



Training Package: Transversal Skills

Module IV: Time Management



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Sessions Program:

Session 1: 10:00 – 11:15 AM

Break: 11:15 – 11:30 AM

Session 2: 11:30 – 12:45 PM

Lunch: 12:45 – 13:15 PM

Session 3: 13:15 – 14:30 PM

Break: 14:30 – 14:45 PM

Session 4: 14:45 – 16:00 PM



TOPIC 1: PRINCIPLES OF PROJECT MANAGEMENT



Session 1: Introduction

1- What is a Project?

- A project is a unique endeavor undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes or benefits.

The 3 Building Blocks

- Time: Scheduling is a collection of techniques used to develop and present schedules that show when work will be performed.
- Cost: How are necessary funds acquired and finances managed?
- Quality: How will fitness for purpose of the deliverables and management processes be assured?

2- What is Project Management?

- Project Management is the application of processes, methods, skills, knowledge and experience to achieve specific project objectives.
- It has final deliverables that are constrained to a finite timescale and budget.
- It involves the planning and organization of a company's resources to move a specific task, event, or duty towards completion.

3- Project Management Process

- The process includes the following stages:
Planning, Initiation, Execution, Monitoring, Closing
- From start to finish, every project needs a plan that outlines how things will get off the ground, how they will be built, and how they will finish.
- It usually has a budget and a time frame.

4- Why Do We Use Project Management?

- Project Management is aimed at producing an end product that will effect some change for the benefit of the organization that instigated the project.

5- When Do We Use Project Management?

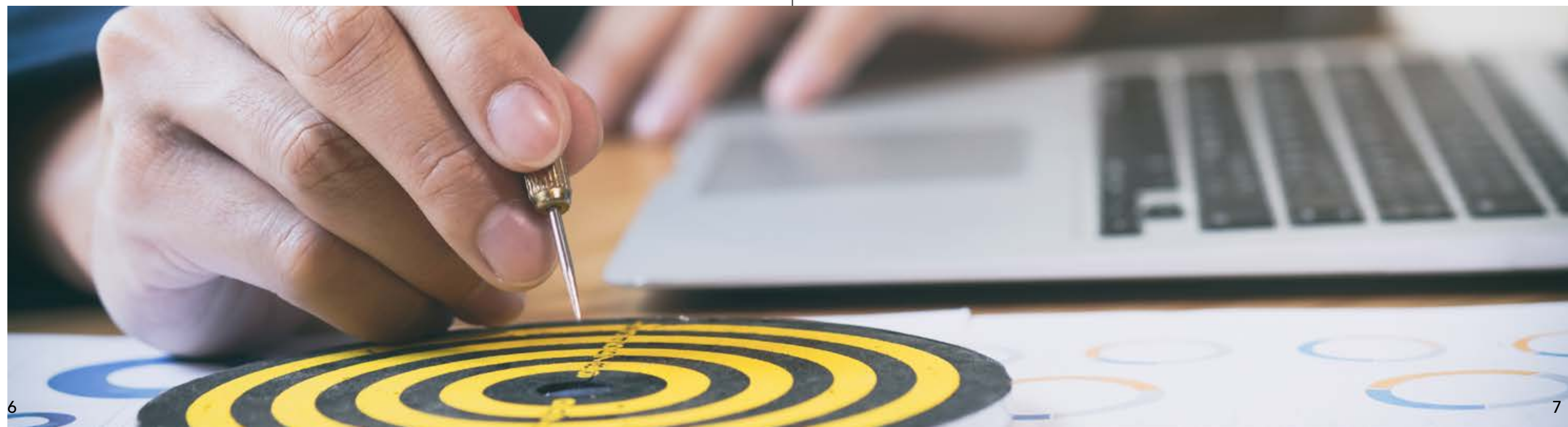
- Projects are separate from business-as-usual activities and occur when an organization wants to deliver a solution to set requirements within an agreed budget and timeframe.
- Projects require a team of people to come together temporarily to focus on specific project objectives.

6- Who Uses Project Management?

- Anyone and everyone who manages projects, even if they aren't formally called a 'project manager'.

7- The Core Components of Project Management

- Defining the reason why a project is necessary;
- Capturing project requirements, specifying quality of the deliverables, estimating resources and timescales;
- Preparing a business case to justify the investment;
- Securing corporate agreement and funding;
- Leading and motivating the project delivery team;
- Developing and implementing a management plan for the project;
- Managing the risks, issues and changes on the project;
- Monitoring progress against plan;
- Managing the project budget;
- Maintaining communications with stakeholders and the project organization;
- Provider management;
- Closing the project in a controlled fashion when appropriate.



8- The 7 Themes

- Themes provide insight into how the project should be managed.
 - They can be thought of as knowledge areas, or how principles are put in practice.
 - They are set up at the beginning of the project and then monitored throughout.
- a) **Business Case**
 - Related to the continued business justification principle.
 - This theme provides knowledge about whether a project is worthwhile and achievable.
 - b) **Organization**
 - The organisation theme requires project managers to have everyone's roles and responsibilities on record.
 - c) **Quality**
 - It is related to the focus on products principle.
 - It can be an abstract concept.
 - Defining it at the beginning of a project is vital to keeping the work on track.
 - d) **Plan**
 - It describes how targets will be achieved.
 - It focuses on the products, timescale, cost, quality and benefits.
 - e) **Risk**
 - The purpose of this theme is to identify, assess and control uncertain events during a project.
 - These are recorded in a risk log.
 - Negative risks are called threats and positive ones are called opportunities.
 - f) **Change**
 - This theme is about handling change requests and issues that arise during the project.
 - The idea is not to prevent changes, but to get them agreed on before they're executed.
 - g) **Progress**
 - It is about tracking the project.
 - This allows project managers to check and control where they are relative to the plan.
 - Not only can projects go off the rails without this – or any one – of the themes, but by not tracking, you may not even be aware that it's happening.



Topic 1

Principles of Project Management

Session 1: Introduction to Project Management

1- What is a Project?

A project is a unique, transient endeavour, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes or benefits. A project is usually deemed to be a success if it achieves the objectives according to their acceptance criteria, within an agreed timescale and budget. Time, cost and quality are the building blocks of every project.

Time: scheduling is a collection of techniques used to develop and present schedules that show when work will be performed.

Cost: how are necessary funds acquired and finances managed?

Quality: how will fitness for purpose of the deliverables and management processes be assured?

2- What is Project Management?

A project is a unique, transient endeavour, undertaken to achieve planned objectives, which could be defined in terms of outputs, outcomes or benefits. A project is usually deemed to be a success if it achieves the objectives according to their acceptance criteria, within an agreed timescale and budget. Time, cost and quality are the building blocks of every project.

Time: scheduling is a collection of techniques used to develop and present schedules that show when work will be performed.

Cost: how are necessary funds acquired and finances managed?

Quality: how will fitness for purpose of the deliverables and management processes be assured?

3- Project Management Process

Generally speaking, the project management process includes the following stages: planning, initiation, execution, monitoring, and closing.

From start to finish, every project needs a plan that outlines how things will get off the ground, how they will be built, and how they will finish. For example, in architecture, the plan starts with an idea, progresses to drawings, and moves on to blueprint drafting, with thousands of little pieces coming together between each step. The architect is just one person providing one piece of the puzzle. The project manager puts it all together.

Every project usually has a budget and a time frame. Project management keeps everything moving smoothly, on time, and on budget. That means when the planned time frame is coming to an end, the project manager may keep all the team members working on the project to finish on schedule.

4- Why Do We Use Project Management?

Project management is aimed at producing an end product that will effect some change for the benefit of the organization that instigated the project. It is the initiation, planning and control of a range of tasks required to deliver this end product. Projects that require formal management are those that:

- Produce something new or altered, tangible or intangible;
- Have a finite timespan: a definite start and end;
- Are likely to be complex in terms of work or groups involved;
- Require the management of change;
- Require the management of risks.

Investment in effective project management will have a number of benefits, such as:

- Providing a greater likelihood of achieving the desired result;
- Ensuring efficient and best value use of resources;
- Satisfying the differing needs of the project's stakeholders.

5- When Do We Use Project Management?

Projects are separate from business-as-usual activities and occur when an organization wants to deliver a solution to set requirements within an agreed budget and timeframe. Projects require a team of people to come together temporarily to focus on specific project objectives. As a result, effective teamwork is central to successful projects.

Projects require a team of people to come together temporarily to focus on specific project objectives. As a result, effective teamwork is central to successful projects. Project management is concerned with managing discrete packages of work to achieve specific objectives. The way the work is managed depends upon a wide variety of factors.

The scale, significance and complexity of the work are obvious factors: relocating a small office and organizing the Olympics share many basic principles, but offer very different managerial challenges. Objectives may be expressed in terms of:

- Outputs (such as a new HQ building);
- Outcomes (such as staff being relocated from multiple locations to the new HQ);
- Benefits (such as reduced travel and facilities management costs);
- Strategic objectives (such as doubling the organisation's share price in three years).

6- Who Uses Project Management?

Anyone and everyone manages projects, even if they aren't formally called a 'project manager'. Ever organized an event? That's a project you managed with a team of people, and project management is a life skill for all. More formally, projects crop up in all industries and business:

- Transport and Infrastructure
- IT
- Product manufacture
- Building and Construction
- Finance and Law

7- The Core Components of Project Management

- Defining the reason why a project is necessary;
- Capturing project requirements, specifying quality of the deliverables, estimating resources and timescales;
- Preparing a business case to justify the investment;
- Securing corporate agreement and funding;
- Leading and motivating the project delivery team;
- Developing and implementing a management plan for the project;
- Managing the risks, issues and changes on the project;
- Monitoring progress against plan;
- Managing the project budget;
- Maintaining communications with stakeholders and the project organisation;
- Provider management;
- Closing the project in a controlled fashion when appropriate.

8- The 7 Themes

Themes provide insight into how the project should be managed. They can be thought of as knowledge areas, or how principles are put in practice. They are set up at the beginning of the project and then monitored throughout. Projects are kept on track by constantly addressing these themes:

a. Business Case

Related to the continued business justification principle. This theme provides knowledge about whether a project is worthwhile and achievable.

b. Organisation

Related to the define roles and responsibilities principle. The organisation theme requires project managers to have everyone's roles and responsibilities on record.

c. Quality

Related to the focus on products principle. Quality can be an abstract concept, so defining it at the beginning of a project is vital to keeping the work on track.

d. Plans

A plan describes how targets will be achieved. It focuses on the products, timescale, cost, quality and benefits.

e. Risk

The purpose of this theme is to identify, assess and control uncertain events during a project. These are recorded in a risk log. Negative risks are called threats and positive ones are called opportunities.

f. Change

This theme is about handling change requests and issues that arise during the project. The idea is not to prevent changes, but to get them agreed on before they're executed.

g. Progress

Progress is about tracking the project. This allows project managers to check and control where they are relative to the plan. Not only can projects go off the rails without this – or any one – of the themes, but by not tracking, you may not even be aware that it's happening.

Session 2: Rules & Life Cycle

I- The 5 Rules

- Address important questions at the beginning of the project
- Sketch out a scope and goals for your project
- Communicate roles, expectations, and objectives to the team
- Monitor progress and identify roadblocks
- Make sure all deliverables have been met and finalize the project

1. Address important questions

- Start your project off the right way by taking time to address important questions at the beginning.
- Whether your team is building out content for a new client or conceptualizing updated software, initiating conversations about the project's value and mission from the beginning is one of the most important project management principles.

Ask these questions first:

- Should this project happen?
- How will it help the company?
- Can the company benefit from this project at this time?
- What problem is this project solving?

2. Sketch out a scope and goals

- What is this project's main goal?
- What deliverables are needed to reach that goal?
- Who is the best person to own each deliverable?
- What risks exist for this project, and how can you avoid them?
- What is the scope of this project?

3. Communicate roles, expectations, and objectives

- Start by relaying a few of these points
 - The progress you've made along the project timeline
 - The goals and advantages of the project
 - The project's roadblocks and successes
- Go over the project and ask:
 - Have all deliverables been met?
 - Were all deliverables carried out to a standard of quality the team is proud of?
 - What did your team do well?
 - How could a project like this function better next time?

4. Monitor progress and identify roadblocks

- During this phase, ask yourself these questions:
 - Do all team members understand what's expected of them?
 - What roadblocks exist? How can you remove them for your team?
 - Is the project on time?

- Are you communicating and staying organized?
- Does the project need to be redirected from its original scope.

5. Make sure all deliverables have been met

- Consider these questions:
 - Have all deliverables been met?
 - Were all deliverables carried out to a standard of quality the team is proud of?
 - What did your team do well?
 - How could a project like this function better next time?

II- Life Cycle

The life cycle can bring more cohesion to the project and ensure that all the team members, especially if there are multiple departments involved.

1- What is the project life cycle?

The project life cycle includes the 5 steps required for project managers to successfully manage a project from start to finish.

2- What are the Five Stages?

a- Initiating phase

- Business case
- Project scope
- Deliverables
- Objectives
- Resources needed
- Milestone plan and timeline
- Cost estimate
- Risks and issues
- Dependencies

b- Planning phase

- What exactly are we going to do?
- How are we going to do it?
- When are we going to do it?
- How will we know when we're done?

This plan should include:

- Project management plan
- Project scope
- Work breakdown structure
- Resource plan
- Budget estimation

c- Executing phase

- Team development
- Stakeholder engagement
- Quality assurance
- Communications
- Client management

d- Monitoring and controlling phase

- Overall progress
- Individual aspects

e- Closing phase

This process might include:

- Delivering the project
- Hosting a post-mortem meeting
- Archiving project records
- Celebrating or acknowledging the achievement
- Officially disbanding or releasing the team



Topic 1

Principles of Project Management

Session 2: Rules & Life Cycle

Despite differing opinions and work styles, project managers across industries are united by the principles behind what they do. Though the finer points may diverge, the basic principles of project management remain the same. Whether you're at a new job or facing unique challenges in a familiar role, read on to be reminded of the five key principles of project management and how you can use them as a backbone to making each day—and each project—more successful.

I- The 5 Project Management Rules

1. Address important questions at the beginning of the project

Start your project off the right way by taking time to address important questions at the beginning. Whether your team is building out content for a new client or conceptualizing updated software, initiating conversations about the project's value and mission from the beginning is one of the most important project management principles.

Ask a few of these questions first:

- Should this project happen?
- How will it help the company?
- Can the company benefit from this project at this time?
- What problem is this project solving?

Your job as a project manager involves selling your own company on your idea. If you aren't sure of the value it brings, they'll be even less convinced. According to a Gallup Business Journal poll, just 2.5% of companies complete 100% of their projects each year. Given those low odds, a firm grasp of your project's value, vision, timeline, and objectives is paramount to success later on.

Even if the request for your project came from higher up and is thus already approved, you'll face challenges throughout the life of your project that will require you to defend its worth. Prepare early so that you aren't caught off guard later on.

2. Sketch out a scope and goals for your project

While you're busy getting your project off the ground, the initiation phase transitions to the planning phase. As you assess how valuable your project is and what problem it's solving for the company, sketch out a scope and goals for your project. Give your project a clear vision when you understand scope for project management.

To help stay on track, try answering these questions:

- What is this project's main goal?
- What deliverables are needed to reach that goal?
- Who is the best person to own each deliverable?
- What risks exist for this project, and how can you avoid them?
- What is the scope of this project?

Susanne Madsen, a subject matter expert on project management, emphasizes the importance of being thorough during this project planning phase. She explains that it is essential to:

“...have a thorough requirements gathering phase where the team and the client draw up process flows and ensure that the requirements make sense and represent the clients' real needs. Creating demos, mock-ups, proof of concepts, prototypes and pilots are great ways of mitigating the risk of too many changes.” Making the project visual can clearly be an asset during this phase as a way to get everyone on the same page and ensure that you set realistic expectations. Diagrams like PERT charts and work breakdown structures can be very helpful in determining the scope and deliverables needed for your project.

A PERT chart, also referred to as a project network diagram, visualizes all of the task interdependencies before the project even begins so you can identify the minimum time required to execute the project.

A work breakdown structures segments large projects into smaller, more manageable pieces so you can clearly determine deliverables.

As any seasoned project manager knows, risks exist for every project, and goals and deliverables can change drastically at any time. Understanding what could potentially derail your team's progress is a key part of your role—clear the way for unimpeded progress early as much as you can through risk management, but prepare for future roadblocks, especially if you've done a similar project before.

3. Communicate roles, expectations, and objectives to the team

Communication is arguably the most important principle of project management. Clear communication with your team from the beginning about roles, expectations, progress, and changes to the project ensures that objectives aren't missed or forgotten. It also makes team members feel their contributions are valued and their concerns are heard.

Additionally, your communication responsibilities extend to stakeholders in the project, whether that's a client, leadership at your own company, or other external players.

Communicating with a number of stakeholders, each with their own concerns, can be difficult. Start by relaying a few of these points if you feel overwhelmed:

- The progress you've made along the project timeline
- The goals and advantages of the project
- The project's roadblocks and successes

When you're managing communication between several groups of people visuals can make a huge difference in your ability to stay on track. Waking up in the middle of the night because you forgot to send a new request to a designer or didn't update a stakeholder on a timeline issue isn't something anyone wants to experience. Kanban boards, Gantt charts, and flowcharts can eliminate undue stress for your team.

Instead of letting your team scatter, schedule a brief time to go over the project. When you do, consider these questions:

- Have all deliverables been met?
- Were all deliverables carried out to a standard of quality the team is proud of?
- What did your team do well?
- How could a project like this function better next time?

During this phase, having a templated record of your entire project can be extremely helpful, especially for large-scale or ongoing projects (explore our extensive library of project management templates). And as always, celebrate success. You have a wealth of roles over the course of a project, and being your team's cheerleader is one of the most important ones.

Depending on the method you use, your industry, and your own experience, your process and individual workflow may not always fit into one simple, step-by-step process. However, when projects are complicated or problems arise, returning to the basic principles of project management and equipping yourself with the right tools can be the difference between a good project and a great one.

4. Monitor progress and identify roadblocks

Though your role doesn't include creating a project's deliverables, all project managers know that the middle stages of a project remain busy. One of the main principles that defines the period after a project is executed is monitoring.

During this phase, ask yourself these questions:

Do all team members understand what's expected of them?

What roadblocks exist? How can you remove them for your team?

Is the project on time?

Are you communicating and staying organized?

Does the project need to be redirected from its original scope?

At this point, you and other team members may have more than one project going on at once, so it's your job to understand exactly how this project is going. During the middle phases, the waters of your project can become murky with changing demands from clients or executives, as well as unanticipated problems that threaten your carefully built budget. Diagrams like kanban boards and flowcharts can also be extremely helpful during this step to visualize the project's progress and increase transparency. If the stakeholders of a given project decide to change the scope or budget, you'll be responsible for rerouting the project in a sensible, pragmatic way.

5. Make sure all deliverables have been met and finalize the project

Wouldn't it be nice if, at the end of every project, you and your team had a spare day to catch up and celebrate a job well done? While most project managers would love to have dedicated debriefing time, it's pretty rare. Instead, you and your team are far more likely to scatter to other projects and looming deadlines elsewhere. Before this happens, however, keep in mind that you, as project manager, decide when to finalize a project. Especially during longer or recurring projects, a project may not officially "end" all at once.

Instead of letting your team scatter, schedule a brief time to go over the project. When you do, consider these questions:

Have all deliverables been met?

Were all deliverables carried out to a standard of quality the team is proud of?

What did your team do well?

How could a project like this function better next time?

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Depending on the method you use, your industry, and your own experience, your process and individual workflow may not always fit into one simple, step-by-step process. However, when projects are complicated or problems arise, returning to the basic principles of project management and equipping yourself with the right tools can be the difference between a good project and a great one.

II- Life Cycle

The life cycle can bring more cohesion to the project and ensure that all the team members, especially if there are multiple departments involved, are all on the same page and can work together with relative ease.

1- What is the project life cycle?

The project life cycle includes the steps required for project managers to successfully manage a project from start to finish.

There are five phases to the project life cycle. Each of these project phases represents a group of interrelated processes that must take place for a successful project.

2- What are the five stages of the project management life cycle?

a- Initiating phase

The initiating phase of the project life cycle consists of two separate processes: the project charter and stakeholder register. This phase is to determine the vision

for your project, document what you hope to accomplish through a business case, and secure approvals from a sanctioning stakeholder. The key components of the project charter include:

- Business case - Project scope - Deliverables - Objectives
- Resources needed - Milestone plan and timeline
- Cost estimate - Risks and issues - Dependencies

Taking the time to get your goals and objectives clearly defined will mean that the project will be easier to work on.

Everyone involved will be able to discuss their own suggestions or concerns and the budget and costs can be agreed and signed off upfront. Having this initiating phase is important not only for the project, but for all the teams involved to have their say on what is needed for the project.

b- Planning phase

During the planning phase, it is important that the first thing to do is outline and define the reason for the project. By answering the following questions, you can clearly see what the project needs to achieve.

- What exactly are we going to do?
- How are we going to do it?
- When are we going to do it?
- How will we know when we're done?

