Advanced Energy Project

Project planning and working with clients virtually

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Schedule for today

14:15-14:30   **Introduction to project planning**

14:30-14:55   **Team work on Miro**

14:55-15:05   ***Break***

15:05-15:30   **Virtual teamwork and meeting with clients**

15:30-15:50   **Planning for client meetings**

15:50-16:00   **Debrief and Q&A**

Nice to e-meet you! Who are you?

Write in the Zoom chat:

- **Name**

- **Major subject**

- **What project is your team working on?**

My name is Laura Sivula!

I work as Head of Summer School and Program Director at Aalto University.

I teach digital business, agile methods in organisations and futures competences.

Fun fact: I bought a pasta machine during "corona spring"

A specified amount of work to be performed

In a specified amount of time

At a specified cost

A project is a temporary endeavor with a defined beginning and end that produces a unique deliverable, or another similar definition.

Project characteristics

How can I identify a project?

A target outcome

A defined life span

Cross organisational participation

Stakeholder participation

New or unique

Time, cost and performance requirements

Project management areas

Knowledge areas
and processes

Skills and
competences

Instructions, tools
and documentation

Project effort vs work effort

Once the "project" label is applied, project management process, governance, reporting and roles often follow

Project management takes time, people and money

If the organisation is not really worried about deriving specific value from an effort or is not injured significantly by its lack of success, then it's not a project — it's just work!
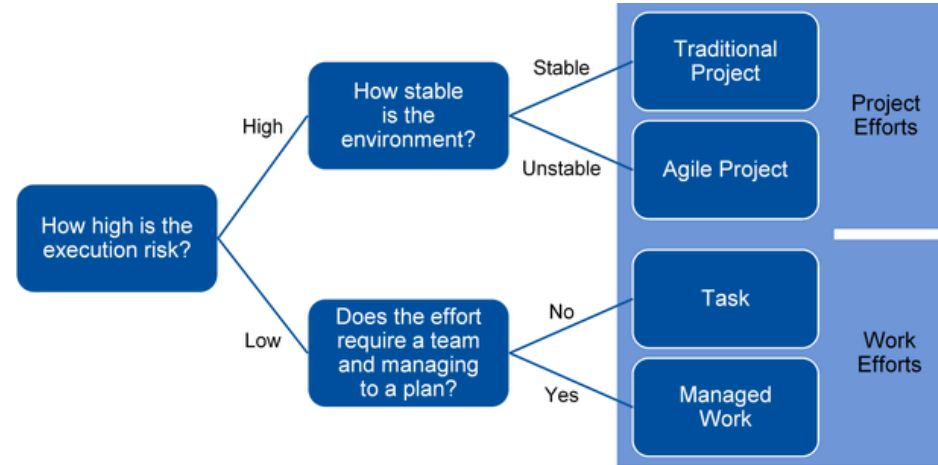
Typical downfalls

Client not committed enough

Project time frame too long

Risk management

Poor testing

Stakeholder commitment

What influences stakeholder commitment?

- Good communication atmosphere
- Experiences of trustworthy co-operation
- Synergy, sharing knowledge
- Experienced quality
- Professionality of project manager and good attitude
- Stakeholders are a huge asset

Project planning step-by-step

- **Identify and meet stakeholders**

- **Set and prioritise goals**

- **Define deliverables**

- **Create project schedule**

- **Identify issues and complete risk assessment**

- **Present the project plan to stakeholders**

Kanban board

A Kanban board is a tool for workflow visualization and one of the key components of the Kanban method.

Visualizing your workflow and tasks on a Kanban board helps you better understand your processes and gain an overview of your workload.

The main components of the Kanban board are: To do, In progess, Done.

Sprint 4

To do | 4 ⋯

Download Android app

`Android`

Sign in to the bank account in the Android app

`Android`

Change and update account details in the iOS app

`iOS`

Set up recurring utilities payments

In progress | 3 ⋯

Use two-factor authentication to access the iOS app

`Security` `iOS` `📅 Jun 10`

View transaction history by category

`📅 Jun 10`

Set and monitor progress on financial goals

Done | 5 ⋯

Download iOS app

`iOS` `📅 Jun 03`

Sign in to the bank account in the iOS app

`iOS`

Change and update account details in the iOS app

`iOS` `📅 Jun 03`

View transaction history

Transfer money between accounts

`Security`

Share

Move objects or canvas

Move canvas only

Add objects tap

Add last double tap

Multiselect long press+drag

Zoom in/out

100%

Miro links

Team Caruna: https://miro.com/app/board/o9J_kkoVfTM=/

Team ET: https://miro.com/app/board/o9J_kkoVffo=/

Team Helen: https://miro.com/app/board/o9J_kkoVfYk=/

Team Neste: https://miro.com/app/board/o9J_kkoVfZA=/

Team ST1: https://miro.com/app/board/o9J_kkoVfal=/

Team UPM: https://miro.com/app/board/o9J_kkoVfbU=/

Team Wärtsilä: https://miro.com/app/board/o9J_kkoVfbw=/

Start planning

Fill in the Kanban board in Miro as much as you can

In Breakout rooms wiht your project team:

1. Think about all the tasks you need to work on to succesfully complete your project.

2. Document them on your Miro board (link on next slide) and choose the right Kanban category for them: To do, In progress, Done.

