

# Project Management for Planners:

*How Project Management is Like Adventure Motorcycling*

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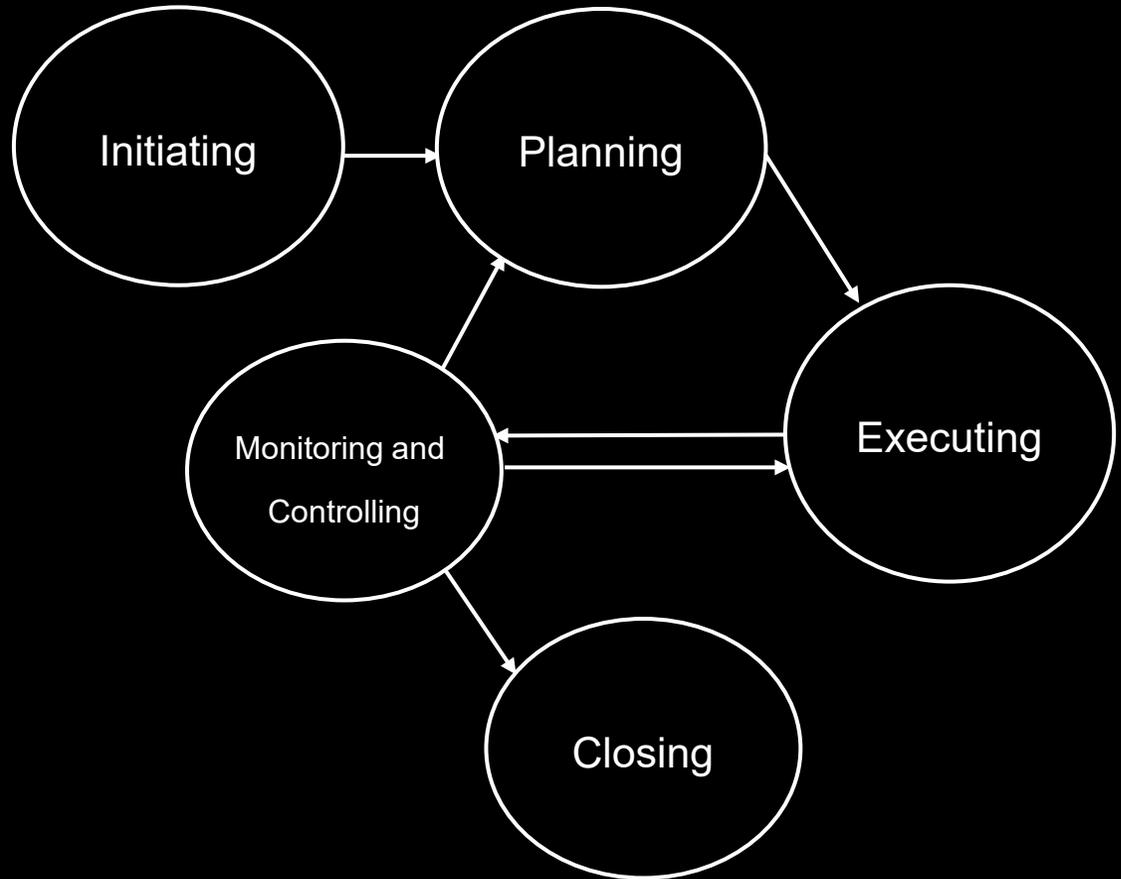
# Introduction

- Combining four of my strongest passions:
  1. Planning
  2. Project Management
  3. Adventure Motorcycling
  4. My wife, Susie
- Introduction to project management and refresher of key concepts



# Agenda

- Introduction
- Groundwork
- Initiating
- Planning
- Executing
- Monitoring & Controlling
- Closing
- Wrap-Up & Questions



# Introduction

Project Title	Schedule	Duration	Cost	Deliverable
Patagonia, Andes, Tierra del Fuego	Feb 9-26, 2013	18 days 2,500 miles	\$\$\$\$	1 <sup>st</sup> motorcycle adventure
Alps, Vienna, Prague	June 12 – July 4, 2016	23 days 1,300 miles	\$\$\$	1 <sup>st</sup> couple adventure
Canadian Maritime Provinces, Newfoundland, Quebec	June 23 – July 23, 2017	31 days 5,300 miles	\$\$	Motorcycle and fly
Balkans – Romania, Serbia, Bosnia & Herzegovina, Croatia, Slovenia, Italy, Montenegro, Bulgaria	Aug 21 – Sept 25, 2018	36 days 3,300 miles	\$\$	Longest duration, most exotic and challenging
Ireland & Scotland	Sept 15 – Oct 12, 2019	28 days 1,560 miles	\$\$\$	Family history

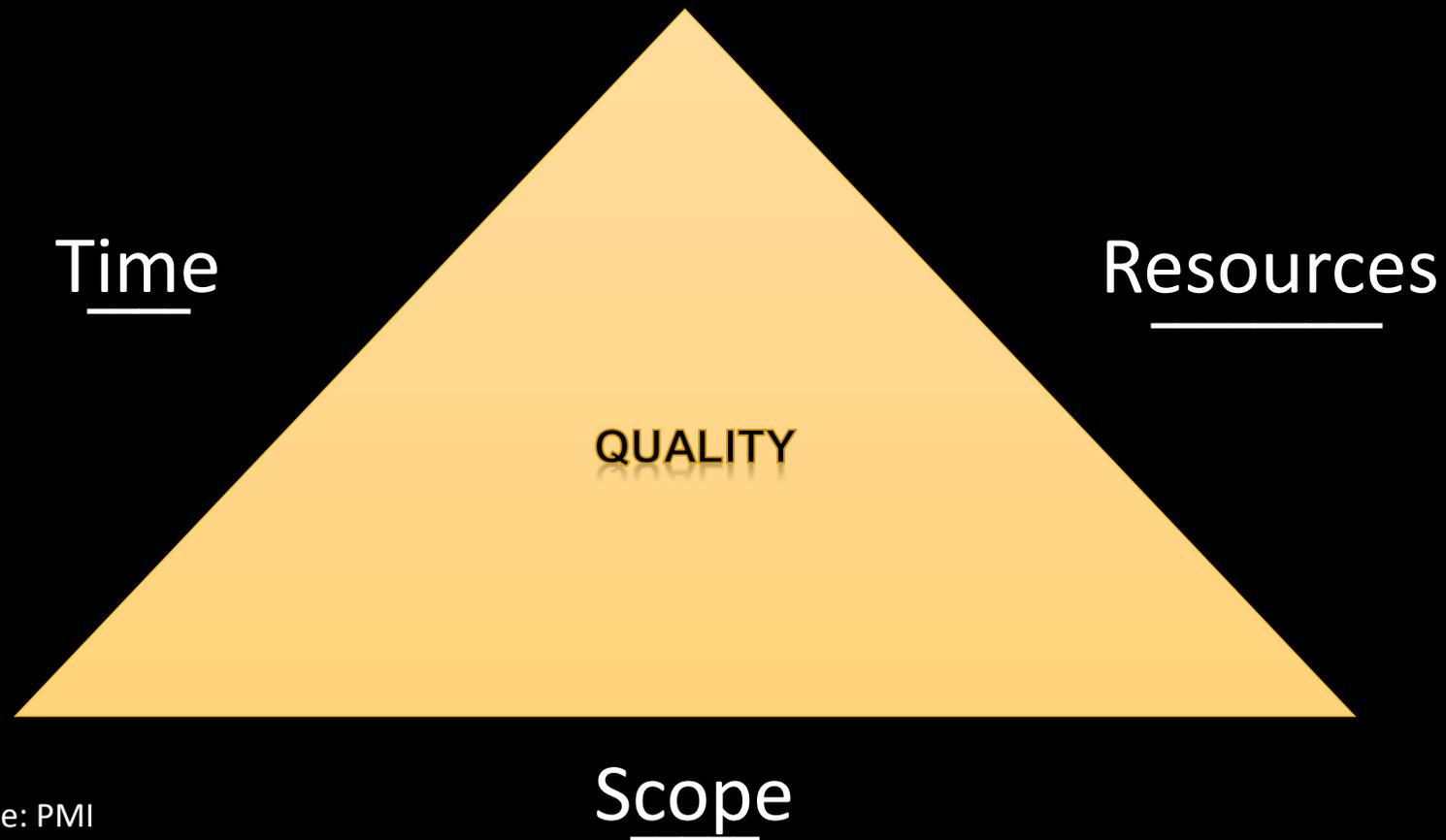


# What is a Project vs. Program?

- Project – a temporary endeavor undertaken to create a unique product or service.
  - (with a definite beginning and end )
- Program – a group of projects managed in a coordinated way to obtain benefits not available from managing them individually.

