



# micro.P3.express

minimalist project management system for micro-projects



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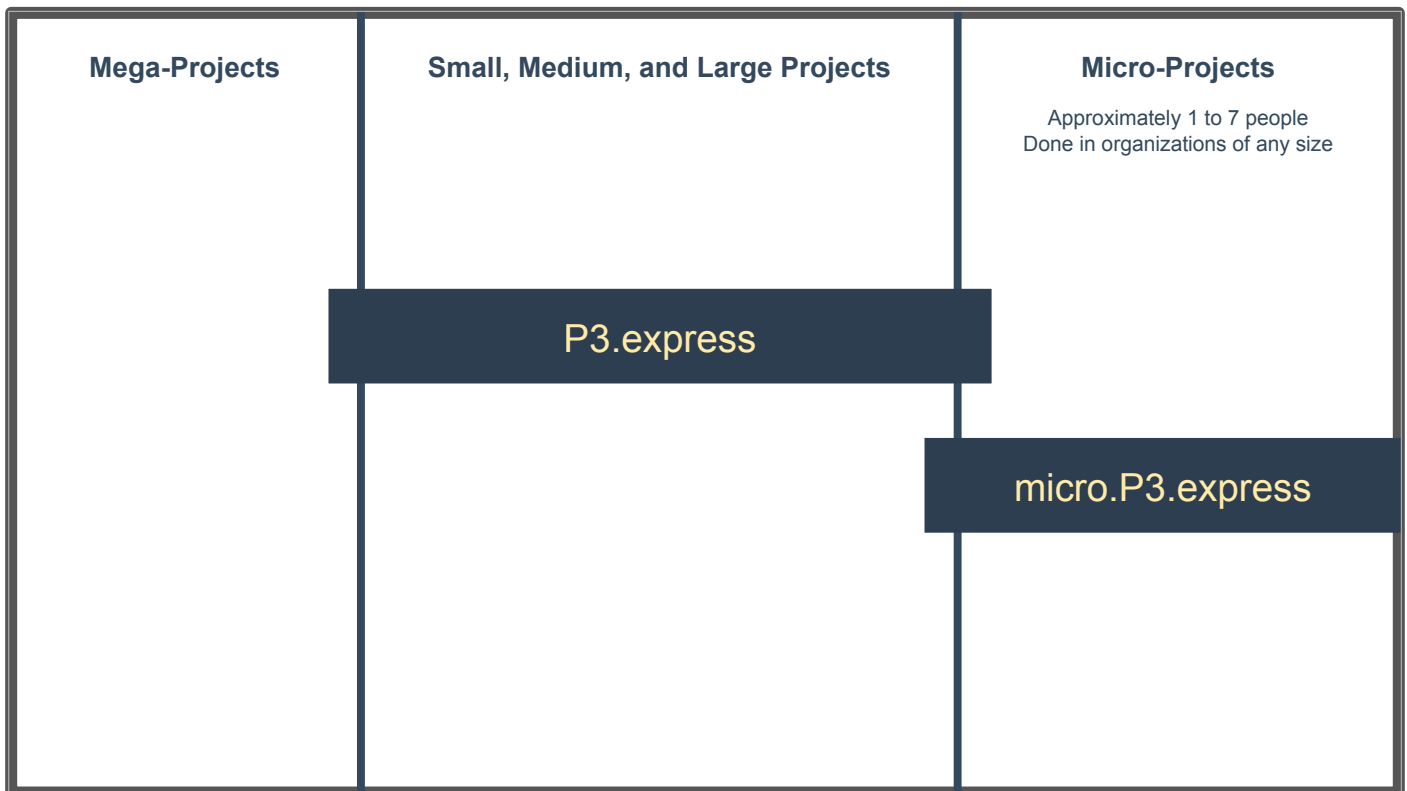
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- ① High-level overview
  - ② Full review
  - ③ NUPP
  - ④ Tailoring
  - ⑤ Context
  - ⑥ Certification