You will have 25 minutes time for this exercise (I will visit you in your Breakout rooms if you have any questions).

Break

—

5 min

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Virtual team work and meetings

Things That Help when Working Remotely
@HYPERISLAND

How do you feel?
REGULAR CHECK-INS

Be sure to use SHARED ONLINE KNOWLEDGE SPACES

STAY ACTIVE with WORKOUTS and eXeRCISes

DRESS Yourself LIKE YOU'RE GOING TO WORK

MAKE a WORKSPACE Your OFFICE @ HOME

News
MINI-MIZE DISTRACTIONS
use MUTE!

Leave your computer AND TAKE BREAKS
DRINK WATER
separate + make MEALTIME

Rest Your Eyes

GET ORGANIZED

COMMUNICATE REGULARLY: CLEARLY, KINDLY, AND OFTEN.

TRACK YOUR TIME & KNOW WHEN TO LOG OFF!

9 10 11   16 17

ILLUSTRATIONS by @DANOMARR

Tools available for Aalto students

Google drive (gdrive.aalto.fi)

Microsoft Teams (o365.aalto.fi)

Zoom (aalto.zoom.us)

Top tips for virtual teamwork

Align your teamwork around goals – make sure everyone is committed to tasks and resposibilities

Engage in collaboration – help each other to feel connected, say hi with videos, organise hangouts

Promote individual and team effectiveness – work together when needed, but remember to give each other space for concentrating

Build trust via transparency – make sure everyone has access to documentation and information

Meeting design

Intention – What is the intention, or purpose, of the meeting? In other words, why have it?

Desired outcome(s) – What specific outcomes should be achieved by the end of the meeting?

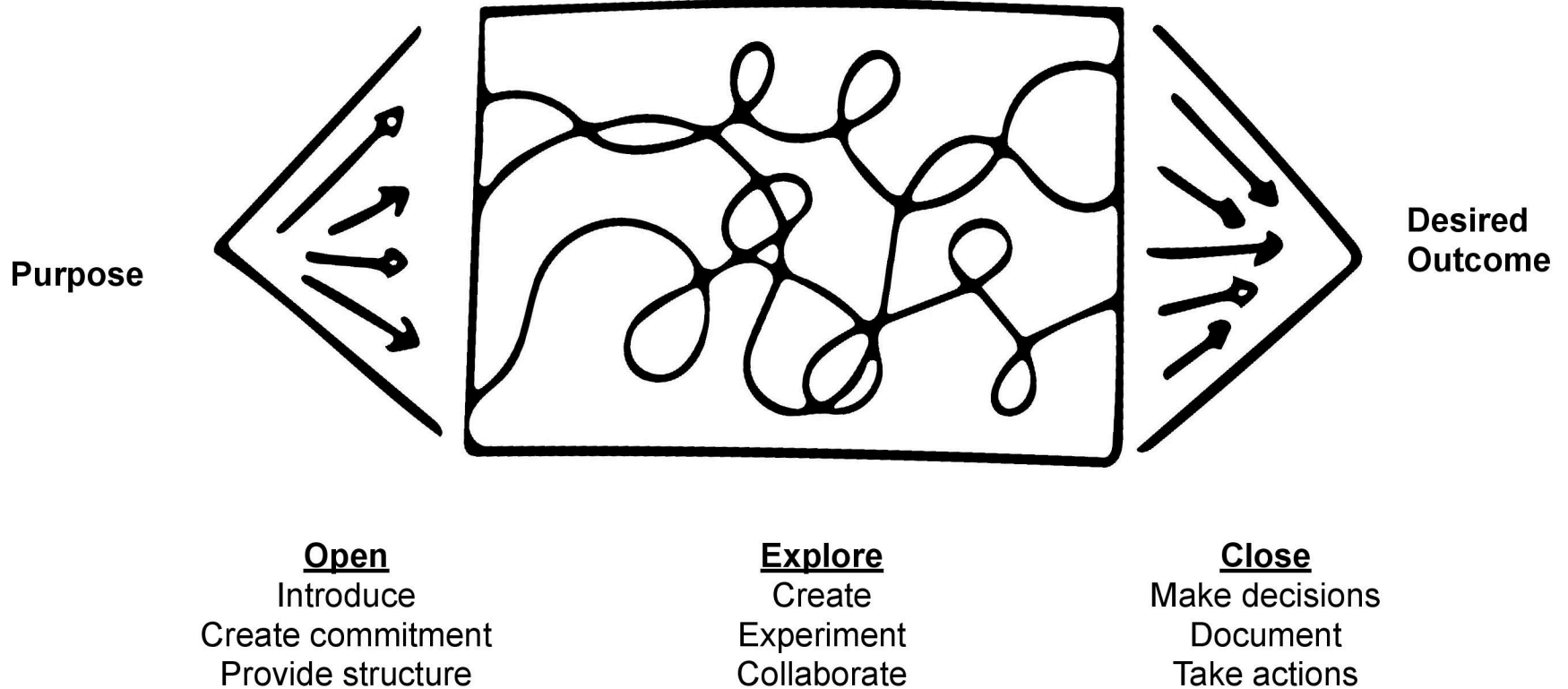**Agenda** – What activities will the group go through, in what order, to move toward the desired outcome?

