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A/E/C Project Management Bootcamp

- Have some coffee (you may need the caffeine)
- Preview the handout
- List 3 things you want to learn (on page 3)
- Turn off cell phones and tablets (unless you use them to take screen shots)

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Speaker: Bill Hinsley

- PSMJ Resources, Inc. Trainer
  - Strategic Planning
  - Emerging Leaders
  - Project Management
  - Branch Office Optimization
  - Get Work Now!

- Served as a senior leader in two international A/E consultancies

- A/E Consulting experience:
  - Project direction
  - Project management
  - Quality review
  - Business development
  - Proposal preparation
  - Resource management

- PM experience:
  - Planning
  - Engineering procurement
  - Management for large civil works projects ranging in capital value from $1 million to $11 billion.

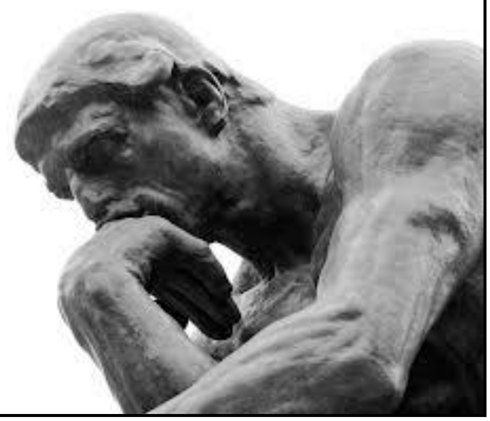
Why Are You Here?

What are your 3 top "hot button" items for this program?

1. ______________________

2. ______________________

3. ______________________



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GLOSSARY OF COMMONLY USED PROJECT MANAGEMENT TERMS

Accrual Accounting – a system of accounting where expenses are realized when they are committed and revenues are realized when the work is performed
A/R (Accounts Receivable) – the amount that has been invoiced but not yet collected
Assistant PM – someone assigned by the PM to perform specified project management duties
Backlog – the amount of work that is under contract but has not yet been billed or performed
Benchmarking – comparisons between your firm and other similar A/E firms
BD (Business Development) – the entire marketing and sales process from seeking leads to negotiating contracts
Business Unit – a portion of the company that is responsible for selling, managing and staffing projects
Cash Accounting – a system of accounting where expenses are realized when they are paid and revenues are realized when the cash is received
Capital Turnaround Days (aka, Trade Collection Days) – the average time it takes to invoice projects and collect the accounts receivable
Client – the person organization that is paying the firm for the project
Client Management – that portion of the business development process that attempts to secure additional work or referrals from existing clients
Client Touch – any communication with the Client that is not perceived as a sales pitch
CPM (Critical Path Method) – a project scheduling method that shows task interrelationships
CSFs (Critical Success Factors) – the most important considerations on the project
Direct Costs – costs attributable to a specific project
DL (Direct Labor) – the cost of all time charged to projects (excluding fringe benefits and statutory costs)
DL Multiplier – the amount billed to the client divided by the direct labor cost. Computed on a firm-wide basis as the Net Revenue divided by total Direct Labor
Downward Budgeting – a budgeting method that determines level of effort to meet a predetermined total budget
Earned Value – the dollar equivalent of the work completed on a project
Gross Revenue – the total amount of money that comes into the firm from a contract
Guaranteed Max – the maximum amount that can be invoiced on a cost-reimbursable contract (unless there is a scope increase)
LS (Lump Sum) – a form of contracting in which the firms agrees to a defined scope for a fixed price
Marketing – that portion of the business development process that seeks to find clients with potential projects
Not-to-exceed – a contractual limit on a cost-reimbursable contract that cannot be exceeded with prior client approval
Net Payroll Multiplier – the firm's net revenue divided by its total payroll (aka, Revenue Factor)
Net Revenue – gross revenue minus other direct costs
Net Revenue Deficit – the amount of money a project loses by not achieving its target direct labor multiplier
Net Revenue Surplus – the amount of money a project gains by exceeding its target direct labor multiplier
Niche – a service for which a client is willing to pay a premium price
ODCs (Other Direct Costs) – all non-labor costs charged to a project
OH (Overhead) Rate – the firm's total overhead expenditures divided by its total direct labor
Owner – the person or organization that will own the project when completed
PMP (Project Management Plan) – a plan prepared by the PM detailing how the project is to be performed
QBS (Qualifications Based Selection) – a selection process in which the client selects an A/E firm based on qualifications, then negotiates the fee
Quiet Hour – one hour each day in which no interruptions are allowed
Principal-in-Charge – the senior level manager who oversees the project manager
Project Manager – the person who is responsible to both the firm and the client for the success of the project
Reserves – questionable revenues that aren't counted on the P&L statement
Risk Management Plan – a plan which anticipates risks, quantifies them, and establishes means of mitigating them
Sales – that portion of the business development process that occurs after deciding to pursue a proposal opportunity
Scope Creep – an increase in the work required without a commensurate increase in compensation
SMART Objectives – project objectives that are specific, measurable, assignable, realistic and time-related
Subconsultant or Subcontractor – a person or organization outside your firm who is responsible for performing a portion of the project
T&M (Time and Materials) or T&E (Time and Expenses) – a contracting method in which the client pays the firm for its time and expenses based on agreed-upon rates
Utilization (aka Chargeability) – the percentage of the total payroll that is charged to projects
Upward Budgeting – a project budgeting method based on estimating required level of effort for each scope iterm
Value Pricing – a pricing structure in which the client is charged based on the value provided, not the costs incurred
WBS (Work Breakdown Structure) – An outline of all the tasks that need to be performed on the project
WIP (Work in Process) – the amount of work that has been performed but not yet invoiced
Write-down or write-off – revenues which are taken off the books because they will not likely ever be realized
Write-up – revenues in excess of what was planned when the project was sold

MY PERSONAL SEMINAR IMPLEMENTATION PLAN

Idea	Tools Page No.	Implement By	Discuss With	*

IDEAS FOR FIRM-WIDE IMPLEMENTATION

In-house program: Hand this sheet in at the end of the program.
Public program: Discuss with the appropriate person(s) in your firm.

Idea	Tools Page No.	Discuss With

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What is a Project Manager?

Never mind what your business card says. Are you really a PM?

Traits of the Best Project Manager You Know

The name of the best PM I know is ________________________

- ❑ ________________________
- ❑ ________________________
- ❑ ________________________
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Top 10 PM Traits as Viewed by 40 Clients

1. Follows through - on both their own & others' commitments
2. Good listener
3. Proactive
4. On top of every aspect of the job
5. Leads by example
6. Good communicator
7. Backs decisions of team members
8. Organized
9. Handles multiple priorities well
10. Technically proficient

As a PM Do YOU?....