As part of the planning phase, you will need to work with the team to put the full infrastructure in place and delegate certain tasks. This plan should include:

- Project management plan - Project scope
- Work breakdown structure - Resource plan
- Budget estimation

Getting the plan in place, with the whole team's involvement can be tricky to work out. But giving every department a chance to be involved in the plan will mean that there are fewer issues further down the line.

c- Executing phase

The executing phase should involve the following vital parts:

- Team development - Stakeholder engagement
- Quality assurance - Communications
- Client management

This phase is where the magic happens — where most of the budget is allocated and most of the project deliverables are produced. You take your project plan and put it into action, whether that takes weeks, months, or even years.

Villanova University defines the goal of this phase as, “managing teams effectively while orchestrating timeline expectations and reaching benchmark goals.” still needs to be done.

During this time, communication is important, there will be times where the client or stakeholders will want to updates and progress reports.

Having a reliable project management system in place will save a lot of headaches for you and your team. It will be easier for tasks to be crossed off, see where deadlines and deliverables are up to and give you and the team insight into what still needs to be done.

With Adobe Workfront, you can keep the whole project team updated and make reporting to clients and stakeholders easier.

d- Monitoring and controlling phase

When in the monitoring and controlling phase you will need to make sure that you can keep an eye on the overall progress of the project as well as individual aspects.

You will always need to stay vigilant and keep up to speed with tracking and reporting with the team, so you are aware of any potential problems before they get out of hand.

It is also worth having another member of the project team (or one from each department) to act as another quality controller or reporter, they can help you keep track of everything in their team and have regular meetings to update on all aspects, so everyone is kept on track.

Blog: [Helping Your Team Manage & Track Time](#)

Blog: [4 Simple Ways to Keep Creative Projects On-Track](#)

e- Closing phase

The final phase of the project life cycle is the closing phase. It is more than simply checking off the project as done and closing the project down. It's essential to formally close the project and secure a sign-off or approval from the customer, stakeholders, and/or project sponsor.

This process might include:

- Delivering the project
- Hosting a post-mortem meeting
- Archiving project records
- Celebrating or acknowledging the achievement
- Officially disbanding or releasing the team.

The importance of this final step of the project life cycle can't be overstated, especially as more organizations are adopting the Hollywood model of work, where temporary teams come together around a specific project, and then disband and regroup for another project. This is important for project management teams, especially those that involve freelancers or consultants.

Session 3: Types and Aspects

I- Types

A. Waterfall Project Management

- This is similar to traditional project management
- Includes the caveat that each task needs
- Steps are linear and progress flows in one direction

B. Agile Project Management

- The basis originating in the 12 core principles of the Agile Manifesto
- Does not follow a sequential stage-by-stage approach

C. Lean Project Management

- This methodology is all about avoiding waste, both of time and of resources
- It depends on the preference of the project manager or the company

II- Aspects

1. Scope statement

- It is used to describe your project's objectives

2. Schedule and timeline

- It helps the project team complete their goals by their deadlines

3. Risk management

- It helps project managers prevent and prepare for potential hazards

4. Resources planning

- This includes accessing their supplies as well as assigning who would work best on a particular task:
 - People or human labor
 - Equipment
 - Materials
 - Skills or knowledge

5. Deliverables

- They are what the project team plans to produce
- They include: products, services or results

6. Critical success factors

- They are elements necessary in order for a project team to achieve its short-term and long-term mission

They include:

- Budget/cost
- Deadlines/time
- Employee satisfaction
- Improved marketing strategies
- Training and education
- Quality standards

7. Budget

- The budget aspect helps to see if your organization is making a profit or losing revenue.
- This component includes: tracking project financials, such as estimated costs, billing and profits.

8. Stakeholder list

- For tracking, make a table with four columns:
 - The name of the stakeholder
 - Their level of power
 - Their level of interest in the project
 - Concerns they have.

9. Work breakdown structure

- It divides a project into smaller tasks

It includes key components:

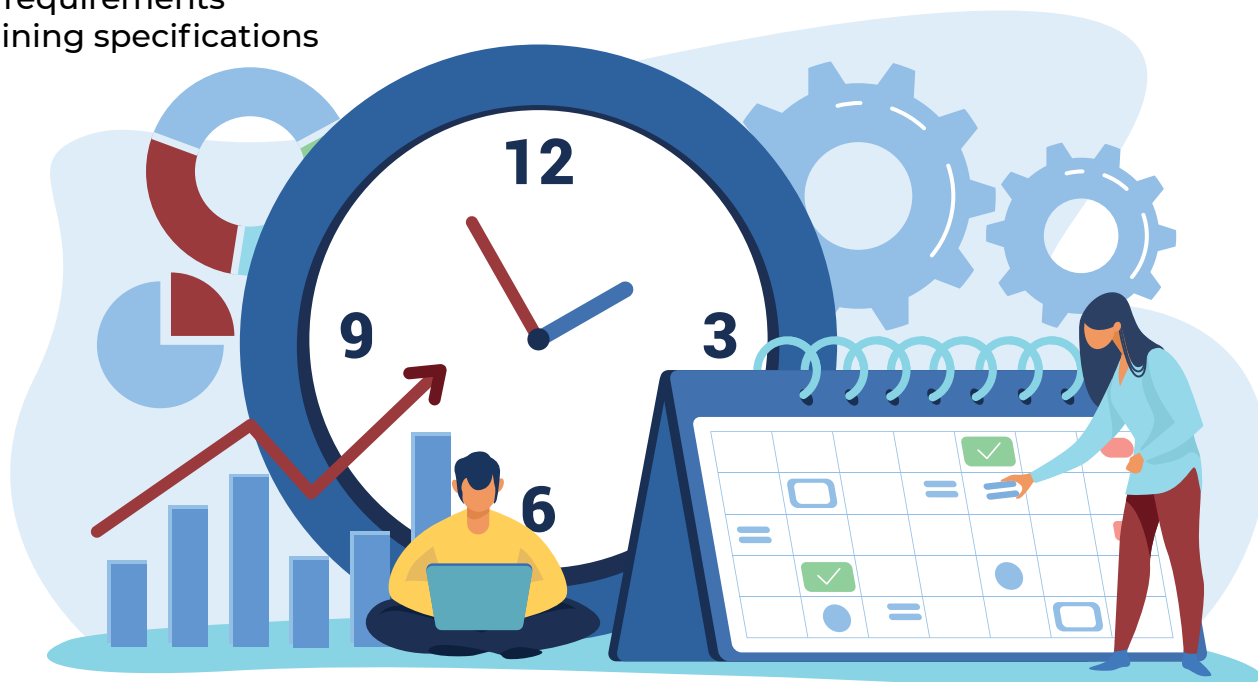
- Who is performing a particular activity
- The estimated duration for the task

10. Effective communication

- Transparency is important to keep team members and stakeholders updated on the progress made

11. Quality of the project

- Setting requirements
- Determining specifications



Topic 1

Principles of Project Management

Session 3: Types and Aspects

I- Types of Project Management

Many types of project management have been developed to meet the specific needs of certain industries or types of projects. They include the following:

A. Waterfall Project Management

This is similar to traditional project management but includes the caveat that each task needs to be completed before the next one starts. Steps are linear and progress flows in one direction—like a waterfall. Because of this, attention to task sequences and timelines are very important in this type of project management. Often, the size of the team working on the project will grow as smaller tasks are completed and larger tasks begin.

B. Agile Project Management

The computer software industry was one of the first to use this methodology. With the basis originating in the 12 core principles of the Agile Manifesto, agile project management is an iterative process focused on the continuous monitoring and improvement of deliverables. At its core, high-quality deliverables are a result of providing customer value, team interactions, and adapting to current business circumstances.

Agile project management does not follow a sequential stage-by-stage approach. Instead, phases of the project are completed in parallel to each other by various team members in an organization. This approach can find and rectify errors without having to restart the entire procedure.

C. Lean Project Management

This methodology is all about avoiding waste, both of time and of resources. The principles of this methodology were gleaned from Japanese manufacturing practices. The main idea behind them is to create more value for customers with fewer resources.

There are many more methodologies and types of project management than listed here, but these are some of the most common. The type used depends on the preference of the project manager or the company whose project is being managed.

Example of Project Management

Let's say a project manager is tasked with leading a team to develop software products. They begin by identifying the scope of the project. They then assign tasks to the project team, which can include developers, engineers, technical writers, and quality assurance specialists. The project manager creates a schedule and sets deadlines.

Often, a project manager will use visual representations of workflow, such as Gantt charts or PERT charts, to determine which tasks are to be completed by which departments. They set a budget that includes sufficient funds to keep the project within budget even in the face of unexpected contingencies. The project manager also makes sure the team has the resources it needs to build, test, and deploy a software product.

When a large IT company, such as Cisco Systems Inc., acquires smaller companies, a key part of the project manager's job is to integrate project team members from various backgrounds and instill a sense of group purpose about meeting the end goal. Project managers may have some technical know-how but also have the important task of taking high-level corporate visions and delivering tangible results on time and within budget.

II- Aspects

Project management is important in achieving better results for your organization. Through the act of planning and organizing, businesses are able to focus on what matters. This also helps team members all have the same understanding of what needs to be done.

As a result, employees tend to be happier since they feel their work contributes to the company's overall mission and they know what their expectations are. Other benefits of project management include higher risk tolerances, improved customer satisfaction, learning by retrospection and effective resource allocation. Project management is a helpful process for accomplishing company goals. While used for temporary situations, these planning methods can have lasting impacts and create quality deliverables for an organization.

Learning about the different components of the project management process can help you understand what key areas to consider in your next project. In this article, we explore project management and provide a list of 11 aspects of project management.

1. Scope statement

When beginning your project, create a scope statement to describe your project's objectives. Here you consider your customer's requirements and develop a work plan. This helps you understand what to include in the project to reach your

goal. Project scopes consider the amount of time and money to budget for this goal. For instance, a web development team's goal may be to build a new website with a budget of \$200.

2. Schedule and timeline

Following a schedule helps ensure a project team completes their goals by their deadlines. At the beginning of the project, a project manager outlines the project schedule so all team members are aware of due dates for tasks. The schedule includes which resources to use, such as who completes a task. Consider using a scheduling tool to help organize key activities.

3. Risk management

The risk management component of a project helps project managers prevent and prepare for potential hazards. They develop strategies to use when dealing with risks. This process consists of identifying a risk, analyzing it, creating a plan of action, implementing the action and monitoring that action.

4. Resources planning

When accessing what they have, project managers consider their resources. This includes accessing their supplies as well as assigning who would work best on a particular task based on their talents. Some resources include:

- People or human labor
- Equipment
- Materials
- Skills or knowledge

5. Deliverables

Deliverables are what the project team plans to produce. These include products, services or results from the project. Here the project team outlines in detail what they plan to detail. Include information about the product's size, quality or other standards. For example, a magazine company may work to create a 40-page fashion catalog.

6. Critical success factors

The critical success factors (CSF) are elements necessary in order for a project team to achieve its short-term and long-term mission. Usually, an organization selects five CSFs to prioritize their business around based on their company's strategic goal. Some items to select under your CSF include:

- Budget/cost
- Deadlines/time
- Employee satisfaction
- Improved marketing strategies
- Training and education
- Quality standards

7. Budget

To keep the project within their resources, project managers set a budget to follow. After conducting research for financial estimates, they present their budget to company leaders for approval. Because the budget is typically an estimate, the project manager also sets aside a contingency fund in case an item costs more than they predicted. The budget aspect of project management helps to see if your organization is making a profit or losing revenue. This component includes tracking project financials, such as estimated costs, billing and profits.

8. Stakeholder list

For every project, there are stakeholders with an influence on the project. To keep track of your project's stakeholders, consider making a table with four columns: the name of the stakeholder, their level of power, their level of interest in the project and concerns they have. For example, the CEO of a company has a high level of power with the company and a moderate amount of interest in the project, expressing a concern it won't meet their deadline.

9. Work breakdown structure

The work breakdown structure (WBS) divides a project into smaller tasks. This is a method that helps project managers work backward from their deliverables to find activities involved to get there. In the WBS, include key components, such as who is performing a particular activity and the estimated duration for the task.

10. Effective communication

Throughout the project process, effective communication and transparency are important to keep team members and stakeholders updated on the progress made. Let those involved know how the project matches your schedule expectations. Communication also involves praising team members when they reach a milestone achievement.

11. Quality of the project

When determining quality, the project team looks at are mindful about what the stakeholder or customer wants. To ensure the final product meets these standards of quality, a project team sets requirements and specifics. They then use a project audit or process checklist to check if the deliverables meet this quality.

Session 4: Project Success & Failure

I- How to Define Project Success

The Success Criteria

- Does the product or service meet the customers' needs?
- Does the outcome meet the business goals?
- Have new efficiencies been created?
- Will new processes affect the way team members interact?
- Does the outcome improve how things work?
- Have tools and support been put in place to make change easy on customers?

3 Tips for achieving project success

- Establish a baseline
- Get stakeholder buy-in and sign-off
- Use continuous measurements

Steps to Measure the Success of a Project

- Step 1: Review the Scope of the Project
- Step 2: Evaluate the Project Specifications
- Step 3: Analyze the Project Budget
- Step 4: Review Client Satisfaction
- Step 5: Review Internal Growth and Team Satisfaction

II- 6 reasons why projects fail

1. Lack of resource planning

Questions to ask:

- What human resources are required?
- What facilities are required?
- What outside vendors will we rely on?
- What knowledge resources might we be lacking?

2. Unclear Goals and Objectives

How to prevent it:

Your goals must be SMART:

- Specific
- Measurable
- Achievable
- Realistic
- Time-Bound

3. Lack of project visibility

How to prevent it:

- Have clear project tasks

4. Communication gaps

How to prevent it:

- Make sure everyone on the team understands what's expected from them

5. Scope creep

How to prevent it:

- Don't miss to budget the necessary time or resources

6. Unrealistic expectations

How to prevent it:

- Know your limitations



Topic 1

Principles of Project Management

Session 4: Project Success & Failure

I- How to Define Project Success

When you're planning a project, your immediate concern is 'Understanding the Goal.' Your objective is to deliver successful results that satisfy your stakeholders.

Back in the day, that was achieved by producing a product on time, on or below budget, with a high level of quality. But the final result is no longer the single measure of the project's success.

With the emphasis companies now place on engagement, it is important to involve your stakeholders in the project experience and to understand not only if the product functions properly, but how it impacts the organization and its priorities in other ways. New products and services mean change, which affects the way people work, the customer experience, a company's culture and their reputation. All of this is on the minds of your client, and they want to know that you are working to that end. This is today's expanded view of success criteria.

What does Success Criteria mean?

Success criteria are the standards that stakeholders will use to determine if the project performed to their expectations. And they can be looked at during the project life-cycle and after project close. These aren't based on just the budget or schedule, but on the way, the stakeholders – leadership, employees, and customers – are affected by what your project produces. You'll be asking yourself if the project:

Was accepted by the customer – Does the product or service meet the customer's needs? Does it perform as expected?

Align with the business case – Does the outcome meet the goals as stated in the business case? Was the project planned with the customer's priorities in mind?

Contribute to the organization workflows – Have new efficiencies or workarounds been created that will have a positive impact on performance?

Meet (or not disrupt) the organization's culture – Will new processes affect the way team members interact with each other or customers, or change the public perception of the company?

Preserve the current processes in the organization – Does the outcome improve or at least not change how things work today?

The adoption by the customers – Have tools and support been put in place to make change easy on customers, and does it improve their experience?

See, it's about the customer having a good experience, while the project was in flight and once the new product or service is running. If you want your projects to be considered successful you have to take these factors into account and turn them into real, measurable criteria. Start by defining what success means for your team and stakeholders.

3 Tips for achieving project success

You want to make sure that you give your project every chance at success. Here are some things that will make a big difference:

Establish a baseline – The baseline measure tells you how the areas of the business that your product will impact are performing today. You'll make your comparison against this data, so be sure to use the same measurement tools for baselining and measuring. If your goal is to improve call answer times, you need to know how long it takes Representatives to answer the phone now, so you know what you're trying to achieve.

Get stakeholder buy-in and sign-off – With well-defined targets and a baseline to perform against, you can engage your stakeholders, keep them updated, justify requests and get their support when you need it. Ask for sign-off to have a history of positive results that stakeholders can see.

Use continuous measurements – Improvements take time, so setting a very rigid set of criteria may not allow time for the new product or service to show any real impact. Set targets with a range – like improving performance by 25 to 35 percent over three months – to give yourself some room to grow.

How Do You Measure the Success of a Project?

You can measure the success of a project by reviewing project scope, evaluating project specifications, analyzing the project budget, and reviewing client and internal satisfaction.

These steps are described below.

Step 1: Review the Scope of the Project

Start by reviewing the requirements and deliverables that the team agreed upon at the beginning of the project. For each deliverable, note the required resources, tasks, and the time it took to complete.

Step 2: Evaluate the Project Specifications

Did the project meet the expectations and goals? You can determine this by assessing whether or not all the deliverables are completed and agreements are met within the expected timeframe.

Step 3: Analyze the Project Budget

The budget can be an essential indicator of project success. Look at the amount of time spent on the project, and whether or not it exceeded the budget.

Step 4: Review Client Satisfaction

Client satisfaction with the project result is vital. If they are not fully satisfied, they must be allowed to provide feedback, which you can take as insight for future projects to help generate repeat business.

Step 5: Review Internal Growth and Team Satisfaction

It's important that the project team feels good about their role and the project's result. Was the project challenging and interesting? Is the team satisfied with the quality of the deliverables? These factors contribute to the project team's sense of fulfillment and job satisfaction.

II- 6 reasons why projects fail and how to avoid it

Here's a look at some of the causes of project failure and how you can avoid them.

1. Lack of resource planning

We plan timelines. We plan meetings. We plan structure and themes and interfaces. But sometimes, in the midst of all that project planning, we forget to plan for our resources. It's a huge contributor to why projects fail. Project management involves resource management, often taking other projects into consideration. Most of us know that financial resource planning is important.

Here are a few questions you may want to ask when planning for other resources in your next project:

- What human resources are required? Which people and for how long? Are any of them currently working on another project or could they be called away before my project is completed?

- What facilities are required? Do we have the office space, desks, computers, meeting spaces, and production areas necessary to make this project a success?
- What outside vendors will we rely on? What are their turnaround times and limitations?
- What knowledge resources might we be lacking? Can I bring in an expert or conduct training to build the requisite project management skills for my team?

2. Unclear Goals and Objectives

One way to almost guarantee project failure is to begin work without clear project objectives and goals. After all, there's no way to know whether you've succeeded when you aren't completely sure what you're trying to accomplish.

Take a simple example on a personal level. Let's say you've resolved to "get in shape." What does that mean?

Do you want to lose a few pounds?

Build muscle?

Build endurance?

If you simply start exercising and/or eating better—which we should all be doing if we're honest—your physical condition will improve, but you won't truly know if you've succeeded. You need well-defined goals. Having unclear goals in your professional life is just as likely to lead to failure.

How to prevent it:

Several popular frameworks for goal setting, such as SMART goals and CLEAR goals are there but the essence is that your goals must be measurable and realistic. Don't just say you want to "lose weight," say you want to lose fifteen pounds in the next four months. That's both measurable and realistic. The projects you manage are more complex than that, which is why it's even more critical to define your objectives clearly

3. Lack of project visibility

No matter how well-planned your project is, a lack of visibility can lead quickly to failure. It's essential to create a project management system that provides visibility, not just for the project manager but for all team members. Visibility includes project transparency of task status, clear communication, and good document management.

How to prevent it:

When everyone knows the status of each project task, they can assist or adjust accordingly. It encourages proactive work and problem-solving. Document management doesn't have to be complicated. In fact, having a centralized, digital storage place for all project documents makes your job as a project manager easier as well as promoting visibility.

4. Communication gaps

It should go without saying, but communication in project management is the key. The tools your team uses to communicate should be explained and implemented from the outset of your project.

How to prevent it:

Whether it's email, text messaging, a chat service, or some combination of things, make sure everyone on the team understands what's expected and can use the technology you've selected. You can use project management software that offers chat, group meetings, etc to overcome these gaps.

Beyond the method of communication, make sure to set clear expectations and guidelines on the kinds of information that need to be communicated.

5. Scope creep

It seems so innocent at first. A simple customer request to add an item here, a brilliant idea to expand a service there, and before you know it, your project scope has outgrown and your team is over-extended. Scope creep happens when either the parameters of the project were not well-defined from the outset or there's pressure either internally from the team or externally from customers or bosses to take on tasks that were not part of the original project plan.

How to prevent it:

The problem with scope creep is that it often contributes to project failure. You haven't budgeted the time or resources necessary to complete the extra tasks, so what might have been a smashing success ends up a frustrating failure.

6. Unrealistic expectations

Sometimes disguised as dogged optimism, unrealistic expectations have destroyed many projects. As a project manager, it's absolutely essential to gain a clear picture of what your team can accomplish and in what time frame. Once you have aligned your expectations with reality, you must communicate them to the customer and often to your bosses.

How to prevent it:

With realistic expectations in place and understood by all the project stakeholders, your team has a much better chance at successful project completion.

How Kissflow can help you avoid project failure

While the pitfalls of project failure have been around for ages, there are new solutions thanks to technology. Project management tools can help you avoid project failure by keeping goals in focus, assisting with resource planning, providing visibility, and facilitating communication.

A good project management platform can help you move past the question of why projects fail and concentrate on the successful execution of your projects.

Kissflow Work Platform lets you create a project management software for non-project management. Its digital workspace is intuitive and enjoyable, a tool your whole team can utilize and appreciate. With beautiful visual tools and built-in communication channels, Kissflow can help you make your next project a success.