Roles – What roles or responsibilities need to be in place for the meeting to run smoothly? Who is facilitating, and who is participating? Who is documenting, and who is keeping track of the time? What do you expect of the participants?

Rules – What guidelines will be in place during the meeting? These could relate to agreed group norms. They could also relate to use of laptops/mobiles, or practical rules related to a space. Let the participants add rules to ensure that they have ownership of them.

Time – What is the expected time for the meeting, including breaks, and at what time will the meeting end?

Source: https://toolbox.hyperisland.com/idoarrt-meeting-design

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A DESIGN PROCESS

Purpose

Desired Outcome

Open	**Explore**	**Close**
Introduce	Create	Make decisions
Create commitment	Experiment	Document
Provide structure	Collaborate	Take actions

Zoom etiquette

Share your Zoom link with your intended participants in good time. Do this via a calendar invite as well as in Slack or MS Teams (or whatever you might use), so that everyone knows exactly where to be, at what time, and what the agenda is. Also, it usually takes a few minutes for everyone to join the call, so prepare to wait a few minutes for everyone to arrive.

A few Zoom tips:

- Always "mute" when not talking. It reduces the background noise and gives a visual cue to facilitators that someone wants to talk.

- Have a "camera-on" rule for all participants (if needed), and be early so you can be there to welcome people. Otherwise, people will get a message saying "waiting for the host to start the meeting".

Prepare for client meetings

Good, informative and effective meetings don't just happen.

They are managed events!

Plan the agenda

Stay on schedule

Make clear decisions of next steps and who does what by when

Send a memo afterwards

Before and after the meeting

Agenda

- What needs to be discussed?

- What needs to be decided?

- What do we need to know after this meeting?

→ Send to the client beforehand

Memo

- Who were present?

- What was discussed?

- What was agreed?

- What are the next steps?

→ Send to the client afterwards

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Questions to ask from the client?

Time for a little bit of brainstorming!

In the chat:

1. What would be good questions to ask from the client in the first/next meeting?

2. What do you need to know in order to proceed with your project?

→ Write in the chat!

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Questions to ask from the client

- What are the expectations for this project? Desired outcome?

- What do you want to get delivered after the process?

- What is the aim of the project?

- What are the company's future objectives?

- Where is the company heading in the long-term?

- How do you measure success as a company?

- What kind of strategic initiatives you have?

- Do you want to create a new concept or idea? Or get validation for an exisitng one?

- Is the project part of a bigger effort or is it a stand-alone?

- What do you know about your target group or customers currently?

- Who are potential competitors?

- How will you evaluate the success of this project?

- What are the resources, information or data that you could provide us?

What is the use case?

Why the project ?

How do you want to communicate?

Their involvement?

How do you wanna handle disclosure?

what tools do you have for us/ that we can use?

How much of the process of the project do you want to see?

What are your expectations on Quality and Quantity levels

- What are you working on and where are you heading as a company (main goals)?

- What is your solution expectation

- What information can we share and what should be kept top secret? (Confidetiality aspects)

- Who will be contact person from the company side?

- Schedule - how frequently we meet, what will be the milestones, etc

- What would you expect as a final product of our cooperation?

- To ask about the scope and expectation & the of the project from the company.

- Means of communication?

- What data/info they can provide?

- Customer's role and involvement in the project.

- Time frame and schedule of the project.

What are the final goals of the project (spesificly)?

Can you give check points during the project?

Can you give feedback during the project?

Which information is confidential and which is not?

Asking to the clients about determining the schedule/timeframe and the scope of the work.

In one of the projects, there are 6 tasks that need to divided into this timeframe.

Asking technical background information of the topic (the progress before we met them) and

what they want from us (deliverables).

Late

Not participating

Confused

Free-riding

Not asking questions

In bed

Unprepared

- Always be on time, pre-check microphone and video

- Look sharp + calm environment/background

- Prepare well for the meetings and respect everyone's time

- Pay attention in communication as it is the key in understanding each other correctly

- Clients have bunch of other things to do alongside this project

- Give partners time to respond to your questions

Do you have any questions?