Source: PMI

# The “Triple Constraint”



Source: PMI

# Do These Three Things To Be A Successful Project Manager!

1. **COMMUNICATE** everywhere and all the time
2. Start all of your projects with a **PROJECT CHARTER**
3. Create and use a **WORK BREAKDOWN STRUCTURE (WBS)**



# What one thing do these activities have in common?

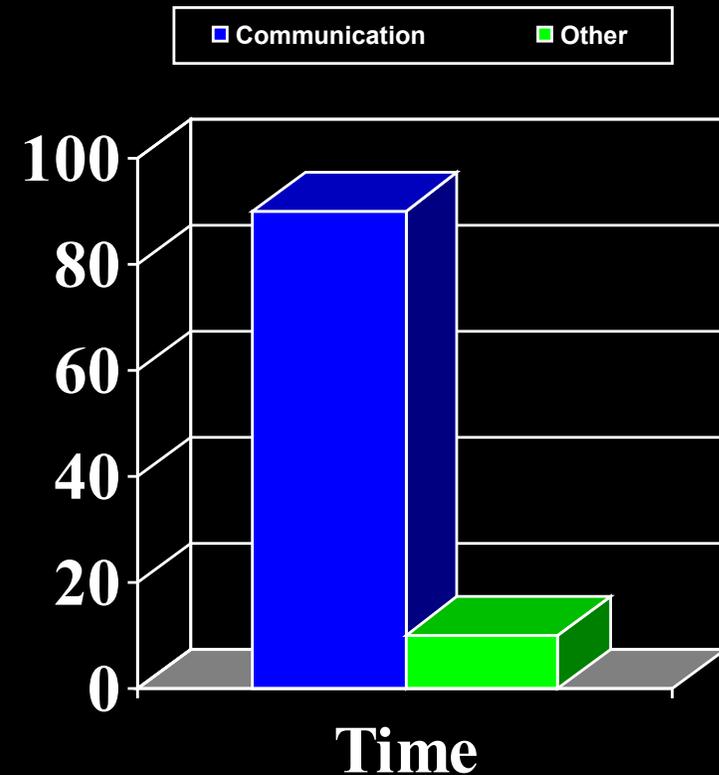
- Planning
- Project Management
- Adventure Motorcycling
- Traveling with your significant other

## Risk Management



# What is a Project Manager?

- 90% of a project manager's time is spent on communication to:
  - Project team
  - Upper management
  - Customers
  - Internal and external stakeholders



Source: The Gardner Group

# Poor Communication Leads to Project Failure – “Drifty”

- *“Ineffective communications is the primary contributor to project failure one third of the time, and had a negative impact on project success more than half the time.”*

Source: *The Way Forward*, PMI, 2013

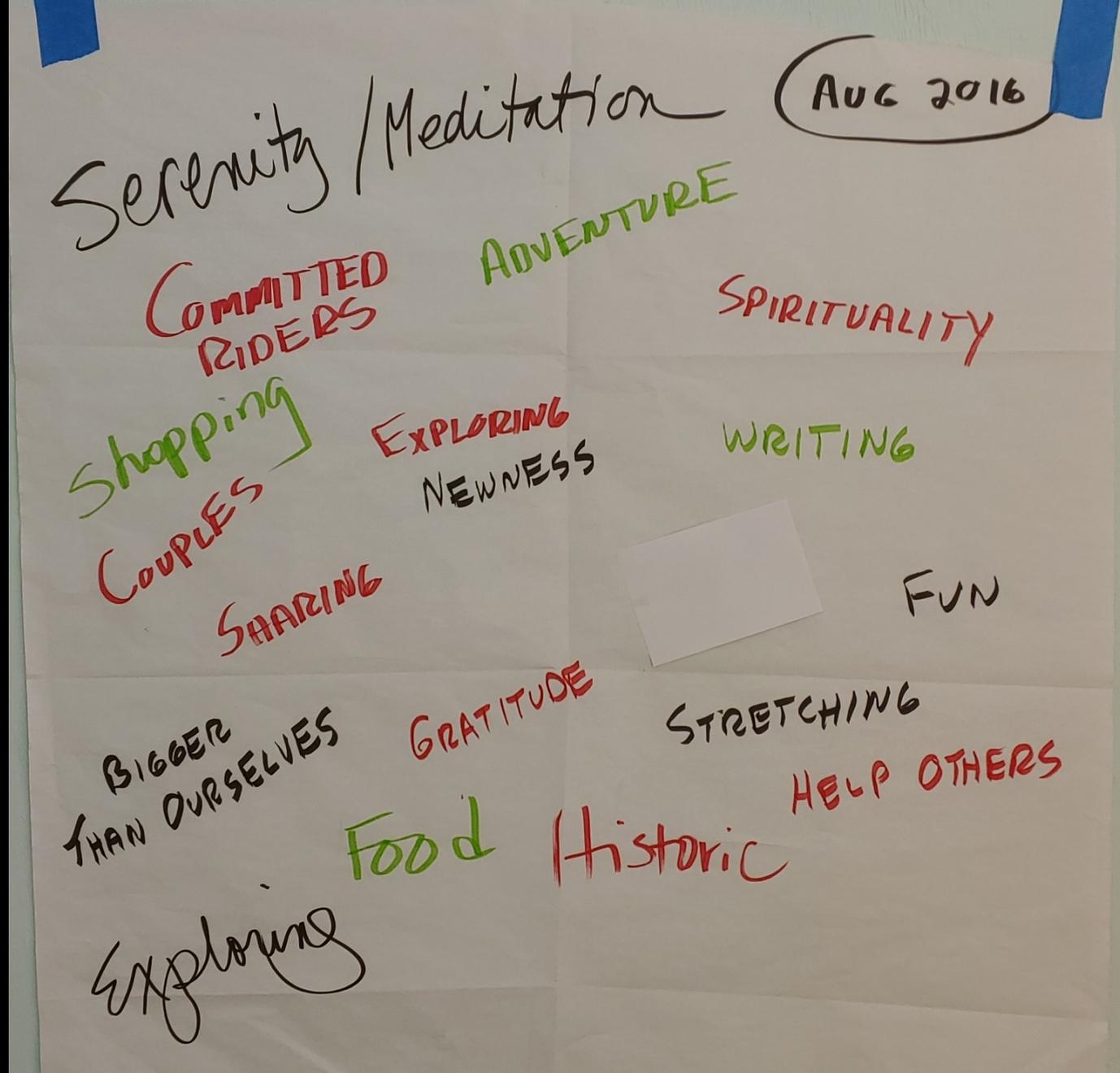


# Groundwork



# Why Do You Want to Be a Project Manager or Adventure Motorcyclist?

- Values
- Bigger than you
- Motivators
- Personal
- Sustain you during tough times