TOPIC 2: PLAN, PRIORITY & PRODUCTIVITY



Session 1: Project Planning

I- What is a Project Plan?

- A project plan is a series of formal documents that define the execution and control stages of a project.
- It includes considerations for risk management, resource management and communications, while also addressing scope, cost and schedule baselines.

II- Project Plan Documents

Project Charter:

- Provides a general overview of the project.
- It describes the project's reasons, goals, objectives, constraints, stakeholders, among other aspects.

Statement of Work (SOW):

- It defines the project's scope, schedule, deliverables, milestones, and tasks.

Work Breakdown Structure:

- Breaks down the project scope into the project phases, subprojects, deliverables, and work packages that lead to your final deliverable.

Project Plan:

- This document is divided in sections to cover the following:
 - scope management,
 - risk assessment,
 - stakeholder management,
 - the change management plan.
 - quality management,
 - resource management,
 - schedule management, and

III- How to Create a Project Plan

- The outline is divided in 6 steps:
 - Define your project's stakeholders, scope, quality, deliverables, milestones, success criteria and requirements.
 - Identify risks and assign deliverables
 - Organize your project team
 - List the necessary resources
 - Develop change management procedures
 - Create a communication plan

IV- Project Planning Terms

- | | |
|---------------|-------------------------|
| • Deliverable | • Stakeholder |
| • Tasks | • Milestone |
| • Resources | • Tracking & Monitoring |
| • Budget | |

V- The 12 Project Planning Steps

- | | |
|-------------------------------------|----------------------------------|
| • Outline the business case | • Meet with key stakeholders |
| • Define project scope | • Assemble a project team |
| • Determine a project budget | • Set project goals & objectives |
| • Outline project deliverables | • Create a project schedule |
| • Assign tasks to your team members | • Do a risk analysis |
| • Create your project plan | • Report your progress |



- **Outline the business case**

- The business case outlines reasons why the project is being initiated, its benefits and the return on investment.

- **Meet with key stakeholders**

- Identify who these key stakeholders are during the project planning process, from customers to regulators.

- **Define project scope**

- This refers to the work required to accomplish the project objectives and generate the required deliverables.

- **Assemble a project team**

- Gather a diverse group of experienced professionals to build a multi-disciplinary team that sees your project management plan from different perspectives.

- **Determine a project budget**

- You need resources such as equipment, materials, human capital, and of course, money.

- **Set project goals & objectives**

- Goals are the results you want to achieve.
- Objectives are measurable actions that must be taken to reach your goal.

- **Outline project deliverables**

- A deliverable can be a good, service or result that is needed to complete a task, process, phase or a subproject.

- **Create a project schedule**

- Schedules are made up by collecting all the tasks needed to reach your final deliverable, and setting them on a project timeline that ends at your deadline.

- **Assign tasks to your team members**

- Roles and responsibilities must be clearly defined, so they know what to do.

- **Do a risk analysis**

- Scope risk
- Technical risk
- Schedule risk
- Other

- **Create your project plan**

- Project charter
- Project schedule
- Project budget
- Project scope statement
- Risk management plan
- Change management plan
- Cost management plan
- Resource management plan
- Stakeholder management plan

- **Report your progress**

- Construct a work breakdown structure (WBS)

Topic 2

Plan, Priority & Productivity

Session 1: Project Planning

I- What is a Project Plan

A project plan is a series of formal documents that define the execution and control stages of a project. The plan includes considerations for risk management, resource management and communications, while also addressing scope, cost and schedule baselines.

Project Manager allows you to make detailed project plans with online Gantt charts that schedule task dependencies, resource hours, labor costs, milestones and more. Plus, your team can execute the plan in any of our five project views, while you track progress along the way with dashboards. Start today for free. The project plan, also called project management plan, answers the who, what, where, why, how and when of the project—it's more than a Gantt chart with tasks and due dates. The purpose of a project plan is to guide the execution and control project phases.

II- Project Plan Documents

- **Project Charter:** Provides a general overview of the project. It describes the project's reasons, goals, objectives, constraints, stakeholders, among other aspects.

- **Statement of Work:** A statement of work (SOW) defines the project's scope, schedule, deliverables, milestones, and tasks.

- **Work Breakdown Structure:** Breaks down the project scope into the project phases, subprojects, deliverables, and work packages that lead to your final deliverable.

- **Project Plan:** The project plan document is divided in sections to cover the following: scope management, quality management, risk assessment, resource management, stakeholder management, schedule management and the change management plan.

This guide aims to give you all the information and resources you need to create a project plan and get it approved by your customers and stakeholders. Let's start with the basics of writing a project plan.

III- How to Create a Project Plan

Your project plan is essential to the success of any project. Without one, your project may be susceptible to common project management issues such as missed deadlines, scope creep and cost overrun. While writing a project plan is somewhat labor intensive up front, the effort will pay dividends throughout the project life cycle.

The basic outline of any project plan can be summarized in these six steps:

- Define your project's stakeholders, scope, quality baseline, deliverables, milestones, success criteria and requirements. Create a project charter, work breakdown structure (WBS) and a statement of work (SOW).
- Identify risks and assign deliverables to your team members, who will perform the tasks required and monitor the risks associated with them.
- Organize your project team (customers, stakeholders, teams, ad hoc members, and so on), and define their roles and responsibilities.
- List the necessary project resources, such as personnel, equipment, salaries, and materials, then estimate their cost.
- Develop change management procedures and forms.
- Create a communication plan, schedule, budget and other guiding documents for the project.

Each of the steps to write a project plan explained above correspond to the 5 project phases, which we will outline in the next section.

IV- Project Planning Terms

Before we dive into how to create a project plan, it helps to be familiar with some of the terms that you'll run across. Here is a list of general terms you'll encounter in this guide.

Deliverable: The results of a project, such as a product, service, report, etc.

Stakeholder: Anyone with a vested interest in the project—project manager, project sponsor, team members, customers, etc.

Tasks: Small jobs that lead to the final deliverable.

Milestone: The end of one project phase, and the beginning of the next.

Resources: Anything you need to complete the project, such as personnel, supplies, materials, tools, people and more.

Budget: Estimate of total cost related to completing a project.

Tracking & Monitoring: Collecting project data, and making sure it reflects the results you planned for.

V- The 12 Project Planning Steps

Outline the business case

Meet with key stakeholders

Define project scope

Assemble a project team

Determine a project budget

Set project goals & objectives

Outline project deliverables

Create a project schedule

Assign tasks to your team members

Do a risk analysis

Create your project plan

Report your progress

By following these project planning steps, you'll clarify what you need to achieve, work out the processes you need to get there and develop an action plan for how you are going to take this project plan outline forward.

1. Outline the Business Case

If you have a project, there's a reason for it—that's your business case. The business case outlines reasons why the project is being initiated, its benefits and the return on investment. If there's a problem that is being solved, then that problem is outlined here. The business case will be presented to those who make decisions at your organization, explaining what has to be done, and how, along with a feasibility study to assess the practicality of the project. If approved, you have a project.

2. Meet with Key Stakeholders

Every project has stakeholders, those who have a vested interest in the project. From the ones who profit from it, to the project team members who are responsible for its success. Therefore, any project manager must identify who these key stakeholders are during the project planning process, from customers to regulators. Meeting with them is crucial to get a better picture of what the project management plan should include and what is expected from the final deliverable.

3. Define Project Scope

It refers to the work required to accomplish the project objectives and generate the required deliverables. The project scope should be defined and organized by a work breakdown structure (WBS). Therefore, the project scope includes what you must do in the project (deliverables, sub deliverables, work packages, action

items), but also what is nonessential. The latter is important for the project plan, because knowing what isn't high priority helps to avoid scope creep; that is, using valuable resources for something that isn't key to your project's success.

4. Assemble a Project Team

You'll need a capable project team to help you create your project plan and execute it successfully. It's advisable to gather a diverse group of experienced professionals to build a multi-disciplinary team that sees your project management plan from different perspectives.

5. Determine a Project Budget

Once you define your project scope, you'll have a task list that must be completed to deliver your project successfully. To do so, you'll need resources such as equipment, materials, human capital, and of course, money. Your project budget will pay for all this. The first step to create a project budget is to estimate the costs associated with each task. Once you have those estimated costs, you can establish a cost baseline, which is the base for your project budget.

6. Set Project Goals & Objectives

Goals and objectives are different things when it comes to planning a project. Goals are the results you want to achieve, and are usually broad. Objectives, on the other hand, are more specific; measurable actions that must be taken to reach your goal. When creating a project plan, the goals and objectives naturally spring from the business case, but in this stage, you go into further detail. In a sense, you're fine-tuning the goals set forth in the business case and creating tasks that are clearly defined. These goals and objectives are collected in a project charter, which you'll use throughout the project life cycle.

7. Outline Project Deliverables

A project can have numerous deliverables. A deliverable can be a good, service or result that is needed to complete a task, process, phase, subproject or project. For example, the final deliverable is the reason for the project, and once this deliverable is produced, the project is completed. As defined in the project scope, a project consists of subprojects, phases, work packages, activities and tasks, and each of these components can have a deliverable. The first thing to do is determine what the final deliverable is, and how you will know that the quality meets your stakeholder's expectations. As for the other deliverables in the project, they must also be identified and someone on the team must be accountable for their successful completion.

8. Create a Project Schedule

The project schedule is what everything hangs on. From your tasks to your budget, it's all defined by time. Schedules are made up by collecting all the tasks needed to reach your final deliverable, and setting them on a project timeline that ends at your deadline. This can make for an unruly job ahead, which is why schedules are broken into phases, indicated by milestones, which mark the end of one project phase and the beginning of the next.

9. Assign Tasks to Your Team Members

The plan is set, but it still exists in the abstract until you take the tasks on your schedule and begin assigning them out to your team members. Their roles and responsibilities must be clearly defined, so they know what to do. Then, when you assign them tasks from your plan, they should be clear, with directions and any related documentation they will need to execute the tasks.

10. Do a Risk Analysis

Every project has some level of risk. There are several types of risk such as scope risk, technical risks and schedule risk, among others. Even if your project plan is thorough, internal and external factors can impact your project's time, cost and scope (triple constraint). Therefore, you need to regard your planning as flexible. There are many ways to prepare for risk, such as developing a change management plan, but for now, the most important thing to do is to track your progress throughout the execution phase by using project status reports and/or project planning software to monitor risk.

11. Create your Project Plan

As discussed above, a project management plan is a document that's made of several elements. Before we get into a detailed explanation of each of them, it's important to understand that you should include them all to have a solid project plan. The components that you'll need might vary depending on your project, but in general terms, you'll need these main documents to create your project management plan:

- Project charter
- Project schedule
- Project budget
- Project scope statement
- Risk management plan
- Change management plan
- Cost management plan
- Resource management plan
- Stakeholder management plan

12. Report Your Progress

Your ultimate goal is to ensure a successful project for your stakeholders. They're invested, and will not be satisfied twiddling their thumbs without looking at project status reports to track progress. By constructing a work breakdown structure (WBS) during the project planning phase you can break down the project for them so that they understand how your project plan will be executed. Keeping stakeholders informed is important to manage their expectations and ensure that they're satisfied. Having regular planning meetings where you present progress reports are a great way to show them that everything is moving forward as planned and to field any questions or concerns they might have. Your stakeholder management plan will specify how you'll engage stakeholders in the project.

Session 2: Prioritization

I- What Is Priority in Project?

- Priority refers to the urgency and importance of a task or project.

II- What Is Project Prioritization?

- Project prioritization is the process of determining which potential and existing projects are the most urgent and important.
- This process involves evaluating the criteria that are most relevant to your business and applying them to all of your projects.

III- Why Is PP Important?

- Project Prioritization ensures that you correctly allocate company resources based on your unique needs.
- By prioritizing tasks, a company can minimize the time and money it spends on less urgent and important projects.

IV- Priority Levels for Projects

- You can classify projects as high, middle, low, or no importance.
- The prioritization criteria and framework that you choose will determine the priority level of each project.

V- Project Prioritization Process

- Project Prioritization processes help create frameworks to rank projects based on a consistent set of variables. The techniques and processes are:

1. The Kano Model

It suggests that the features available in a final product determine a customer's satisfaction with that project.

2. The Payback Period

It is the time it takes to recoup the cost of an investment. When calculating the payback period, note both ongoing costs and income potential.

3. Net Present Value

It compares the current cost of a project to the ROI.

VI- Benefits of Project Prioritization

- There are many benefits to prioritizing projects:
 - Increased Efficiency
 - Increased Team Cohesion
 - Improved Buy-In

VII- When to Prioritize Projects?

- Prioritizing projects should be a regular part of a project manager's schedule.
- Needs change over the course of a venture, so it is important to assess how current and potential projects rank in the portfolio at all times.

Project Prioritization Templates

PAIRWISE PROJECT PRIORITIZATION TEMPLATE

	New office chairs	Renovate break room	Product line expansion	Overhaul onboarding procedures	Update cloud security protocols	TOTAL
New office chairs		1	0	0	0	1
Renovate break room	0		0	0	0	0
Product line expansion	1	1		0	0	2
Overhaul onboarding procedures	1	1	1		0	3
Update cloud security protocols	1	1	1	1		4

Project Scoring Criteria Prioritization Template

PROJECT SCORING CRITERIA PRIORITIZATION TEMPLATE

RESPONDENTS	CRITERIA 1	MOST IMPORTANT	MORE IMPORTANT	IMPORTANT	NEUTRAL	IMPORTANT	MORE IMPORTANT	MOST IMPORTANT	CRITERIA 2
Dave	Initial Budget						X		3 Month Timeline
Kyle	Initial Budget	X							3 Month Timeline
Laura	Initial Budget					X			3 Month Timeline
TOTAL		-3						3	
RESULT					0				
					Neutral				
RESPONDENTS	CRITERIA 1	MOST IMPORTANT	MORE IMPORTANT	IMPORTANT	NEUTRAL	IMPORTANT	MORE IMPORTANT	MOST IMPORTANT	CRITERIA 2
Dave	Ongoing Costs						X		Potential Risks
Kyle	Ongoing Costs		X						Potential Risks
Laura	Ongoing Costs			X					Potential Risks
TOTAL		-3						2	
RESULT					-1				
					Criteria 1 Slightly More Important				
RESPONDENTS	CRITERIA 1	MOST IMPORTANT	MORE IMPORTANT	IMPORTANT	NEUTRAL	IMPORTANT	MORE IMPORTANT	MOST IMPORTANT	CRITERIA 2
Dave	Expand Product Line		X						Customer Satisfaction
Kyle	Expand Product Line	X							Customer Satisfaction
Laura	Expand Product Line						X		Customer Satisfaction
TOTAL		-5						2	
RESULT					-3				
					Criteria 1 Most Important				

CRITERIA WEIGHT RESULT

1. Expand Product Line
2. Ongoing Costs
- Tie - 3. 3 Month Timeline & Initial Budget
5. Potential Risks

Weighted Project Prioritization Scoring Template

WEIGHTED PROJECT PRIORITIZATION SCORING TEMPLATE

Enter scores in the chart below based on your project's needs. The white numbers are through July 15. Green numbers are the final results from the Project Performance Score.			TOTAL WEIGHT											TOTAL WEIGHT (MAX)		
			Total weight values should equal 100											100		
PROJECT	PROJECT DURATION	SCORE	10	10	10	10	10	10	10	10	10	10	10	100	WEIGHT SCORE	SCORE VALUE
Initial Budget	100%	Score of 100% of the budget was spent on getting things done. No extra costs.	10	10	10	10	10	10	10	10	10	10	10	100	10	100
	100%	The project team needs to improve. The budget was not used as planned.	10	10	10	10	10	10	10	10	10	10	10	100	10	100
Update cloud security protocols	100%	A potential security issue was found with previous information. It was not the same. The project team needs to improve. The budget was not used as planned.	10	10	10	10	10	10	10	10	10	10	10	100	10	100
Project Risk Assessment	100%	A potential security issue was found with previous information. It was not the same. The project team needs to improve. The budget was not used as planned.	10	10	10	10	10	10	10	10	10	10	10	100	10	100
Overall onboarding procedures	100%	We would like to improve the onboarding process. The project team needs to improve. The budget was not used as planned.	10	10	10	10	10	10	10	10	10	10	10	100	10	100

Topic 2

Plan, Priority & Productivity

Session 2: Prioritization

I- What Is Priority in Project Management?

In project management, priority refers to the urgency and importance of a task or project. Project managers use priority to determine who will take ownership of each task and when to expect results.

There are many factors that determine priority, including time and money spent, available and needed resources, and company-specific needs. Project and program managers must weigh these factors against one another to determine which project is the highest priority.

II- What Is Project Prioritization?

Project prioritization is the process of determining which potential and existing projects are the most urgent and important. This process involves evaluating the criteria that are most relevant to your business and applying them to all of your projects.

You may rank project priority based on potential return on investment (ROI) or on how critical each project is to a department. For example, projects related to production infrastructure or web-based security might rank highly. All companies have different needs that require unique prioritization strategies.

Many organizations struggle with prioritization because all projects have some degree of urgency and importance. The best strategy is to establish a strategic planning framework so that you can easily incorporate the company's goals and priorities into your prioritization process.

III- Why Is Project Prioritization Important?

Project prioritization ensures that you correctly allocate company resources based on your unique needs. By prioritizing tasks, a company can minimize the time and money it spends on less urgent and important projects.

A 2016 survey by the Project Management Institute found that only 52 percent of projects met the original goals and business intent when project management culture was low priority. However, that number increased by almost 20 percent

when companies prioritized project management culture. Project management and project prioritization are crucial to a project's success.

How to Prioritize Your Projects

A project prioritization process is essential for keeping criteria consistent across a portfolio and for addressing the specific needs and goals of an organization. Here are the basic steps of prioritizing a list of projects:

Create a List of Projects: Create a list of potential and existing projects. Consult high-ranking executives, department heads, and project leaders to ensure that you accurately assess the company's project needs.

Organize Projects by Obvious Priority Level:

In some cases, project priority will be obvious. "Prioritizing your projects involves making a list of individual projects and then separating the urgent and important ones, so you know what you have to focus on immediately," suggests Trevor Larson, Co-Founder and CEO of Nectar.

Determine Prioritization Criteria: When priority levels of projects are not immediately obvious, determine prioritization criteria based on your company's specific needs and goals.

Analyze and Rank Tasks: Apply these prioritization criteria to your projects to determine the urgency and importance of each and to rank them accordingly.

You may consider using a matrix or template to help with your prioritization efforts. Prioritization templates are useful tools to aid in your decision-making and help track your prioritization process. There are also specific details regarding IT project prioritization, which may be helpful if you're trying to prioritize projects for IT-focused teams.

IV- Priority Levels for Projects

You can classify projects as high, middle, low, or no importance. Another way to think of these levels is "do, delegate, schedule, and delete." The prioritization criteria and framework that you choose will determine the priority level of each project.

To gain a greater understanding of how to determine priority levels, read our guide to using priority matrices.

V- Project Prioritization Process

Project prioritization processes help create frameworks to rank projects based on a consistent set of variables. Here is a list of specific techniques and processes for determining project prioritization:

Kano: The Kano model suggests that the features available in a final product determine a customer's satisfaction with that project. Identify the features that will provide a high level of satisfaction to the end user and prioritize those projects.

Payback Period: The payback period is the time it takes to recoup the cost of an investment. When calculating the payback period, note both ongoing costs and income potential. While a project with a shorter payback period may be preferable, you should also consider the project's duration and its potential for ongoing returns. This is a straightforward method that focuses on cash flow and does not account for potential risks or hurdles.

Net Present Value: Net present value compares the current cost of a project to the ROI. Net present value takes the potential for discounted cash flow into account but leaves out many non-financial variables.

VI- Benefits of Project Prioritization

There are many benefits to prioritizing projects. Your team will spend their time more efficiently, stay more organized, and increase the success rate of their projects.

Here is a list of benefits that experts have noted from implementing project prioritization strategies:

Increased Efficiency:

Lester McLaughlin, VP of Operations at Blue National, shares his company's experience with improved prioritization: "We've certainly seen an improvement to our workflow. Given the overwhelming amount of demand for our services, we don't have time to waste on avoidable inefficiencies," he says.

Improved Organization: Prioritization processes organize projects and tasks into a hierarchy that is easier to manage. "I like to use an Eisenhower matrix that categorizes projects as important or not important and urgent or not urgent. Based on what square of the matrix a project falls into, the task becomes

something I must do immediately, something I must decide on when to tackle, something that I can delegate to a direct report, or something I can remove from my list altogether," says Larson.

Increased Success Rate: Standardized prioritization practices ensure that projects adhere to company goals and needs.

Increased Team Cohesion:

Project prioritization decreases stress by increasing project visibility and improving communication within a team. "Prioritizing projects in our organization is essential to stress and productivity management. Employees are happier and more fulfilled when they can consistently be submitting work without the stress of what comes next," says Michael Steele, CEO and owner of Flywheel Digital.

Improved Buy-In: Effective project prioritization builds trust in project managers over time. Executives are more likely to support projects led by employees with a track record of success.

Competing Priorities in Project Management:

Competing priorities can be a barrier to success. Identifying the most important prioritization criteria for an organization can be difficult, but maintaining visibility and communication is key to avoiding unwelcome surprises.