☐ Manage proposal efforts	☐ Little involvement in marketing/sales
☐ Negotiate fees	☐ Get fees from others in the firm
☐ Participate in fee negotiations	☐ Rely on others to negotiate fee
☐ Participate in team selection	☐ Rely on dept. heads for staffing
☐ Evaluate team members' performance	☐ Lack authority to direct team members
☐ Get non-performers off your jobs	☐ Feel required to use non-performers
☐ Control technical direction	☐ Delegate tech. matters to dept. heads
☐ Control budgets and schedules	☐ Monitor budget & schedule
☐ Maintain rapport with clients	☐ Report status to client
☐ Direct fee collection strategies	☐ Let accounting handle collections
☐ Feel responsible for success or failure	☐ Keep records of who did not perform

☐ Total ☐ Total

Build Strong PIC - PM Partnerships

Activities	Project Manager	Principal-in-Charge
Fee proposals	Prepares	Approves
Fee negotiations	Participates	Directs
Team selection	Requests	Approves
Performance evaluations	Inputs	Performs
Removing non-performers	Recommends	Acts
Design/technical decisions	Meets standards	Set standards
Client relations	Maintains	Client Sponsor
Future work	Secures	Approves
Accountability	Maintains	Rewards/punishes

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Personal Productivity

"To be a successful PM, you must be comfortable being uncomfortable."

My Personal Time Log

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Totals
Hours Spent on Personal Activities								
Sleep								
Meals								
Shopping								
Recreation								
Socializing								
Other								
Other								
Other								
Total Hours Spent on Personal Activities								
Hours Spend on Business/Professional Activities								
Client Meetings								
Internal Meetings								
Other Meetings								
Client Phone Calls								
Other Phone Calls								
Emails								
Technical/Design Work								
Admin Work								
General Marketing								
Proposals								
Other								
Other								
Other								
Total Hours Spent on Business Activities								
Total Hours Spent (Should equal 24 hours/day)								

Set aside 1 hour of uninterrupted time every day.
Force yourself to work on <u>only</u> the "important" things.

HOW WELL DO YOU DELEGATE?

1. How often do you take work home or work late at the office?
   a. [ ] Virtually every week
   b. [ ] Frequently
   c. [ ] Rarely

2. Where do you spend most of your time?
   a. [ ] Performing technical/design activities
   b. [ ] Planning the next activities
   c. [ ] Supervision of project team members

3. If you were incapacitated for 6 months, what would happen?
   a. [ ] I have no idea how my duties would be handled
   b. [ ] There is someone on each of my project teams who would probably be able to over my duties
   c. [ ] My duties would be assumed by the “assistant project manager” who has already been designated for each of my projects

4. When you get back to the office from this seminar, how long will it take you to deal with all the stuff that has piled up in your in-boxes (paper and electronic)?
   a. [ ] More than three hours
   b. [ ] One to three hours
   c. [ ] Less than one hour

5. When one of your team members comes to you with a problem, what do you do?
   a. [ ] Tell them to come back later when you have time to deal with the problem
   b. [ ] Tell him/her what to do and send them on their way as quickly as possible
   c. [ ] Keep asking them questions until they figure out the answer themselves

6. When you delegate a task to someone, how much time do you spend with them?
   a. [ ] Just enough to get them going
   b. [ ] Enough to tell them everything I think they need to know
   c. [ ] Enough for them to tell me they have all the information they need

7. When you delegate a task to someone, do you:
   a. [ ] Assume they will get it done when you need it
   b. [ ] Tell them when you need it
   c. [ ] Ask them how long they think it will take

8. When you delegate a task to someone, do you:
   a. [ ] Assume they will get it done for the number of hours you have budgeted
   b. [ ] Tell them how many hours they can charge[ ] Ask them how many hours they think it will take

9. When you delegate a task to someone, how do you follow it up?
   a. [ ] Review it when they give you the finished product
   b. [ ] Periodically ask them how it’s going
   c. [ ] Review it from time to time to be sure they are on track

10. What do you do when someone gives you the results of a task you delegated to them and it isn’t what you expected?
    a. [ ] Redo it yourself so it’s the way you want it
    b. [ ] Explain to them what you wanted and have them redo it
    c. [ ] Separate “different” from “wrong” and have them redo what’s “wrong” (not what’s “different”)

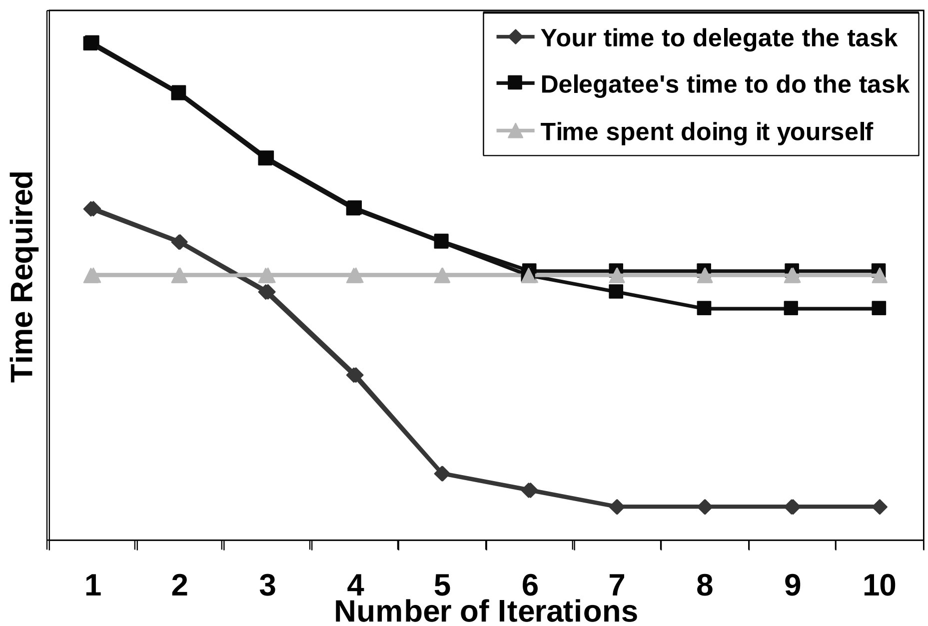
Scoring:
Give yourself 1 point for each “a,” 2 points for each “b,” and 3 points for each “c.”

10 to 15 points – you need serious help!

16 to 24 points – you do some things well but need help in others

25 to 30 points – you should be teaching others how to delegate!

Delegation Dynamics



Plan the Delegation

1. **Plan - beforehand**
   - Select the right person
   - Vision of the end result
2. **Define - the task to be completed**
   - Be specific
   - Confirm mutual understanding
   - Is all the information available to do the work?
3. **Schedule - clearly define time frame**
4. **Level of effort - how to measure it?**
5. **Follow-up - pre-arrange time to discuss** (MBWA & MBAQ)
6. **Expect the product to be 30% different; 10% wrong**

Regular Feedback Helps Keep People on Target

1. Regular feedback keeps people on target
2. Have balance:
   - two prepared compliments
   - two prepared suggestions
3. Must be timely, focused, and specific
4. Encourage outstanding behavior
5. Identify priority areas for improvement

Based on "Formula 2 + 2, The Simple Solution for Successful Coaching", Allen and Allen (2004)

