

**Project and Priority Management**  
Dr. Jane Long  
Director,  
Learning/Training and  
Staff  
Development/Coaching  
American Dental  
Association

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**What is a Project?**

According to Franklin Covey, it is a temporary endeavor with a start and finish, undertaken to create a unique product, service or result.

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**Typically Projects Include....**

- A Project Manager
- An overall vision and goal
- A finite length
- Involve a number of activities
- Involve a great number of people/stakeholders
- Deadlines
- A budget

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**What Does Project Success Look Like?**

- Meets or exceeds expectations
- Optimizes resources – get creative when necessary
- Builds team confidence and engagement for future projects

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**Project Management Foundational Behaviors**

- Listen First
- Clarify Expectations
- Practice Accountability
- Demonstrate Respect

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**Framework for Project Management**

ENTER INITIATE PLAN EXECUTE MONITOR & CONTROL CLOSE EXIT

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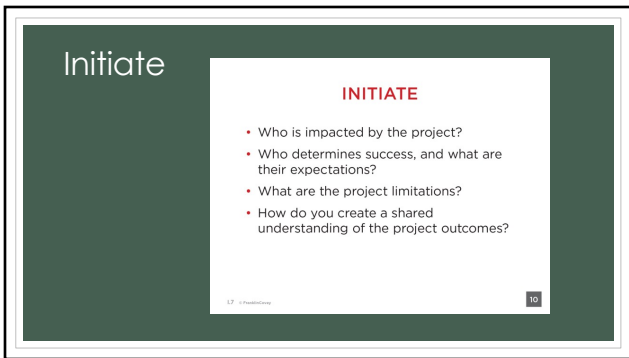
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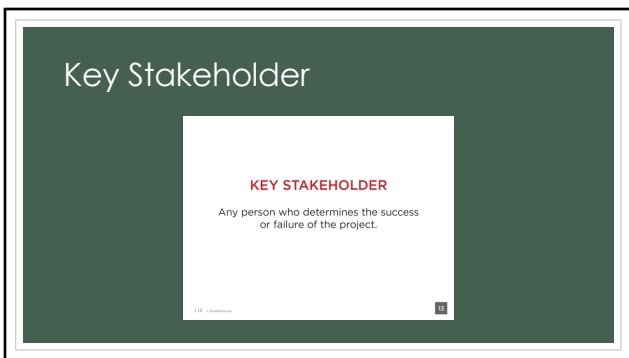
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## Key Stakeholder Attributes

**Key Stakeholder Attributes**

<b>DECISIONS</b>	They control or influence the project budget.
<b>AUTHORITY</b>	They provide permission to proceed.
<b>NEED</b>	They directly benefit from or are impacted by the project.
<b>CONNECTIONS</b>	They remove roadblocks or exert influence when needed to ensure project success.
<b>ENERGY</b>	Their positive or negative energy could affect project success.

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## Key Stakeholder Interviews

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## Areas of Possible Constraints