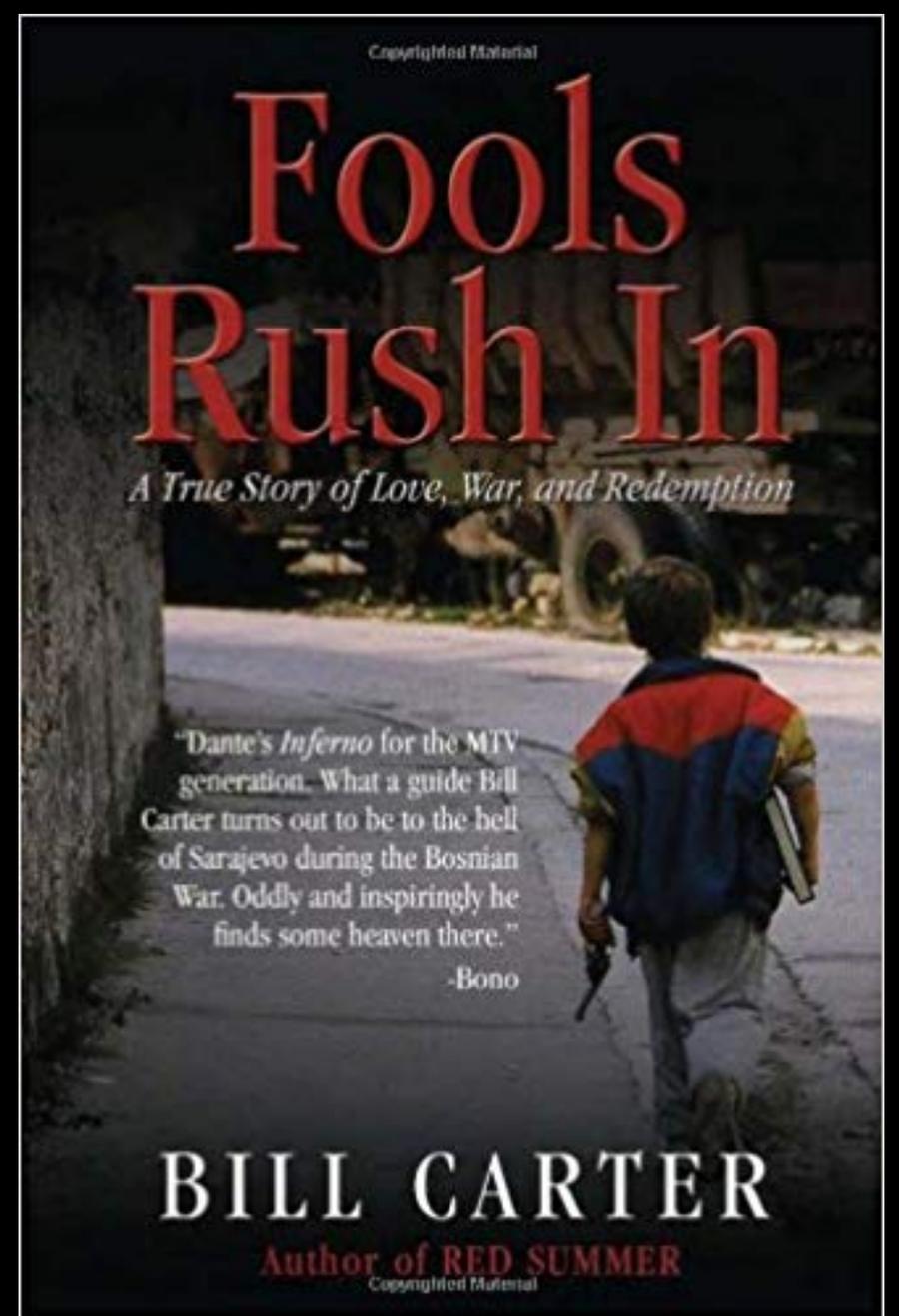
# Getting Started



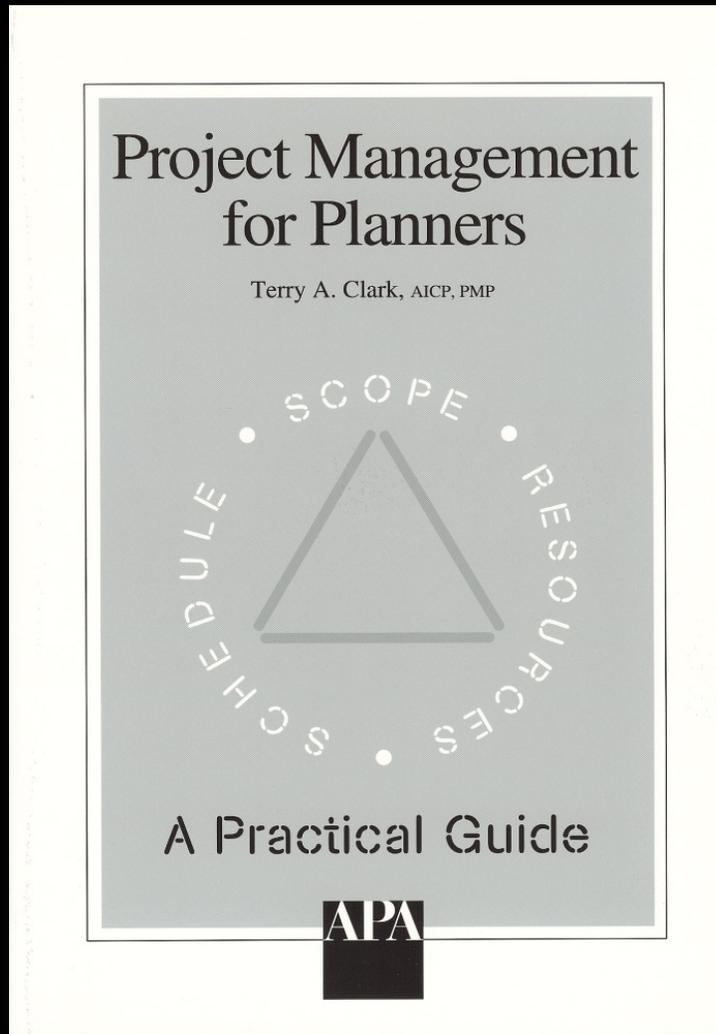
# Continuous Learning – For Rookies and Veterans

- Get experience
- Learn the basics - volunteer
- Start small – church, Scouts, neighborhood
- Study
- Project Management Institute ([pmi.org](http://pmi.org))
- Get certified
- It takes at least 10 years to get 10 years of experience

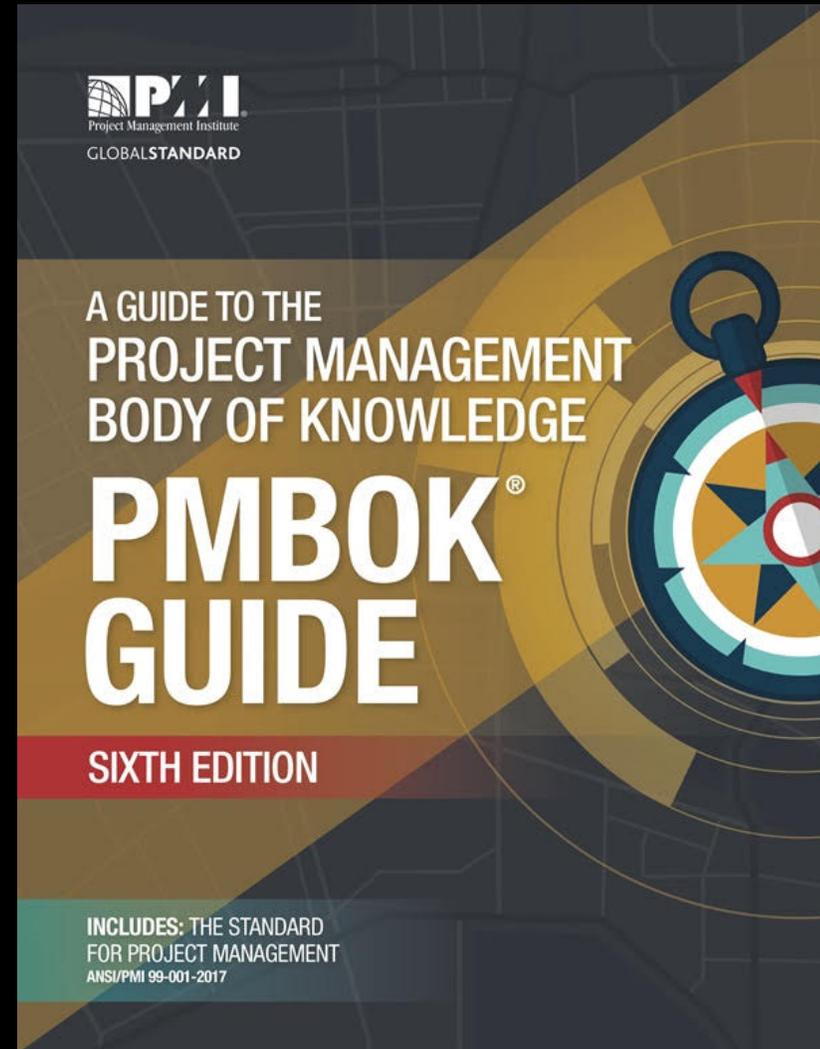




# Shameless Plug

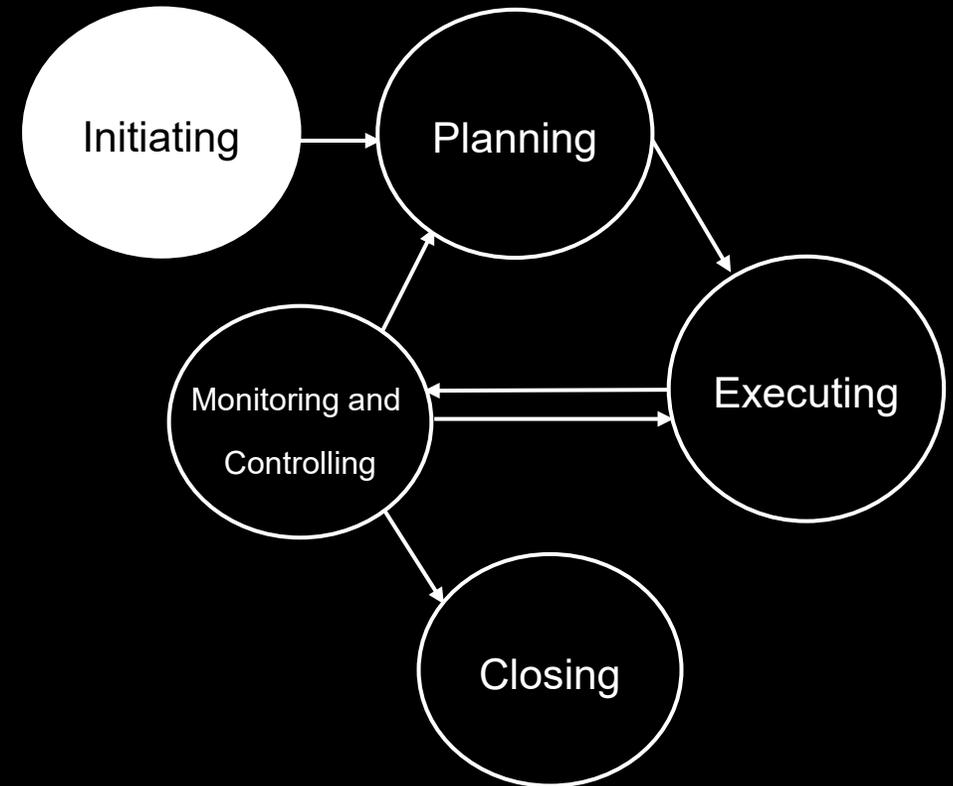


# PMI - PMBOK



# Initiating

- How long do we have?
- How much money do we want to spend?
- Where do we want to go?
- How are we going to get there?
- Are we going to rent a bike?
- How will we deal with money?