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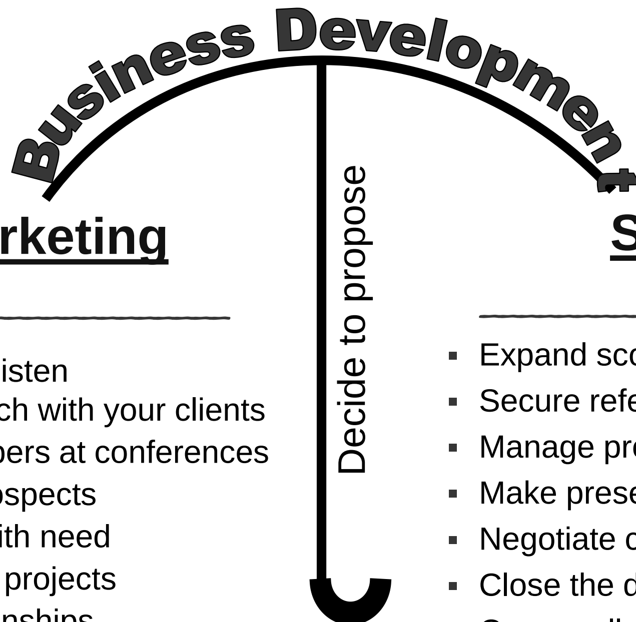
Business Development for PMs

"Power comes to those who bring in work."

-- Frank Stasiowski

BD Includes Marketing and Sales



Marketing

- Watch and listen
- Keep in touch with your clients
- Present papers at conferences
- Look for prospects
- ID clients with need
- ID potential projects
- Build relationships

Sales

- Expand scope of current work
- Secure referrals
- Manage proposals
- Make presentations
- Negotiate contract
- Close the deal
- Cross-sell your firm

Was Vilfredo Pareto Right?

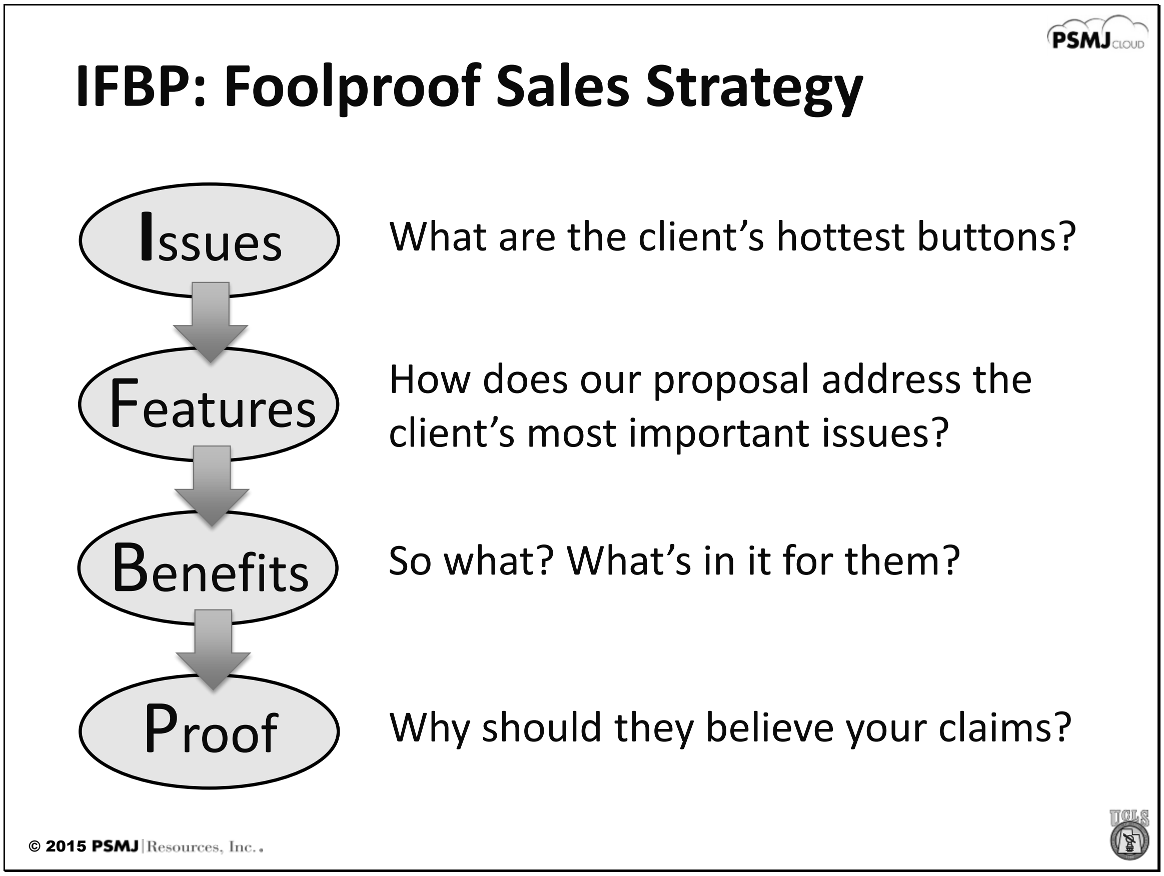
The ________ Rule

Annual Revenue Generation		
Repeat clients	=	___%
New clients	=	___%
Total	=	100%

Business Development Budget Consumption		
Repeat clients	=	___%
New clients	=	___%
Total	=	100%

Use Client Touches

1. Articles about the client's business
2. Info on new legislation affecting them
3. Book about strategies in their business
4. Tool or checklist that makes their job easier
5. Offer to present a seminar on a topic of interest
6. Handwritten thank you notes
7. Lunches & breakfasts
8. Company newsletters
9. Participate in organizations they belong to
10. Invite them to company events
11. Call periodically just to ask how they're doing
12. *All e-mails = one touch*


