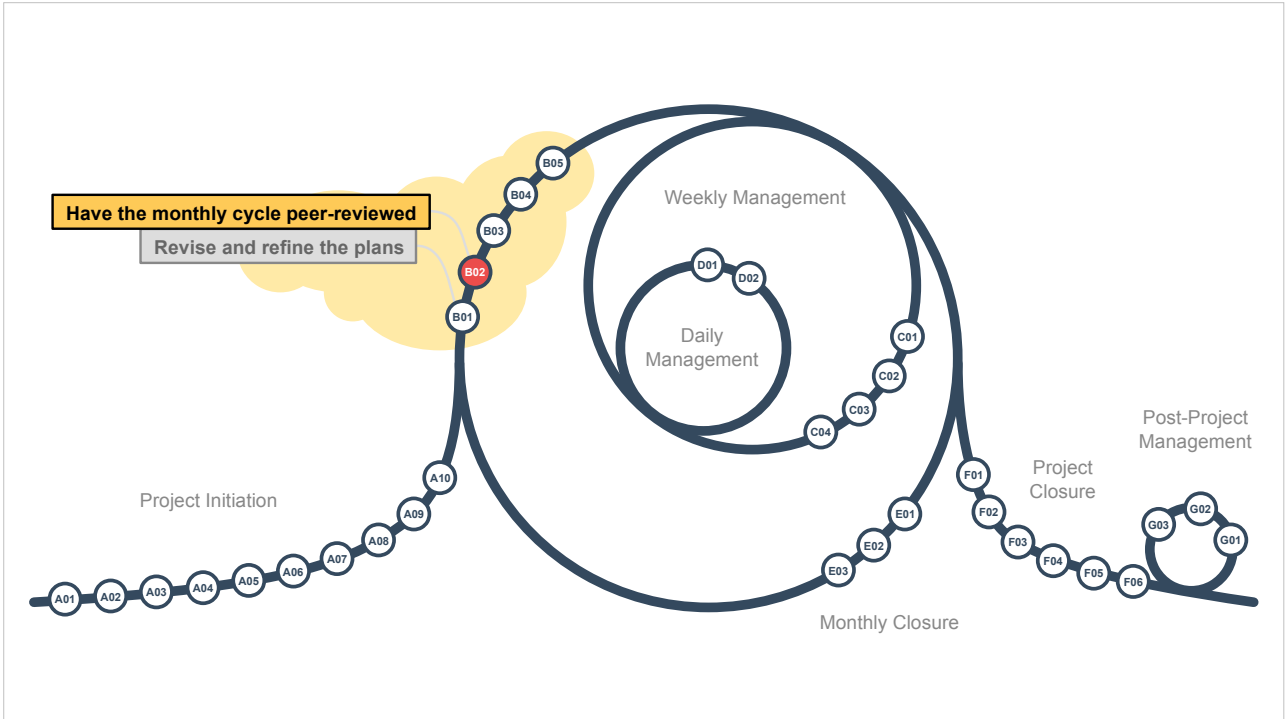


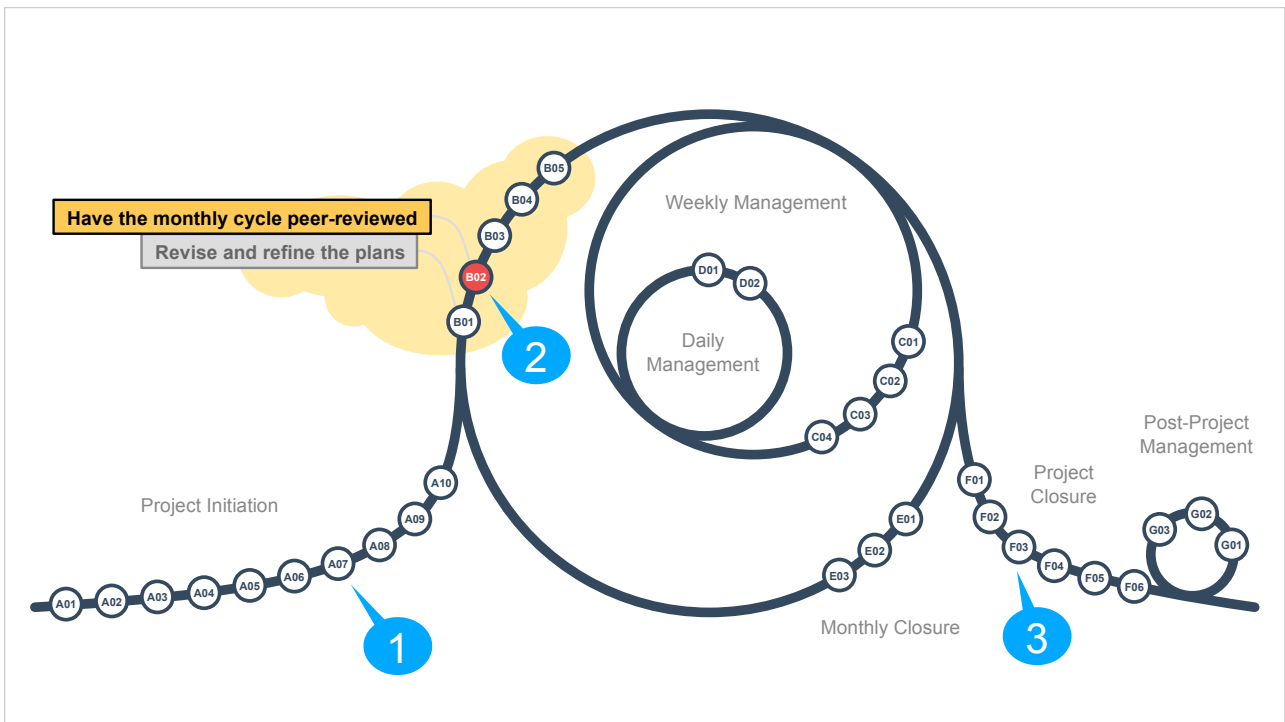
Follow-Up Register



Health Register







This is the second time we've discussed peer reviews. P3.express has 3 peer review activities, as shown in the image.

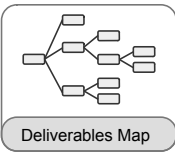
The nature and process are more or less the same. Still, it may be fair to say that the peer reviews for Project Initiation and Project Closure are more serious, and, for example, it may be a good idea to keep the best potential peer reviewers for these two.

1

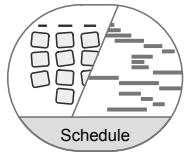


Project Description

2

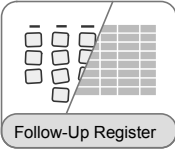


Deliverables Map



Schedule

3

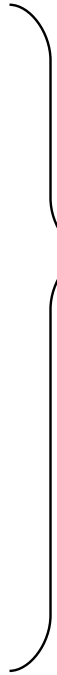


Follow-Up Register

4



Health Register



To be reviewed



Finding and fixing problems as soon as possible



Learning from each other



Peer Reviewer

A person with project management expertise, external to the project



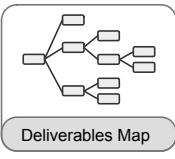
Project Manager

1

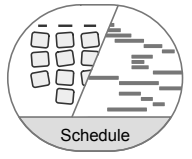


Project Description

2

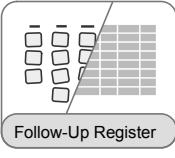


Deliverables Map



Schedule

3



Follow-Up Register

4



Health Register

Use a new person each cycle, if possible

Finding and fixing problems as soon as possible

Learning from each other

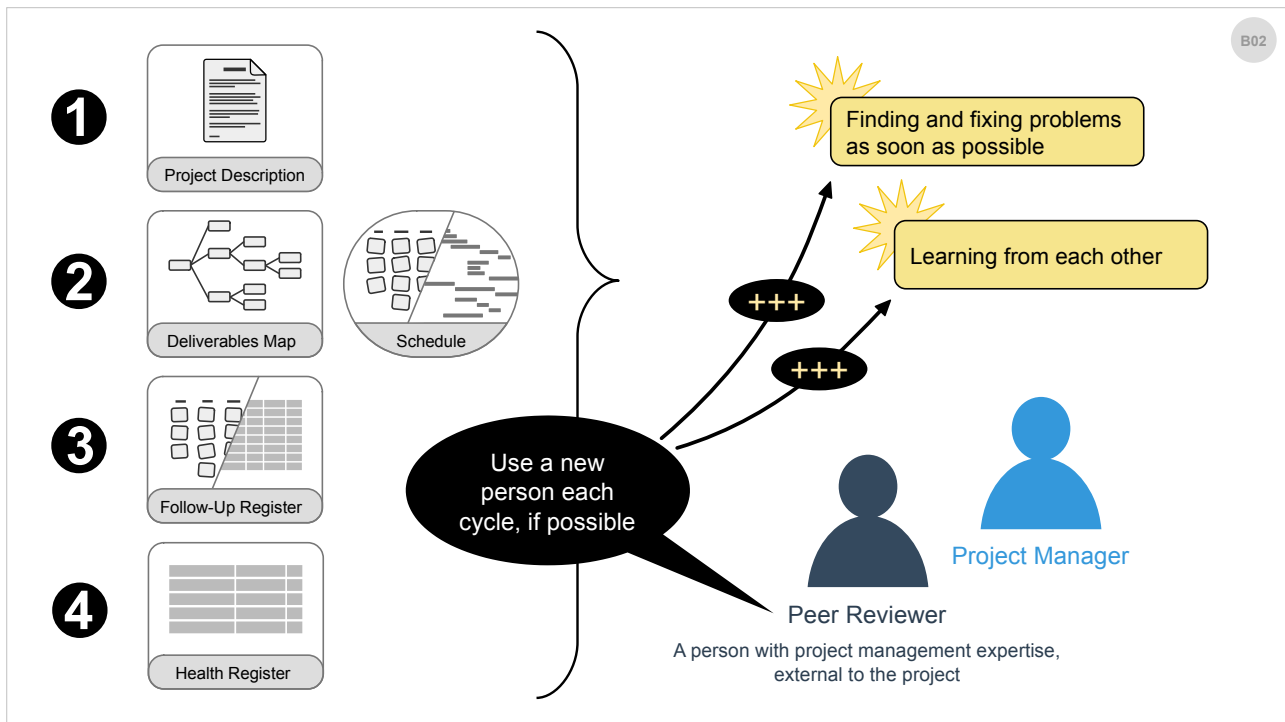


Peer Reviewer

A person with project management expertise, external to the project



Project Manager



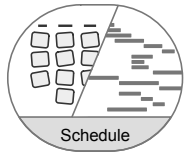
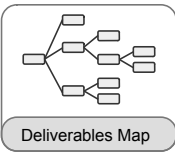
It's recommended to get help from a different peer each time (when possible) because it helps with both peer review purposes:

- Learning: Each new person brings new knowledge and experience that you can learn from, and also, more people get a chance to learn from you.
- Finding problems: Each person brings a new viewpoint and the possibility to find problems that the previous peer reviewers may have missed.

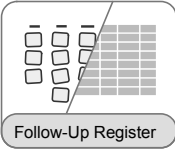
1



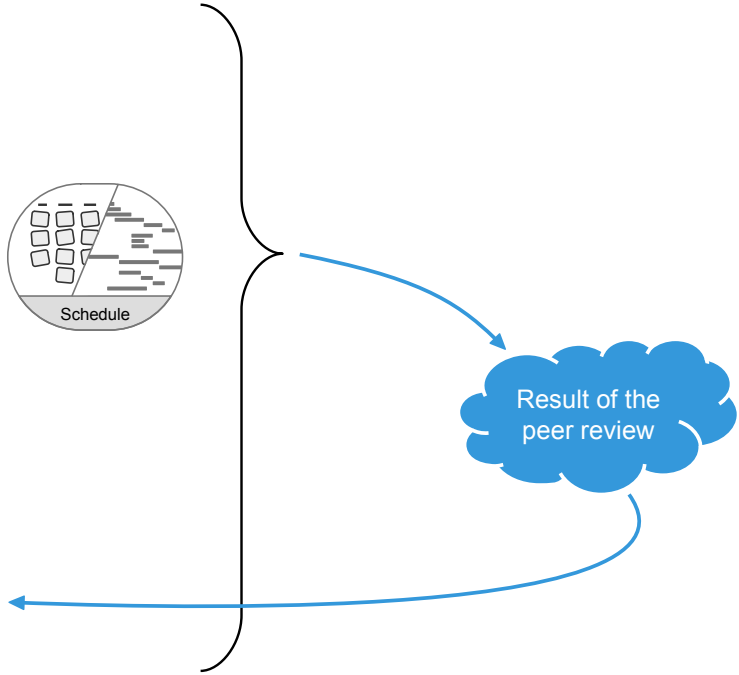
2

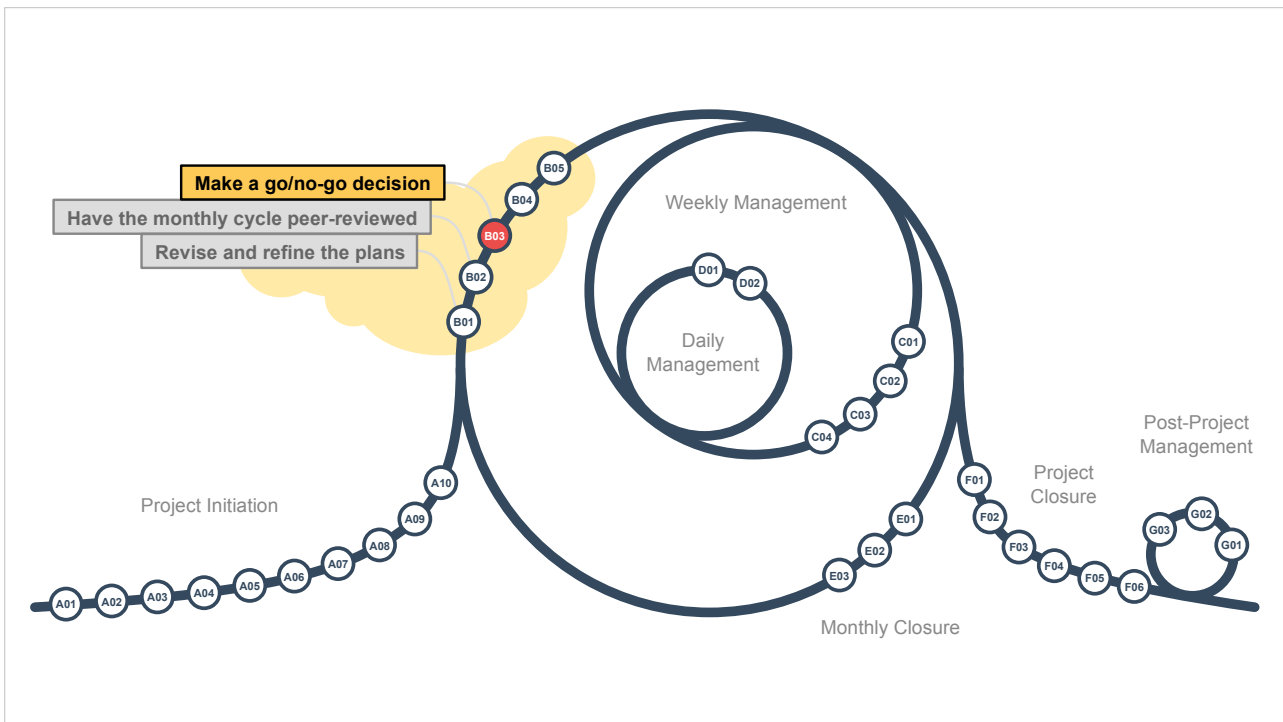


3



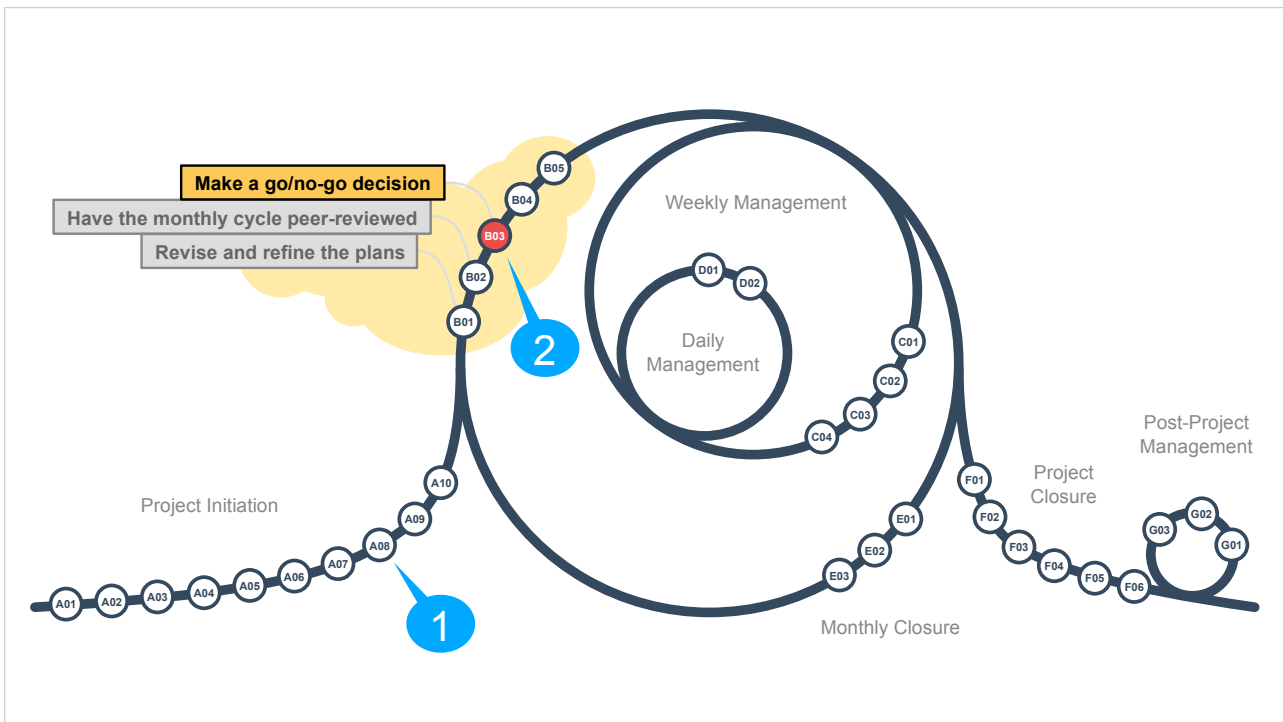
4





Note: This activity may cancel a project that is not justifiable anymore. When there's a project with dynamic scope and the sponsor decides that the current output is enough and it's best to close the project, it will NOT be considered a no-go decision. In this case, the sponsor will work with the team and adjust the plan to cancel the remaining deliverables. Then, there may be a partial cycle to close the remaining items and immediately proceed to Project Closure.

Deliverables that are deemed unnecessary will be "closed" as "canceled" items. We don't want to delete them because that would harm the integrity of our documents.



This is the second go/no-go activity. The previous one was a one-time activity that decides whether or not to execute the project, whereas this one is cyclic: We check to see whether it's a good idea to continue the project each month.

In most cases, the decision is “go”, but we still insist on having this activity and making it a conscious decision. It's helpful because

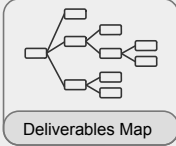
- it ensures that we're not wasting resources on an unjustifiable project and
- is a continual reminder that the project must be justifiable. This reminder encourages everyone to stay aligned with the high-level goals.

1

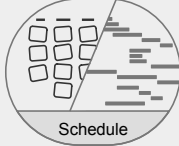


Project Description

2

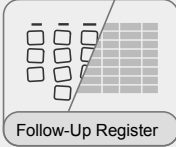


Deliverables Map



Schedule

3



Follow-Up Register

4



Health Register

So, this is our latest understanding of the project. Shall we continue with the next cycle?



Project Manager



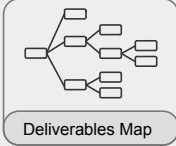
Sponsor

1

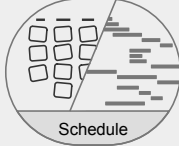


Project Description

2

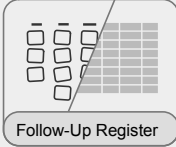


Deliverables Map



Schedule

3



Follow-Up Register

4



Health Register

So, this is our latest understanding of the project. Shall we continue with the next cycle?

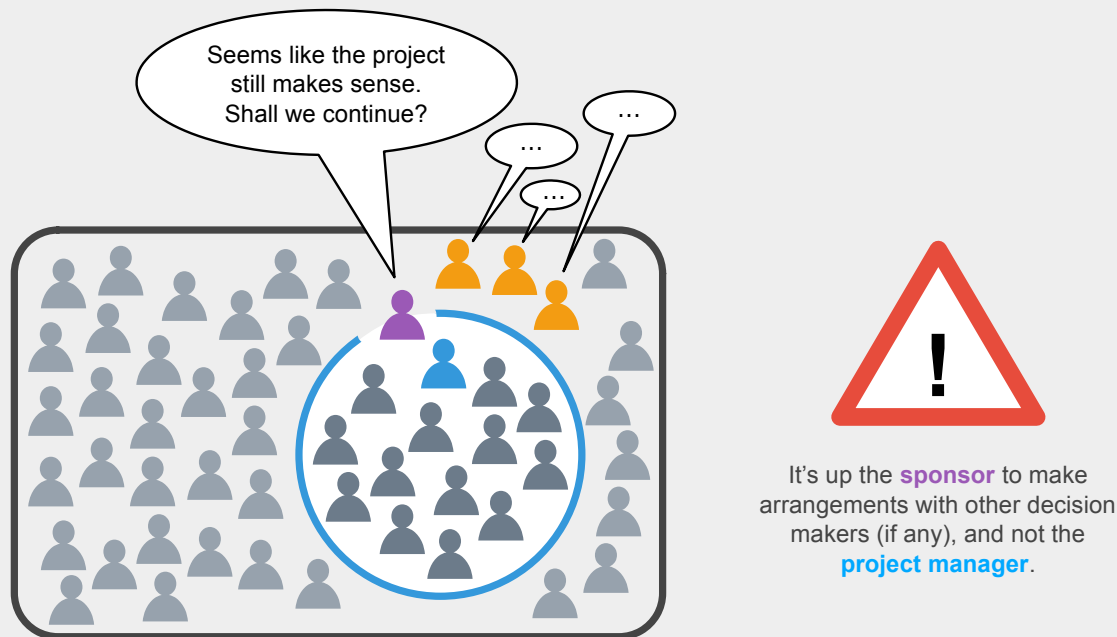


Project Manager

Hmm... let me check with a few people and get back to you.



Sponsor

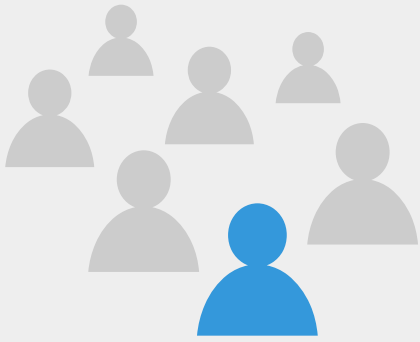
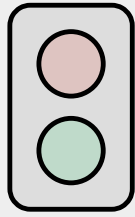


Ideally, there would be a business case in the higher management layers (e.g., portfolio management). It will be updated based on the information generated in the Monthly Initiation activity group. Then the updated business case would be used to judge whether or not it's a good idea to continue the project.

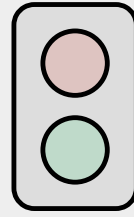
Note that when there's a structured, effective portfolio management system, a project may be canceled not only because of losing its justification but also because new opportunities are formed, and there are other projects we can do instead that are much more beneficial.

Furthermore, the go/no-go decisions in the portfolio management system are not limited to evaluating the benefits (justifiability) of projects but also about creating a balanced portfolio that serves all value drivers (e.g., sustaining the current business and innovation).

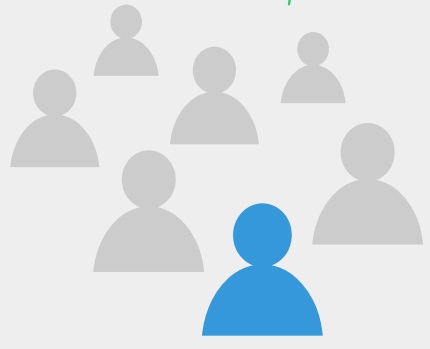
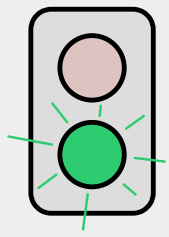
World #81



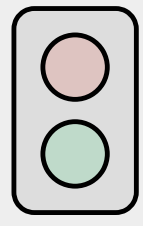
World #82



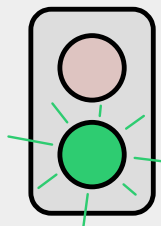
World #81



World #82



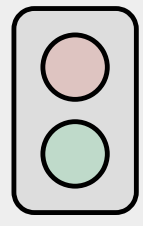
World #81



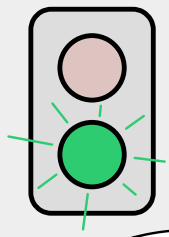
OK... let's
move on to the
next activity!



World #82



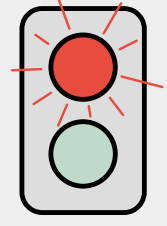
World #81



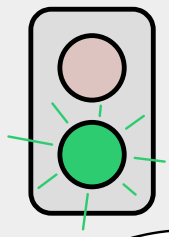
OK... let's move on to the next activity!



World #82



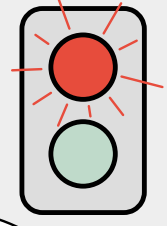
World #81



OK... let's move on to the next activity!

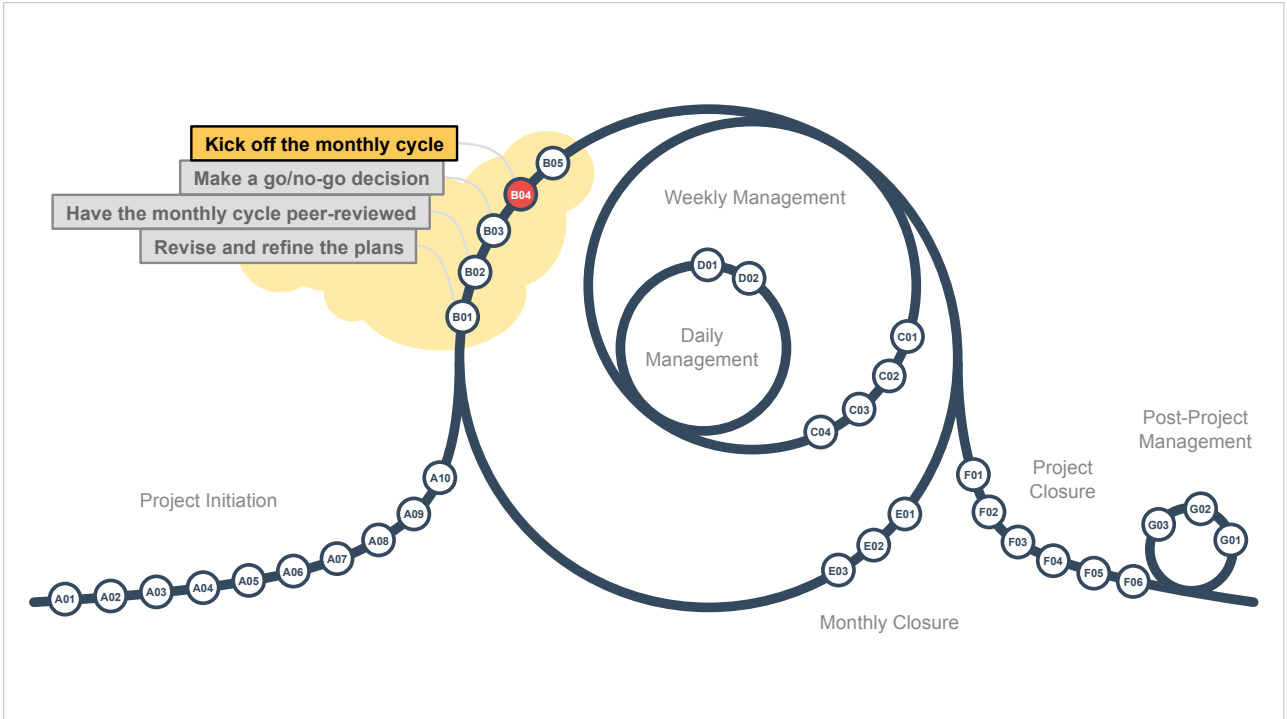


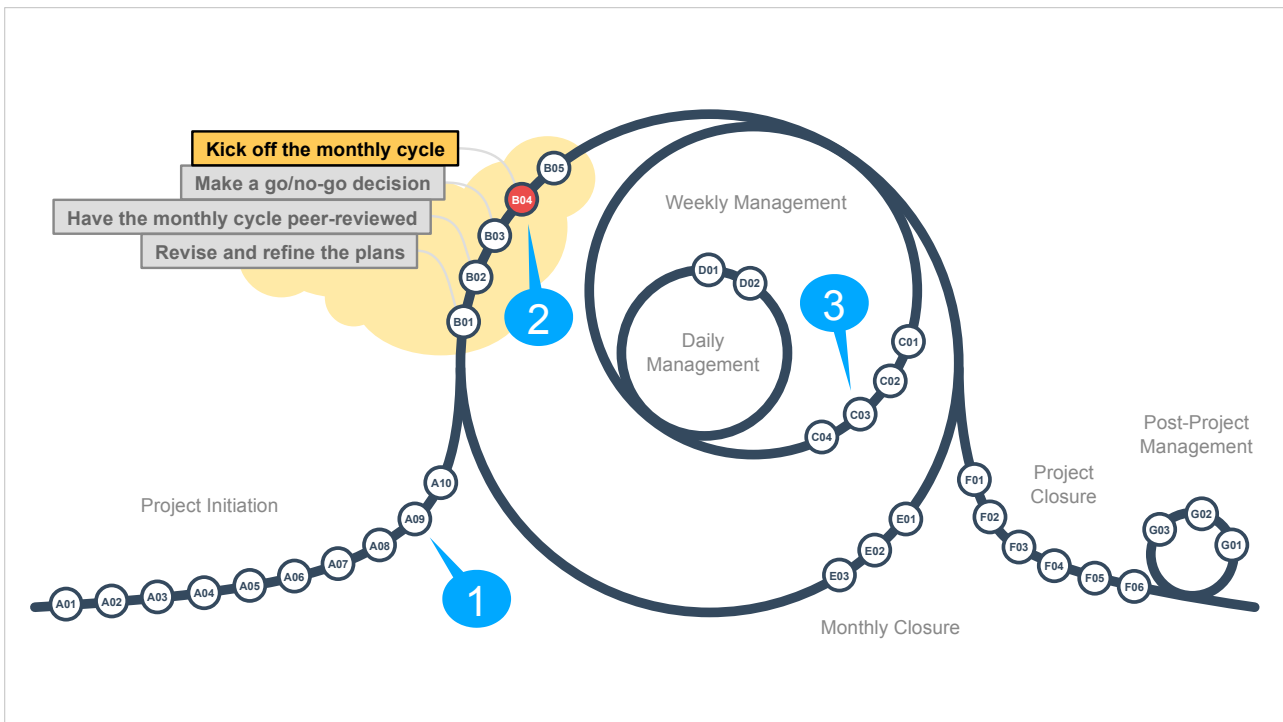
World #82



Oh... OK... let's go to Project Closure activities.

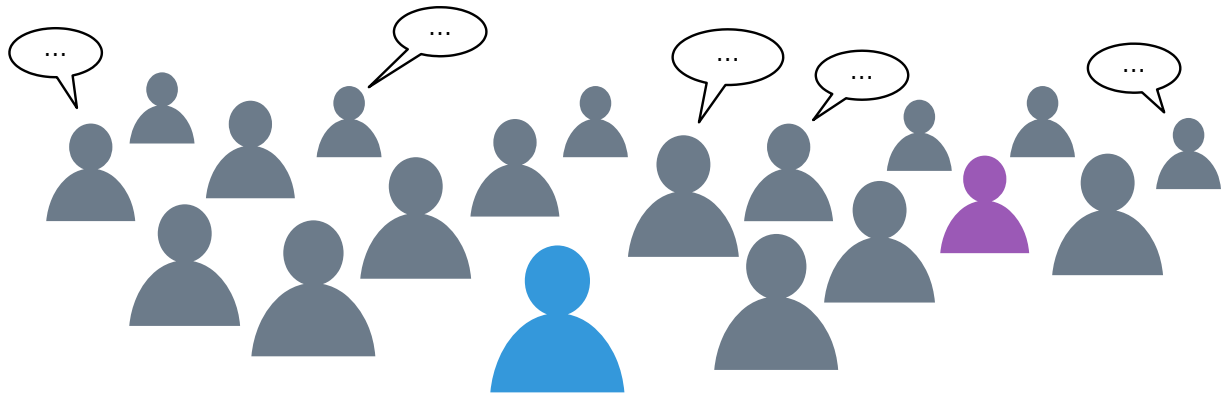




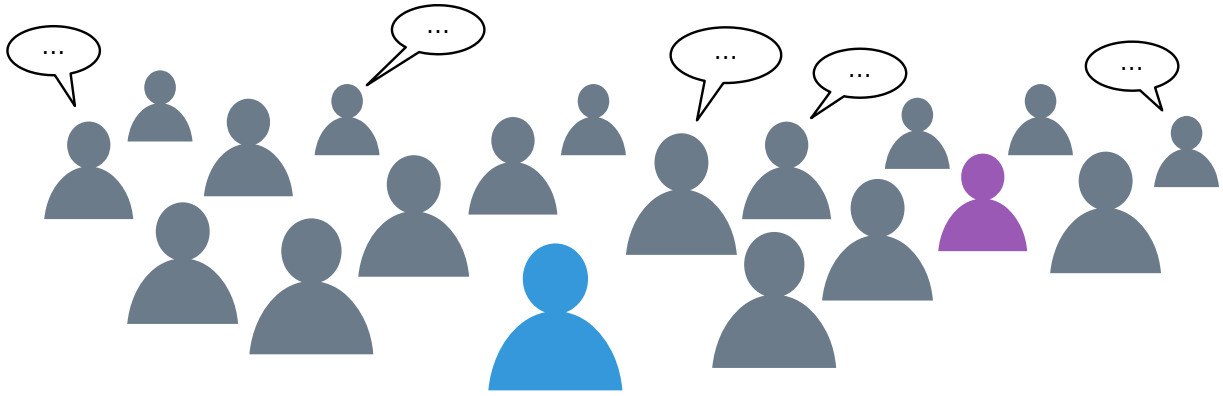


This is the second kick-off activity. The previous one was the most important one (for the project as a whole). This one is smaller and kicks off the monthly cycle. As a result, it will be shorter and simpler. The next one, the weekly kick-off, should be even shorter and simpler than this one.

The kick-off of the Project Initiation group is for all relevant stakeholders, whereas this one is mainly for the team members.

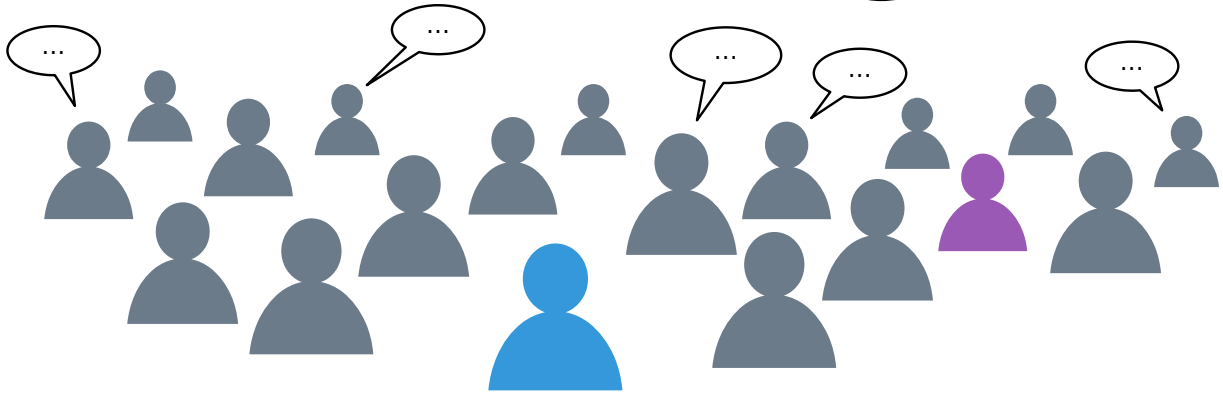


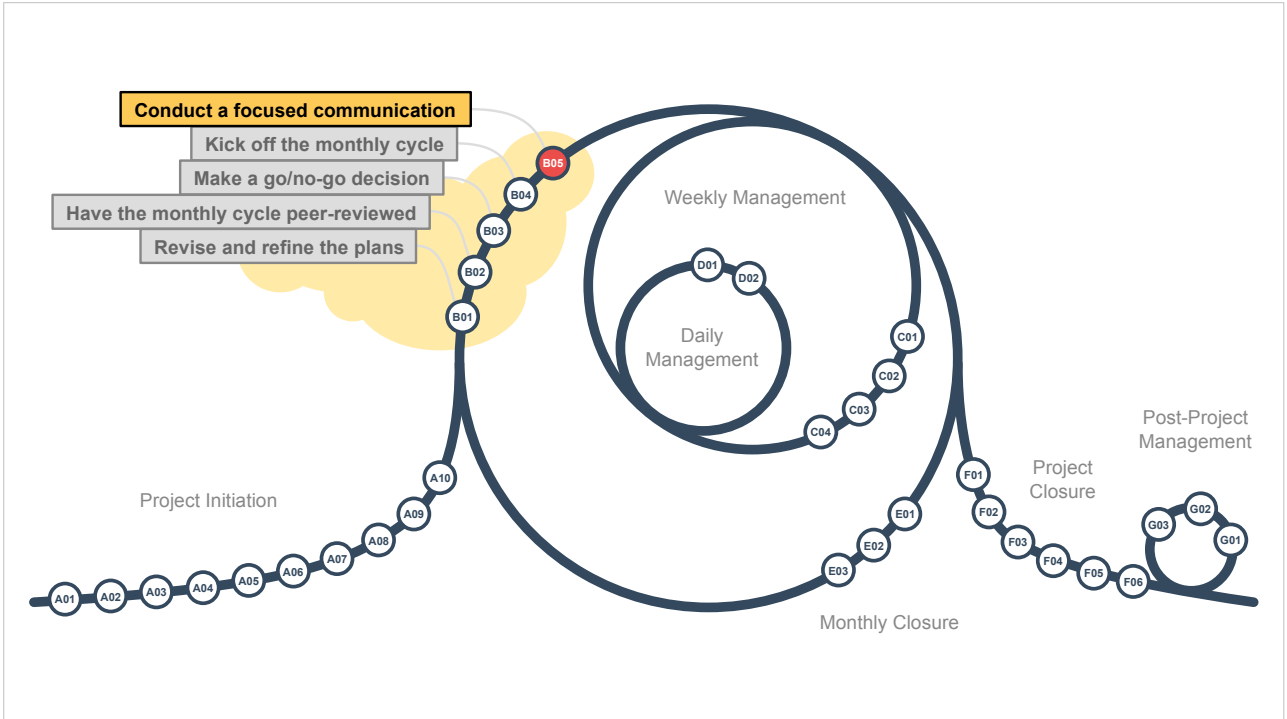
Team building

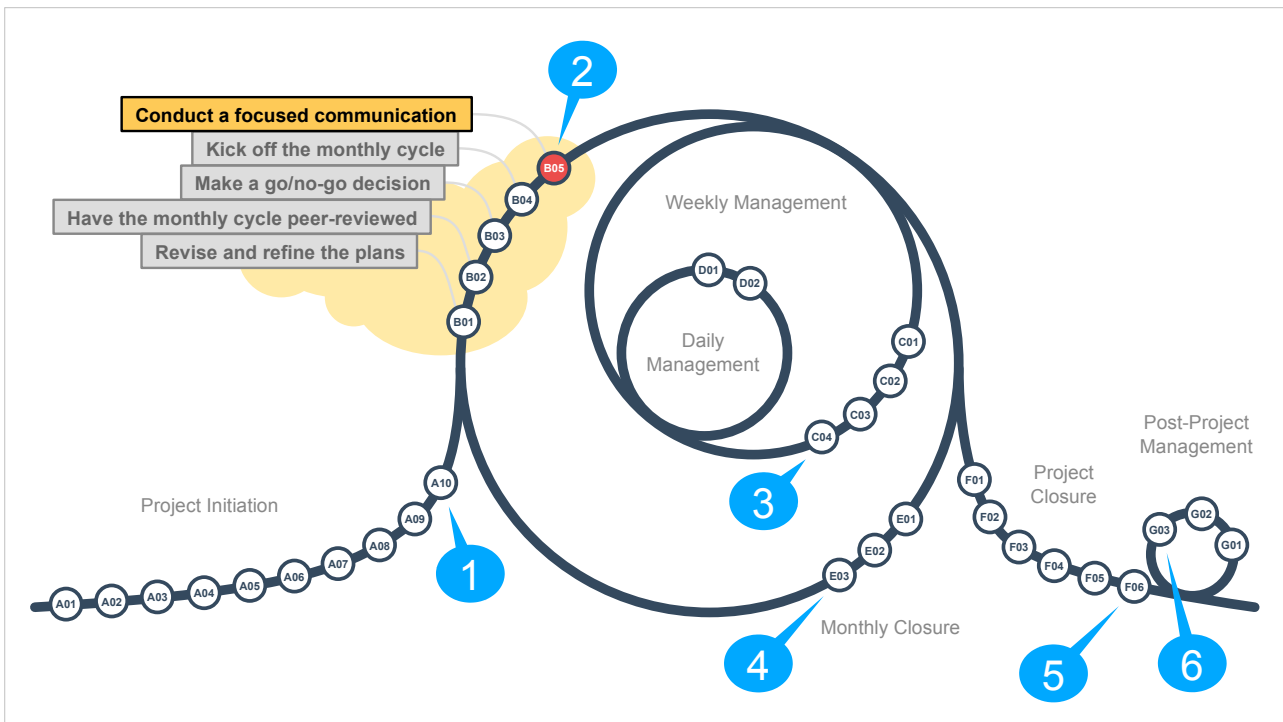


Team building

Reviewing the plan for the upcoming month



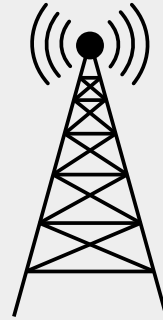
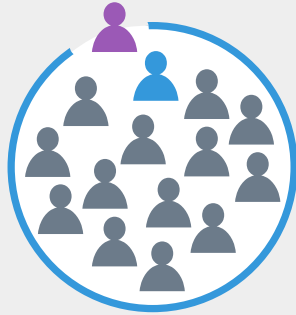


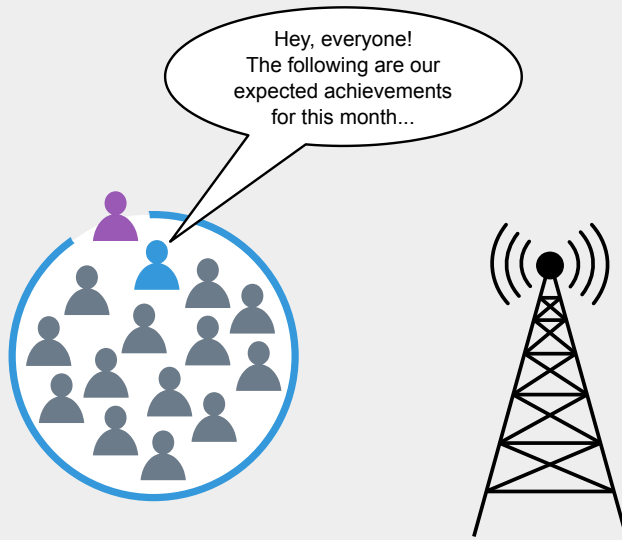


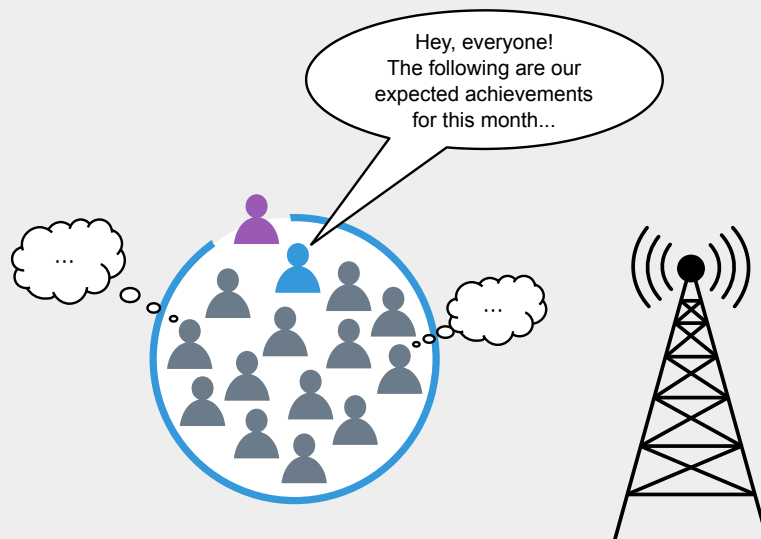
There are 6 focused communication activities in P3.express; one at the end of each activity group, except for Daily Management.

Each focused communication has a predefined

- purpose,
- audience, and
- message.



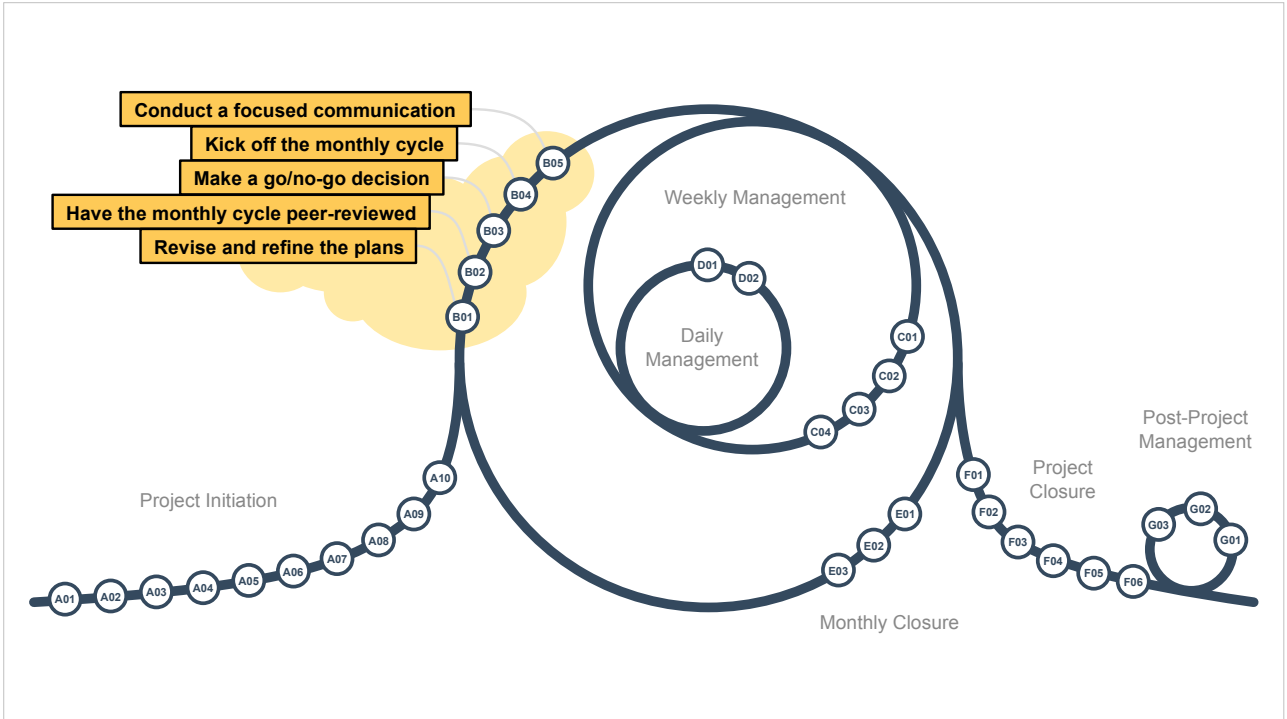




This activity complements the kick-off by providing a short overview of the achievements planned for the upcoming month. Sharing them helps discover potential conflicts or opportunities.

We also keep it focused on the planned achievements rather than tasks to encourage team members to think holistically and not in terms of isolated specialist activities.

Remember that it's a monthly activity, and therefore, it's best to keep the messages short; otherwise, people may ignore them.



① High-level overview

② Full review

Ⓐ Project Initiation

Ⓑ Monthly Initiation

Ⓒ Weekly Management

Ⓓ Daily Management

Ⓔ Monthly Closure

Ⓕ Project Closure

Ⓖ Post-Project Management

③ NUPP

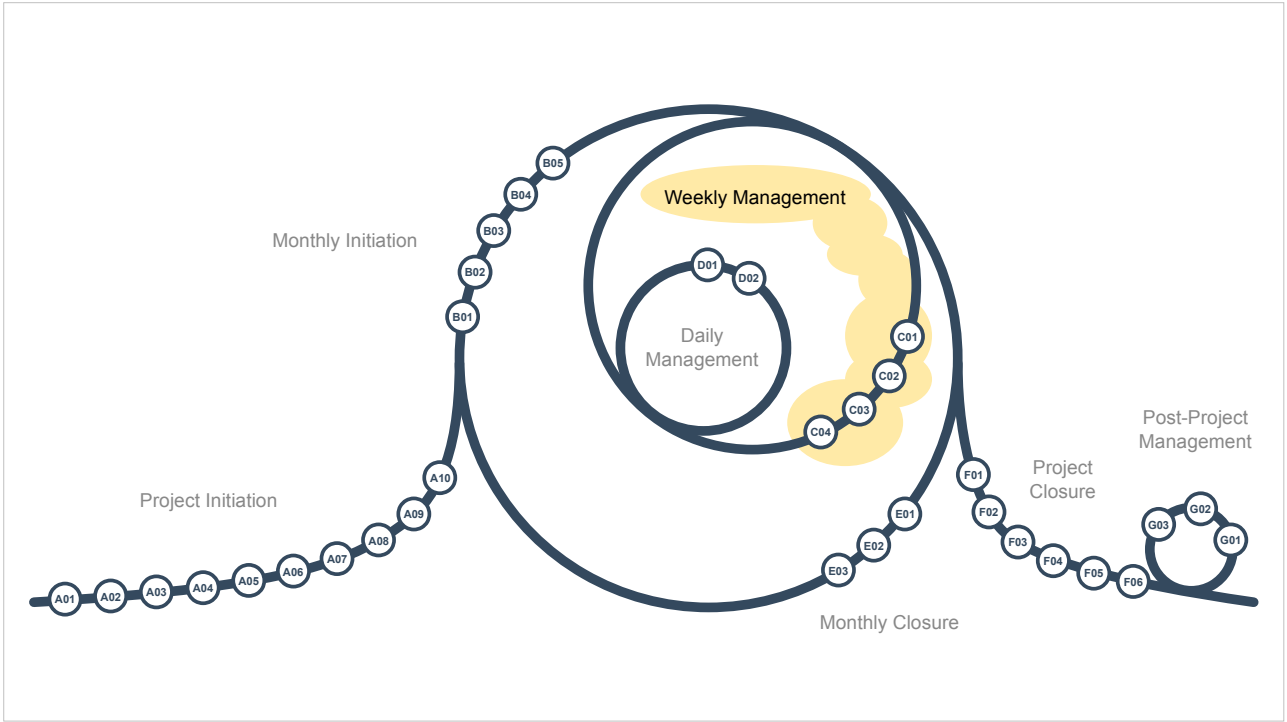
④ Tailoring

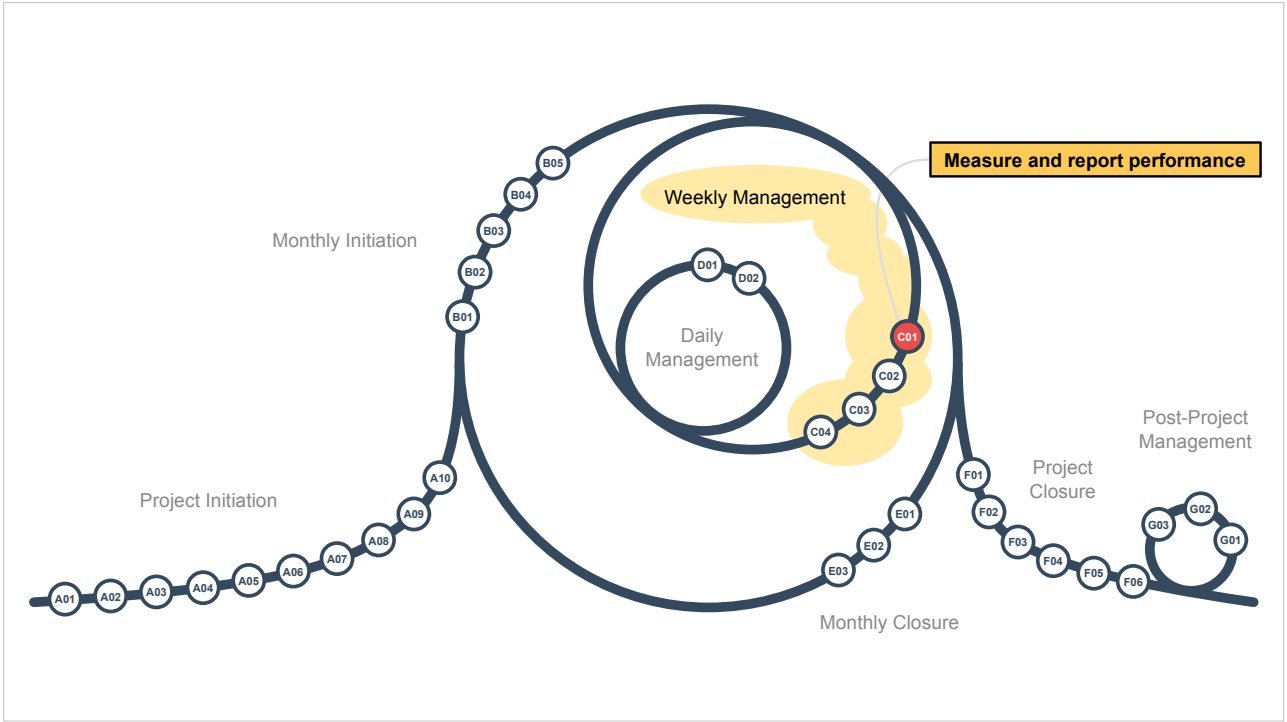
⑤ Development methods

⑥ Code of conduct

⑦ Certification program





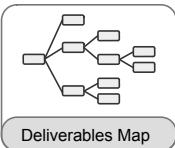


1

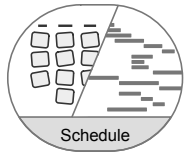


Project Description

2

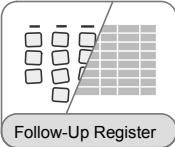


Deliverables Map



Schedule

3



Follow-Up Register

4



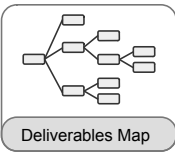
Health Register

1



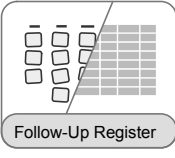
Project Description

2



Deliverables Map

3

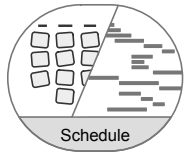


Follow-Up Register

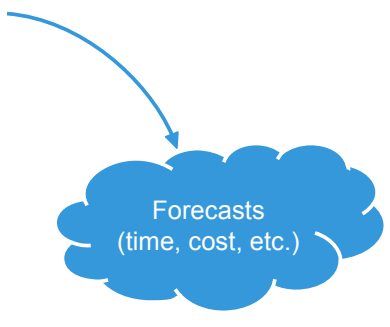
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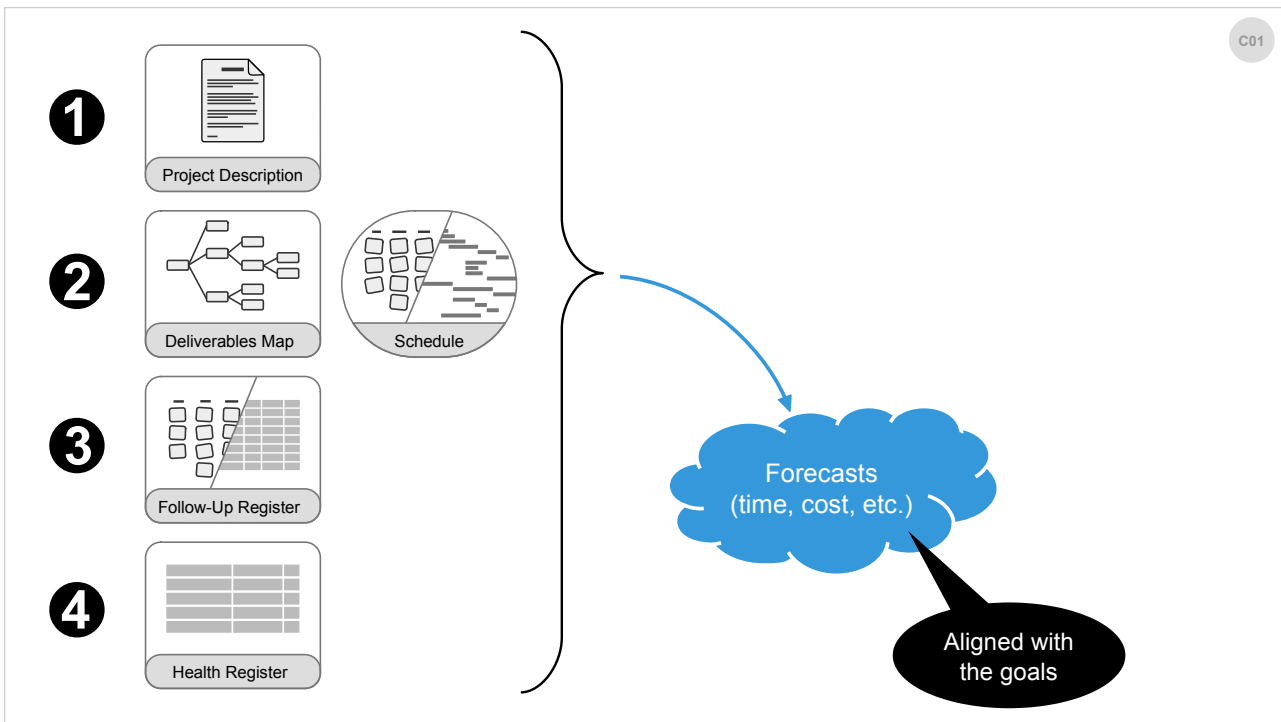
Health Register



Schedule



Forecasts
(time, cost, etc.)