Make sure that you involve every stakeholder in selecting your prioritization criteria. Doing so will help mitigate conflict by allowing team members with competing priorities to be heard. Once you have selected your prioritization criteria, be sure to keep them consistent throughout the company.

"With competing priorities, it makes sense to first get a second opinion from a colleague or trusted coworker to ensure you are interpreting the nature of the priorities correctly and that they are actually competing. If they are competing for importance, prioritize the one whose risk of failure increases over time, due to things like changing market conditions or manpower complications because of holidays or seasonal downturns," suggests Larson.

Additionally, Steele suggests that companies use project management software to help track tasks and stay organized. "[PM software] helps everyone feel like the work they're doing is far more manageable, even with competing priorities," he says. "It can be hard to prioritize the internal tasks over those that contribute

directly to ROI. Still, we prioritize them based on estimated value to our team, which holds an important value for us as a company, even if it is not directly reflected in the bottom line.”

VII- When to Prioritize Projects

Prioritizing projects should be a regular part of a project manager’s schedule. Needs change over the course of a venture, so it is important to assess how current and potential projects rank in the portfolio at all times.

If a project manager notices a lack of project visibility, process inconsistencies, or a breakdown in collaboration, then it is likely time to reevaluate priorities. These issues may have various causes, but they point to a problem with unclear or obsolete priority criteria.

Session 3: Productivity

Introduction

Productivity is a measure of economic performance that compares the amount of goods and services produced (output) with the amount of inputs used to produce those goods and services.

We can think of productivity as a ratio of output over input. The more we increase output relative to input, the more productivity increases.

$$\text{Productivity} = \frac{\text{Output}}{\text{Input}}$$

Productivity in a Person

- Productivity is a measure of efficiency of a person completing a task
- We often assume that productivity means getting more things done each day. Wrong
- Productivity is getting important things done consistently

I- Defining Productivity at Work

Workplace productivity can be defined as how efficient your workforce is, which can be measured by the number of goods they produce or services they provide in a given time.

II- Types of Productivity

- Labor productivity: measures the total economic output (revenue) per labor hour
- Capital productivity: determines the efficiency in which capital (such as machinery) is used to produce a specific output
- Material productivity: measures the total economic output generated per unit of material used

III- Project Productivity

- Productivity in project work is determined by observing the relationship between final results and cost or time
- That ratio if consistently measured at regular intervals. A record of productivity trends
- Productivity can also be seen as the product of effectiveness and efficiency

IV- Measuring Project Productivity

- Productivity is typically measured by comparing an aggregate output with a single input or comparing an aggregate input with an aggregate output, over time
- Productivity is a measure of how efficiently a person completes a task

V- Employee Productivity Methods

Method 1: Management by Objectives

Method 2: Measuring Quantitative Productivity

Method 3: Measuring Productivity by Profit

Establish a Baseline

- Define and Measure Tasks (Not Hours)
- Set Clear Objectives and Goals
- Carry Out a Client Survey to Getting Insight

VI- KPI in Project Management

- KPIs, or key performance indicators, use data to measure the factors that make a project successful
- They help pinpoint how work is progressing and show areas of weakness in your process

VII- KPIs for Productivity

There are 9 Productivity Metrics & KPIs to Measure:

- Projects completed
- Sales close rate
- Sales growth
- Revenue per employee
- Effectiveness ratio
- Total cost of workforce
- Overtime hours
- Turnover rate
- Recruiting conversion rate

VIII- 5 Steps to Maximize Productivity

- Keep a work log for at least a week
- Analyze your activities
- Delegate non-productive activities
- Calculate the time required
- Prioritize your remaining activities

IX- Factors That Affect Productivity

- | | |
|---|-------------------------------------|
| ● Work Environment | ● Employee Wellness |
| ● Training & Career Development Opportunities | ● Diversity |
| ● Processes | ● Technology And Production Factors |
| ● Pay Structure | ● Tools |

X- Productivity Tools

- Mobile Office
- Improving Workflow
- Unified Communications
- Project Management
- Resource Planning
- Business Intelligence

XI- The 5 Key Performance Indicators

- Revenue growth
- Revenue per client
- Profit margin
- Client retention rate
- Customer satisfaction

XII- About Team Productivity

A- What do you Need to be Productive?

- Productive people have the tools they need to do the job
- They don't waste time to work out how to get things done
- A productive team environment is one where people are encouraged to do their best work

B- Ways to Improve Productivity

- Set realistic goals
- Monitor progress
- Hold standing meetings
- Create a healthy work environment
- Give your team the right tools

C- Increasing Individual Productivity

- Learn to prioritize
- Schedule your day strategically
- Delegate
- Reduce distractions
- Stop multitasking
- Take breaks
- Have fewer meetings



Topic 2

Plan, Priority & Productivity

Session 3: Productivity

Productivity is a measure of economic performance that compares the amount of goods and services produced (output) with the amount of inputs used to produce those goods and services.

Example of Productivity

The most regularly used input is labor hours, while the output can be measured in units produced or sales. For instance, if a factory produced 10,000 widgets last month while being billed for 5,000 hours worth of labor, productivity would simply be two widgets per hour (10,000 / 5,000).

Productivity in a Person

Productivity is a measure of efficiency of a person completing a task. We often assume that productivity means getting more things done each day. Wrong. Productivity is getting important things done consistently. And no matter what you are working on, there are only a few things that are truly important.

I- Defining Productivity at Work

Workplace productivity can be defined as how efficient your workforce is, which can be measured by the number of goods they produce or services they provide in a given time.

II- Types of Productivity

Labor productivity: measures the total economic output (revenue) per labor hour. Capital productivity: determines the efficiency in which capital (such as machinery) is used to produce a specific output. Material productivity: measures the total economic output generated per unit of material used.

III- Project Productivity

Productivity in project work is determined by observing the relationship between final results and cost or time. That ratio if consistently measured at regular intervals. A record of productivity trends. Productivity can also be seen as the product of effectiveness and efficiency.

IV- Measuring Project Productivity

Productivity is typically measured by comparing an aggregate output with a single input or comparing an aggregate input with an aggregate output, over time. Productivity is a measure of how efficiently a person completes a task.

V- The 3 Best Methods to Measure Employee Productivity

Method 1: Management by Objectives

Method 2: Measuring Quantitative Productivity

Method 3: Measuring Productivity by Profit

Establish a Baseline

Define and Measure Tasks (Not Hours)

Set Clear Objectives and Goals

Carry Out a Client Survey to Getting Insight

VI- KPI in Project Management

KPIs, or key performance indicators, use data to measure the factors that make a project successful. They help pinpoint how work is progressing and show areas of weakness in your process. They're a great way to uncover areas that could lead to failure and to make corrections before it's too late.

VII- What are the KPIs for Productivity?

(9 Productivity Metrics & KPIs to Measure)

1. Projects completed
2. Sales close rate
3. Sales growth
4. Revenue per employee
5. Effectiveness ratio
6. Total cost of workforce
7. Overtime hours
8. Turnover rate
9. Recruiting conversion rate

VIII- The 5 Steps to Productivity

(There are 5 Steps to maximize your productivity)

1. Keep a work log for at least a week.

2. Analyze your activities.
3. Delegate non-productive activities.
4. Calculate the time required for any remaining low priority activities.
5. Prioritize your remaining activities.

IX- Factors That Affect Productivity

- Work Environment. As you can imagine, no one enjoys working in a negative or toxic environment
- Training & Career Development Opportunities
- Processes
- Pay Structure
- Employee Wellness
- Diversity
- Technology and Production Factors
- Tools

X- Productivity Tools Your Enterprise Can't Go Without

- Mobile Office
- Improving Workflow
- Unified Communications
- Project Management
- Resource Planning
- Business Intelligence

XI- The 5 Key Performance Indicators

- Revenue growth
- Revenue per client
- Profit margin
- Client retention rate
- Customer satisfaction

XII- About Team Productivity

First, let's look at what we are talking about when we're thinking about how to increase team productivity.

Team productivity is a measure of how much work the team can do, and still get a quality result.

If you work in the North Pole, like Buddy the Elf, you can measure productivity easily, by the number of Etch-a-Sketches produced in a day.

But in knowledge work environments, we don't actually measure team productivity. There isn't an amount of widgets to be counted to see visually how productive we've been that day.

Instead, productivity is a measure of how the team feels, and how you, as the team leader, feel about their output.

A- What do you need to be productive?

Productive people have the tools they need to do the job. They don't waste time looking for stuff or trying to work out how to get things done because there are systems, tools and processes that support them.

A productive team environment is one where people are encouraged to do their best work. It's part of a positive team culture.

B- Ways to Improve Productivity

1. Set realistic goals

Here we are talking about goals again! Really, we can't emphasize this enough. You, your team, your whole company you all need good team goals that are understandable and attainable. Lack of well-defined goals and measures is a major contributor to project failure, accounting for 37% of failed projects according to one Project Management Institute survey.

Good goals are realistic, clear, and measurable. You can assess whether your goals are good by asking the following questions:

Can we accomplish this goal with the time, resources, and project management skills we currently have? (Is it realistic?)

Do we know exactly what is being asked of us? (Is it clear?)

Are there quantifiable indicators with which we can judge our success around each goal? (Is it measurable?)

The goals you set for your team will be different from your individual goals of course. (You have individual goals, right?) During the project plan, don't forget to get your team's input on what their goals should be as a group and as individuals.

2. Monitor progress

When you plan your project, you establish key performance indicators (KPIs) in the form of:

- Budgets
- Project timelines and
- Quality expectations

During the course of your project, you should regularly check your KPIs and keep track of project progress so you can catch issues and make corrections quickly. Having good reporting tools greatly increases the accuracy and ease of monitoring. Don't forget to celebrate successes when your KPIs tell you the team has achieved a goal.

3. *Hold standing meetings*

We already mentioned that you should avoid unnecessary meetings. When you really do need to have a group of people together to discuss something, consider making it a standing meeting. Sometimes called 'standups', a standing meeting is exactly what it sounds like: a meeting where everyone is standing.

The benefit of a standing meeting is that it reduces the tendency to waste time. If everyone is settled around a conference table, you're more prone to chit-chat and to run off on tangents. In a standing meeting, everyone has the sense that the meeting is meant to be brief (it is), and they'll stick to the subject at hand.

4. *Create a healthy work environment*

A positive work environment contributes to productivity in multiple ways such as the Pomodoro technique all of which contribute to increased productivity. When your team members are happy, they're more likely to think creatively, take calculated risks, support their coworkers, and stay organized at work longer. You can also have some productivity games to plan within teams that help to align them together.

5. *Give your team the right tools*

No matter how happy, committed, or skilled your team members are, they can benefit from having good tools at their disposal. The project management tool has come a long way in the past several years, and you should take advantage of it.

C- Increasing Individual Productivity

1. *Learn to prioritize*

Most people end up as project managers because they are good at getting things done. Then you become a project manager and are suddenly expected to get more things done in the same amount of time. How do you decide what to tackle first? One simple tool for prioritizing is the Eisenhower Matrix.

Also known as the Urgent-Important Matrix, this method helps you prioritize tasks based on their levels of urgency and importance. Tasks fall into one of four categories:

- Urgent and important
- Not urgent, but important
- Not important, but urgent
- Not urgent and not important

It's helpful to visualize your Eisenhower Matrix by drawing a simple chart. Make the Eisenhower Matrix a regular part of your routine, and commit to following through and the insights you gain.

2. *Schedule your day strategically*

Some people arrive at the office full of energy, and some of us need an hour and a cup of coffee before our brains are fully operational. Take note of when you're most productive at work, and schedule the most difficult tasks for those times. If the post-lunch slump always gets you, use that time to check emails or pop into a coworker's office to touch base (only make sure you don't interrupt her most productive time in the process!).

3. *Delegate*

One of the biggest challenges of project management is realizing that you cannot do it all. You may have been made project manager because you're really good at getting things done.

That's great! But now there are many more things for which you're responsible. If tasks are piling up, assess which ones must be done by you and delegate tasks that can be passed to someone else.

4. *Reduce distractions*

We live in a distraction-filled world, and whether we realize it or not, all those distractions are killing our productivity. So turn off the email notifications, set your phone to silent, and hang a 'do not disturb' sign on your door. If it's impossible to focus in your actual office, carve out time elsewhere each day, whether that's a coffee shop up the road, an unused conference room, or a janitor's closet where no one will think to look for you.

5. *Stop multitasking*

Multitasking is a myth. Scientific research has demonstrated that multitasking is actually switching rapidly between tasks and that it costs us time and energy each time we switch. So instead of doing two (or more) things at once, with the help of task management, tackle your to-do list one item at a time and don't move on until an item is completed.

6. Take breaks

While it may feel counterproductive to take breaks, studies show that taking breaks can increase productivity. Breaks are also good for your physical and mental health and can help re-energize you for the task at hand.

One exception is that when you're in a 'flow'—a state of effortless productivity—it's best not to interrupt yourself. Otherwise, go for a walk, grab a coffee, water your office plants, and then come back refreshed.

7. Have fewer meetings

Meetings are necessary for project management, and some of us actually like meetings. Weird, I know. However, having too many meetings can steal time from work on the project itself. And, let's be honest, our meetings far too often go long, get off-topic, and don't result in the answers we were hoping for.

Before scheduling or accepting a meeting, ask yourself whether its goals could be accomplished with an email or phone call, and do your best to avoid unnecessary meetings.

Session 4: Effective Time Management

I- About Time Management

- Time management is defined as the time spent and the progress made over the project.
- It is one of the major components of project management and the most concern of project managers.
- Time management helps you schedule and examine the completion of the project.

II- Mastering Time Management

- Managing time is an important part of task management
- It helps to break down projects, assign tasks, and complete the projects on time

A- The 3 Strategies

- Project time management processes
- Implementing time management best practices
- Using the right time management tools

B- The Six Main Processes

- Creating a project plan
- Project schedule management process
- Define the project activities
- Determine dependencies
- Sequence activities
- Estimate durations and resources

C- Effective Practices

- Create task lists
- Prioritize
- Avoid distractions
- Delegate
- Identify bottlenecks

D- The 10 Effective Steps

- Figure out how you're spending your time.
- Create a daily schedule—and stick with it
- Prioritize wisely.
- Group similar tasks together.
- Avoid the urge to multitask.
- Assign time limits to tasks.
- Build in buffers.
- Learn to say no.
- Get organized.
- Eliminate distractions.

1. How to spend time

- Determine how much you can feasibly accomplish in a day
- Identify timesucks
- Focus on activities that provide the greatest returns

2. Create a daily schedule

- Create a list of the most pressing tasks for the next day

3. Prioritize wisely

- Start by eliminating tasks that you shouldn't be performing
- Identify the three or four most important tasks and do those first

	Urgent	Not urgent
Important	Do <ul style="list-style-type: none">• Come up with Q1 goals• Finish first draft of pitches• Hire sales	Decide <ul style="list-style-type: none">• Hold weekly team meeting• Take new hire to lunch• Set up call with client• Go to the gym• Sign up for event as volunteer
Not important	Delegate <ul style="list-style-type: none">• Organize and schedule team activity• Document and analyze current team process to find and eliminate inefficiencies• Meeting with product manager• Review blog posts	Delete <ul style="list-style-type: none">• Keep running list of tasks on Post-its on desk• Hold daily team meeting• Check personal Instagram

4. Group similar tasks together

- Save yourself time and mental energy by trying to complete all of one type of to-do before moving on to the next

5. Avoid the urge to multitask

- Focus on the task at hand and block out all distractions

6. Assign time limits to tasks

- To-do lists are great and wonderful

7. Build in buffers

- Regular breaks increase productivity, mental well-being, decision making, and memory

8. Learn to say no

- You truly know what you have time for, so if you need to decline a request in order to focus on more important tasks

9. Get organized

- Little things make a big difference. Create a filing system for documents

10. Eliminate distractions

- Social media
- Web browsing
- Co-workers
- Text messages
- Instant messaging
- Etc.

Topic 2

Plan, Priority & Productivity

Session 4: Effective Time Management

I- About Time Management

Time management is defined as the time spent and the progress made over the project. It is one of the major components of project management and the most concern of project managers. Time management helps you schedule and examine the completion of the project.

II- Mastering Time Management

Managing time is an important part of task management. It helps to break down projects, assign tasks, and complete the projects on time. Fortunately, with a bit of effort, you can implement project management strategies that not only make you more efficient but might actually make your working life more enjoyable.

A- The 3 strategies

- Project time management processes
- Implementing time management best practices
- Using the right time management tools

There is some overlap among these categories, so don't think of them as steps that must be taken in a particular order. Instead, think about the needs of your project team and the broader organization, and then start by implementing the strategies that seem most likely to make an impact.

B- The Six Main Processes

1. Creating a project plan

Planning is a crucial part of project management. As a project manager, it's your responsibility to make a project plan. A project plan, according to the PMI, is "the document that describes how the project will be executed, monitored and controlled, and closed."

It outlines the objectives and scope of your project and serves as an official point of reference for the project team, the larger company, and the project stakeholders. Just by creating a thorough plan, you'll save yourself and your team a great deal of time and frustration as the project progresses.

2. Project schedule management process

A project schedule is much more than a basic calendar. It details the project

timeline and the organizational resources required to complete each task. The project schedule must be accessible to every team member. Its purpose is to communicate critical information to the team, so it must be comprehensive and easy to understand.

Several of the steps in creating a project schedule relate directly to time management, and as they are dependent on one another. With the help of the best project scheduling tools, we can create a seamless scheduling process.

3. Define the project activities

This can be as simple as creating a list of tasks that must be completed in order to deliver your project. In the case of complex projects, it may be helpful to organize these tasks in the form of a WBS, a project management chart that helps to visualize projects, and their sub-tasks.

4. Determine dependencies

Once you have all the project activities listed, think through each one carefully to identify which tasks rely on others to be completed. If you're building a house, for example, you can't put the roof on until the frame is completed. It's important to correctly define all your project dependencies so you can schedule accurately and avoid delays.

5. Sequence activities

After you've established the dependencies among your activities, you can sequence them. At this point, you aren't assigning any time to your activities in terms of work hours or due dates. Instead, you're focusing on the order in which all project activities should be done so that the most efficient flow is created.

6. Estimate durations and resources

The best way to estimate duration is to use data from similar previous jobs. If you don't have any data to work from and there's no industry standard to which you can refer, an estimate based on the average of the best, worst, and most likely scenarios. Estimate the resources needed for each project activity.

Remember that resource allocation will affect your schedule; if the same team member is responsible for multiple tasks, they can't be completed at the same time, which affects your schedule.

C- Effective time management practices

1. Create task lists

Separate from your project task list (though that's important), create task lists for yourself, and encourage your team to do the same. It's best to make a task list for a limited amount of time, even as short as a day.

2. Prioritize

Ivy Lee was an American publicity expert, but the method that bears his name has to do with productivity. His five-step approach to getting more done is extremely simple, but don't discount it. It's been helping people cross items off to-do lists for over a hundred years.

At the end of your workday, write down the six – and only six – most important tasks you need to accomplish the following day.

Rank the tasks in order of importance.

When you begin work the next morning, give your full attention to the #1 task. Work on that task until it's completed before moving to task #2.

Do the same for task #2 and so on down the list. If you're interrupted by a true emergency, get back to your task as quickly as possible.

At the end of the day, make your list of six priorities for the following workday, carrying over any remaining items

3. Avoid distractions

As mentioned above, focus is important for getting things done and managing your time well. Set aside time for concentrated work on your tasks. You can even make appointments in your calendar so your team can see you're busy. There are google project management tools that are integrated with calendars.

4. Delegate

If you never have enough time to finish your task list, see what you can delegate tasks to other members of your team. Being a good project manager doesn't mean that you do all the work yourself. It means making sure the work gets done and done well, no matter by whom.

5. Identify bottlenecks

If you find your team is consistently behind schedule, examine your workflow to see where the bottlenecks are. A common reason is when certain team members are overloaded.

D- The 10 Effective Steps

We've all experienced the woes of time management at work. You wake up hopeful and optimistic—not only will you meet all your deadlines, but you'll hit the gym and make a healthy home-cooked meal, too.

Then life happens. You leave late, you hit traffic, and you arrive at your desk already frustrated with the world. Sitting down to finally knock out that project you've been procrastinating for weeks, you realize you've got back-to-back meetings until noon—and yes, you're already late for the first one. You finally walk out of the last meeting, and you start wading through emails when you get pulled into a meeting with the VP. He has a last-minute request for you. "It should only take an hour," he says. Try three.

The good news is that there are ways to reclaim those seemingly elusive lost hours of the day. It's all about personal time management—manage your time instead of letting it manage you. We've got ten time management tips for work to get you started

1. Figure out how you're currently spending your time.

To optimize your personal time management, you first need to figure out where the time is going. Try diligently logging your time for a week by tracking your daily activities. This audit will help you:

- Determine how much you can feasibly accomplish in a day.
- Identify timesucks.
- Focus on activities that provide the greatest returns.

As you conduct this time audit, it will become pretty clear how much of your time is spent on unproductive thoughts, conversations, and activities.

You'll gain a more accurate sense for how long certain types of tasks take you (which will be very helpful for executing on a later tip). This exercise can also help you determine the time of day when you are most productive—that way, you know when to work on your projects requiring the most focus and creativity. Pro Tip: Assess how realistically you estimate your time. At the end of your audit, compare how much time certain tasks or projects took you to complete versus how long you expected them to take. We often overestimate how quickly can accomplish things. If there is a significant difference, take that into account as you plan out your schedule going forward so you can more accurately budget your time and avoid bottlenecks and missed deadlines.