<p><b>SCOPE</b> The sum of the products, services, and results to be provided.</p> <p><b>BUDGET</b> The approved estimate for the project.</p>	<p><b>QUALITY</b> The degree to which project characteristics fulfill requirements.</p> <p><b>RISK</b> An uncertain event or condition that, if it occurs, has an effect (usually negative) on project results.</p>	<p><b>RESOURCES</b> People (individuals or teams), equipment, services, or supplies needed to fulfill requirements.</p> <p><b>TIME</b> The deadlines by which products, services, and results are to be delivered.</p>
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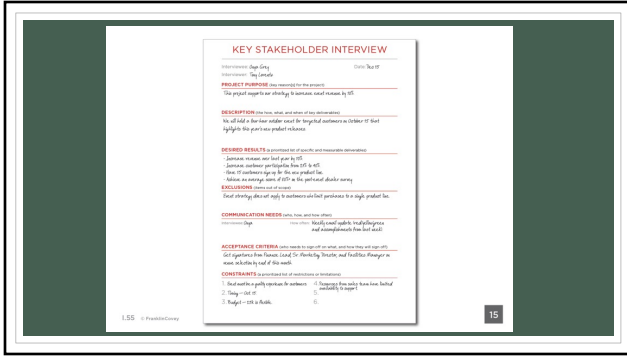
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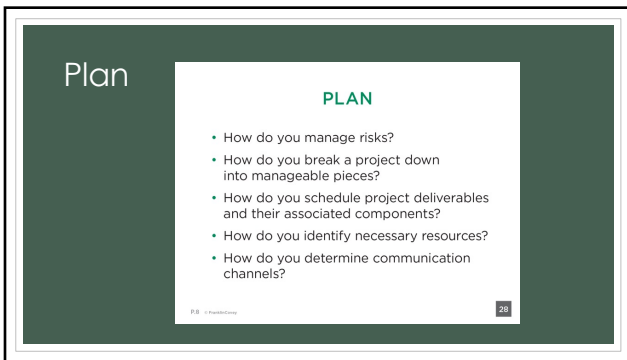
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### Options for Reducing/Eliminating Risk

<b>TRANSFER</b>	Shift the risk to a third party.
<b>ACCEPT</b>	Acknowledge the risk and deal with it, if it occurs.
<b>MITIGATE</b>	Lessen the risk by reducing probability or impact.
<b>ELIMINATE</b>	Remove the risk.

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### Risk Assessment Tool

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### Creating a Project Schedule

#### Elements of a Project Schedule

- Develop the Work Breakdown Structure (WBS).
- Sequence activities.
- Identify and assign resources.
- Estimate duration.
- Identify the critical path.

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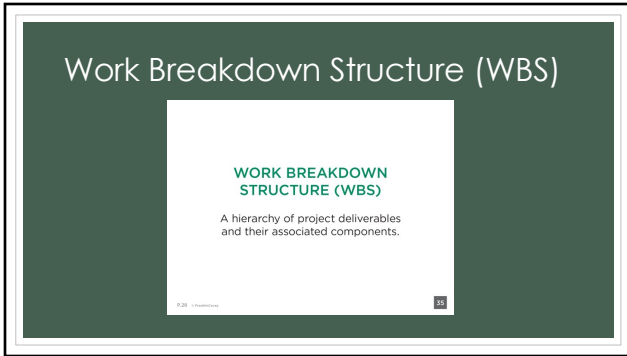
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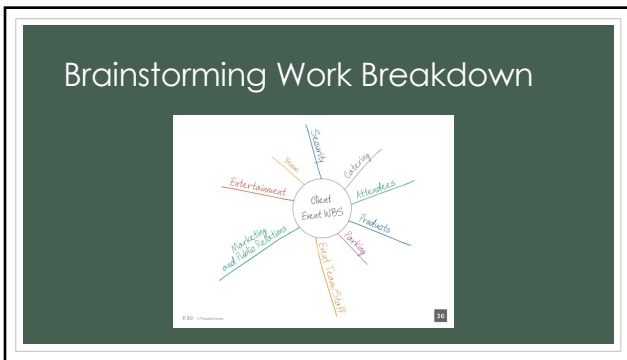
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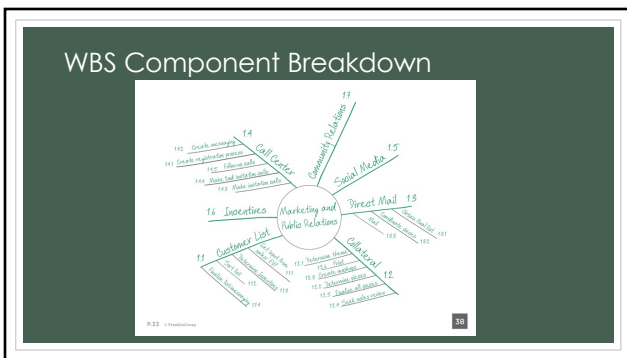
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## Estimate Work and Duration

**WORK**

The amount of effort (minutes, hours, days) needed to accomplish a task.