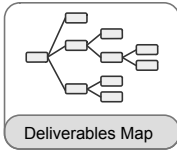


The main measurement is forecasting for time, cost, etc. Other measurements, such as actual to planned values, may be necessary to create the said final results, but they are not the main subject of measurements.

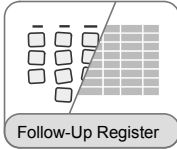
1



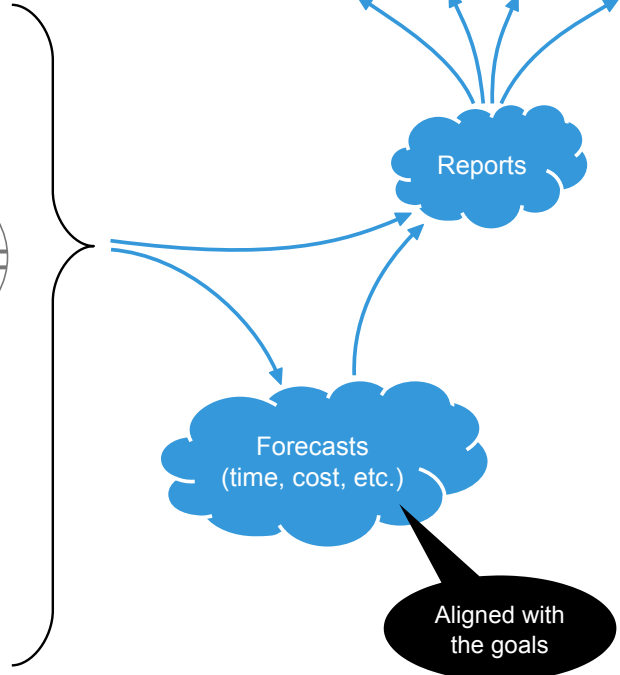
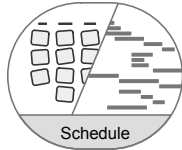
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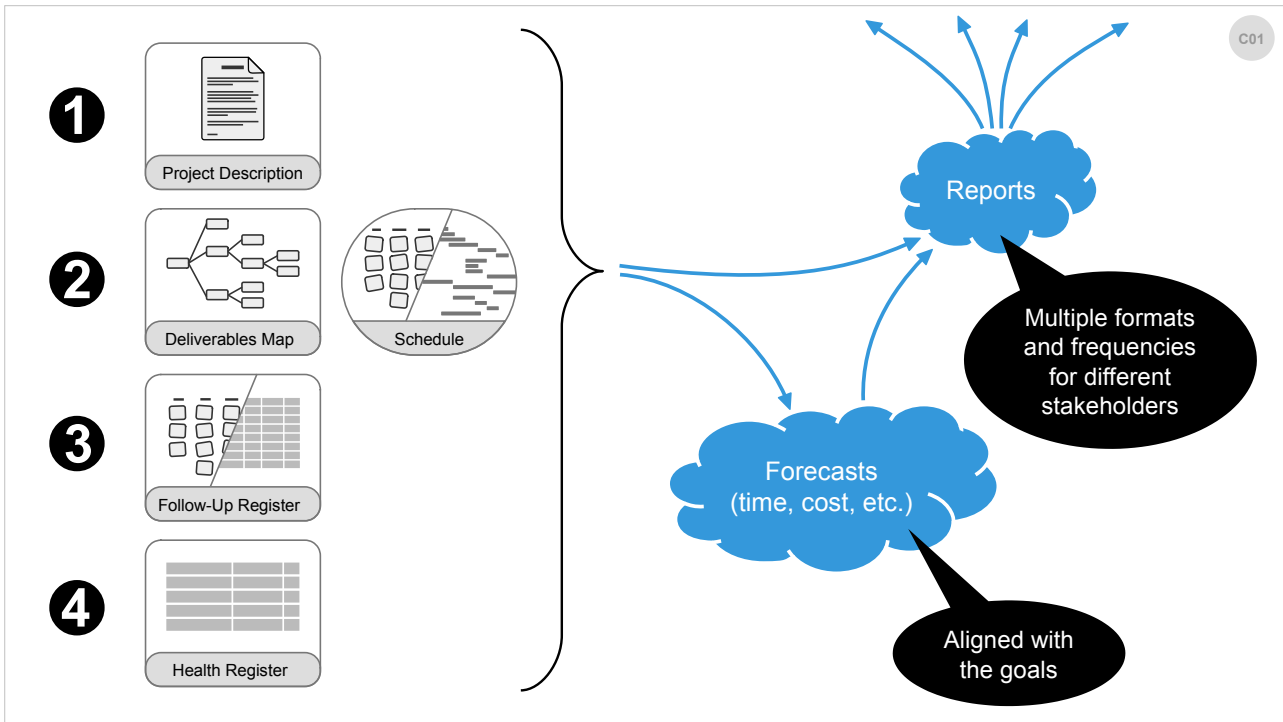


3



4





We should ensure recipients read and understand the reports because, that way, they will be more supportive, and we will have fewer surprises in the future.

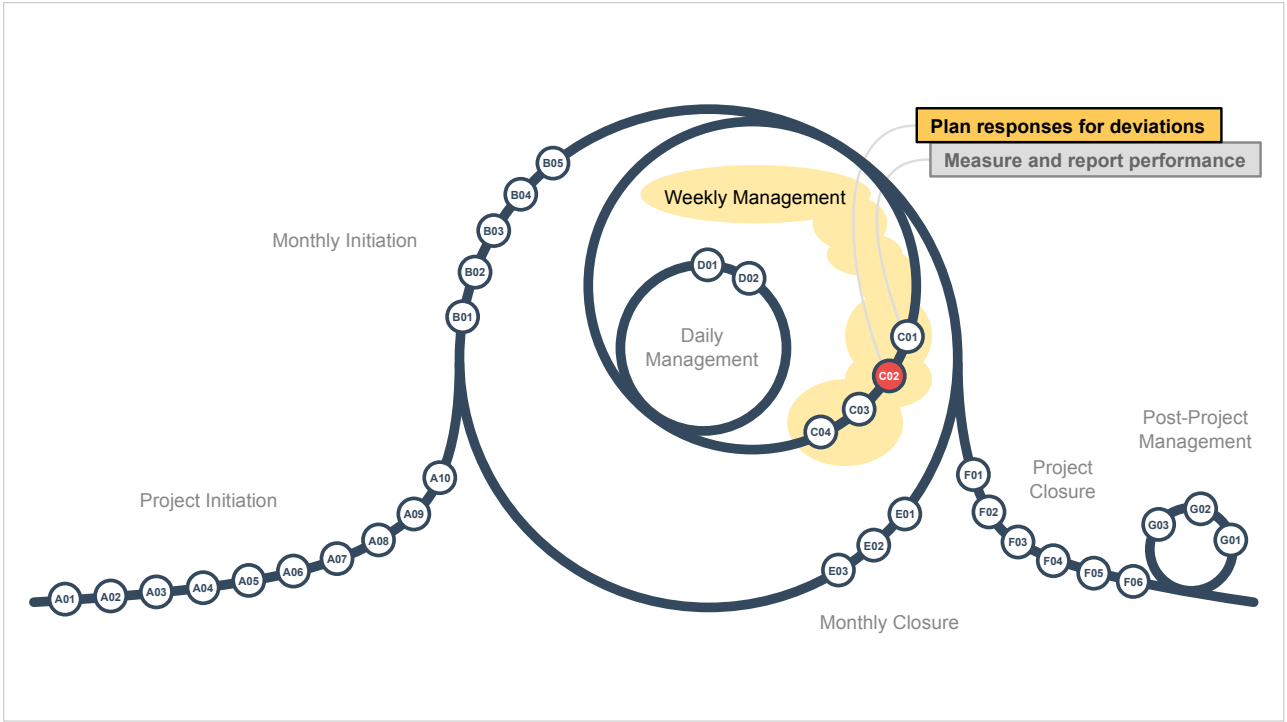
Various stakeholders have different backgrounds and expectations, so a single report may not satisfy them. As a result, it's usually necessary to create more than one reporting template for each group of stakeholders. You can add a column to the stakeholders list in Project Description to record which type of report (or none at all) should be sent to them.

How would you improve the effectiveness
of your reports?



E.g., some people ask for detailed reports because it ensures them that you have enough data and the capability to process them. However, they are too busy to read such a report, and therefore, the main message of the report won't be communicated. To overcome this issue, you can send a detailed report and a short, one-page report to ensure they read it.

After a while, they may even ask you to stop sending the detailed report!

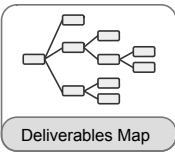


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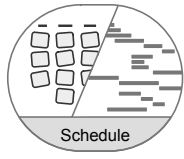


Project Description

2

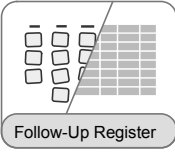


Deliverables Map



Schedule

3

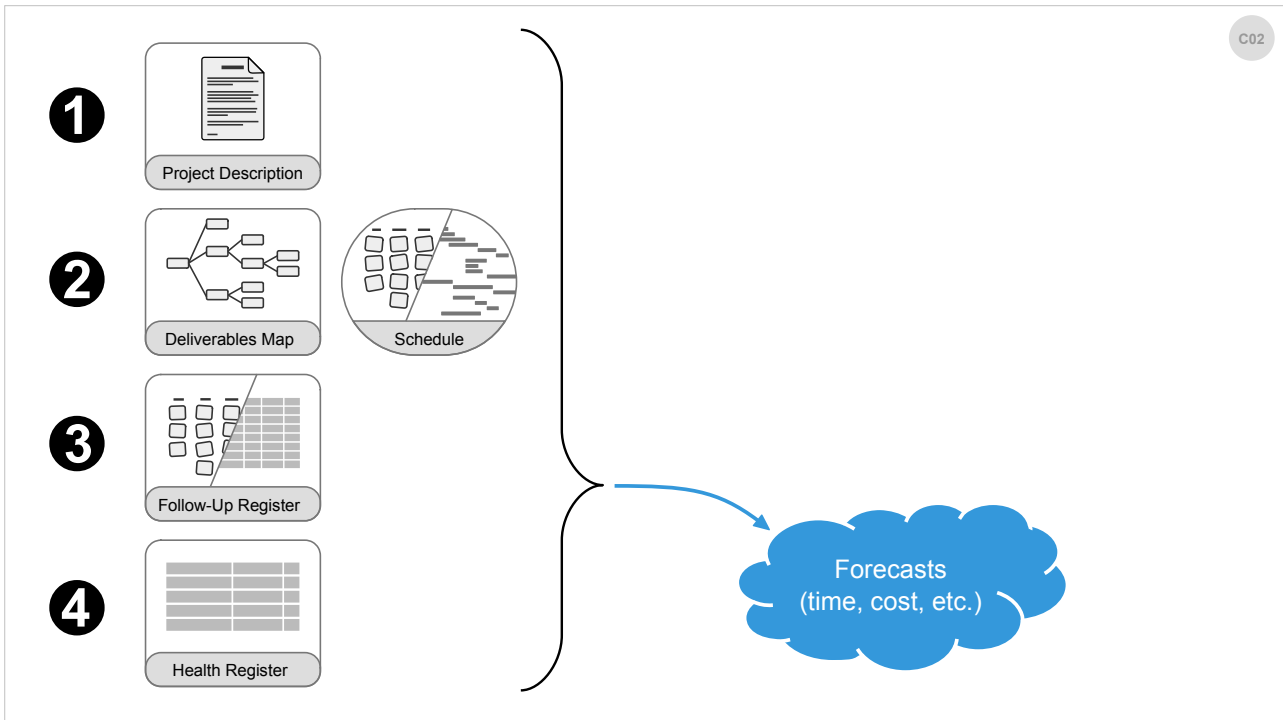


Follow-Up Register

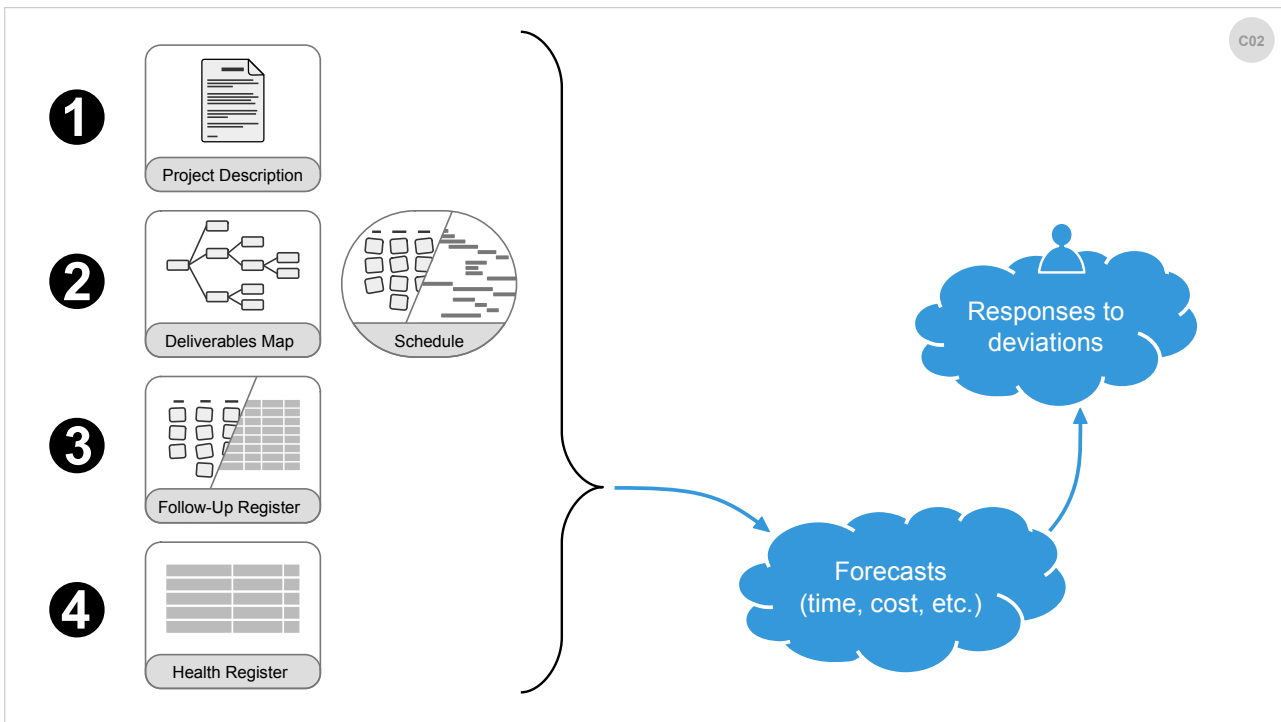
4



Health Register



The forecasts created in the previous activity are the starting point here...

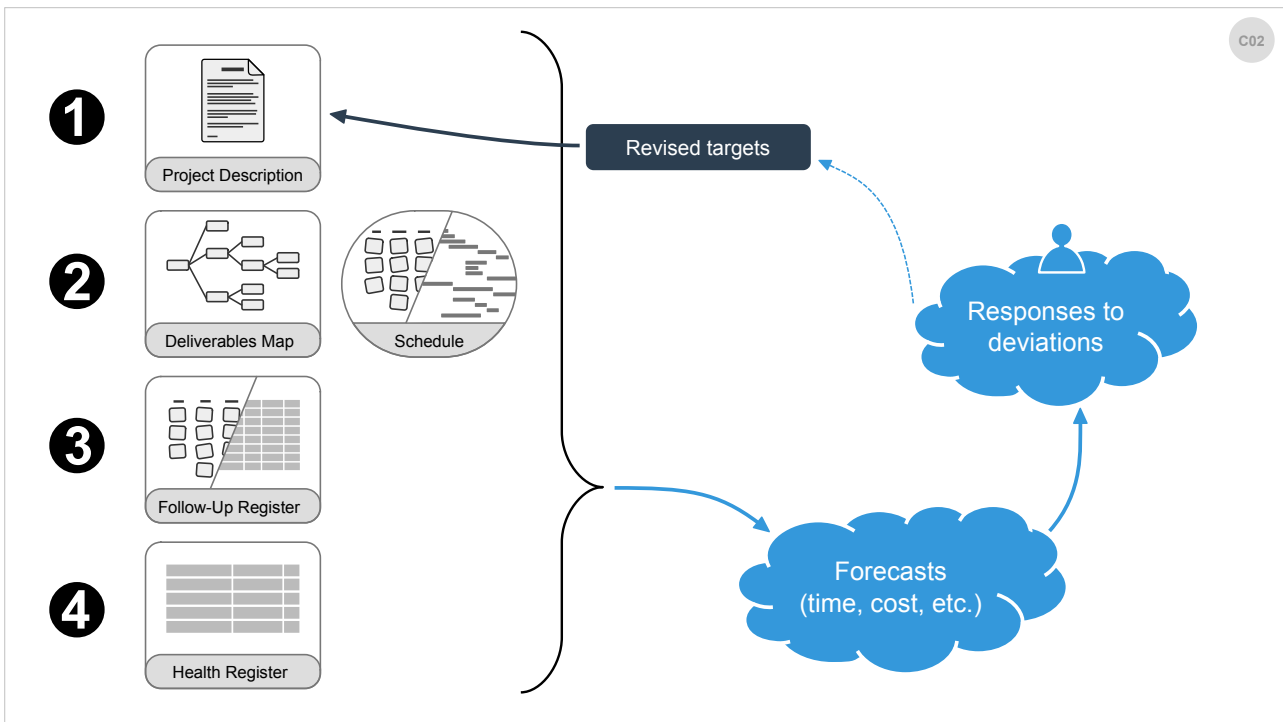


Forecasts show deviations; for example,

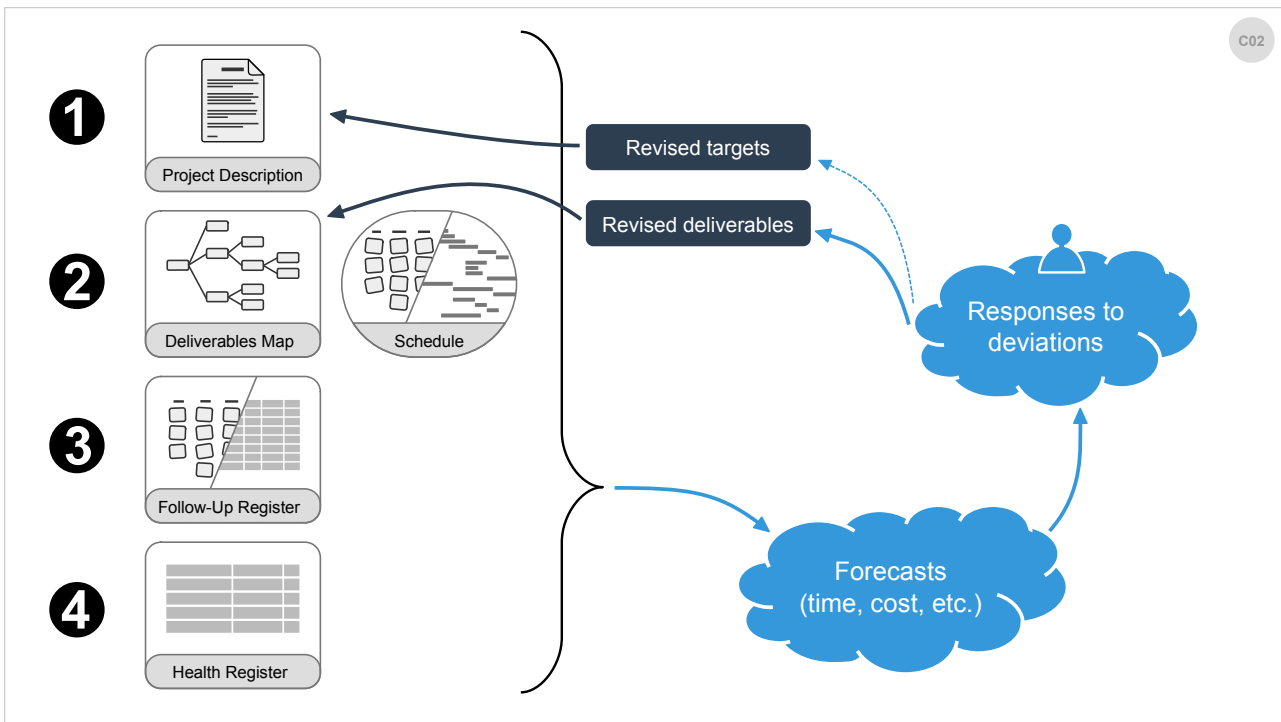
- We were supposed to finish the project in 18 months, but our latest forecast shows it will probably end in 19 months. There's a 1-month deviation.
- We have a 1200 Artopool budget for the project, but if we work like this, we'll finish the project with 1220 Artopools. There's a 20-Artopool deviation.

("Artopool" is the imaginary currency from the Artophile Center project simulation.)

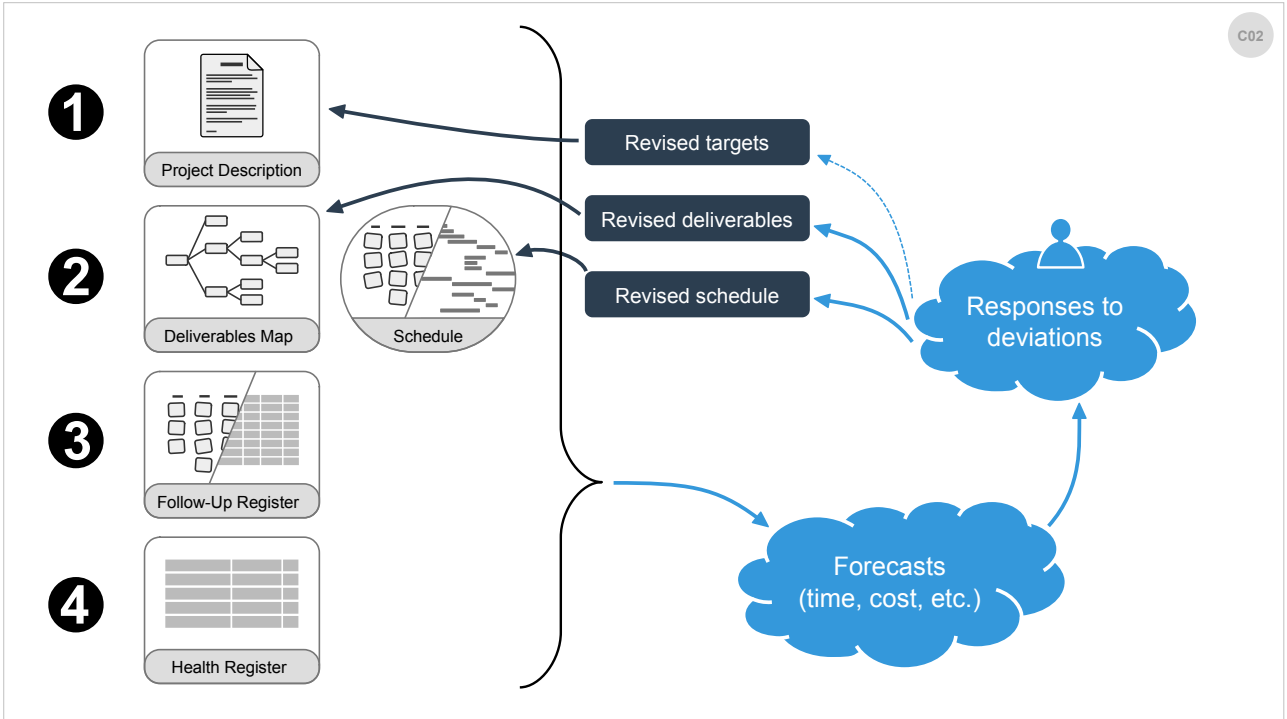
When there's a deviation, we should respond to it; i.e., what are we going to do with it? If it's an undesirable deviation, how are we going to recover from it? If it's positive, do we need to use this opportunity to make any positive changes?



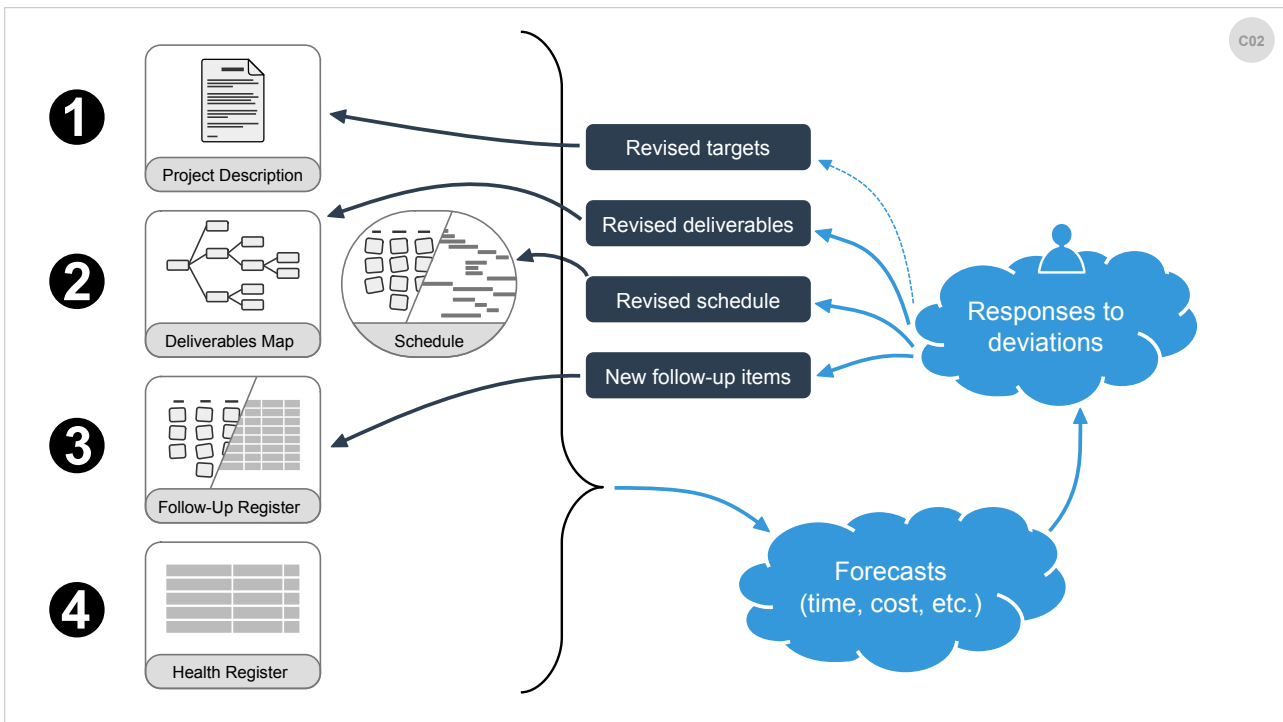
One possible response is to change the targets; e.g., we've thought about every option, and there's no acceptable option, but to change the expected duration from 18 months to 19 months.



E.g., we can cancel a few low-priority deliverables to finish the project on time and within budget.



E.g., we can create two of the previously sequential deliverables in parallel to save some time.

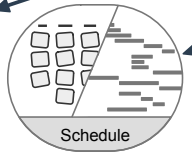
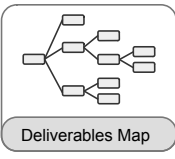


E.g., we can save time if we change how we communicate with our external customer and make it more effective.

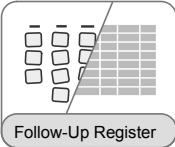
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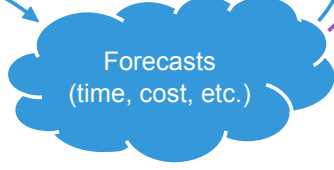


Revised targets

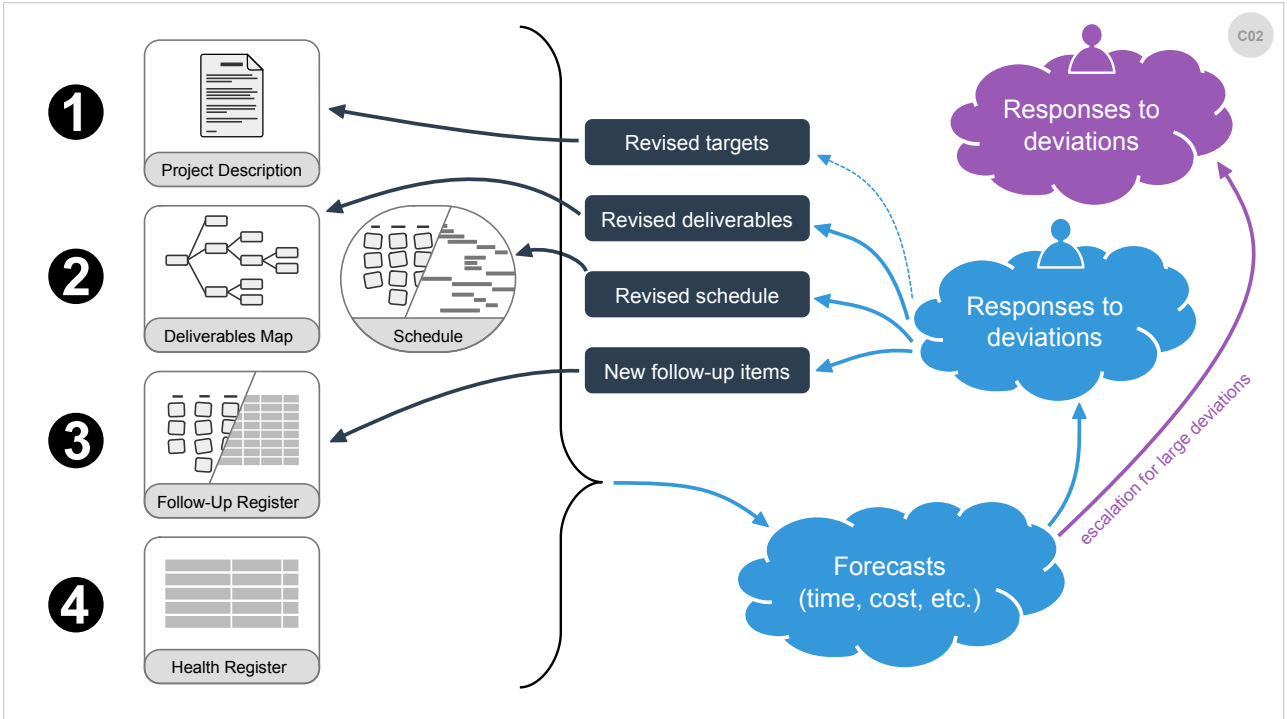
Revised deliverables

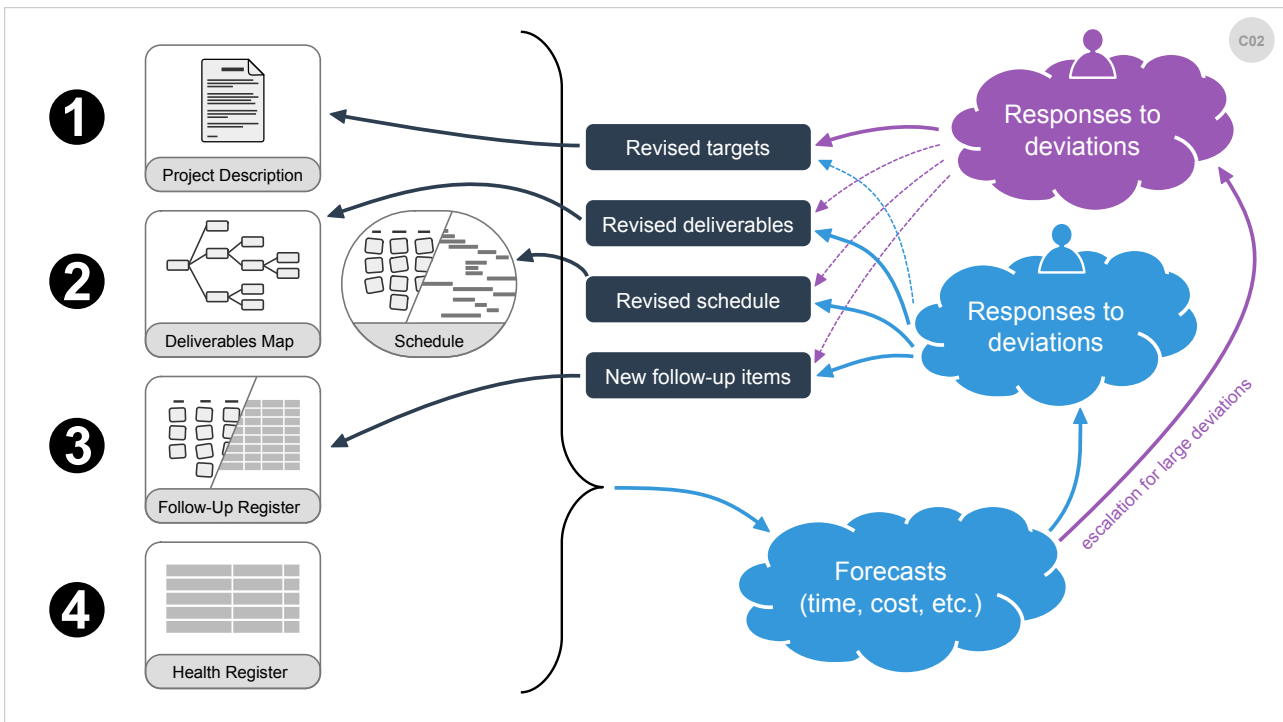
Revised schedule

New follow-up items



escalation for large deviations





If the deviation and its response are lower than a certain threshold, the project manager will decide; otherwise, the sponsor should be involved.

The thresholds can be implied, undocumented, and intuitional. However, if needed, they can become explicit; e.g., responding to any deviation above one month should be done by the sponsor. If you set explicit thresholds, they should be added to the Project Description.



This is too complicated!

Responses to deviations

This is too complicated!

Responses to deviations

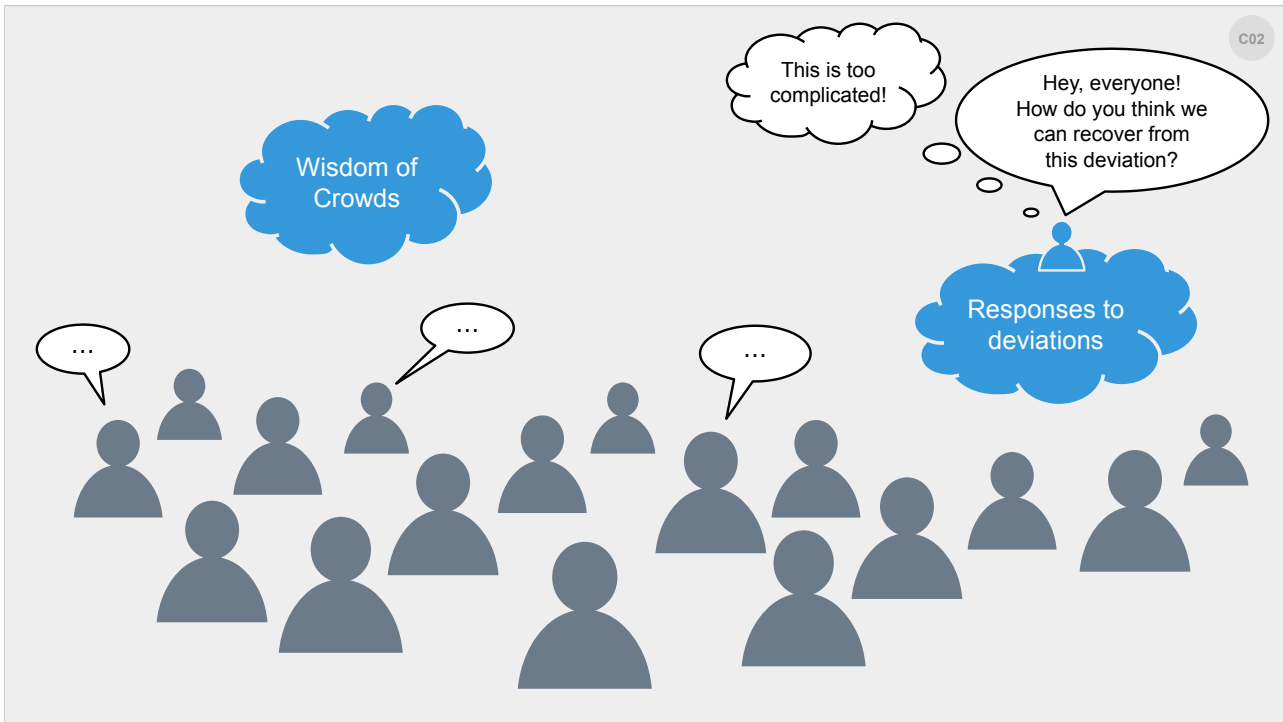


This is too complicated!

Hey, everyone!
How do you think we can recover from this deviation?

Responses to deviations





The project manager may design the responses alone, but involving at least the key team members is always a good idea.

Sometimes the situation is too complicated. In that case, involving all team members and using the Wisdom of Crowds to generate good ideas can be helpful for two reasons:

- They can develop exciting ideas that a small group of key team members can't.
- They will feel appreciated, and since they've come up with the response, they will fill ownership and do their best to make it happen.

“Sometimes, working on more deliverables in parallel can increase speed and help recover from deviations.”

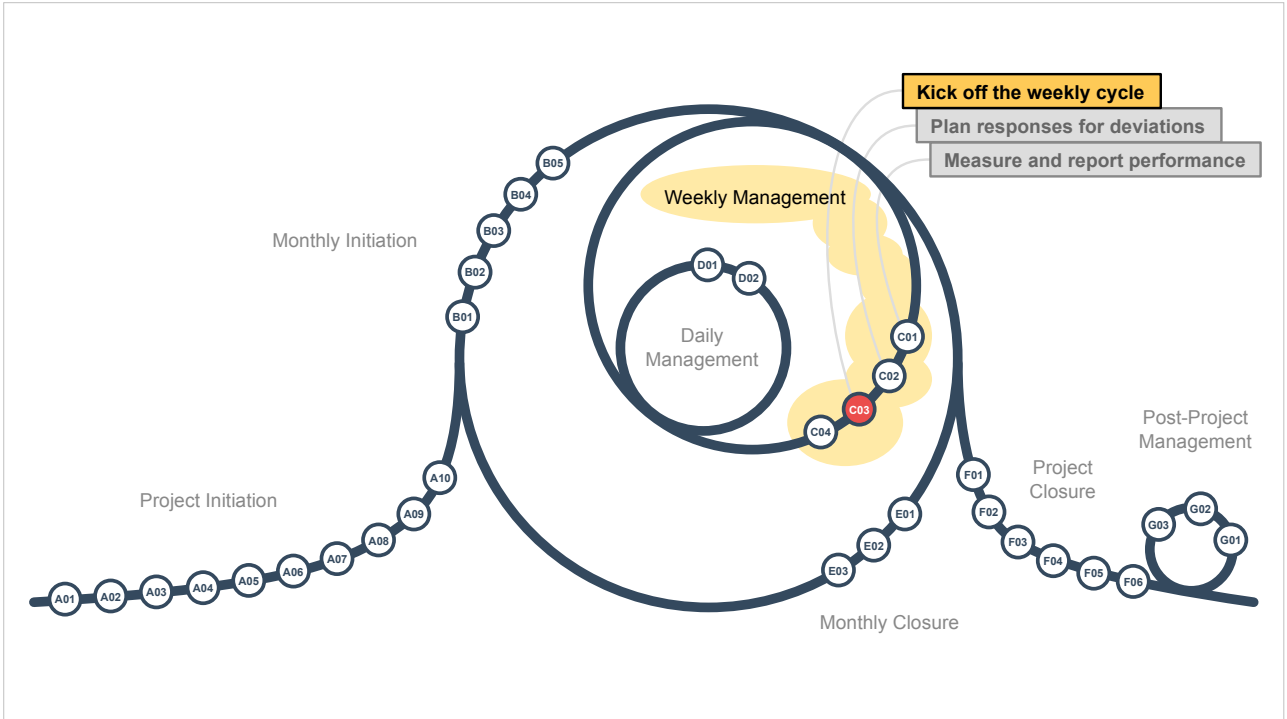
Do you agree?

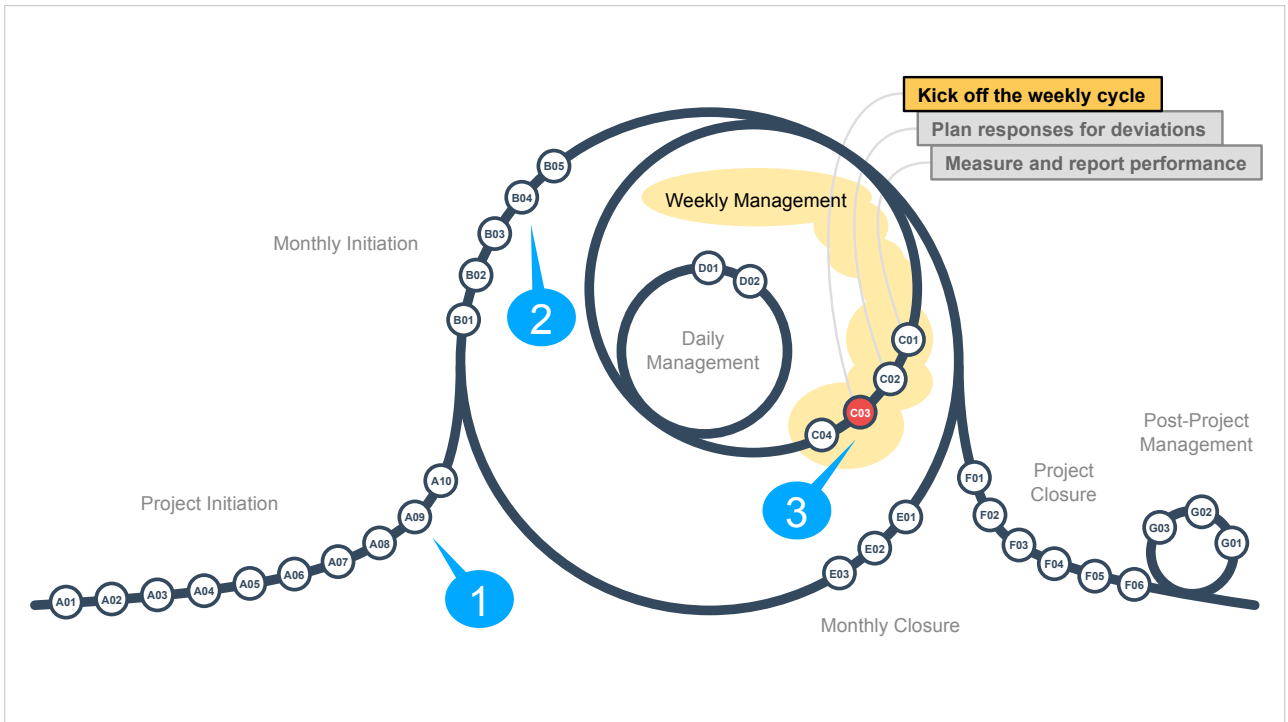


It usually makes the work more complicated and increases risks.

It doesn't mean we shouldn't do parallel work; there's an optimum amount of parallel work depending on the type of work, and we need to be aware of it. This amount is usually lower than what most people expect.

We also talk about encouraging people to reduce parallel work to its optimum amount daily in D02.





This is a weekly kick off, so it must be short and simple.



Reviewing the deliverables and follow-up items for the upcoming week



Encouraging teams to limit work in progress

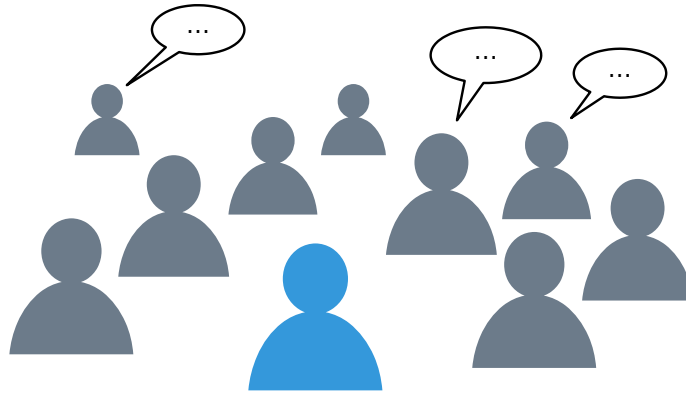
Reviewing the deliverables and follow-up items for the upcoming week



Discovering conflicts

Encouraging teams to limit work in progress

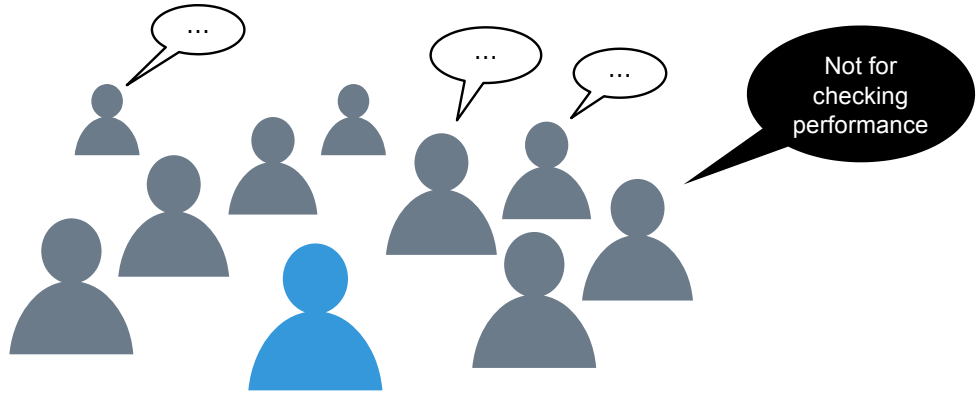
Reviewing the deliverables and follow-up items for the upcoming week

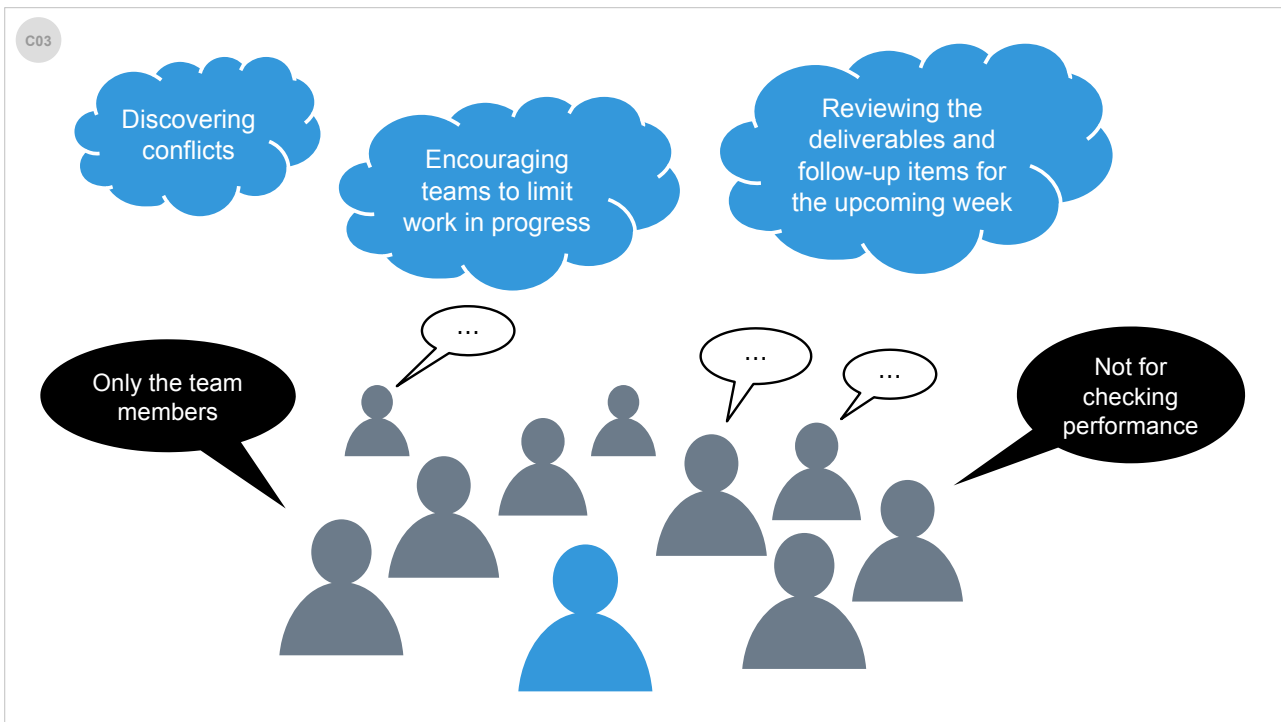


Discovering conflicts

Encouraging teams to limit work in progress

Reviewing the deliverables and follow-up items for the upcoming week





We do have plans, and dependencies are considered in them. Therefore, in an ideal world, we don't expect the planned work of the weeks to have any conflicts. However, in reality, there's always such a risk, and this kick off meeting is an excellent way of discovering those conflicts and doing something about them.

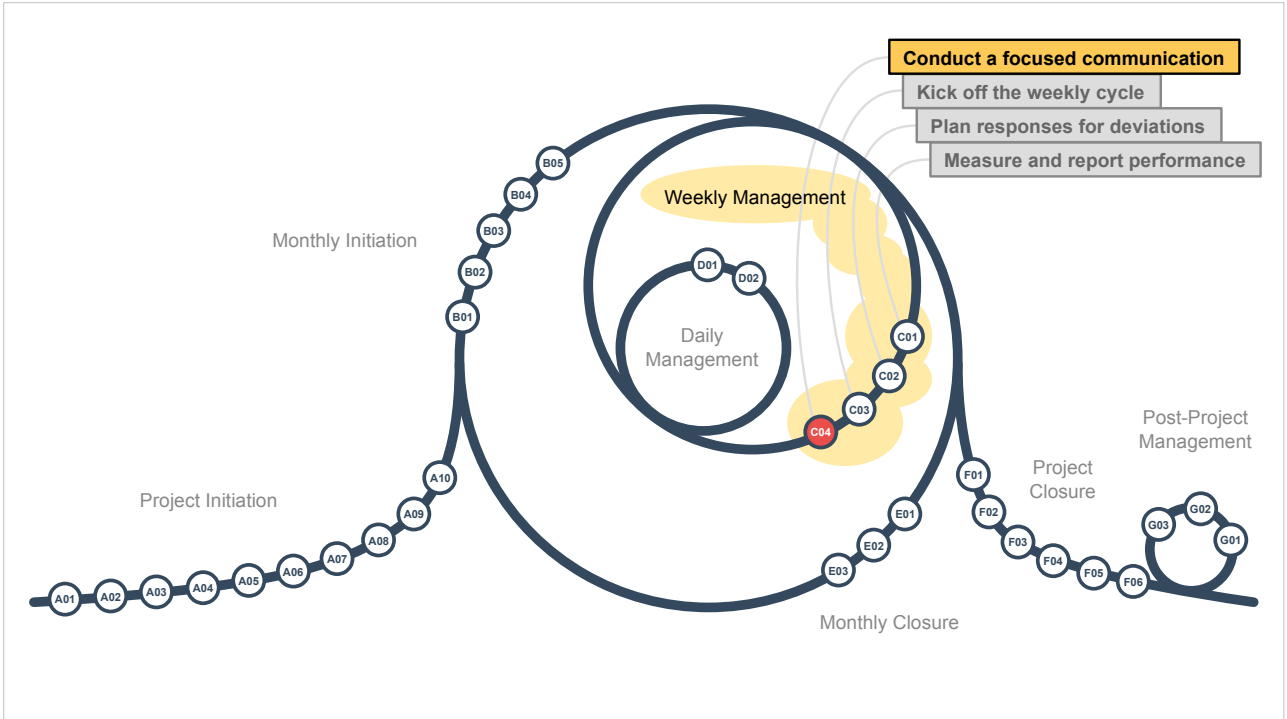
It's essential to focus on the purpose and not discuss other things, such as performance.

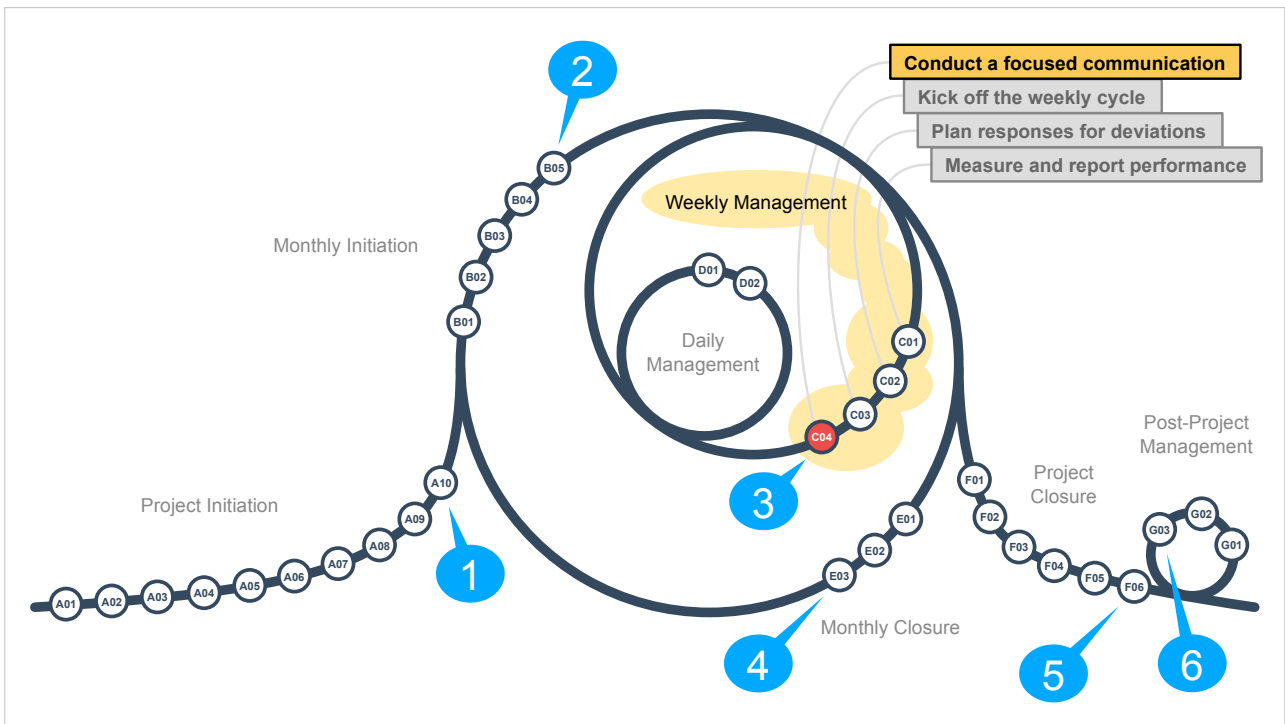
How would you create an effective and pleasant weekly kick-off?



For example:

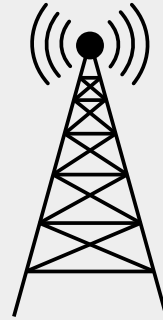
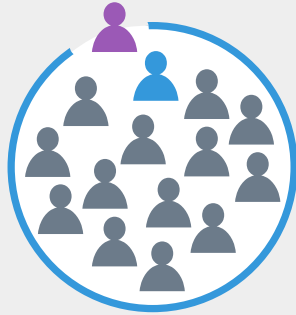
- The project manager can arrange a breakfast every Monday morning, where all team members get together, enjoy their breakfast, and with facilitation from the project manager, review the work of the upcoming week.
- The project manager can arrange for key team members to go out for drinks and a game at the end of each working week, enjoy themselves, and with facilitation from the project manager, review the work of the upcoming week.

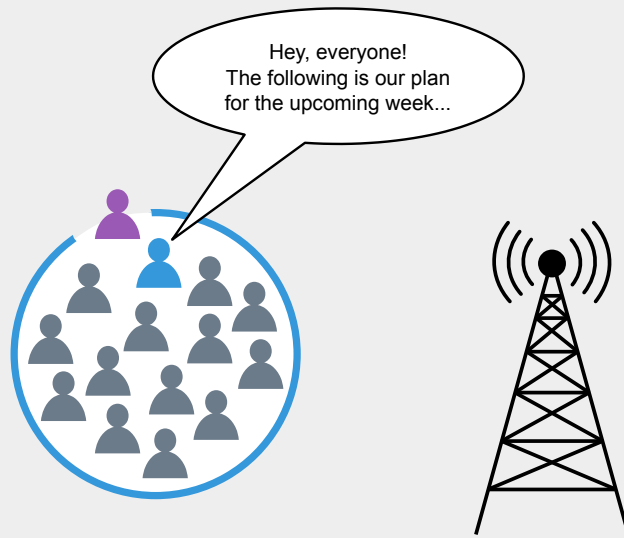


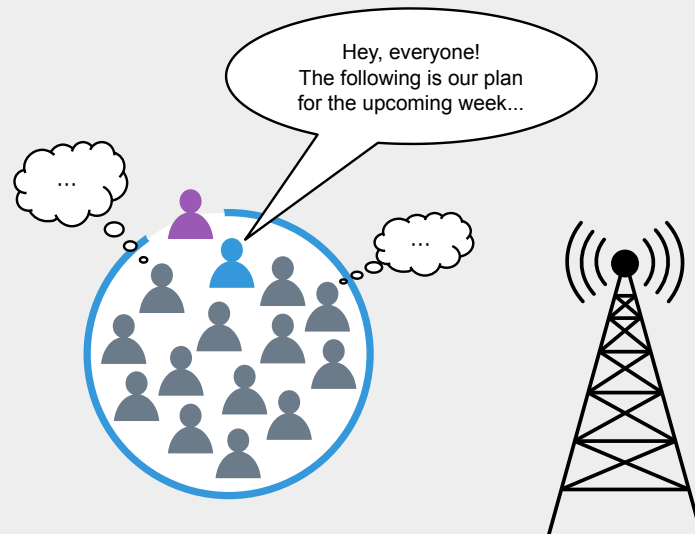


This focused communication is more frequent than others and, therefore, should be kept simpler and shorter; i.e., we don't want to spam team members!