2. Create a daily schedule—and stick with it

This step is absolutely crucial for learning how to manage time at work. Don't even attempt starting your day without an organized to-do list. Before you leave work for the day, create a list of the most pressing tasks for the next day. This step allows you to get going as soon as you get to the office.

Putting everything on paper will prevent you from lying awake at night tossing and turning over the tasks running through your brain. Instead, your subconscious goes to work on your plans while you are asleep, which means you can wake up in the morning with new insights for the workday.

If you can't do it the day before, make sure you write out your list first thing in the morning. You'll find that the time you spend creating a clear plan is nothing compared to the time you'll lose jumping between tasks when you lack such a plan.

3. Prioritize wisely.

As you organize your to-do list, prioritization is key for successful time management at work. Start by eliminating tasks that you shouldn't be performing in the first place. Then identify the three or four most important tasks and do those first—that way, you make sure you finish the essentials.

Evaluate your to-do list and make sure you organized it based on the importance of a task rather than its urgency. Important responsibilities support the achievement of your goals, whereas urgent responsibilities require immediate attention and are associated with the achievement of someone else's goals. We tend to let the urgent dominate when we should really focus on activities that support our business goals.

To avoid this pitfall, use one of the time management tips for work found in Stephen Covey's book *First Things First*. He offers the following time management matrix, known as the Eisenhower matrix, as an organizational tool for prioritizing tasks based on these ideas of importance and urgency.

Here's a closer look at each of these quadrants:

Important and urgent: These tasks have important deadlines with high urgency—complete them right away.

Important but not urgent: These items are important but don't require immediate action and should involve long-term development strategizing. Strive to spend most of your time in this quadrant.

Urgent but not important: These tasks are urgent but not important. Minimize, delegate, or eliminate them because they don't contribute to your output. They are generally distractions that may result from the poor planning of others.

Not urgent and not important: These activities hold little if any value and should be eliminated as much as possible.

Here's a look at what sorts of activities fall in each quadrant. Try creating your own time management matrix and inserting items from your to-do list and day-to-day activities to evaluate how you are currently spending your time. You can create one in Lucidchart in less than a minute—that's what we did!

When you can figure out prioritization, your personal time management can reach a whole new level. You will know where to focus your time during those days when there simply aren't enough hours.

4. Group similar tasks together.

Save yourself time and mental energy by trying to complete all of one type of to-do before moving on to the next. For example, create separate chunks of time for answering emails, making phone calls, filing, etc. Don't answer emails and messages as they come in, as doing so is distraction at its finest. Turn off your phone and email notifications to completely eliminate the temptation to check at an un-appointed time.

5. Avoid the urge to multitask.

This is one of the simplest time management tips for work, yet it can be one of the hardest to follow. Focus on the task at hand and block out all distractions. It can be tempting to multitask, but you're just shooting yourself in the foot when you attempt to do so. You lose time and decrease productivity when switching from one task to another.

Similarly, don't get overwhelmed by a to-do list stretching a mile long. Stressing over it will not make it shorter, so breathe in, breathe out, and take it one task at a time.

6. Assign time limits to tasks.

Part of creating your schedule should involve setting time limits on tasks instead of just working until they're done. To-do lists are great and wonderful, but sometimes you might feel like you never check anything off.

If you're looking to set a steady pace to your workflow, the Pomodoro Technique can help you check off your to-do list in 25-minute chunks, taking short breaks between each stint and a longer break after completing four. This technique balances a narrow focus with frequent breaks, reducing mental strain and maintaining motivation.

If you'd rather set your own pace, timeboxing allows you to block out varied amounts of time. Use your time log (step #1) to get an estimate for how long an activity will take you. Once you've spent the designated amount of time on that task, move on to the next important activity. You'll find your productivity skyrocketing and your to-do list shrinking when you have these parameters in place.

7. Build in buffers.

It may sound counterintuitive, but breaks are essential to better time management. Research shows that regular breaks increase productivity, mental well-being, decision making, and memory. And skipping breaks can lead to faster burnout and more stress.

So what does this have to do with time management?

Higher stress levels impact energy, fatigue, cognition, and productivity and engagement at work. So ironically, working less (by taking more breaks), can help you do more in less time.

Make breaks a part of your schedule. When you finish a task, give yourself time to breathe. Take mini breaks to recharge, whether that be a short walk, a game of ping pong, some meditation, etc.

8. Learn to say no.

You'll never learn how to manage time at work if you don't learn how to say no. Only you truly know what you have time for, so if you need to decline a request in order to focus on more important tasks, don't hesitate to do so. And if you take on a project that is obviously going nowhere, don't be afraid to let it go. Rather than doing a lot of tasks that yield little or no value, complete fewer tasks that create more value. Remember the 80/20 rule—80% of your output comes from 20% of your inputs. Focus your efforts accordingly.

If you can't say no, delegate it. While delegating can be a hard skill to learn, it can work wonders for your personal time management. You've put together a talented team, so determine the tasks you can pass on.

9. Get organized.

For effective time management, this tip needs to actually go on your to-do list. If you have piles of papers scattered all over your desk, finding the one you actually need will be like finding a needle in a haystack. There are few things as frustrating as wasting valuable time looking for misplaced items. Not to mention how hard clutter can make it to focus.

Little things make a big difference. Create a filing system for documents. Unsubscribe to emails you no longer need. Automate repetitive tasks or processes where you can. Create systems for organizing and accomplishing tasks to increase your efficiency. Just think—you only have to do it once, but you get the benefits forever.

10. Eliminate distractions.

Social media, web browsing, co-workers, text messages, instant messaging—the distractions at work can be limitless. A key to personal time management is being proactive about getting rid of them. Shut your door to limit interruptions. Close all tabs except the ones you are currently working on. Turn off messaging notifications and leave your personal phone calls for lunch.

Take baby steps. Identify your top two distractions and focus on conquering those for two weeks. And remember that getting enough sleep, drinking enough water, and eating healthily can all help you stay focused during the workday—especially when that afternoon slump hits.

Better time management is about skills not hacks

At the end of the day, no “pro-tip” or calendar tool will magically make your time management woes disappear if you don't have a foundation of good time management skills.

The Harvard Business Review identifies three primary skills that separate time management success from failure:

Awareness: thinking realistically about your time by understanding it is a limited resource.

Arrangement: organizing goals, plans, schedules, and tasks to most effectively use your time.

Adaptation: regularly monitoring how you use your time while performing activities, including adjusting to interruptions or changing priorities.

Use the tips above to help you develop these skills and create effective time management habits that stick.

TOPIC 3: QUALITY ASSURANCE



Session 1: Introduction to Quality Assurance

What is Quality?

- Quality is extremely hard to define, and it is simply stated: “Fit for use or purpose.”
- It is all about meeting the needs and expectations of customers with respect to functionality, design, reliability, durability, & price of the product.

What is Assurance?

- Assurance is nothing but a positive declaration on a product or service, which gives confidence.
- It is certainty of a product or a service, which it will work well.
- It provides a guarantee that the product will work without any problems as per the expectations or requirements.

What Is Quality Assurance?

- The quality assurance process helps a business ensure its products meet the quality standards set by the company or its industry.
- Another way to understand quality assurance (QA) is as a company's process for improving the quality of its products.

Importance of Quality Assurance

- Quality assurance helps a company create products and services that meet the needs, expectations and requirements of customers.
- It yields high-quality product offerings that build trust and loyalty with customers.
- The standards and procedures defined by a quality assurance program help prevent product defects before they arise.

Quality Assurance Methodology

- Plan • Do • Check • Act

Quality Assurance Functions

- 1. Technology transfer
- 2. Validation
- 3. Documentation
- 4. Assuring Quality of products
- 5. Quality improvement plans

Example:

- Quality Assurance in Practice

Topic 3

Quality Assurance (QA)

Session 1: Introduction

What is Quality?

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Assurance is nothing but a positive declaration on a product or service, which gives confidence. It is certainty of a product or a service, which it will work well. It provides a guarantee that the product will work without any problems as per the expectations or requirements.

What Is Quality Assurance?

The quality assurance process helps a business ensure its products meet the quality standards set by the company or its industry. Another way to understand quality assurance (QA) is as a company’s process for improving the quality of its products.

Many businesses view their QA program as a promise to internal stakeholders and customers that the company will deliver high-quality products that provide a positive user experience.

What is Quality Assurance (QA)

Quality assurance (QA) is any systematic process of determining whether a product or service meets specified requirements.

QA establishes and maintains set requirements for developing or manufacturing reliable products. A quality assurance system is meant to increase customer confidence and a company’s credibility, while also improving work processes and efficiency, and it enables a company to better compete with others.

The ISO (International Organization for Standardization) is a driving force behind QA practices and mapping the processes used to implement QA. QA is often paired with the ISO 9000 international standard. Many companies use ISO 9000 to ensure that their quality assurance system is in place and effective.

The concept of QA as a formalized practice started in the manufacturing industry,

and it has since spread to most industries, including software development.

Importance of Quality Assurance

Quality assurance helps a company create products and services that meet the needs, expectations and requirements of customers. It yields high-quality product offerings that build trust and loyalty with customers. The standards and procedures defined by a quality assurance program help prevent product defects before they arise.

How to do Quality Assurance: Complete Process

Quality Assurance methodology has a defined cycle called PDCA cycle or Deming cycle. The phases of this cycle are:

- Plan
- Do
- Check
- Act

These above steps are repeated to ensure that processes followed in the organization are evaluated and improved on a periodic basis. Let’s look into the above QA Process steps in detail –

- Plan – Organization should plan and establish the process related objectives and determine the processes that are required to deliver a high-Quality end product.
- Do – Development and testing of Processes and also “do” changes in the processes
- Check – Monitoring of processes, modify the processes, and check whether it meets the predetermined objectives
- Act – A Quality Assurance tester should implement actions that are necessary to achieve improvements in the processes

An organization must use Quality Assurance to ensure that the product is designed and implemented with correct procedures. This helps reduce problems and errors, in the final product.

Quality Assurance Functions:

There are 5 primary Quality Assurance Functions:

1. Technology transfer: This function involves getting a product design document as well as trial and error data and its evaluation. The documents are distributed, checked and approved

2. Validation: Here validation master plan for the entire system is prepared. Approval of test criteria for validating product and process is set. Resource planning for execution of a validation plan is done.
3. Documentation: This function controls the distribution and archiving of documents. Any change in a document is made by adopting the proper change control procedure. Approval of all types of documents.
4. Assuring Quality of products
5. Quality improvement plans

Quality Assurance Certifications:

There are several certifications available in the industry to ensure that Organizations follow Standards Quality Processes. Customers make this as qualifying criteria while selecting a software vendor.

ISO 9000

This standard was first established in 1987, and it is related to Quality Management Systems. This helps the organization ensure quality to their customers and other stakeholders. An organization who wishes to be certified as ISO 9000 is audited based on their functions, products, services and their processes. The main objective is to review and verify whether the organization is following the process as expected and check whether existing processes need improvement.

This certification helps –

- Increase the profit of the organization
- Improves Domestic and International trade
- Reduces waste and increase the productivity of the employees
- Provide Excellent customer satisfaction

What's an Example of Quality Assurance in Practice?

The following hypothetical story illustrates how quality assurance might work in a business.

ABC roofing company has a leak problem

The problem:

A national roofing installer receives an increase in customer complaints about leaks. The common thread is that customers whose roofs were installed within the last six months are experiencing leaks during the first rain.

The source:

The QA team investigates and finds that the company's roof tile supplier changed the composition of its tiles. After speaking with experts, the team realizes the supplier's cheaper components make their tiles more porous.

The solution:

The QA team alerts the executives, who put the pressure the supplier to improve its tile quality or lose the company as a customer. The QA team then writes a new policy requiring a weather test for any new materials added to the company's roof installation process.

Session 2: Quality Control (QC)

Definition

- Quality Control (QC) is a set of activities for ensuring quality starting from Raw material to finish Products.
- The activities focus on identifying defects in the actual products produced or during the production process for corrective measures. Therefore, QC is a reactive approach.
- The main aim of Quality control is to check whether the products meet the specifications and requirements of the customer.
- If an issue or problem is identified, it needs to be fixed before delivery to the customer.



How Is It Done?

- Quality testing is part of every stage of a manufacturing or business process.
- Employees frequently begin testing using samples collected from the production line, finished products, and raw materials.
- Testing during various production phases can help identify the cause of a production problem and the necessary corrective actions to prevent it from happening again.

QC Is Different by Industry

- The kind of business or product greatly impacts the quality control procedures used there.
- To ensure that a consumer won't become ill from a product, for instance, quality control in manufacturing food and medications involves testing samples from the production line for chemicals and bacteria.

Types of Quality Control

- Process Protocol
- Process Control
- Control Charts

Importance of QC

- Quality Control is necessary because it ensures that a company will look at evidence-based data and research to ensure that products are living up to their standard.

Roles and Responsibilities

- A quality control professional is tasked with analyzing these measurements against some sort of standard determined by the quality management department, company policies, and industries or regulatory bodies.
- Based on this evidence-gathering, quality control will recommend changes.

Types of Quality Control

- The four types of quality control are:
 - Process Control
 - Control Charts
 - Acceptance Sampling, and
 - Product Quality Control



Topic 3

Quality Assurance (QA)

Session 2: Quality Control (QC)

In today's world, it's not uncommon that we take the reliability and quality of products and services for granted. At the start of the 20th century, however, quality control in manufacturing was not exactly a reliable process.

Now, decades after early pioneers created business problem-solving processes and analysis frameworks to determine and control consistency and value, it's possible more than ever for a business to implement and scale best practices.

Quality does not have a singular definition. Despite the relative meaning of "value," quality control is the process by which products/services are tested and measured to ensure they meet a standard. Through this process, a business can evaluate, maintain, and improve product quality.

Ultimately, there are two crucial goals of quality control: (1) to ensure that products are as uniform as possible and (2), to minimize errors and inconsistencies within them.

Definition

Quality Control (QC) is a set of activities for ensuring quality starting from Raw material to finish Products. The activities focus on identifying defects in the actual products produced or during the production process for corrective measures. Therefore, QC is a reactive approach.

Quality Control is product-oriented and mainly focuses on quality defect identification and taking corrective measures using 7 QC Tools and 8D problem-solving methodology.

The main aim of Quality control is to check whether the products meet the specifications and requirements of the customer. If an issue or problem is identified, it needs to be fixed before delivery to the customer.

QC also evaluates people on their quality level skill sets and imparts training and certifications. This evaluation is required for the service based organization and helps provide "perfect" service to the customers.
QC is a part of Quality Assurance.

How Is It Done?

Normally, quality testing is part of every stage of a manufacturing or business process. Employees frequently begin testing using samples collected from the production line, finished products, and raw materials. Testing during various production phases can help identify the cause of a production problem and the necessary corrective actions to prevent it from happening again.

Customer service reviews, questionnaires, surveys, inspections, and audits are a few examples of quality testing procedures that can be used in non-manufacturing businesses. A company can use any procedure or technique to ensure that the final product or service is safe, compliant, and meets consumer demands.

QC Is Different by Industry

The kind of business or product greatly impacts the quality control procedures used there. To ensure that a consumer won't become ill from a product, for instance, quality control in manufacturing food and medications involves testing samples from the production line for chemicals and bacteria.

Types of Quality Control

Just as quality is a relative word with many interpretations, quality control itself doesn't have a uniform, universal process. Some methods depend on the industry. Take food and drug products, for instance, where errors can put people at risk and create significant liability. These industries may rely more heavily on scientific measures, whereas others (such as education or coaching) may require a more holistic, qualitative method.

At its core, quality control requires attention to detail and research methodology.

So, what is quality control? There are a wide range of quality control methods, including:

Control Charts:

A graph or chart is used to study how processes are changing over time. Using statistics, the business and manufacturing processes are analyzed for being "in control."

Process Control:

Processes are monitored and adjusted to ensure quality and improve performance. This is typically a technical process using feedback loops, industrial-level controls, and chemical processes to achieve consistency.

Acceptance Sampling:

A statistical measure is used to determine if a batch or sample of products meets the overall manufacturing standard.

Process Protocol:

A mapping methodology that improves the design and implementation processes by creating evaluative indicators for each step.

There are other quality control factors to consider when selecting a method in addition to types of processes.

Some companies establish internal quality control divisions when defining what is quality control. They do this to monitor products and services, while others rely on external bodies to track products and performance. These controls may be largely dependent on the industry of the business. Due to the strict nature of food inspections, for example, it may be in a company's best interest to sample products internally and verify these results in a third-party lab.

Why Is Quality Control Important? What Are the Benefits?

In the long run, investments in quality control measures can protect the reputation of a company, prevent products from being unreliable, and increase trust on the side of consumers. These processes are determined through rigorous methodology and testing, as well as industry standards and best practices.

Moreover, quality control is necessary because it ensures that a company will look at evidence-based data and research — not just anecdotal observations — to ensure that products are living up to their standard. One essential aspect of quality control is that the process doesn't just happen once but is a routine evaluation of the product to ensure that it's continuously meeting both the manufacturing standards and consumer demand.

No consumer wants to risk using a product that could endanger them or fail expectations. A company's reputation, reliability, and efficiency are all at risk if quality control is overlooked. A product's testing can play a role in marketing and sales as well since consumers may trust it more.

Quality Control Roles and Responsibilities

When answering what is quality control, it is critical to understand that it consists

of multifaceted responsibilities and roles. Moreover, it shouldn't be confused with quality assurance. Whereas quality assurance looks at the processes used to prevent defects, quality control is focused specifically on the measurement and analysis processes involved with determining product quality.

Quality control uses specific research tools to accomplish fact-finding processes and conduct analyses. A quality control professional is tasked with analyzing these measurements against some sort of standard determined by the quality management department, company policies, and industries or regulatory bodies. Based on this evidence-gathering, quality control will recommend changes.

We can see from this roadmap, too, how quality assurance and quality control differ. Quality assurance looks at the holistic picture to prevent a product from becoming defective. Quality control, on the other hand, later determines if a product is, in fact, defective or not. Both roles fit under the broad umbrella of quality management.

Thus, an individual in quality control is tasked with communicating results to stakeholders and significant parties. A good quality control specialist will be able to disseminate scientific and research-based thinking to a business community and assist with the problem-solving process. These specialists are a key component of a product's design process, as they determine whether a company's creation is truly acceptable for the market.

What are the four types of Quality Control?

The four types of quality control are process control, control charts, acceptance sampling, and product quality control.

Session 3: Difference between QA & QC

Definition

- Quality Assurance can be defined as «part of quality management focused on providing confidence that quality requirements will be fulfilled.»
- Quality Control can be defined as «part of quality management focused on fulfilling quality requirements.»

History

• 1920s: Quality Control

- Following the Industrial Revolution and the rise of mass production, it became important to better define and control the quality of products.

• 1950s: Quality Assurance and Auditing

- The quality profession expanded to include the quality assurance and quality audit functions.
- The drivers of independent verification of quality were primarily industries in which public health and safety were paramount.

Activities

• Quality Assurance

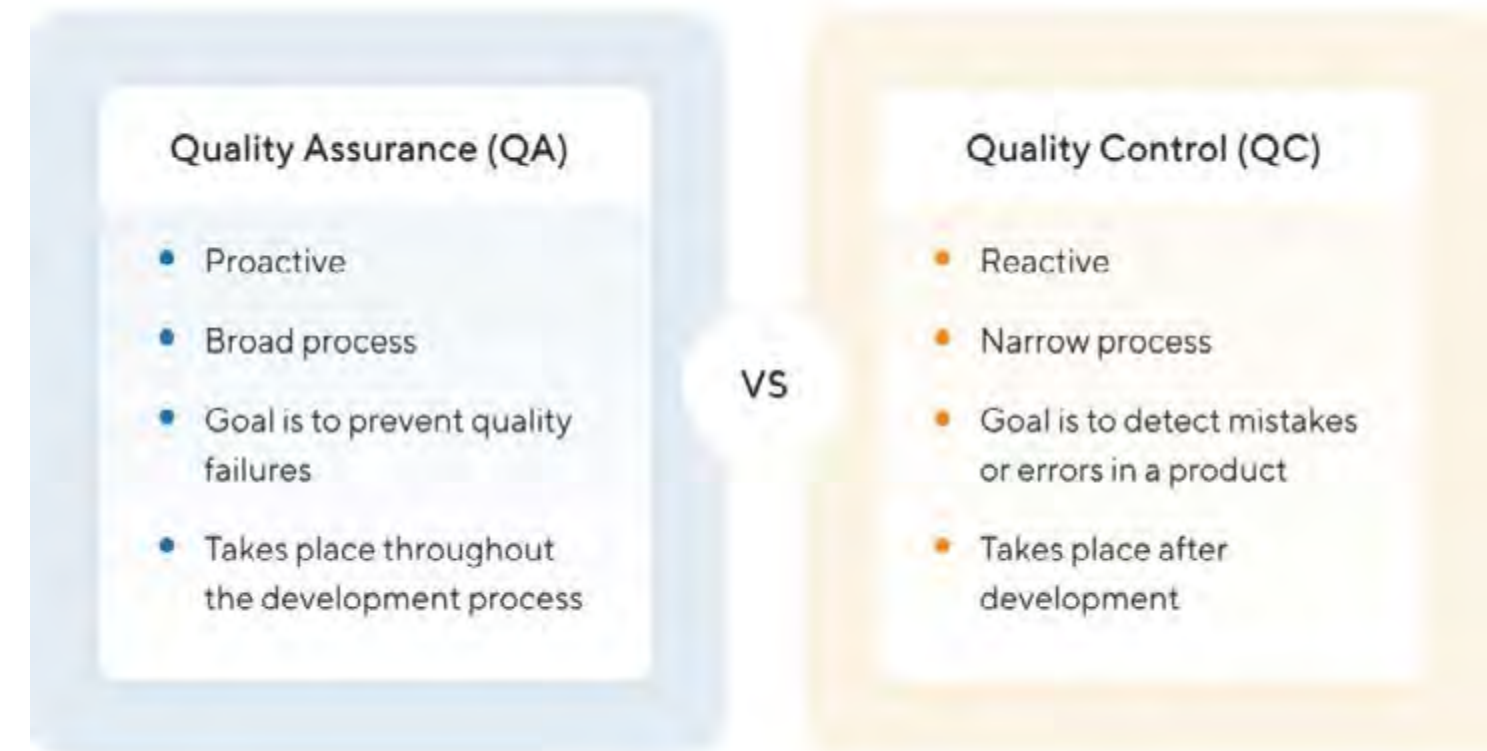
- Quality Audit
- Defining Process
- Tool Identification and selection
- Training of Quality Standards and Processes

• Quality Control

- Walkthrough
- Testing
- Inspection
- Checkpoint review

The 5 Main Differences

- 1. Proactive (QA) vs. Reactive (QC)
- 2. Process (QA) vs. Product (QC)
- 3. System (QA) vs. Parts (QC)
- 4. Creation (QA) vs. Verification (QC)
- 5. Entire Team (QA) vs. Dedicated Personnel (QC)



Industry Perspectives

• QA, QC, and Inspection

Inspection is the process of measuring, examining, and testing to gauge one or more characteristics of a product or service and the comparison of these with specified requirements to determine conformity.