# Project Initiation

## Prepare a Project Charter

- A high-level overview of the project
- Budget
- Timeline
- Resources
- Final deliverable
  - Must have product
  - Output, not outcome

BUCHAREST

ARRIVE - WED, AUG 22, 2018      AUG 22-24 - 2 NIGHTS  
DEPART - TUES, SEPT 25, 2018      - SEPT 23-25 - 2 NIGHTS

Fri ~~30~~ AUG 24 - SEPT 22 - ON ROAD 30 DAYS

<u>BUCHAREST — BELGRADE</u>	1,000 MILES / 27 HRS	5 DAYS
<u>BELGRADE — ZAGREB</u>	600 MILES / 15.5 HRS	5
		5 DAYS
<u>ZAGREB — <del>ITALY</del> TRIESTE</u>	250 <del>600</del> MILES / <del>27</del> 6 HRS	10
		10 DAYS
<u>TRIESTE <del>ITALY</del> — BUCHAREST</u>	1,450 <del>1,700</del> MILES / <del>27</del> 37 HRS	10
		10 DAYS
		<u>30</u>

# Project Charter

- Why is the project being done?
- Who are the stakeholders?
- What are the primary project objectives?
- What will be the final product or deliverable?
- The primary purpose: **get management approval to proceed.**

## Project Charter Template

The project charter is a document that authorizes the manager to apply organizational resources to project activities and to proceed with finalizing the project scope and developing the project plan.

**Project Title:** [Enter project title here]

**Project Manager:** [Enter project manager name here]

**Project Sponsor(s):** [Enter project sponsor(s) name(s) here]

**Mandate(s):** [Enter any legal or legislative requirement(s) here]

**Level of Empowerment:** [Modify the following statement or add any specific authority the project charter is giving to the project manager, such as authority to approve and/or recommend expenditures of funds or assign and/or recommend human resources to staff the project]

This project charter has been initiated by [initiating organization] and authorizes the project manager to expend [District | Department | Division] resources to complete a project plan for the [project name].

### Approvals:

Project Sponsor \_\_\_\_\_ Date \_\_\_\_\_  
Other Approving Authority, if needed \_\_\_\_\_ Date \_\_\_\_\_

# Ferry from Northern Ireland to Scotland



Initiating

# Survey – Which Are Project Deliverables?

- New Zoning Ordinance
- Safe Streets
- Parking Standards Document
- Better Playground Lighting
- Increased Affordable Housing
- Fun, Safe, Time Sensitive and Affordable Trip



# Planning – The Trip 3-Ring Binder

## Bosnia and Herzegovina

Bosnia and Herzegovina lies at the cultural crossroads of east and west. It was here where the Byzantine and Ottoman civilizations met the Roman and Austro-Hungarian ones, creating one of the richest and most diverse cultural heritage regions of southern Europe. It is also the only place in the world where you can find Orthodox and Catholic churches, a mosque and a synagogue side by side in the same square. Despite the image of Bosnia and Herzegovina's past, it is actually one of the safest places in Europe.

### Roads and Riding

Much of the country is covered by mountainous terrain, which together with good roads makes a great riding destination. This tiny country is tailor made for adventure and has a taste of the wild that is long gone in Western Europe.

### Climate and Environment, When to Go

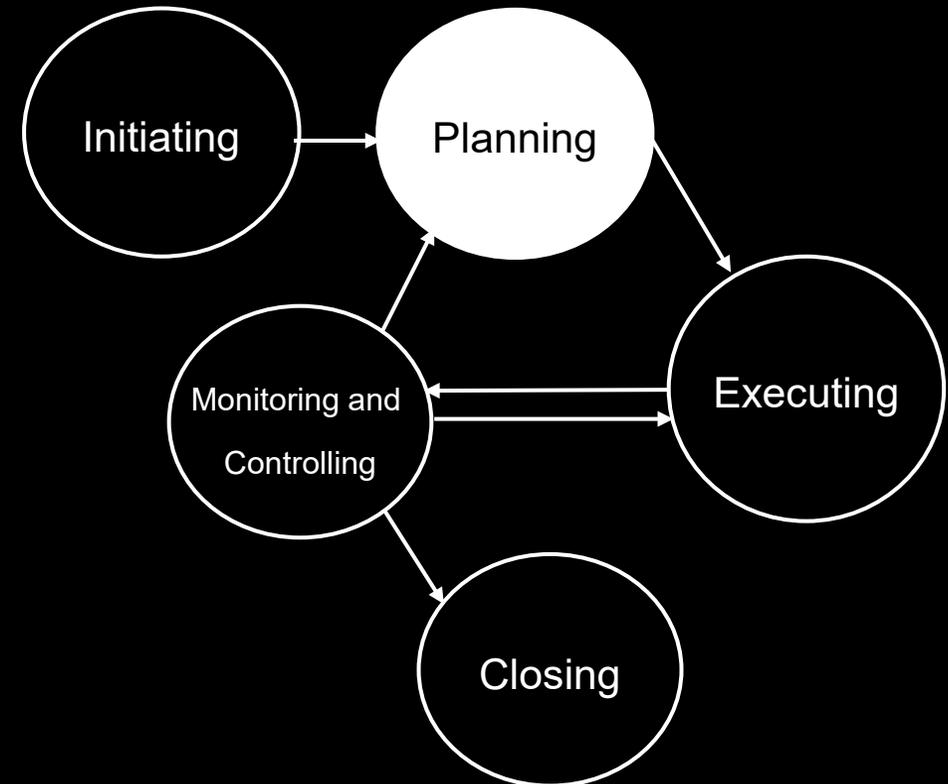
Bosnia has a mild and consistent central European climate. The best time to visit is from May to September. Bosnia is not a heavily touristed country, so does not get super crowded in the summer. Any time is a good time to visit Bosnia.

### Sights, People, Food and Drink

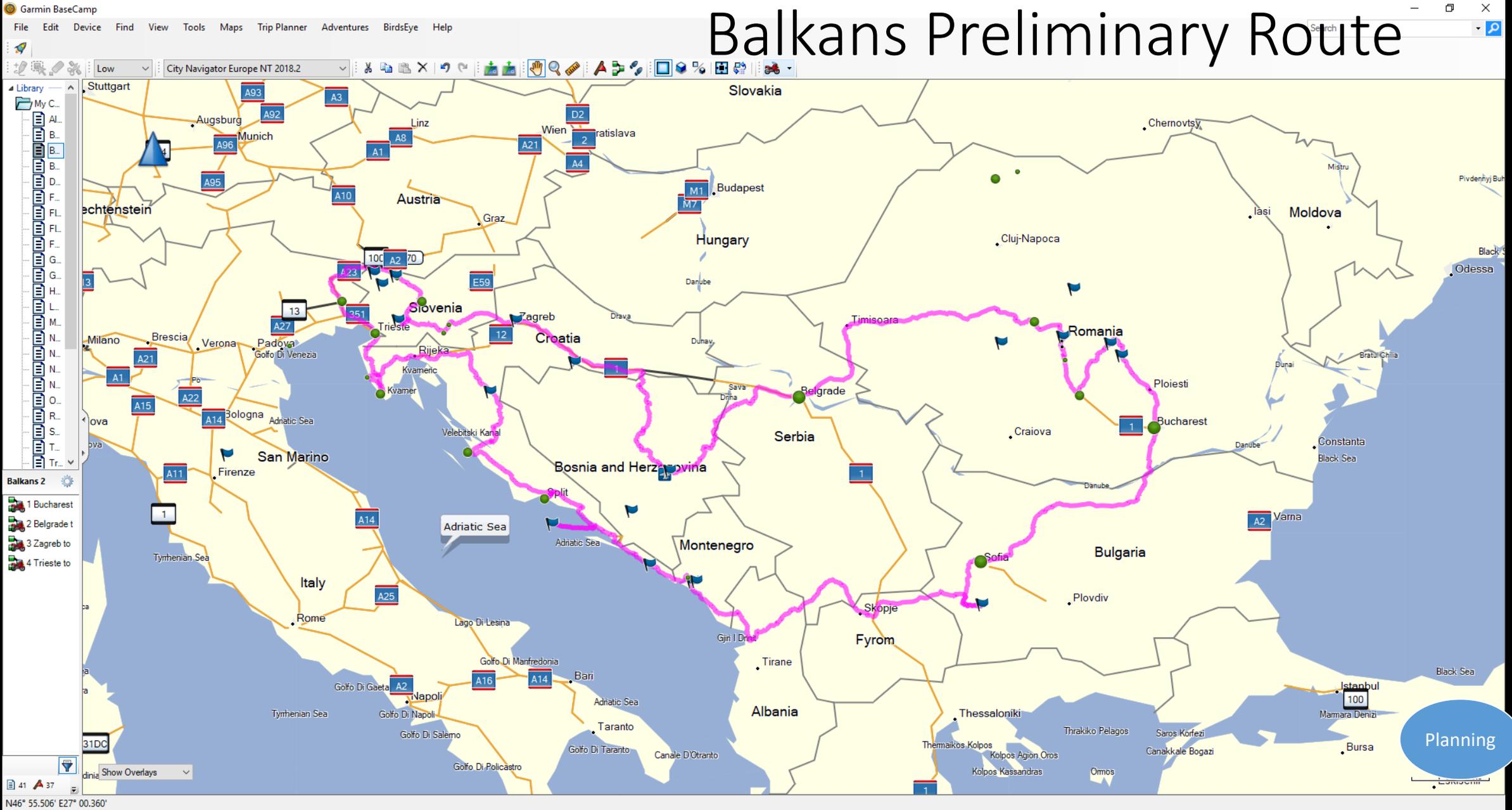
As the crossroads of Austro-Hungarian and Ottoman civilizations, Sarajevo and Mostar are beautifully preserved medieval cities, the former with an excellent Turkish bazaar, the latter with a stone arch bridge as the centerpiece of a medieval old town. Though they tend to live in separate areas of the country, Serbs, Croats and Bosniaks (Muslims) are all of the same ethnic stock and physically indistinguishable. The people, especially in Sarajevo and Mostar, are working very hard to renew and show off the treasures their cities are and are most welcoming and appreciative of visitors. Bosnia's Turkish heritage means that grilled meats are popular, try cevapci (minced lamb or beef) or burek, a meat or cheese baked into a flakey pastry.