As always, keep the language clear and avoid corporate talk.

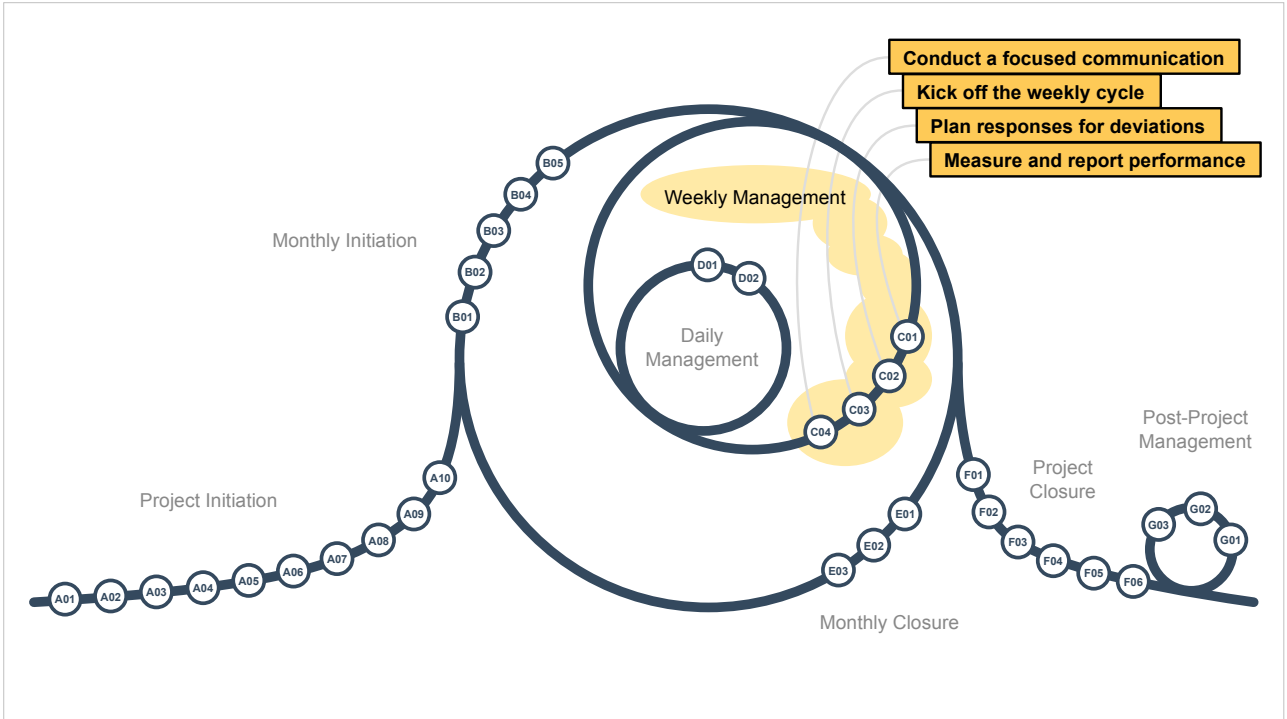






The goal of this activity is not entirely different from the kick off, but we have this one as well because

- the kick off meeting may be limited to key team members for practical purposes, whereas every team member is included here, and
- spoken and written communication have different effects, and combining the two, like what these two activities do, will cover various needs and audiences.



① High-level overview

② Full review

- Ⓐ Project Initiation
- Ⓑ Monthly Initiation
- Ⓒ Weekly Management
- Ⓓ Daily Management
- Ⓔ Monthly Closure
- Ⓕ Project Closure
- Ⓖ Post-Project Management

③ NUPP

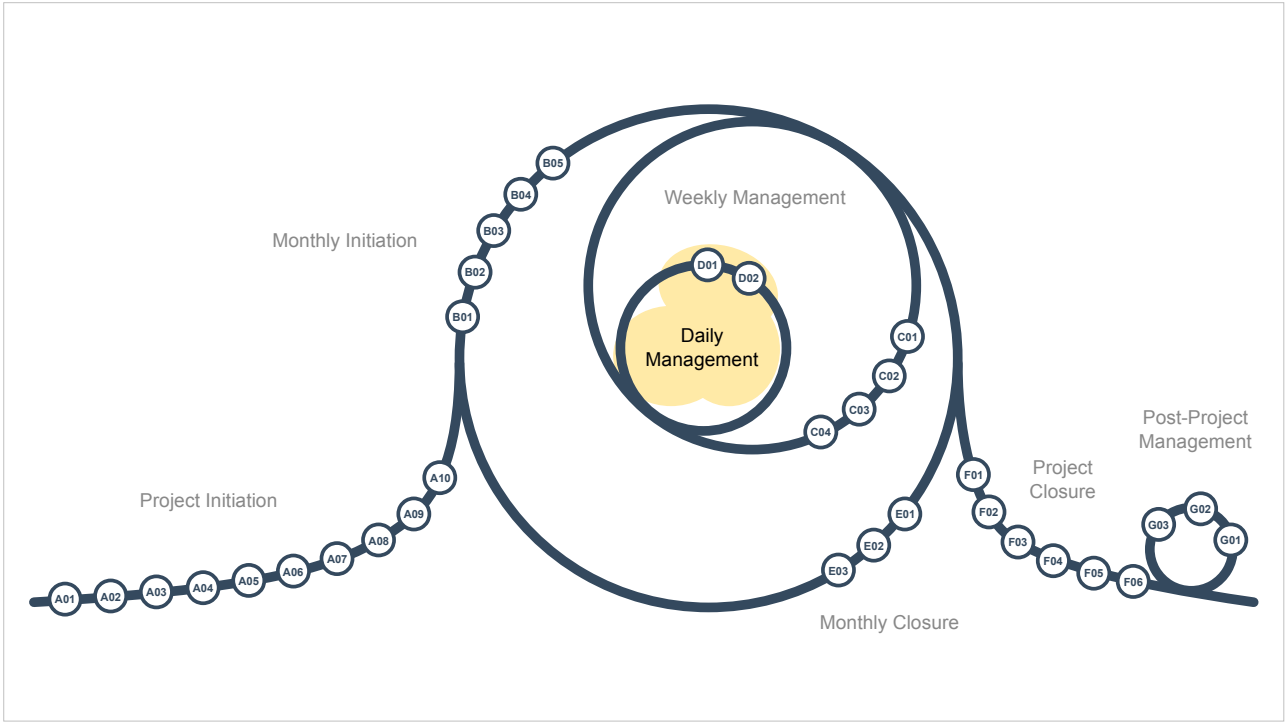
④ Tailoring

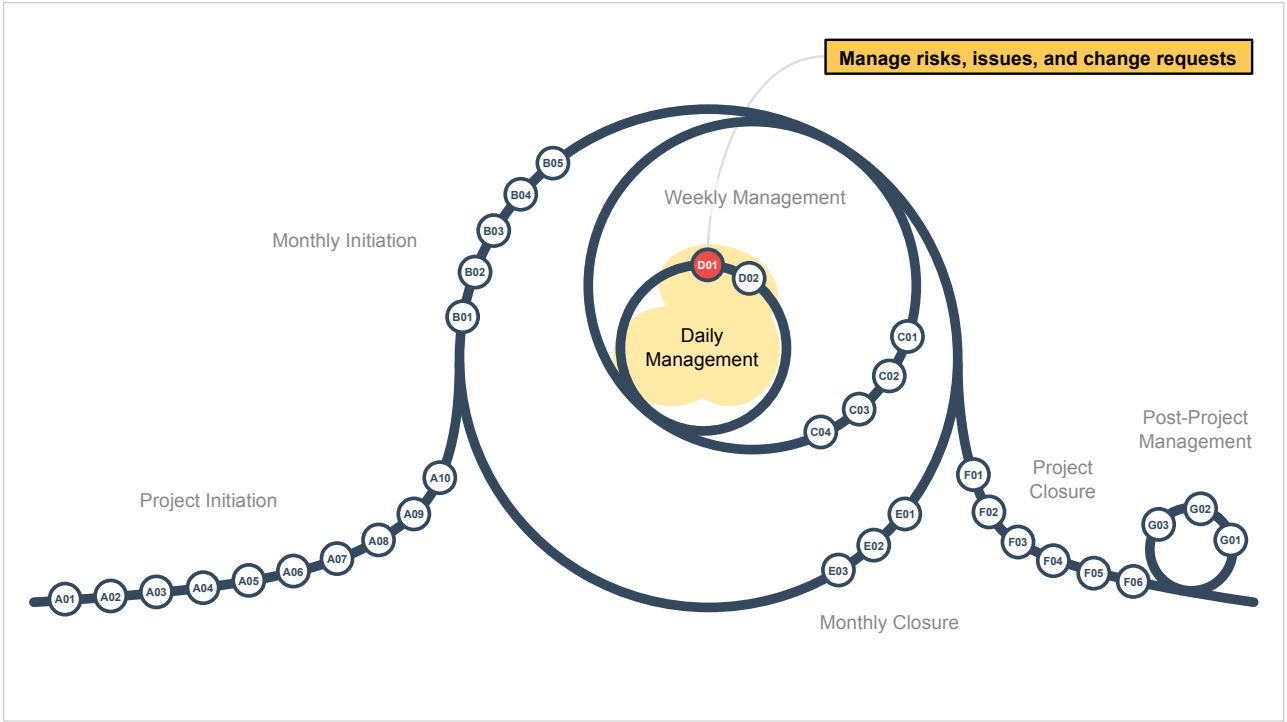
⑤ Development methods

⑥ Code of conduct

⑦ Certification program





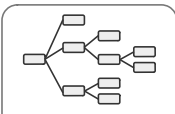


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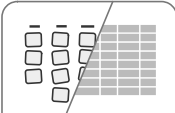
Project Description

2



Deliverables Map

3



Follow-Up Register

4

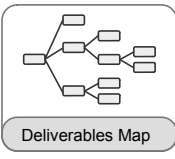


Health Register

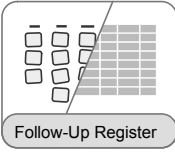
1



2



3



4

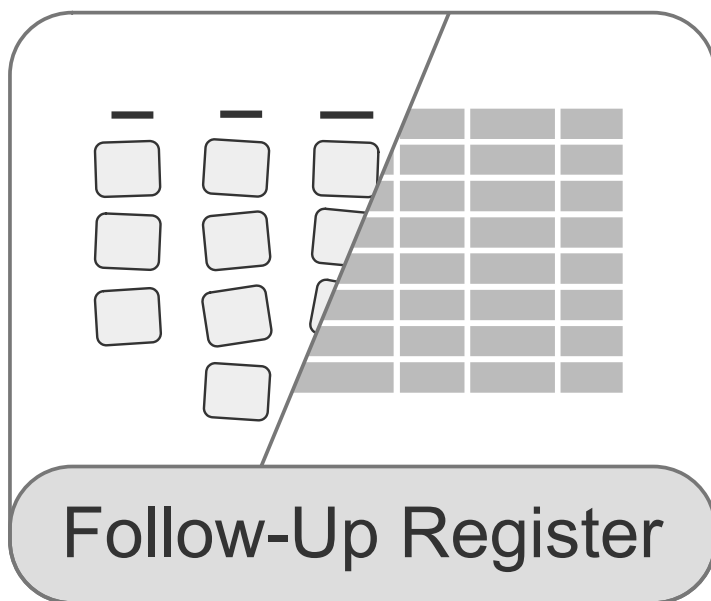


Follow-up items

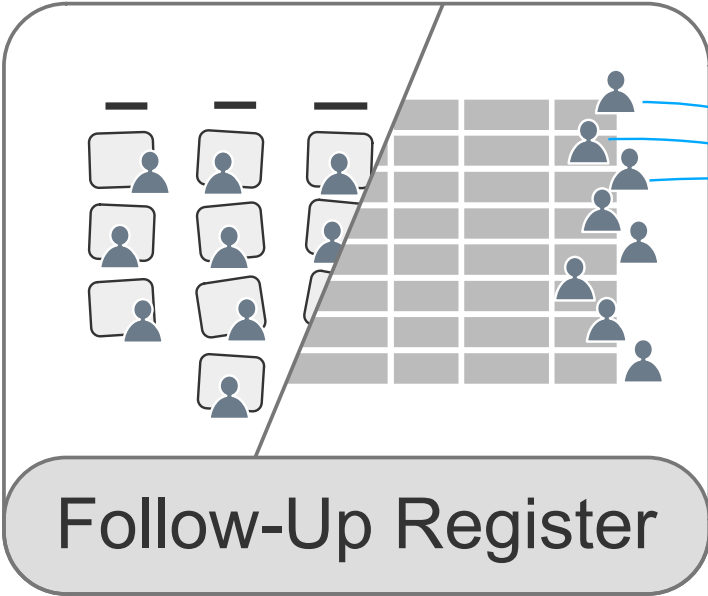
- Issue
- Risk
- Improvement Plan
- Change Request
- Lesson Learned

This is a reminder of what a follow-up item is.

Note: A single item can morph from one of these forms to another as time passes.



The follow-up register can be on a [Kanban] board, in a spreadsheet, etc.



Custodians

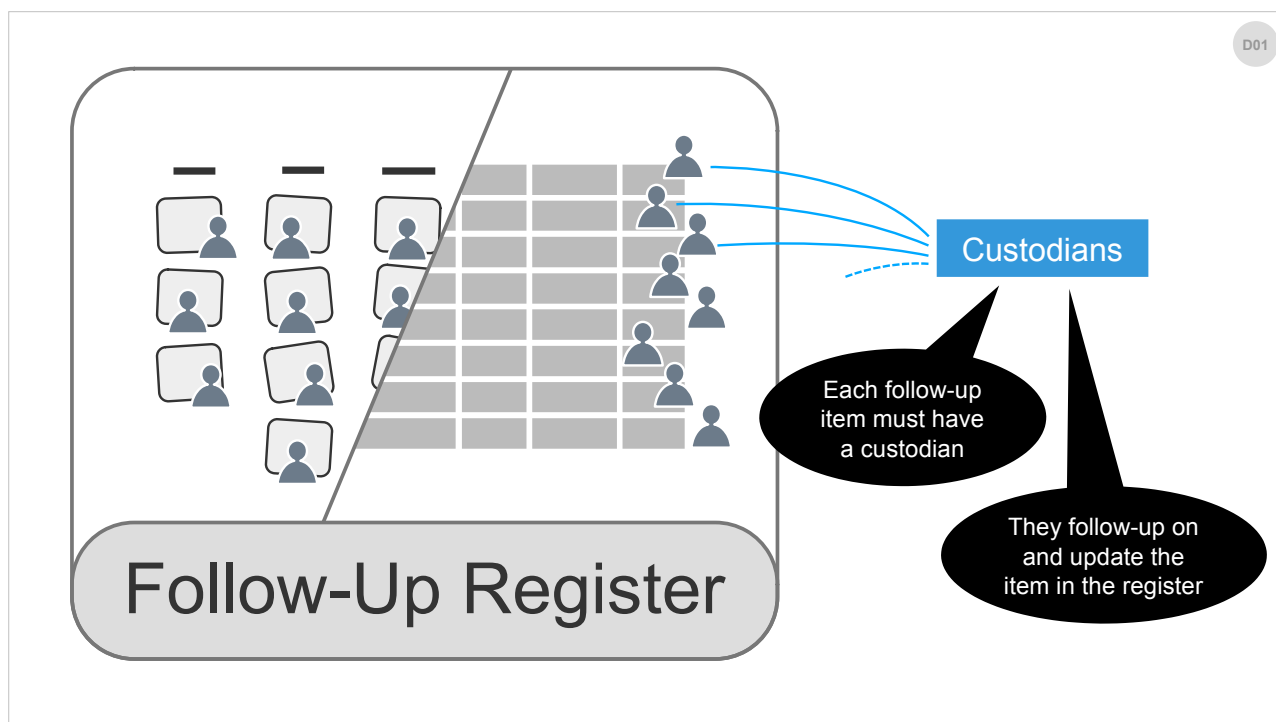
Follow-Up Register



Custodians

Each follow-up item must have a custodian

Follow-Up Register



What many resources refer to as a “risk owner” is the same as the custodian concept in P3.express. However, we have custodians for all follow-up items, as well as all deliverables.

The custodian may not be responsible for the actions or tasks underneath a follow-up item or deliverable but only for following up on them and reporting back.

When there’s a single person responsible for the actions, the same person may also be appointed as its custodian. When multiple people are responsible for the actions, one may be selected as the custodian (there’s one and only one custodian per item). However, a person other than those responsible for the actions may also be appointed as the custodian.

Custodians are all team members. So, if the actions are external (e.g., a permit to be issued by the City Hall), the custodian is still one of the team members.

Do we need to assign custodians to follow-up items that are low in the list and won't have any actions soon?



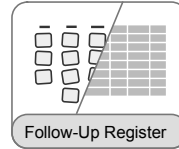
Yes, because we may think there's nothing we should do about them in the next few months, but something can change in the environment and change their priority or require immediate actions for them. When these items have custodians, we'd have another layer of protection because the custodian will pay close attention to them.

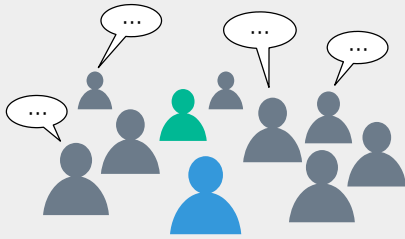
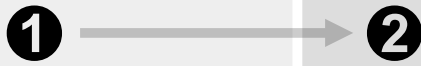
It doesn't mean that others have nothing to do with items that are not in their custody.

1



Identify and plan a new follow-up item and add it to the register
(conversations, focused workshops, etc.)





Identify and plan a new follow-up item and add it to the register
(conversations, focused workshops, etc.)



Assign one team member as its custodian



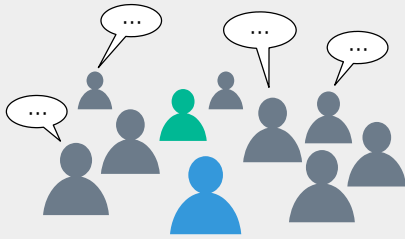
Identify and plan a new follow-up item and add it to the register
(conversations, focused workshops, etc.)



Assign one team member as its custodian



The custodian follows up on the item...



Identify and plan a new follow-up item and add it to the register (conversations, focused workshops, etc.)



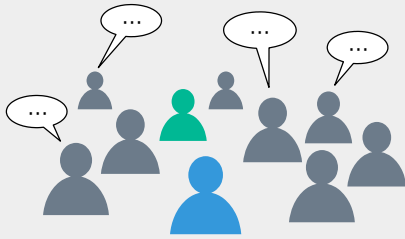
Assign one team member as its custodian



The custodian follows up on the item...



... until it's closed



1 Identify and plan a new follow-up item and add it to the register (conversations, focused workshops, etc.)

2 Multiple people may work on the item



2 Assign one team member as its custodian

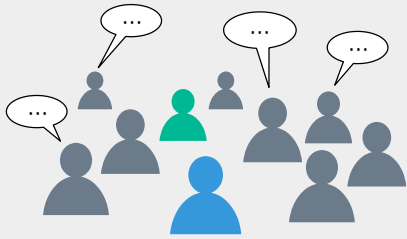


3 The custodian follows up on the item...



4 ... until it's closed

1



Identify and plan a new follow-up item and add it to the register
(conversations, focused workshops, etc.)

2

Multiple people may work on the item



Assign one team member as its custodian

3



The custodian on the

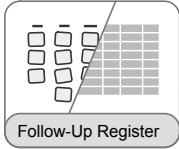
Project manager makes sure items are followed up on

4





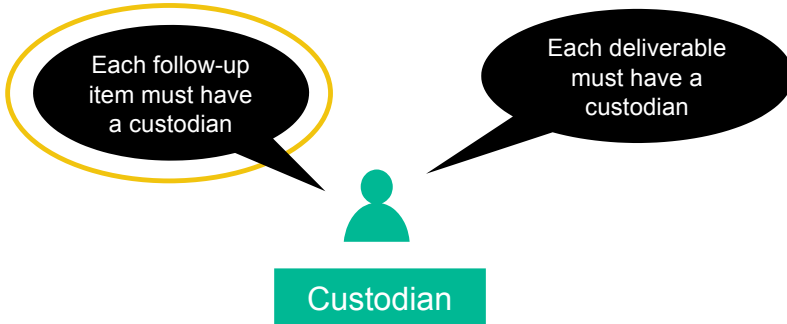
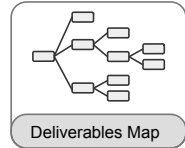
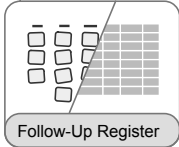
Custodian

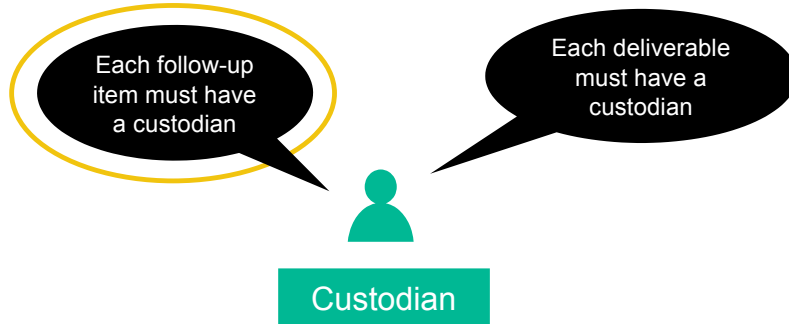
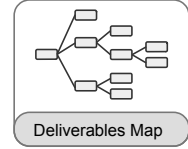
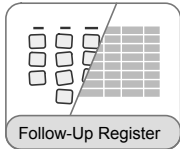


Each follow-up item must have a custodian



Custodian





Involve as many of the team members as possible as custodians.

D01

Suppose only the project manager and one or two other team members become custodians for all items. In that case, it won't be as effective as involving a large number of team members as custodians: It spreads the workload, makes better use of the attention and knowledge of people, and creates a more diverse sense of contribution for team members.

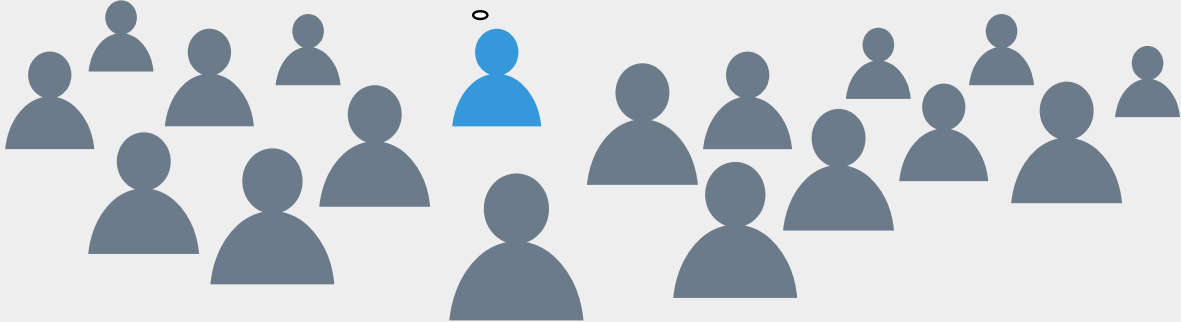


D01

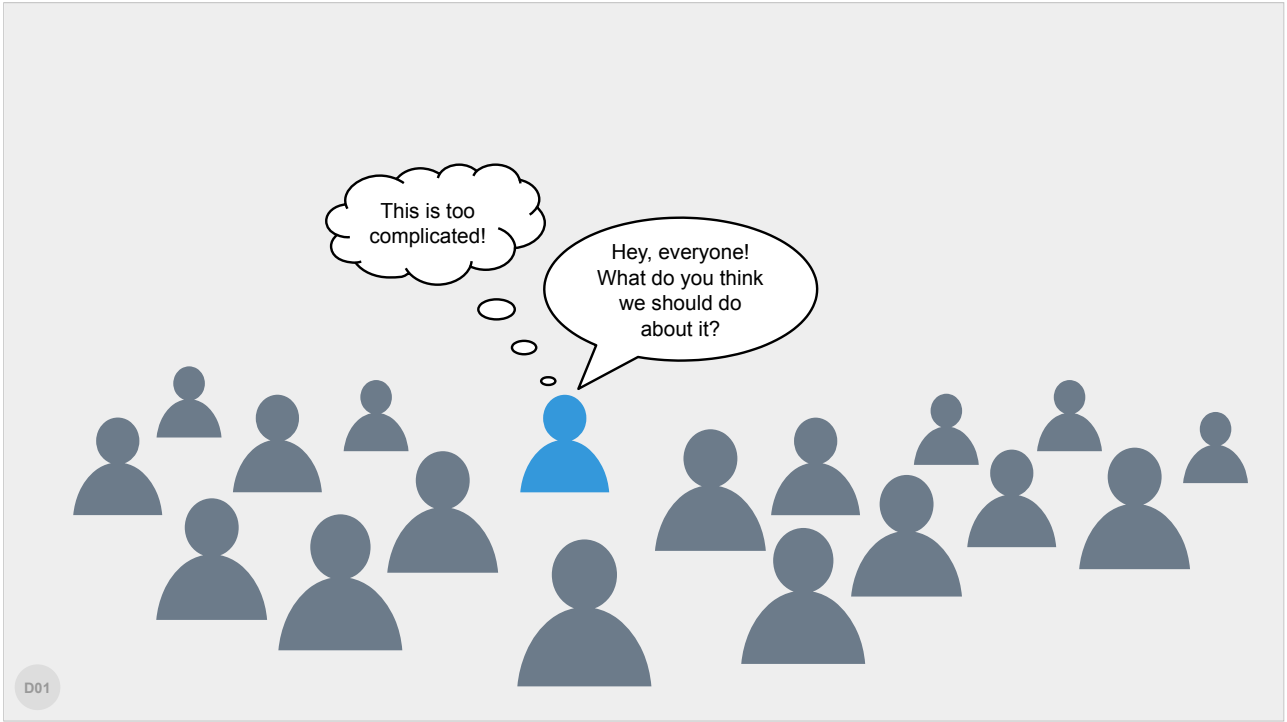
This is too complicated!



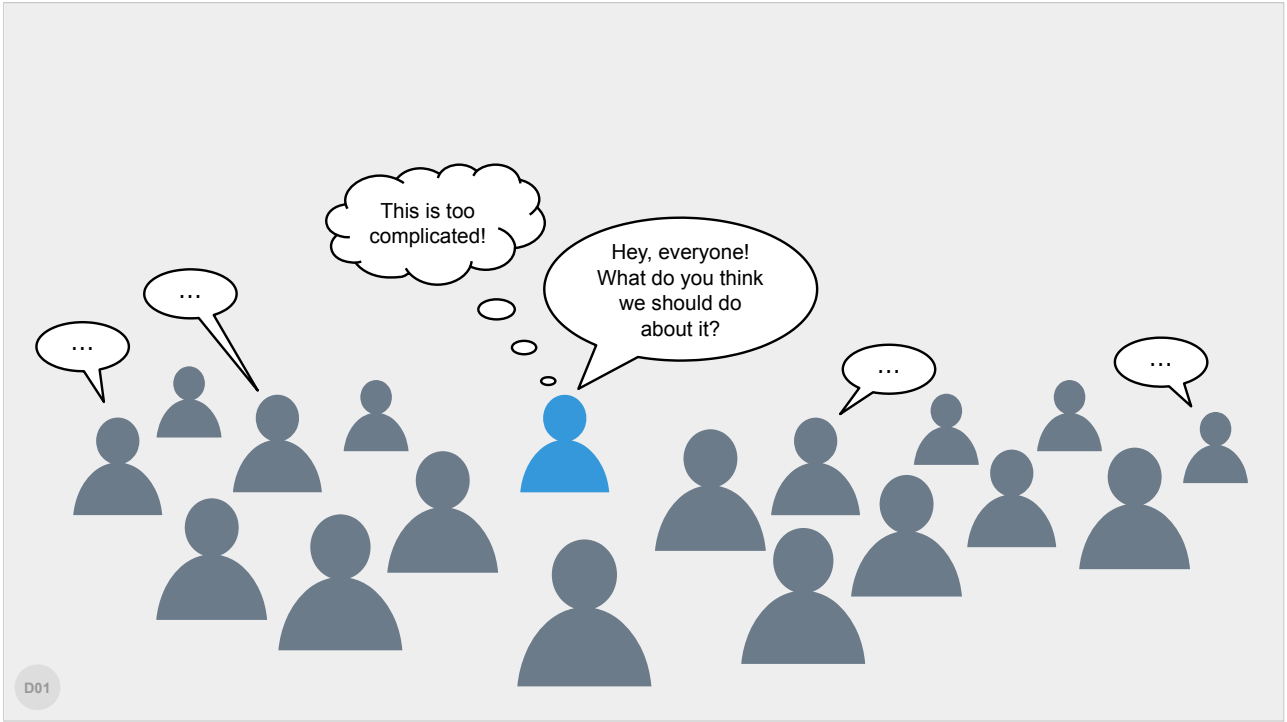
This is too complicated!



D01

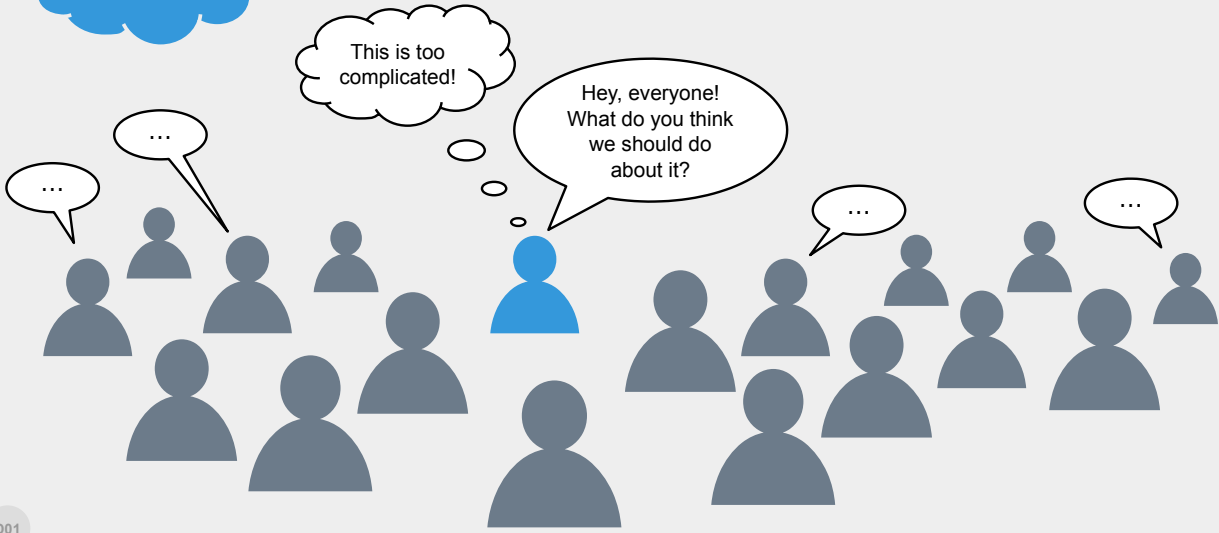


D01



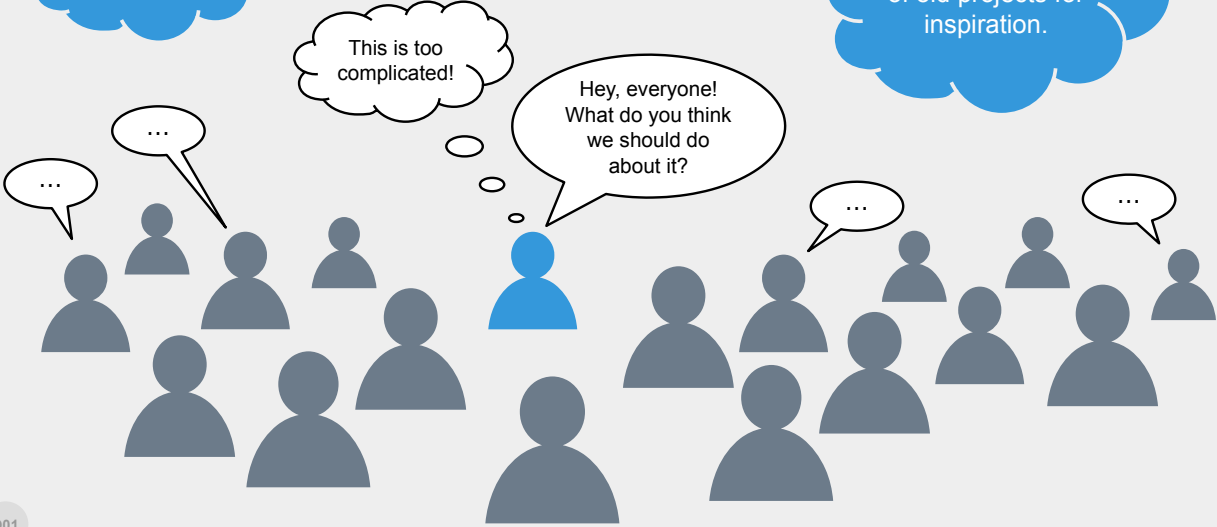
D01

Wisdom of Crowds



Wisdom of Crowds

Check archives of old projects for inspiration.

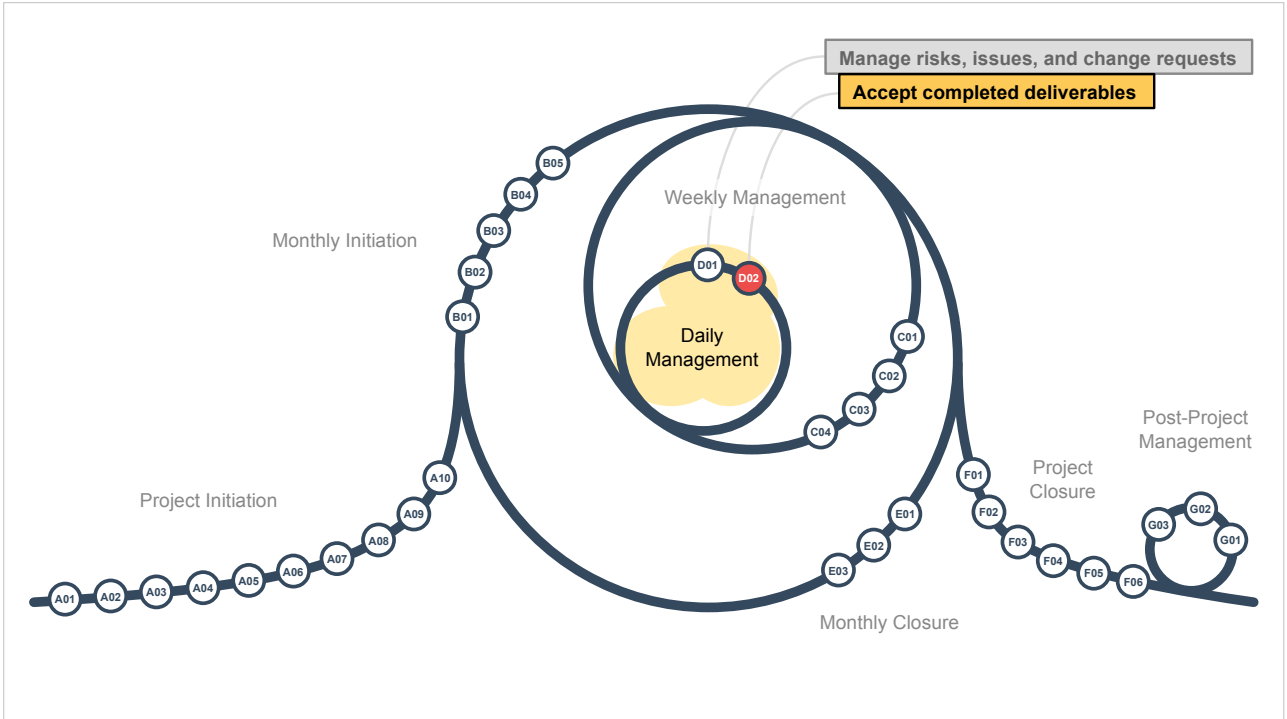


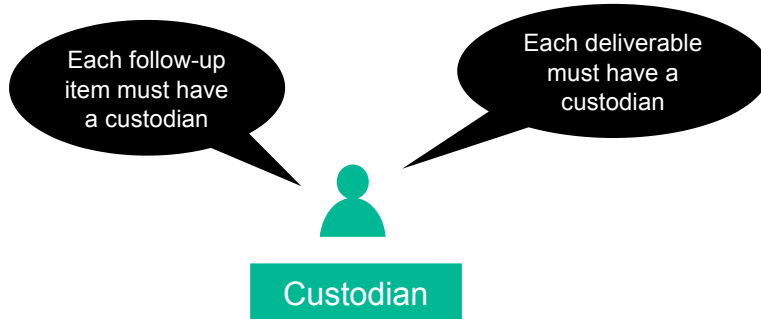
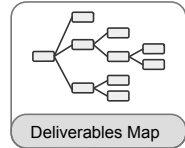
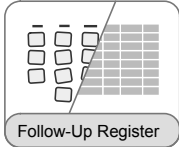
What's the first thing we should do after identifying a new follow-up item?



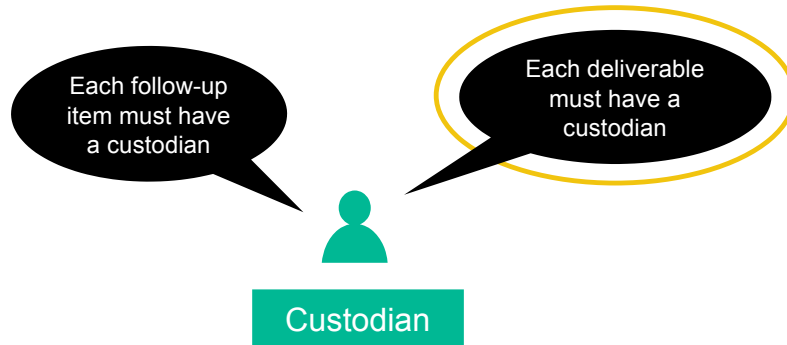
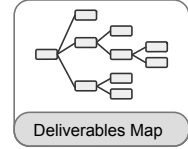
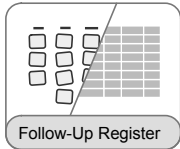
The first thing is to record it in the follow-up register.

What if a follow-up item can be taken care of and closed in a few minutes? We still record it first because this way, we would have a complete history of the project, which will be helpful later in the project and in other projects.



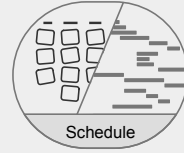


Involve as many of the team members as possible as custodians.

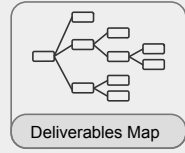


Involve as many of the team members as possible as custodians.

We discussed the necessity of having custodians for follow-up items in the previous activity. This activity is about deliverables, and it's important to remember that every deliverable should also have a custodian.



Schedule



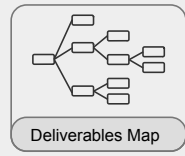
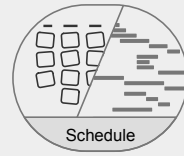
Deliverables Map



Custodian



Project manager



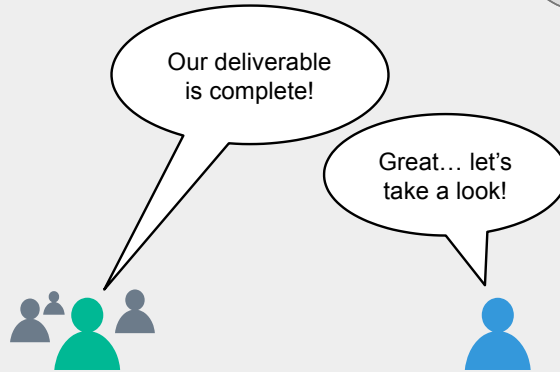
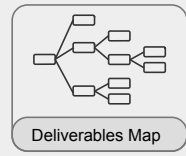
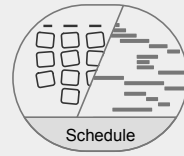
Our deliverable is complete!



Custodian

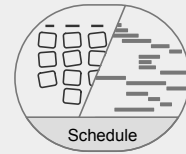


Project manager

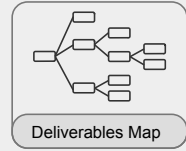


Custodian

Project manager



Schedule



Deliverables Map

Everything seems fine. Let's mark it as "closed".



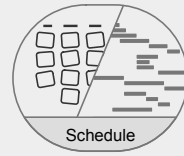
Custodian



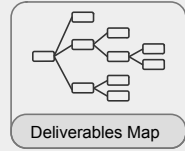
Project manager

Verifying deliverables has a technical aspect, but the project manager doesn't have to be technical. However, the project manager doesn't use personal judgment but uses the information already captured for the deliverable to ensure nothing is missing. They can converse with the custodian and people responsible for developing the deliverable (similar to what we do in project management peer reviews) and help them double-check everything. This must be done as a helpful service to those people.

In some cases, the project manager can facilitate a group of people to review the completed deliverables and close them.



Schedule



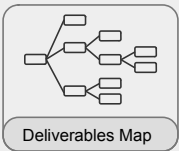
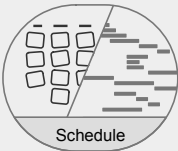
Deliverables Map



Project manager

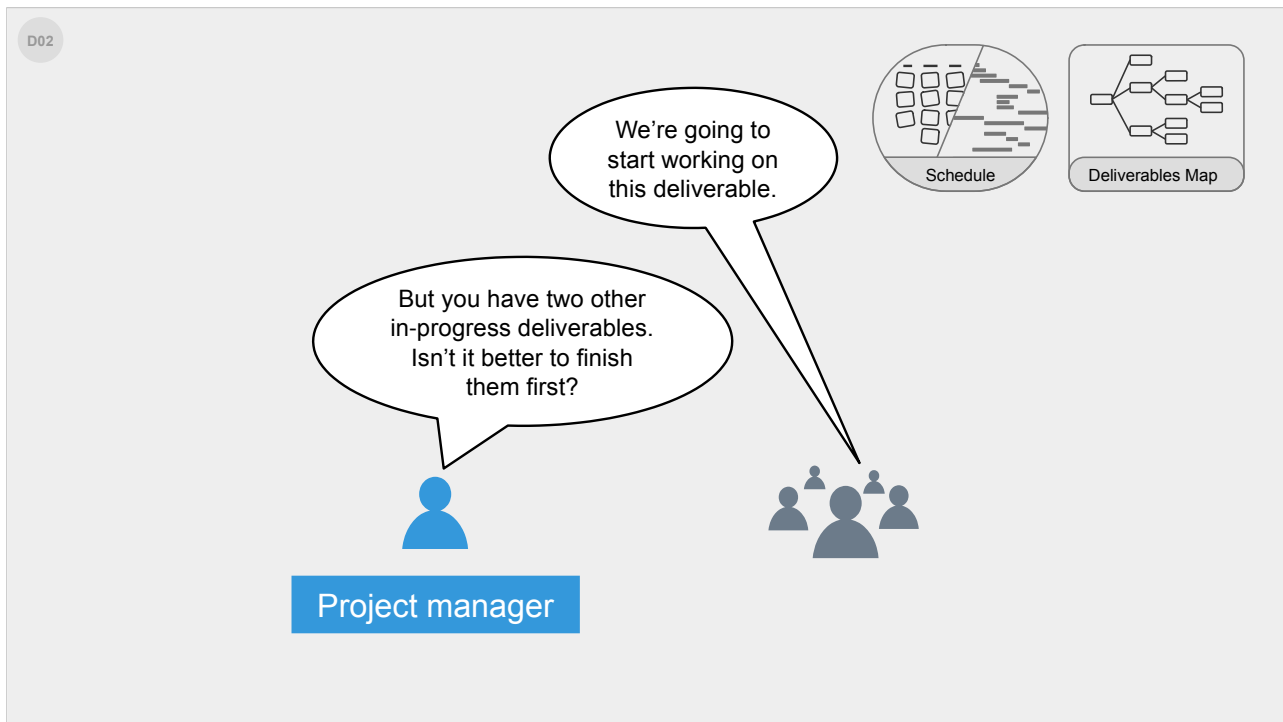


We're going to start working on this deliverable.



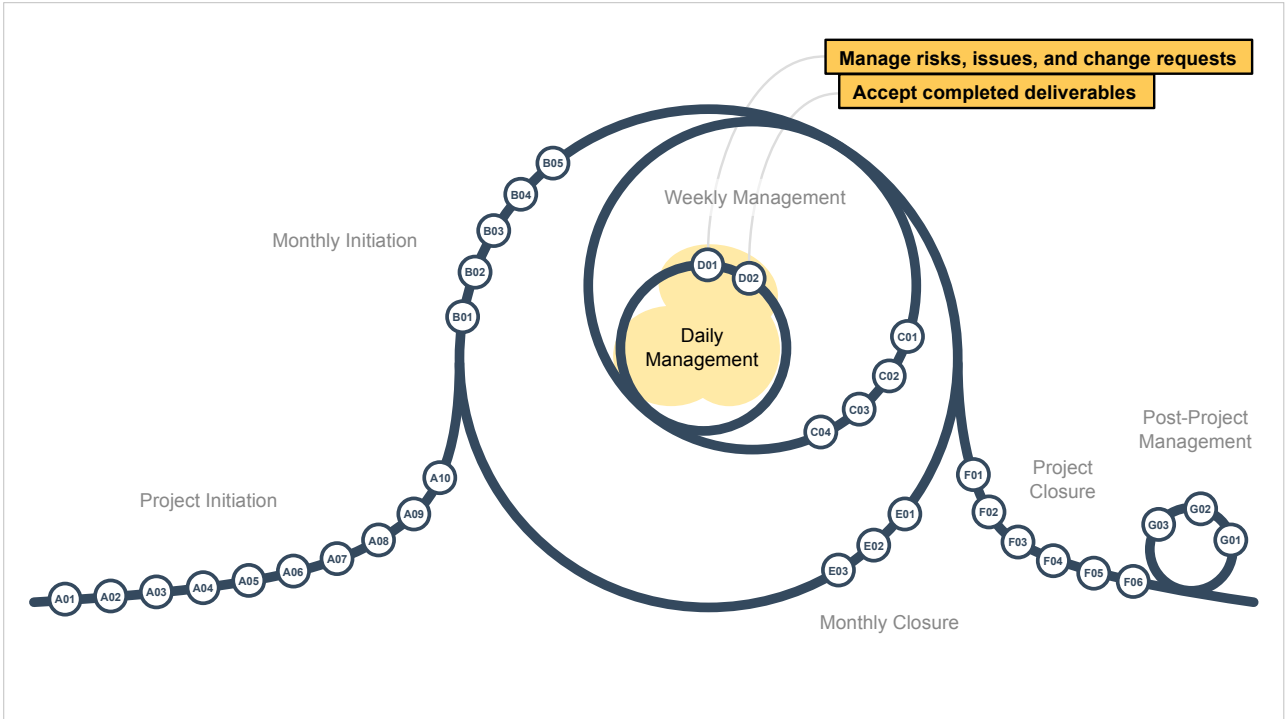
Project manager





Reminder: Doing everything sequentially in a real-world project is unrealistic, and parallel work is almost necessary. However, the optimum amount of parallel work is almost always lower than what people consider in projects, so the project manager should be careful with it. Too much parallel work is unproductive and makes the project less predictive (too costly, too long, and too risky).

A typical case in many projects is when a team runs into difficulty with a deliverable; they simply move to another deliverable and leave the first one on hold. This is an example of a bad idea that should be avoided unless we have a good reason to wait before proceeding with a specific deliverable.



① High-level overview

② Full review

- Ⓐ Project Initiation
- Ⓑ Monthly Initiation
- Ⓒ Weekly Management
- Ⓓ Daily Management
- Ⓔ Monthly Closure
- Ⓕ Project Closure
- Ⓖ Post-Project Management

③ NUPP

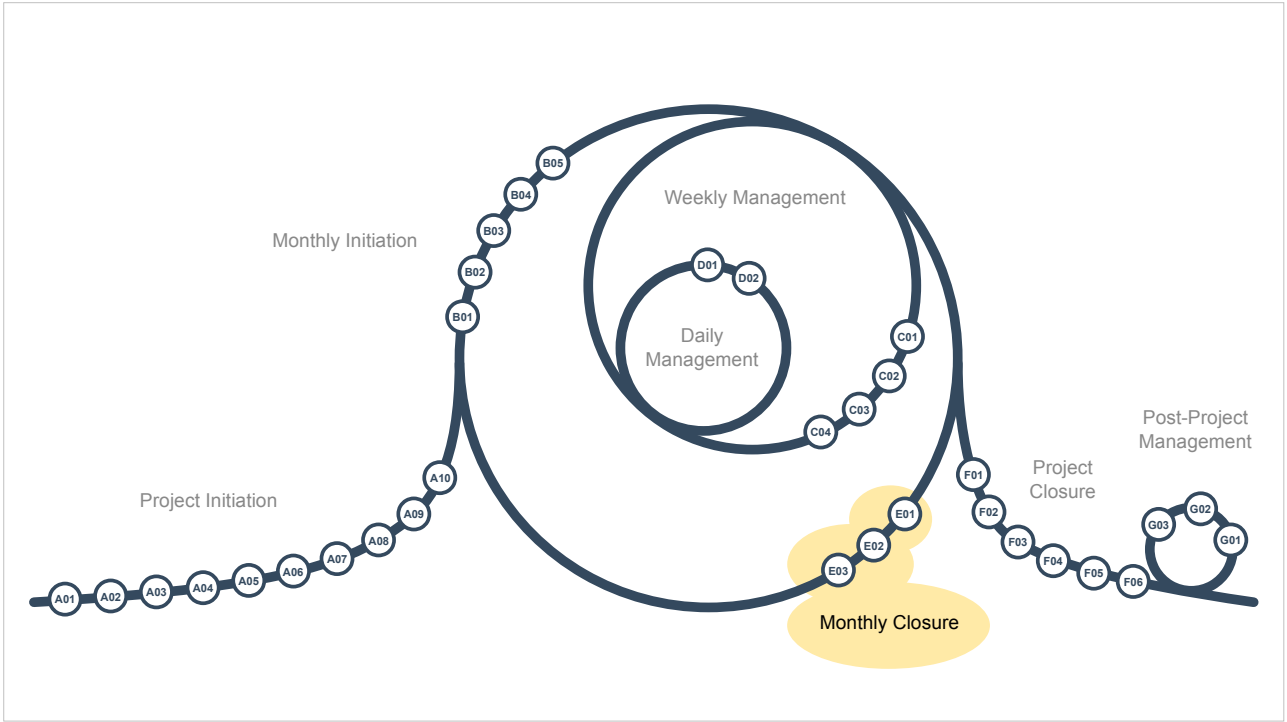
④ Tailoring

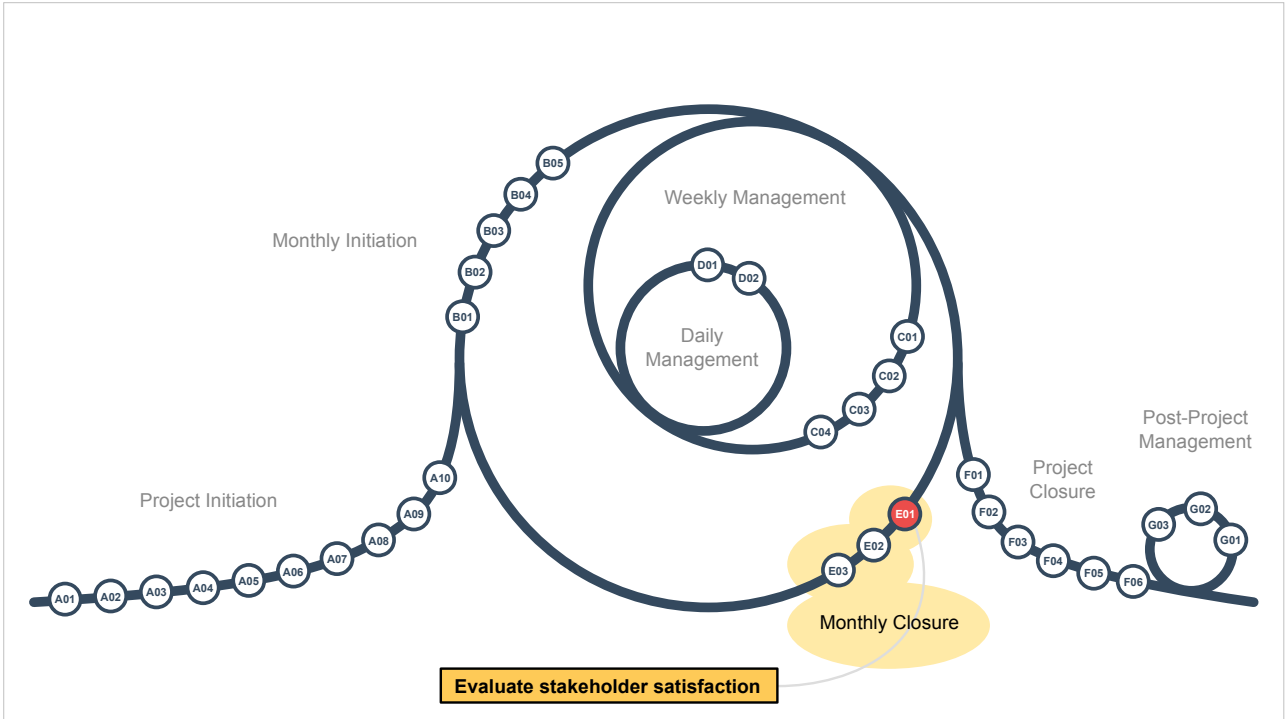
⑤ Development methods

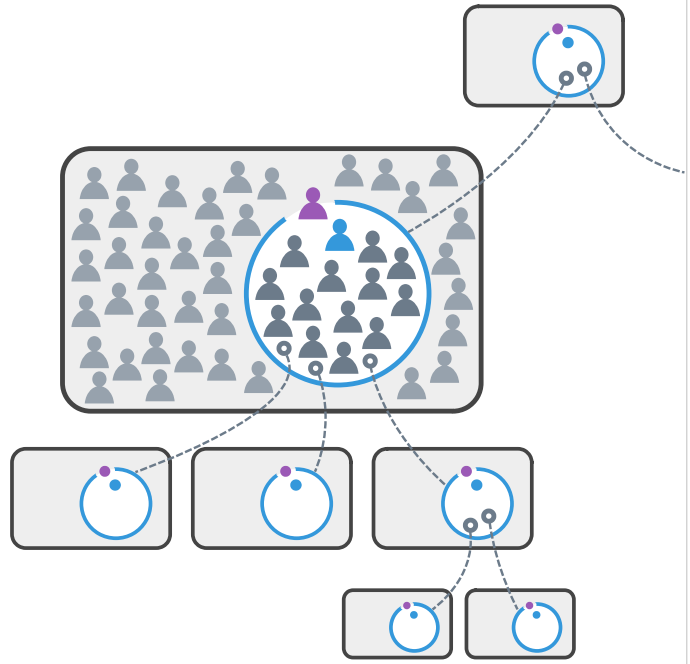
⑥ Code of conduct

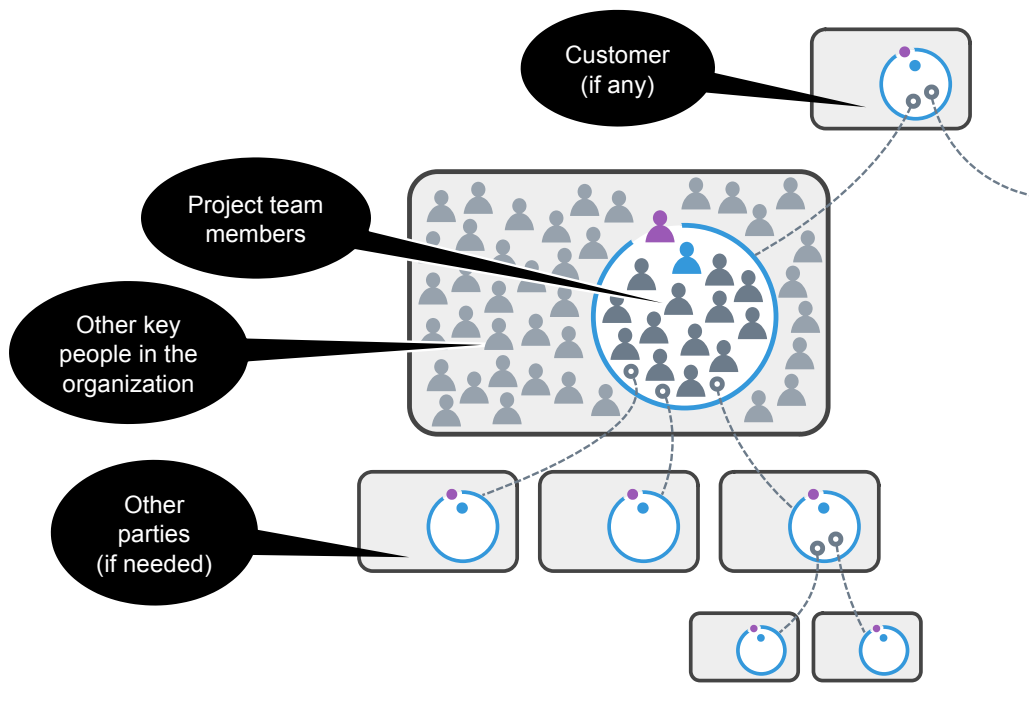
⑦ Certification program



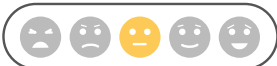
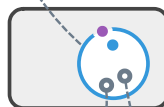
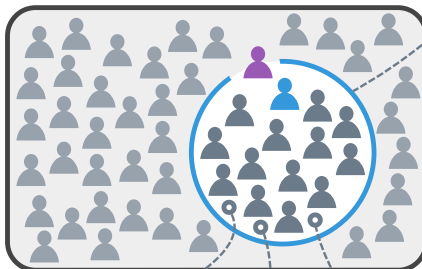


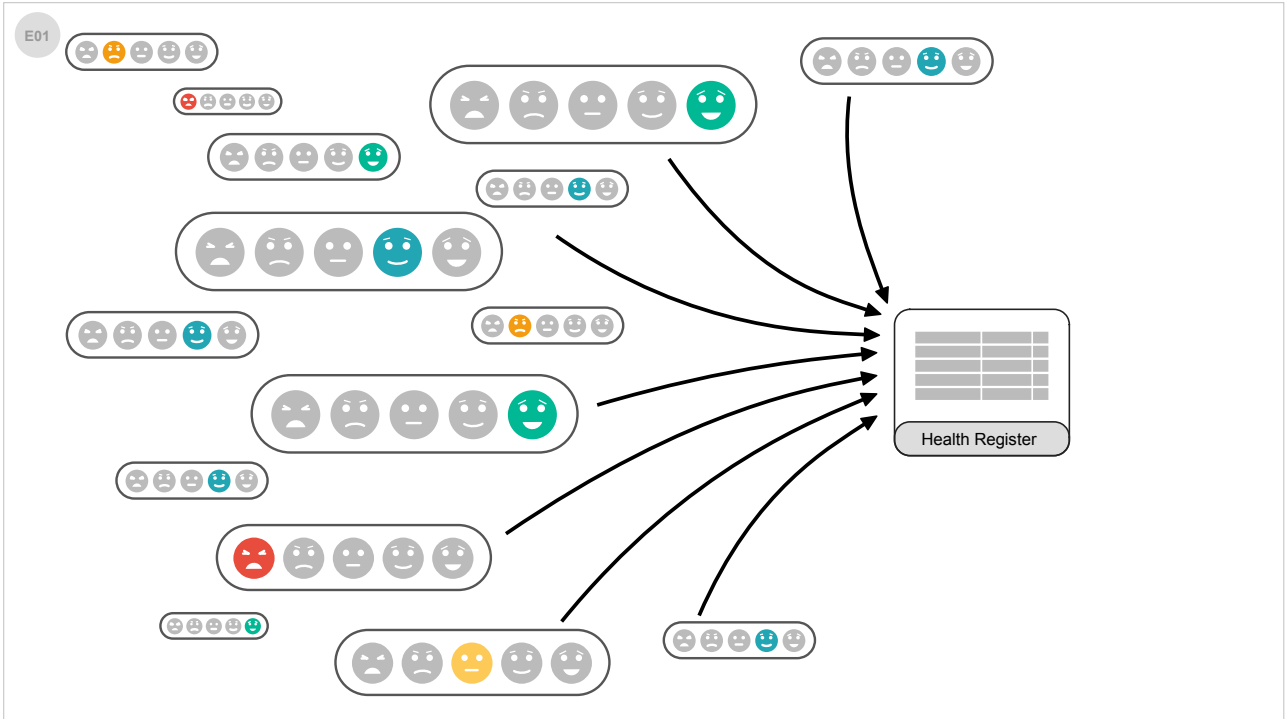


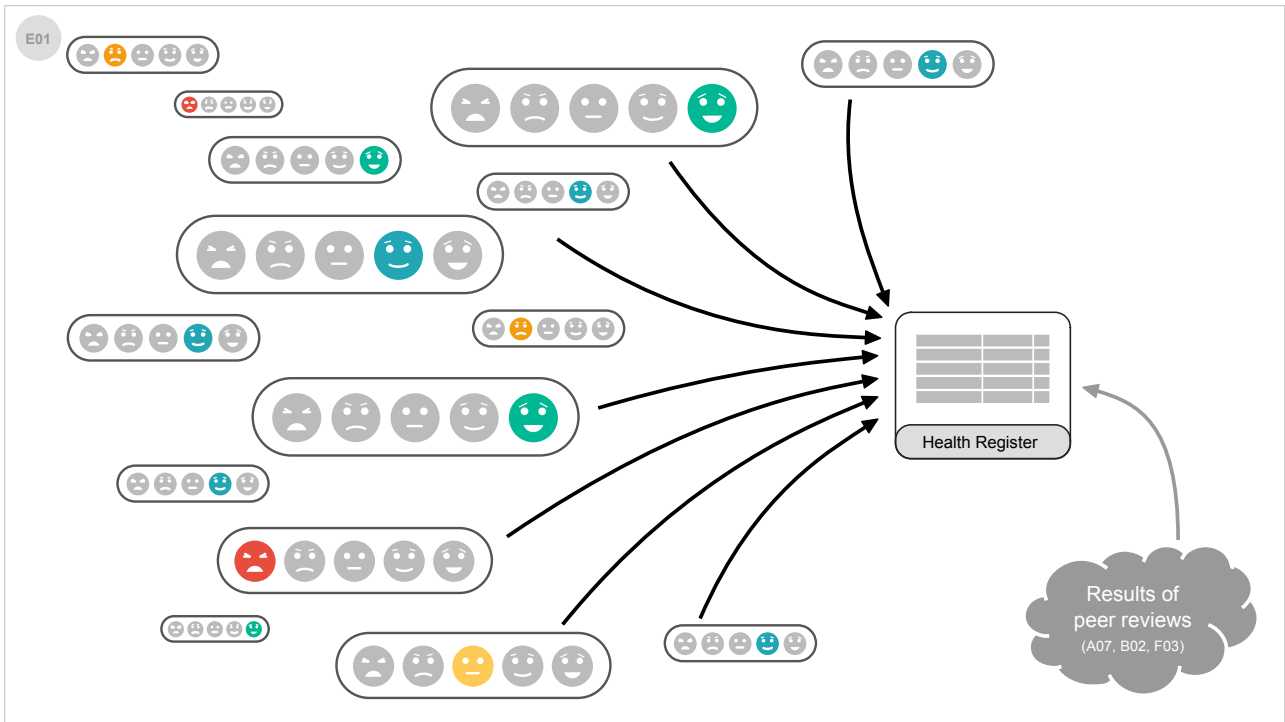




E01





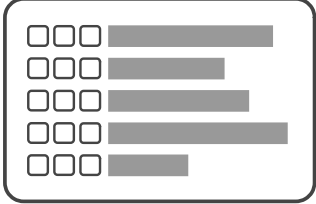


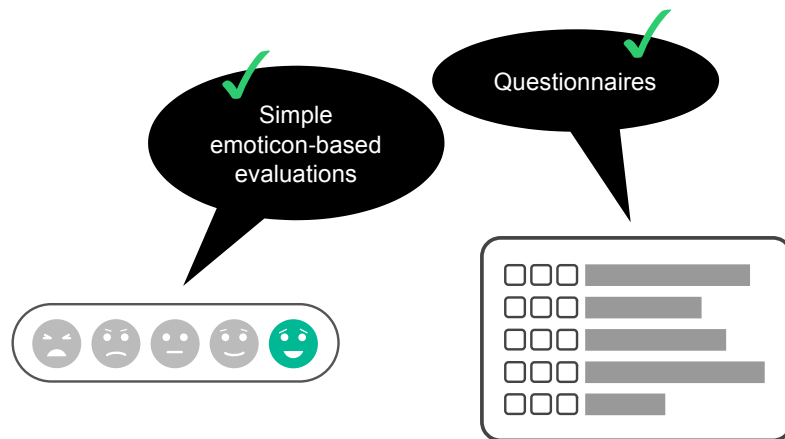
The bubble on the right is a reminder that the Health Register is used to record two types of information: satisfaction evaluation and peer review. The latter is not our subject in this activity.