PSMJ CLOUD
IFBP: Foolproof Sales Strategy
Issues
What are the client's hottest buttons?
Features
How does our proposal address the client's most important issues?
Benefits
So what? What's in it for them?
Proof
Why should they believe your claims?
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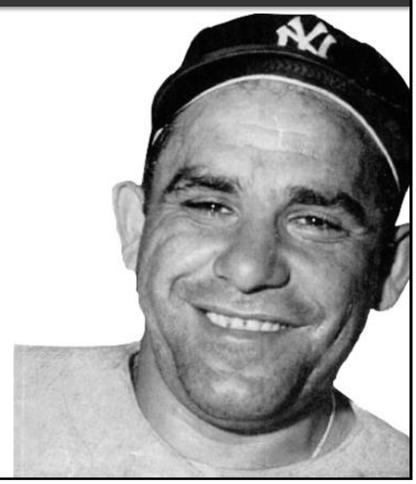
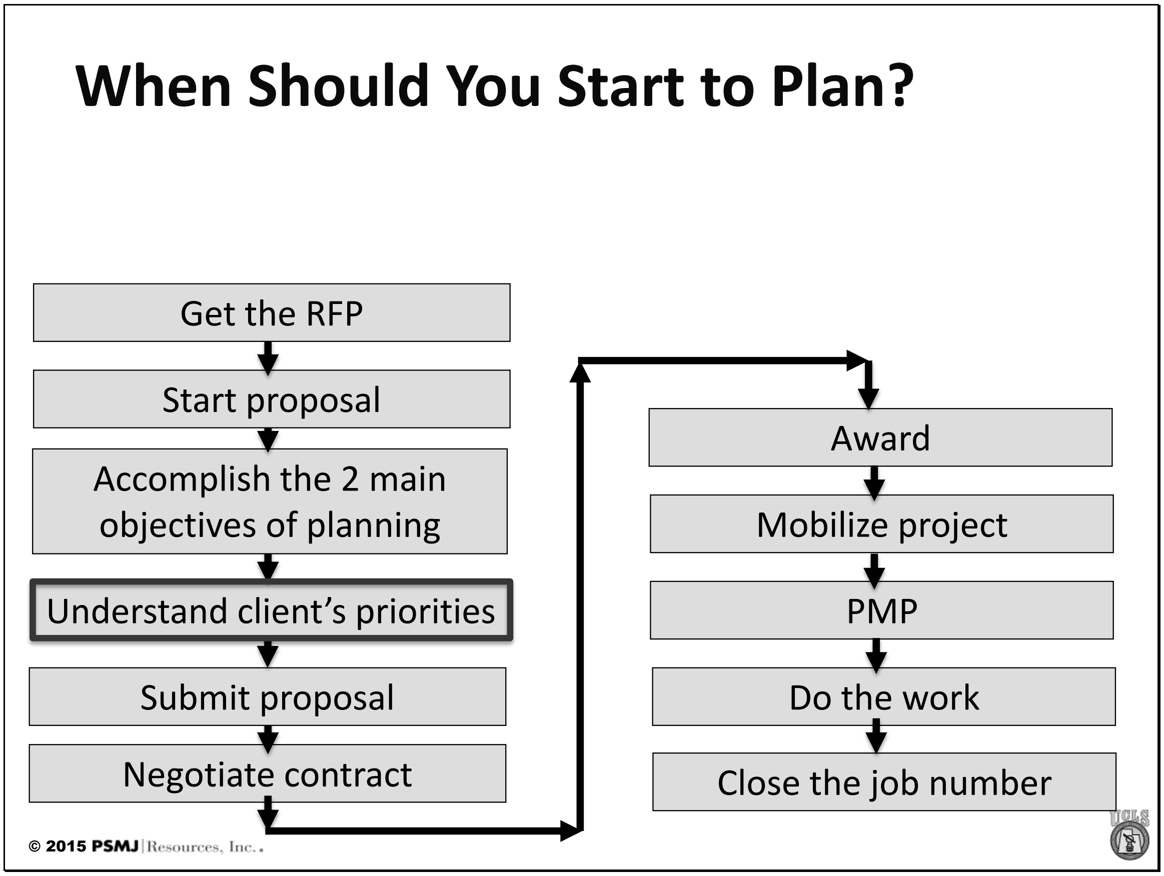
Planning the Project

"If you don't know where you are going, you'll probably end up somewhere else."

-- *Yogi Berra*




When Should You Start to Plan?
Get the RFP
Start proposal
Accomplish the 2 main objectives of planning
Understand client's priorities
Submit proposal
Negotiate contract
Award
Mobilize project
PMP
Do the work
Close the job number
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PMPs for Small Projects Can Fit Onto Just One Page

Work Element	Task Lead	Due Date	Budget	% Complete	Earned Value
1. Survey	Zack	1 Apr	$1,000		
2. Data Analysis	Don	1 May	500		
3. Report Outline	Don	5 May	500		
4. Permitting	Rhonda	15 May	250		
5. Agency Meeting	Rhonda	25 May	150		
6. Project Mgmt	Don	30 May	150		
7. Final Report	Don	30 May	500		
Totals			$3,050		
Spent to Date					**$**
Over/under					**$**

PSMJ PMP Template
Initiation Tab

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PROJECT MANAGEMENT PLAN

Enter Basic Project Data in the geen cells below. It will be automatically copied to the appropriate shee

Project Title:	Adams AFB Dormitory Schematic Design
Client:	U.S. Air Force
Project Number:	PN 1234
Project Manager:	Sam Smith

Project Information

Table of Contents:

Table of Contents

Who Sees Which PMP Documents?

PMP Document	Internal Team	External Team
Project Initiation	✓	✓
Vision, Goals & Objectives	✓	✓
WBS, Schedule & Budget	✓	Maybe
Team Roles & Responsibilities	✓	✓
Document Distribution	✓	✓
Communication Plan	✓	✓
Opportunity Plan	✓	No
Risk Management Plan	✓	Maybe
Quality Control Plan	✓	✓
Change Management Plan	✓	✓
Client Care Plan	✓	No

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Scope, WBS and ABS

Your Scope, WBS and ABS are the foundation for your Project Management Plan.

The Work Breakdown Structure (WBS):

- Is the basic organizational framework for a project
- Is deliverables-based
- Defines and groups project's discrete work elements
- Establishes project hierarchy and task relationships
- Must be logical; detail to match project complexity
- Can be used to develop a "bottom-up" budget

The WBS Must Be Detailed Enough for You to Answer These Questions:

Scope	What needs to be done? *(Deliverables)*
Schedule	In what order will the tasks be done? How much time will they take?
Budget	How many labor hours will each task take? What other costs will be required?
Resources	Who will be responsible for each task? What expertise is needed?

A good check: The WBS should not change unless there is a contract mod.

Example WBS Levels

Level	Used for
1. Phase	• Managing overall deadlines and major milestones • Reporting status by the PM to the client
2. Discipline	• Managing disciplines or other first-level activities • Reporting status by discipline managers to PM
3. Task	• Managing work elements by discipline managers • Reporting status to discipline managers
4. Subtask or Deliverable	• Estimating level of effort • Monitoring progress of each work element

Putting It All Together

Example WBS	WBS Level	OBS Responsibility	ABS Numbers (Job Nos.)
I. Master plan	1	PM (David)	Job #3471.01
II. Schematic design	1	PM (David)	Job #3471.02
III. Design development	1	PM (David)	Job #3471.03
IV. Contract documents	1	PM (David)	Job #3471.04
A. Architectural drawings	2	Lead Architect (Frank)	Job #3471.04.01
1. Floor plans	3		
2. Elevations	3		
a. Front elevations	4		
b. Rear elevations	4		
c. Side elevations	4		
3. Wall sections	3		
4. Details	3		
B. Civil/Structural drawings	2	Lead Civil/Struc. (John)	Job #3471.04.02
C. Mech/Elec drawings	2	Lead MEP (Lois)	Job #3471.04.03

No Job Cost Codes

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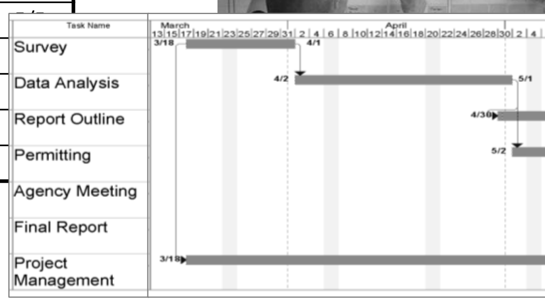
Scheduling the Project

Work Element	Due Date
1. Survey	4/1
2. Data Analysis	5/1
3. Report Outline	
4. Permitting	
5. Agency Meeting	
6. Final Report	
7. Project Mgt.	