• Quality Assurance and Audit Functions

- Auditing is part of the quality assurance function.
- It is important to ensure quality because it is used to compare actual conditions with requirements and to report those results to management.



Topic 3

Quality Assurance (QA)

Session 3: Difference between (QA) & (QC)

Quality assurance and quality control are two aspects of quality management. While some quality assurance and quality control activities are interrelated, the two are defined differently. Typically, QA activities and responsibilities cover virtually all of the quality system in one fashion or another, while QC is a subset of the QA activities. Also, elements in the quality system might not be specifically covered by QA/QC activities and responsibilities but may involve QA and QC.

Quality Assurance

Quality assurance can be defined as “part of quality management focused on providing confidence that quality requirements will be fulfilled.” The confidence provided by quality assurance is twofold—internally to management and externally to customers, government agencies, regulators, certifiers, and third parties. An alternate definition is “all the planned and systematic activities implemented within the quality system that can be demonstrated to provide confidence that a product or service will fulfill requirements for quality.”

Quality Control

Quality control can be defined as “part of quality management focused on fulfilling quality requirements.” While quality assurance relates to how a process is performed or how a product is made, quality control is more the inspection aspect of quality management. An alternate definition is “the operational techniques and activities used to fulfill requirements for quality.”

History

Quality has been defined as fitness for use, conformance to requirements, and the pursuit of excellence. Even though the concept of quality has existed from early times, the study and definition of quality have been given prominence only in the last century.

1920s: Quality Control

Following the Industrial Revolution and the rise of mass production, it became important to better define and control the quality of products. Originally, the goal of quality was to ensure that engineering requirements were met in final products. Later, as manufacturing processes became more complex, quality developed into a discipline for controlling process variation as a means of producing quality products.

1950s: Quality Assurance and Auditing

The quality profession expanded to include the quality assurance and quality audit functions. The drivers of independent verification of quality were primarily industries in which public health and safety were paramount.

Activities

Sometimes, QC is confused with the QA. Quality control is to examine the product or service and check for the result. Quality Assurance in Software Engineering is to examine the processes and make changes to the processes which led to the end-product.

Quality Assurance Activities

Quality Audit
Defining Process
Tool Identification and selection
Training of Quality Standards and Processes

Quality Control Activities

Walkthrough
Testing
Inspection
Checkpoint review

The 5 Main Differences

To further understand the differences between quality assurance and quality control, you need to get a picture of how the two processes work together to boost your organization’s quality improvement and help reduce corrective actions.

1. Proactive (QA) vs. Reactive (QC)

Effective quality assurance is proactive. It aims to prevent defects before they occur through process design. QC is reactive and exists to identify defects in the quality of products after they have happened.

QA involves the design of processes, such as documenting standard operating procedures (SOPs) according to ISO 9000 standards. A safe, effective product should be the result every time processes are followed. QC involves the testing of products to ensure they meet standards for safety and efficacy. If QC testing uncovers quality issues, it should result in reactive steps to prevent an unsafe product from being shipped and distributed.

Ideally, QC issues should also spark a QA review. Non-conforming test results should result in corrective and preventive action (CAPA) investigation to determine the root cause of quality issues and update processes to prevent the problem from happening in the future.

2. Process (QA) vs. Product (QC)

QA is process-oriented, and it focuses on preventing quality issues. QC is product-oriented and focused on identifying quality issues in manufactured products that could affect customer satisfaction. Another way to understand this distinction is actions vs. results. QA involves the actions which create the product, while QC is focused on the resulting product. Several examples of each type of activity are detailed below.

QA Processes:

- Documentation
- Audits
- Supplier management
- Personnel training
- Change control
- Investigation procedures

QC Procedures:

- Batch inspection
- Product sampling
- Validation testing
- Laboratory testing
- Software testing

3. System (QA) vs. Parts (QC)

Quality assurance control systems are the methods and procedures which are used to safeguard quality standards. Quality control systems measure parts, including the outputs of the system.

QC efforts may also be focused on parts used to create the final product, such as raw materials from a supplier. The QA system for quality management may dictate various activities to make sure inputs are consistently safe and effective, such as auditing suppliers and batch sampling raw materials.

4. Creation (QA) vs. Verification (QC)

The result of QA activities is a roadmap for creating high-quality products.

It involves defining standards for product design, manufacture, packaging, distribution, marketing, and sales.

QC involves verification of products post-manufacture and before distribution, or confirming safety and efficacy.

5. Entire Team (QA) vs. Dedicated Personnel (QC)

Quality assurance activities involve the entire team. Every member of a life sciences organization is responsible for QA activities by following SOPs. While the quality management system (QMS) is generally the responsibility of the quality unit and the leadership team, QA activities involve standards for training, documentation, and review across the workforce.

QC is generally the responsibility of certain personnel within the organization whose duties include following SOPs for product testing. QC staff follow SOPs for quality control and document their findings based on standardized procedures for product testing and process validation.

The Role of an eQMS in Quality Assurance and Quality Control

Neither QA or QC are optional. Similarly, it's impossible to say whether QA or QC is more valuable. QA involves creating standards and processes to create a safe, effective process. QC activities validate the product.

Life sciences organizations should “close the loop” on quality management processes by using QC to inform QA. When non-conformances are discovered, it's important to launch an investigation to determine where the breakdown occurred in QA processes and create stronger standards.

QC and QA are better together, and they're best when both are incorporated into an enterprise quality management system (eQMS) for end-to-end quality processes. A single, cloud-based QMS for life sciences can integrate processes for assuring and controlling quality through document control and training, CAPA management and complaint handling throughout the product life cycle.

Qualio's eQMS is built specifically for startup and scale-up life sciences companies. If your company needs a scalable, simple QMS platform, we'd love to show you what Qualio can do for Quality Assurance and Quality Control with a personalized demo.

Industry Perspectives

For some service organizations, the concept of quality control may be foreign because there is no tangible product to inspect and control. The quality assurance function in a service organization may not include quality control of the service but may include quality control of any products involved in providing the service.

A service may include products that are documents (such as a report, contract, or design) or tangible products (such as a rental car or units of blood). It may be necessary to control product quality in a service organization to ensure that the service meets customer requirements.

QA, QC, and Inspection

Inspection is the process of measuring, examining, and testing to gauge one or more characteristics of a product or service and the comparison of these with specified requirements to determine conformity. Products, processes, and various other results can be inspected to make sure that the object coming off a production line, or the service being provided, is correct and meets specifications.

Quality Assurance and Audit Functions

Auditing is part of the quality assurance function. It is important to ensure quality because it is used to compare actual conditions with requirements and to report those results to management.

In *The Quality Audit: A Management Evaluation Tool* (McGraw-Hill, 1988), Charles Mill wrote that auditing and inspection are not interchangeable: “The auditor may use inspection techniques as an evaluation tool, but the audit should not be involved in carrying out any verification activities leading to the actual acceptance or rejection of a product or service. An audit should be involved with the evaluation of the process and controls covering the production and verification activities.”

Formal management systems have evolved to direct and control organizations. There are quality management systems (QMSs) as well as environmental or other management systems, and each of these systems may be audited.

Session 4: The ISO Standards Assurance

Definition

«A standard is an agreed way of doing something. It could be about making a product, managing a process, delivering a service or supplying materials – standards can cover a huge range of activities undertaken by organizations and used by their customers.»

Developing Standards

- It takes a lot of people working together to develop a standard.
- The voting process is the key to consensus.
- They begin the process with the development of a draft that meets a market need within a specific area.
- This is then shared for commenting and further discussion.

What is ISO?

- The quality assurance process helps a business ensure its products meet the quality standards set by the company or its industry.
- Another way to understand quality assurance (QA) is as a company's process for improving the quality of its products.

Importance of Quality Assurance

- ISO is the International Organization for Standardization, with a current membership of 165 countries or national standards bodies.
- It is the world's leading authority and regulatory body for safety and quality standards in manufacturing and service.

What are ISO Standards?

- ISO standards are specific criteria set by ISO to cover different aspects of business and manufacturing operations.
- To earn a coveted ISO standard certification, a company has to request and pass a third-party ISO audit performed by a national or regional certification body.

Common ISO Standards

- ISO boasts almost 22,000 standards and certifications:
 - ISO 9001:2015 – Quality Management Standard
 - ISO 22000 – Food Safety Standard
 - ISO 27001 – Information Security Standard
 - ISO 31000 – Risk Management Standard
 - ISO 45001:2018 – Workplace Safety Standard

Topic 3

Quality Assurance (QA)

Session 4: The ISO Standards

What is a Standard?

In essence, a standard is an agreed way of doing something. It could be about making a product, managing a process, delivering a service or supplying materials – standards can cover a huge range of activities undertaken by organizations and used by their customers.

Standards are the distilled wisdom of people with expertise in their subject matter and who know the needs of the organizations they represent – people such as manufacturers, sellers, buyers, customers, trade associations, users or regulators.

Our portfolio extends to more than 30,000 current standards. They are designed for voluntary use so it's up to you – you're not forced to follow a set of rules that make life harder for you, you're offered ways to do your work better.

Standards are knowledge. They are powerful tools that can help drive innovation and increase productivity. They can make organizations more successful and people's everyday lives easier, safer and healthier.

Developing Standards

Like a symphony, it takes a lot of people working together to develop a standard. ISO's role is similar to that of a conductor, while the orchestra is made up of independent technical experts nominated by our members.

They begin the process with the development of a draft that meets a market need within a specific area. This is then shared for commenting and further discussion.

The voting process is the key to consensus. If that's achieved then the draft is on its way to becoming an ISO standard. If agreement isn't reached then the draft will be modified further, and voted on again.

From first proposal to final publication, developing a standard usually takes about 3 years.

What is ISO and Why is it Important?

Quality has been defined as fitness for use, conformance to requirements, and the pursuit of excellence. Even though the concept of quality has existed from ISO is the International Organization for Standardization, with a current membership of 165 countries or national standards bodies. It is the world's leading authority and regulatory body for safety and quality standards in manufacturing and service.

Activities

ISO standards are specific criteria set by ISO to cover different aspects of business and manufacturing operations. To earn a coveted ISO standard certification, a company has to request and pass a third-party ISO audit performed by a national or regional certification body.

Aside from boosting your company's trustworthiness in the eyes of clients and consumers, having an ISO standard certification also gives you an advantage over your competitors who have not yet acquired theirs.

Common ISO Standards

To date, ISO boasts almost 22,000 standards and certifications covering a wide variety of operational aspects. Below are some of the most common standards companies strive for:

ISO 9001:2015 – Quality Management Standard

Last updated in 2015, ISO 9001:2015 specifies the requirements for a company's QMS (Quality Management System). It aims to assess an operation's ability to consistently deliver high-quality products and services while meeting customer expectations and relevant statutory and regulatory requirements.

ISO 22000 – Food Safety Standard

ISO 22000 provides requirements for developing and implementing a Food Safety Management System (FSMS). This certification is a must-have for companies in the food processing and food service industries.

ISO 27001 – Information Security Standard

Another popular ISO standard, ISO 27001 is concerned with a company's ability to implement an effective Information Security Management System (ISMS) in order to keep confidential business information safe from unauthorized access.

ISO 31000 – Risk Management Standard

The ISO 31000 certification sets the standard for frameworking, designing, implementing, and maintaining a risk management system on a company-wide level.

ISO 45001:2018 – Workplace Safety Standard

Last updated in 2018, ISO 45001 sets the international standard for Occupational Health & Safety (OH&S) Management Systems. Failure to comply can lead to incidents, cost overruns, and even lawsuits.

TOPIC 4: MARKETING PLAN



Session 1: Introduction to Marketing

Definition 1

“Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, services, organizations, and events (people, places) to create and maintain relationships that will satisfy individual and organizational objectives.»

Definition 2

“Marketing is the business activity of presenting products or services to potential customers in such a way as to make them eager to buy. Marketing includes such matters as the pricing and packaging of the product and the creation of demand by advertising and sales campaigns.”

Definition 3

“Marketing is a function that works to persuade customers to behave in a way that improves a product's performance.”

Definition 4

“Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.”

Definition 5

“Marketing is the total system of business activities designed to plan, price, promote, and distribute want-satisfying products to target markets to achieve organizational objectives.” (The Marketing Mix)



I- The History of Marketing

- Phase 1900-1450 :1: Printed Advertising
- Phase 1949-1920 :2: New Media
- Phase 1972-1950 :3: Marketing is Born
- Phase 1994-1973 :4: The Digital Era
- Phase 2020-1995 :5: The Era of Social Media

II- Purpose of Marketing

- Marketing is the process of getting people interested in your company's product or service.
- This happens through market research, analysis, and understanding your ideal customer's interests.
- Marketing pertains to all aspects of a business, including product development, distribution methods, sales, and advertising.

III- The 10 Marketing Objectives

- 1. Increase brand awareness among the target audience
- 2. Increase market share
- 3. Launching a new product
- 4. Improve Return on Investment (ROI)
- 5. Introduce the company into new international or local markets
- 6. Increase business profits
- 7. Optimize the conversion funnel
- 8. Capture new leads
- 9. Customer loyalty
- 10. Increase sales

IV- Marketing Benefits

- 1. Raising Brand Awareness
- 2. Generating Traffic
- 3. Increasing Revenue
- 4. Building Trust in Your Brand
- 5. Tracking Your Metrics

V- The 4 Ps of Marketing

- Product ● Price ● Place ● Promotion

Topic 4

Marketing Plan

Session 1: Introduction to Marketing

A Group is not a Team

One of the most challenging tasks facing a supervisor is how to take the group of employees that work for them and mold them into a team. Too often in businesses, we are confronted with cliques, separation, and division. It is often an uphill battle for a supervisor to get all employees involved in the work of the organization. Teams, or a sense of teamwork, isn't created by forcing a group of people to meet weekly in the same room. It is created by an increased sense of community that comes from shared objectives. Employees need to have a reason in common to work together as a team. So how do you get everyone on board? What is it that prevents people who work together from becoming a cohesive unit?

7 Practices That Turn a Group into a Team

1. Help team members to look at their mission in terms of the organization's survival.

When team members understand their role in the bigger picture, they are more motivated to pull together.

2. Set short-term, medium-term, and long-term goals.

In a cross-functional team, we would be talking about the action plan associated with achieving the team's mission. If the team is made up of staff, then you want to involve them in writing the group's mission and setting strategic and tactical plans for achieving that mission. As they better understand the part they can play in the survival and success of their organization, they will work harder together to make the plans a reality.

3. Shared responsibility.

Teamwork develops from shared responsibility not only in doing the work but in making decisions about how that work should be done.

4. Have team members support each other.

Whatever the group, organize the work to make the most of each employee's contribution to the team, bringing employees together whenever appropriate to help one another. As employees learn to rely on each other for help, a more collaborative environment will arise.

5. Have team members keep each other apprised of their work.

In project teams, you can have members review the efforts they have completed toward achievement of the team's mission. In the case of staff members, regular department meetings give you an opportunity to have employees share with one another their accomplishments.

6. Don't forget the package.

There's no substitute for some genuine team spirit. Create a brand identity for your team to achieve this. Your team identity could be built around an accomplishment or a skill or reputation that bonds the group together.

7. Don't tolerate gossiping, back-stabbing, or tattle-telling.

When we gossip about other employees, or when we allow it to continue unchecked we are signaling that the team is not important to us. When gossip is not permitted or tolerated, employees work together better. Does it mean no one is talking about one another? No, of course not. It's just not happening at work where all employees easily can be dragged into the fray. Likewise, when we allow employees to tattle to us about what others are doing when we're not there, what can you do about it? It seems the tale is always accompanied by the phrase, "But don't tell them I told you." Tell anyone who wants to tattle there will be no secrets. The same goes for employees who want to backstab another. Tell them they both will be called in for a discussion to air their disagreement. Gossip can turn an environment toxic. If you need to tackle issues with gossip, read our article "Managing Gossip in the Workplace."

Turn Your Group into a True Team

by Linda Hill & Kent Lineback

Are the people who work for you a real team?

It's easy to extol teamwork, but not every group is a team. In fact, most teams we see, aren't — because their managers focus on building the most effective relationships they can with each individual who works for them. They spend their time managing person by person, paying little attention to collective performance. They rarely use their groups to diagnose or solve problems. And when issues arise that clearly affect the group as a whole, they tend to handle them one on one.

In taking this approach, they're overlooking an important management tool: the powerful influence that social dynamics in a real team can exert on the behavior and performance of its members.

What is a team and what makes it potentially such a valuable instrument of leadership?

A team is a group of people who do collective work and are mutually committed to a common team purpose and challenging goals related to that purpose.

Collective work and mutual commitment are the key characteristics. By going beyond mere cooperation and coordination, collective work produces more innovative and productive outcomes that exceed the simple sum of individual efforts. Mutual commitment means members hold themselves and each other jointly accountable for the team's performance. They not only think and act collectively, but the social and emotional bonds among them are compelling. They share a genuine conviction that “we” — the potent concept behind every team — will succeed or fail together, and that no individual can succeed while the team fails.

The powerful ties among members of this social structure spring, first, from purpose and goals. A common, worthwhile purpose creates a sense of doing something important together, and specific, challenging team goals based on that purpose create a sense of going someplace important together. Without purpose and goals, no group will become a team.

But they're not enough. Team members also need clarity; about roles, about how the work is done, and about how members interact. When all of these crucial elements are in place, groups become teams: communities that exert strong influence on members' attitudes and behaviors. That's why the ability to transform a group of people into a true team can make you a more influential and effective manager.

One manager we know who discovered these features of true teams called them a “mystic new power.”

Yet another was happily surprised when he learned how committed people could become to a team and its work once they felt part of it and, through the team, part of something larger than themselves.

These managers came to appreciate the possibilities of managing a group as a whole — that is, creating a team and managing through it. They learned to rely more and more on using team goals and values to stretch performance. They found they could influence individual behavior much more effectively this way. All of us want to do important work, of course, but we're also social creatures who want to fit in and be accepted as part of a team.

No wonder the ability to create and manage a true team is a crucial management skill — the key management skill, some would argue — whether you lead a permanent group of direct reports or a virtual, highly diverse, widely-dispersed, temporary team created to tackle a specific problem or opportunity.

Have you made your people a real team bound by a genuine sense of “we”? If not, ask yourself — and your group members — these questions to understand what more you must do:

- 1.** Are we mutually committed to a compelling and worthwhile purpose? Do we know not just which task we must perform, but who will benefit from our work? Do we believe that if we disappeared today, the world would be different tomorrow?
- 2.** Are we pursuing clear goals based on that purpose, and do we have plans in place for reaching them?
- 3.** Does everyone know how the team does its work? Does everyone understand their roles and responsibilities? Are work processes clear? Do we share a set of values and beliefs about what we expect of each other and how we treat each other? Does everyone know how we're doing, both as a group and individually?

Finally (and paradoxically) don't ignore team members as individuals. It's human nature that we all want to belong to a group and we want to be recognized for our distinct contributions. Get to know and deal with each member uniquely — but always in the context of the team and its work.

Group vs. team: What's the difference?

Whether you're a new team or an existing group, creating an enjoyable workplace that practices transparent communication is key. Surprisingly enough, there is a big difference between leading a group vs. a team.

While they may seem similar, there are many key differences between the two that can affect the way you work.