Simple
emoticon-based
evaluations



Questionnaires

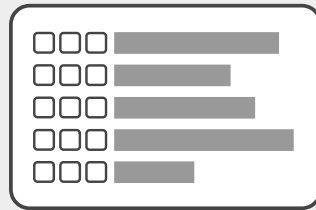




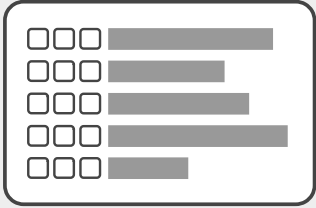
Satisfaction evaluations can have any format; a questionnaire, a simple emoticon-based evaluation, or anything else.

It's essential to tailor it to the audience and not use a complicated one that people won't respond to.

If needed, there can be more than one type of evaluation, e.g., one for the internal team members and one for the customer.



Keep it simple!



Keep it simple!

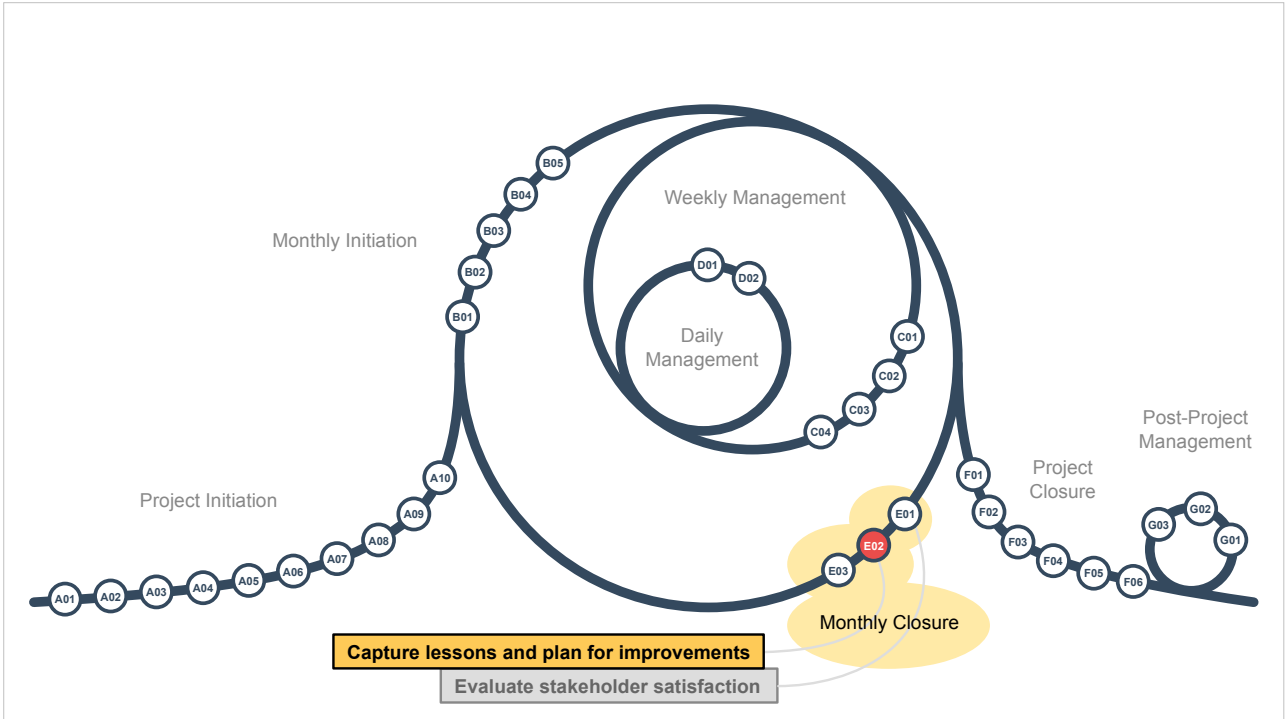
Make it anonymous, if needed.

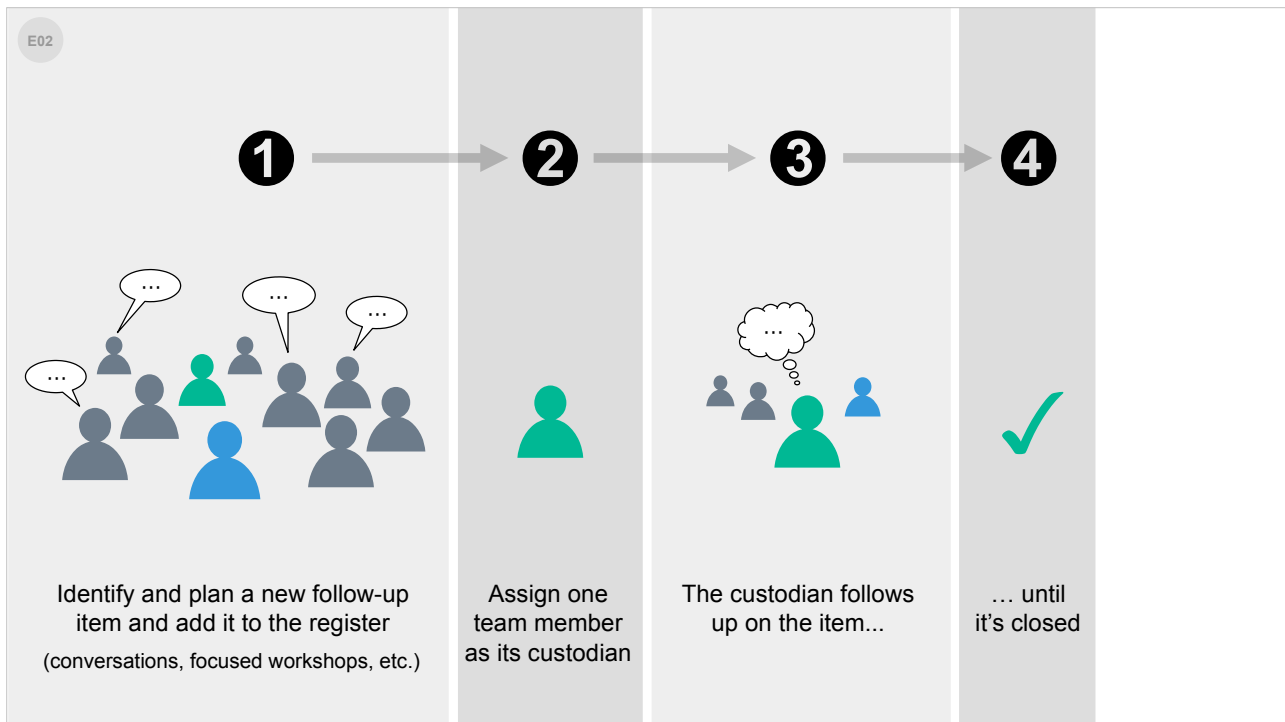


What are the benefits of monthly satisfaction evaluations?



- It helps us discover problems as soon as possible before they pile up and become difficult to solve.
- It shows the stakeholders that we care about their satisfaction and improves our relationship with them.
- Etc.





Let's talk about the lessons learned concept in P3.express before going through the E02 activity.



1 Identify and plan a new follow-up item and add it to the register (conversations, focused workshops, etc.)



2 Assign one team member as its custodian



3 The custodian follows up on the item...

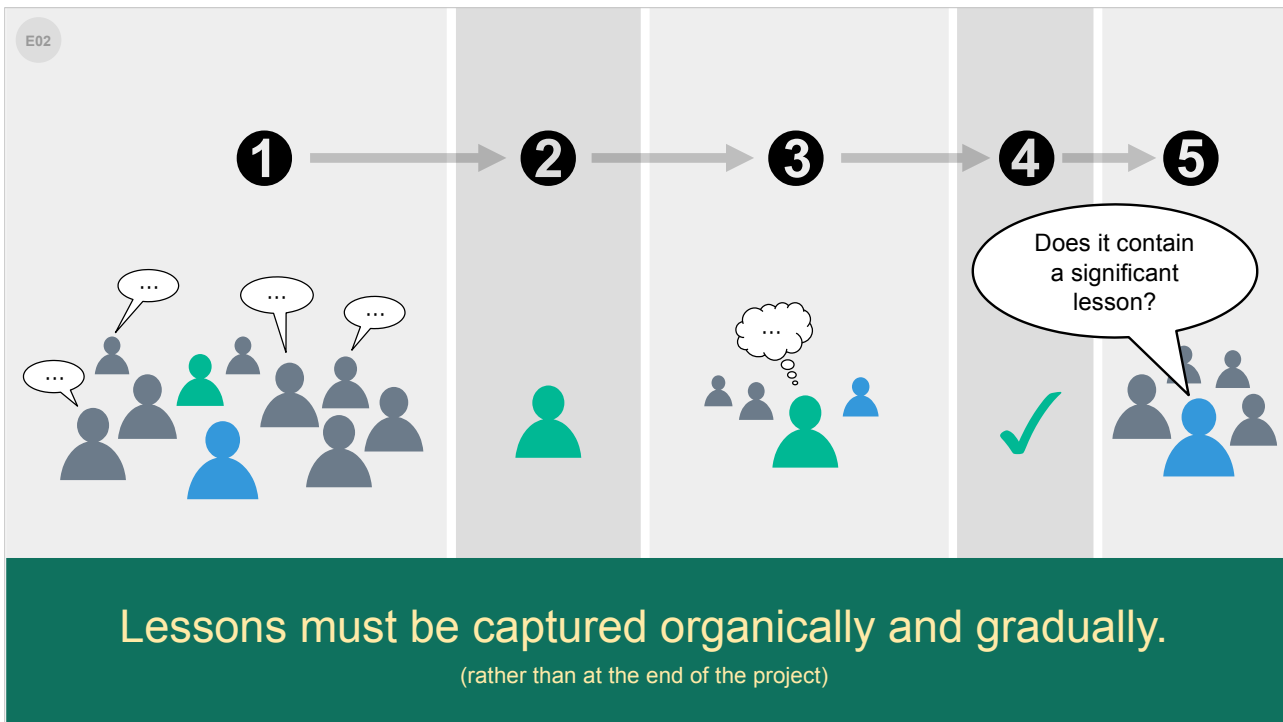
Does it contain a significant lesson?



4 ... until it's closed



5 Mark those containing a significant lesson



Most projects have a workshop at the end to identify and record a few lessons, which is ineffective because we won't remember everything, and it's also an unnecessary extra effort.

Instead, we want the lessons to emerge organically and gradually throughout the project. We have an integrated register for all follow-up items and track them until they are closed. During that, we add related information to those cards to ensure we won't forget them and the follow-ups become easier. When the item is closed, that information will work as a lesson learned, which we consider organic and gradual.

However, only some closed items are important lessons. That's why we have one extra step at the end, when we close the item, to decide whether or not it contains an important lesson and flag it if so.

Now we can proceed and talk about E02.

What's the most important lesson you've learned in your projects in the last three years?

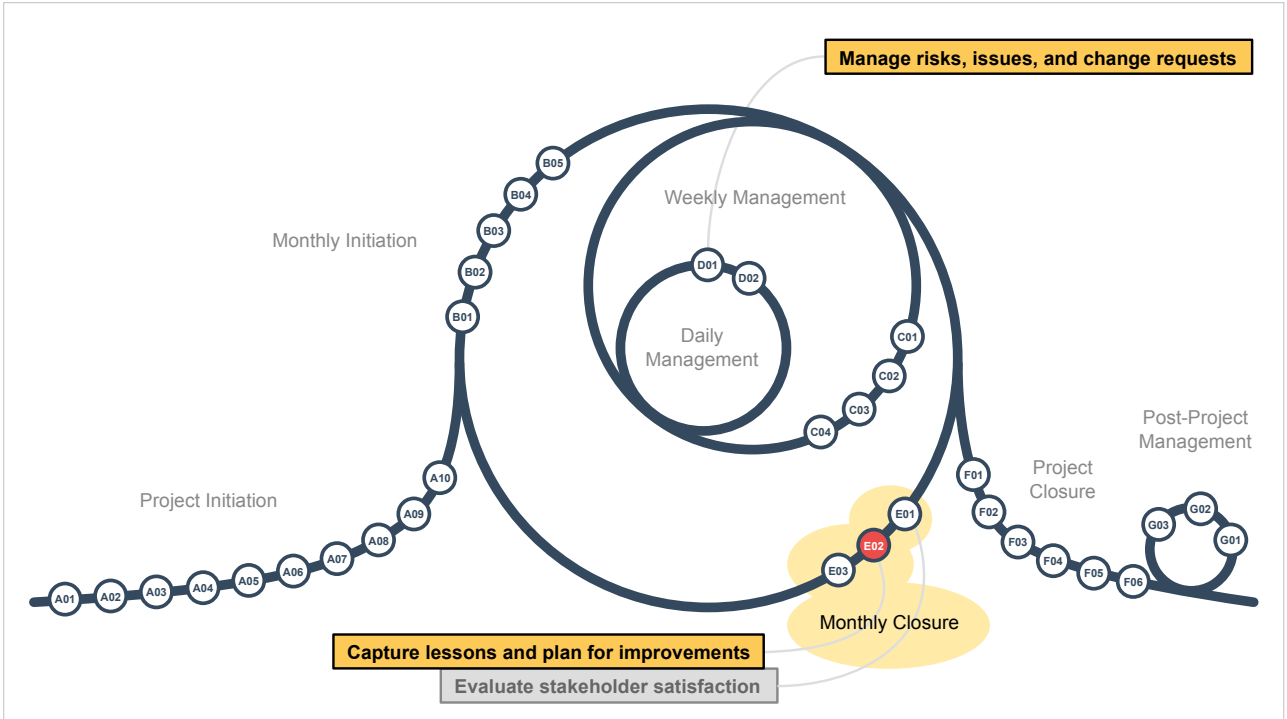


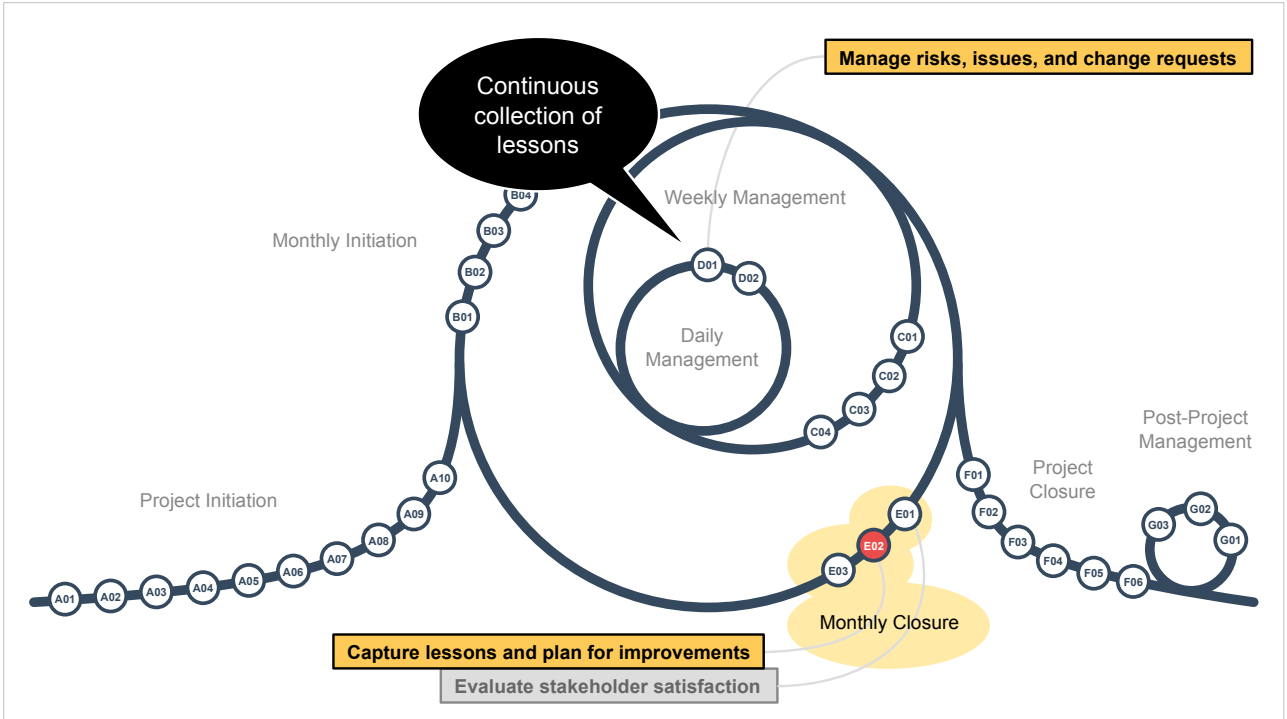
This exercise can work as a short break and an opportunity for the learners to share interesting lessons. It's also an opportunity to think about what can be considered a lesson.

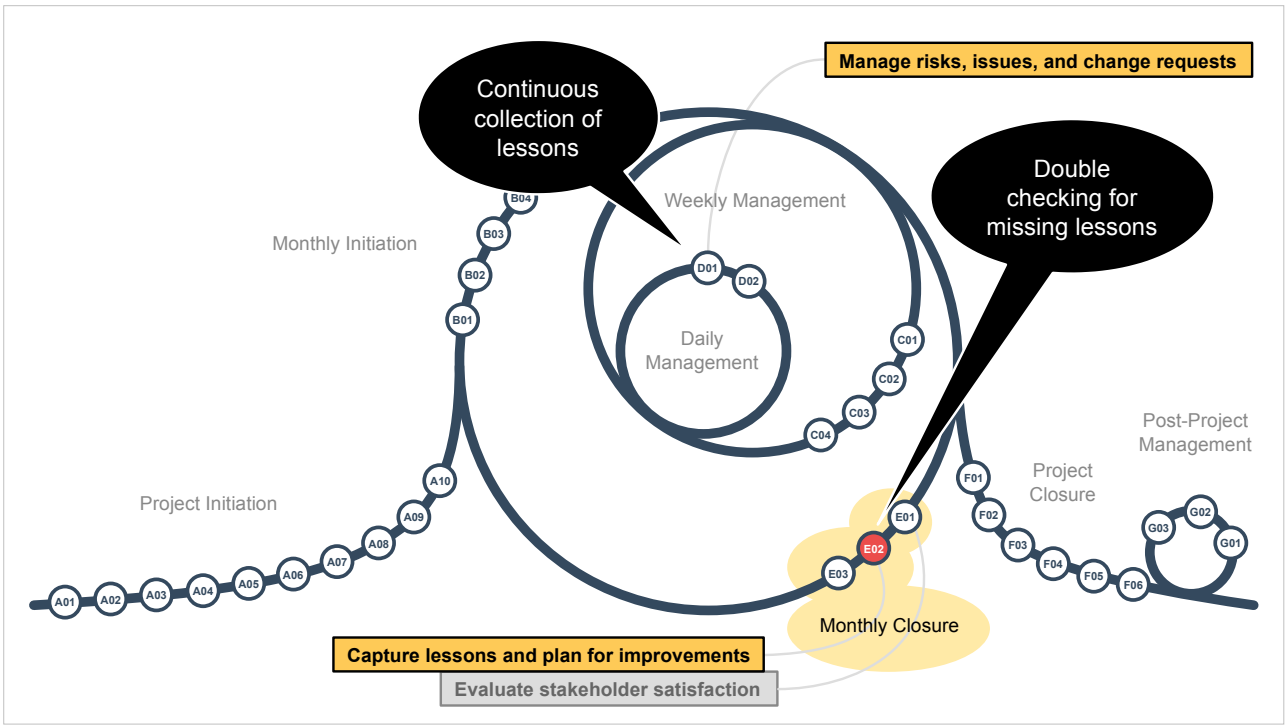
All lessons may be built on a negative experience, i.e., “We did ___ and ___ went wrong, so now we know that we shouldn't do it that way.”

If so, ask them to also think about a few lessons based on positive experiences, i.e., “We always used to do ___, but once we decided to do it like ___, and that improved the result.”

This is important for us because those based on negative experiences are usually reactive, but those based on positive experiences are proactive, and we really want to be proactive as project managers (NUP3).





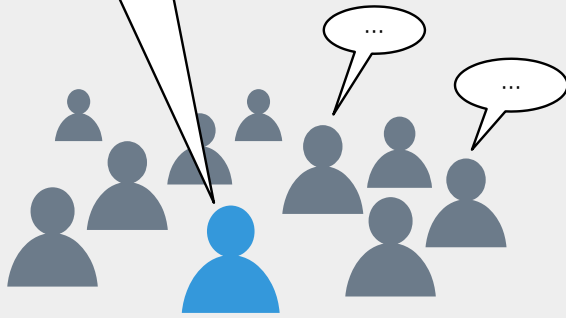




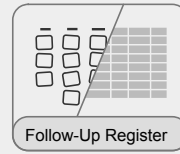
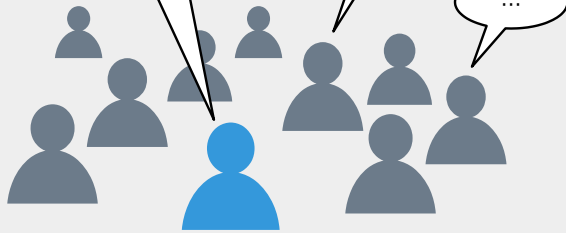
Have we learned anything other than those reflected into the follow-up register?



Have we learned anything other than those reflected into the follow-up register?

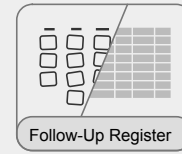


Have we learned anything other than those reflected into the follow-up register?



Follow-Up Register

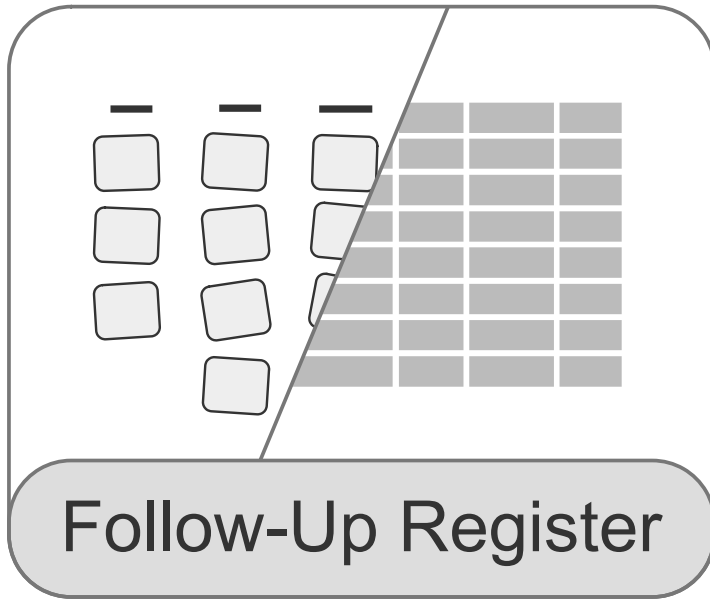
Have we learned anything other than those reflected into the follow-up register?

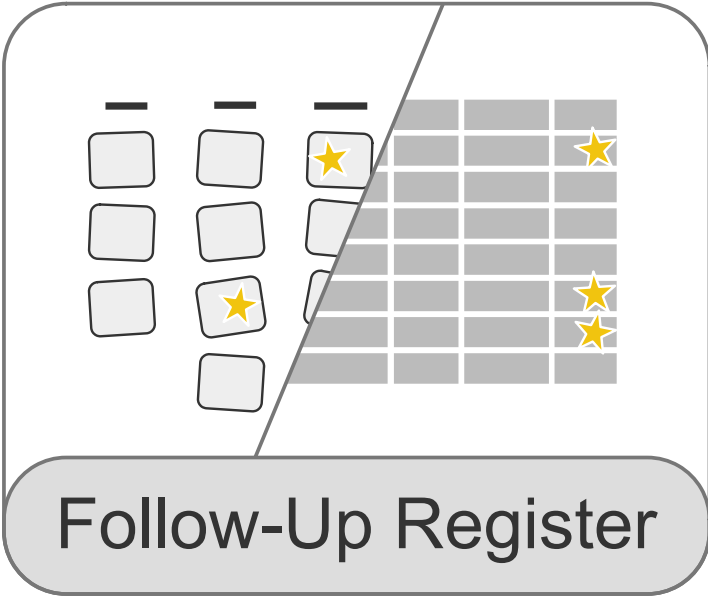


Is it related to an existing item in the register?

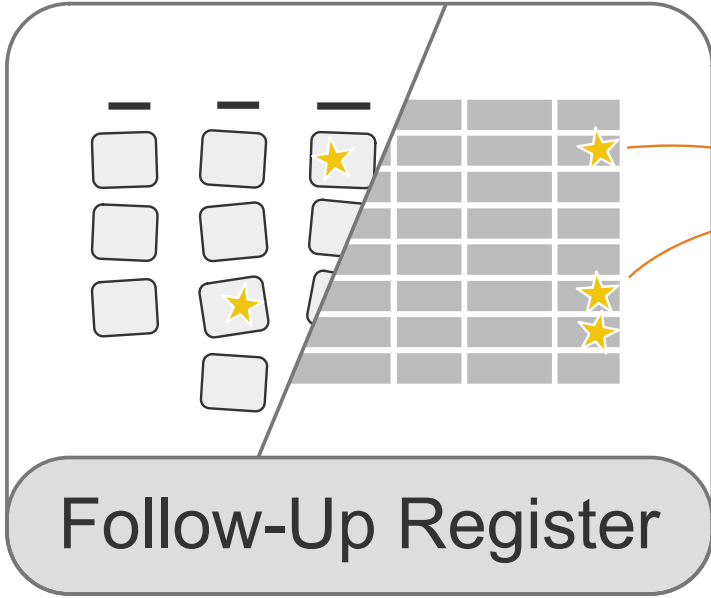
- Yes → Add it to the item as a comment
- No → Create a standalone item for it

So, even though we insist a lot on having organic, gradual creation of lessons learned, we still have E02, where we pause once a month and check to see whether we've collected all lessons, and if not, we'll add them.

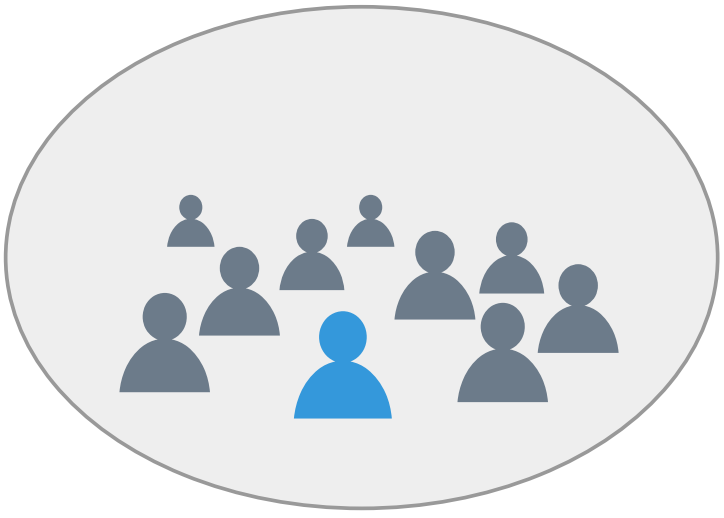
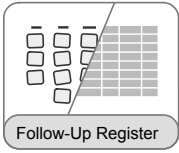


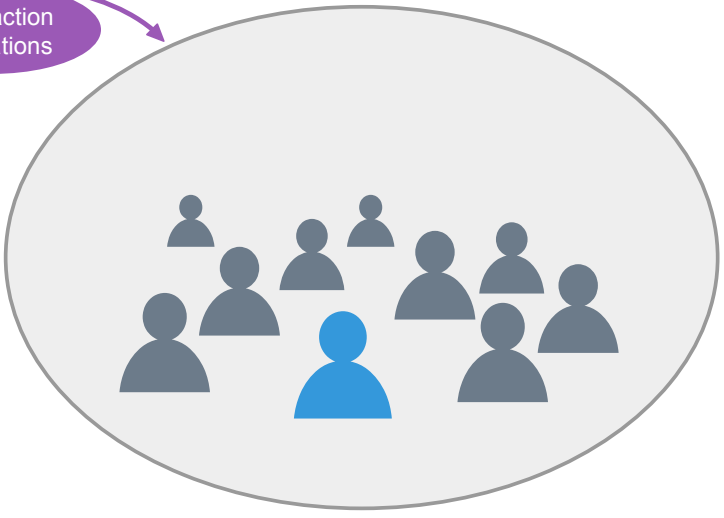
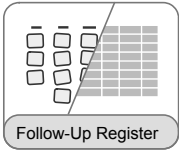


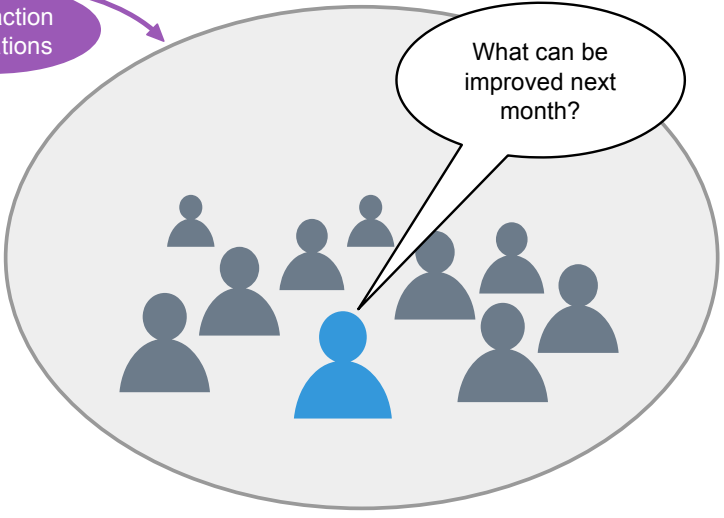
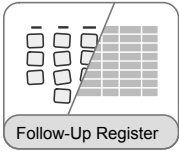
Follow-Up Register

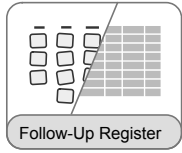


The follow-up item contains a significant lesson!



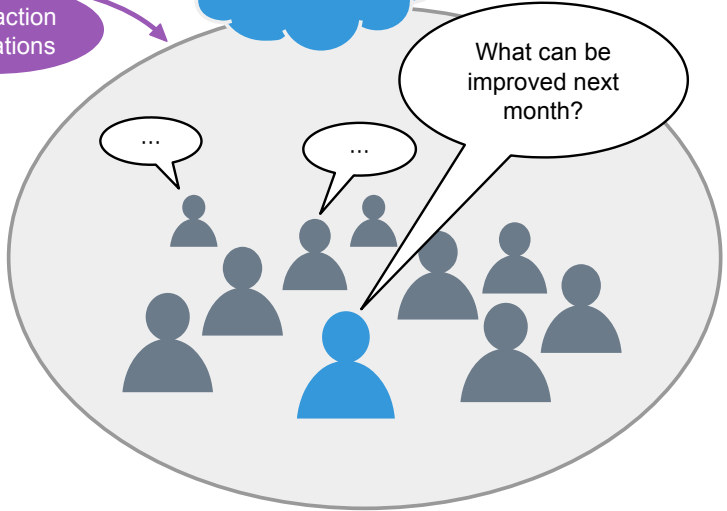




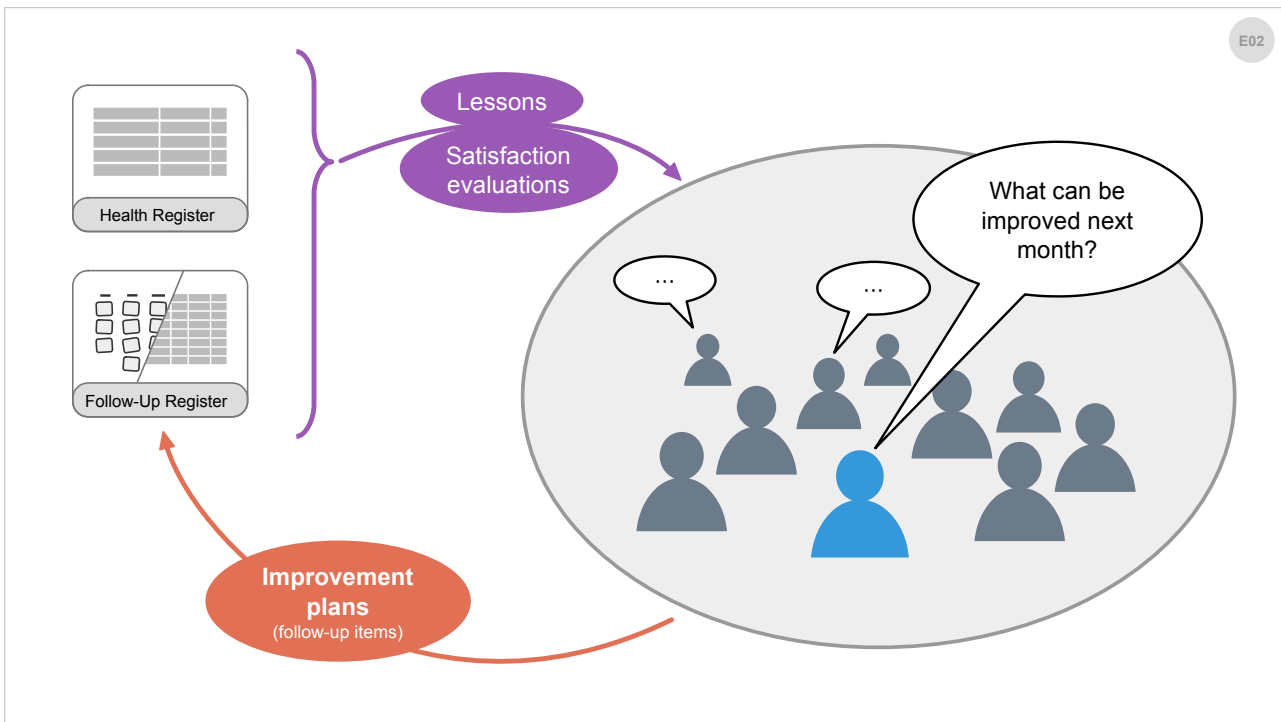


Lessons
Satisfaction evaluations

Wisdom of Crowds

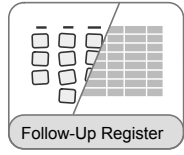


What can be improved next month?

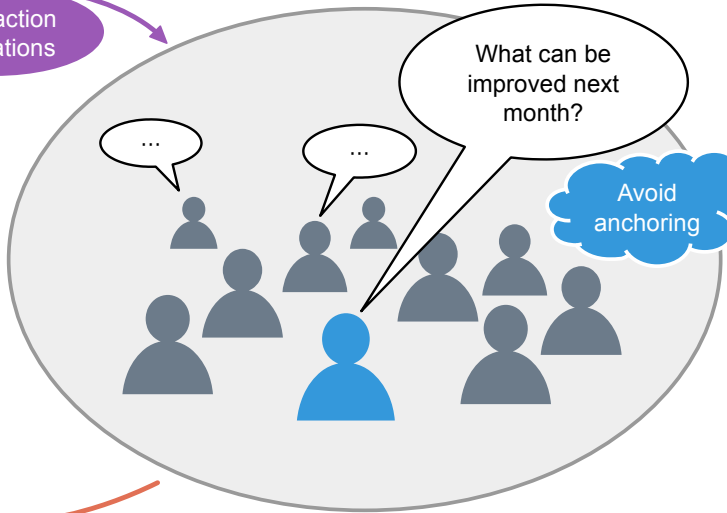


Capturing missing lessons is one of the things we do in this activity. The other related thing we do is create improvement plans: We look at the past month and wonder if it's possible to make any positive changes to how we're working.

Note: These "improvements" are about the way we work rather than improvements to the project's output.

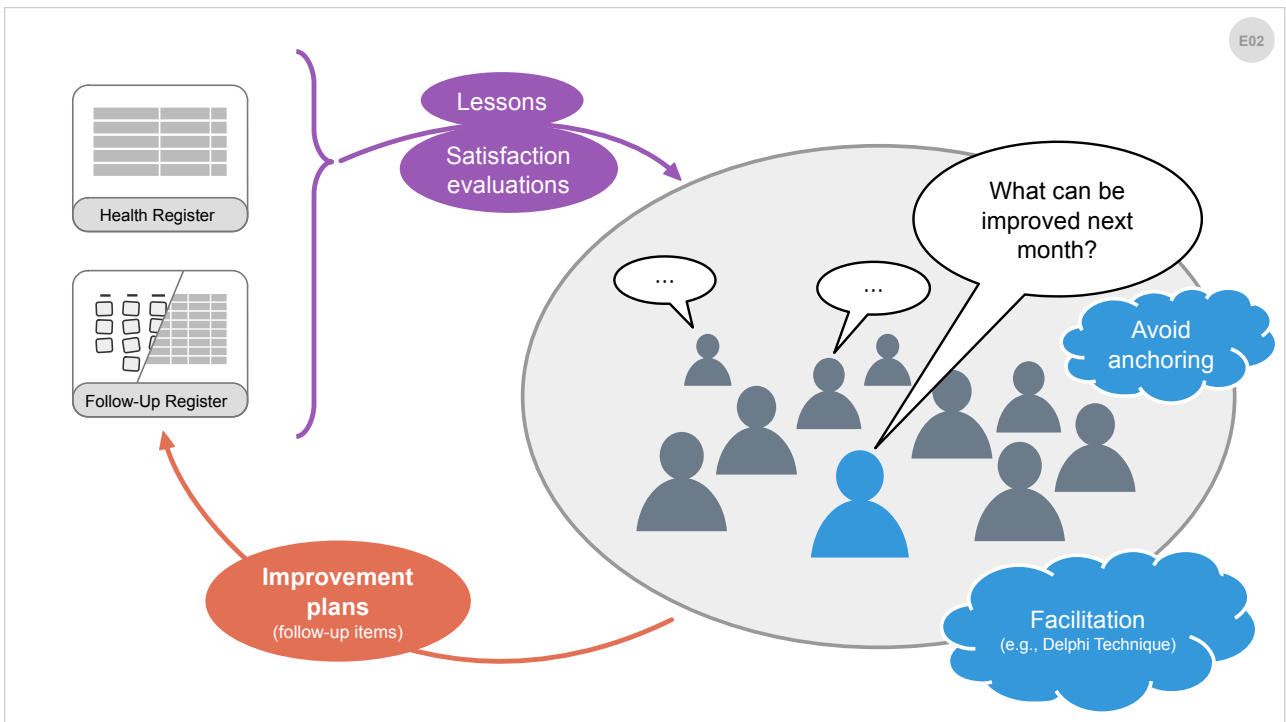


Lessons
Satisfaction evaluations

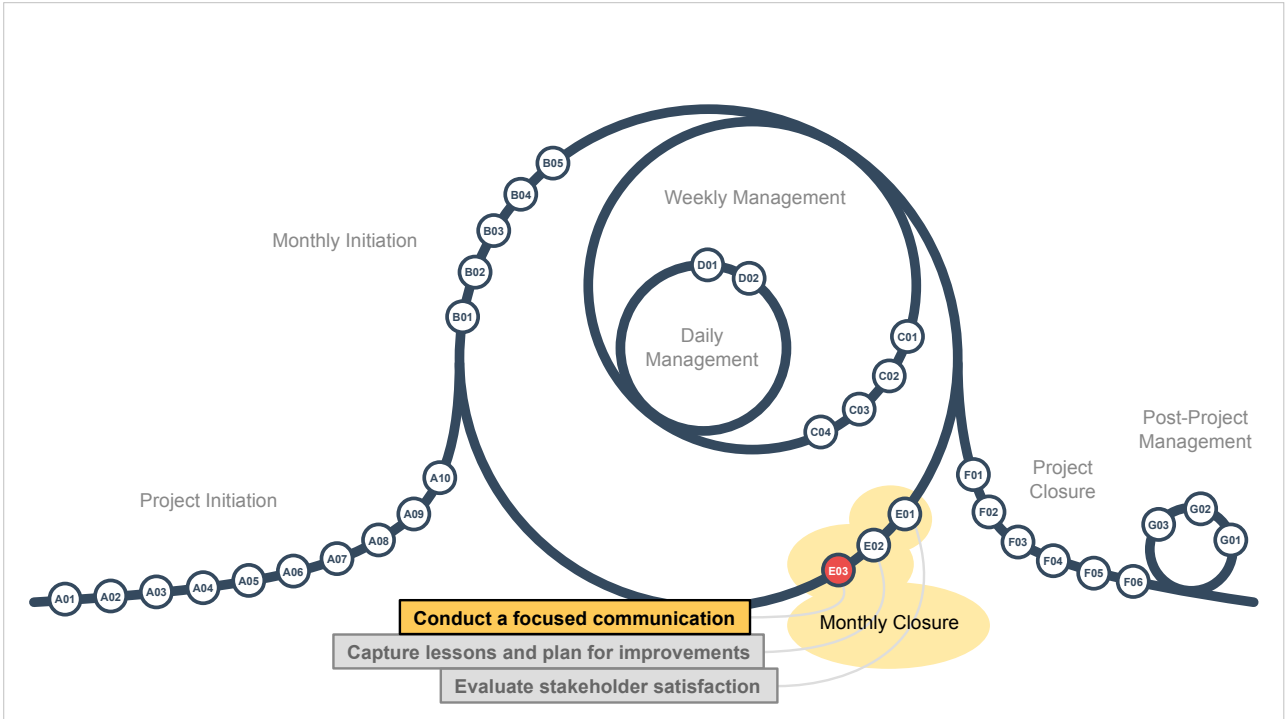


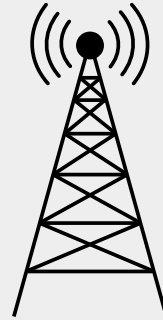
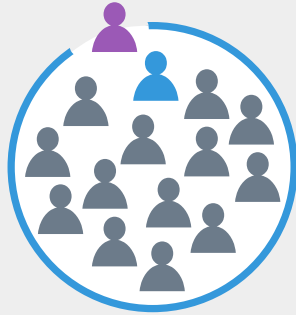
Improvement plans
(follow-up items)

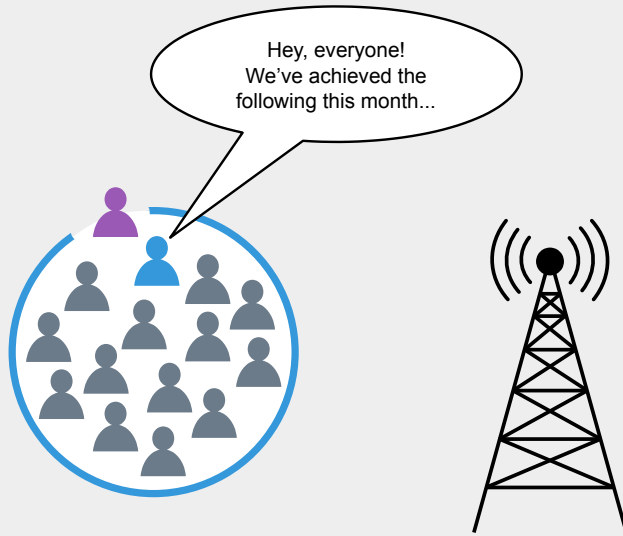


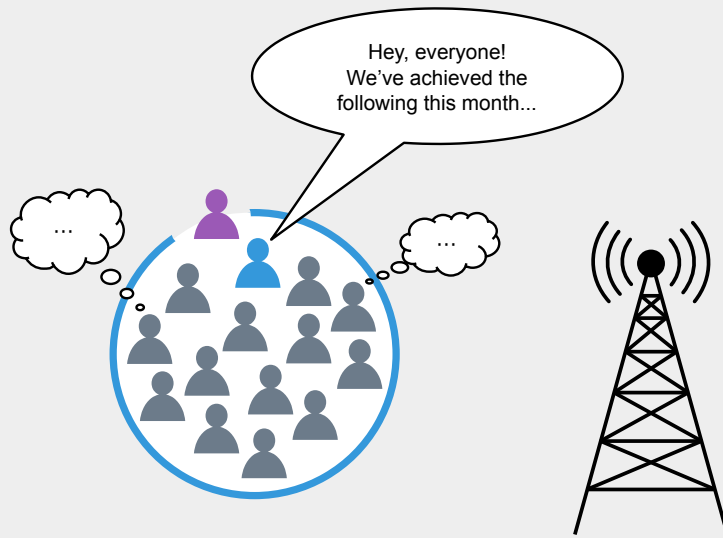


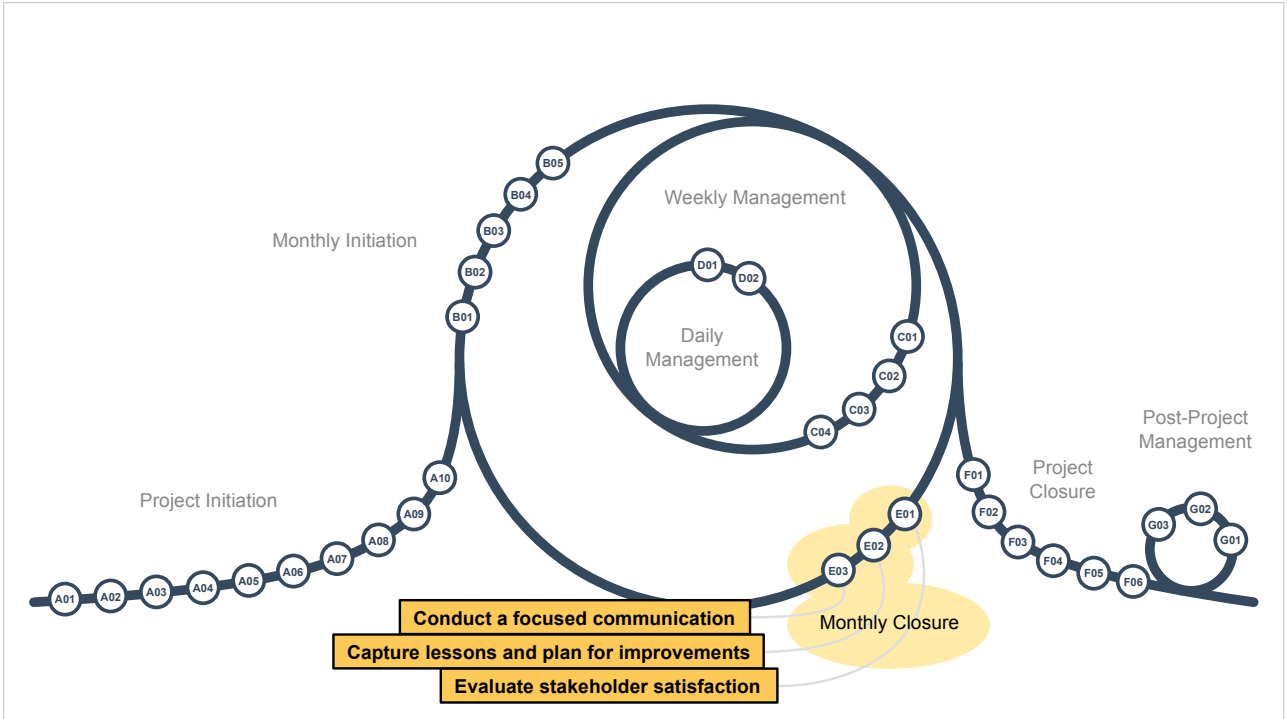
It's best to involve all team members in designing improvement plans using the Wisdom of Crowds. Doing so requires serious facilitation to really involve everyone, avoid anchoring (implicitly limit everyone to one or a few options rather than letting them explore all), etc.