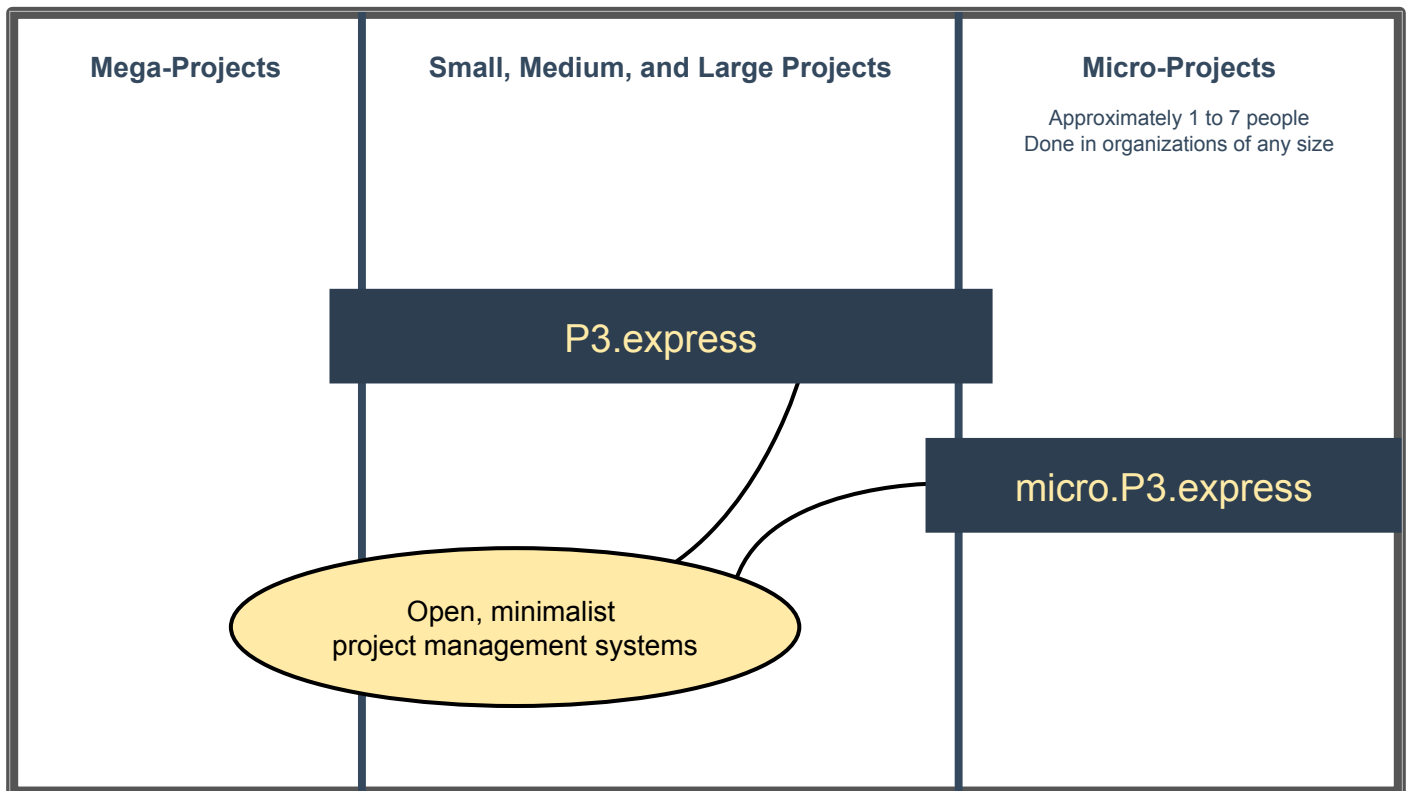
The first section is a really high-level overview of how micro.P3.express works to give your audience a simple foundation. We'll build on top of that in the next section by adding more details. So, ensure you're not going through too much detail yet, and focus on creating the foundation for your audience.



P3.express is designed for small, medium, and large projects, and practitioners who want to use it for micro- or mega-projects would need serious tailoring. That's why micro.P3.express is created: It's a tailored form of P3.express for micro-projects.

