

Using Project Management Principles to Ensure Successful Collaborations

Jami Yazdani

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the EXCHANGE

an ALCTS/LITA/LLAMA Collaboration

MAY 4, 6, & 8 2020

Building the
Future Together

Jami Yazdani

- More than 15 years in academic libraries, including 12 years in leadership roles
- MLIS from Louisiana State University
- Masters in Technology Management from UMUC
- Project Management Professional Certification from the Project Management Institute

yazdaniconsulting.com

Agenda

- Project Management Basics
- Project Management Principles
- How to Apply to:
 - Projects
 - Committees
 - Meetings
- COVID-19 World Questions

Successful Collaborations Using Project Management Principles

Keys to Success	<ul style="list-style-type: none"> ➤ Establish a shared vision of success <ul style="list-style-type: none"> ○ What is your team's main purpose? ○ What will we accomplish? ➤ Develop a realistic and flexible plan to work towards that vision <ul style="list-style-type: none"> ○ Set, document and share clear expectations and deadlines ○ Break larger goals into actionable tasks and activities ➤ Support consensus <ul style="list-style-type: none"> ○ Plan for broadly sharing information with all stakeholders ○ Allow for discussion and feedback
Useful Project Management Principles	<p>Scope: What is relevant to our purpose and goals? → Discuss, Document and Remind to maintain team's focus</p> <p>Deliverables: What will we deliver/accomplish/create? → Clearly define and let guide tasks and activities → Review, document and share progress</p> <p>Schedule: When is our work complete? When have we achieved success? → Be specific and flexible, building in time for things to go wrong</p> <p>Communications: Who needs to know? How and when? → Be clear and allow for feedback</p>

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How to Apply Project Management Principles to Ensure Successful Collaborations

Scope	Deliverables	Schedule	Communications
<ul style="list-style-type: none"> ◆ Discuss and clearly define a scope as early as possible 	<ul style="list-style-type: none"> ◆ Discuss and clearly define deliverables ◆ Break deliverables into actionable tasks 	<ul style="list-style-type: none"> ◆ Use a schedule to set and follow progress towards task completion ◆ Be realistic and allow flexibility in setting timelines and due dates 	<ul style="list-style-type: none"> ◆ Use clear communication to assign and follow-up on tasks ◆ Share progress toward deliverables ◆ Conduct a retrospective to document lessons learned for future projects
<ul style="list-style-type: none"> ◆ Clearly define a scope, tying it in to larger mission and purpose ◆ Review scope or purpose regularly 	<ul style="list-style-type: none"> ◆ Set goals (for meetings, reports, outcomes) ◆ Use goals to create actionable tasks 	<ul style="list-style-type: none"> ◆ Create and use meeting agendas ◆ Summarise and document decisions and tasks 	<ul style="list-style-type: none"> ◆ Share and document accomplishments ◆ Allow for discussion and feedback
<ul style="list-style-type: none"> ◆ Clearly define the meeting's purpose 	<ul style="list-style-type: none"> ◆ Direct the focus to meeting outcomes 	<ul style="list-style-type: none"> ◆ Create and use meeting agendas 	<ul style="list-style-type: none"> ◆ Allow for discussion and feedback ◆ Summarise and document decisions and tasks
Attending a Meeting	<ul style="list-style-type: none"> ◆ Ask questions that point the team back to the scope, purpose or desired outcomes 	<ul style="list-style-type: none"> ◆ Before the meeting ends, ask that decisions and next steps be summarised and reviewed 	<ul style="list-style-type: none"> ◆ Ask that specific dates be assigned to task deadlines and future meetings ◆ Contribute items to the agenda ◆ Offer to document decisions and next steps ◆ Share documents and notes with meeting leader or team

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Exchange Blog Post:
*Ensuring Successful Collaborations
 During and After COVID-19*

Poll:
**What is the
biggest
challenge
facing your
collaborative
endeavors?**



Why Project Management?