① High-level overview

② Full review

- Ⓐ Project Initiation
- Ⓑ Monthly Initiation
- Ⓒ Weekly Management
- Ⓓ Daily Management
- Ⓔ Monthly Closure
- Ⓕ Project Closure
- Ⓖ Post-Project Management



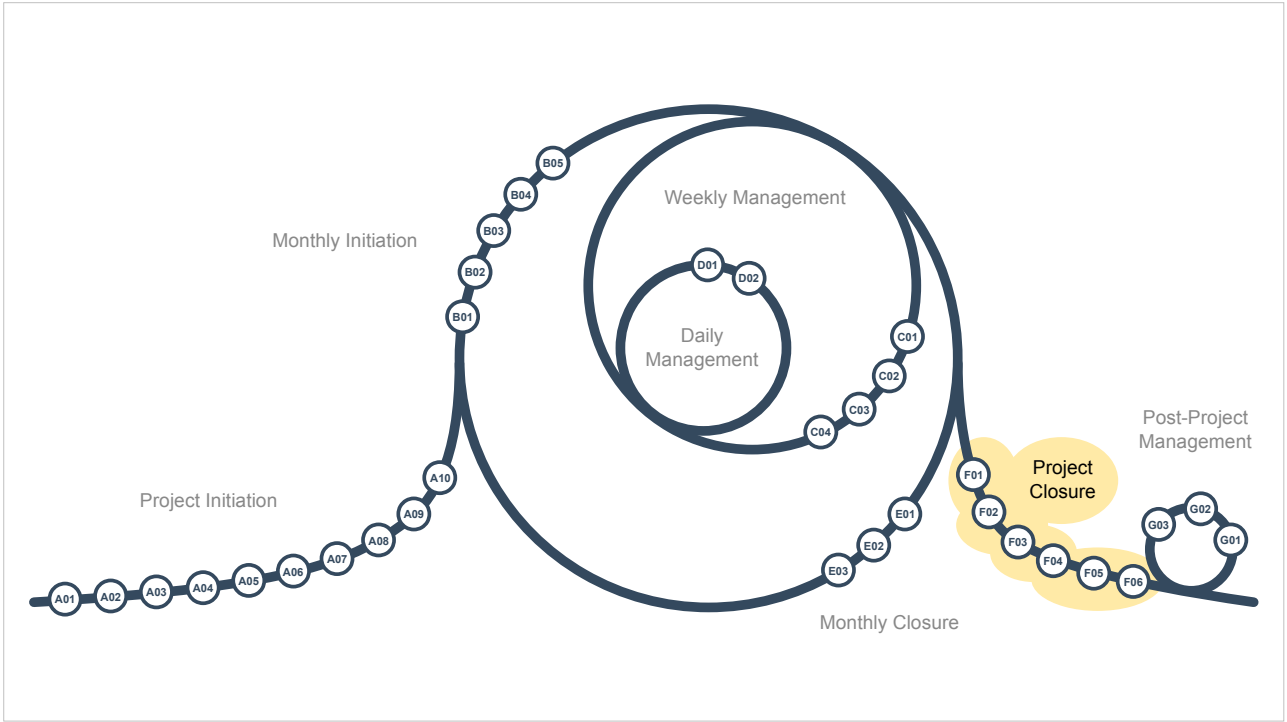
③ NUPP

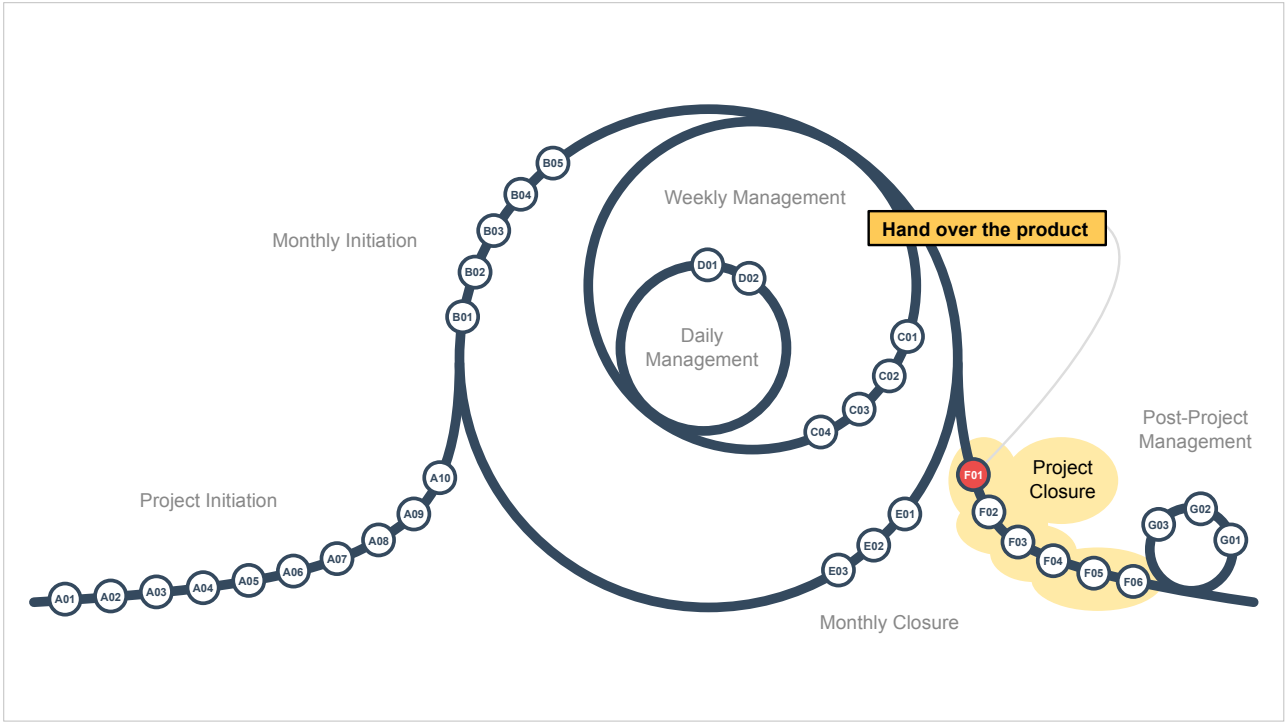
④ Tailoring

⑤ Development methods

⑥ Code of conduct

⑦ Certification program



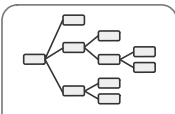


1



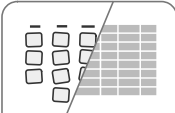
Project Description

2



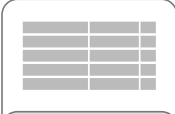
Deliverables Map

3



Follow-Up Register

4



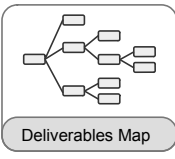
Health Register

1



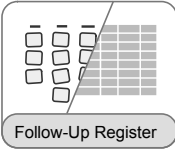
Project Description

2



Deliverables Map

3



Follow-Up Register

4



Health Register

Have we achieved the goal and satisfied the requirements?

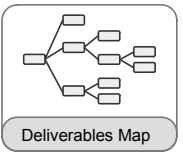
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Project Description

Have we achieved the goal and satisfied the requirements?

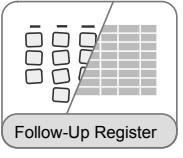
2



Deliverables Map

Are all items **closed**?

3



Follow-Up Register

4



Health Register

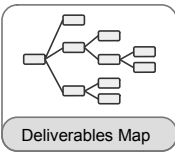
1



Project Description

Have we achieved the goal and satisfied the requirements?

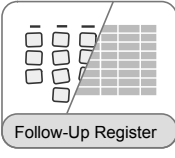
2



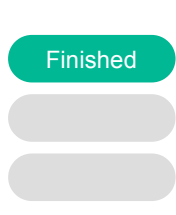
Deliverables Map

Are all items **closed**?

3



Follow-Up Register



4



Health Register

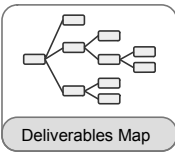
1



Project Description

Have we achieved the goal and satisfied the requirements?

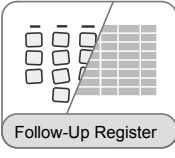
2



Deliverables Map

Are all items **closed**?

3



Follow-Up Register

Finished

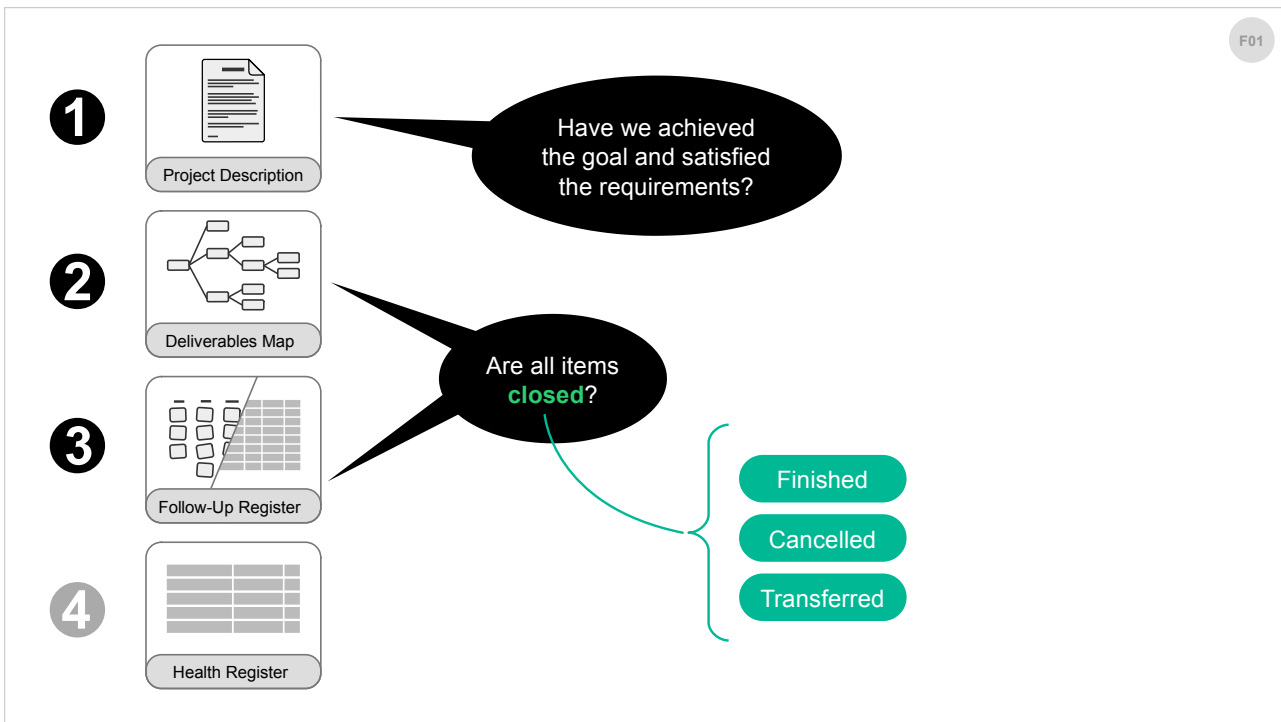
Cancelled



4



Health Register



EVERYTHING must be closed (deliverables and follow-up items), but it doesn't mean that everything must be finished, as there are different ways of closing something.

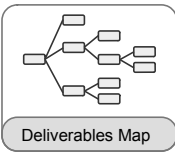
Note: If a deliverable is deemed unnecessary in the middle of the project, we won't "delete" it from our documents, but we will "close" it as a "canceled" item so that the integrity of our documents is not harmed.

1



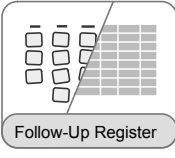
Have we achieved the goal and satisfied the requirements?

2



Are all items **closed**?

3

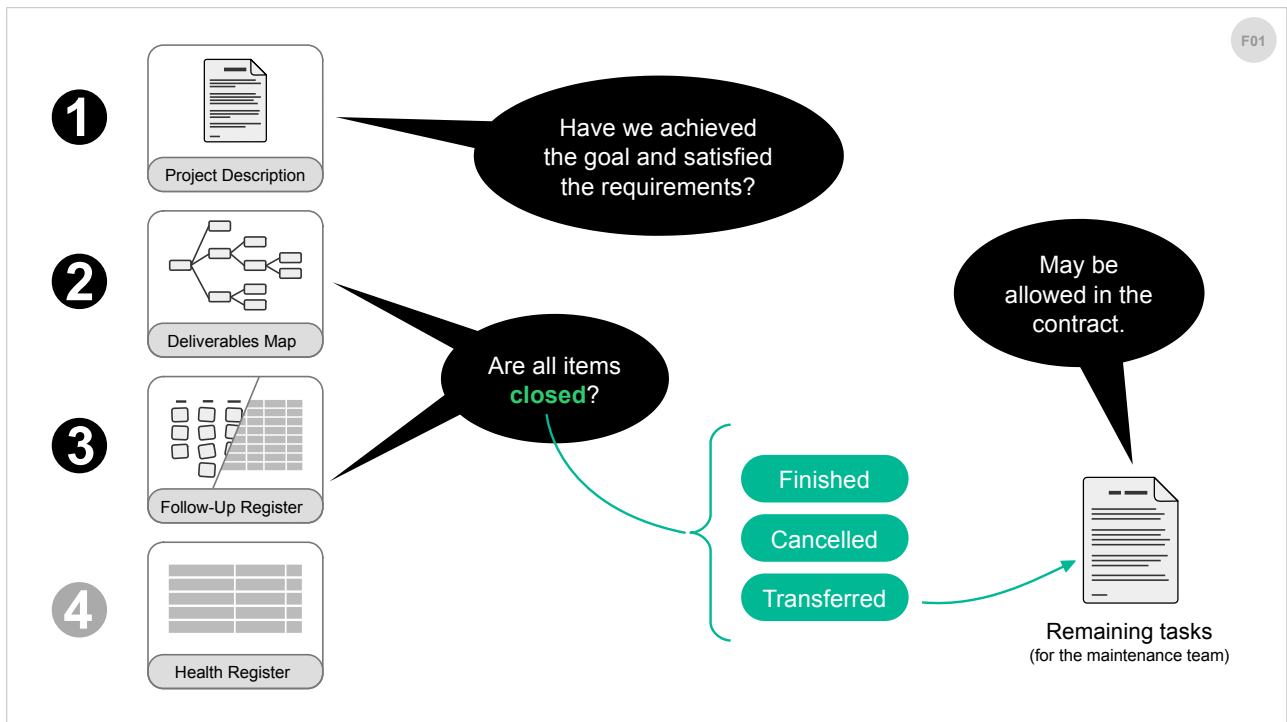


- Finished
- Cancelled
- Transferred

4

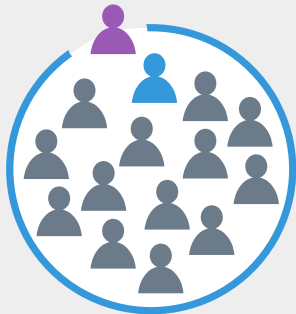


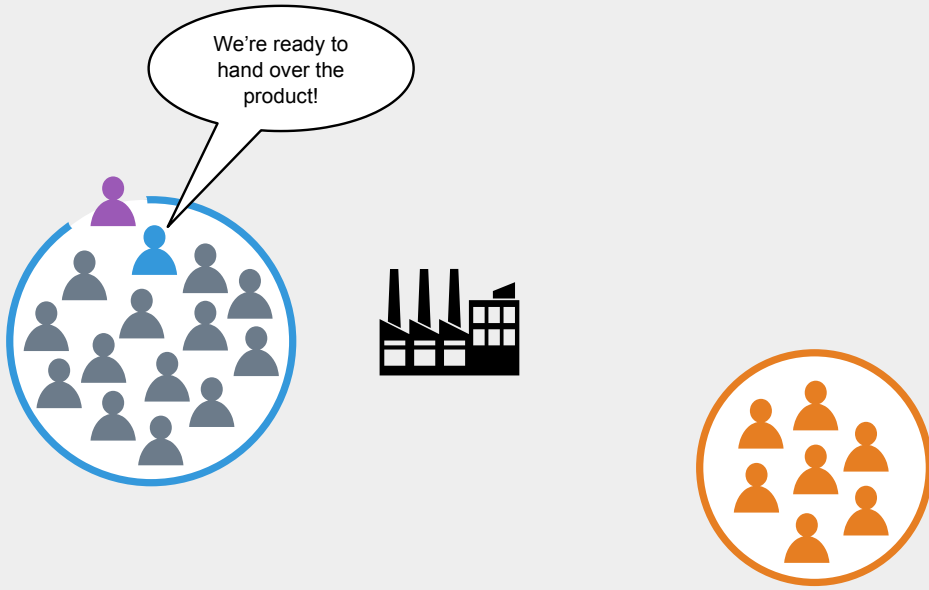
Remaining tasks
(for the maintenance team)

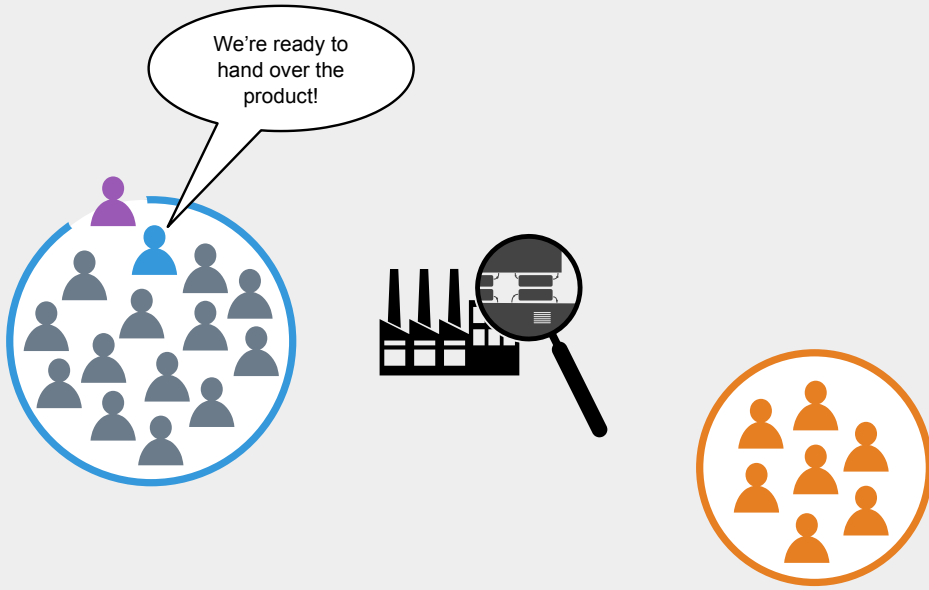


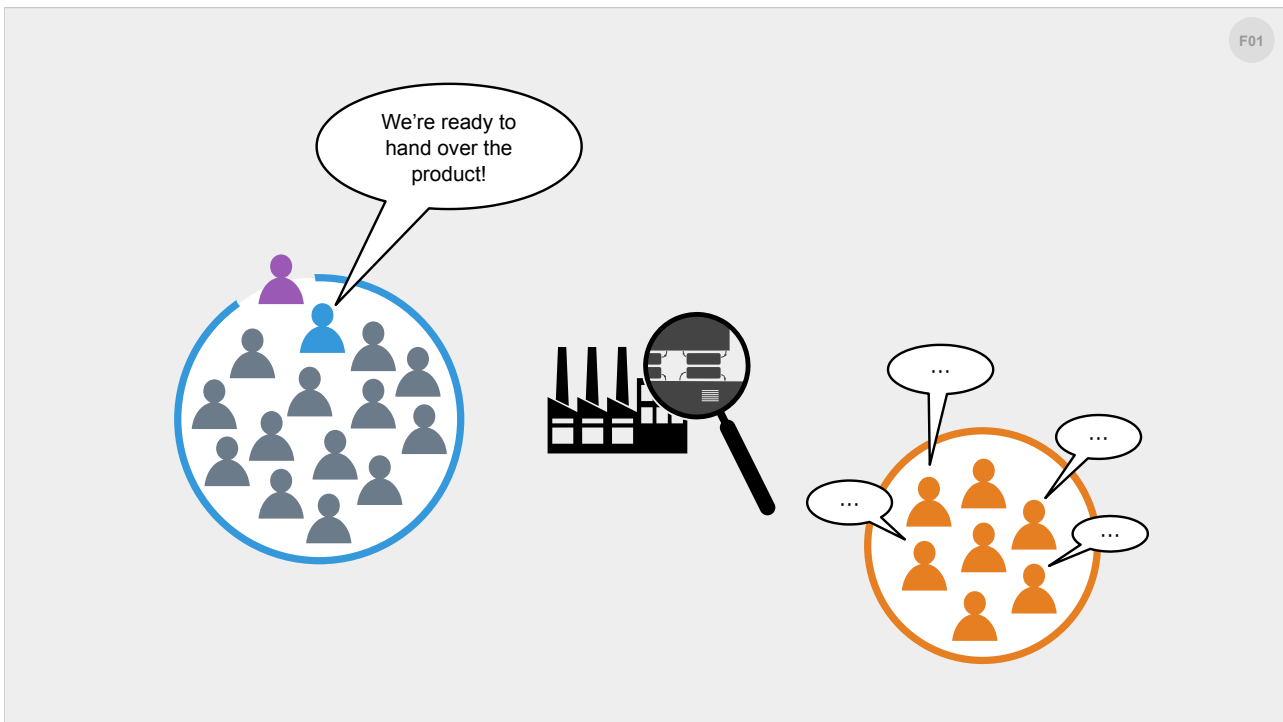
In some contracts, everything must be finished before we can close the contract. In contrast, some allow a maximum percentage of small works (e.g., a maximum of 5%) that might be otherwise extended over a long time to be transferred to a maintenance team, and the project closed without them.

It's a good idea to use this feature when possible and close the project without letting it slow down and stretch.





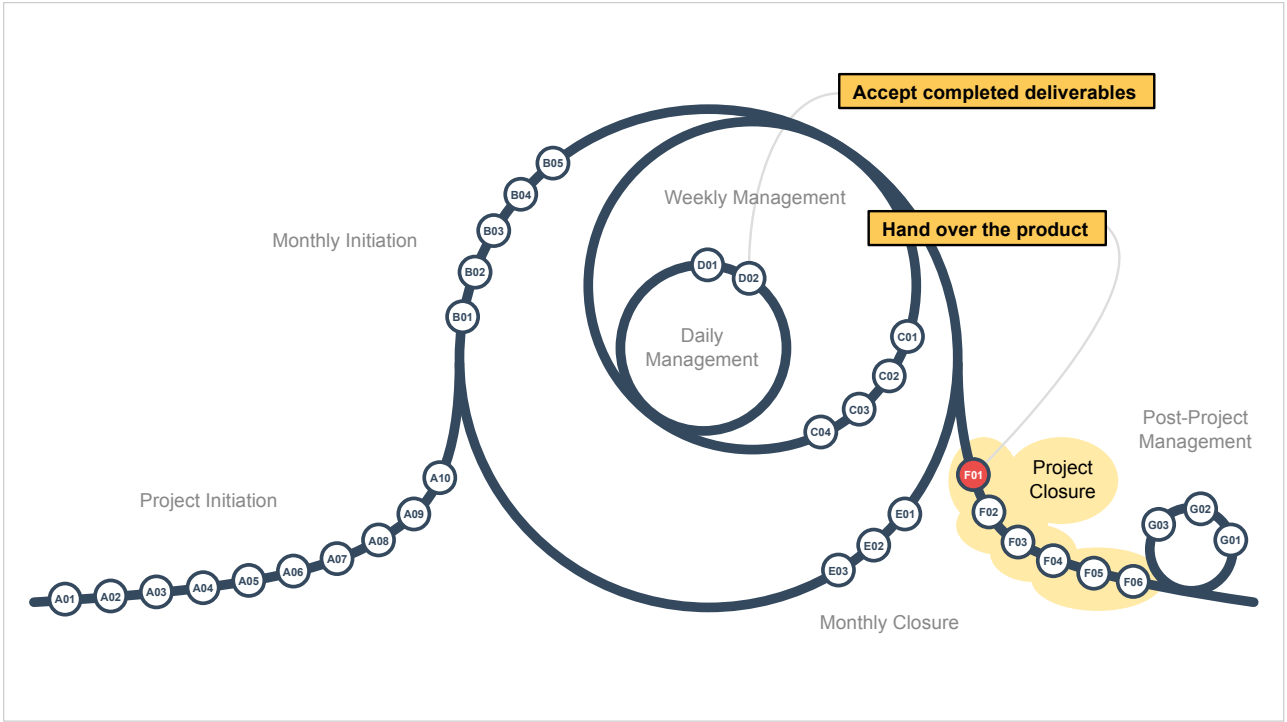


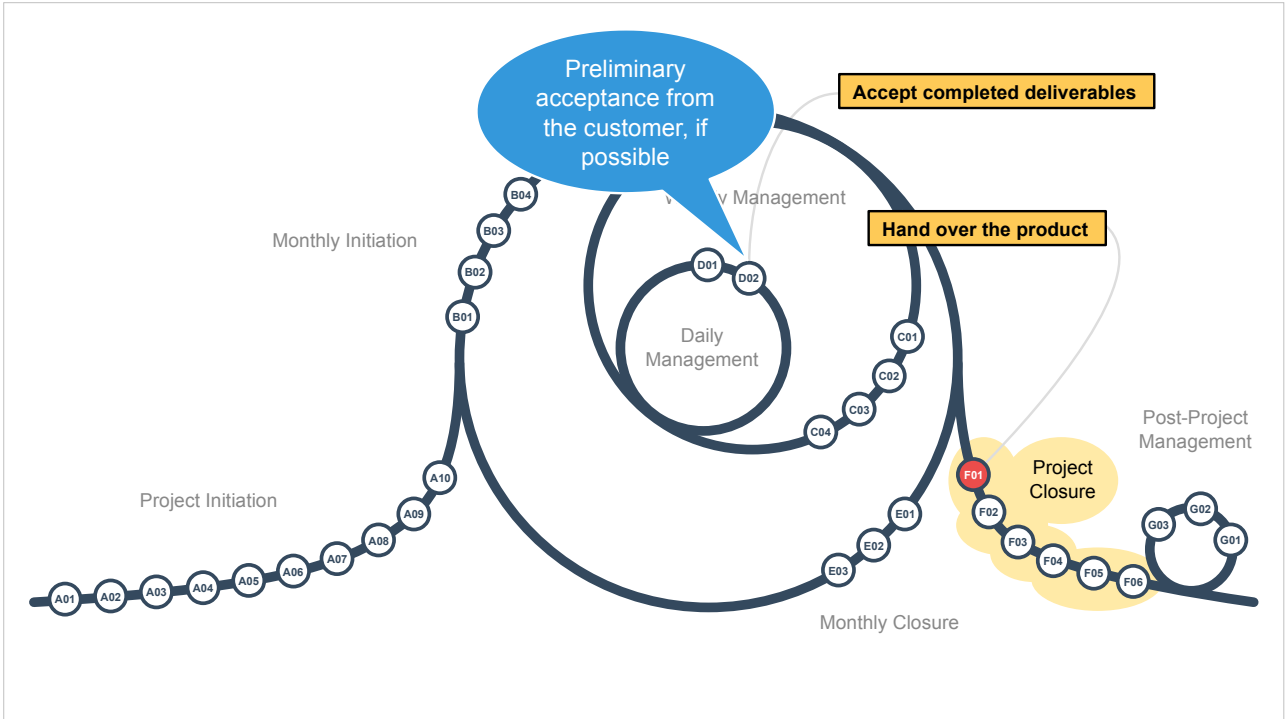


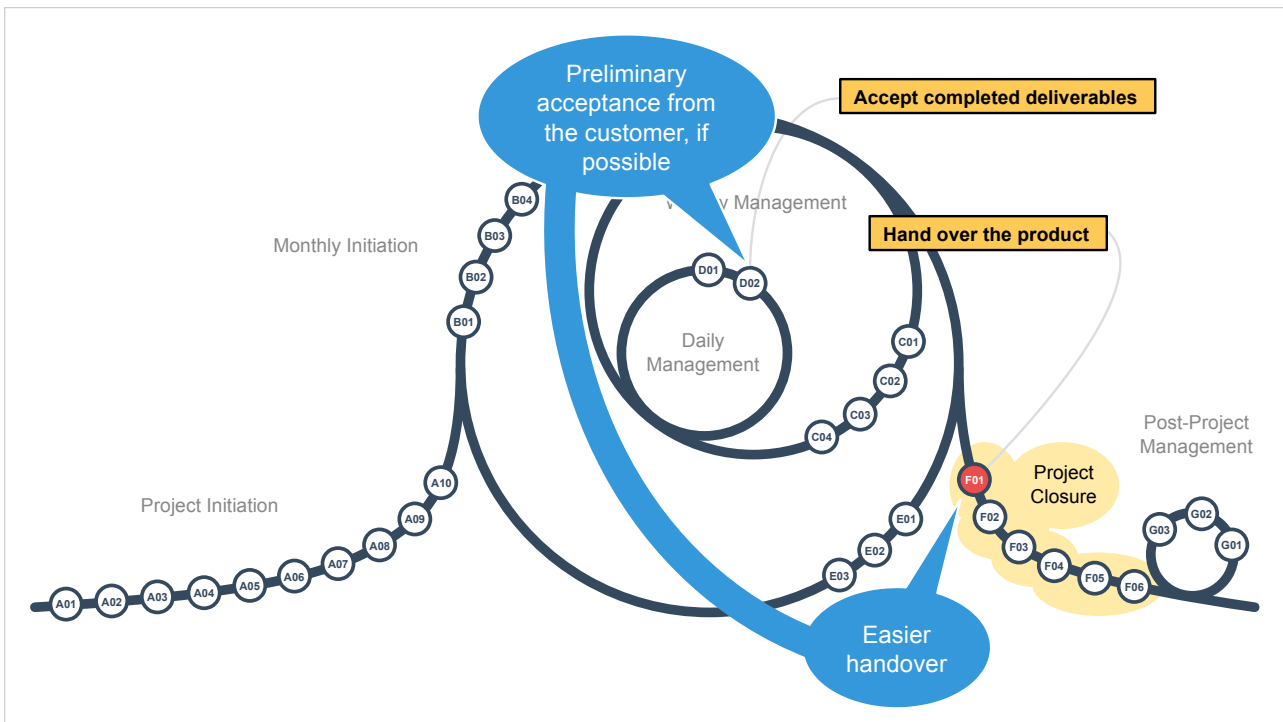
When there's an external customer, the handover process is more serious, and specific documentation may also be required.

The handover may also have legal implications; e.g., in a construction project, the responsibility for the security of the premises will be transferred to the customer when the output is handed over. So, the supplier would remove their security personnel and hand over the keys to the customer.

On the other end of the spectrum, the handover may be much simpler and limited to scope verification and financial closure.

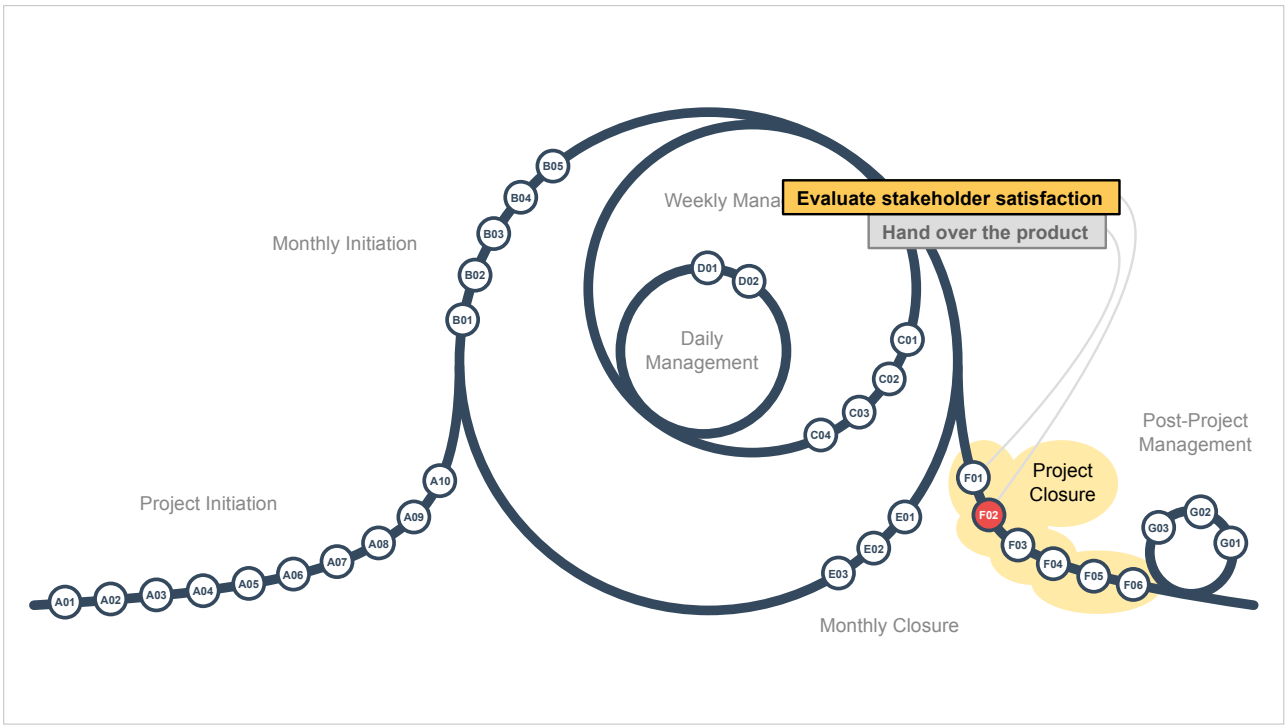


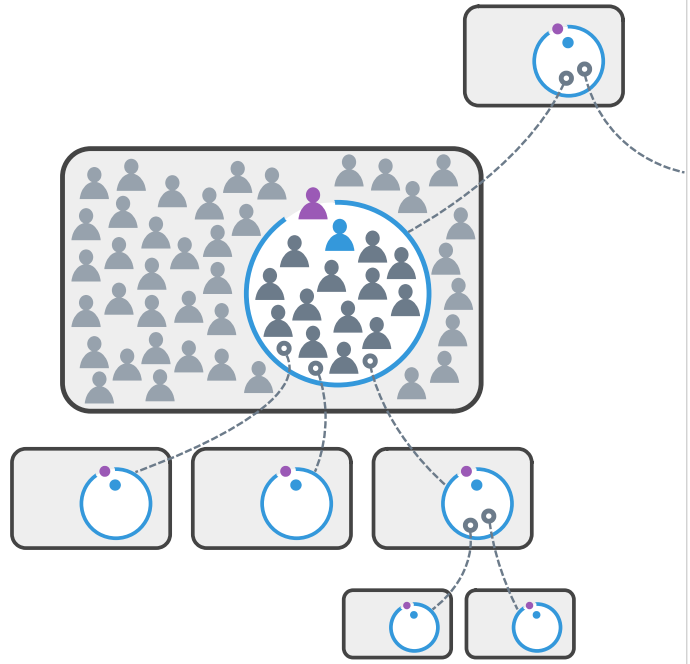




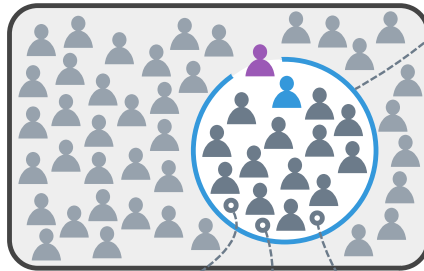
Regardless of the steps required for the handover, it always includes validation and confirmation of the final output. This can become much simpler if we have provisional acceptance of the requesting body in D02.

Project Closure is also run when the project is canceled in B03 or in response to escalated concerns in D01 or C02. When so, you may still have to hand over the partial output.

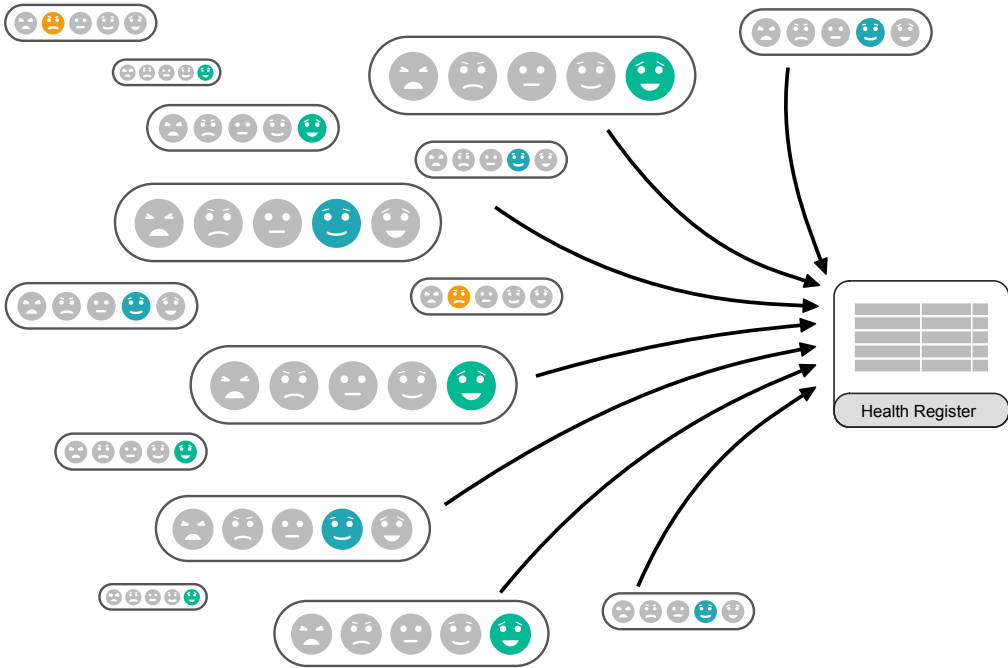


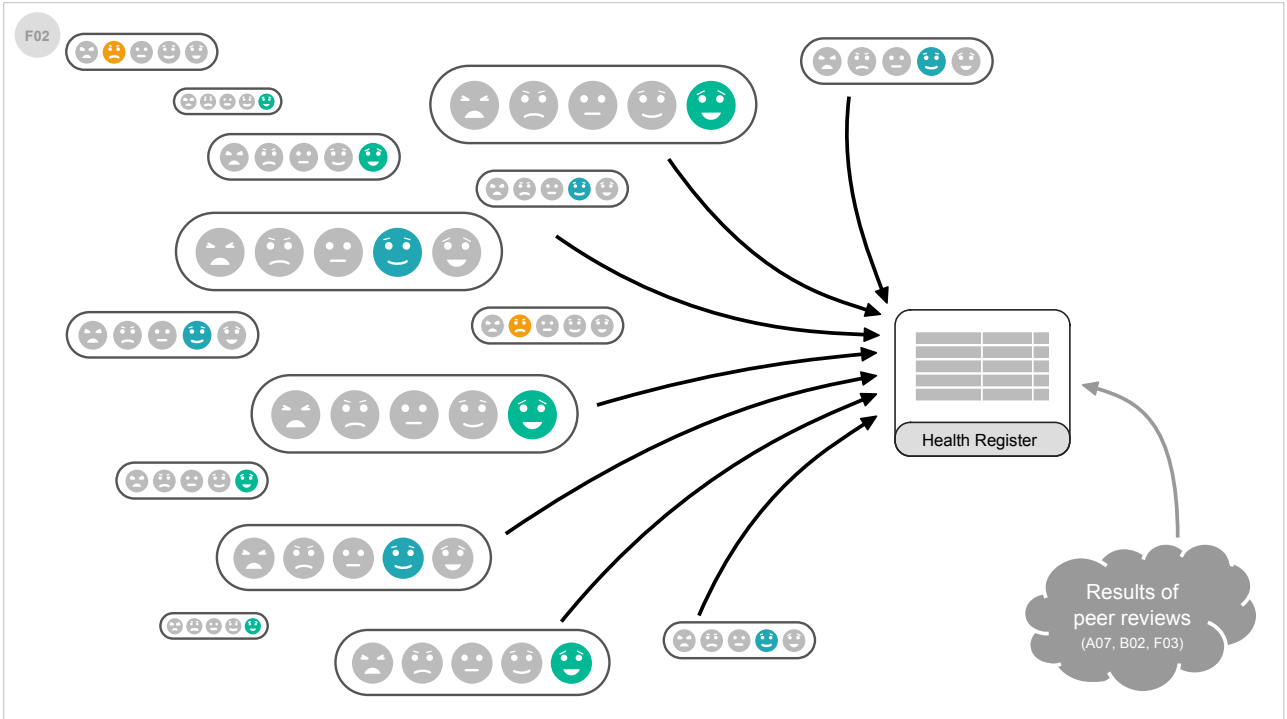


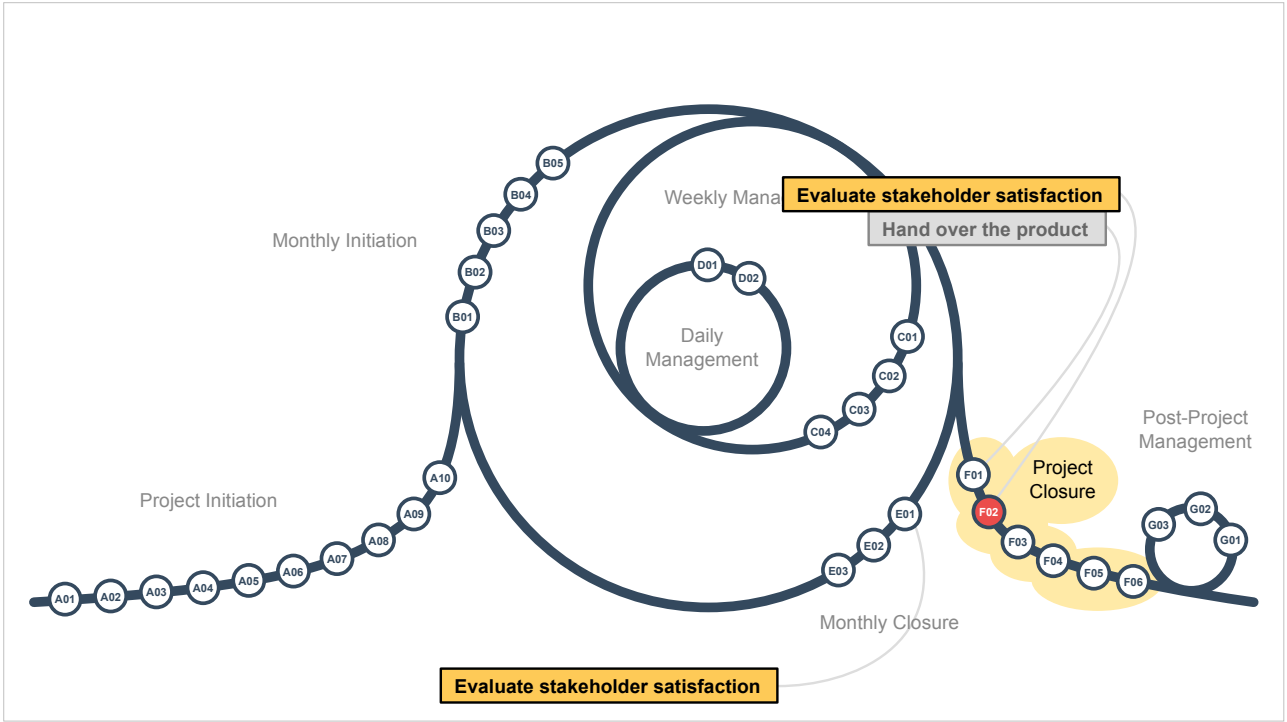
F02

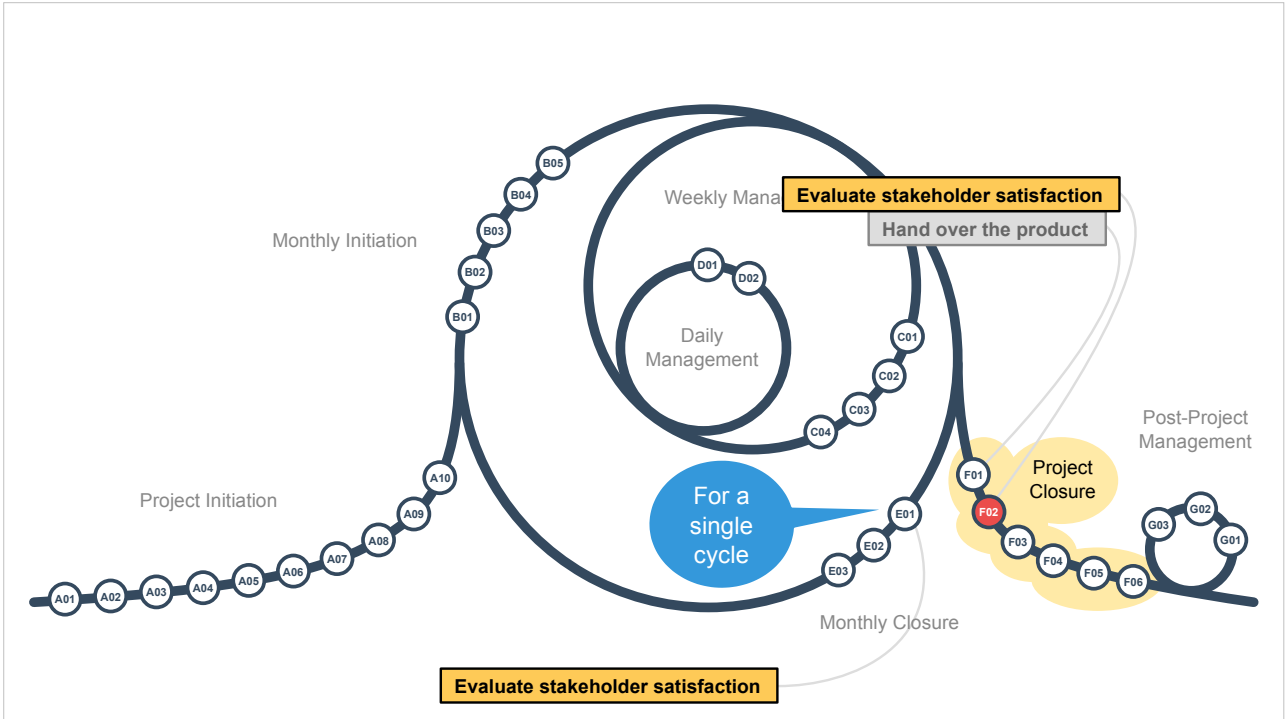


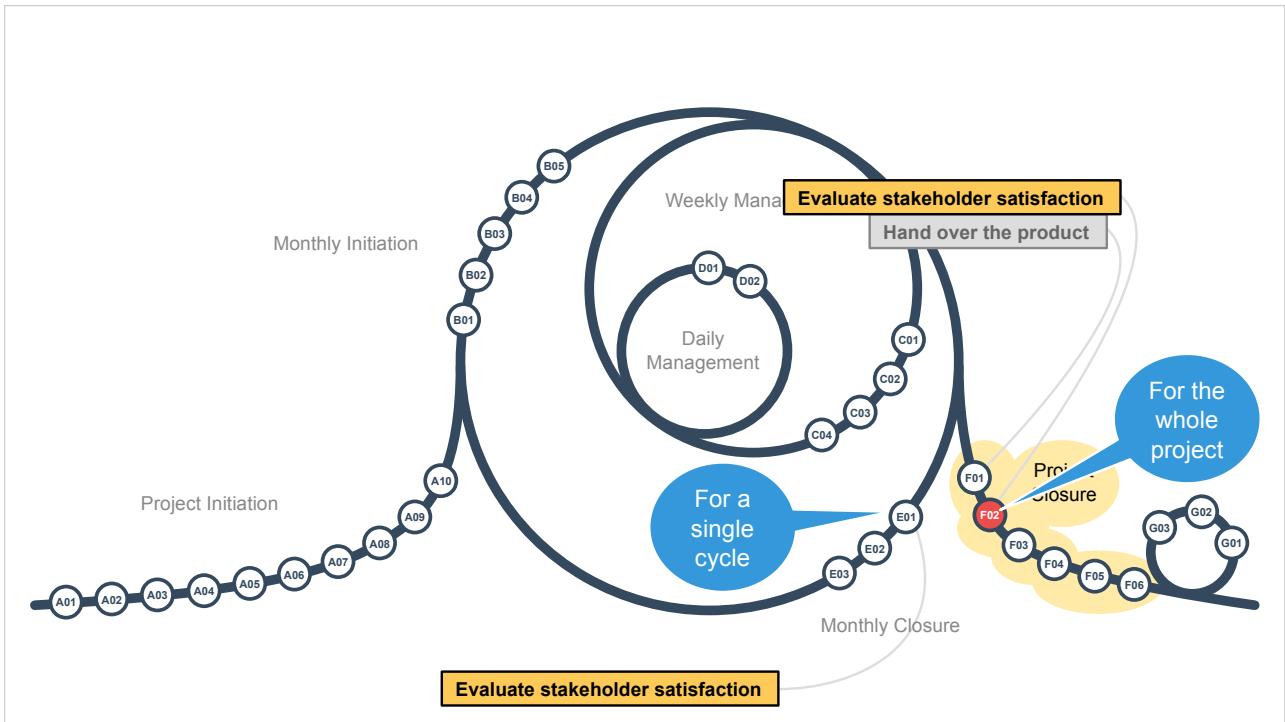
F02



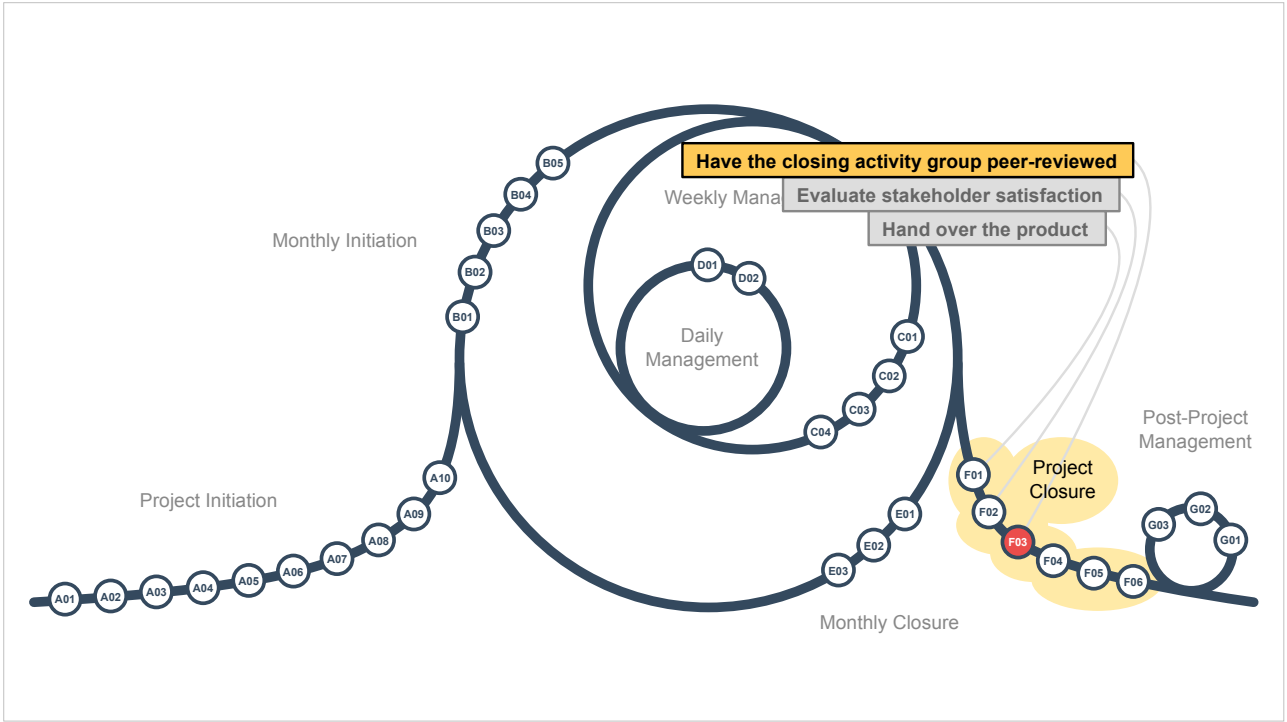








This is the last satisfaction evaluation, and we don't have time to do much about its result. The main reason for doing it is to learn how the project (as a whole) worked for various stakeholders and use that information in future projects.

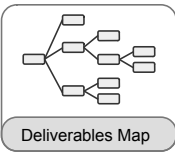


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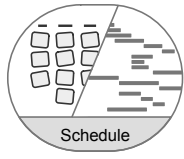


Project Description

2

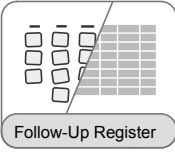


Deliverables Map



Schedule

3



Follow-Up Register

4



Health Register



Project Manager

Peer Reviewer

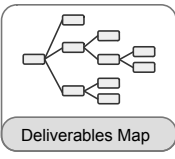
A person with project management expertise, external to the project

1

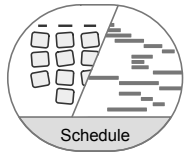


Project Description

2

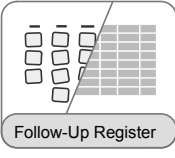


Deliverables Map



Schedule

3

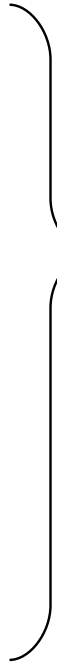


Follow-Up Register

4



Health Register



To be reviewed

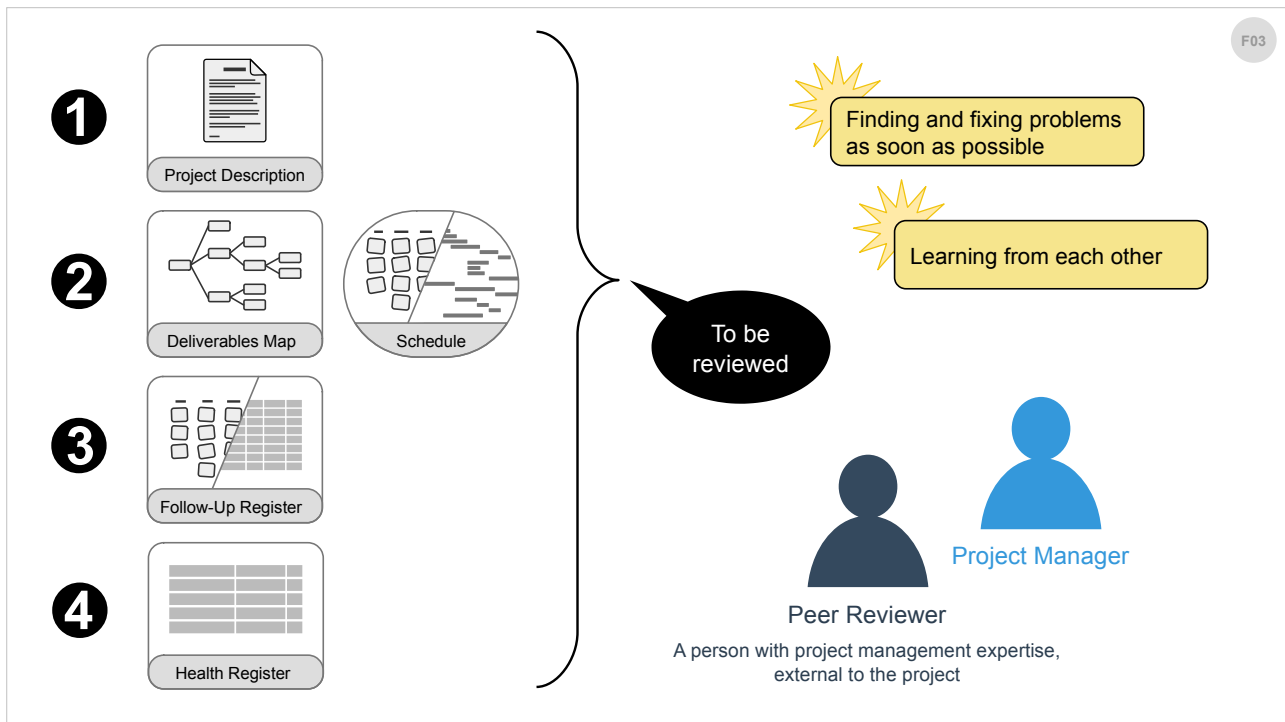


Peer Reviewer

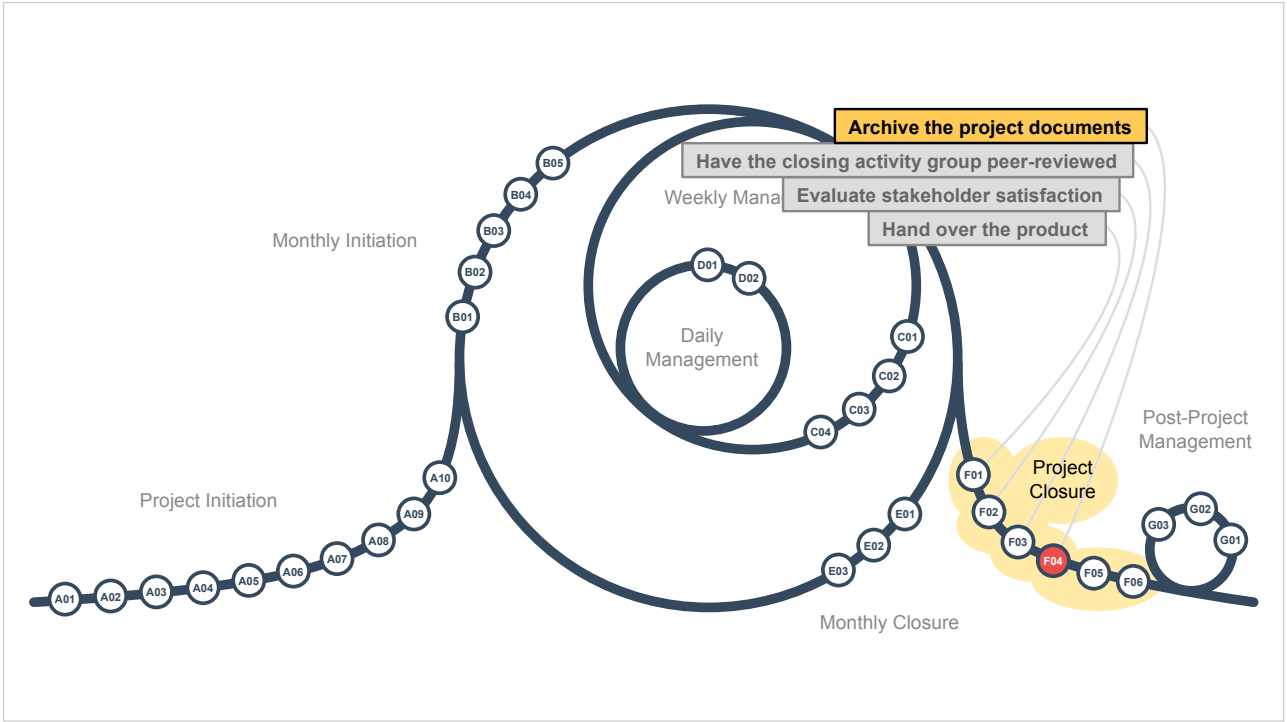
A person with project management expertise, external to the project



Project Manager

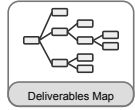


This peer review shouldn't be underestimated because Project Closure is sensitive. It's best to use one of the best peers for this review to ensure everything is OK.

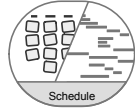




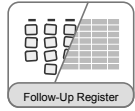
Project Description



Deliverables Map



Schedule

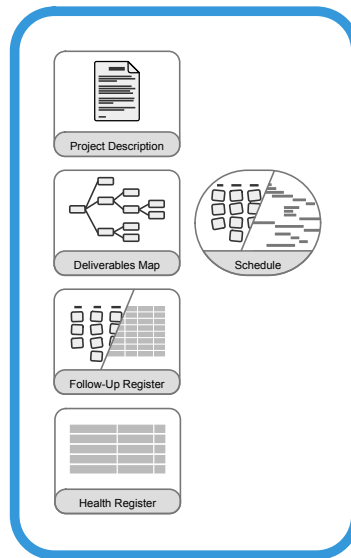


Follow-Up Register



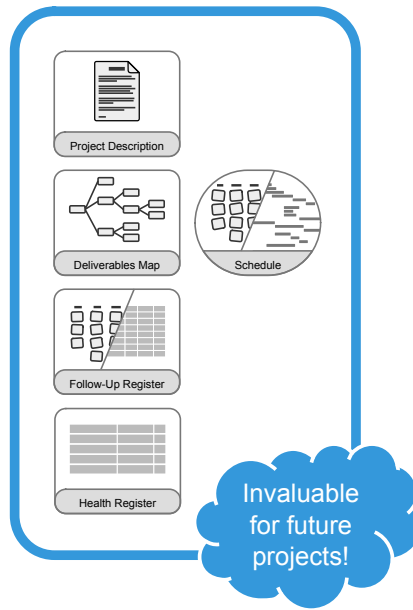
Health Register

Archive



Please emphasize the importance of having clear and useful documents and their proper archival for future projects during the course!