**DURATION**

The period of time needed to get the work done from start to finish.

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## Estimating Duration

**Estimate Duration**

- Draw on your experience.
- Ask a reference.
- Outsource with an expert.

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## Annual Customer Event

ID	STATUS	IN CODE	DELIVERABLES/COMPONENTS/ACTIVITIES	PRE-DECISION	WORK HOURS	DURATION	START DATE	END DATE
1			Annual Customer Event					
101			Get input from Sales VP		8	8 days	10/24	11/24
102			Start list creation or approval of list	101	8	8 days	10/24	11/24
103			Telephone numbers based on website	101	4	4 days	10/24	11/24
104			Finalize list and accuracy	101	8	8 days	10/24	11/24
105			Outreach		16	16 days	12/24	1/25
106			Telephone direct messaging	104	8	8 days	10/24	11/24
107			Telephone phone	104	8	8 days	10/24	11/24
108			Direct mail ups	104	8	8 days	10/24	11/24
109			Send sales notes	104	4	4 days	10/24	11/24
110			Finalize all direct mail or broadcast	104	16	16 days	10/24	11/24
111			Direct Mail		16	16 days	10/24	11/24
112			Direct Mail and list and accuracy	104	16	16 days	10/24	11/24
113			Direct Mail		8	8 days	10/24	11/24
114			Direct Mail		8	8 days	10/24	11/24
115			Direct Mail		8	8 days	10/24	11/24
116			Direct Mail		8	8 days	10/24	11/24
117			Direct Mail		8	8 days	10/24	11/24
118			Direct Mail		8	8 days	10/24	11/24
119			Direct Mail		8	8 days	10/24	11/24
120			Direct Mail		8	8 days	10/24	11/24
121			Direct Mail		8	8 days	10/24	11/24