### Facts For The Traveler

<b>Capital city:</b>	Sarajevo
<b>Population:</b>	4 million
<b>Land area:</b>	51.129 sq km
<b>Official language:</b>	Croatian, Serbian (both very similar)
<b>National currency:</b>	Convertible Mark (KM), EUR is widely excepted
<b>Religion:</b>	Muslim (44%), Orthodox Christian (32%), Roman Catholic (17%)
<b>Time zone:</b>	Central European Time (GMT+1)
<b>International dialing number:</b>	+387
<b>Visa:</b>	Tourists from most countries (EU, USA, etc) do not need visa. A valid passport is required only.
<b>Electricity:</b>	220V, 50Hz
<b>Electric Plug Details:</b>	



# Balkans Preliminary Route



# Project Budget

Ireland/Scotland Trip Expenses			
September 15 - October 12, 2019			
Date	Expense	Amount (\$)	
<b>Travel</b>			
	Parking	\$ 237.60	
	Airfare	\$ 1,260.12	
9/19/2019	Ferry Belfast-Cairnryan	\$ 117.62	
	Motorcycle Rental	\$ 2,889.04	
	Car Rental	\$ 1,217.78	
9/18/2019	Gas, BP Barker's, Bainbridge	\$ 16.05	
9/19/2019	Gas, BP, Biggar	\$ 20.06	
9/15/2019	Am Airlines, luggage, seat upgrade	\$ 269.56	
9/19/2019	Ticketing	\$ 39.57	
9/25/2019	Gas, Lochcarron	\$ 14.89	
9/28/2019	Gas, Stranraer	\$ 10.52	
9/28/2019	Stena Line	\$ 121.01	
10/12/2019	American Airlines, luggage	\$ 182.55	
	<b>Total</b>		<b>\$ 6,396.37</b>
	<b>Bandit</b>		<b>\$ 560.00</b>
	<b>Cash</b>		<b>\$ 678.53</b>

Planning

# Electronic Helpers

- Sprint International Service
- Local Wifi
- SPOT Gen 3 Tracker
- SpotWalla.com
- ABS, traction control, ride modes, EFI, TPMS, GPS,
- Google Blogger - <https://terryandsooz.blogspot.com/>



Planning

# Overkill?



Planning

# Electronic Helpers

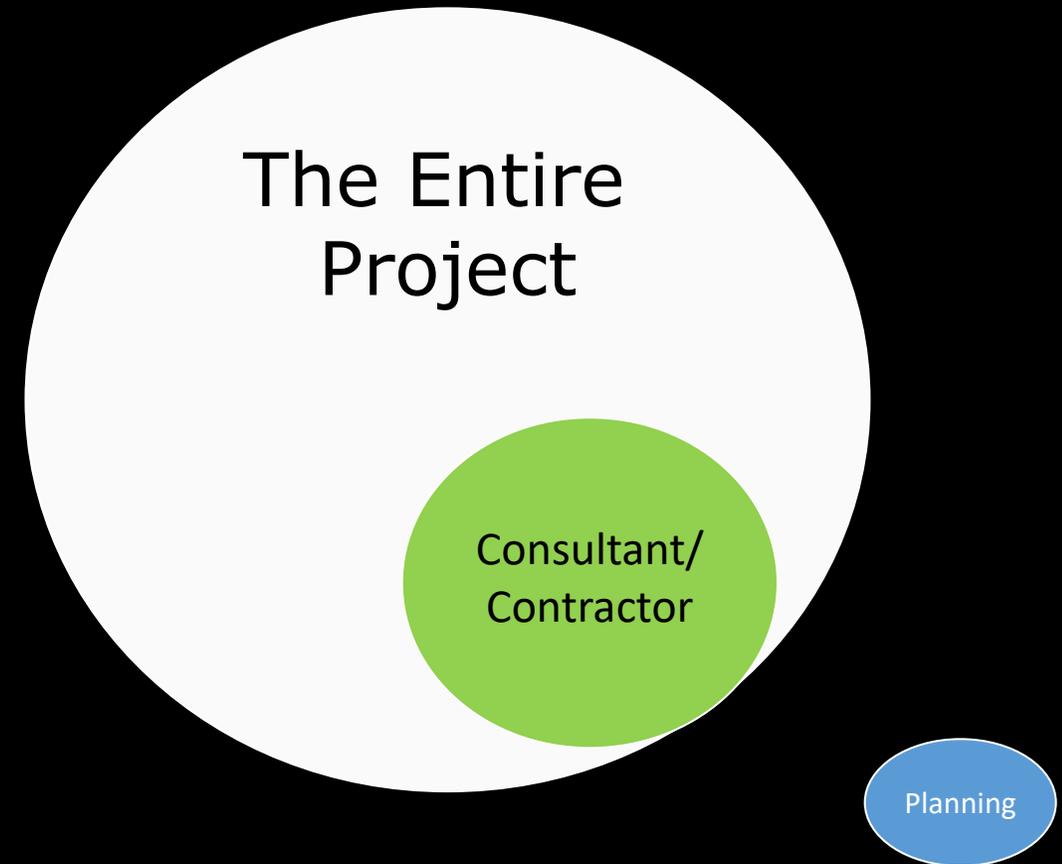
*Don't Use a Sledgehammer To Kill a Gnat*

- PM software is a tool
- Managing the project is much more than managing the software
- Use the tool that fits your needs
- Remember they are just tools, not the project



# Contract Management (motorcycle rental) Within A Project

- When to use contractors?
- Include the Contract Management process in the Charter, WBS, schedule and budget
- What are the contract deliverables?
- Reviewing and paying invoices



# Work Breakdown Structure (WBS)

- WBS - a detailed project description.
- Always keep the deliverable in mind.
- Use the *verb + object* format.  
Example: *write + parking standards*
- Start general and become more specific.
- Keep statements short and to the point.
- Apply a consistent and simple numbering system.