Archive

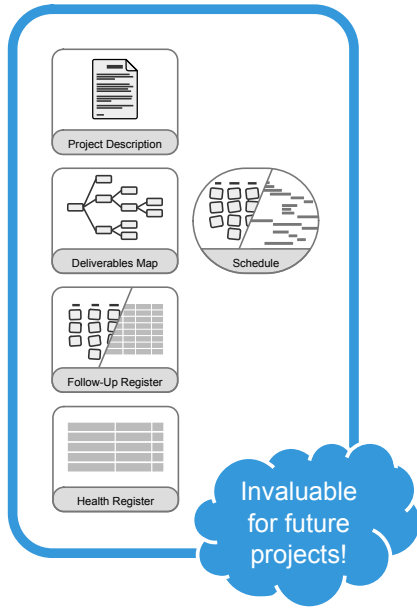


Invaluable
for future
projects!

Archive

Considerations during the project

Clear and understandable

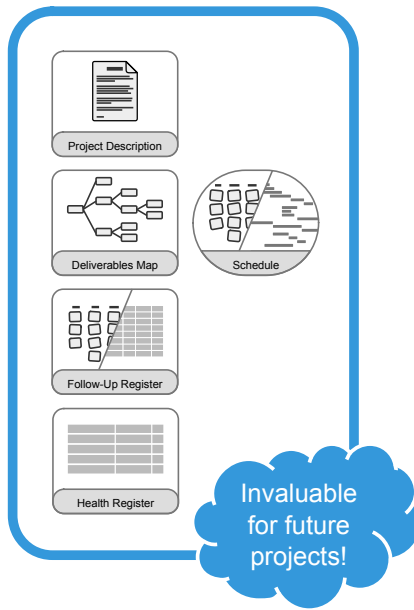


Archive

Considerations during the project

Clear and understandable

Well organized



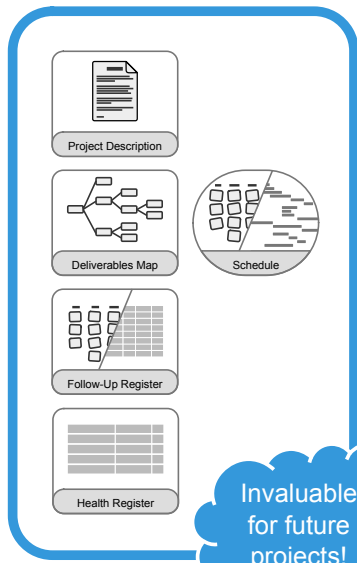
Archive

Considerations during the project

Clear and understandable

Well organized

Future-proof file formats



Invaluable for future projects!

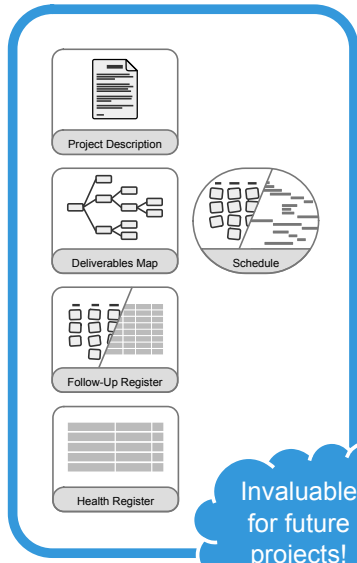
Archive

Considerations during the project

Clear and understandable

Well organized

Future-proof file formats



Considerations when archiving

Cleaned up for future use

Invaluable for future projects!

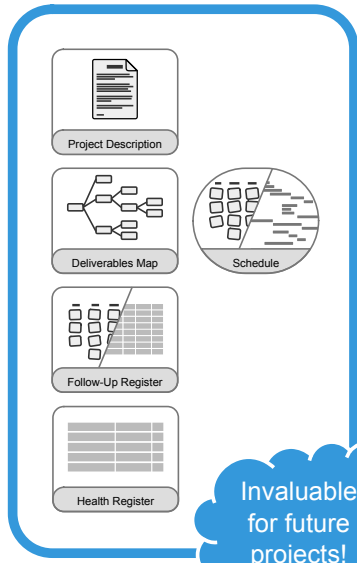
Archive

Considerations during the project

Clear and understandable

Well organized

Future-proof file formats



Considerations when archiving

Cleaned up for future use

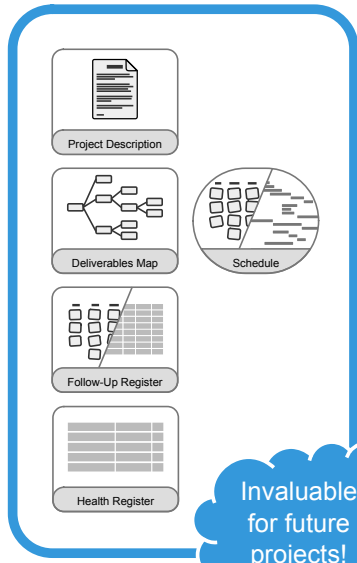
read-only

Invaluable for future projects!

Archive

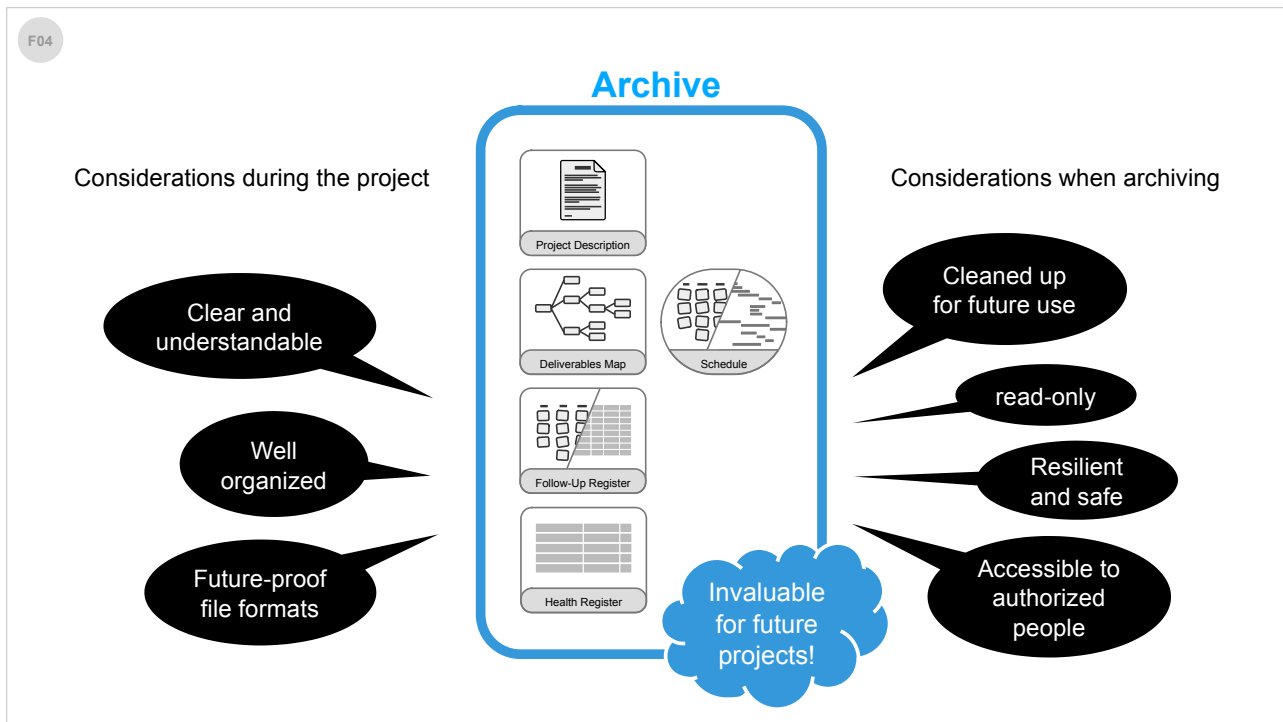
Considerations during the project

- Clear and understandable
- Well organized
- Future-proof file formats



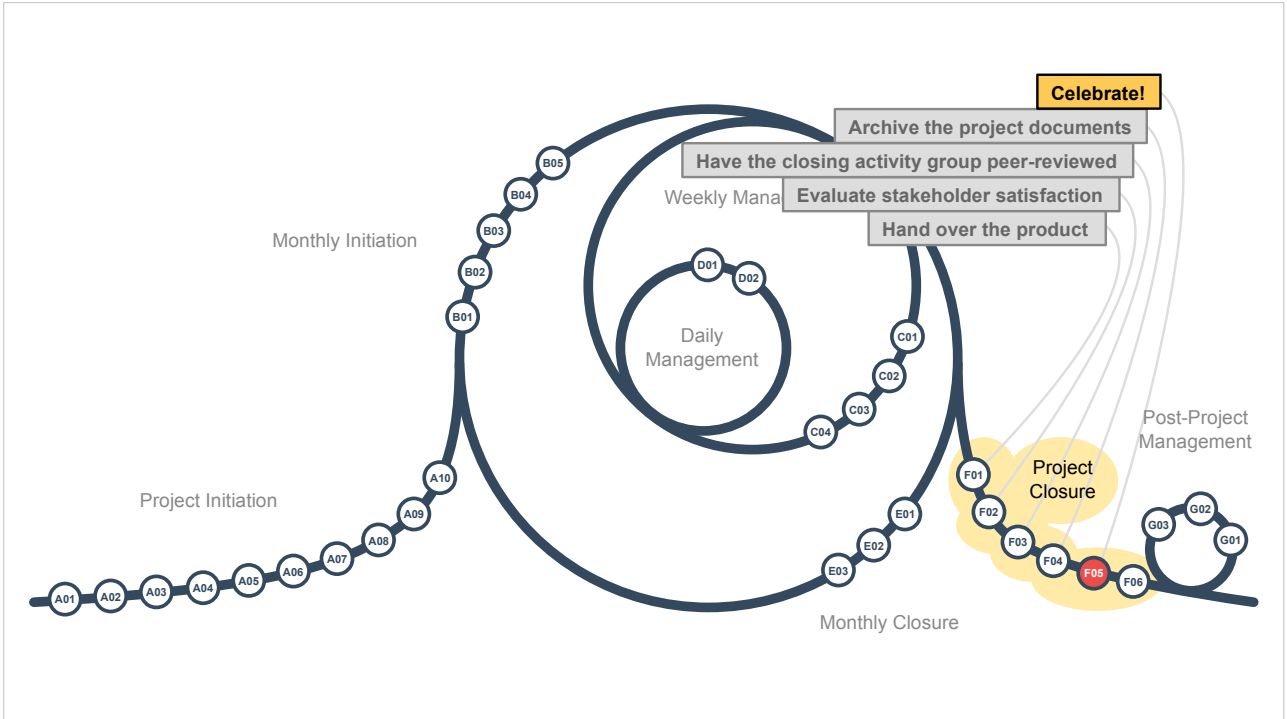
Considerations when archiving

- Cleaned up for future use
- read-only
- Resilient and safe



If we want the project documents to be helpful to future projects, we should have certain concerns during the project (left side) and some in this activity (right side).

If you have a computer-savvy audience, you can spend more time discussing proper archival, e.g., adding error correction to the archival data for improved longevity.



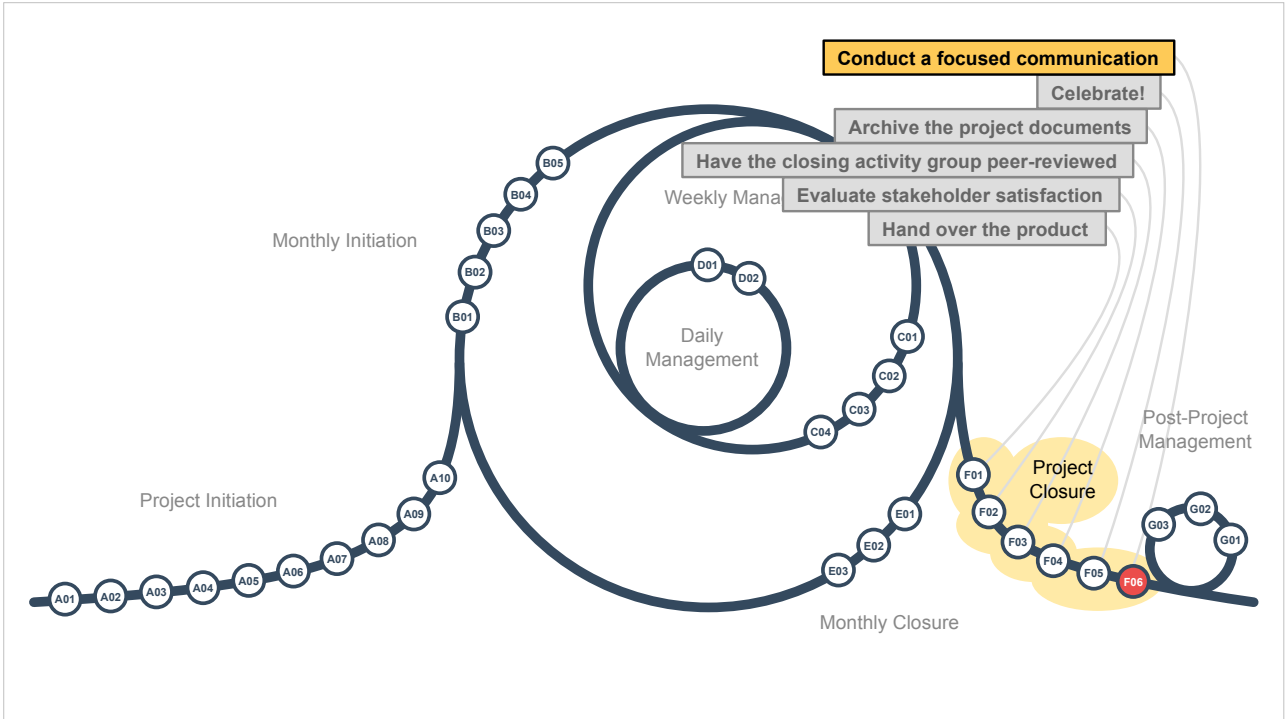


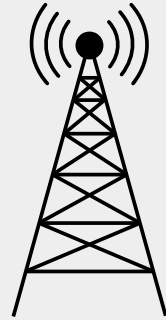
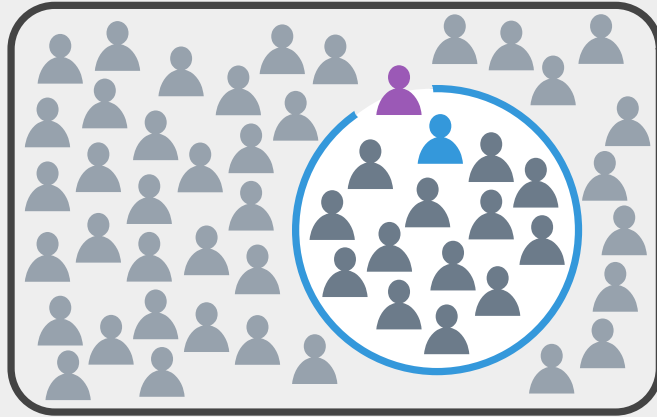


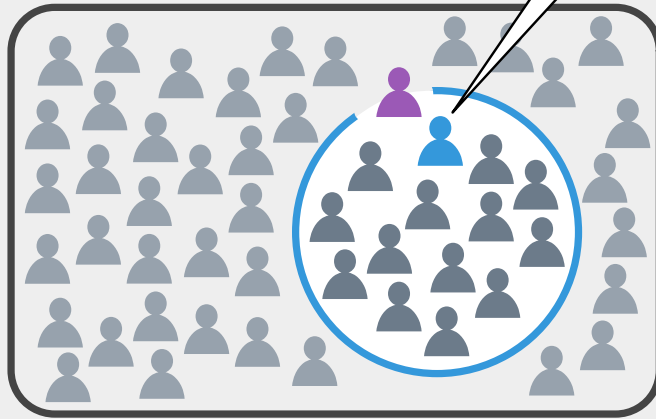


The project is finished, and what we do doesn't change it anymore. However, certain activities, such as celebrating, help improve people's contributions to future projects.

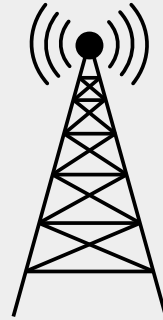
Note: If a project manager lacks the budget and authority to arrange a simple celebration, they have really fundamental problems to worry about!

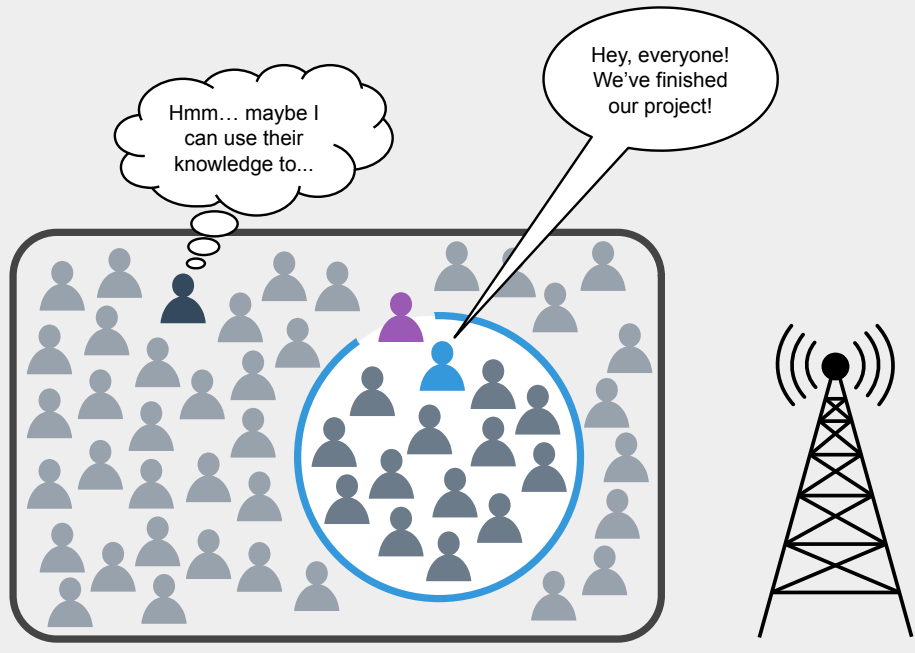


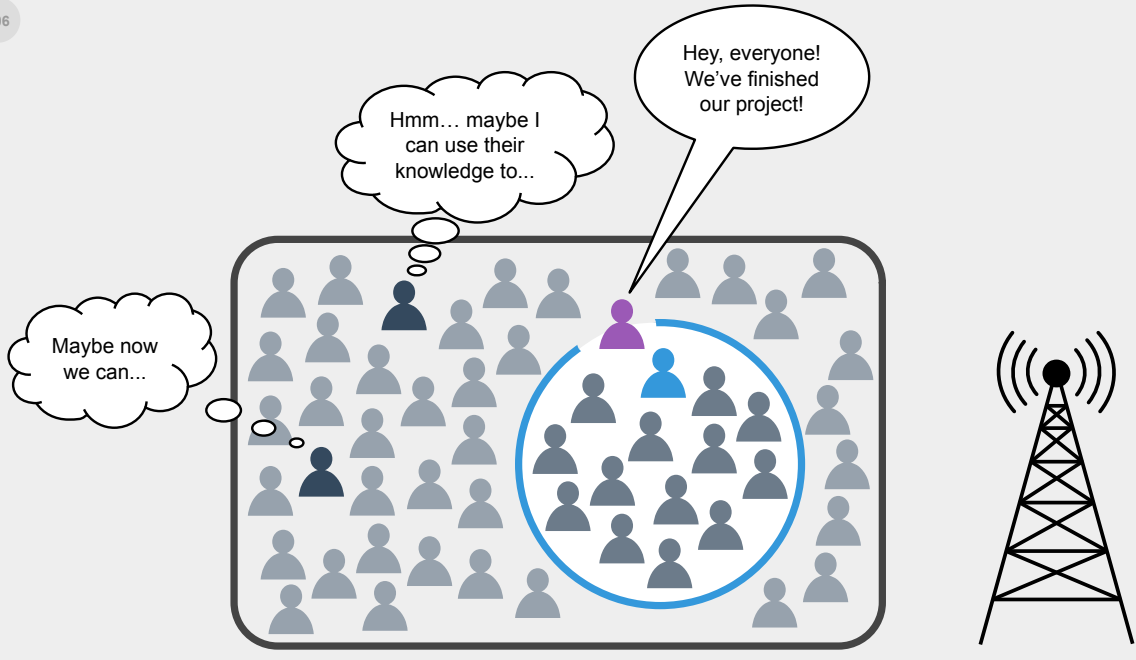


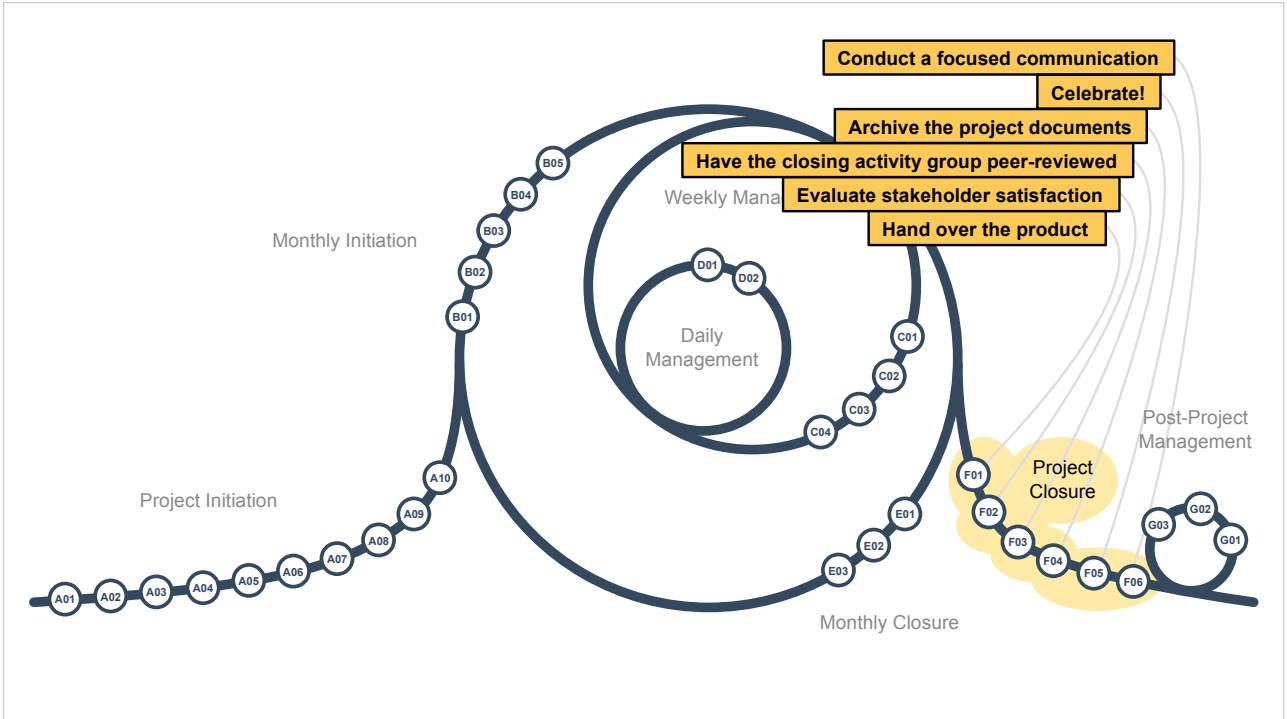


Hey, everyone!
We've finished
our project!









① High-level overview

② Full review

- Ⓐ Project Initiation
- Ⓑ Monthly Initiation
- Ⓒ Weekly Management
- Ⓓ Daily Management
- Ⓔ Monthly Closure
- Ⓕ Project Closure
- Ⓖ Post-Project Management



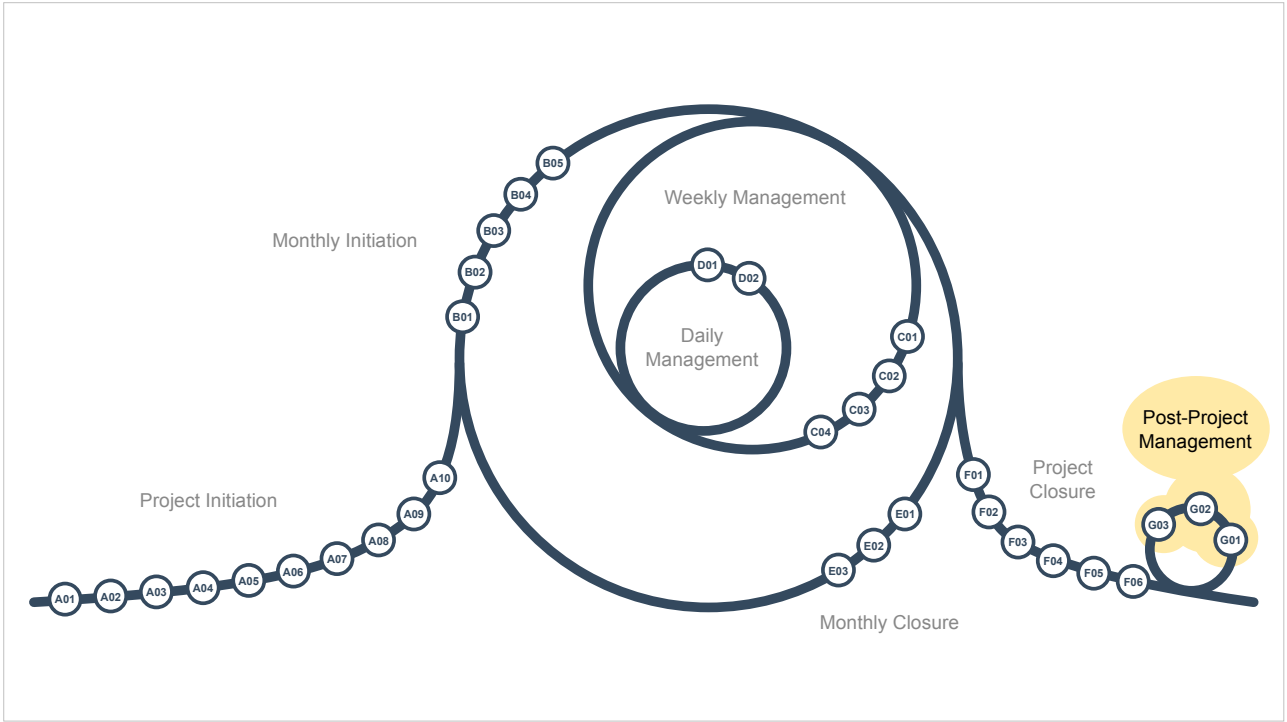
③ NUPP

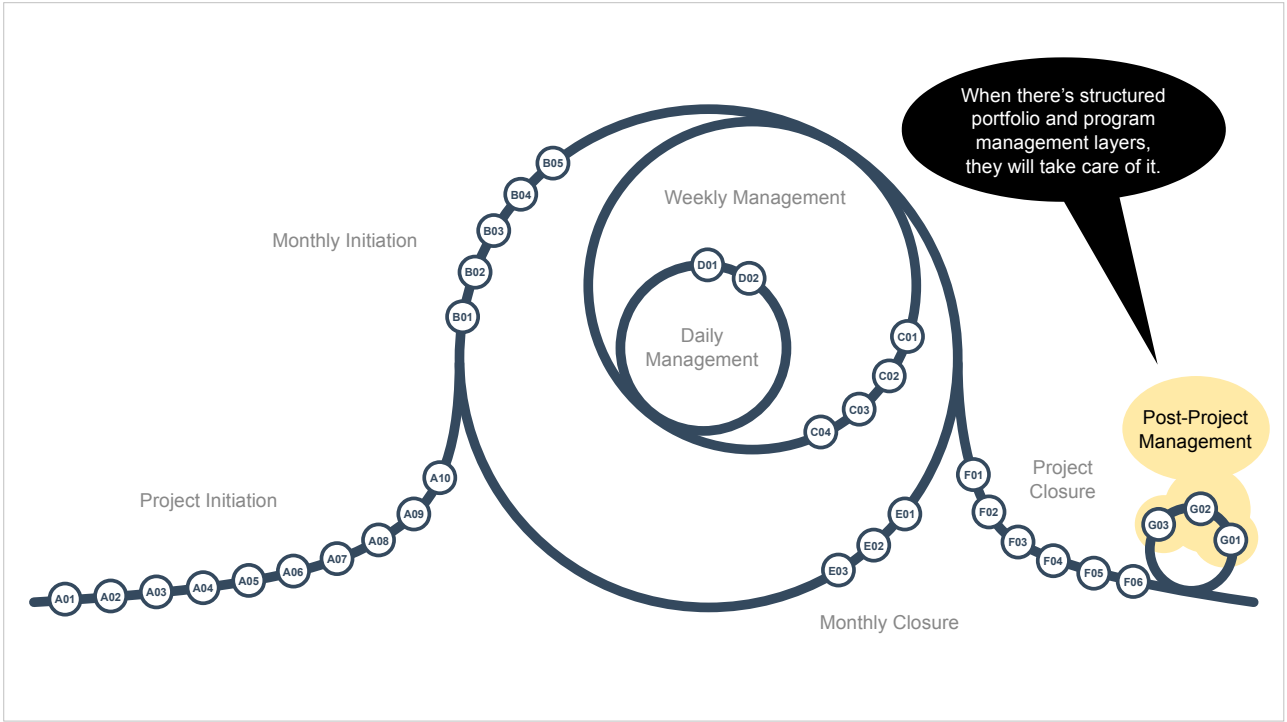
④ Tailoring

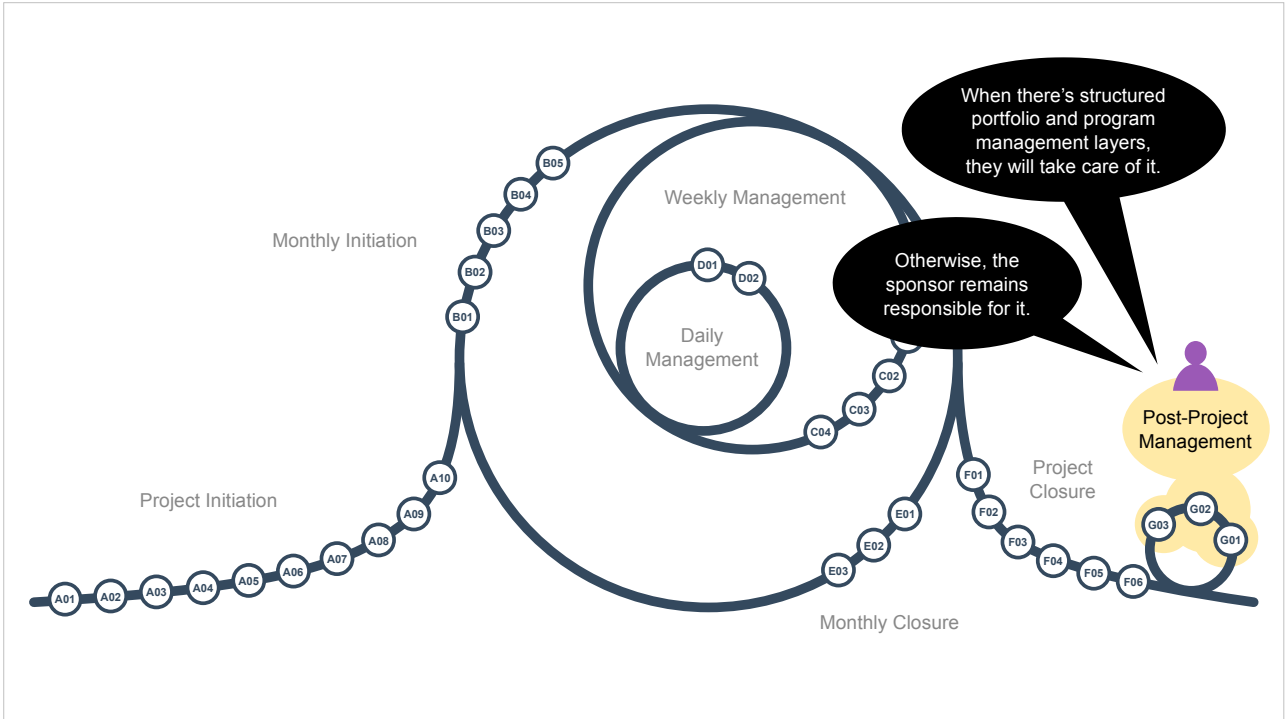
⑤ Development methods

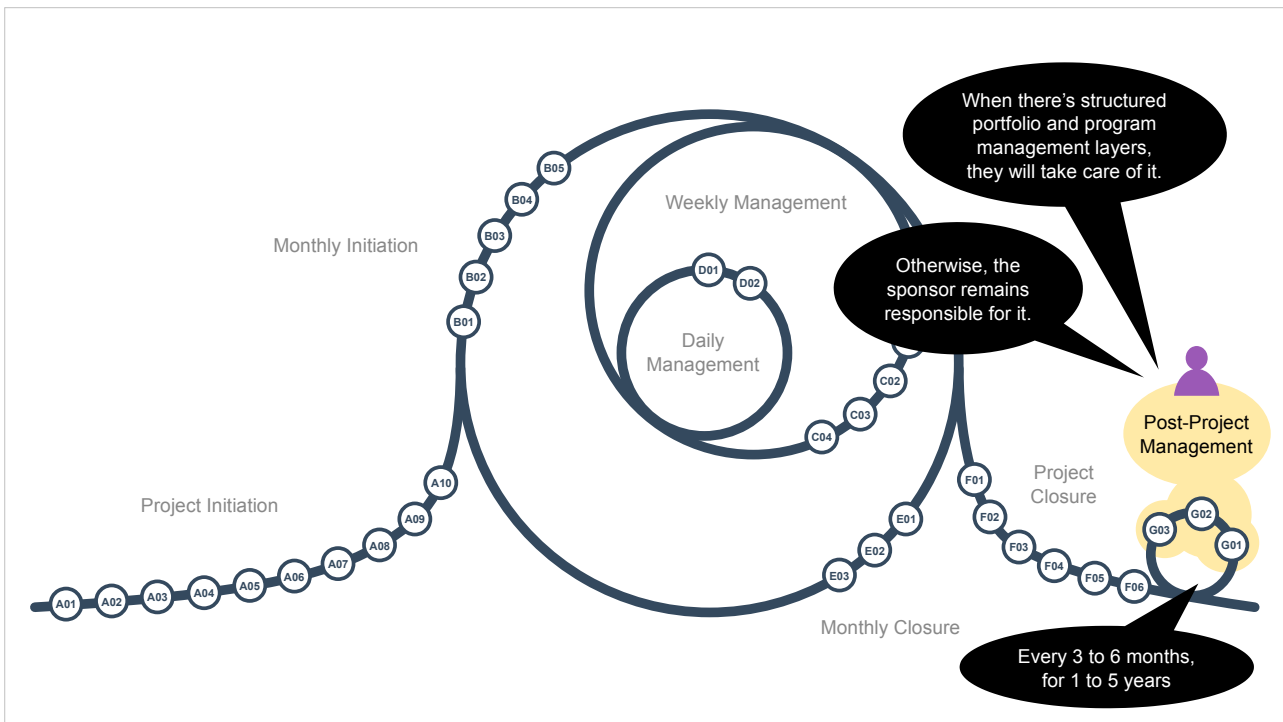
⑥ Code of conduct

⑦ Certification program



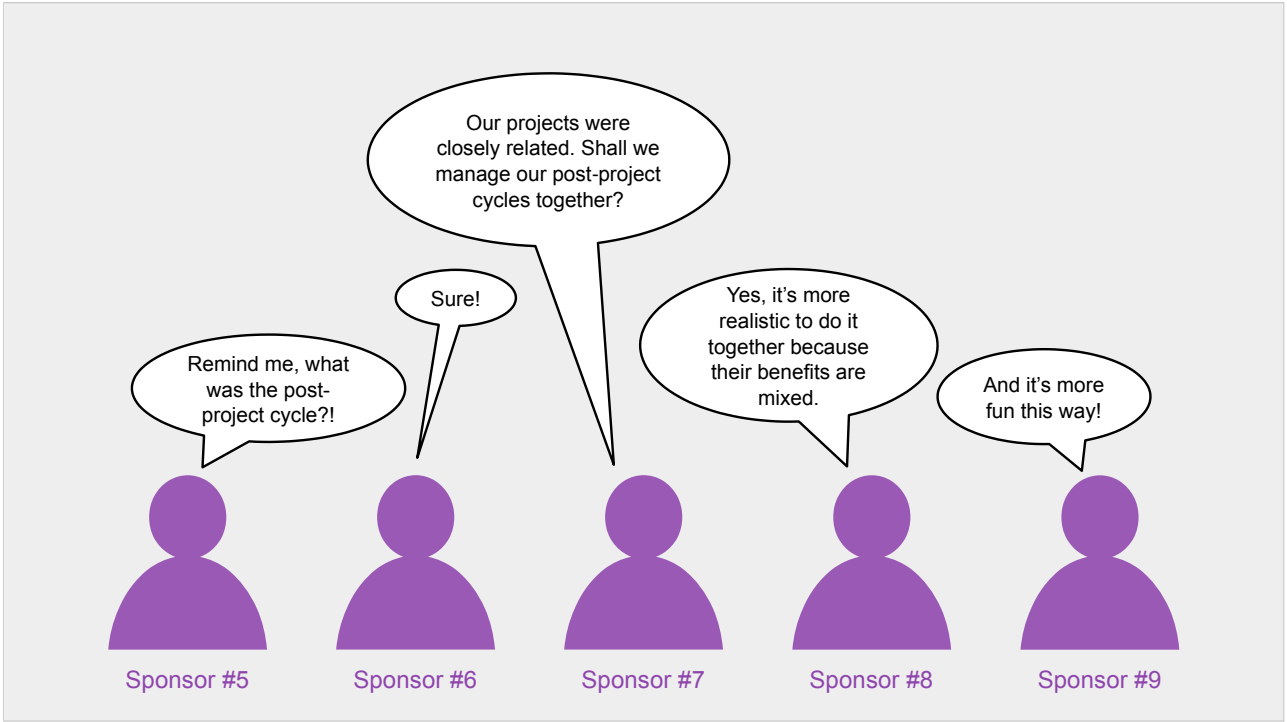






The Post-Project Management cycle is outside the project's boundaries and wouldn't be included in P3.express in an ideal world. However, since most organizations don't have structured program and portfolio management systems, this cycle is added to ensure we have the minimum required activities.

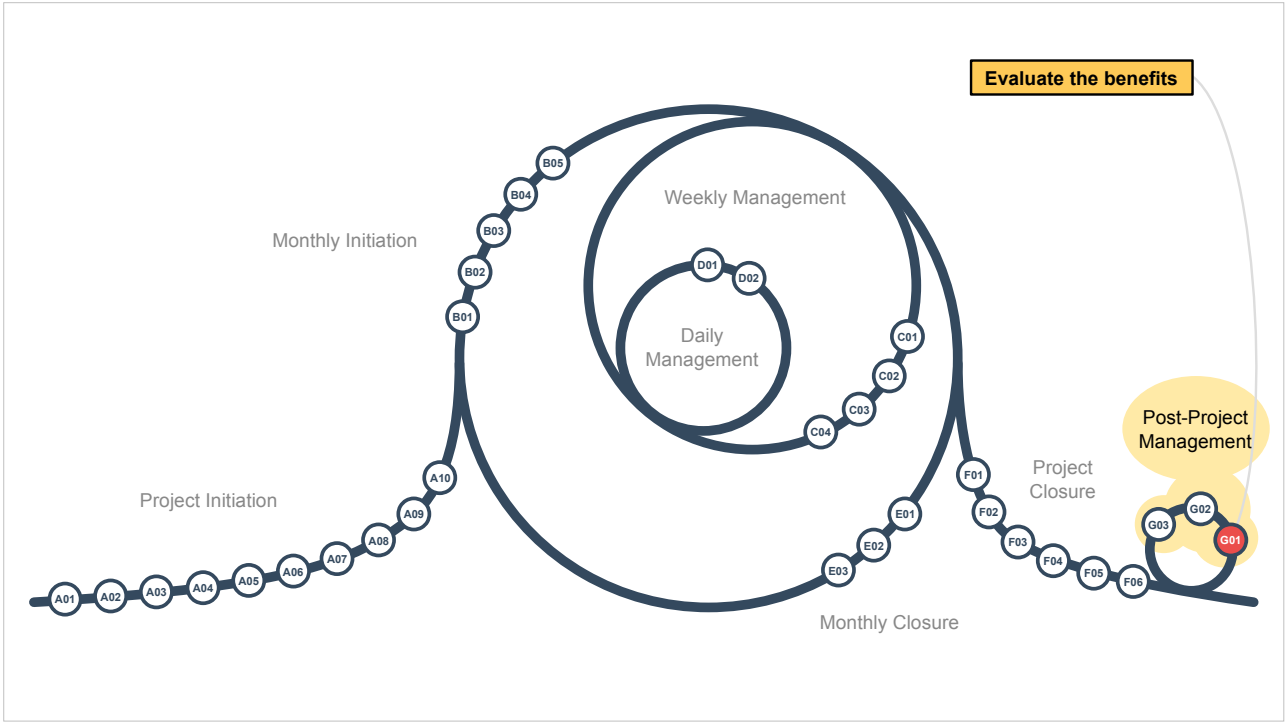
So, if there are structured program and portfolio management systems in an organization, they would cover this cycle (probably in a more elaborate way), and there's no need to worry about it. However, if no such layers exist, the sponsor or someone else in the organization remains responsible for running this cycle.



Give an example of a few projects that need to have combined Post-Project Management cycles.



When multiple projects have been run on a single product, it would be challenging to separate the contribution of various projects to the overall benefits. Therefore, it's a good idea to merge their Post-Project Management cycles.

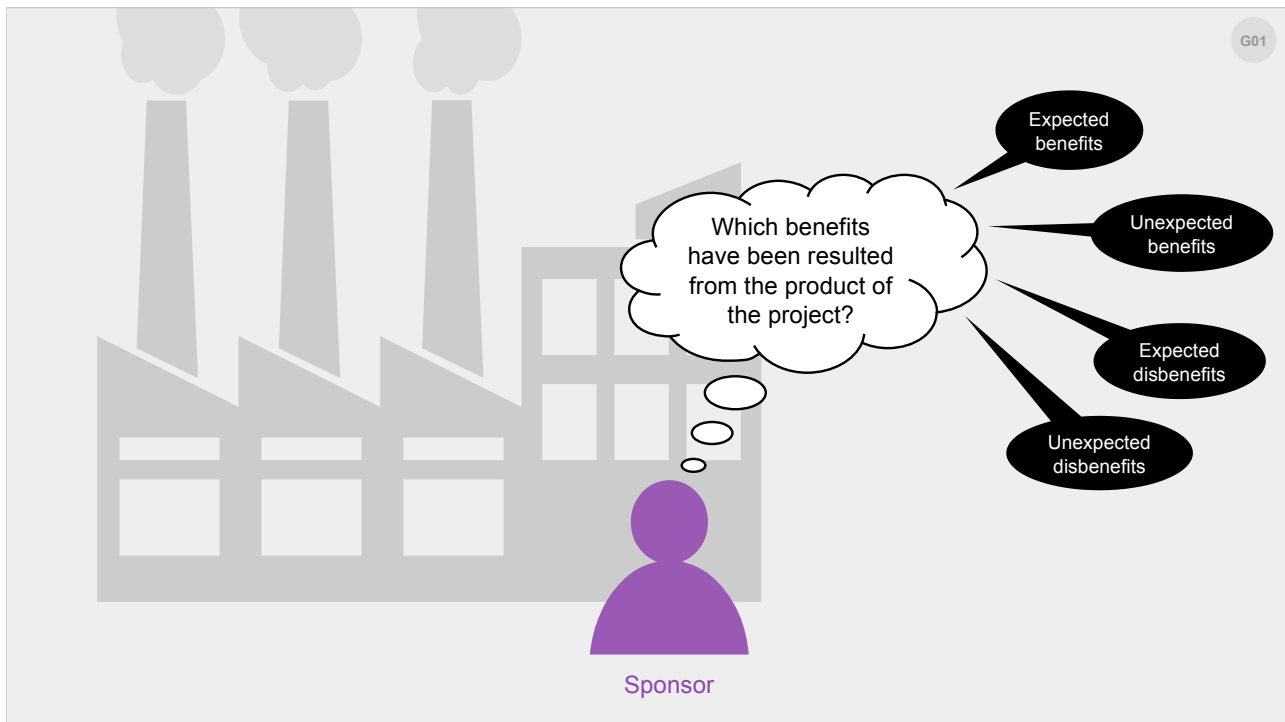




Sponsor

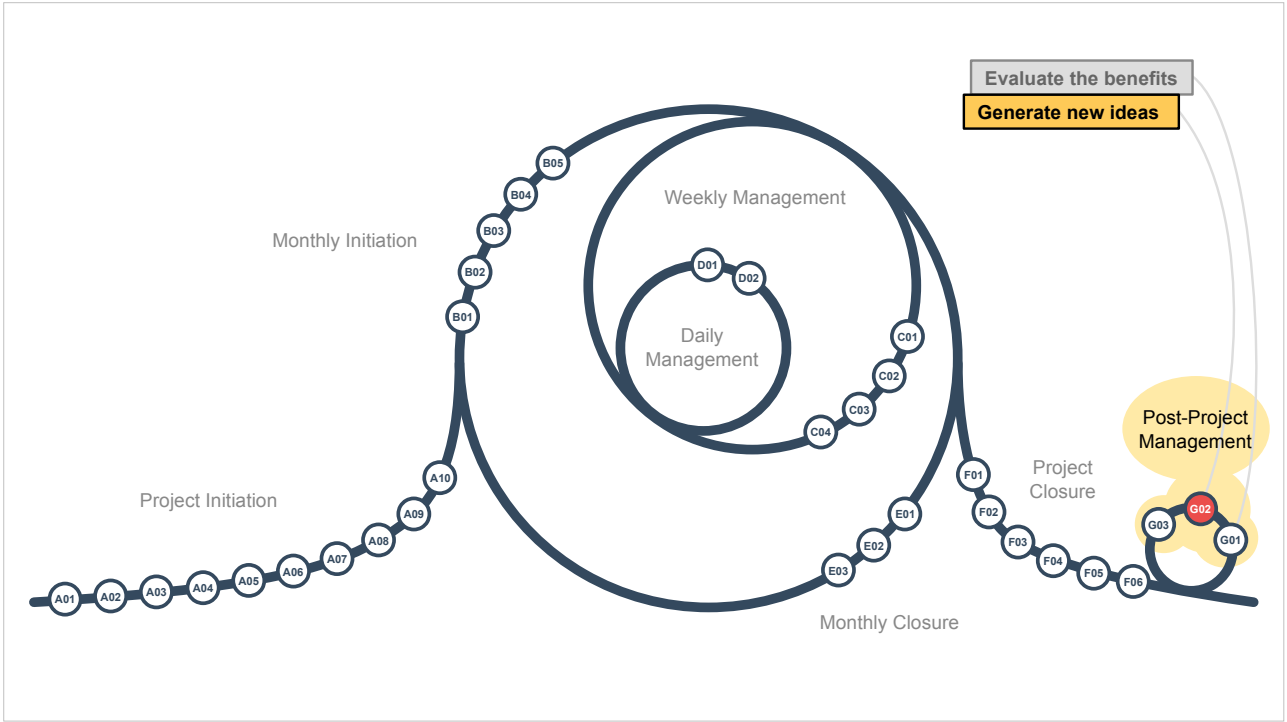


Sponsor



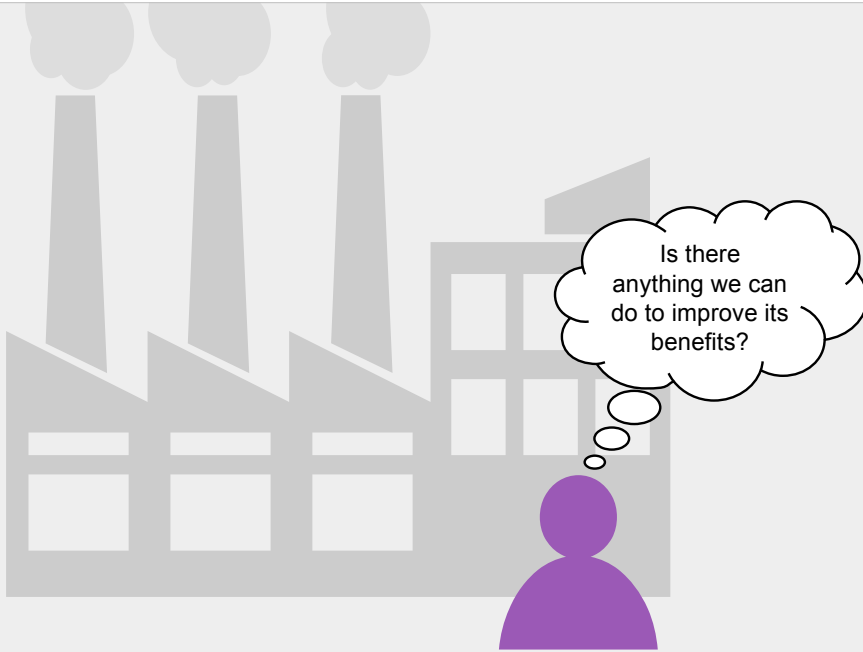
It's easier to judge the benefits of a project that has created a new product than one that has changed an existing product.

However, it may be helpful to note that the benefits of the output of any project are mixed with everything else in the environment; other projects, other operations, management style, etc. For example, if you have a small company and develop an innovative web application, you may earn 200 Artopools per month and a few other benefits. However, imagine that the very same app is developed in one of the big, famous IT companies: In that case, the same output would generate hundreds or thousands of times more benefits, even though it's the exact same product.





Sponsor



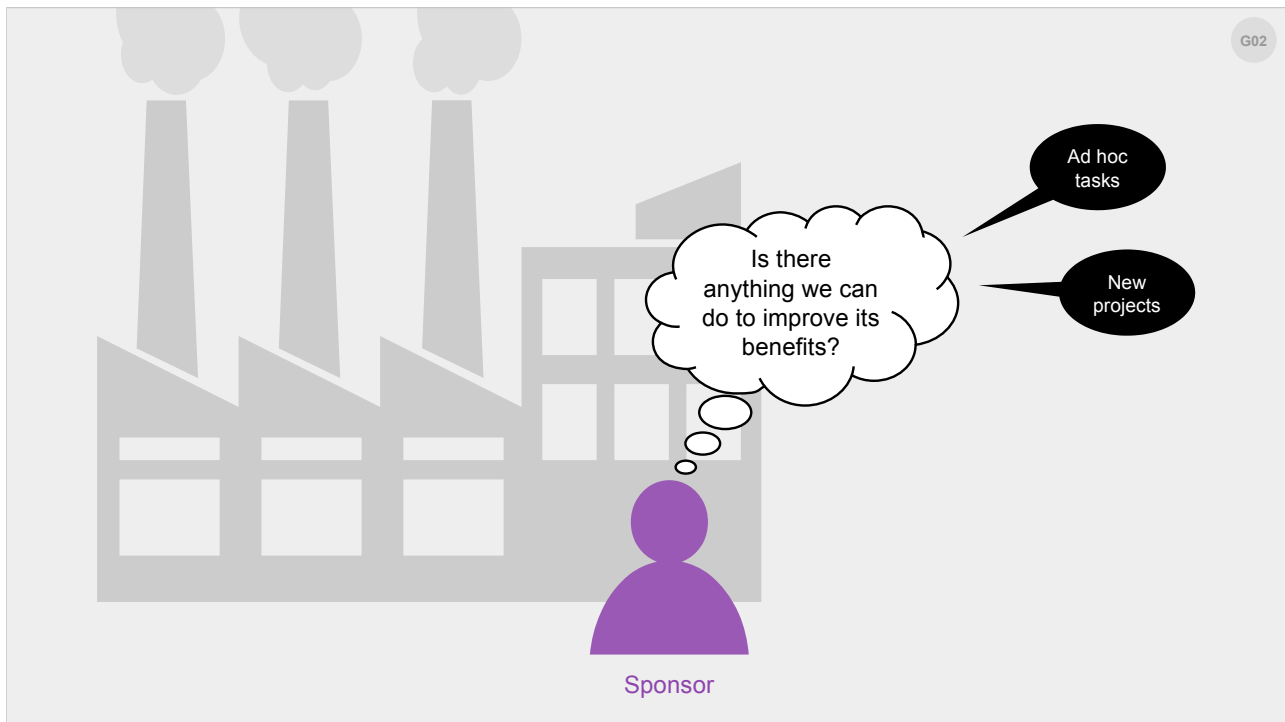
Sponsor



Sponsor

Is there anything we can do to improve its benefits?

Ad hoc tasks



Here are a few examples of ad hoc tasks:

- We can publish an article and showcase our project. That would give us more exposure and improve our reputation.
- It's a lovely building, but it's become dirty in the last two years; a coat of paint would make it look a lot better, which, in turn, would create a better image for this monumental building and, hopefully, attract more customers for us in the future.

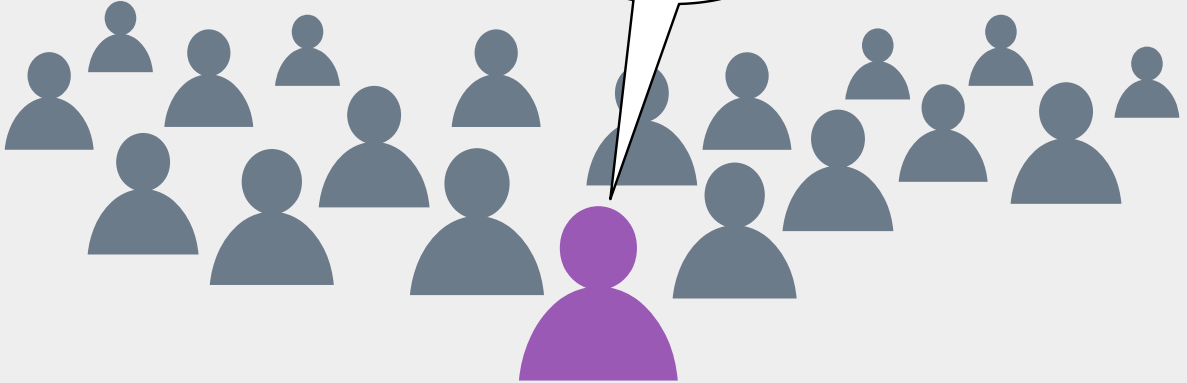
A few project ideas:

- The web application we created works wonderfully. Other organizations like us would be interested in having something like this. What if we create a generic version of it and start selling it to other companies?
- Our project that created the infrastructure for educating poor children worked well. However, now we can see that the next weakest link is the parents. How about creating the capacity for educating their parents?



Sponsor

How do you think we can enhance benefits of this product?



Sponsor

Wisdom of Crowds

How do you think we can enhance benefits of this product?

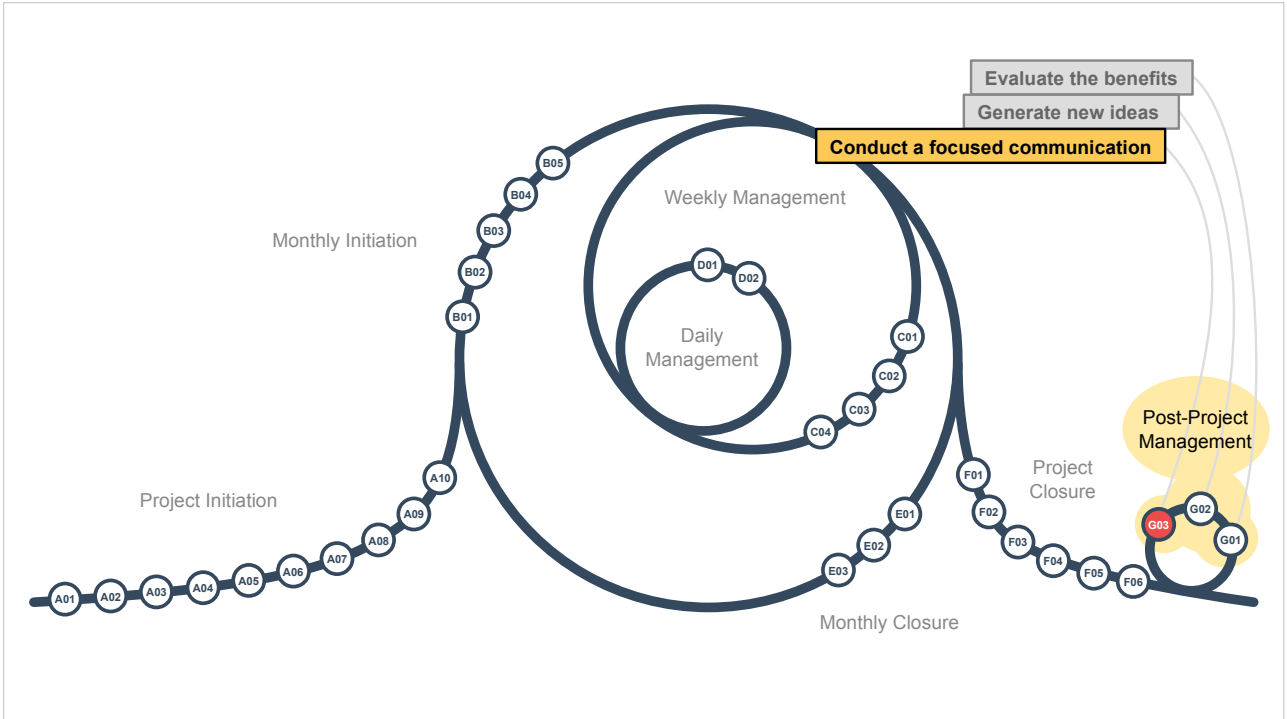


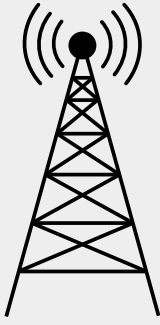
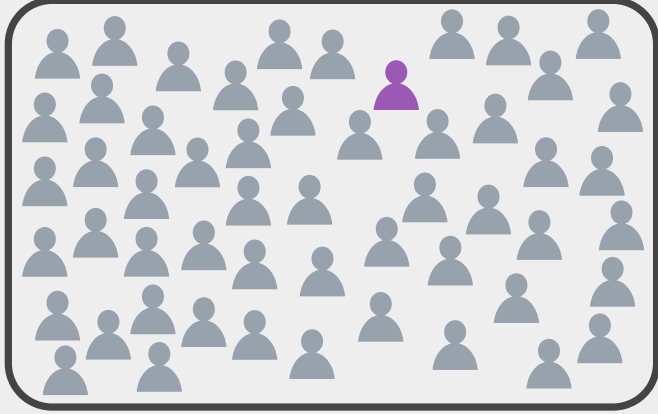
Sponsor

You've finished the project for making the city center bicycle-friendly. Think of a few ad hoc post-project tasks that can improve its benefits.