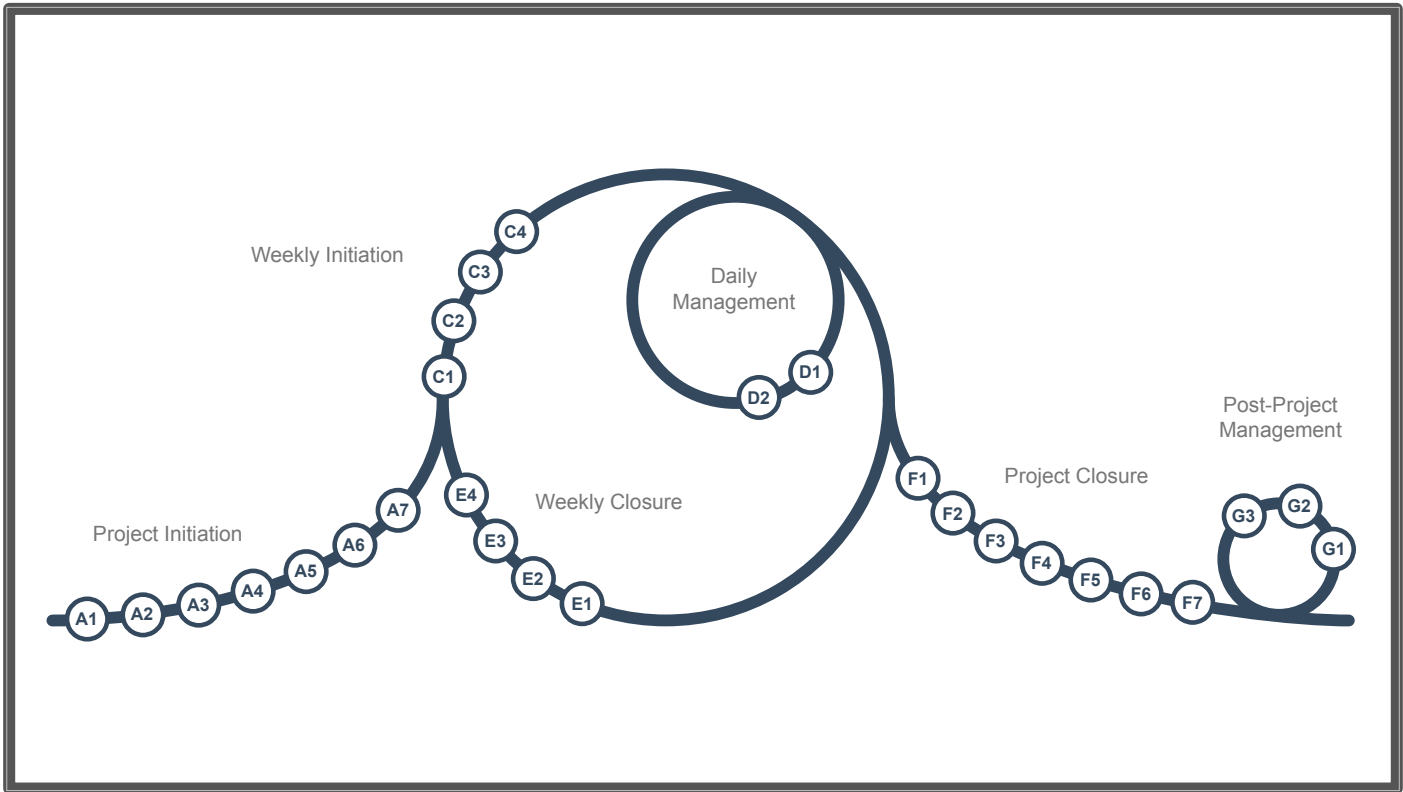
In this setup, we consider micro-projects as those with 1 to 7 people. Please ensure your audience understands that a micro-project can be in any organization, from a tiny micro-organization to mega-corporates. micro.P3.express is designed to work well in all those setups.

It's also helpful to mention that being a micro-project doesn't mean the project is unimportant or not sensitive.