Planning

# WBS “Fear Gear”

- Packing evolution
- Each adventure (project) has unique requirements
- Experience



Planning

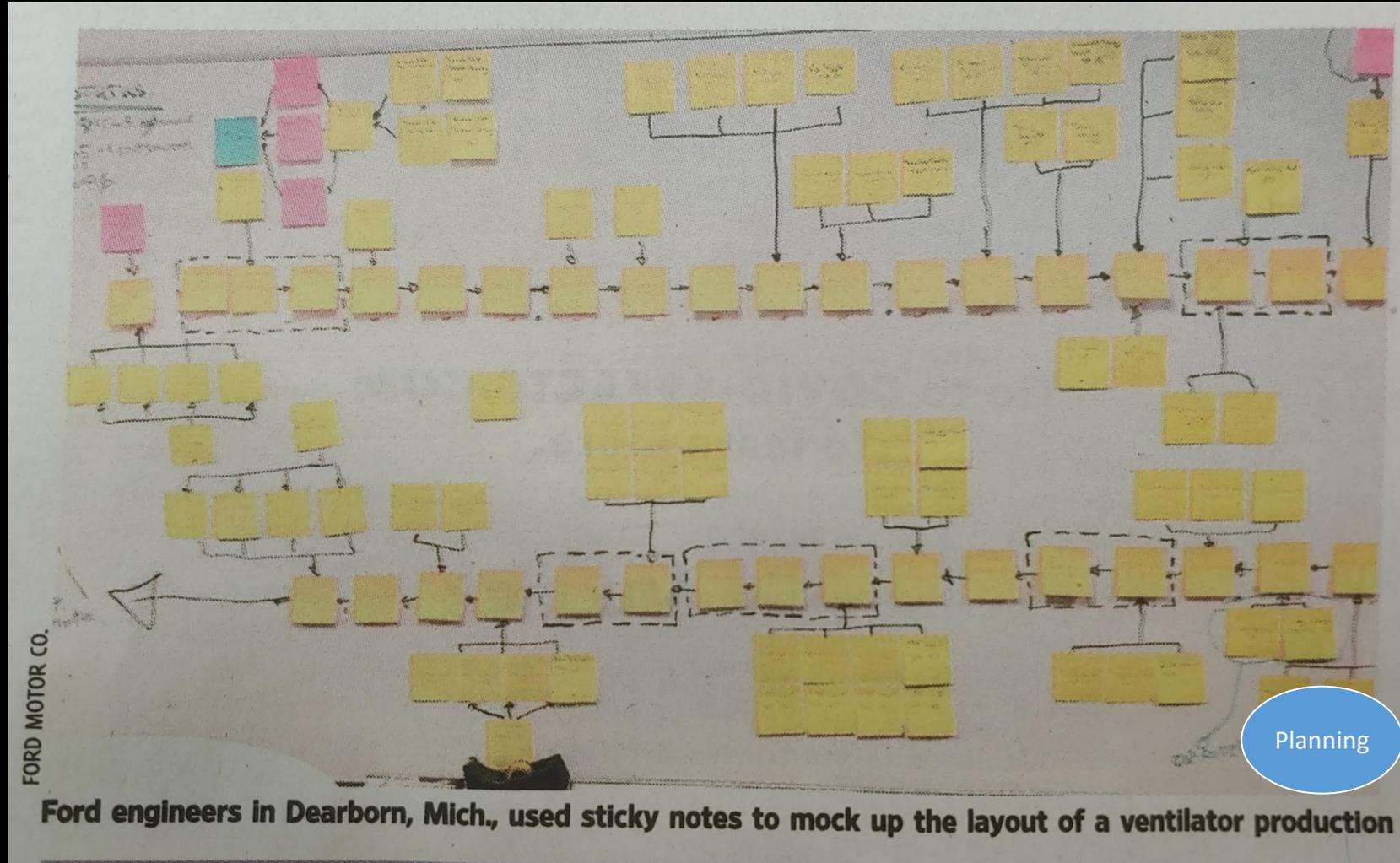
# Scheduling Public Involvement (Local Input)

- Public involvement must be planned and scheduled
  - Advertisements/Notifications
  - Meeting date(s) – milestones
  - Document revisions
  - Meeting notes and follow-up
  - Staff participation
- Plan time for gathering local input



Planning

# Building a WBS



Ford engineers in Dearborn, Mich., used sticky notes to mock up the layout of a ventilator production

Alps Trip June 12, 2016 - July 4, 2016

Route #	Date	Location		Hours/Miles	Overnight		Notes
		Depart	Arrive		Hotel	Rate	
	6/13/2016	Gainesville	Frankfurt/Heidelberg	Arrive 12:50pm	Stefan's B&B, Hardtstraße 78, 69124 Heidelberg, Germany - <b>RESERVED</b>	\$ 70.00	Get bike, phone card, cash; STORE BAGS AT AIRPORT
1	6/14/2016	Frankfurt/Heidelberg	Lech, Aus	4 hrs/137 miles	Pension Daniel, Omesberg 397, 6764 Lech, Austria - <b>RESERVED</b>	\$ 100.00	
2	6/15-16/2016	Lech	Andermatt, Sw	5 hrs/141 miles	Gasthaus zum Sternen Gotthardstrasse 67, Andermatt, 6490, Switzerland - <b>RESERVED</b>	\$ 300.00	Nufenen Pass and Café; Oberalp Pass; Gotthard Pass; Furka Pass; Grimsel Pass; Susten Pass; Triesen, Lichtenstein; 2 nights
3	6/17-18/2016	Andermatt	Interlaken, Sw	4.5 hrs/120 miles	Chalet Ermitage - Panorama B&B - <b>RESERVED</b> - Wartbodenstrasse 23, 3626 Hünibach, Thun, Bern, Switzerland	\$ 231.00	Lauterbrunnen waterfalls and cable car; 2 nights
4	6/19/2016	Interlaken	Martigny, Sw	3 hrs/92 miles	Route du Cergneux, Martigny-Combe, Wallis 1921, Switzerland <b>RESERVED MSMJFZ AirBNB</b>	\$ 83.00	Villars; Mont Blanc;
5	6/20/2016	Martigny, Sw	Como, It	5 hrs/164 miles	Vista Lago Via Roma 25, Brunate, 22034, Italy <b>RESERVED</b>	\$ 95.00	Briancon, Fr; MV Augusto factory
6	6/21/2016	Como, It	Mals, It	4.5 hrs/135 miles	Hotel Post, Via Flora, 15, 39020 Gorenza BZ, Italy - <b>RESERVED</b>	\$ 65.00	Stelvio Pass; Mustair Museum and Church;
7	6/22-23/2016	Mals, It	Arabba, It	3.5 hrs/100 miles	Hotel Evaldo, via mesdi, 3, 32020 Arabba, Livinallongo BL, Italy - <b>RESERVED</b>	\$ 300.00	Dolomites; Piz Boe Mountain; Routes 7a, 7a1, 7a2; 2 nights
8	6/24/2016	Arabba, It	Villach, Aus	6 hrs/212 miles	Hotel Mosser, Bahnhofstraße. 9, A-9500 Villach - Kärnten, Austria - <b>RESERVED</b>	\$ 160.00	Wurzen Pass; 8a, 8b, Slovenia, Ljubjana, Trieste;
9	6/25/2016	Villach, Aus	Grossglockner, Aus	2.5 hrs/92 miles	Heiligenblut Hotel GmbH, Winkl 46, A-9844 Heiligenblut - <b>RESERVED</b>	\$ 180.00	Restaurant Hexenkuchl;
10	6/26/2016	Grossglockner, Aus	Heidelberg	4 hrs/138 miles	Stefan's B&B - <b>RESERVED</b>	\$ 70.00	
	6/27/2016	Shuttle from Heidelberg to Frankfurt	Vienna		AirBNB Josefstädter Straße 59 16 / 5.Stock Vienna, Vienna 1080 Austria - <b>RESERVED</b>		6/27/16 - Fly Austrian Air #OS130 12:50pm-2:20pm from Frankfurt to Vienna. SWAP BAGS
	6/28/2016		Vienna		AirBNB Josefstädter Straße 59 16 / 5.Stock Vienna, Vienna 1080 Austria - <b>RESERVED</b>		
	6/29/2016		Vienna		AirBNB Josefstädter Straße 59 16 / 5.Stock Vienna, Vienna 1080 Austria - <b>RESERVED</b>	\$ 250.00	
	6/30/2016	Fly from Vienna to Prague	Prague, Czek Rep	Confirmation Code: ZAKMB3	AirBNB Jaromírova, Prague, Hlavní město Praha,Czech Republic - <b>RESERVED</b>		6/30/16 - Fly from Vienna to Prague Austrian Air #OS707 12:56pm-1:50pm
	7/1/2016		Prague, Czek Rep	Thu, April 07, 2016	AirBNB Jaromírova, Prague, Hlavní město Praha,Czech Republic - <b>RESERVED</b>		
	7/2/2016		Prague, Czek Rep	Receipt # 2167782326	AirBNB Jaromírova, Prague, Hlavní město Praha,Czech Republic - <b>RESERVED.</b>	\$ 209.00	
	7/3-4/2016	Train from Prague to Frankfurt Airport and Frankfurt to Iceland	Orlando	Depart 10:30pm	Home		7/3/16 - Train from Prague to Frankfurt airport; 7/3/16 - Depart Frankfurt 22:30
					<b>Total Lodging Expenses</b>	<b>\$ 2,113.00</b>	
	Motorcycle - BMW R1200GS June 14-June 26 = \$1,805 + \$160 insurance - \$300 deposit						
	3 nights at Stefan's @ 70/night						