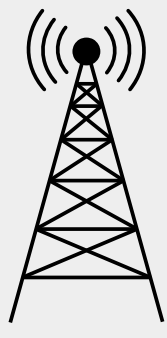
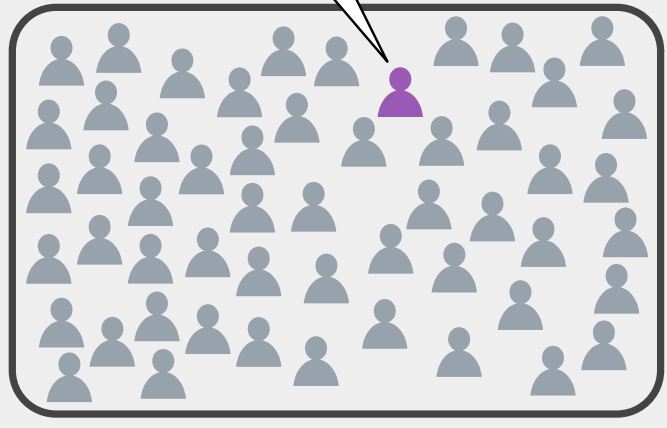


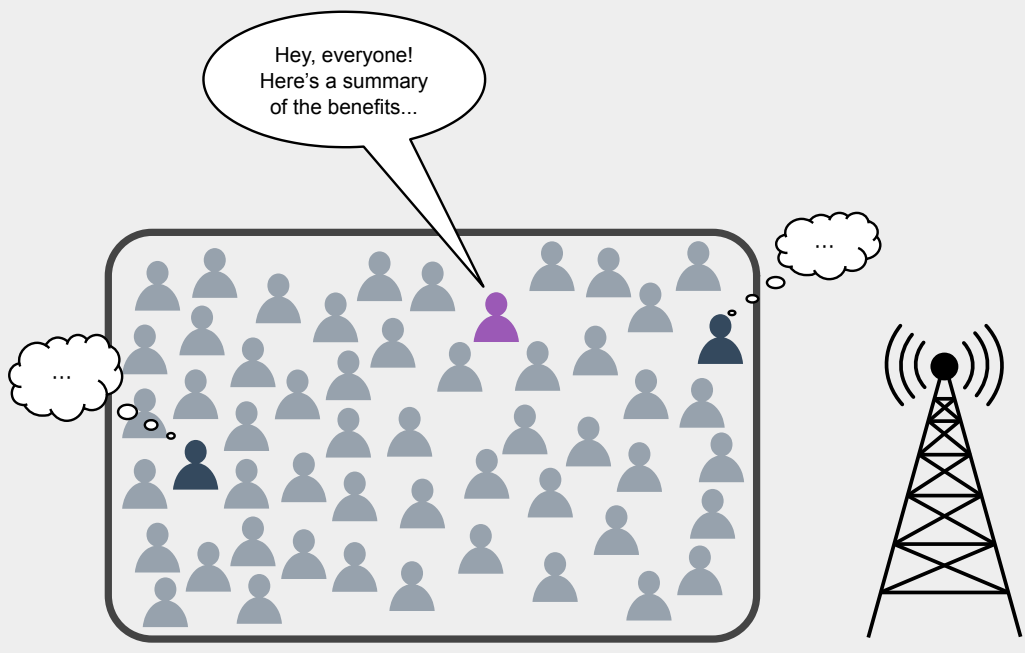
- We can have a free event for businesses to showcase their products and services related to cycling in the city's center. That would encourage people to use the project's output and cycle more.
- We can ask the local newspapers to write articles about the output so that more people become interested in cycling.
- Etc.

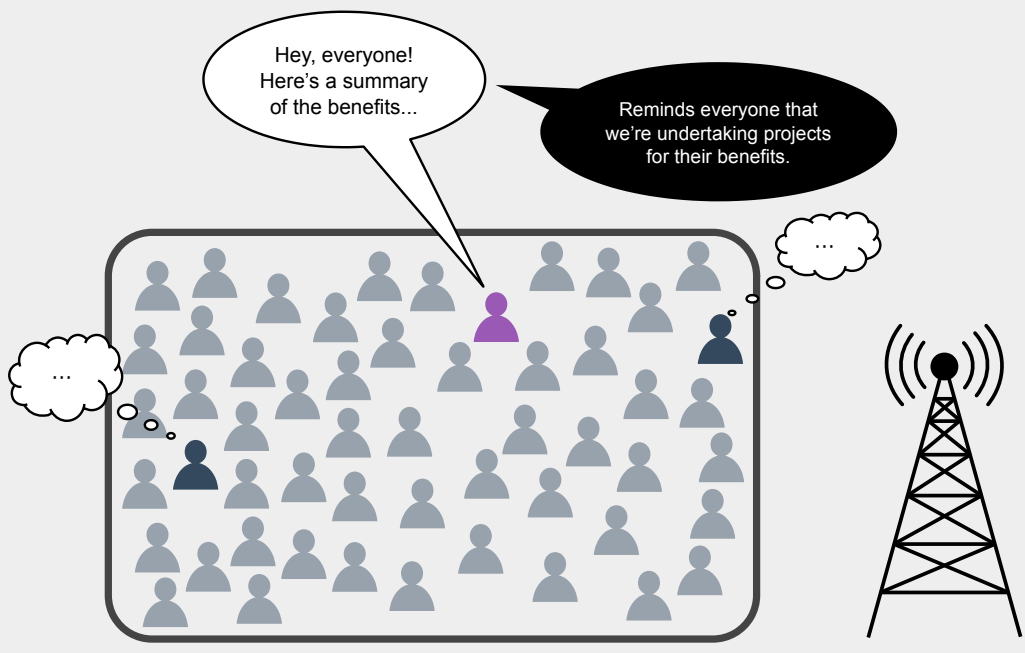


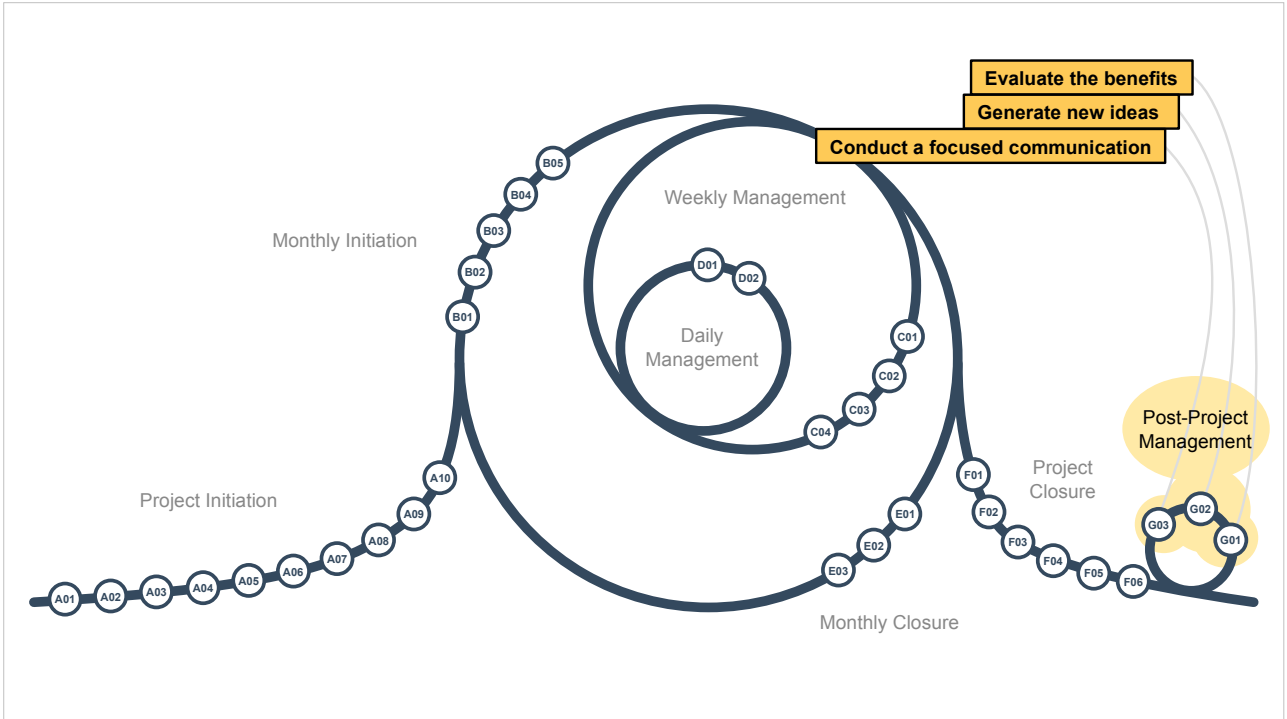


Hey, everyone!
Here's a summary
of the benefits...









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② Full review

Ⓐ Project Initiation

Ⓑ Monthly Initiation

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Ⓓ Daily Management

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Ⓖ Post-Project Management



③ NUPP

④ Tailoring

⑤ Development methods

⑥ Code of conduct

⑦ Certification program



It's up to you to decide how detailed you want this section to be. Some NUPP examples are suggested here to be reviewed in the course, but you can add or remove them as you like. More information on each example exists at <https://nupp.guide>

NUPP

Nearly Universal Principles of Projects

P3.express should
be interpreted and
implemented using
NUPP



NUPP

Nearly Universal Principles of Projects

Applicable to

- P3.express
- micro.P3.express
- PRINCE2
- DSDM
- Scrum
- XP
- PM²
- PMBOK Guide
- Etc.



NUPP

Nearly Universal Principles of Projects

Examples:

- "Agile vs. waterfall"
- Continuous learning
- Openness

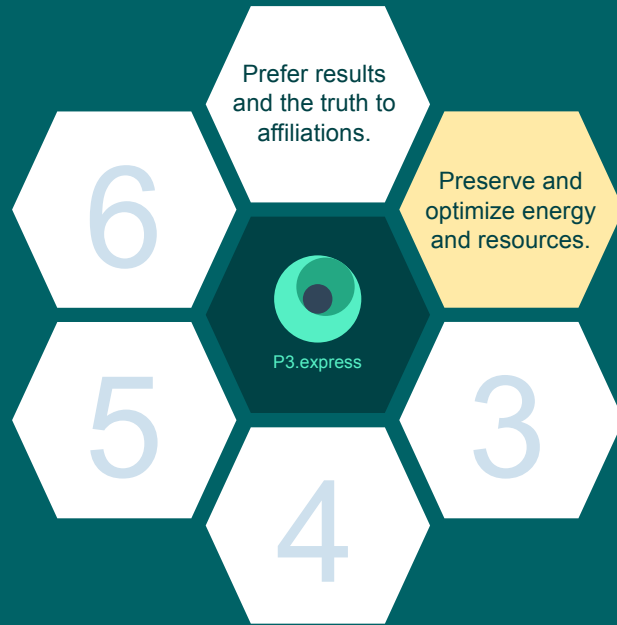


NUPP

Nearly Universal Principles of Projects

Examples:

- The 80/20 rule
- Decision fatigue
- Etc.



NUPP

Nearly Universal Principles of Projects

Examples:

- Risk management
- Critical thinking
- Etc.



NUPP

Nearly Universal Principles of Projects

Examples:

- Deadlines
- Cherry picking
- Etc.



NUPP

Nearly Universal Principles of Projects

Examples:

- “Business case”
- Simplicity
- Tailoring
- Etc.

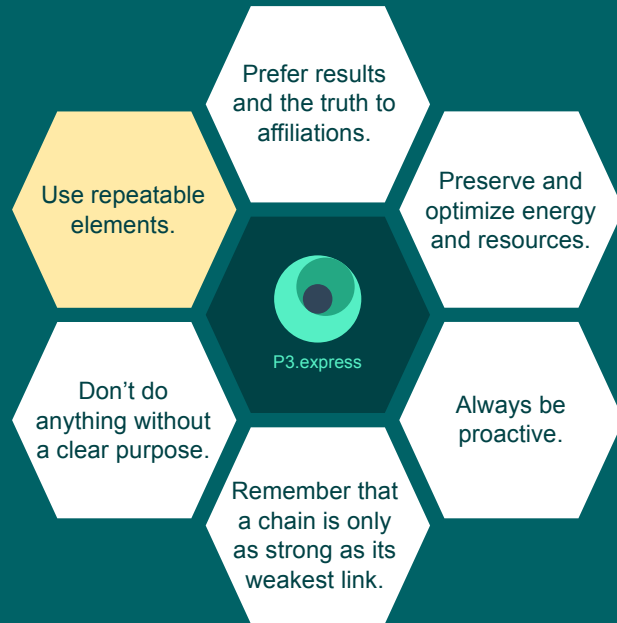


NUPP

Nearly Universal Principles of Projects

Examples:

- Checklists
- Cycles
- Methods
- Etc.



NUPP

Nearly Universal Principles of Projects



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③ NUPP

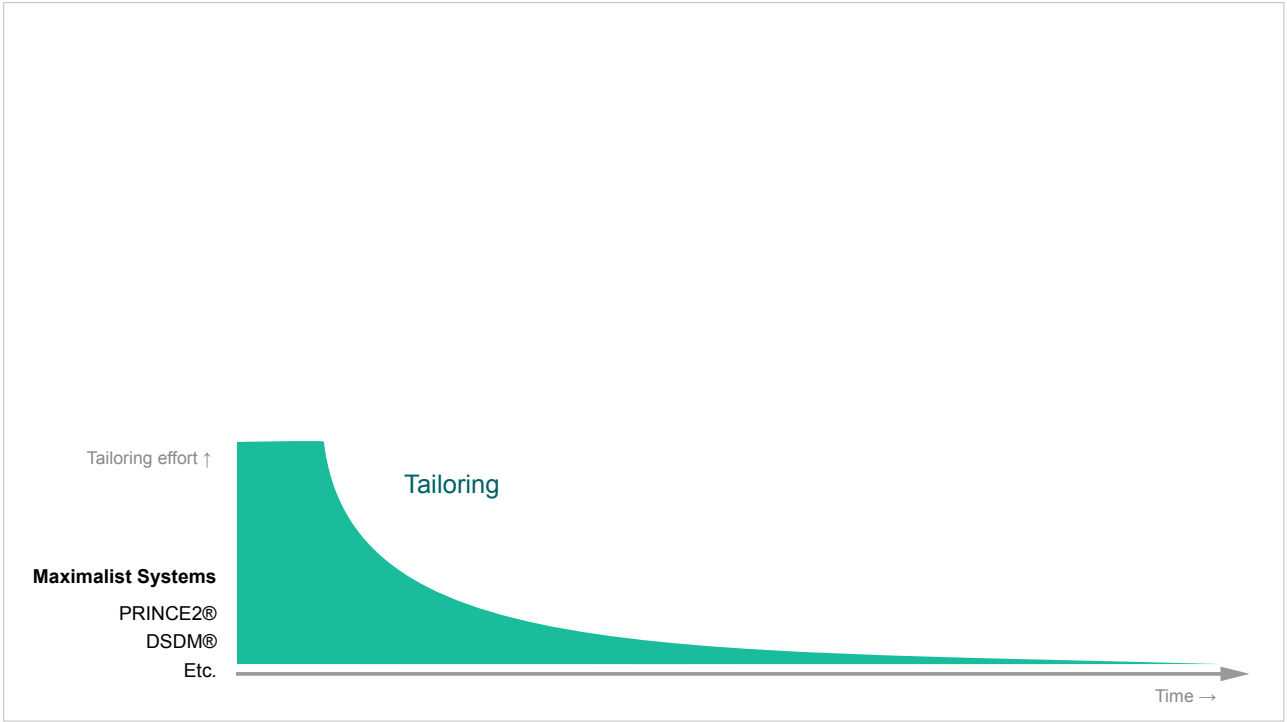


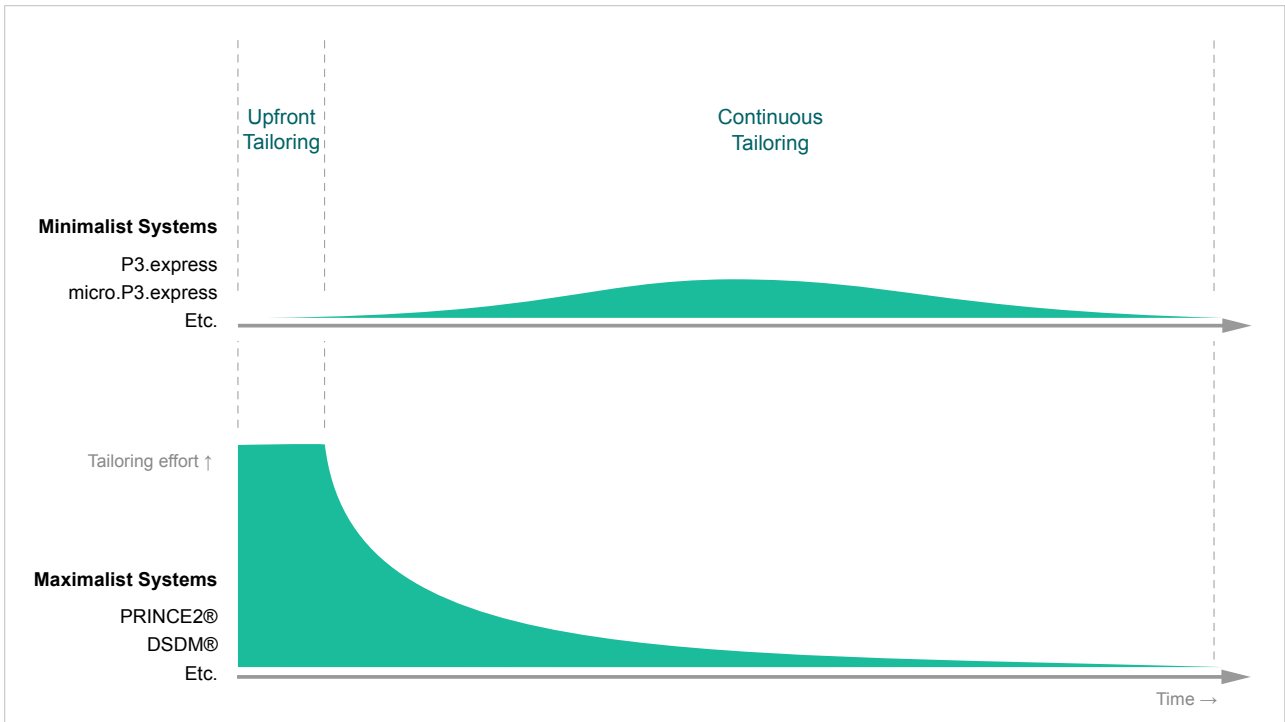
④ Tailoring

⑤ Development methods

⑥ Code of conduct

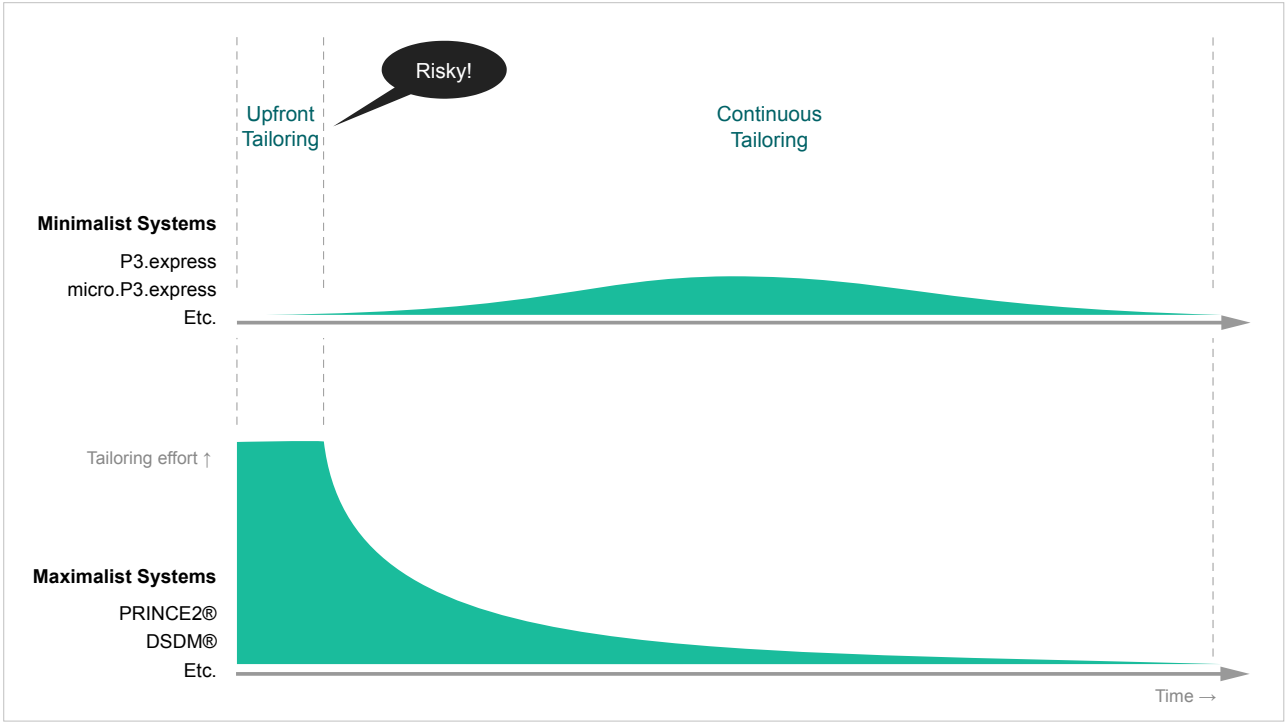
⑦ Certification program

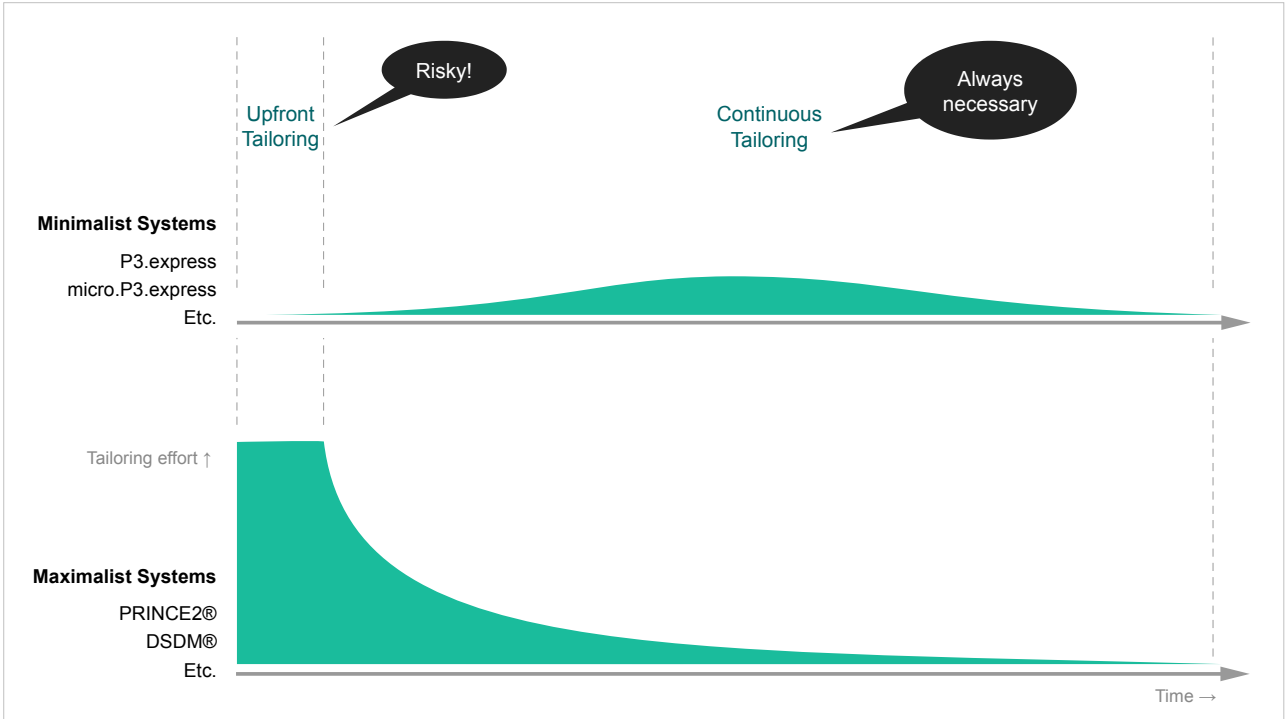


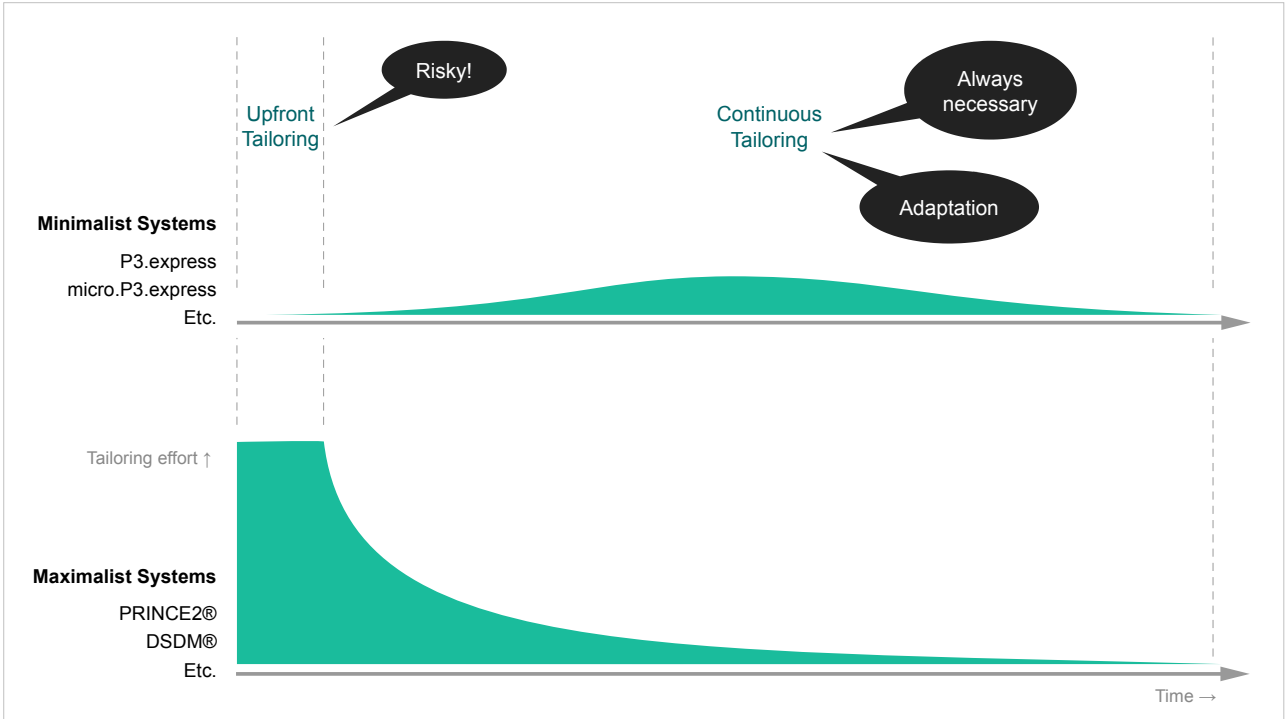


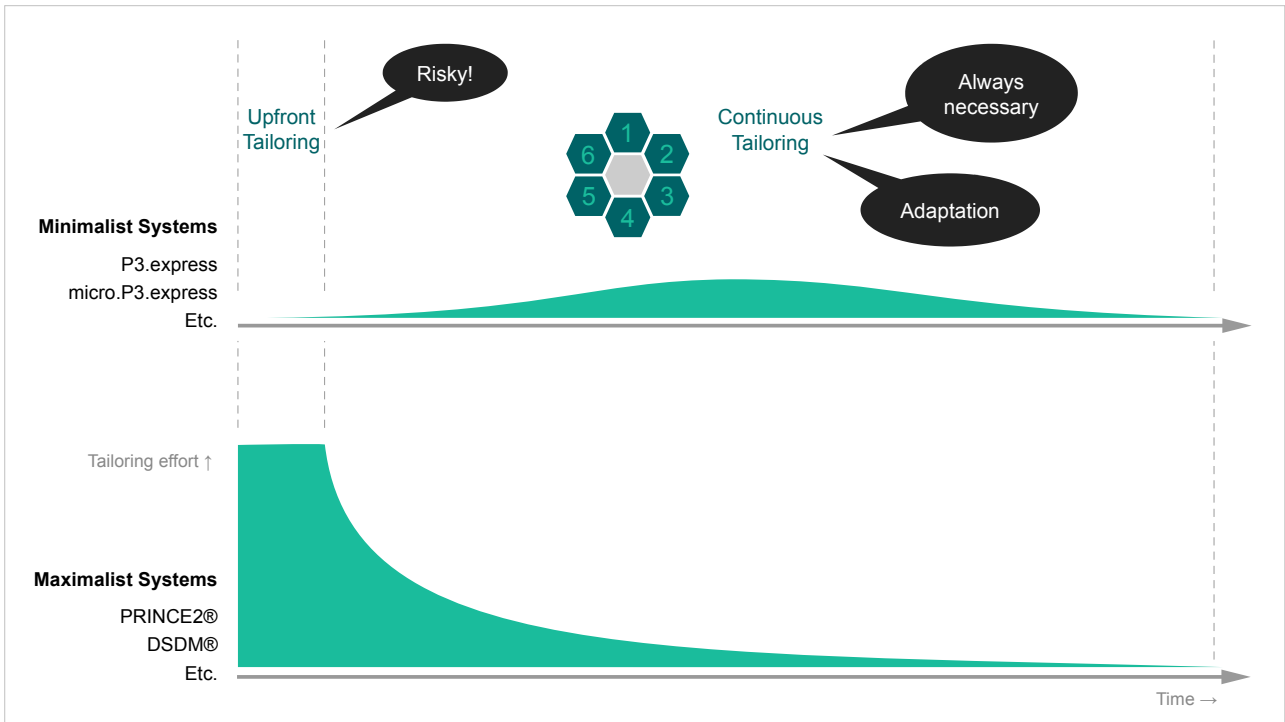
Maximalist systems must have upfront tailoring, whereas minimalist ones don't have to have it, and, in fact, it's best not to tailor P3.express upfront because that has the risk of becoming too idealistic and impractical.

Regardless, both systems should have continuous tailoring to match the project environment.









Everything in P3.express should be interpreted using NUPP. This is also important when the system is being tailored.

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⑤ Development methods

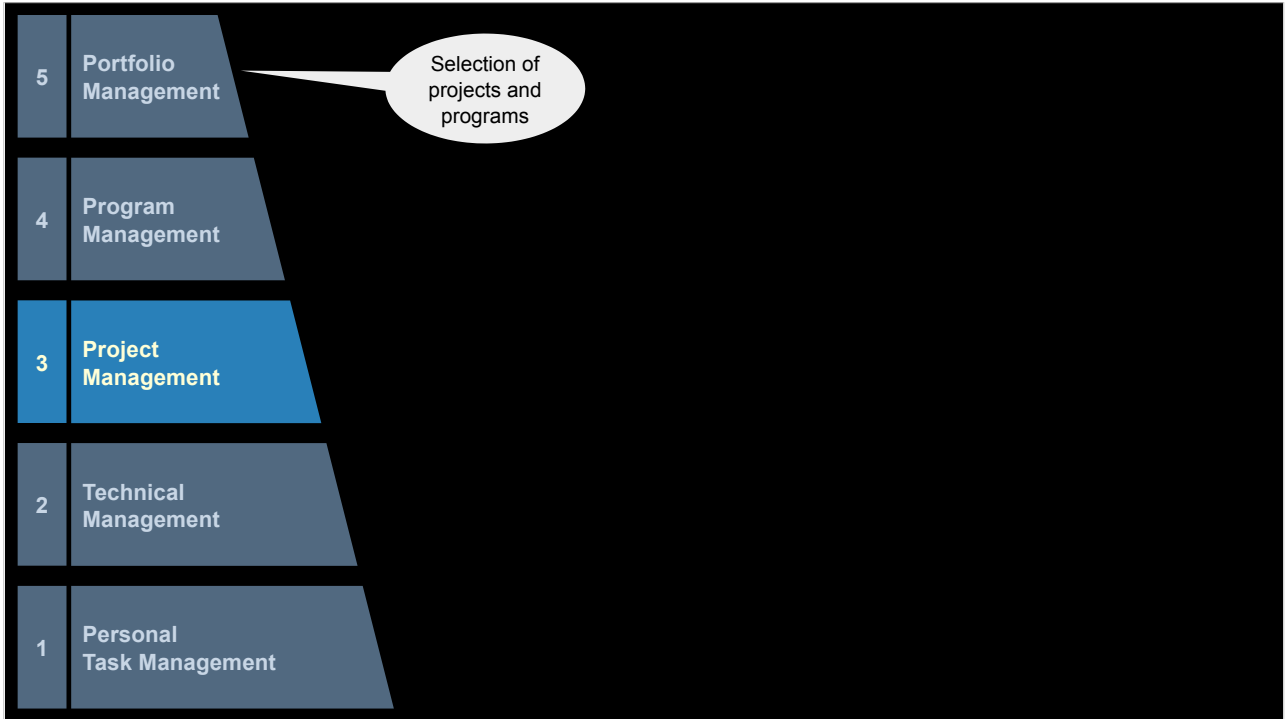
⑥ Code of conduct

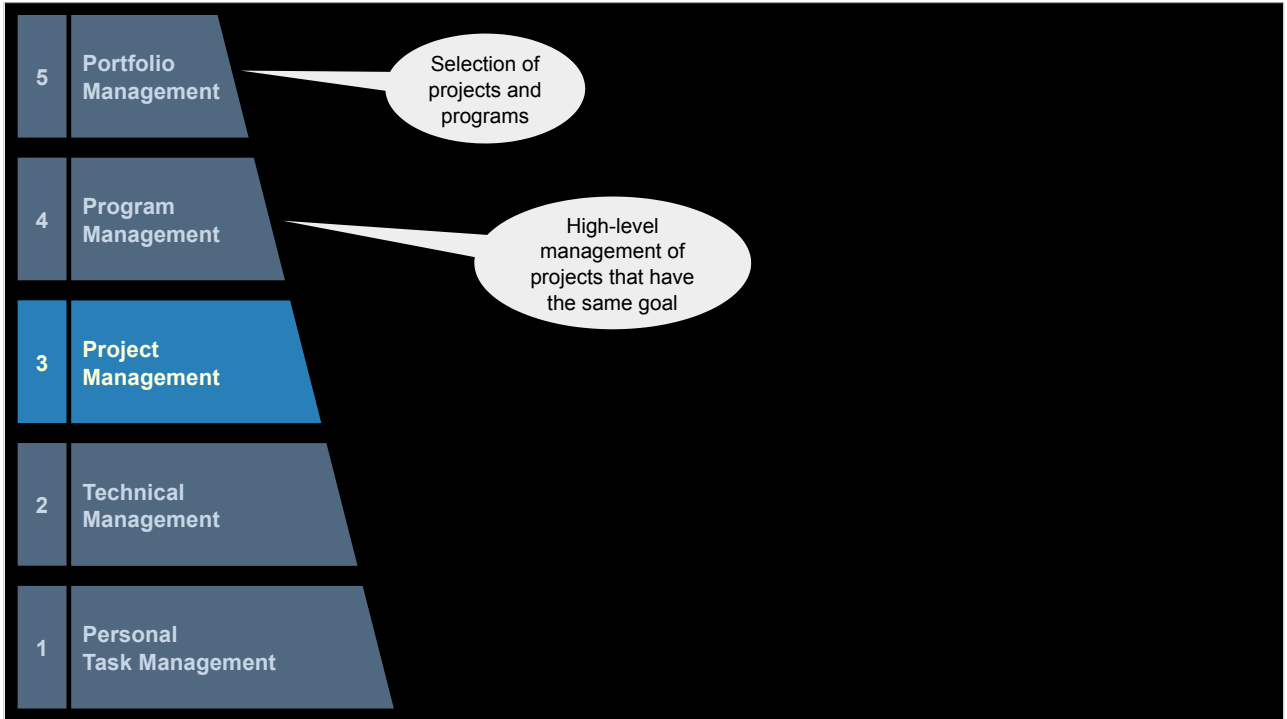
⑦ Certification program

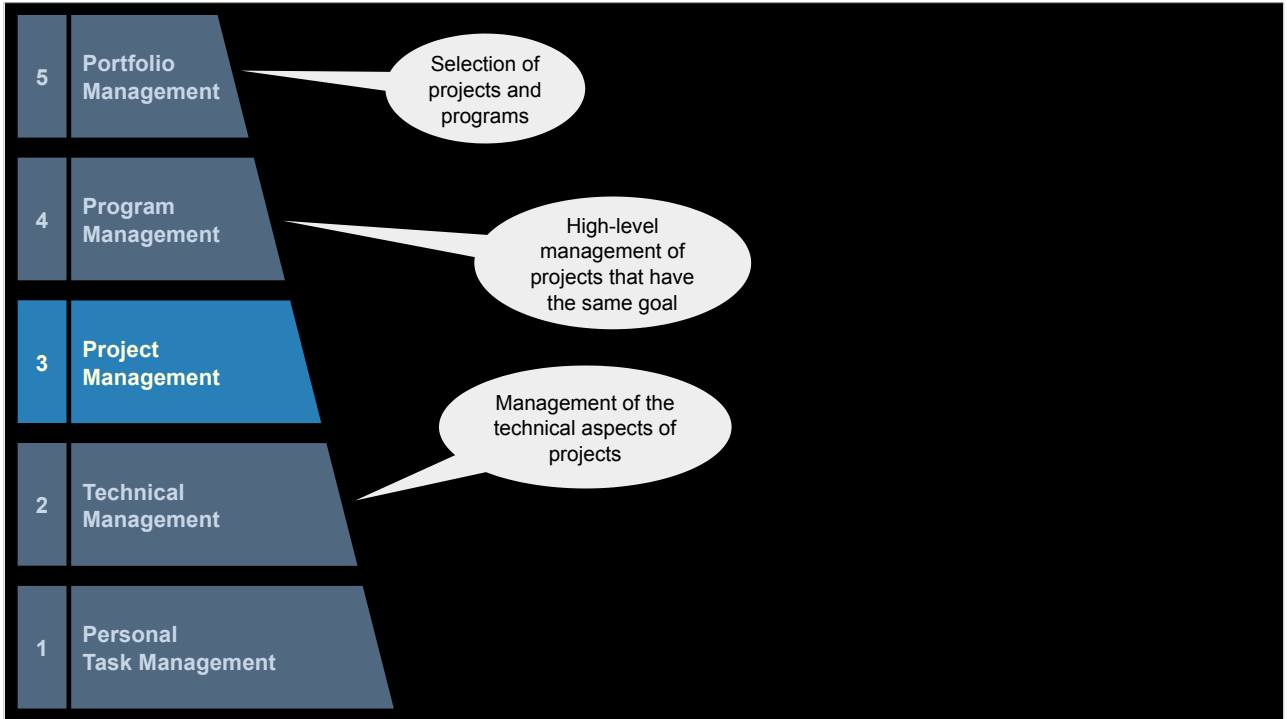


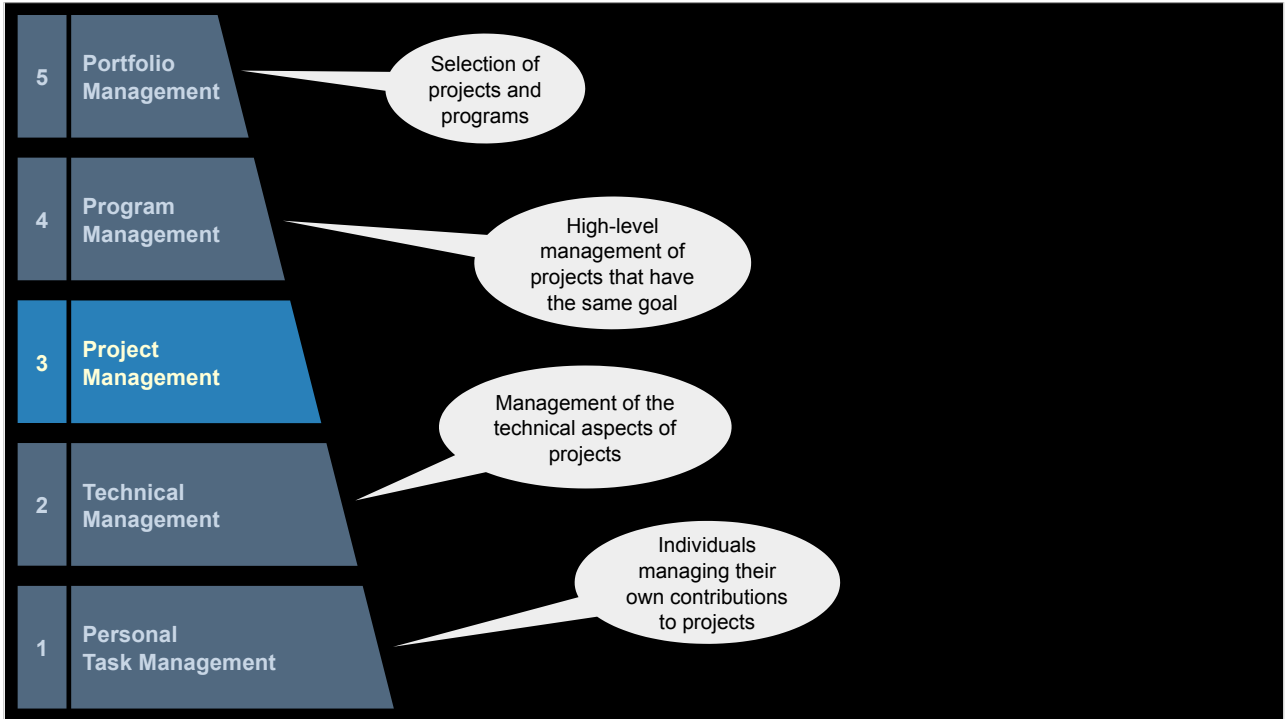


So, here's the answer to the question of where "3" in P3.express comes from ;)

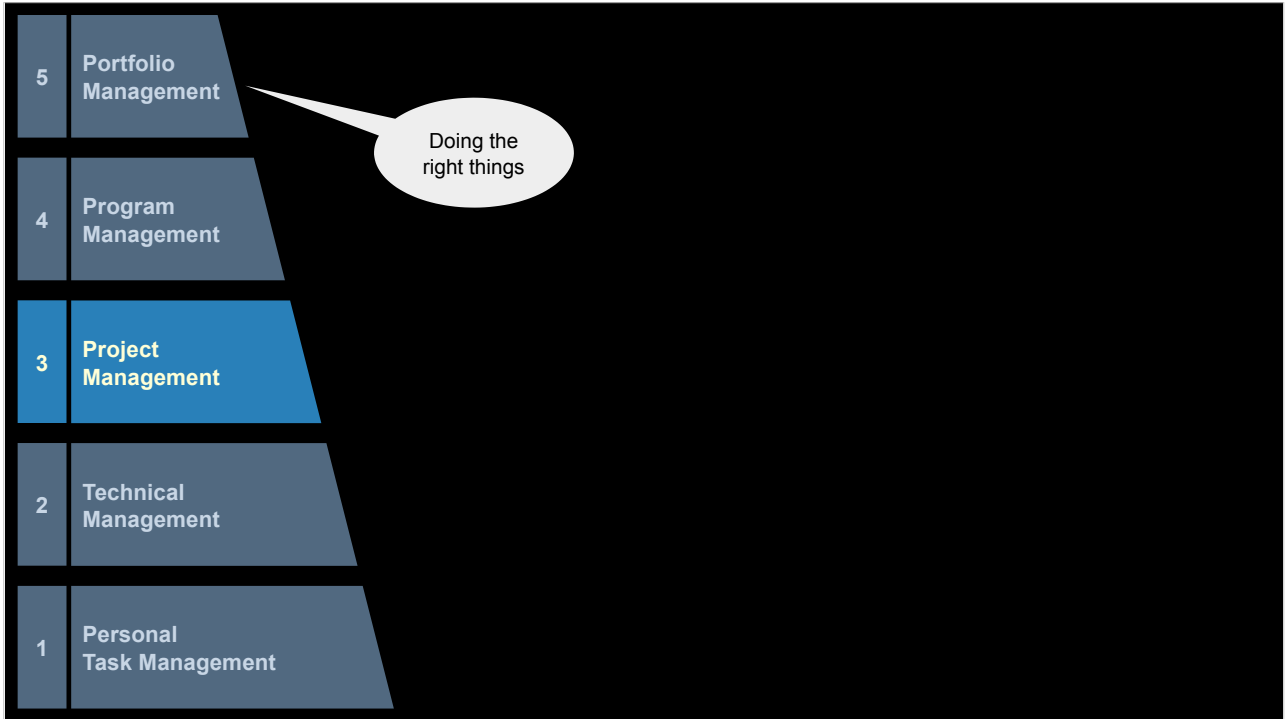


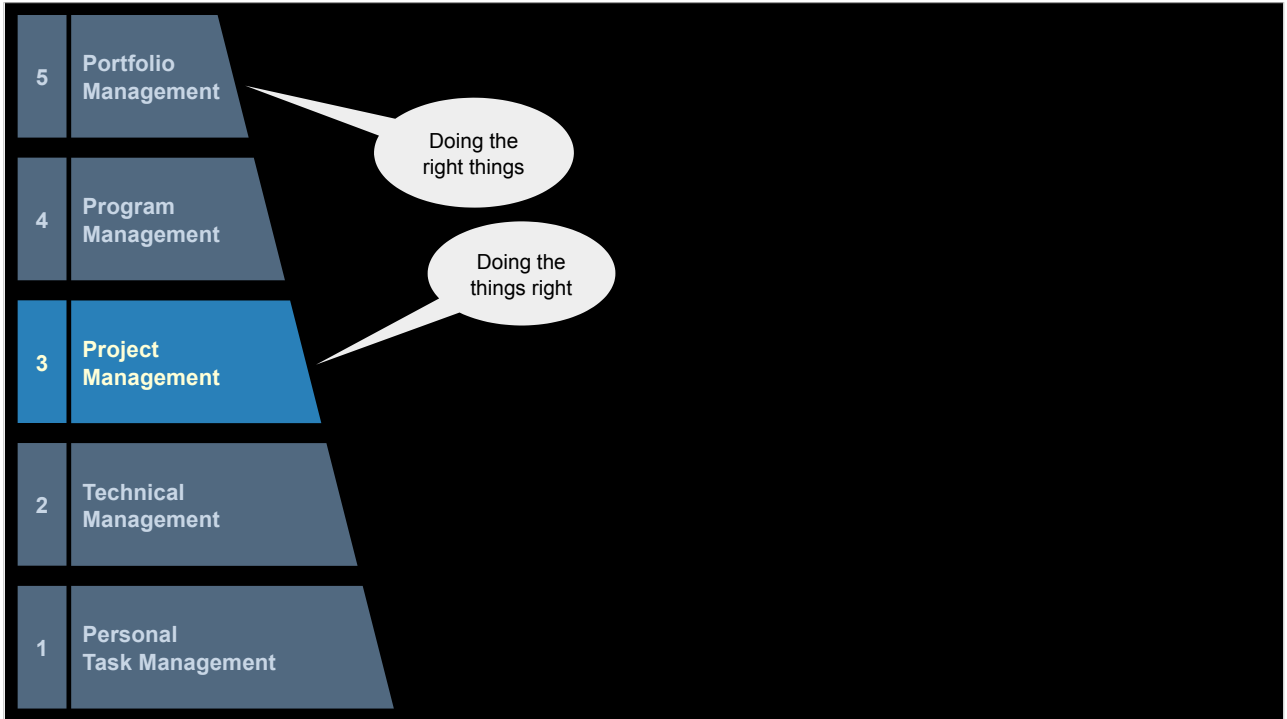




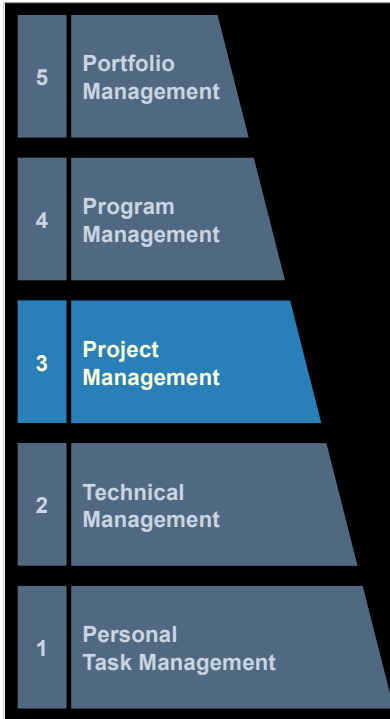




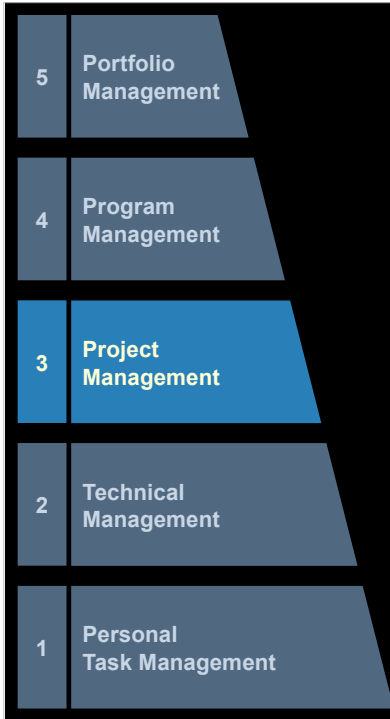






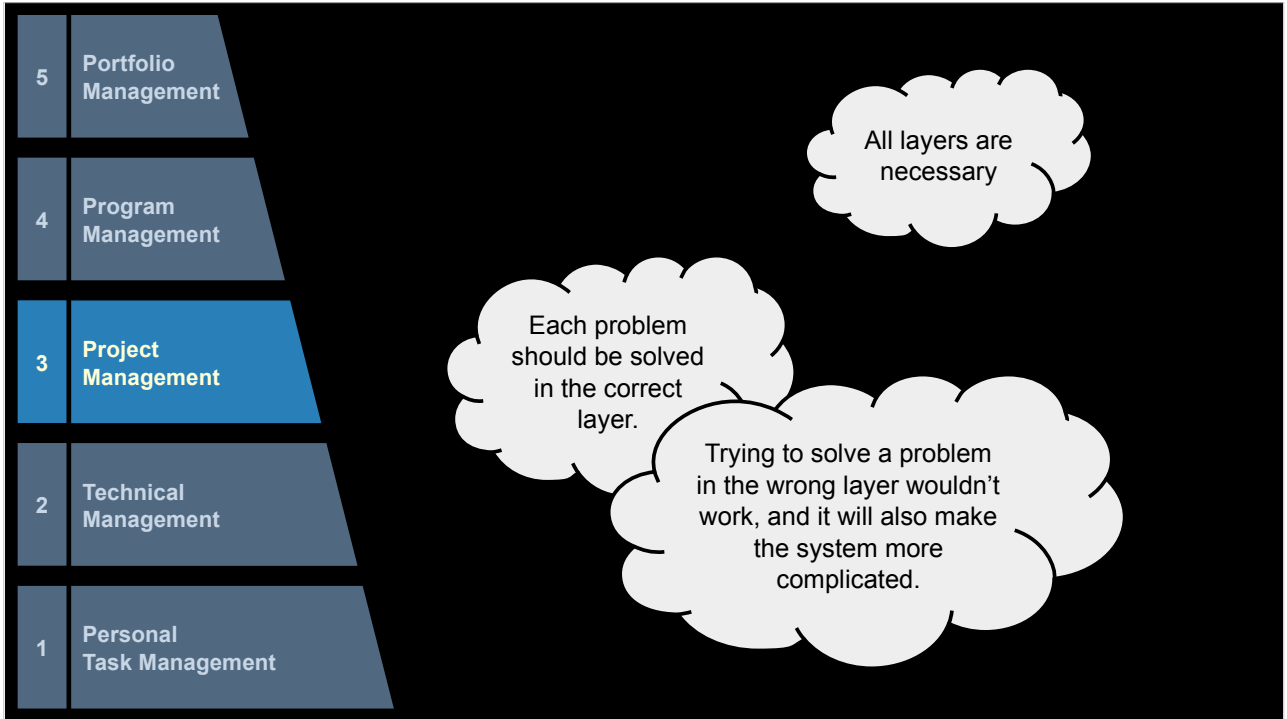


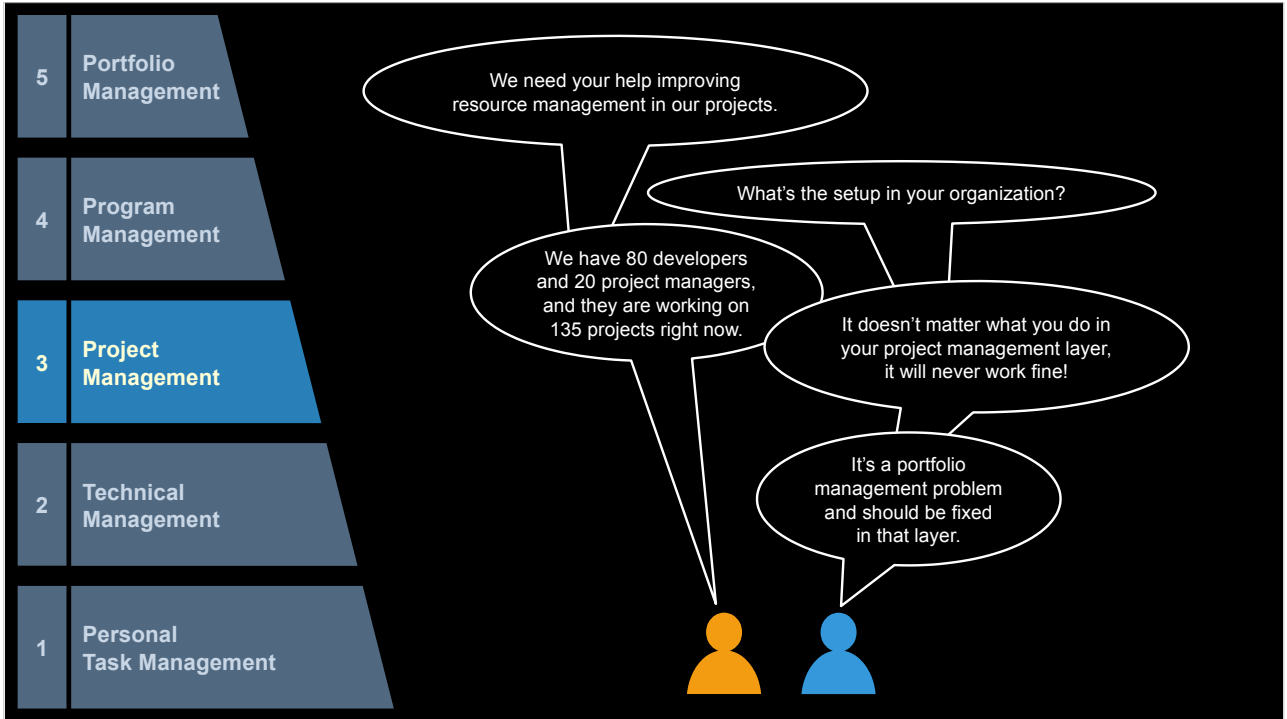
All layers are necessary

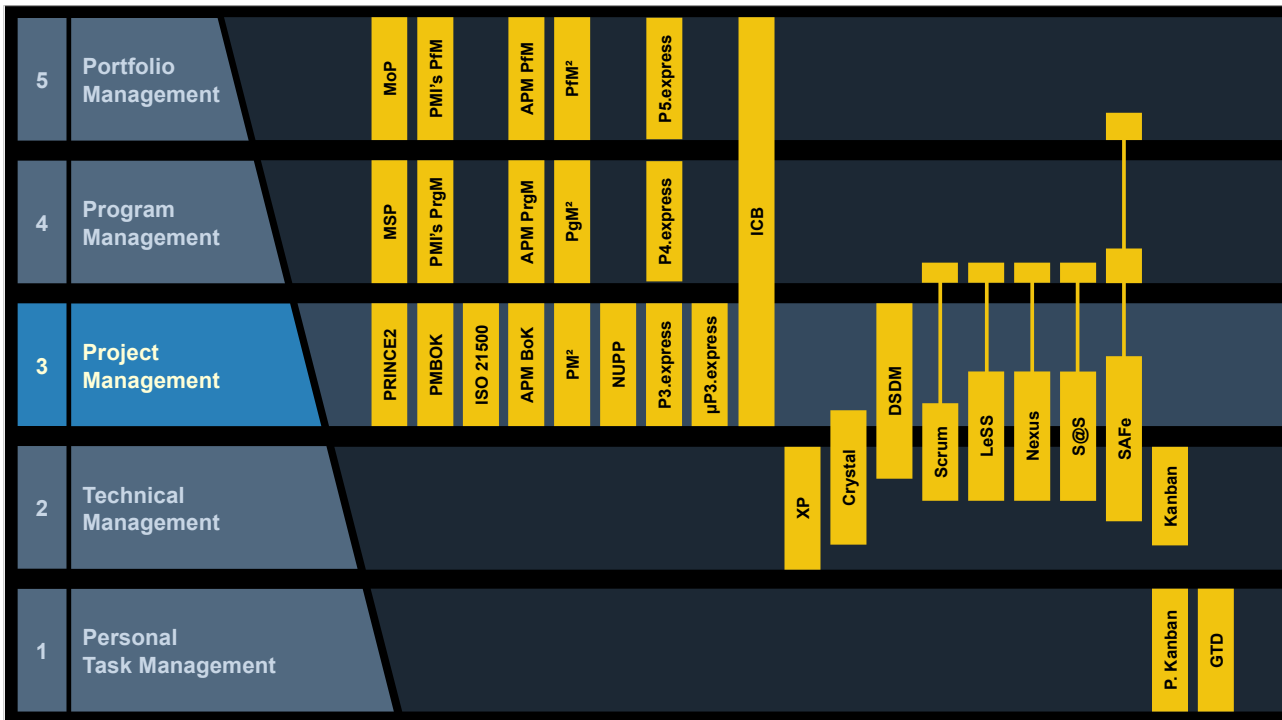


Each problem should be solved in the correct layer.