Characteristics of a Good Schedule

1. Easily communicated
2. Easy to update/change
3. Has commitment of project team
4. Shows task relationships
5. Has office-wide correlation
6. Forces early deadlines
7. Allows for activities beyond contract date
8. Includes review/correction time
9. Graphic presentation
10. Allows for slippage

Why Schedule?

1. Maintain a sense of urgency
2. Cash flow
   - Your client's funding
   - Your payments

Common Pitfalls in Schedules

1. Not allowing time for internal reviews & corrections
2. Failure to delineate client responsibilities
3. Starting tasks before required prerequisites are complete
4. Failure to consider staff availability
5. Excessive complexity
6. Lack of contingency planning
7. Failure to identify activities beyond your control
8. Forgetting the “soft tasks”

Select the Scheduling Method Mostly by Project Size

Criteria	Milestone Chart	Bar Chart	CPM Schedule	Wall Scheduling
Easy to communicate	Good	Good	Poor	**Excellent**
Cost to prepare	Minimal	Moderate	Moderate	High
Cost to update	Minimal	Minimal	Moderate	High
Degree of control	Fair	Good	**Excellent**	Good
Large projects	Poor	Fair	**Excellent**	**Excellent**
Small projects	**Excellent**	Good	Poor	Good
Team commitment	Fair	Fair	Fair	**Excellent**
Client appeal	Fair	Fair	Good	**Excellent**
Common Project Size	Small	Medium	Large	Small/Large

SCHEDULE EVALUATION CHECKLIST

Fundamental Questions:

- ✓ Is the schedule realistic based on the available resources?
- ✓ Does the schedule track with the contractual due dates?
- ✓ Can the client meet its part of the schedule?

What to look for:

- ✓ Are the task durations and submittal dates realistic?
- ✓ Are the seasons appropriate? (For example, aerial photography and mapping may be feasible only during winter months when vegetation is sparse)
- ✓ Is the sequence of activities realistic and does it follow a logical sequence?
- ✓ Are the review periods realistic?
- ✓ Is there sufficient time to conduct an appropriate client review?
- ✓ If multiple permitting agencies or other 3rd parties are involved in review, is there sufficient time to coordinate comments?
- ✓ Is the right staff available during the proposed review periods to conduct the review? (be careful of holiday and vacation periods)
- ✓ Are there sufficient reviews in the field scheduled?
- ✓ Is there sufficient time allocated to make corrections following reviews?

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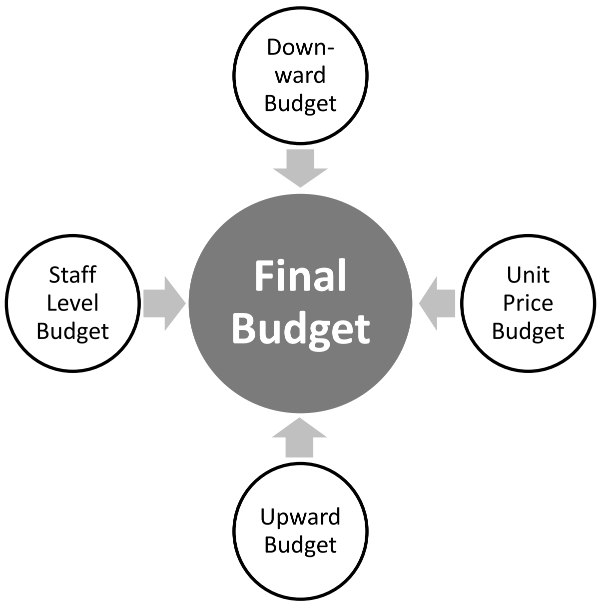
Project Financial Plan

"There are many ways your firm can spend money. But there is only one way it can make money – on projects."

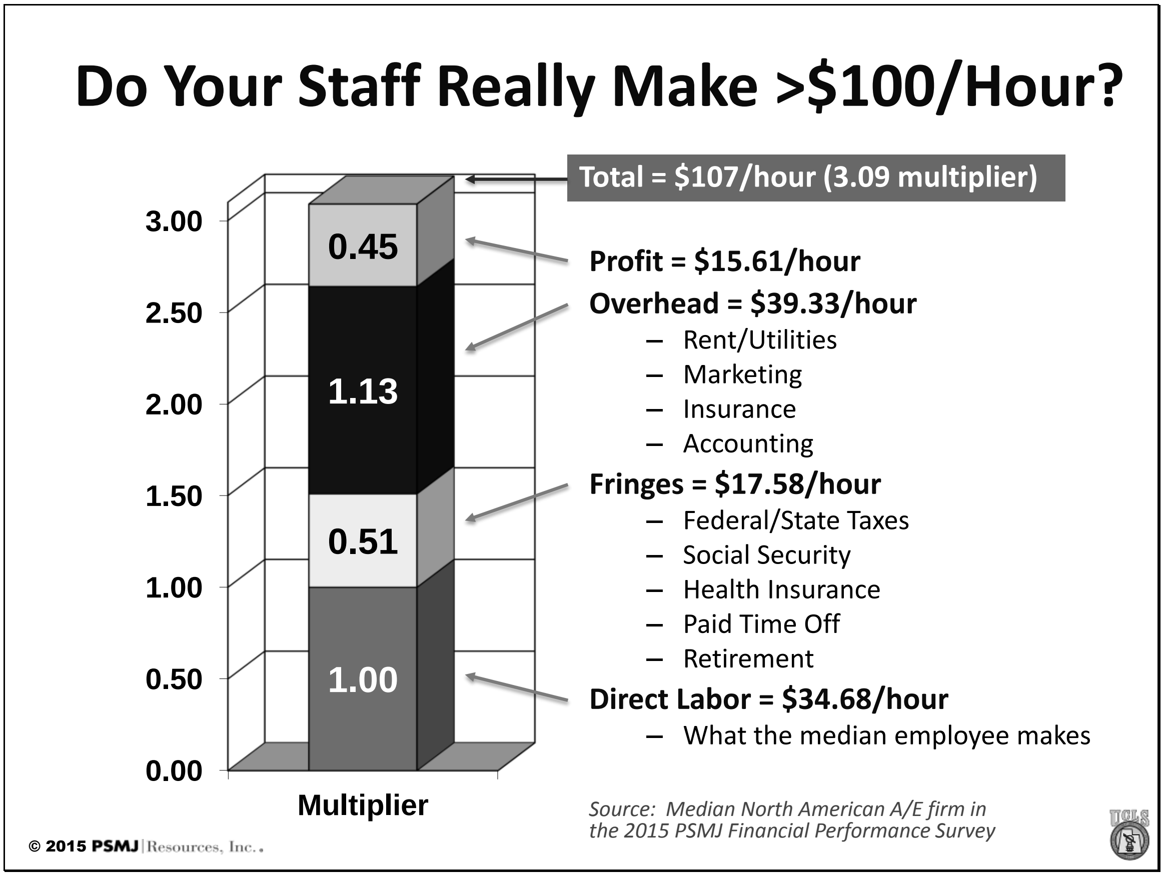
-- Mike D'Alessandro

Use Multiple Methods



Example

Upward Budget	$248,600
Downward Budget	$218,000
Unit Price Budget	$248,100
Staffing Level Budget	$246,100
Mathematical Average	$238,950
Revised (Final) Upward Budget	**$240,000**