In order to improve your working relationships it's important to understand the differences between a group vs. a team and how to encourage healthy communication styles in the workplace.

Group vs. team

A group is a collection of individuals who coordinate their efforts, while a team is a group of people who share a common goal. While similar, the two are different when it comes to decision-making and teamwork.

In a work group, group members are independent from one another and have individual accountability. On the other hand, in a team, team members share a mutual accountability and work closely together to solve problems. These dynamics inform the way tasks are handled and overall collaboration.

What is a group?

In short, a group is a number of people who work together. They have individual goals that they work toward collectively. While groups work toward separate goals, they have a related interest or identity that brings them together.

There are two types of groups: informal groups and formal groups. Informal groups are formed naturally around common interests, identities, or social goals. Formal groups are created by company leaders to perform a specific task for an organization.

Group advantages

There is some debate about whether groups or teams are better. The reality is, both have advantages and disadvantages, and it's up to you to decide which one is best for your needs. Here are some advantages of groups:

Groups build temporary relationships: Since groups focus on individual members working in parallel to one another, they build temporary working relationships such as short-term external projects or temporary internal consulting.

Groups are great for efficiency: While teams work to create efficiency for the greater good, groups focus on individual efficiency. This can improve effectiveness when looking at individual work and larger group objectives.

Groups focus on individual growth: Since groups support individual work, they also focus on individual growth. This can be seen in the form of individual experts rather than a team of experts.

While working in a group environment has its advantages, it also has some disadvantages, too. Let's look at some reasons why working in a group might not be right for you.

Group drawbacks

While groups support individual work and career growth, they don't share all of the advantages of working in a team setting. These disadvantages include not connecting work to goals and the lack of team bonding.

Here are some disadvantages of working in a group:

Groups can alienate individuals: Since groups work individually, there isn't as much time spent on team building. This lack of teamwork can alienate individuals and cause communication issues.

Groups don't support organizational goals: Likewise, this lack of teamwork can cause a gap in organizational clarity. This makes it difficult to connect work to organizational goals and objectives.

These disadvantages are why some organizations prefer working in teams. That's why it's important to also understand the advantages and disadvantages of teams.

What is a team?

A team is a number of people who work together to accomplish a shared purpose or goal. Each team is the sum of its parts, which means members of the team rely on one another to accomplish the outcome.

Teams work together to solve problems, create new products, and other functions such as aligning passions and purpose. There are a few different types of teams, including cross-departmental teams, process teams, and self-managed teams. Each of these differs slightly but shares similar advantages and disadvantages.

Team advantages

Working in a team environment has many advantages that all come back to working toward the same goals and supporting members in a shared experience. Many organizations work in a team setting vs. a group setting as they prefer the advantages of collaboration. These include improved productivity and quicker problem solving.

Here are some advantages of working in a team:

Teams build on collaboration and synergy: Teamwork can increase collaboration and synergy. These help support the overall goal and can aid in communication and organizational transparency.

Teams encourage group productivity: While groups aid in efficiency, teams have the advantage when it comes to productivity. This is because team members support each other's work and help solve the overall problem, making the actual work more productive.

Teams are better for problem solving: It's true that the more people brainstorm together, the better. This is why teamwork can help solve problems quicker and more effectively the first time around.

The advantages of working in teams can help organizations thrive thanks to teamwork and communication. That said, there are some disadvantages you should consider as well.

Team drawbacks

While teams have a variety of advantages, they also have some disadvantages. These disadvantages include struggling to support individual growth and efficiency issues.

Here are some disadvantages of working in a team:

Teams don't always focus on individual growth: While not always the case, some teams struggle with fostering individual growth. This is because results are most commonly focused on the greater good than what's best for each person.

Teams may struggle with efficiency: Teams have the advantage of productivity, though they can struggle with efficiency if the right organizational processes are not put into place. This can cause work to take longer than expected and deadlines to be missed.

While teams might struggle with these disadvantages, there are ways to minimize the effects with the right processes and leadership. The key is to facilitate organizational clarity that supports both teams and individuals.

How to lead groups vs. teams

Now that you know the advantages and disadvantages of groups vs. teams, you may be wondering how each translates into an organization. This is an important question to consider when gauging how to lead a group or team in your current organization.

Group-focused organizations:

When it comes to group organizational behavior, there is a lot to consider based on functionality and group dynamics. Group dynamics describe the interactions, attitudes, and behaviors between a set of people. These can negatively and positively affect teamwork depending on how they're set up.

Healthy group dynamics consist of fluid collaboration and transparency.

Unhealthy group dynamics might consist of a lack of teamwork which results in individual isolation. To prevent unhealthy group dynamics, implement a team-focused strategy that focuses on breaking down communication barriers.

Group leadership tip: To prevent communication issues, organize team building games to encourage group collaboration and healthy dynamics.

Team-focused organizations:

Organizations that are focused around team dynamics tend to have more transparency and fewer communication issues. This is because teams work together toward a shared goal and focus on problem solving together.

This leads to a healthy organizational behavior and positive interdependent relationships. To take this one step further, keep collective goals in sight, and empower your team to rely on one another to meet those objectives.

Team leadership tip: Communicate both project goals and business goals to create transparency and align work with relevant objectives.

Spark collaboration by transitioning from group to team

The dynamic that's right for your team won't be the same as everyone else. That said, team dynamics can help empower collaboration in the workplace and interdependent relationships.

Whether you lead groups vs. teams, always remember to keep individual growth in sight and encourage communication to improve productivity.

Looking for additional ways to increase productivity? Asana helps keep track of task management and keeps everyone organized in a shared workspace.

Stages of Team Development

Stage 1: Forming Stage

The forming stage is where a new team starts off. When everyone gets together for the first time, they start to figure out what they are doing. This is also known as 'getting to know each other' or 'getting comfortable with one another. The most crucial thing in this stage is that people feel safe enough to be themselves. They don't have to worry about being judged or criticized by others.

The purpose of forming is to establish trust between team members and ensure that they have similar goals and values.

Stage 2: Storming Stage

Once things start to settle down, the team begins to experience conflict and competition. The storming stage is the most critical and challenging stage to pass through - a period marked by conflict and competitiveness when individuals begin to assert themselves. Storming is about asserting yourself, having opinions, being passionate and being competitive. During storming, you may experience tension as well as frustration because there are disagreements within the group. However, if you allow these feelings to fester, then they will eventually turn into resentment and anger. If you're not careful, storming could lead to arguments, power struggles, gossip and even sabotage. To avoid all this, take steps to manage your emotions and maintain good relationships.

Stage 3: Norming Stage

With maturity comes stability. Teams should be able to work together without constant conflict and disagreement. Members of the team start to see each other more frequently and begin to develop a closer relationship. They learn to trust one another and become comfortable around one another.

The third stage of team development occurs when everyone on the team has developed a strong sense of belonging and trust. During this stage, teams also start to establish rules and procedures to guide decision-making and behaviour.

Stage 4: Performing Stage

The fourth stage of team development and occurs once the team has established itself as a cohesive unit. Once the team has reached the performing stage, its members begin to feel confident enough to perform at their peak level. Members of the team are comfortable sharing information and discussing problems openly. This is when the team starts to deliver results.

Session 2: Plan & Product Development**Introduction**

A marketing plan is a document that lays out the strategy (or strategies) you will implement in order to advertise, reach your target audience with your message, generate leads, and finally increase your sales.

Definition

"A marketing plan is a strategic roadmap that businesses use to organize, execute, and track their marketing strategy over a given period. Marketing plans can include different marketing strategies for various marketing teams across the company, all working toward the same business goals."

I- Creating Your Marketing Plan

- A marketing plan has to align with the overall objectives you want to achieve
- This will also improve the efficiency of your team and can even help prevent mistakes

Sections:**1. Analysis of the Current Situation**

- See the influence of external and internal factors
- Use the classic SWOT scheme
 - Strength
 - Weakness
 - Opportunity
 - Threats

2. Benchmark Against Your Competitors' Products and Services

- What is their budget and their business volume?
- What are the prices of their products or services?
- What is their sales process?
- How do they get their clients?

3. The SMART Objectives

- S for Specific
- M for Measurable
- A for Achievable
- R for Realistic
- T for Time-bound

4. Action Plan: Marketing Strategies

- Product strategy
- Price strategy
- Sales and distribution strategy

Promotion and communication strategy

5. Real Time Review of the Plan

- Objectives:
Are the objectives set being met?
- Compliance:
Are you following the actions planned?
- Strategies:
What are the most appropriate actions according to performance?
- Budget:
Does the plan fit the current budget of your business?
- Review:
Refers to any modification and/or extension of the plan

II- Product Development

A- The Meaning of Product

«A Product is a set of tangible physical attributes assembled in an identifiable form.»

- * Each product carries a commonly understood descriptive (generic) name.
- * In marketing, consumers want to buy not products, but solutions to problems.
- * Any change in a feature (design, color, size, packaging...) however minor, creates another product.
- * Consumers are buying then a want-satisfaction in the form of product benefits.

B- Classifications of Products

- Products are divided into:
 - Consumer Products
 - Business Products
- Are intended for use by household consumers for non-business purposes
- They are classified as:
 - convenience goods
 - shopping goods
 - specialty goods
 - unsought goods
- Are intended for use in producing other products or for providing services in a business
- They are classified as:
 - raw materials
 - fabricating materials
 - installations
 - accessory equipment
 - operating supplies

C- Importance of Product Innovation

- Businesses need to regularly look for new products and markets for future growth.
- Growth can be achieved through a product strategy:
 - 1) Market penetration
 - 2) Product development
 - 3) Market development
 - 4) Diversification

Topic 4 Marketing Plan

Session 2: Plan & Product Development

A marketing plan is a document that lays out the strategy (or strategies) you will implement in order to advertise, reach your target audience with your message, generate leads, and finally increase your sales. Your marketing plan will of course define your overall goals, but it should also include some of the smaller steps you will take in order to achieve those goals.

Definition

“A marketing plan is a strategic roadmap that businesses use to organize, execute, and track their marketing strategy over a given period. Marketing plans can include different marketing strategies for various marketing teams across the company, all working toward the same business goals.”

I- Creating Your Marketing Plan

A marketing plan has to align with the overall objectives you want to achieve, so be sure to create a detailed plan that reinforces the commitment of your team and defines a long term vision. This will also improve the efficiency of your team and can even help prevent mistakes (and solve them rapidly if they are made).

When creating your marketing plan, organization is key. There are a series of elements that every plan should include and a logical order in which they should be carried out in order for the final result to be coherent and successful.

Below are the five basic sections of a marketing plan and what should be included in each of them.

1. Analysis of the Current Situation

The first step is to analyze the current situation of your business. This step is necessary because, without it, you cannot define where you want to go.

With this analysis, you will be able to see the influence of external and internal factors. The external factors can include things like the overall social and economic situation in your industry or country or the particulars of the sector and market you work in. The internal ones refer to the business itself. For example, your team and resources.

To systemize the analysis and guarantee that you are not missing anything, you can always use the classic SWOT scheme: strengths, weaknesses, opportunities, and threats.

- Strengths are the positive internal aspects of the company, those that make it stand out from the competition and that make the team proud. In the strengths we find the key competitive advantage like having a highly qualified team, or being considered the best for X product.
- Weaknesses are the internal aspects of the company that are lacking, areas where the company is positioned below its competitors or which can be improved. To find them, pose questions such as, in which aspects are our competitors better or what things are we least satisfied with? Some examples of weaknesses could be lack of finances or a limited range of products.
- Opportunities represent the external factors that are in your favor and that can be used to the company's advantage. You can find opportunities by researching the current trends and changes within your target market. For example, there can be a legislative change that favors your brand or a product that you sell becoming a trend.
- Threats are external negative elements that can potentially affect you. They are the factors that can put your business in danger or reduce your market share. Identifying them quickly can help you neutralize them. To find them, pay attention to current changes and market trends. For example, new competitors could present a threat.

Besides SWOT, do a deep buyer persona analysis. Your buyer persona represents your ideal customer. It gives a name and face to your target market by creating a semi fictional representation of it. At minimum it should include the following sections:

- Who is your buyer? Here you'll need to pick up all the general information about your buyer profile, like demographic information and personal identifiers.
- How can your buyer persona help your business? Define the goals and the primary and secondary challenges of your buyer persona and explain how your business and brand can help him/her obtain them.
- Look at the challenges and needs of your customers and the most common complaints they have. Here, you can get some inspiration from the real comments you received during your research.
- Define the marketing and sales messages that will be communicated in order to reach this potential customer.

2. Benchmark against Your Competitors' Products and Services

This is another aspect in the overall analysis of external factors, but it deserves its own section within the marketing plan due to the important role it plays in the future of your business.

After assessing who your main competitors are, you'll need to answer the following questions:

- What is their budget and their business volume? Big companies publish their annual or quarterly results, so the information is easily accessible.
- What are the prices of their products or services? For B2C companies, this information is easy to find, while for B2B companies, you will have to do a little more research. Once you have this information, develop a price range and think of where you want to position your business.
- What is their sales process? From the first contact until conversion, the customer journey of your competitors can provide a lot of clues for your business. The most common way to find out about this is by playing the "client" role and asking for the information yourself.
- How do they get their clients? This refers to their marketing strategies. It is easy to find that out about their digital marketing strategies by checking their website, social networks, and any other digital channels. You can also use tools such as SEMrush and Google Alerts.

3. The SMART Objectives

Now that the starting points are clear, you have to define where you want to go and how to get there. It's time to set your marketing objectives.

This is one of the most important steps in any marketing plan, and perhaps the most neglected. Many times the management team sets unrealistic objectives based more on their "wishful thinking" than on the real and current standing of the company. To avoid this, always base the objectives on the SMART acronym:

- S or "specific": the objectives must be specific. The "increase brand awareness" kind of goals are too broad because they could mean almost anything and be justified in many different ways. Instead, something like "increase brand mentions on social networks by 20%" would be more adequate.
- M or "measurable": to know if a goal has been achieved, you have to be able to measure it. Therefore, in addition to defining the objectives with precision, you also need to clarify how you are going to measure them. Using the previous example, you could decide to measure the amount of brand mentions on a monthly basis through the Social Mention tool.
- A or "achievable": Trying to become the next Amazon in two days only serves as a discouragement for your team. When you set objectives, you have to take into account the effort, time required, and other costs derived, always starting from your current situation. Then, you can establish whether the goal is realistic or not.
- R or "relevant or realistic": for example, many digital marketers aim to increase their website visits. But if those visits are not "high quality" and do not lead to any conversions, in reality, they don't mean anything. The marketing objectives

have to respond to the business objectives and be relevant.

- **T or “time-bound”:** every objective needs a time frame to make sense, so do not forget to define your deadlines.

4. Action Plan: Marketing Strategies

With all this work done, you have arrived to the heart of the marketing plan: what are the actions that will lead you to achieve your goals?

In this section, we will define the marketing strategies, always going from the broad to the specific. In the end, the steps to follow and the order in which they will be carried out need to be extremely clear.

To organize and classify the strategies, it is very common to use the famous “4 P of marketing”:

Product strategy. Even if you have a very well defined and positioned product line, changes always occur. For example, you can launch new products, change the positioning of existing ones or update packaging.

Price strategy. Here it is very useful to analyze the information that you have about the competition. You need to define the launch prices of new products, consider whether you should make changes to those already on the market and, perhaps most importantly, decide the strategy around discounts, promotions and offers. Do not forget to take into account seasonal campaigns, like for summer, Black Friday, Christmas, etc.

Sales and distribution strategy: if you have detected any weaknesses in the customer experience or simply want to optimize it, you can make changes in this area. For example, search for new suppliers, include new distribution channels such as online sales, improve delivery times, and reduce shipping costs.

Promotion and communication strategy: here all the actions come into play to make your brand known through both online and offline media. Given the rapid evolution of the online marketing environment and the digital habits of consumers, this is one of the sections that you will have to review the most over time.

5. Real Time Review of the Plan

Last but not least, you have to keep in mind that your marketing plan is not a one-time thing. You must constantly modify it so that it always responds to the changing needs of the company.

For this to happen, it's best to organize regular meetings to evaluate the progress of the plan. The following five points can serve as guides for this:

Objectives: are the objectives set being met? Looking back, were they realistic, too ambitious, or did they fall short?

Compliance: are you following the actions planned? If you have strayed, why is that? If this is the case, it does not always make sense to correct these deviations; sometimes it's better to modify the plan and adapt if it is working.

Strategies: what are the most appropriate actions according to performance?

Budget: does the plan fit the current budget of your business? How is the plan affecting the income and expenses? Is it necessary to make modifications?

Review: refers to any modifications and extensions of the plan. For example, you can decide to complete the first version by adding a schedule of actions, assignments and tasks.

II- Product Development

Also called new product management -- is a series of steps that includes the conceptualization, design, development and marketing of newly created or newly rebranded goods or services. Product development includes a product's entire journey -- from the initial idea to after its market release.

A- The Meaning of Product:

“A Product is a set of tangible physical attributes assembled in an identifiable form.”

Each product carries a commonly understood descriptive (generic) name.

In marketing, consumers want to buy not products, but solutions to problems.

Any change in a feature (design, color, size, packaging...) however minor, creates another product.

Consumers are buying then a want-satisfaction in the form of product benefits.

B- Classifications of Products:

Products are divided into:

- 1- Consumer Products
- 2- Business Products

- Consumer Products are intended for use by household consumers for non-business purposes.

- Business Products are intended for use in producing other products or for providing services in a business.

a- Classification of consumer products: Consumer products are classified as:

- convenience goods
- shopping goods
- specialty goods
- unsought goods

The subdivision is based on consumer buying behavior rather than types of products.

b- Classification of business products:

Business goods are divided into five categories:

- raw materials
- fabricating materials
- installations
- accessory equipment
- operating supplies

C- Importance of Product Innovation:

Businesses need to regularly look for new products and markets for future growth. A useful way of looking at growth opportunities is the Ansoff Growth Matrix which suggests that there are FOUR main ways in which growth can be achieved through a product strategy:

(1) Market penetration: Increase sales of an existing product in an existing market

(2) Product development: Improve present products and/or develop new products for the current market

(3) Market development: Sell existing products into new markets (e.g. developing export sales)

(4) Diversification: Develop new products for new markets

Session 3: Marketing Strategy

I- What Is a Marketing Strategy?

- "A marketing strategy refers to a business's overall game plan for reaching prospective consumers and turning them into customers of their products or services."

II- Marketing Strategies vs. Marketing Plans

- The marketing strategy is outlined in the marketing plan—a document that details the specific types of marketing activities that a company conducts and contains timetables for rolling out various marketing initiatives.
- Marketing strategies should ideally have longer life spans than individual marketing plans because they contain value propositions and other key elements of a company's brand.

III- How to Create a Marketing Strategy

- 1) Identify your goals
- 2) Know your clients
- 3) Create your message
- 4) Define your budget
- 5) Determine your channels
- 6) Measure your success

IV- What is the best marketing method?

The most effective marketing strategies are those that are targeted toward a specific audience, focused on key benefits based on the audience's point of view and interests, and delivered at an appropriate time

V- Marketing Strategy Components

- 1) Marketing Mix (4 Ps of Marketing)
- 2) Marketing Objectives
- 3) Marketing Budget
- 4) Competitive Analysis
- 5) Segmentation, Targeting, & Positioning
- 6) Content Creation
- 7) Metrics & Key Performance Indicators

VI- 7 Steps of a Marketing Strategy Process

- 1) Build a marketing plan
- 2) Create buyer personas
- 3) Identify goals
- 4) Select the appropriate tools
- 5) Review your media
- 6) Audit and plan media campaigns
- 7) Bring it to fruition

Company Marketing Mix Template – [Company Name]	
<p>Product</p> <p>Name and describe all the products and services your company sells.</p> <p>Example:</p> <ul style="list-style-type: none">Product 1: Name and purpose.Product 2: Name and purpose.Product 3: Name and purpose.	<p>Price</p> <p>Lay out the price point(s) of your product and/or service line. This section can be an itemized list to correspond with your previous slide, or it can be a dollar range with an explanation.</p> <p>Example: "Our products range between \$8 and \$23 in price to the consumer, which helps us appeal to buyers looking for both a bargain and a higher-value item."</p>
<p>Place</p> <p>List the places where you sell each of your products and services, and note where some items are and are not available.</p> <p>Example: "Product #1 and Product #2 are available in stores throughout Boston and on our website, but Product #3 is an ecommerce exclusive for our online store."</p>	<p>Promotion</p> <p>Identify the promotional tactics your company engages in, both for your business as a whole and for specific products / services.</p> <p>Example: [Company Name] relies on the following promotional channels.</p> <ul style="list-style-type: none">BloggingGoogle and Social Media AdsVideo Marketing on YouTube and Social Media



Topic 4

Marketing Plan

Session 3: Marketing Strategy

I- What Is a Marketing Strategy?

A marketing strategy refers to a business’s overall game plan for reaching prospective consumers and turning them into customers of their products or services. A marketing strategy contains the company’s value proposition, key brand messaging, data on target customer demographics, and other high-level elements.

- A marketing strategy is a business’s game plan for reaching prospective consumers and turning them into customers of their products or services.
- Marketing strategies should revolve around a company’s value proposition.
- The ultimate goal of a marketing strategy is to achieve and communicate a sustainable competitive advantage over rival companies.