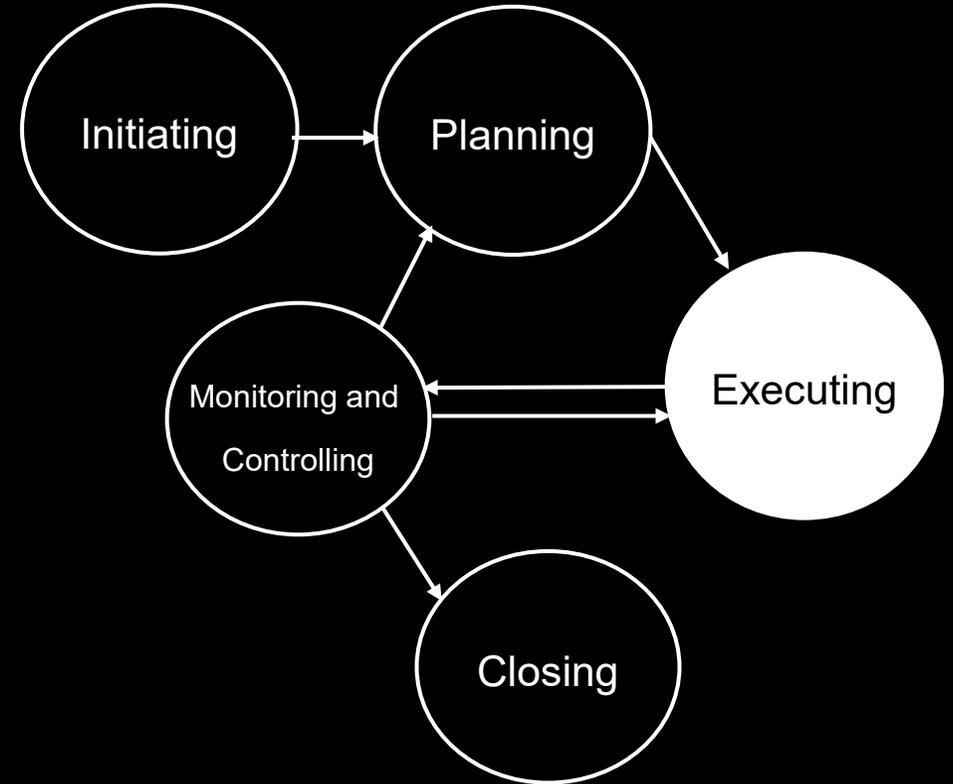




SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
<p>12-Jun</p> <p><b>Dpt. Orlando 11:00a</b> FI# FI7814: MCO To: BOS</p> <p>4:21 p Iceland Air</p>	<p>13</p> <p><b>Arv Frankfurt 12:50</b> Shuttle to Stefens BNB</p> <p>69124 Heidelberg</p> <p><i>Stefens BNB</i> <b>Heidelberg, Germany</b></p>	<p>14</p> <p><b>Heidelberg to Lech, Aus</b> 4 hrs/137 miles</p> <p><i>Pension Daniel</i></p> <p>3976764 <b>Lech, Austria</b></p>	<p>15</p> <p><b>Lech to Andermatt, Sw</b> 5 hrs, 141 miles</p> <p><i>Gasthaus zum Sternen</i></p> <p>Andermatt 6490 <b>Andermatt, Switz</b></p>	<p>16</p> <p><b>Nufenen Pass/Café</b> Oberalp Pass Gotthard/Furka Pass Grimsel/Susten Pass Triesen, Lichtenstein <i>Gasthaus zum Sternen</i> <b>Andermatt, Switz</b></p>	<p>17</p> <p><b>Andermatt/Interlaken</b> 4.5 hrs/120 miles</p> <p><i>Chalet Ermitage</i> Panorama BNB Thun, Bern, Sw <b>Interlaken, Switz</b></p>	<p>18</p> <p><b>Lauterbrunnen</b> Waterfalls Cable car</p> <p><i>Chalet Ermitage</i> <b>Interlaken, Switz</b></p>
<p>19</p> <p><b>Interlaken/Martigny Sw</b> 3 hrs, 92 miles</p> <p><i>Route du Cergneux</i></p> <p>Wallis 1921 <b>Martigny, Switz</b></p>	<p>20</p> <p><b>Martigny to Como, Italy</b> 5 hrs/164 miles</p> <p><i>Vista Lago</i></p> <p><b>Brunate Italy</b></p>	<p>21</p> <p><b>Como to Mals, Italy</b> 4.5 hrs/135 miles</p> <p><i>Hotel Post</i> Via Vlor, 15</p> <p><b>Mals, Italy</b></p>	<p>22</p> <p><b>Mals, Italy</b></p> <p>Dolomites, Piz Boe Mountain</p> <p><b>Mals, Italy</b></p>	<p>23</p> <p><b>Mals to Arabba, Italy</b> 3.5 hrs/100 miles <i>Hotel Evaldo</i></p> <p><b>Arabba, Italy</b></p>	<p>24</p> <p><b>Arabba, It to Villach, Aus</b> 3.5 hrs/139 miles <i>Hotel Mosser</i></p> <p><b>Villach, Austria</b></p>	<p>25</p> <p><b>Villach / Grossglokner</b> 2.5 hrs/92 miles <i>Heiligenblut Hotel</i></p> <p>Ljubljana, Slovenia Trieste, Italy <b>Grossglokner, Aus</b></p>
<p>26</p> <p><b>Grossglokner, Aus to Heidelberg, Germany</b> 4 hrs/138miles</p> <p><i>Stefens BNB</i> <b>Heidelberg</b></p>	<p>27</p> <p><b>Shuttle to Frankfurt</b> Austrian Air 2:50p #OS130</p> <p><b>Vienna, Austria</b></p>	<p>28</p> <p><b>Vienna, Austria</b></p>	<p>29</p> <p><b>Vienna, Austria</b></p>	<p>30</p> <p><b>Vienna to Prague</b> Austrian Air 12:56 pm #OS707</p> <p><b>Prague, Czek Rep</b></p>	<p>1-Jul</p> <p><b>Prague, Czek Rep</b></p>	<p>2</p> <p><b>Prague, Czek Rep</b></p>
<p>3</p> <p>FL FI525 at 2230 FRA To: KEF</p> <p>Keflavik, Iceland</p>	<p>4</p> <p>FI635 at 0725 KEF to BOS FI7813 at 1400 <b>BOS to Orlando</b></p>	<p>5</p>	<p>6</p>	<p>7</p>	<p>8</p>	<p>Planning</p>



# Executing



# Known Risks

- Insurance – travel and emergency evacuation
- Border crossings – Patagonia vs. Balkans
- Language – apps, attitude, openness
- Safety – ATGATT
- Weather



Executing

# Unknown Risks – When Things Go Wrong in An Alps Tunnel

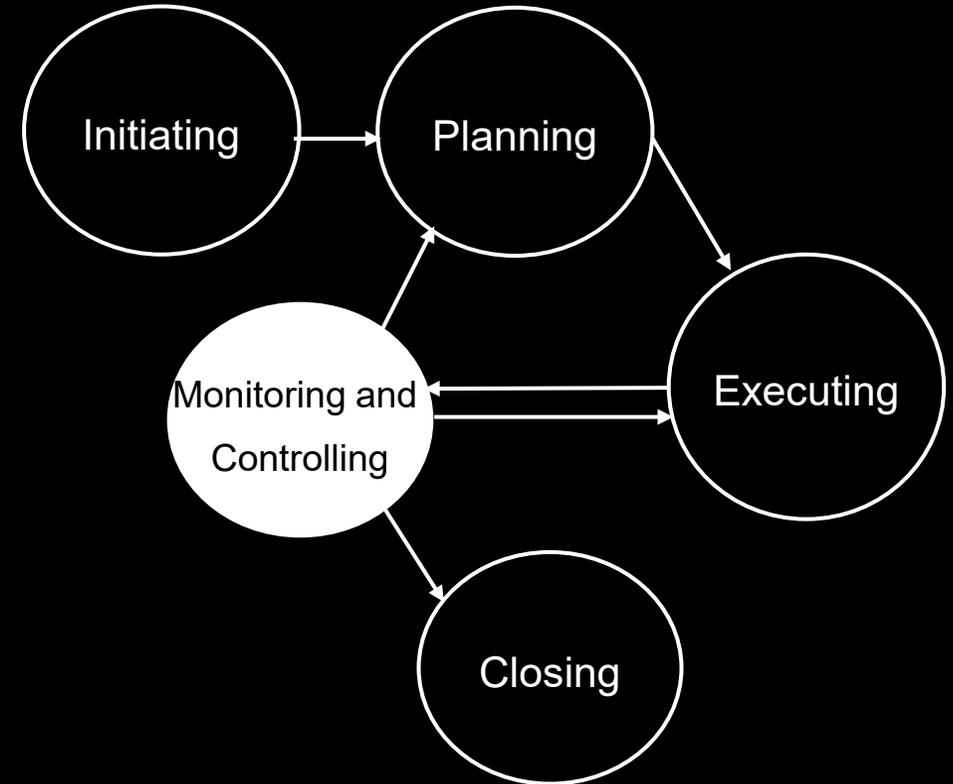
- Trust the process
- Momentum
- Fear
- Always look forward – you go where you look
- Stay between the lines
- Don't overreact

# Manageable Risks - Ride Your Ride





# Monitoring & Controlling



# Project Monitoring and Controlling – Make Adjustments

- Constant communication
- Visual real time checks
- Bluetooth intercom
- Sooz navigating and safety checks – Zagreb streetcars
- Color blindness
- Fatigue and dehydration