Do Your Staff Really Make >$100/Hour?
Total = $107/hour (3.09 multiplier)
3.00
2.50
2.00
1.50
1.00
0.50
0.00
0.45
1.13
0.51
1.00
Multiplier
Profit = $15.61/hour
Overhead = $39.33/hour
– Rent/Utilities
– Marketing
– Insurance
– Accounting
Fringes = $17.58/hour
– Federal/State Taxes
– Social Security
– Health Insurance
– Paid Time Off
– Retirement
Direct Labor = $34.68/hour
– What the median employee makes
Source: Median North American A/E firm in the 2015 PSMJ Financial Performance Survey
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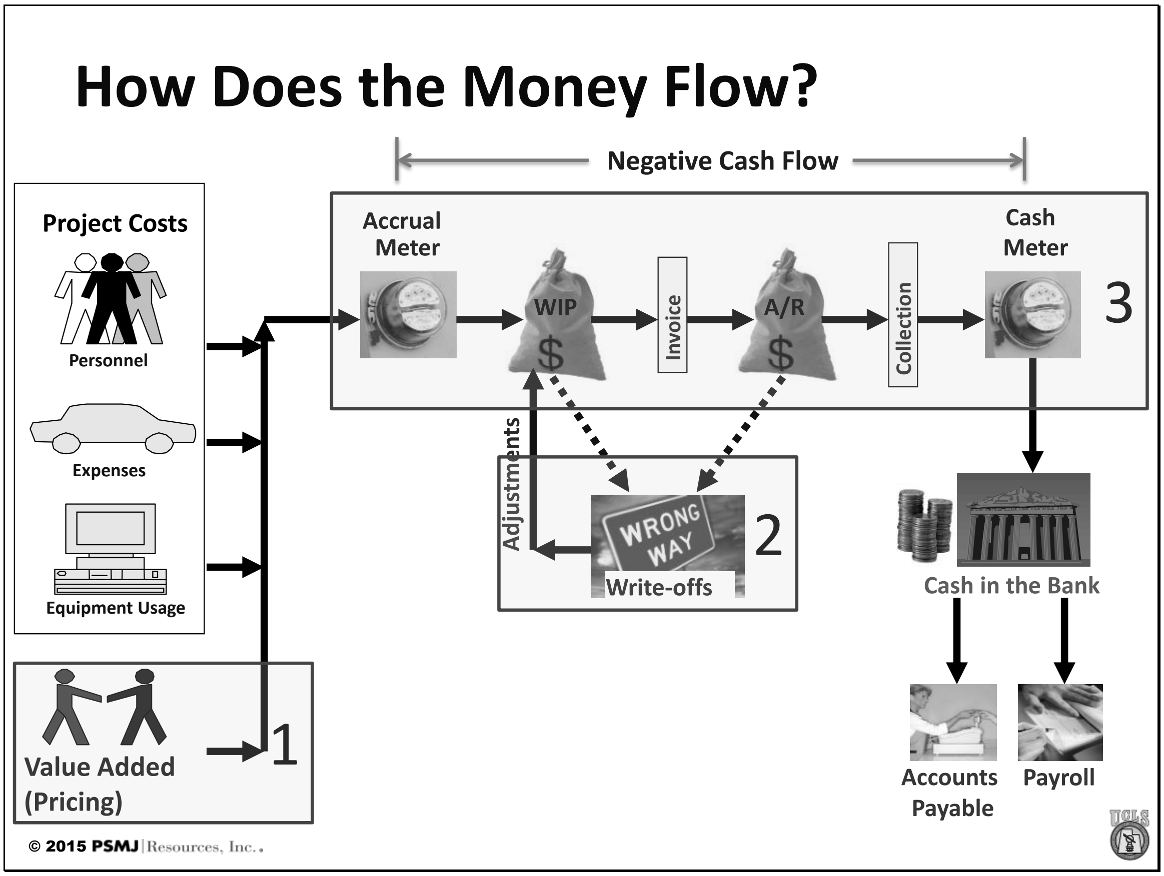
How Does the Money Flow?
Negative Cash Flow
Project Costs
Personnel
Expenses
Equipment Usage
Value Added (Pricing)
1
Accrual Meter
WIP
Invoice
A/R
Collection
Cash Meter
3
Adjustments
WRONG WAY
Write-offs
2
Cash in the Bank
Accounts Payable
Payroll
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How Does Your Firm's Project Financial Performance Compare?

Benchmark	Median Firm*	Median Canadian Firm	Circle of Excellence Median	Your Firm
Labor utilization (based on payroll $$$)	58.8%	66.9%	63.6%	
Target direct labor multiplier	3.10	3.00	3.20	
Net achieved direct labor multiplier (net revenue ÷ D.L.)	3.09	2.66	3.38	
Net revenue surplus (deficit) as a % of net revenue	-1.0%	-4.9%	+3.8%	
WIP days	16	15	15	
A/R collection days	67	79	58	
Operating profit (% of net revenue before bonus & tax)	14.3%	15.6%	28.4%	

*Consists of 93% U.S., 6% Canadian, 1% outside North America
Source: 2015 PSMJ Financial Performance Survey

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Leading the Project Team

Leadership

- Develop new ideas
- Do the right things
- Inspire people

Management

- Turn ideas into reality
- Do things right
- Direct people

Ensure Key Staff Are Available at Critical Points

When the lead is identified
- Identify key team leaders

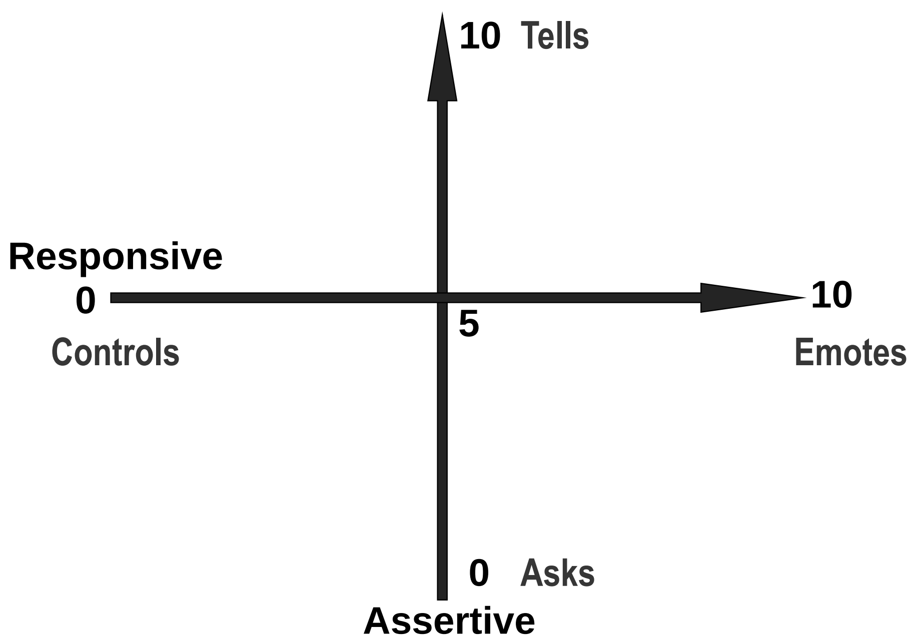
During proposal preparation
- Get tentative commitments for key team members

When the contract is signed
- Finalize the tentative commitments
- Get commit-ments for key milestone dates

During the project
- Do regular staffing forecasts
- Remind key people of their commitments

If you want the best people on your team, make them <u>want</u> to work on your project.