PM helps us
create and **work**
toward
a shared vision
of success



PMI: Project Management Institute

PROJECT:

A temporary endeavor undertaken to create a unique product, service or result.

PROJECT MANAGEMENT:

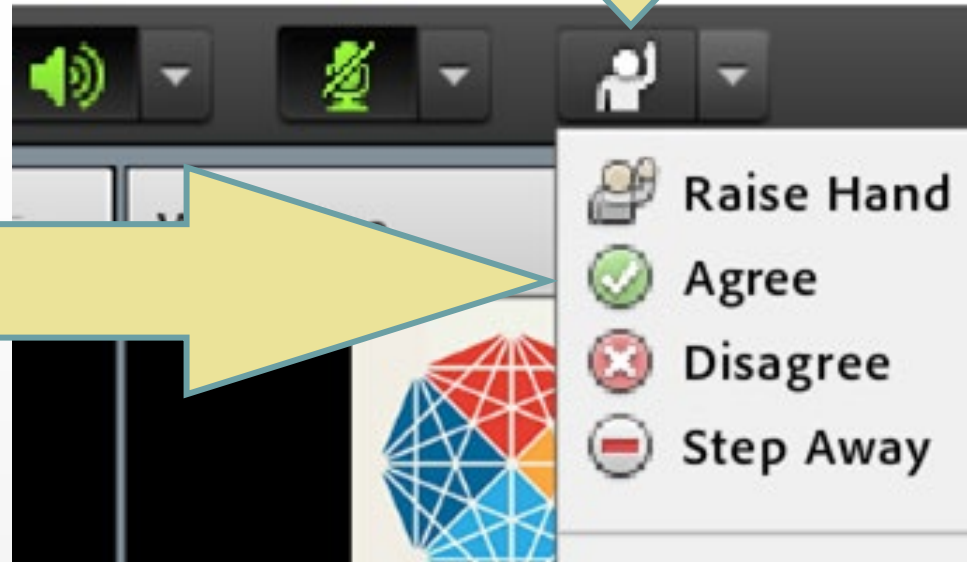
The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.



SUCCESS

Thinking about one recent project or committee or collaboration....

Agree or Disagree:
We have a shared vision of success.



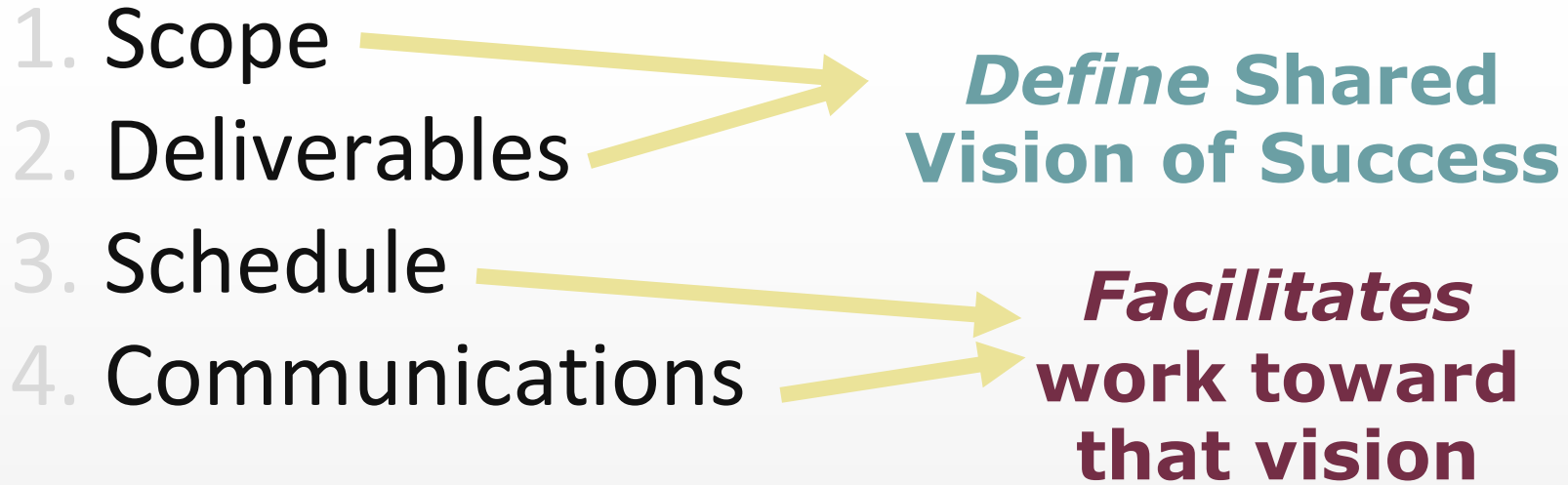
A collection of approximately 30-40 small, round wooden pins in various colors including green, blue, red, yellow, and pink. They are scattered across a light gray, textured surface. The pins have a slightly weathered or painted appearance.