Definition:

A marketing strategy is a detailed, structured plan of a company’s promotional efforts across a wide range of platforms and channels. A marketing strategy typically includes objectives, target audience profiles, content creation steps, key performance indicators, and other components.

Understanding Marketing Strategies

A clear marketing strategy should revolve around the company’s value proposition, which communicates to consumers what the company stands for, how it operates, and why it deserves their business.

This provides marketing teams with a template that should inform their initiatives across all of the company’s products and services. For example, Walmart (WMT) is widely known as a discount retailer with “everyday low prices,” whose business operations and marketing efforts are rooted in that idea.¹

II- Marketing Strategies vs. Marketing Plans

The marketing strategy is outlined in the marketing plan—a document that details the specific types of marketing activities that a company conducts and contains timetables for rolling out various marketing initiatives.

Marketing strategies should ideally have longer life spans than individual marketing plans because they contain value propositions and other key elements

of a company's brand, which generally hold constant over the long haul. In other words, marketing strategies cover big-picture messaging, while marketing plans delineate the logistical details of specific campaigns.

Benefits of a Marketing Strategy

The ultimate goal of a marketing strategy is to achieve and communicate a sustainable competitive advantage over rival companies by understanding the needs and wants of its consumers. Whether it's a print ad design, mass customization, or a social media campaign, a marketing asset can be judged based on how effectively it communicates a company's core value proposition.

Market research can help chart the efficacy of a given campaign and can help identify untapped audiences to achieve bottom-line goals and increase sales.

III- How to Create a Marketing Strategy

Creating a marketing strategy requires a few steps.

1. Identify your goals: While sales are the ultimate goal for every company, you should have more short-term goals such as establishing authority, increasing customer engagement, or generating leads. These smaller goals offer measurable benchmarks for the progress of your marketing plan. Think of strategy as the high-level ideology and planning as how you accomplish your goals.

2. Know your clients: Every product or service has an ideal customer, and you should know who they are and where they hang out. If you sell power tools, you'll choose marketing channels where general contractors may see your messaging. Establish who your client is and how your product will improve their lives.

3. Create your message: Now that you know your goals and who you're pitching to, it's time to create your messaging. This is your opportunity to show your potential clients how your product or service will benefit them and why you're the only company that can provide it.

4. Define your budget: How you disperse your messaging may depend on how much you can afford. Will you be purchasing advertising? Hoping for a viral moment on social media organically? Sending out press releases to the media to try to gain coverage? Your budget will dictate what you can afford to do.³

5. Determine your channels: Even the best message needs the appropriate venue. Some companies may find more value in creating blog posts for their

website. Others may find success with paid ads on social media channels. Find the most appropriate venue for your content.

6. Measure your success: To target your marketing, you need to know whether it is reaching its audience. Determine your metrics and how you'll judge the success of your marketing efforts.

Example of a marketing strategy

For example, if your marketing plan is to promote a new product or service, you might have a strategy dedicated to how you're going to use email marketing to support these broader goals. Every marketing plan will most likely produce several marketing strategies as part of the broader plan.

IV- What is the best marketing method?

The most effective marketing strategies are those that are targeted toward a specific audience, focused on key benefits based on the audience's point of view and interests, and delivered at an appropriate time – when the audience is most likely to be attentive to and interested in the message being delivered.

A marketing strategy will:

- Align your team to specific goals.
- Help you tie your efforts to business objectives.
- Allow you to identify and test what resonates with your target audience.
- Empower you to capitalize on emerging trends.

V- Marketing Strategy Components

- 1- Marketing Mix (4 Ps of Marketing)
- 2- Marketing Objectives
- 3- Marketing Budget
- 4- Competitive Analysis
- 5- Segmentation, Targeting, & Positioning
- 6- Content Creation (Including Trending Content)
- 7- Metrics & Key Performance Indicators

1- Marketing Mix (4 Ps of Marketing)

The marketing mix, also known as the 4 Ps of marketing, is the preliminary document you must create to understand what you will be marketing, where you'll be marketing it, and how you'll be marketing it. The following P's make up this framework:

Product: What are you selling?

Price: What is the price?

Place: Where will you be selling the product?

Promotion: Where will you be promoting the product?

You can then extrapolate this information into a full-fledged marketing plan for each promotional channel. It's important to lay out the information in broad strokes so that you understand the overall direction of your marketing strategy.

2. Marketing Objectives

You can set your marketing objectives in conjunction with your 4 Ps, or right after. Either way, you should outline your marketing goals before building upon your strategy. Why? Because your goals will inform other components of the plan, including the budget and content creation process.

With every objective, you should aim to be as specific as possible. Try to create SMART marketing goals divided by channel or promotional tactic, and don't forget that you can always come back and revise your goals as your priorities change.

3. Marketing Budget

A marketing budget is an essential element of your strategy. Without allotting funds to hiring the right talent, using the right software, advertising on the right channels, and creating the right content, your marketing strategy won't have a powerful impact. To get a high return on investment, you must first invest.

Remember that you can always start small — hyper-focusing your budget on one or two efforts — and build upon them once you generate an ROI.

4. Competitive Analysis

Knowing your competition is key when creating a marketing strategy. Otherwise, you risk “yelling into the void” without measurable results. Worse, you won't know whether you're differentiating yourself enough from the competition and effectively drawing the attention of your intended audience.

You might already have an idea of whom your competitors are, but it's still essential to sit down and identify them. You might end up uncovering a surprise competitor who's vying for your target buyer's attention and engagement.

5. Segmentation, Targeting, and Positioning

Segmentation, targeting, and positioning (STP) refers to the process of delivering “more relevant, personalized messages to target audiences.” In other words, rather than publishing posts and advertisements on a whim, you'll go through a

methodical process for creating content that resonates with your target buyer.

During the segmentation, targeting, and positioning process, you'll take three steps:

Identify your target audience. This process not only entails interviewing your current customers, but carrying out market research and creating buyer personas. Target a segment of your target audience. It's best to speak to a narrow group of highly qualified buyers than to send your message out to everyone.

Position your brand relative to other brands. What do you do better than your competitors? It's essential to map this information when creating a marketing strategy.

6. Content Creation

Once you have your budget, competitive outlook, and STP information, it's now time to take the most critical step: Creating your marketing content. But it's essential to undertake this effort strategically. For one, you don't want to publish random content that doesn't solve for the customer, and for two, you must aim to capitalize on emerging trends so that your brand enjoys high visibility in the marketplace.

The competition is fierce across all formats. According to HubSpot Research, “half of marketers are using videos, with 47% leveraging images, followed by 33% posting blogs articles, infographics (30%) and podcasts or other audio content (28%).” Of these, video has the highest ROI.

It's even more essential to invest in trends that have a high ROI, such as short-form video, influencer marketing, and social media DMs.

That doesn't mean you shouldn't invest in blogging, one of the most proven content marketing techniques. It's simply important to know where to allot the most resources, especially if you have a limited budget.

7. Metrics & Key Performance Indicators (KPIs)

Last, but certainly not least, your marketing strategy must include metrics and key performance indicators to understand how well your strategies are working. The KPIs you choose will vary depending on your business type and preferred customer acquisition channels.

A robust marketing strategy will reach your target audience — this includes those who have never heard of your brand all the way to repeat customers.

Without a defined strategy, you'll essentially be throwing things to the wall to see what sticks. And it's costing you cost, time, and resources.

There are seven key steps to crafting a successful marketing strategy: Build your marketing plan, create your buyer personas, identify your goals, select the tools, review your existing resources, audit and plan media campaigns, and lastly, execute your strategy.

VI- 7 Steps of a Marketing Strategy Process

- 1- Build a marketing plan.
- 2- Create buyer personas.
- 3- Identify goals.
- 4- Select the appropriate tools.
- 5- Review your media.
- 6- Audit and plan media campaigns.
- 7- Bring it to fruition.

1. Build a marketing plan.

Your marketing strategy provides an overview of the reasons why your marketing team will need certain resources, take certain actions, and set certain goals over the year. Your marketing plan is the specific actions you'll take to achieve that strategy.

2. Create buyer personas.

If you can't define who your audience is in one sentence, now's your chance to do it. A buyer persona is a snapshot of your ideal customer.

For example, a store like Macy's could define a buyer persona as Budgeting Belinda, a stylish working-class woman in her 30s living in a suburb, looking to fill her closet with designer deals at low prices.

With this description, Macy's Marketing department can picture Budgeting Belinda and work with a clear definition in mind.

Buyer personas have critical demographic and psychographic information, including age, job title, income, location, interests, and challenges. Notice how Belinda has all of those attributes in her description.

You don't have to create your buyer persona with a pen and paper. In fact, HubSpot offers a free template you can use to make your own (and it's really fun).

You can also use a platform like Versium, which helps you identify, understand and reach your target audience through data and artificial intelligence.

Buyer personas should be at the core of building your strategy.

3. Identify your goals.

Your marketing strategy goals should reflect your business goals.

For example, if one of your business goals is to have 300 people attend your annual conference in three months, your goal as a marketer should be along the lines of boosting online registration by 10% at the end of the month to stay on track.

Other marketing goals might be to increase brand awareness or generate high-quality leads. You might also want to grow or maintain thought leadership in your industry or increase customer value.

Whatever your goals, identify what they are and how your marketing organization can work to achieve them over the next year.

4. Select the appropriate tools.

Once you have your goals identified, make sure you have the right tools to measure the success of those goals.

Online software like social media schedulers gives you analytics to help you keep track of what your audience likes and doesn't. Alternatively, you might consider Google Analytics to measure blog and web page performance.

5. Review your media.

Decide what you already have in your arsenal that can help you create your strategy. To streamline this process, think of your assets in three categories – paid, owned, and earned media.

Paid media means any channel you spend money on to attract your target audience. This includes offline channels like television, direct mail, and billboard to online channels like social media, search engines, and websites.

Owned Media refers to any of the media your marketing team has to create: pictures, videos, podcasts, ebooks, infographics, etc.

Earned media is another way to say user-generated content. Shares on social media, tweets about your business, and photos posted on Instagram mentioning

your brand are all examples of earned media.

Gather your materials in each media type and consolidate them in one location to have a clear vision of what you have and how you can integrate them to maximize your strategy.

For example, if you already have a blog that's rolling out weekly content in your niche (owned media), you might consider promoting your blog posts on Twitter (paid media), which customers might then reTweet (earned media). Ultimately, that will help you create a better, more well-rounded marketing strategy.

If you have resources that don't fit into your goals, nix them. This is a great time to clean house and identify gaps in your materials.

6. Audit and plan media campaigns.

Cleaning house segues straight into this step. Now, you must decide which content is going to help you.

Focus on your owned media and marketing goals. For instance, will updating the CTAs at the end of your blog posts help you increase RSVPs to your event?

Next, look at your buyer personas. Let's say you work for a video editing software company. If one of your persona's challenges is adding clean sound effects to their videos but you don't have any content that reflects that, make a 15-second demo video for Instagram to show how great your product is at solving that challenge.

Finally, create a content creation plan. The plan should include topic clusters, goals, format, and channel for each piece of content. Be sure to include which challenge it's solving for your buyer persona.

7. Bring it to fruition.

At this point, your market research and planning should help you visualize how your strategy will be executed – and by which teams.

The final step is to bring that all together and assign actions to your plans.

Create a document that maps out the steps you need to take to execute your campaign. In other words, define your strategy.

Think long-term when creating this document. A standard strategy document is

12 months. This structured timeline should be the home base for your strategic marketing efforts.

To paint an example, let's go back to the video software company.

Maybe in January, you will launch a software update that improves the exportation process for users. In April, you want to publish an ebook that explains editing terms to your buyer personas, and in September, you plan to launch an integration with other software.

Remember, your digital strategy is unique to your business, so the document should be as well. As long as the strategy includes the pertinent details outlined in previous sections, you'll be set.

Session 4: Between Selling & Marketing

I- Introduction

- Marketing builds awareness and attracts leads to your business. Sales convert those leads into paying customers. Businesses need to use a holistic, collaborative approach that involves both departments working together to reach common goals.
- In simple words, selling transforms the goods into money, but marketing is the method of serving and satisfying customer needs. The marketing process includes the planning of a product's and service's price, promotion and distribution.

II- What is Selling?

The selling theory believes that if companies and customers are dropped and detached, then the customers are not going to purchase enough commodities produced by the enterprise.

- What is Marketing?

The marketing theory is a business plan, which affirms that the enterprise's profit lies in growing more efficient than the opponents, in manufacturing, producing and imparting exceptional consumer value to the target marketplace.

III- Difference Between Selling and Marketing

1) Definition:

● The selling theory believes that if companies and customers are dropped detached, then the customers are not going to purchase enough commodities produced by the enterprise. The notion can be employed argumentatively, in the case of commodities that are not solicited.

● The marketing theory is a business plan, which affirms that the enterprise's profit lies in growing more efficient than the opponents, in manufacturing, producing and imparting exceptional consumer value to the target marketplace.



2) Related to:

- Selling: Constraining customer's perception of commodities and services.
- Marketing: Leading commodities and services towards the consumer's perception.

3) Beginning point:

- Selling: Factory
- Marketing: Marketplace

4) Concentrates on:

- Selling: Product
- Marketing: Consumer needs

5) Perspective:

- Selling: Inside out
- Marketing: Outside in

6) Business Planning:

- Selling: Short Term
- Marketing: Long Term

7) Orientation:

- Selling: Volume
- Marketing: Profit

8) Cost Price:

- Selling: Cost of Production
- Marketing: Market ascertained

IV- 5 Different Types of Marketing

- 1) Relationship Marketing
- 2) Word of Mouth
- 3) Digital Marketing
- 4) Paid Advertising
- 5) Cause Marketing

V- Why Selling is Important?

● It has the capacity to strengthen relationships with customers, influence them to buy the commodity and create repeat business.

● Main reasons:

- Allows personal meeting
- Make direct conversation
- Gain customer loyalty

VI- Why Marketing is Important?

- Marketing is essential for creating brand awareness, strengthening sales, and retaining customers.
- Main reasons:
 - Provide effective information
 - The backbone of business
 - Increase sales

WAYS	MARKETING	SALES
MEANING	Marketing deals with understanding customers' requirements. As a result, when a product is manufactured, it gets sold hassle-free.	A sale is the transferring of ownership of a product from its manufacturer to the end customer for money.
MAIN FOCUS	Customer-focused	Product-focused
EMPHASIS	Needs of the market	Needs of the company
APPROACH	Integrated	Fragmented
DURATION	Long-term	Short-term
SCOPE	Related to all activities which drives the customers to buy the products	Related to flow of goods to the ultimate customers.
TARGET	Huge audience	Small groups or individuals
ACTIVITY IS DONE ON/BY	Media	Persons
RELATIONSHIP	One to innumerable	One to one
ACTIVITY	Research, advertisements, sales, after sales service, customer satisfaction, and so on.	Product is created to fulfill the needs of the customers.

Topic 4
Marketing Plan

Session 4: Between Selling & Marketing

I- Introduction

In every business today, we often come across the concept of marketing and selling, a number of times. The concept of marketing focuses firstly on the customer’s requirements, and then the means to fulfil that need is identified.

In marketing, the customer creates market demand. On the other hand, the concept of selling emphasizes only the requirements of the seller; therefore, in this process, the seller rules the market.

Though the terms marketing and selling sound familiar, however, there is a fine line that differentiates between these two concepts, which includes activities, process, outlook, and management etc.

The marketing process includes the planning of a product’s and service’s price, promotion and distribution. This article will help you understand all the important points that distinguish the two words.

Marketing builds awareness and attracts leads to your business. Sales convert those leads into paying customers. Businesses need to use a holistic, collaborative approach that involves both departments working together to reach common goals.

In simple words, selling transforms the goods into money, but marketing is the method of serving and satisfying customer needs. The marketing process includes the planning of a product’s and service’s price, promotion and distribution.

What is Selling?

The selling theory believes that if companies and customers are dropped and detached, then the customers are not going to purchase enough commodities produced by the enterprise.

The notion can be employed argumentatively, in the case of commodities that are not solicited, i.e. the commodities which the consumer doesn’t think of buying and when the enterprise is functioning at more than 100% capacity, the company intends at selling what they manufacture, but not what the market requires.

In the sales process, a salesperson sells whatever products the production department has produced. The sales method is aggressive, and customer's genuine needs and satisfaction is taken for granted.

The marketing theory is a business plan, which affirms that the enterprise's profit lies in growing more efficient than the opponents, in manufacturing, producing and imparting exceptional consumer value to the target marketplace.

Marketing is a comprehensive and important activity of a company. The task generally comprises recognizing consumer needs, meeting that need and ends in customer's feedback.

In between, activities such as production, packaging, pricing, promotion, distribution and then the selling will take place. Consumer needs are of high priority and act as a driving force behind all these actions. Their main focus is a long run of business ending up with profits.

It depends upon 4 elements, i.e. integrated marketing, target market, profitability customer and needs. The idea starts with the particular market, emphasises consumer requirements, regulates activities that impact consumers and draws gain by serving consumers.

II- Top 8 Difference Between Selling and Marketing

1) Definition

The selling theory believes that if companies and customers are dropped detached, then the customers are not going to purchase enough commodities produced by the enterprise. The notion can be employed argumentatively, in the case of commodities that are not solicited.

The marketing theory is a business plan, which affirms that the enterprise's profit lies in growing more efficient than the opponents, in manufacturing, producing and imparting exceptional consumer value to the target marketplace.

2) Related to

Selling: Constraining customer's perception of commodities and services.

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Selling: Factory

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4) Concentrates on:

Selling: Product

Marketing: Consumer needs

5) Perspective:

Selling: Inside out

Marketing: Outside in

6) Business Planning:

Selling: Short Term

Marketing: Long Term

7) Orientation:

Selling: Volume

Marketing: Profit

8) Cost Price:

Selling: Cost of Production

Marketing: Market ascertained

III- 5 Different Types of Selling

The five top types of selling are:

1) Aggressive Selling - In this type, the only intention of a salesperson is to sell the product in one shot.

2) Consultative Selling - This type of selling believes in building trust with their customers. A sales representative's main object is not selling the product but building a relationship with their client.

3) Need Oriented Selling - Here, a seller has to perform a smart job by observing the movements and words of a customer. Under this form, a sales representative notices the customer accurately by asking different questions and assessing the customer needs.

4) Product-Oriented Selling - This method of selling is based on product features and benefits; the salesperson explains everything about the product until the customer is completely satisfied. Providing demos are part of this selling process.

5) Competition Oriented Selling - Under this form, the sales representative believes in staying one step ahead of the competition. They believe in convincing the customers to purchase the product and never accept a no for an answer.

IV- 5 Different Types of Marketing

The five top types of marketing are:

- 1) **Relationship Marketing** - This kind of marketing focuses on building a relationship with the customer, improving existing relationships, and enhancing customer loyalty.
- 2) **Word of Mouth** - It is the most powerful type of marketing approach. It completely depends on what impact you leave on the customers with the quality of product and services.
The customers who have opted for the service or bought a product will promote it on behalf of the company to their friends, colleagues, and neighbours, etc., only if they are satisfied. If they are not impressed, then that can result in negative publicity.
- 3) **Digital Marketing** - It normally appears over the internet. All the marketing details are given on the internet and promoted on multiple platforms via various approaches.
- 4) **Paid Advertising** - It incorporates traditional marketing approaches like TV ads, radio, and print media advertising.
- 5) **Cause Marketing** - This approach associates the products and services of a firm to a social cause or issue. Therefore, It is known as cause-related marketing.

Examples of Selling

- Business-to-Business Sales
- Door-to-Door Sales
- Cold Calling
- Personal selling

Examples of Marketing

- Cold Calling
- Newsletters
- Search Engine Marketing
- Meeting customers at Trade shows
- Product placement in Entertainment platforms (video games)

V- Why Selling is Important

In any organisation, selling is important as it has the capacity to strengthen relationships with customers, influence them to buy the commodity and create repeat business. A sale is a part of a firm's marketing and promotions. Top reasons to describe the importance of selling are mentioned below:

Personal Meeting - It is one of the most effective forms of promotion for a business.

Here, sellers can make eye contact, make conversation, and demonstrate the advantages of the product or services.

Make direct conversation - This impacts a sale by listening to the seller as it can more efficiently communicate a value proposition.

Get direct Feedback- Great salespeople and companies can utilise the opportunity to obtain feedback on their company, goods, and service.

Gain Customers Loyalty - Selling helps in managing ongoing customer relations. The salesperson connects with the customers and maintains conversations about customer needs.

VI- Why Is Marketing Important?

Marketing is a significant part of any company. Marketing is essential for creating brand awareness, strengthening sales, and retaining customers.

Most of the businesses today are adopting digital marketing for promoting their goods and services.

They offer their goods on online platforms. Marketing is one sector which is expanding rapidly.

There are many purposes of core marketing, such as purchase, sale, finance, transport, etc.

Provide Effective Information - It is the most efficient way of interaction with your potential buyers.

The backbone of Business – Marketing is like fuel for a business, without it, a company cannot sustain itself for long. It is used to fulfil every business requirement.

Increase Sales - It is important to boost sales and revenue.

Save Cost & Time-With this tool; a business can quickly reach a large audience. It helps in creating brands awareness, improves sales and extends customer services.

Contact Information:

CIES Onlus

Development Information
and Education Center

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cies@cies.it

www.enicbcmmed.eu/projects/mysea