Personality Traits



Your Personal Leadership Assessment

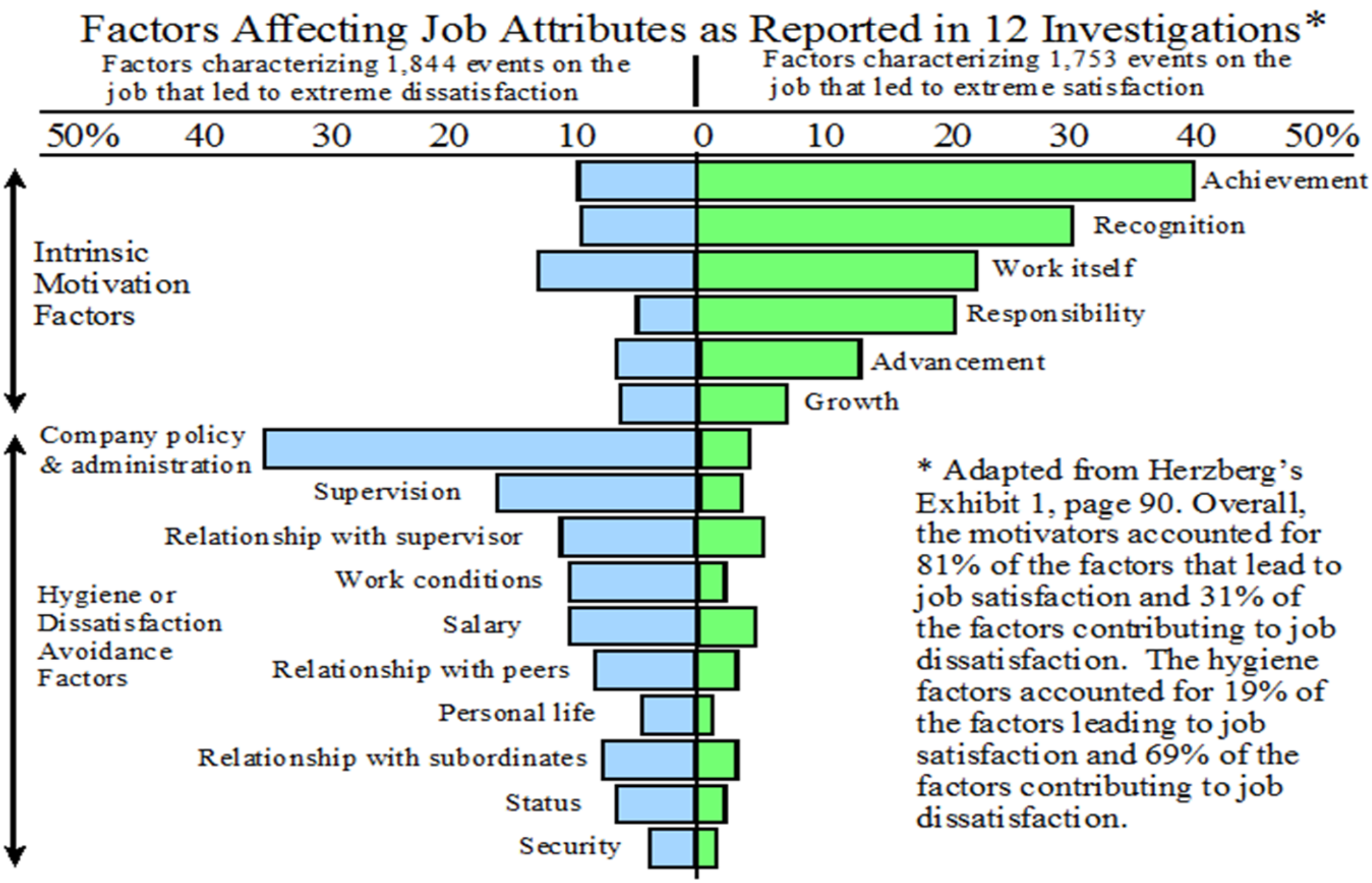
Score your behavior for each area of leadership on a scale of 5 down to 1 as follows:

5 = You exhibit these behaviors 90% or more of the time (upper end)
4 =
3 =
2 =
1 = You exhibit these behaviors 10% or less of the time (lower end)

Give yourself one score for each practice area

Leadership Practice Areas	Your Assessment (1-5)
Model the way	
Inspire a shared vision	
Challenge the process	
Enable others to act	
Encourage the heart	

ACCORDING TO FREDERIC HERZBERG…

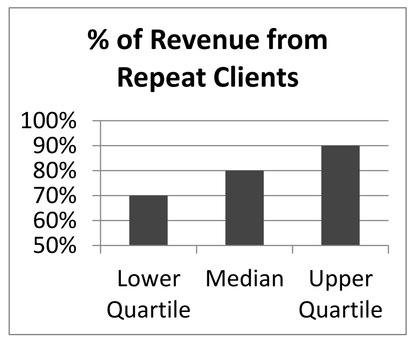


* Summary by Justin Gerber, Master of Accountancy Program, University of South Florida, Summer 2003

Managing Your Clients

It costs 10-15 times more to get a dollar of revenue from a new client than from an existing one.

-- PSMJ Research



Most Clients Are Quite Satisfied With Their A/E Consultants

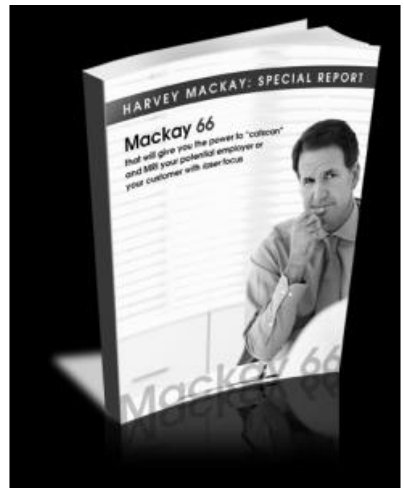
Rating Scale

Source: Client Feedback Tool results for 2013-14. Data is from over 200 A/E firms and 10,000 clients.

Category	25th %ile	Median	75th %ile
Responsiveness	5.51	5.82	6.10
Helpfulness	5.20	5.60	5.89
Quality	5.13	5.59	5.85
Accuracy	5.10	5.56	5.74
Scope and Fees	5.05	5.46	5.82
Schedule	4.90	5.39	5.72
Budget Performance	4.79	5.28	5.55

How Well Do You Know Your Client?

1. Who does your client report to?
2. What is their organizational structure?
3. What are their strategic drivers?
4. Where do the decision makers sit?
5. What do they value & expect in their relationship with you?
6. What do they read?
7. What is their career path?
8. What are their outside interests?
9. What hassles can you remove from their life?