All layers are necessary







You don't have to explain every system here. They are just here to create a big picture and, potentially, ideas for what to learn next. For example, you can describe what ICB is, how it differs from all other systems here, and how your learners can benefit from learning and using it in addition to P3.express.

Please note that being dogmatic is against the values in P3.express and NUPP, and we should never consider other systems as useless, wrong, etc. These are all helpful resources that can help us in different ways. The way they help practitioners is different, and their target audience may also differ. However, there was a gap in this ecosystem, and P3.express was created to help practitioners by filling in that gap: A project management system (methodology) usable for regular project managers in typical projects that covers all important project management aspects.

Note: "μP3.express" is short for "micro.P3.express"



We'll have a quick review of the two development methods. We don't want to go into too much detail, though. A high-level understanding is enough.

Note that many people don't understand what "Agile" is, which causes serious problems. The main goal of this section is to give a relatively clear understanding of that. Afterward, we'll explain the relationship between the development method and the P3.express project management system.

5

4

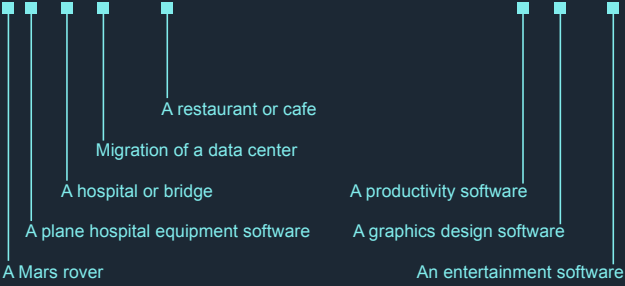
3

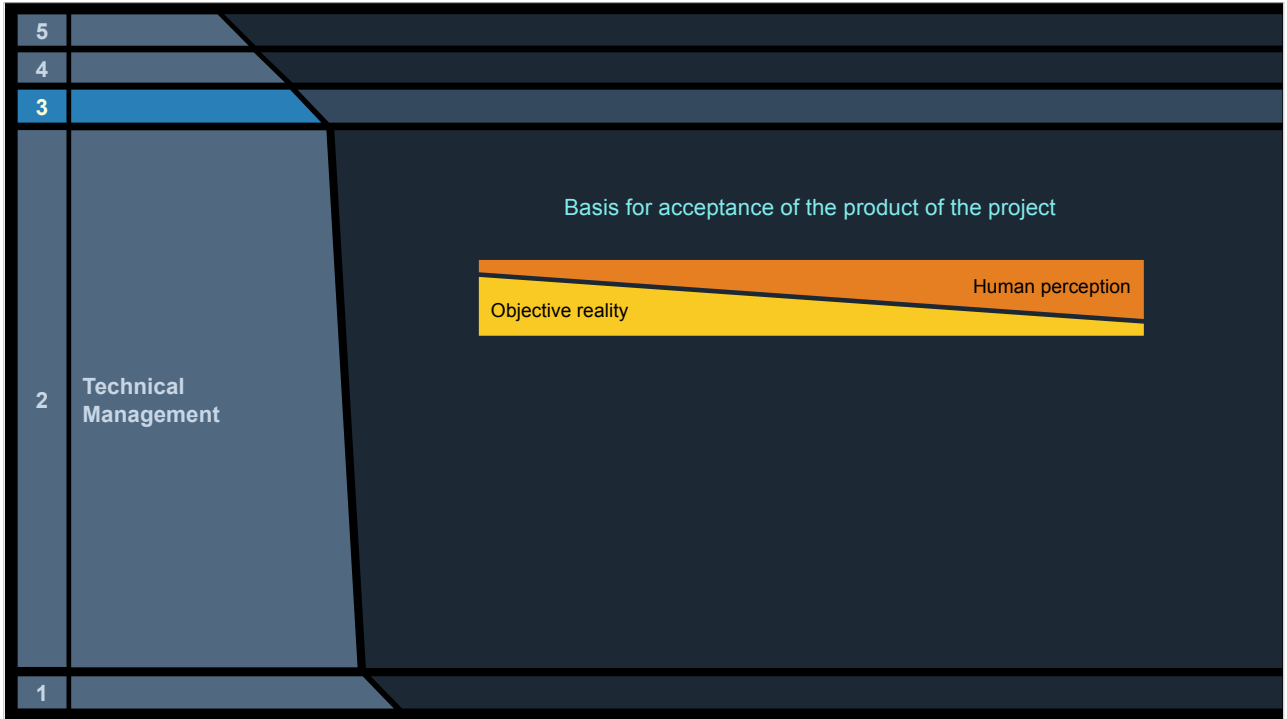
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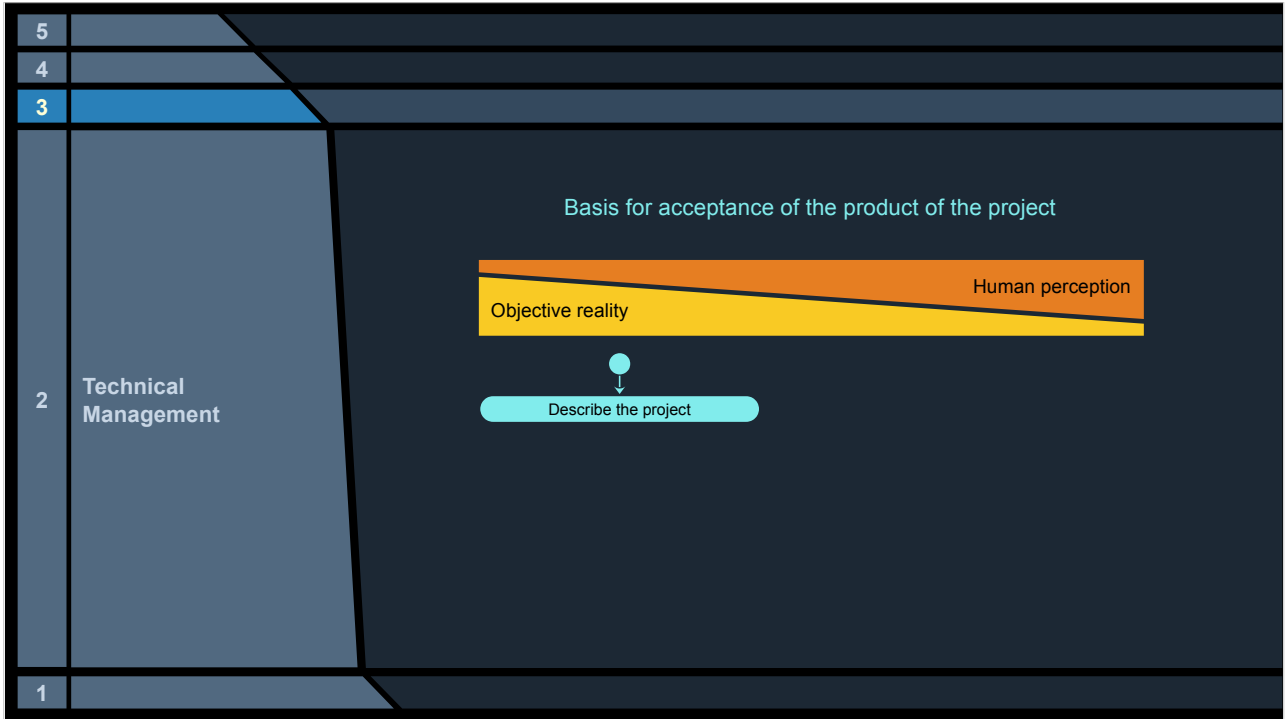
1

Technical Management

Basis for acceptance of the product of the project







5

4

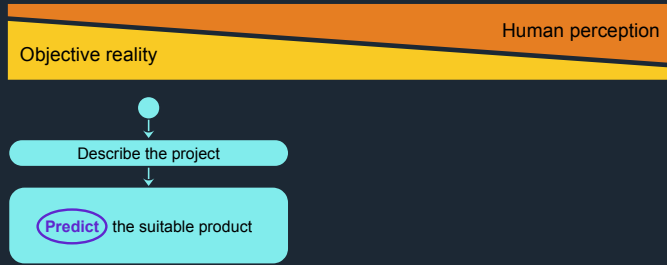
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2

1

Technical
Management

Basis for acceptance of the product of the project



5

4

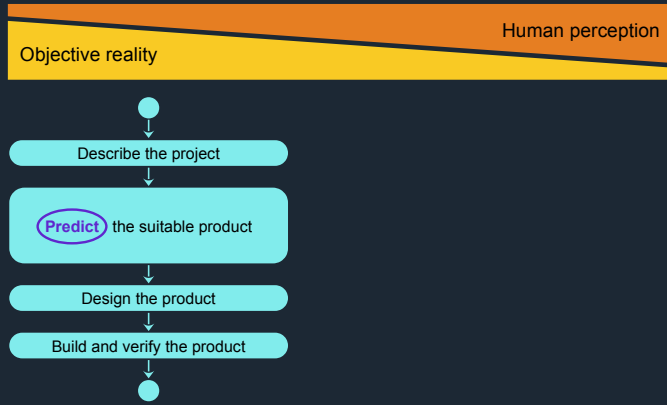
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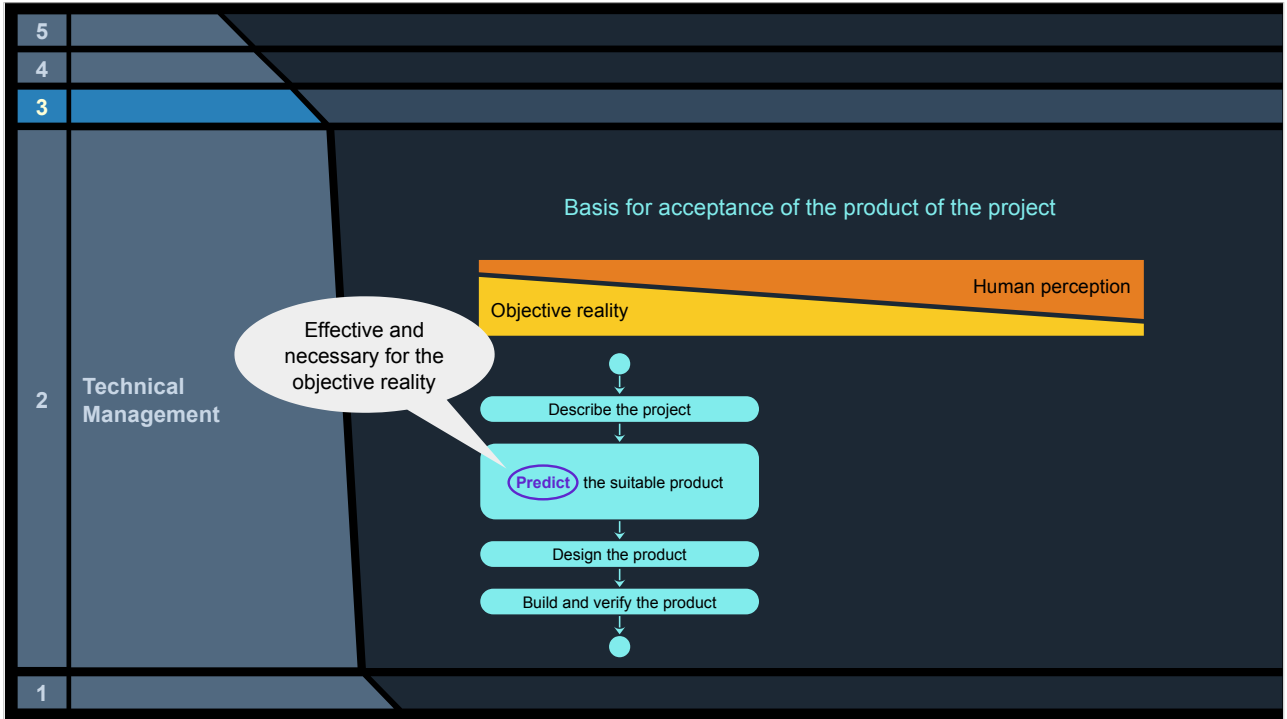
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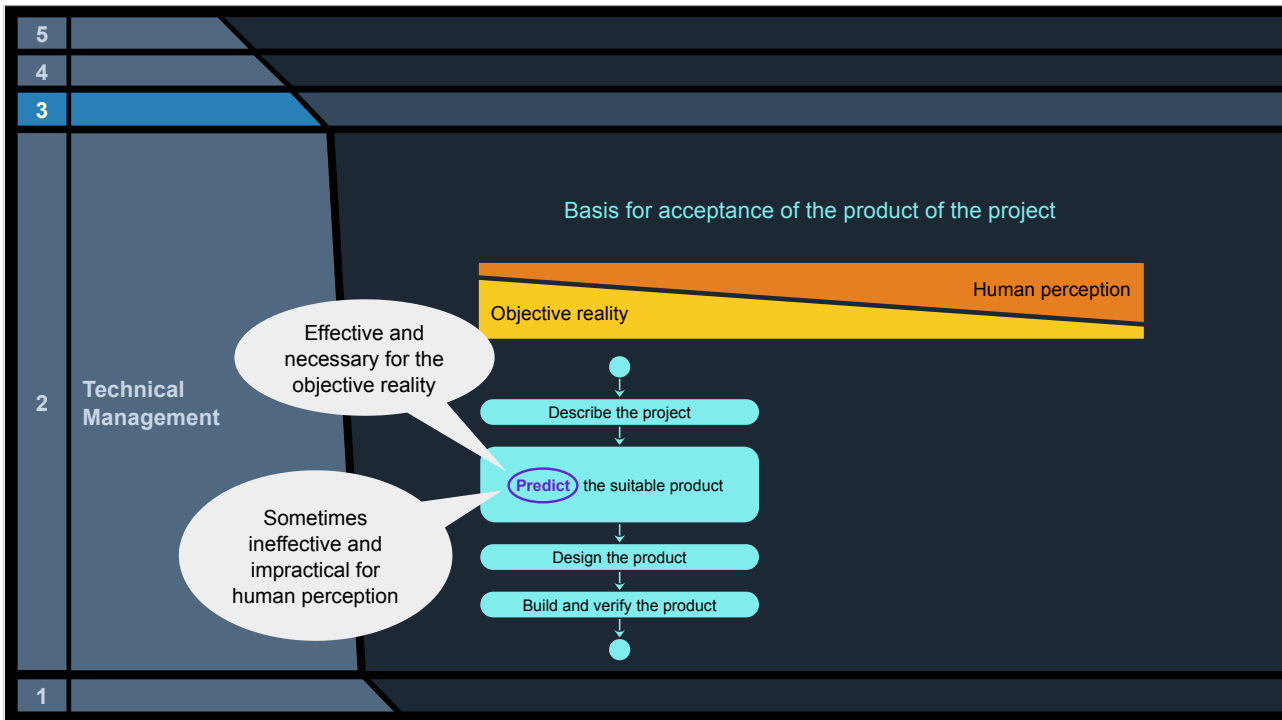
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Technical Management

Basis for acceptance of the product of the project

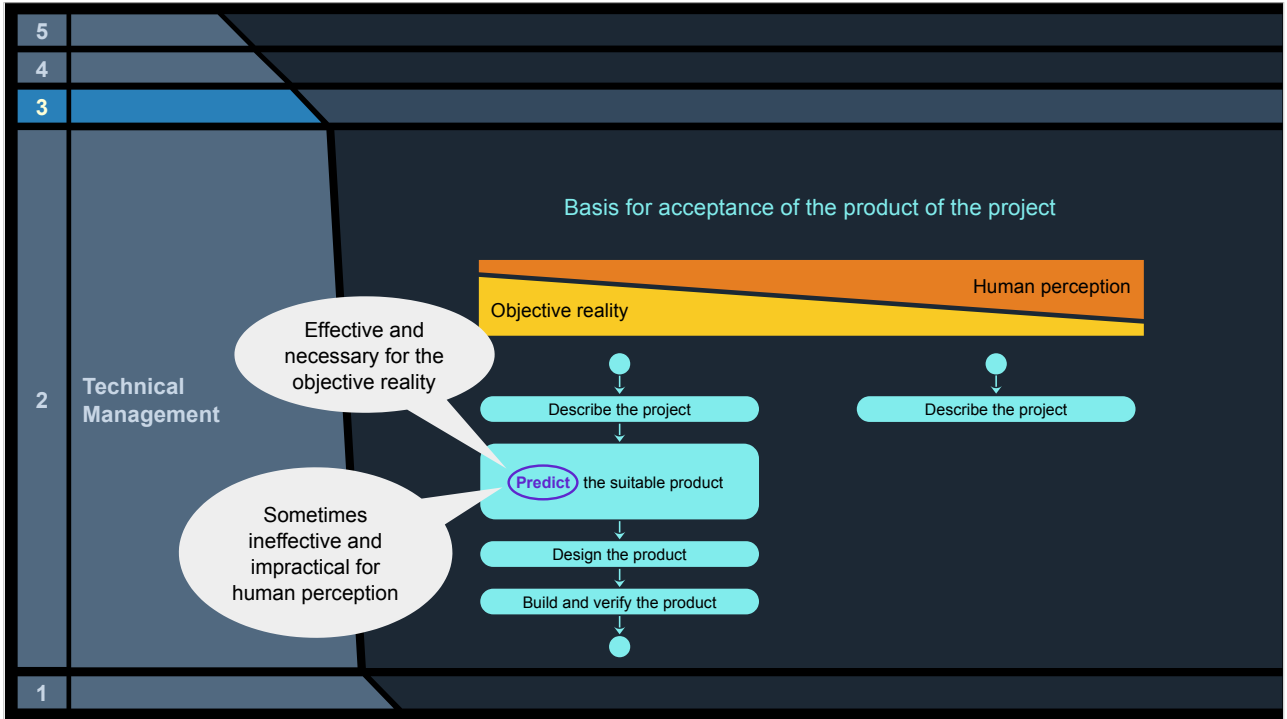


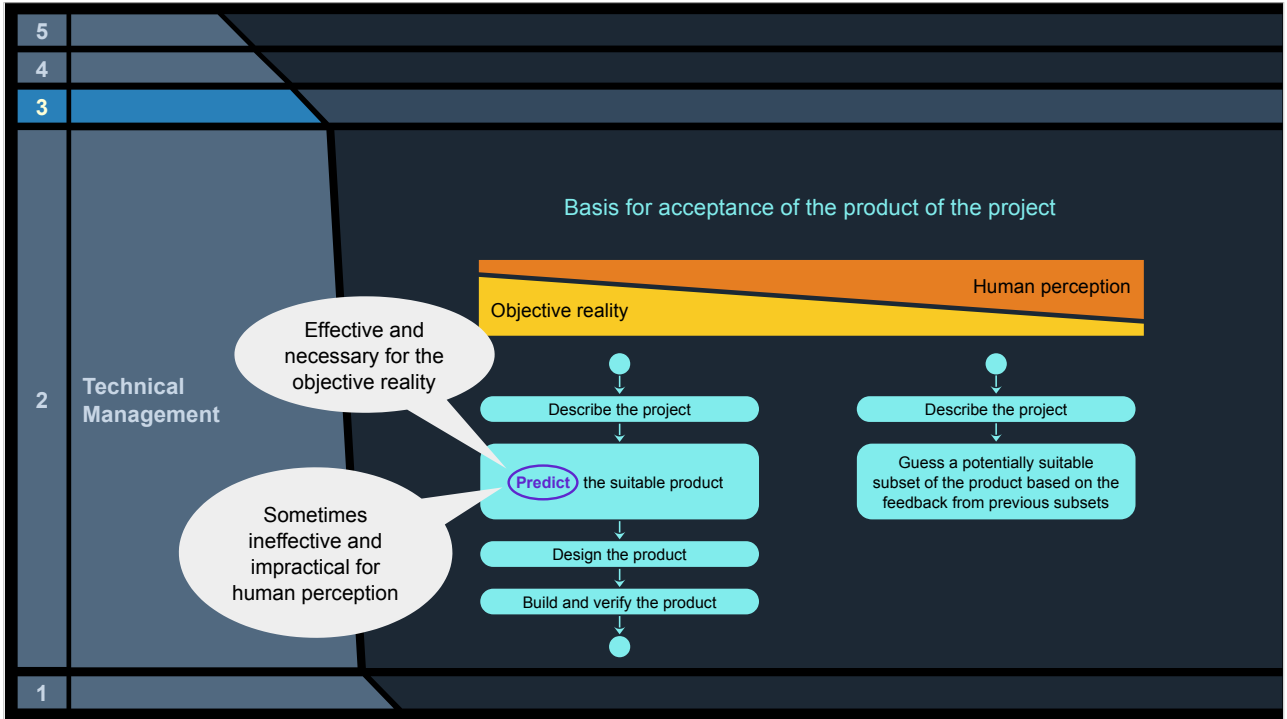


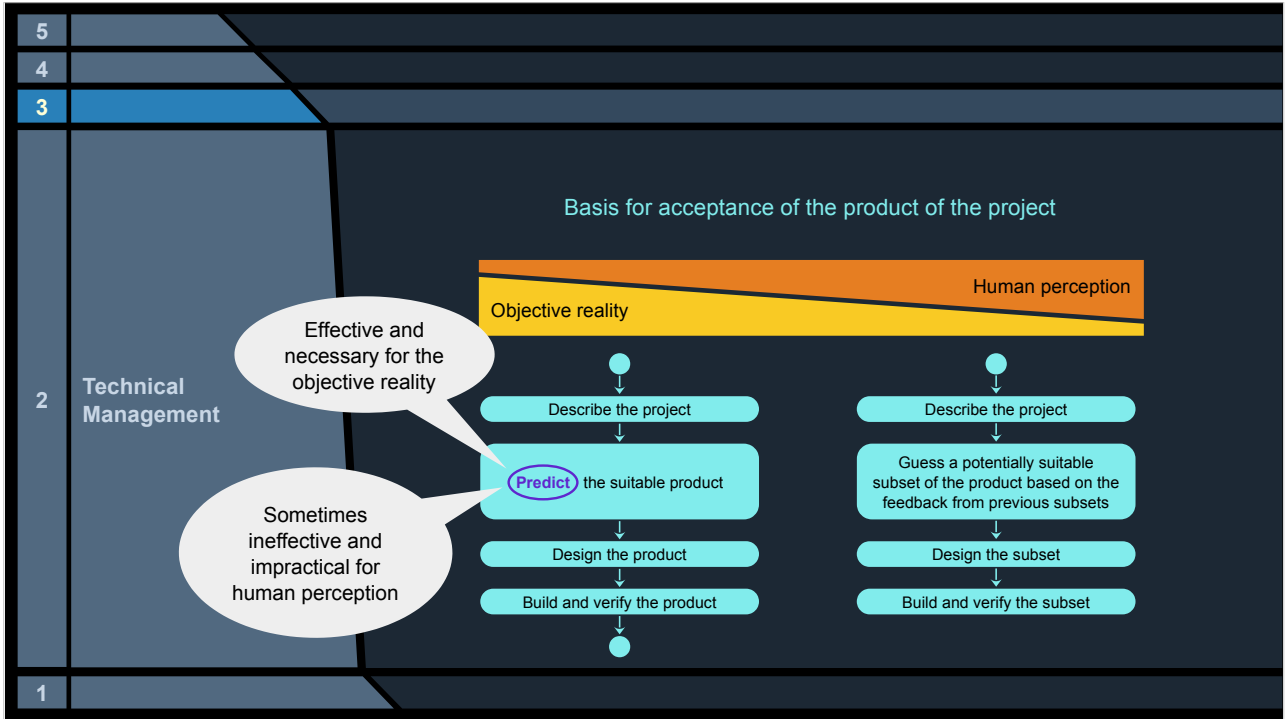


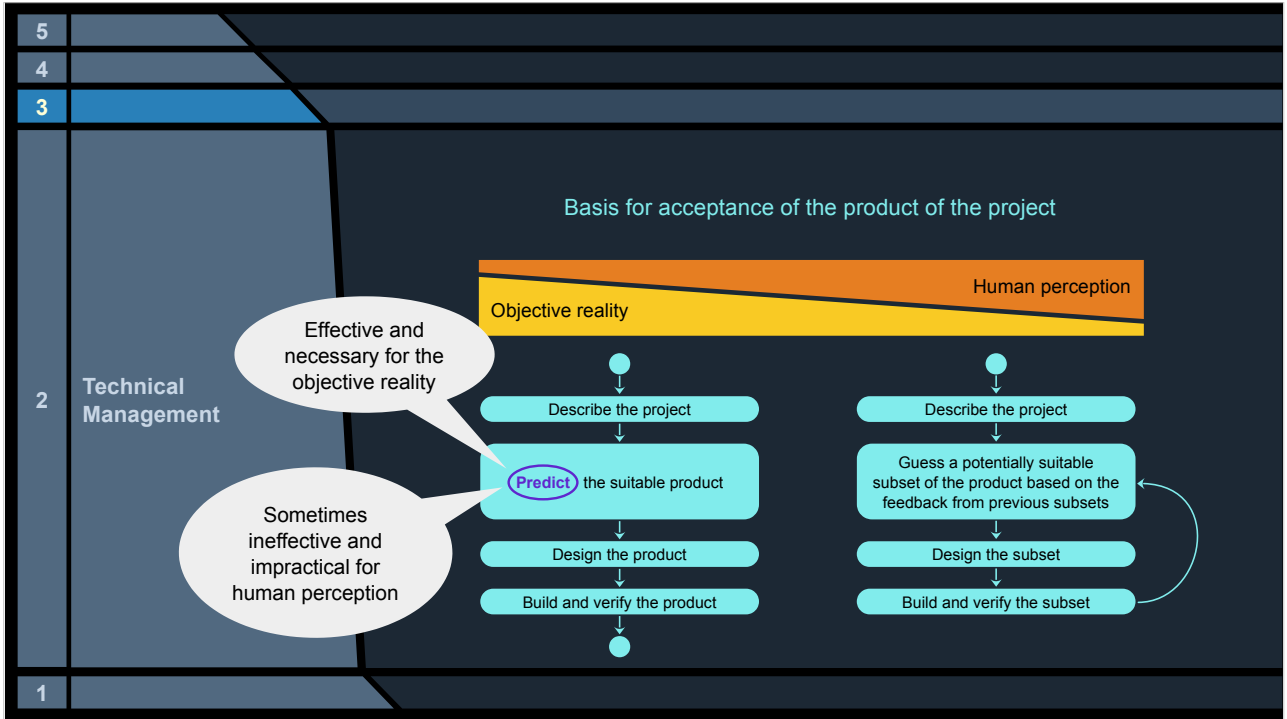
If you find it necessary, give them an example, such as the Mars Rover: We can't risk anything, but we must consider every possibility when designing it and sending it to Mars once. You can start the example by reviewing a few difficulties in building such a rover.

Note: When you build the next rover, you'll use the experience of the previous one to build something better. That is a form of adaptation, but not one that applies to the same product and not what we consider adaptation in this context.









5

4

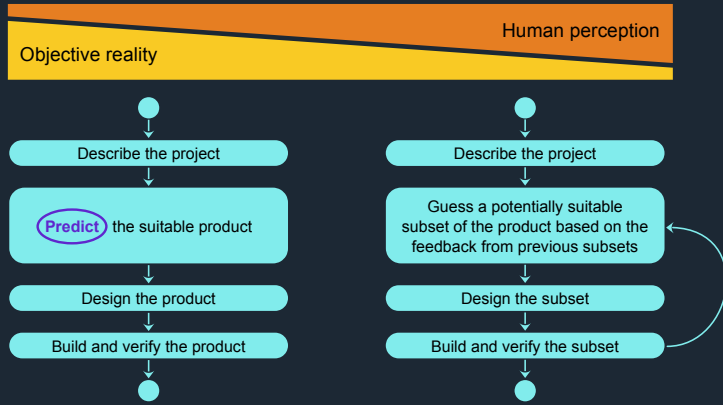
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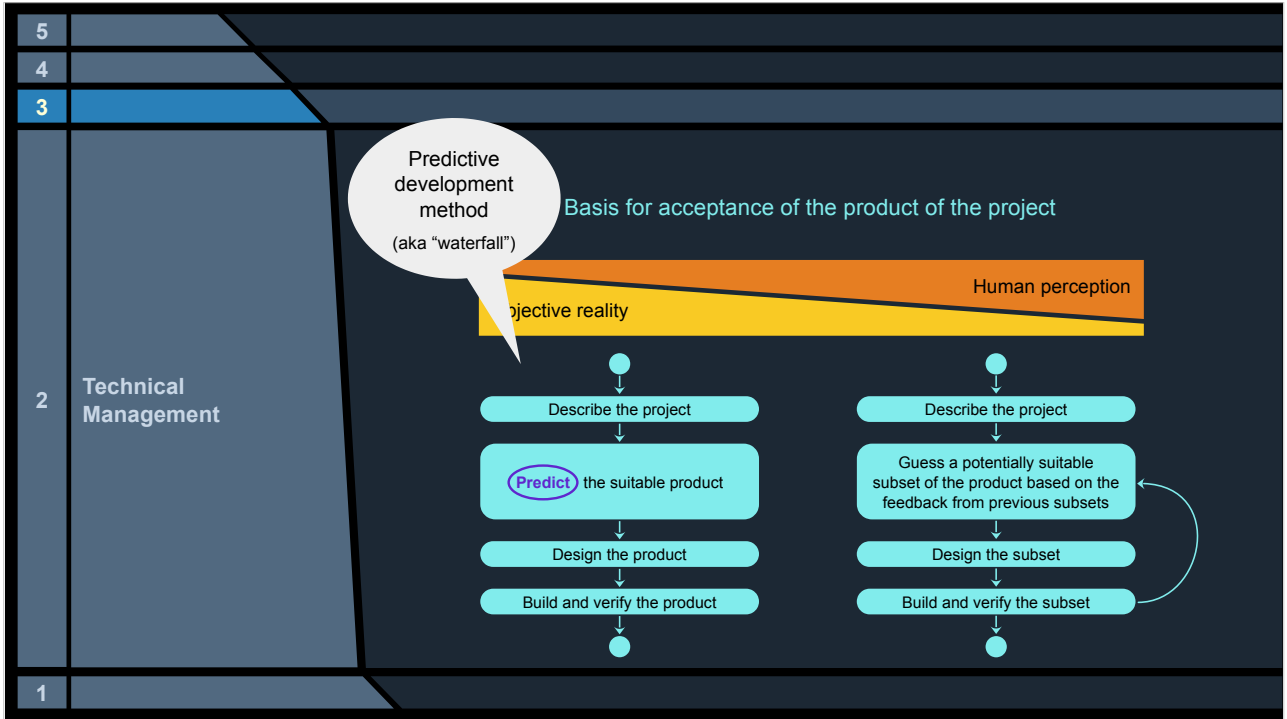
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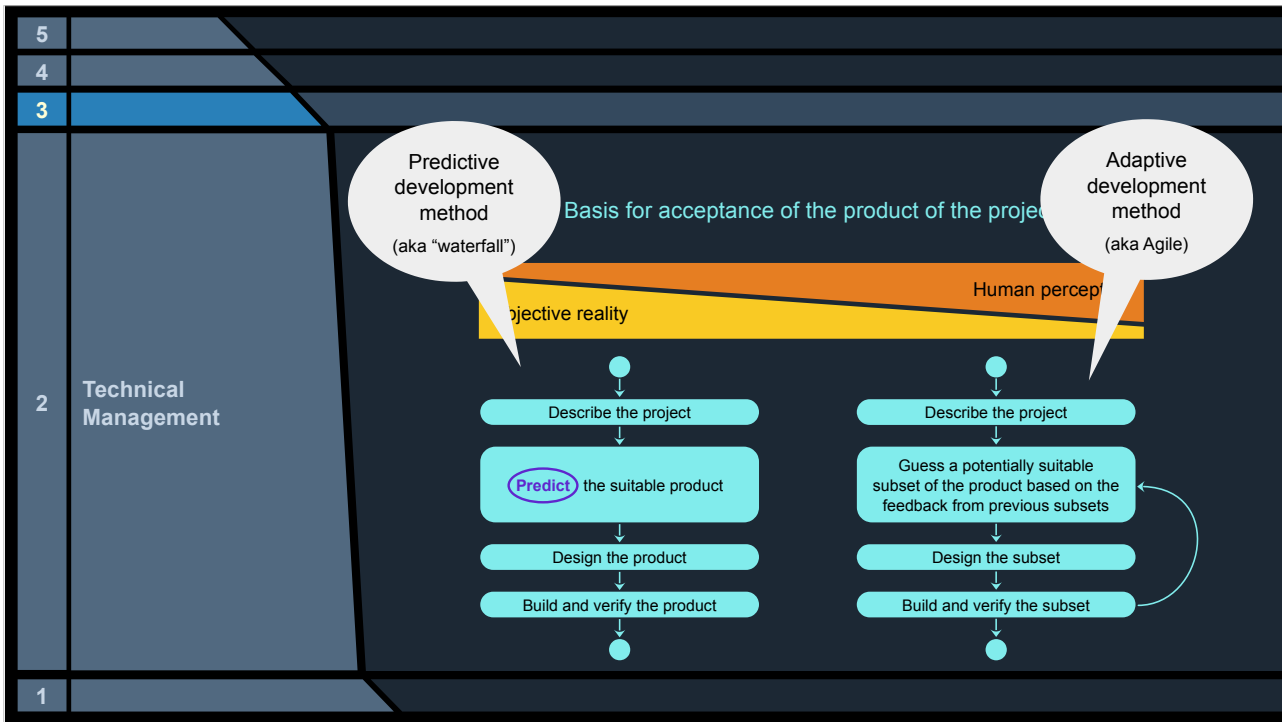
Technical Management

1

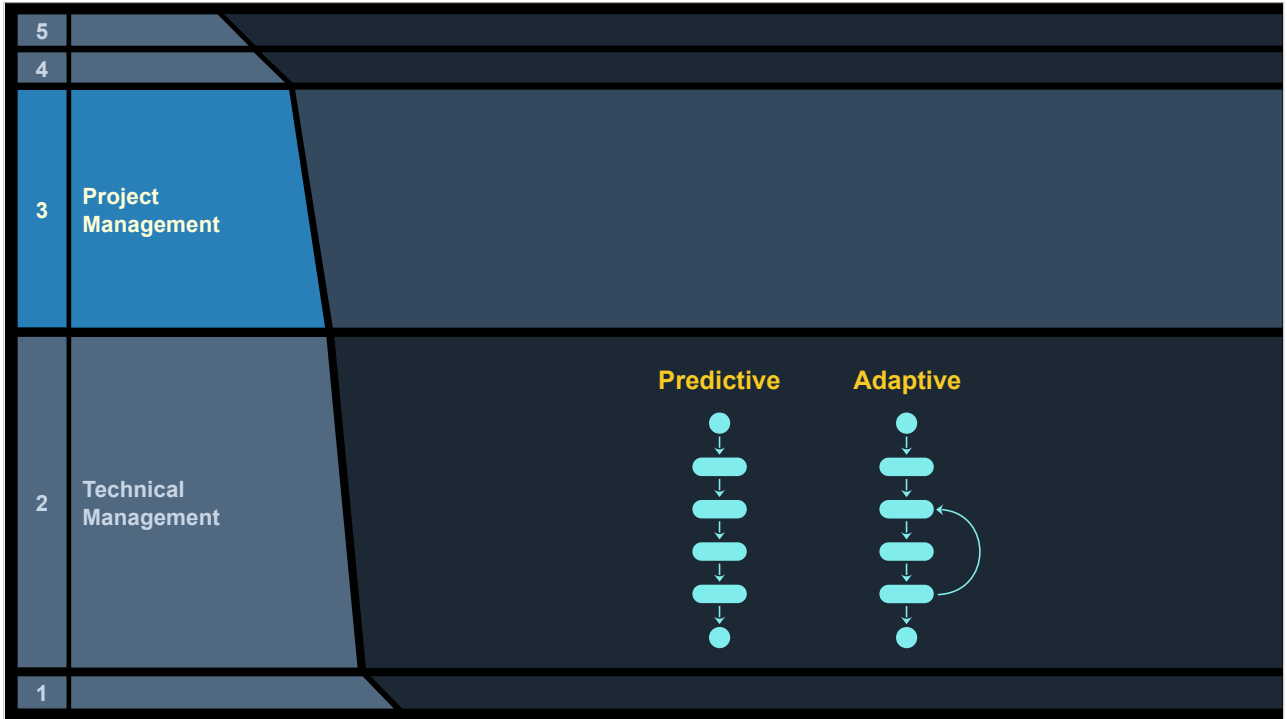
Basis for acceptance of the product of the project

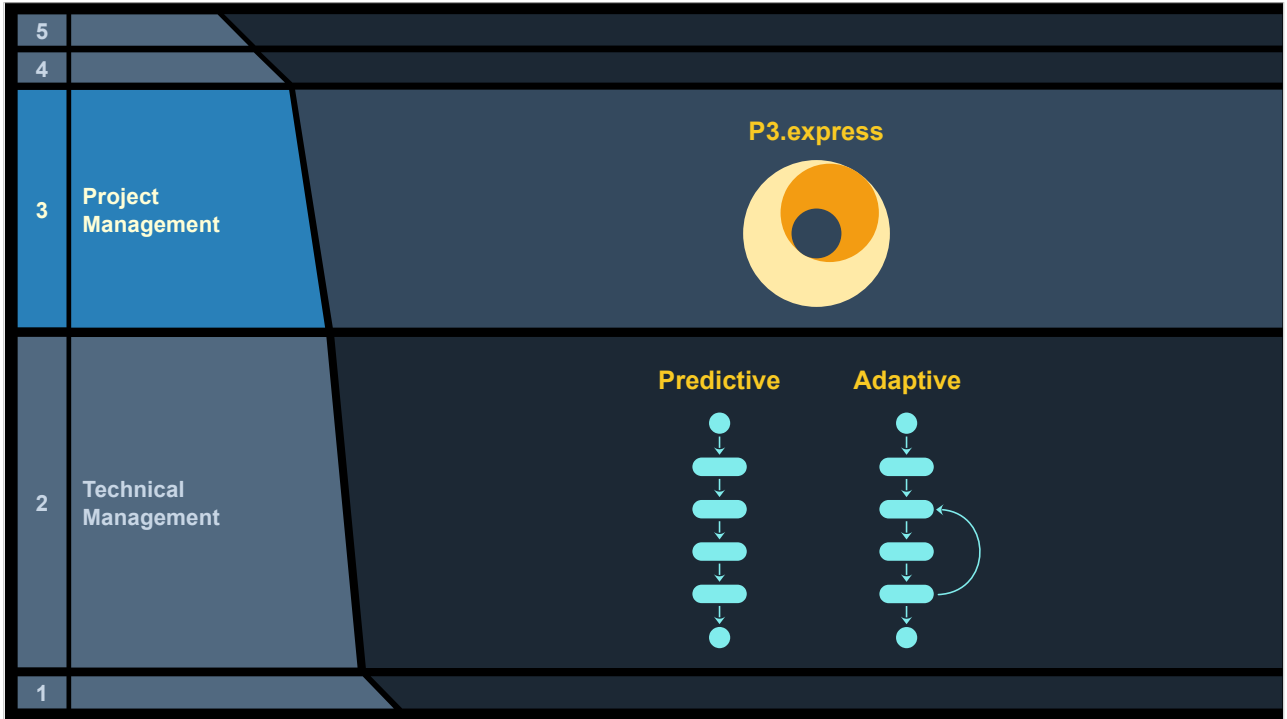


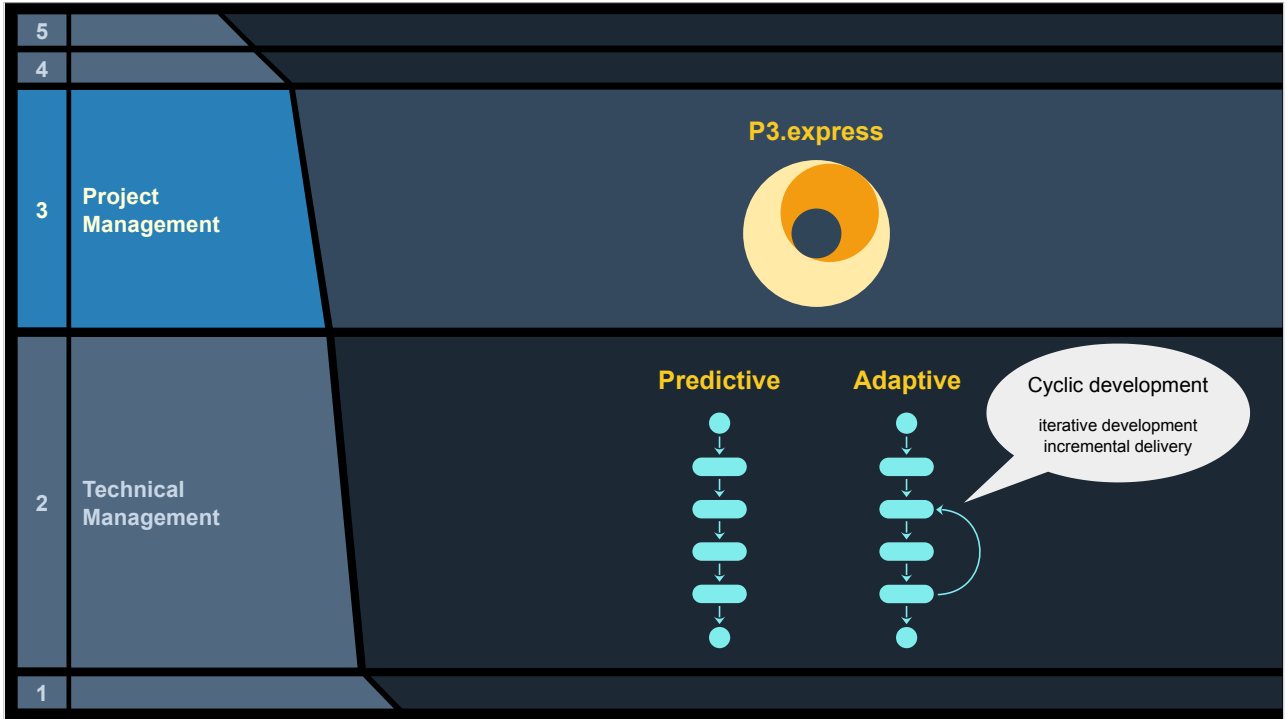


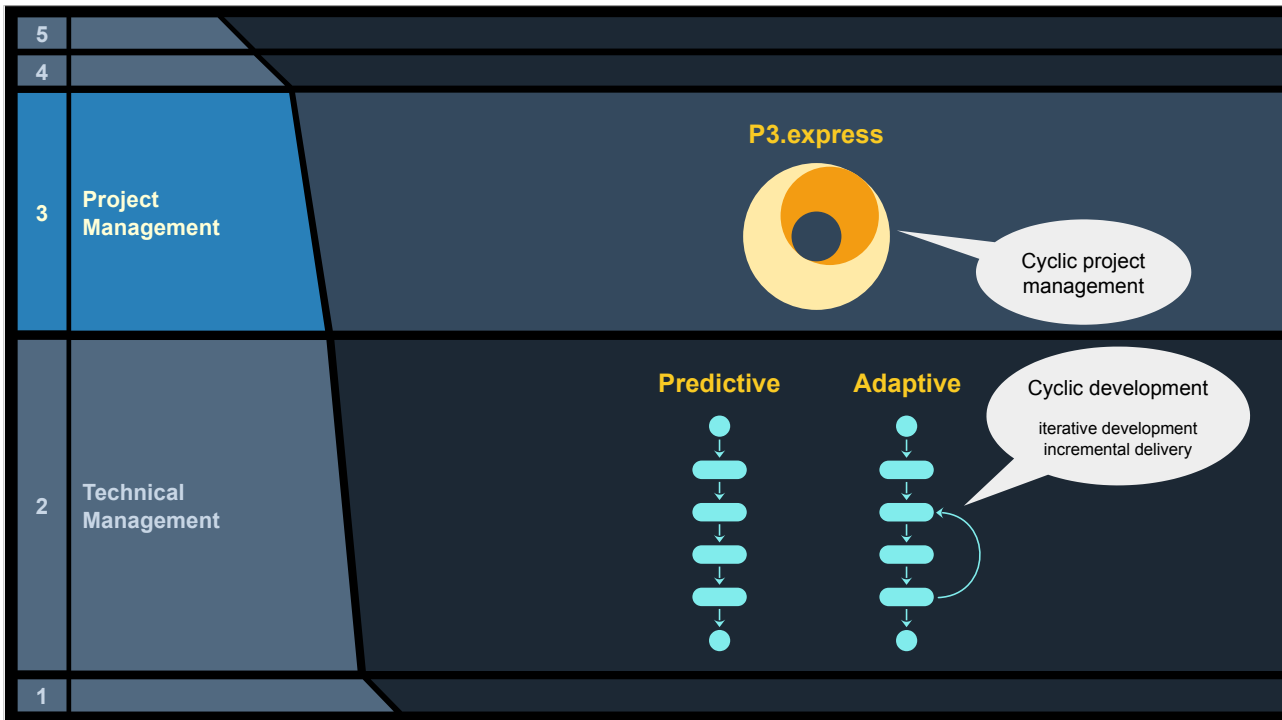


We don't want to use the term "waterfall" because it was created in the Agile community to name the approach they didn't like and has a negative connotation. Both these approaches are valid when used for the right product; therefore, we should accept and promote them without underestimating either.



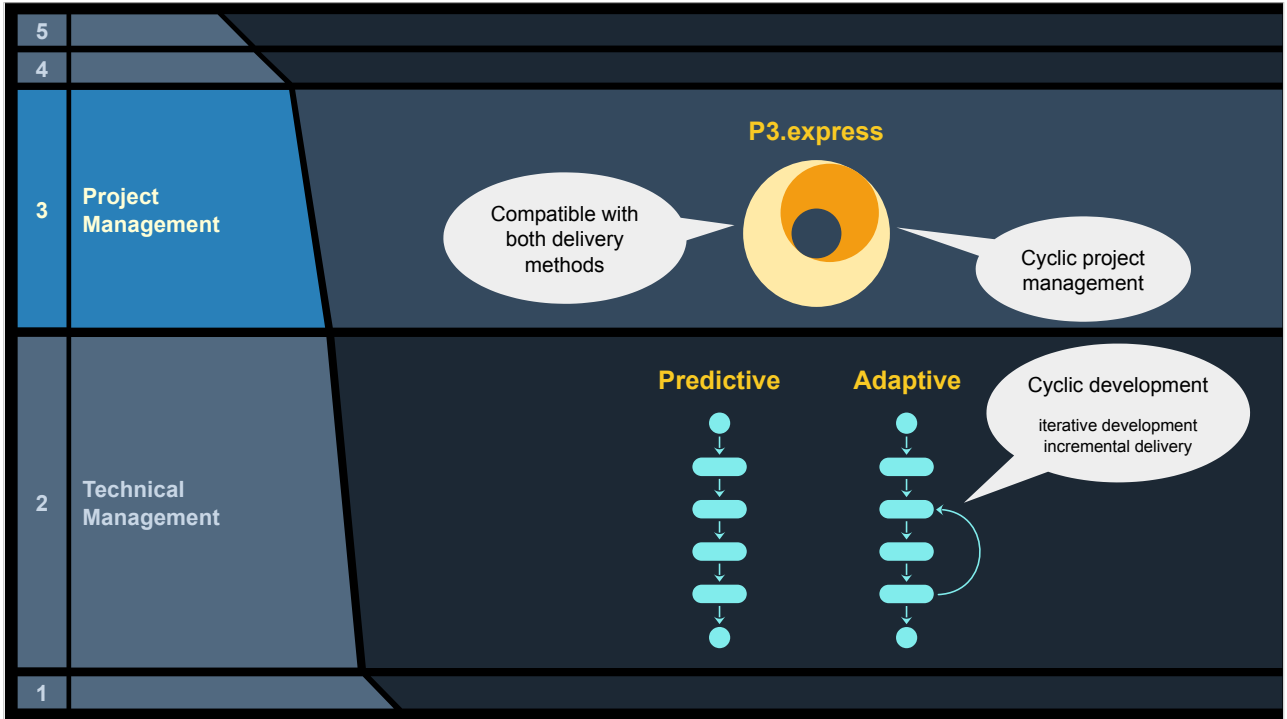






The fact that there are cycles in P3.express doesn't mean it's Agile. Being Agile or not is mainly about the 2nd management layer rather than the 3rd layer, but we still need a system in the 3rd layer that is compatible with our approach in the 2nd layer. P3.express is carefully designed to be compatible with both predictive and Agile approaches without preferring one to the other.

Note: The fact that P3.express is compatible with both development approaches doesn't mean that practitioners can use either in a single project: The choice of development approach depends on the product being built in the project and should be decided carefully.



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④ Tailoring

⑤ Development methods

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⑦ Certification program





Code of Conduct

for P3.express Practitioners

Project managers work with many people, and their decisions can significantly impact people's lives. As a result, P3.express insists that project managers have a social responsibility, especially against the project team members.

Some responsibilities are implied in various activities and some that are more abstract and can be used as general guidelines for day-to-day decisions are documented in the Code of Conduct.

Like everything else in this ecosystem, the Code of Conduct was developed with the help of many practitioners and was open for public review before being finalized. All modules (the method, the Code of Conduct, etc.) also accept comments after being finalized. These comments will be collected and usually used to prepare the next version of the module. So, encourage your audience to contribute to this or any other module by submitting their improvement ideas.



Code of Conduct

for P3.express Practitioners

1

2

3

4

5

6



Code of Conduct

for P3.express Practitioners

1

I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;

2

3

4

5

6



Code of Conduct

for P3.express Practitioners

1

I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;

2

I commit to striving to continuously improve my project management skills;

3

4

5

6



Code of Conduct

for P3.express Practitioners

1

I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;

2

I commit to striving to continuously improve my project management skills;

3

I respect human freedom, and I avoid engaging in discriminatory speech or actions in my projects, related to matters including but not limited to gender, age, race, nationality, sexual orientation, political affiliation, and beliefs;

4

5

6



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for P3.express Practitioners

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I commit to striving to continuously improve my project management skills;

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4

I respect the resources invested in the project;

5

6



Code of Conduct

for P3.express Practitioners

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- 3 I respect human freedom, and I avoid engaging in discriminatory speech or actions in my projects, related to matters including but not limited to gender, age, race, nationality, sexual orientation, political affiliation, and beliefs;
- 4 I respect the resources invested in the project;
- 5 I always remain open and yet critical to project management topics, without sacrificing professionalism for affiliations, personal gain, or loyalties, and I will encourage my coworkers to do the same; and
- 6



Code of Conduct

for P3.express Practitioners

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- 6 I will be honest and transparent in my professional work.



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① High-level overview

② Full review

- Ⓐ Project Initiation
- Ⓑ Monthly Initiation
- Ⓒ Weekly Management
- Ⓓ Daily Management
- Ⓔ Monthly Closure
- Ⓕ Project Closure
- Ⓖ Post-Project Management

③ NUPP

④ Tailoring

⑤ Development methods

⑥ Code of conduct

⑦ Certification program



P3.express Practitioner (P3P)

Certification Program

Candidates who are certified are expected to be able to manage projects or contribute to their management in an effective and structured way using P3.express.



As a trainer, please note that the goal of the course is NOT for the learners to pass the exam but rather to learn a project management system they can immediately implement and use in their projects.

Passing the exam is a byproduct of the main goal rather than the goal itself.

P3.express Practitioner (P3P)

Certification Program

Candidates who are certified are expected to be able to manage projects or contribute to their management in an effective and structured way using P3.express.



P3.express Practitioner (P3P)

Certification Program

Requirements:

- Accepting the code of conduct
- Passing the P3P exam



P3.express Practitioner (P3P)

Certification Program



Validity:

- Valid for life, but attributed to the year of issue
- Free re-certification

P3.express Practitioner (P3P)

Certification Program

Validity:

- Valid for life, but attributed to the year of issue
- Free re-certification

P3P-2023
P3P-2024
P3P-2025

...



P3.express Practitioner (P3P)

Certification Program

Validity:

- Valid for life, but attributed to the year of issue
- Free re-certification

- One free attempt,
- during the first 3 months of each year,
- for practitioners who have the previous certificate.

P3P-2023
P3P-2024
P3P-2025
...



The re-certification system described here is permanent.

P3.express Practitioner (P3P)

Certification Program



Exam format:

- Open book
- 70 questions
- 100 minutes
- 67% passing score
- No penalty for wrong answers

P3.express Practitioner (P3P)

Certification Program



Format of questions:

- **Multiple-choice**
 - with 2 or more choices
 - where only one choice should be selected
- **Multiple-answer**
 - with 3 or more choices
 - where more than one choice should be selected

P3.express Practitioner (P3P)

Certification Program



Format of questions:

- **Scenario-based** 80% of questions
- **Direct** 20% of questions

P3.express Practitioner (P3P)

Certification Program



Format of questions:

- **Cognitive level 1** 15% of questions recalling
- **Cognitive level 2** 55% of questions recalling + basic analysis
- **Cognitive level 3** 30% of questions recalling + advanced analysis and deduction

Number of questions	Topic
4	NUPP
3	Code of conduct
2	License and rights
4	Project manager
4	Sponsor
3	Peer reviewer
2	Custodian
1	Team leader
13	Initiations
8	Daily and Weekly Management
4	Closures
4	Post-Project Management
2	Deliverables Map
4	Project Description
6	Follow-Up Register
3	Tailoring
2	Delivery method



Please explain that the P3P exam is not about memorizing anything but understanding the approach and making good decisions in relevant scenarios.



① High-level overview

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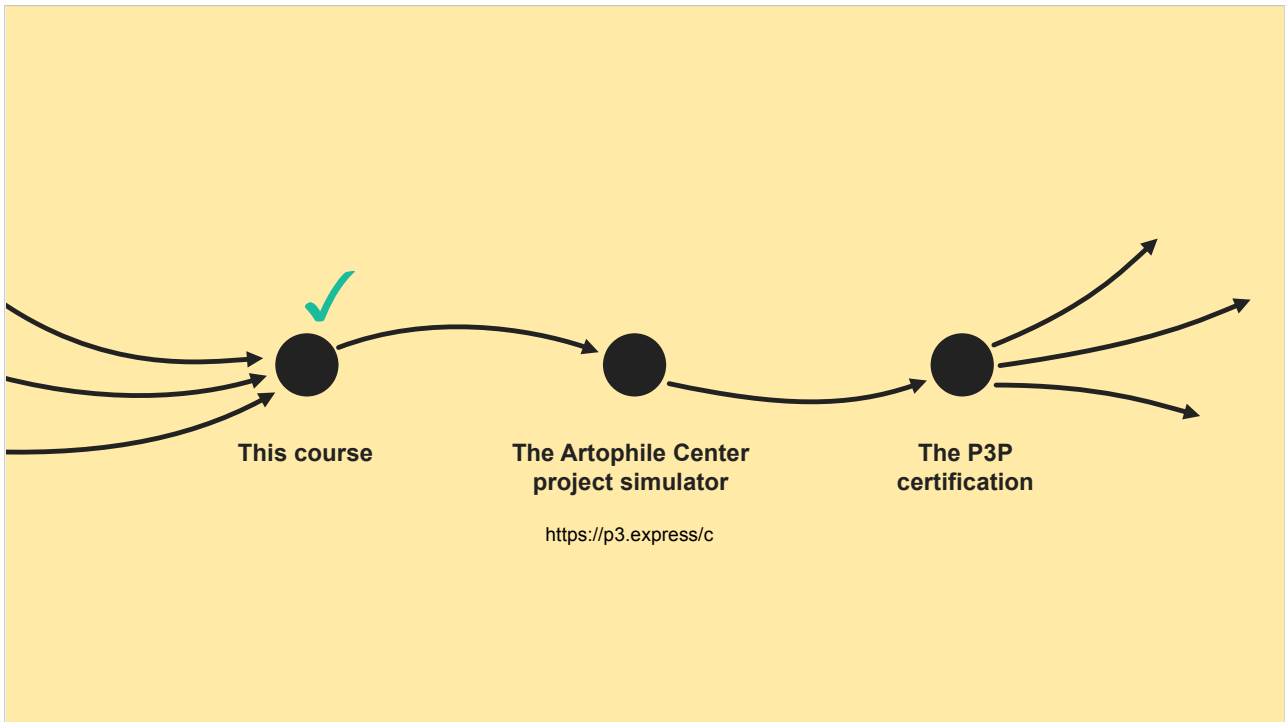
③ NUPP

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It's a good idea for the candidates to take their time and take the Artophile Center project simulator. It takes time to complete it; therefore, it's best to do it after the course, on their own, which would work as a great review of what they've learned from you.

It's a good idea to let them contact you and ask questions while taking the Artophile Center project simulator.

After that, they would be ready to take the exam. They can redeem their vouchers to get access to practice exams, use them to learn about the exam environment and the nature of the questions, and then take the final exam.

By the end of July 2023, 85% of the candidates have passed the exam.