122			Direct Mail		8	8 days	10/24	11/24
123			Direct Mail		8	8 days	10/24	11/24
124			Direct Mail		8	8 days	10/24	11/24
125			Direct Mail		8	8 days	10/24	11/24
126			Direct Mail		8	8 days	10/24	11/24
127			Direct Mail		8	8 days	10/24	11/24
128			Direct Mail		8	8 days	10/24	11/24
129			Direct Mail		8	8 days	10/24	11/24
130			Direct Mail		8	8 days	10/24	11/24
131			Direct Mail		8	8 days	10/24	11/24
132			Direct Mail		8	8 days	10/24	11/24
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137			Direct Mail		8	8 days	10/24	11/24
138			Direct Mail		8	8 days	10/24	11/24
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142			Direct Mail		8	8 days	10/24	11/24
143			Direct Mail		8	8 days	10/24	11/24
144			Direct Mail		8	8 days	10/24	11/24
145			Direct Mail		8	8 days	10/24	11/24
146			Direct Mail		8	8 days	10/24	11/24
147			Direct Mail		8	8 days	10/24	11/24
148			Direct Mail		8	8 days	10/24	11/24
149			Direct Mail		8	8 days	10/24	11/24
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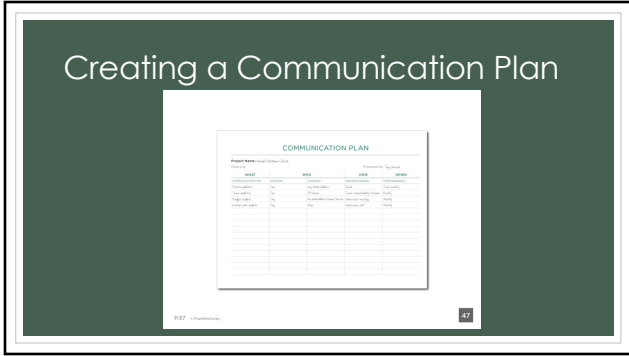
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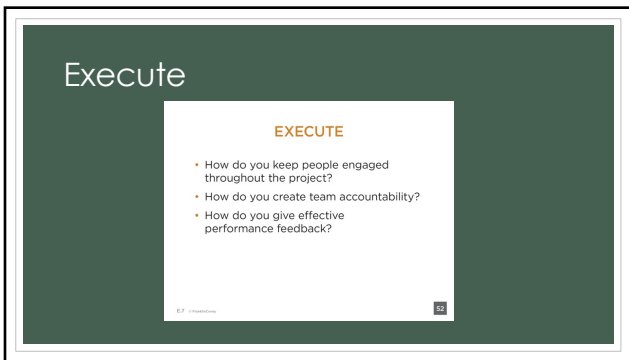
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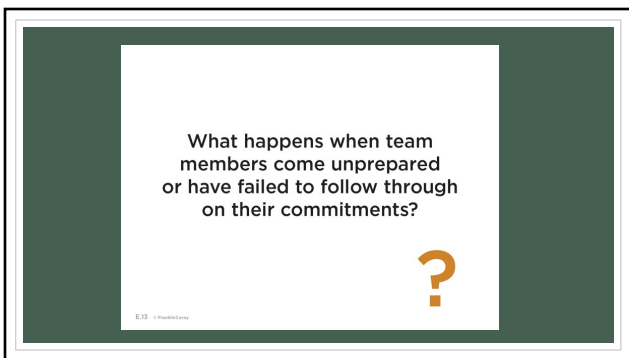
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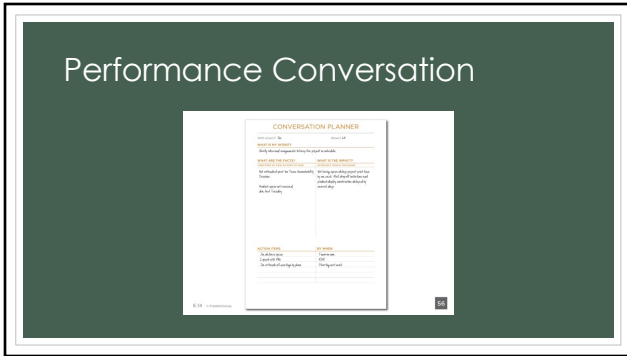
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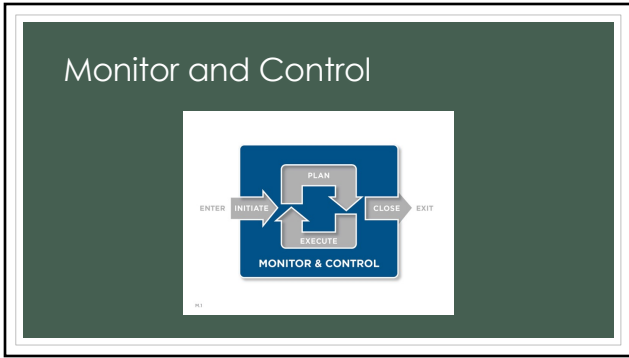
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### PROJECT STATUS REPORT