Check out the "Mackay 66 Customer Profile"
(www.harveymackay.com)

Get Firm Commitments from Your Client

Information Required from the Client	Target Date	Actual Date
As-Built Drawings	2/5/14	
Utility Connection Info	3/1/14	
Design Standards	3/15/14	

Client Decisions Needed	Target Date	Actual Date
Site entrance location	4/10/14	
Lab ceiling height	5/5/14	
Site lighting type	6/8/14	

FREEZE MILESTONES

EXAMPLE OF A 1-PAGE WEEKLY PROGRESS REPORT

To: Jim Alexander
Cc: Rick Hernandez
Subject: Weekly Progress Report

What We Accomplished Since Last Week's Report

- Received contractors' responses to questions
- Project team meeting with USAF to discuss contractor's responses
- Project team and USAF met with contractors to discuss contractors' input
- USAF PM provided notice to proceed to 95% design

What We Will Accomplish Next Week

- Contract with cost engineering sub for independent cost estimate per USAF request
- Work on 95% design submittal
- Our PIC will meet USAF Chief Engineer

Scope Changes to Date

- Acquisition process change to modified 2-step process
- Increase the gross building area by 3,000 square feet
- Independent cost estimate by cost engineering specialist. PM will prepare change management form.

Schedule/Deliverable Status

- I will prepare revised schedule and coordinate with USAF by 17 Aug.

Budget Status

- See most recent earned value report
- See added value matrix

Input Needed From Client/Others

- None for now

Other Issues/Concerns

- Per contractors' review comments, project construction cost estimate is over USAF's budget

Invoice Summary

- Invoice payments are up to day. Thank you for your prompt payments.

David Chen, P.E.
ABC Designers, Inc.
2746 Elm Street
Atlanta, GA 55555
Phone: 770-555-5555
Cell: 678-555-5555
E-mail: dchen@abcdesigners.com

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Specific Challenges in Planning Different Types of Projects

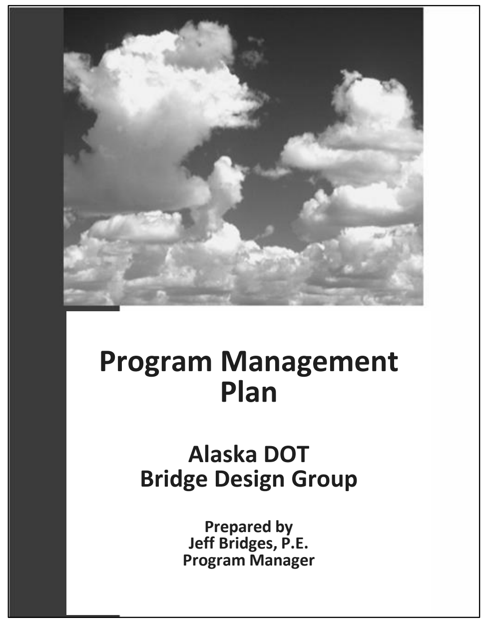
Do you sometimes feel like Noah?

Managing Multiple Projects Effectively

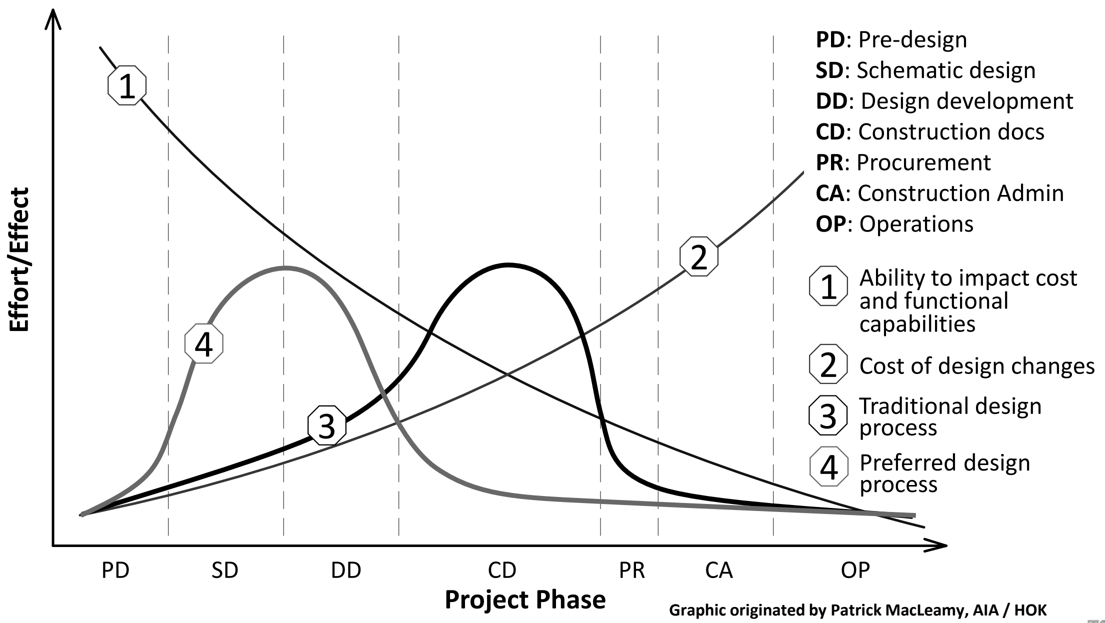
1. Assign an Assistant PM on every project
2. Standardize your life
   - Work processes
   - PMPs
   - Progress reports
   - Technical details
3. Use para-professionals (PM Assistant)

Managing Multiple Projects for the Same Client…

- Develop a "Program Management Plan"
- This is not a contract.
- Best developed after completing a few projects
- What does the client want to be done consistently on all their projects?
- What do we want from this relationship?



Owners Want to Move the Curve Forward?



Graphic originated by Patrick MacLeamy, AIA / HOK

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Conduct a "0% Review" With Your PIC

1. Gain concurrence on your PMP
2. Get commitment for resources
3. Decide how PIC should stay in touch with client
4. Work out any conflicts
   - ✓ Technical work plan
   - ✓ Work-sharing using other business units

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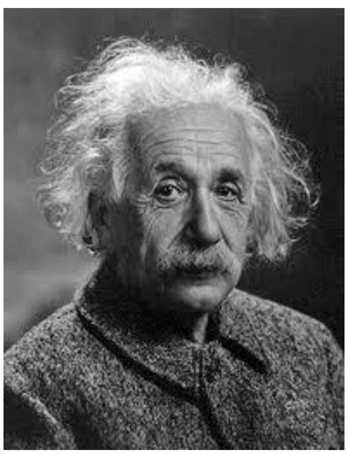
Implementing this Seminar



"Insanity: Doing the same thing over and over again and expecting different results."

- Albert Einstein

Link

Tools of the Best PMs

1. Project Management Plans
2. Detailed Work Breakdown Structures
3. Proactive Client Communication
4. Earned Value Analysis*
5. Change Management Process*
6. PM / Principal Project Reviews

*** Taught in 2-Day PM Bootcamp**

Get more. Learn more.

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