Project Management Principles and Techniques

Knowledge Areas (for Project Planning)

1. *Project **Scope** Management*
2. *Project **Schedule** Management*
3. *Project **Cost** Management*
4. *Project **Quality** Management*
5. *Project **Resource** Management*
6. *Project **Communications** Management*
7. *Project **Risk** Management*
8. *Project **Procurement** Management*
9. *Project **Stakeholder** Management*
10. *Project **Integration** Management*

Most Useful PM Principles & Techniques



Scope:

Why we are working together

What is relevant

Where we will focus



Scope

Clearly define the scope of the team's work *early on*:

- What is our main purpose or goal?
- If possible, tie to or fit in with larger mission

1. Discuss

- Allows for buy-in

2. Document

- Encourages consensus and agreement

3. Remind

- Maintains focus
- Avoid Scope Creep

A close-up photograph of a nest made of dry, golden-brown straw. Several smooth, glossy Easter eggs in various colors are nestled within the straw. The colors include bright yellow, vibrant orange, deep blue, magenta, and lime green. The lighting is bright, creating soft highlights on the eggs' surfaces.

Deliverables:

What we will deliver/accomplish/create

What our output will be

Deliverables

- Clearly define what you will accomplish
 - How does this serve our scope?
 - Can add specifics as you go
- Let these guide the team's work/activities/tasks
 - Break into actionable tasks
- Review progress regularly
 - Document & share progress



Schedule:

When deliverables are due

When work is done

When success is achieved

Schedule

- Consider:
 - How long will we work together?
 - By when will we accomplish tasks?
- Document and Share

About setting expectations, so be realistic, specific and flexible

Communications:

Who needs to know

How and when they will need to know it



Communications

Plan for:

- Who
 - Internal & External
- How
 - Format?
- How Often

*About setting expectations, so be **clear** and **allow for feedback***



Discuss

Feedback

CONSENSUS

Document

Review

Share

Apply to a Project

Scope & Deliverables:

- Clearly defined
as early as possible
- Break deliverables into pieces >> pieces becomes tasks

Schedule:

- Use to set and follow progress towards task completion & document milestones
- Be realistic and allow flexibility

Communications:

- Use to assign and follow-up on tasks & document progress
- Share schedule and progress
- Retrospective

Apply to a

COMMITTEE: A team delegated to consider, investigate, take action on, or report on some matter