# Minimize Distractions

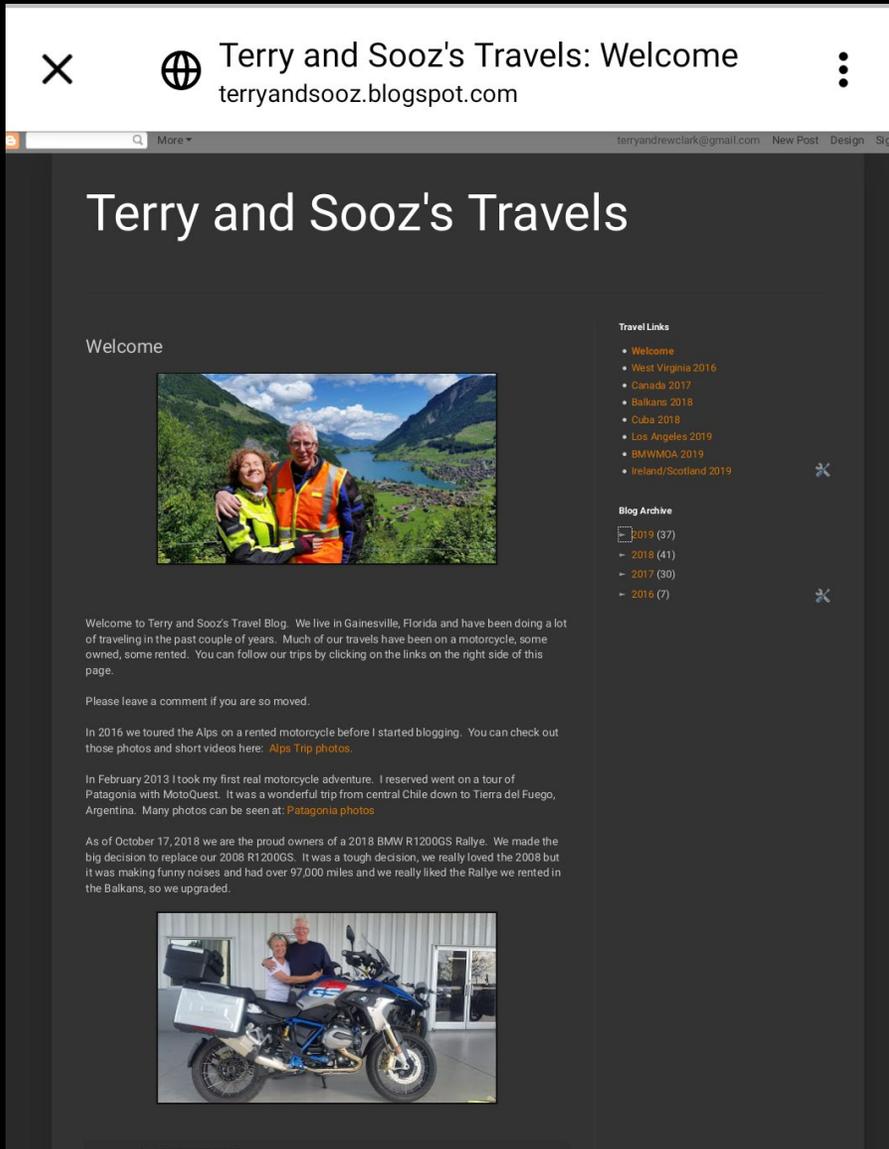


# Project Detours – Project Change

- Balkans road construction
- Unexpected challenges
- Do you stop and re-plan or do you continue on?
- Is the variance from the plan big enough to make a change?



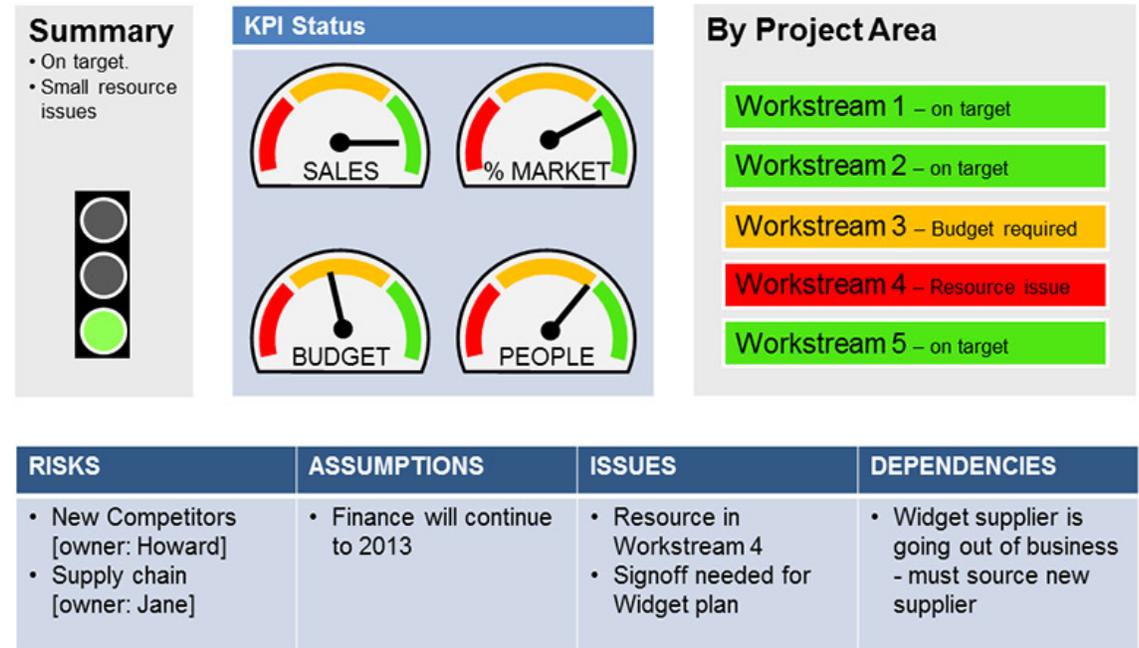
Monitoring & Controlling



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# Project Reporting

## Project Dashboard



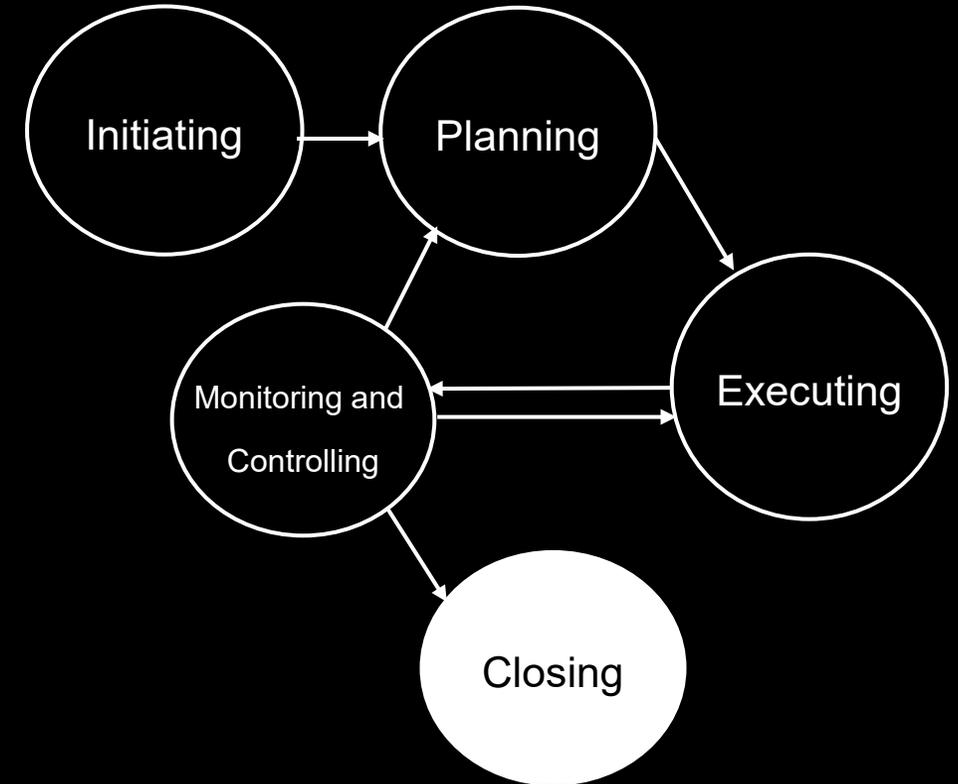
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# Closing



# Project Closing - The Deliverable “Walk Through”

- Items to defer
- Did we accomplish what we set out (the deliverable)?
- Packaging
- Public celebration
- Perfection is not an option
- Lessons learned



# Summary

- Prepare – conduct research, continuous learning
- Review your values/goals
- Project Management Processes:
  - Initiating
  - Planning
  - Executing
  - Monitoring & Controlling
  - Closing
- Enjoy the ride!



# Questions/ Follow-up

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