Project Name: *Acad Software Dev*      Date: *08/01/00*  
 Prepared by: *Raymond*      Prepared for: *Raymond*

**OVERALL PROJECT HEALTH**  
 Critical    Serious    Concern

DELIVERABLES	STATUS	NOTES
Analysis: IT		
Analysis		
Plan		
Code Accep. Insp		
Development		
Hardware		
Network		
Security		
Quality		

CLEAR THE PATH	ACTION	WHO	DATE
Obtain 10% of budget for budget	Submit budget for review	Raymond	7/26/00
Resolve 10% of problems with client processes	Submit contract	Raymond	7/26/00
Secure 10% of budget for budgeted activities	Finalize contract	Raymond	7/26/00

M.B. & Associates/Company      62

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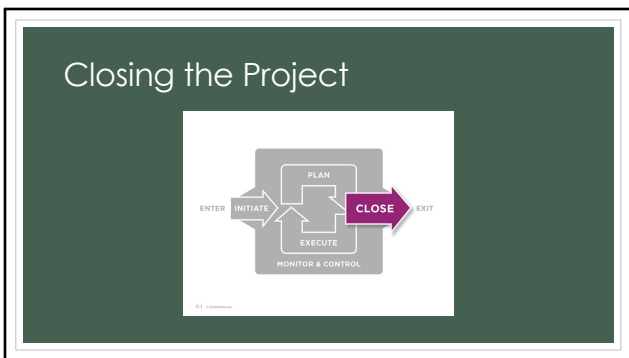
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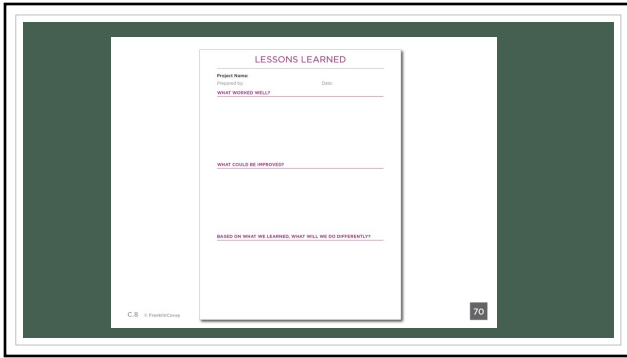
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“All things are created twice; first mentally; then physically. The key to creativity is to begin with the end in mind, with a vision and a blue print of the desired result.” — Stephen Covey

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STRATEGIES TO SUCCESSFULLY MANAGING PRIORITIES

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WHAT ARE YOUR CHALLENGES WITH PRIORITIZING?

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### Why Prioritize?

- Prioritization is the key to getting the most from your day, and from your team. Without clear priorities, you can end up bouncing from one activity to another, only doing what's easy, or focusing on other people's priorities rather than your own – after all, there's always that urgent email or that insistent phone call!

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### Importance of Prioritization

-  Creates a sense of calm and space in your life
-  Time is limited and demands are endless
-  Assists in allocating time where most needed
-  Brings order to chaos and reduces stress
-  Improves productivity

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### Determining the Value of Tasks

-  Determine your customers and their importance.
-  Who will benefit most from the completion of this task?
-  Once complete, what contribution will this make to your organization?

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### Quick Exercise

- What low-value tasks, including urgent but not important ones, have you completed in the last two working days?
- What important high-value tasks have you not done?
- What does this tell you about how you should prioritize in the future?



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## TOOLS FOR PRIORITIZATION

Tasks and Values

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### Prioritized To Do List

TO DO	TO DO	TO DO
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
DATE: _____	DATE: _____	DATE: _____

- Create the list of all tasks – including personal tasks
- Update daily!
- If too many high priority tasks review again to see if some may be downgraded.

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Using the Action Priority Matrix

- The Action Priority Matrix is the second "must have" prioritization tool. It helps you think about how you spend your time so that you can reallocate it, if necessary, to make the most of your time, energy and talents.



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THE TIME MATRIX

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**Q2** EXTRAORDINARY  
PRODUCTIVITY

- Proactive work
- High-impact goals
- Creative thinking
- Planning
- Prevention
- Relationship building
- Learning and renewal

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**Q2 PLANNING**

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Many Tools for Planning and Execution

- Outlook – Calendar and Tasks
- Monday.com – provides organization and prioritization
- Digital planners
- Paper Planners
- Other systems/tools?

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What can you do to prioritize your life?  
What commitments will you make?

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“  
The first step to success is knowing your priorities.  
”  
ASPEH  
WEBSITEHINK.COM

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