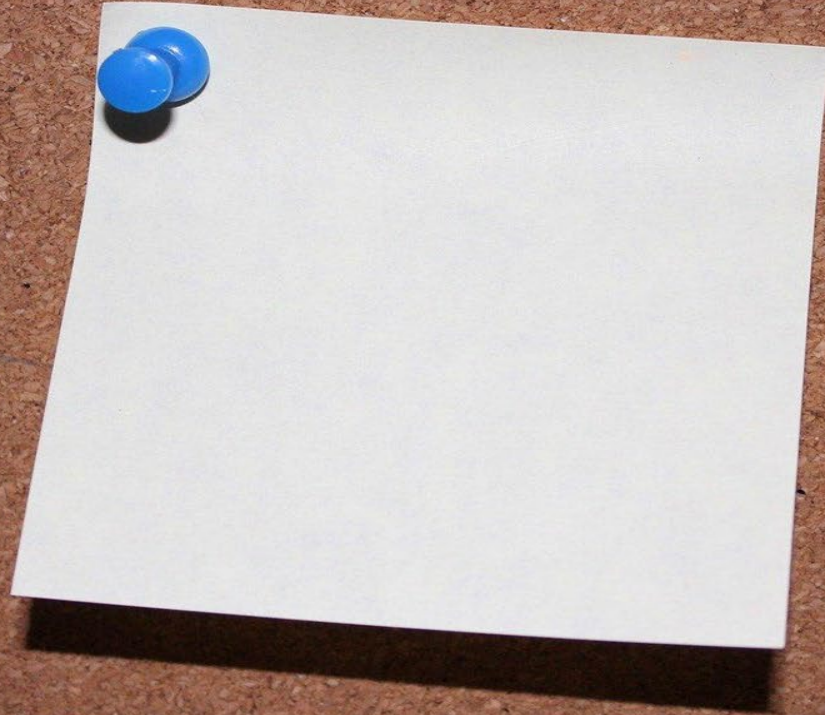
Scope & Deliverables:

- Clearly define scope & tie in to larger purpose
- Set goals & outcomes (meetings, reports)

Schedule & Communications:

- Use agendas and timelines
- Review scope and goals regularly
- Summarize and document decisions and tasks
- Share and document accomplishments
- Allow for discussion & feedback
 - *Idea Board/Parking Lot*

Ideas (*not*) to take
action on later:



Apply to a Meeting

Scope & Deliverables

- Clearly define meeting purpose
- Keep the agenda on track



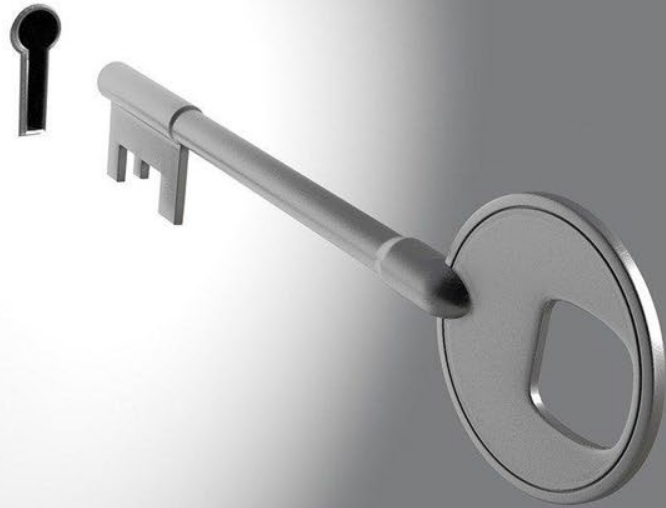
ations:

ack

ecisions, tasks

Poll:

**Is there a
strategy that
will be
useful to
your own
collaborative
endeavors?**





Think Broadly

Review Scope

Set a timeline for
decisions

**Is this still a
priority?**

**When should
we revisit?**

Go back to Fundamentals

Review, Discuss &
Modify Scope and
Deliverables

Revise Schedule

What does
SUCCESS
look like
now?

What will it
look like in **3**
to 6 months?

Focus on Quality Communication

Be clear

Be respectful

Be reasonable

**Allow for
discussion,
inquiry and
feedback**

**It's OK to
say that you
need more
time**

Thank you!

jami@yazdaniconsulting.com

yazdaniconsulting.com

Questions?



***the* EXCHANGE**

an ALCTS/LITA/LLAMA Collaboration

Thank you!

jami@yazdaniconsulting.com

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