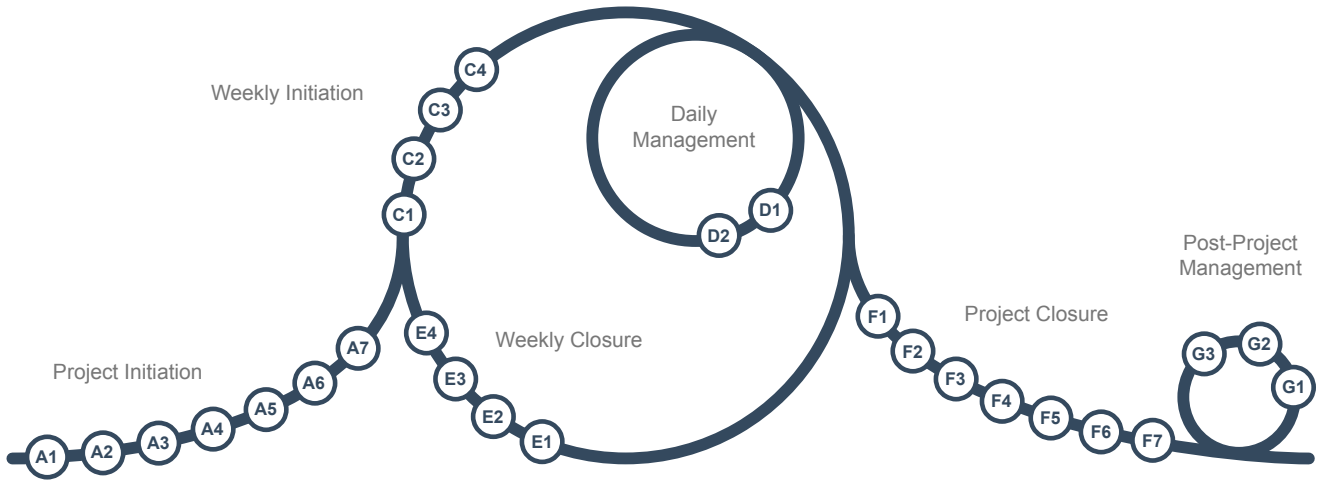


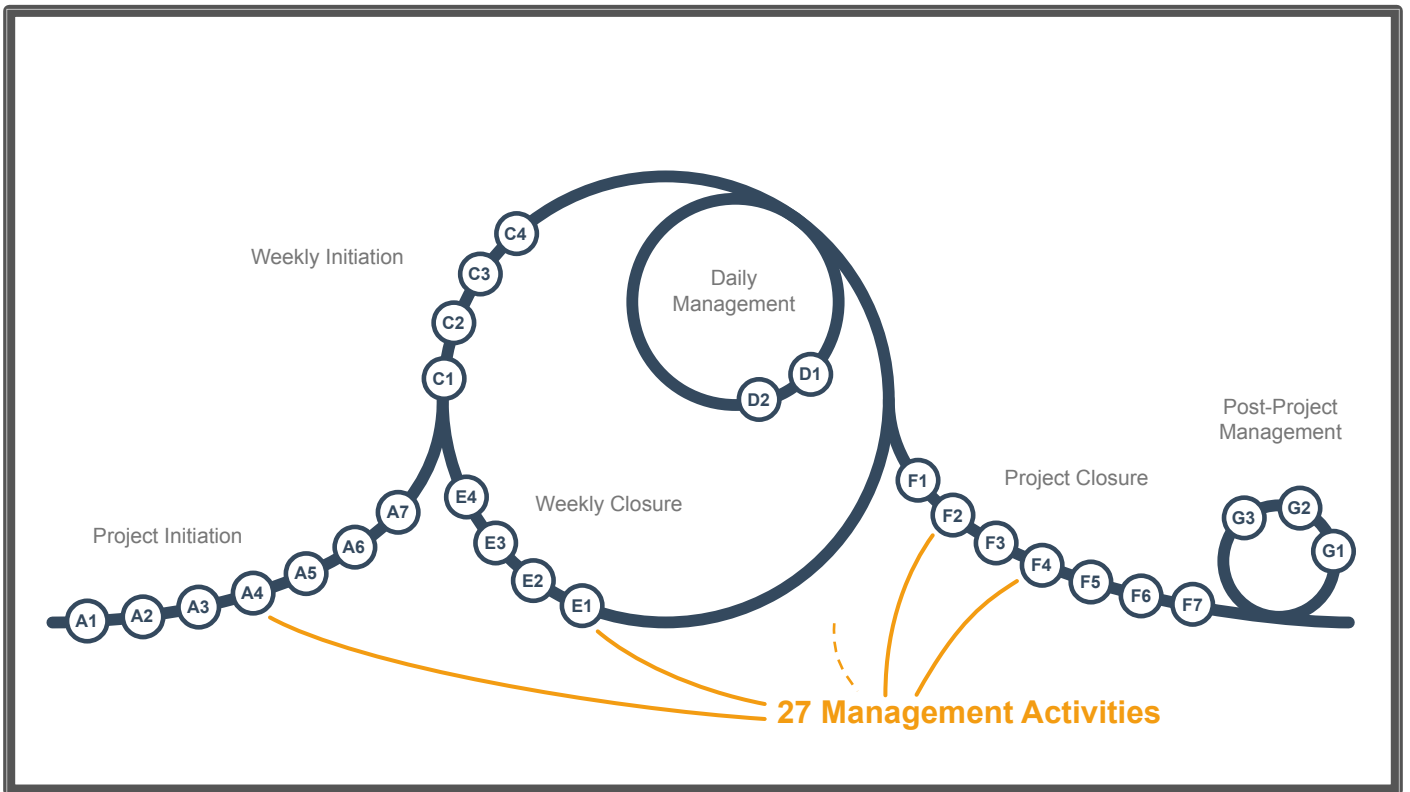
Here are a few important things to tell your audience here:

1. It's "open" (libre, non-proprietary), meaning they can use it without copyright restrictions. Feel free to give them a few examples of how proprietary systems have caused issues for users before and why it's important to have a freedom-respecting system.
2. It's minimalist, meaning that it uses the least number of elements, which in turn, makes it easy to learn, easy to use, and easy to teach. Mention that teaching is key because they will have to teach their teammates, customers, and other people in the organization how their system works.
3. In case of questions: It's a methodology rather than a guide.



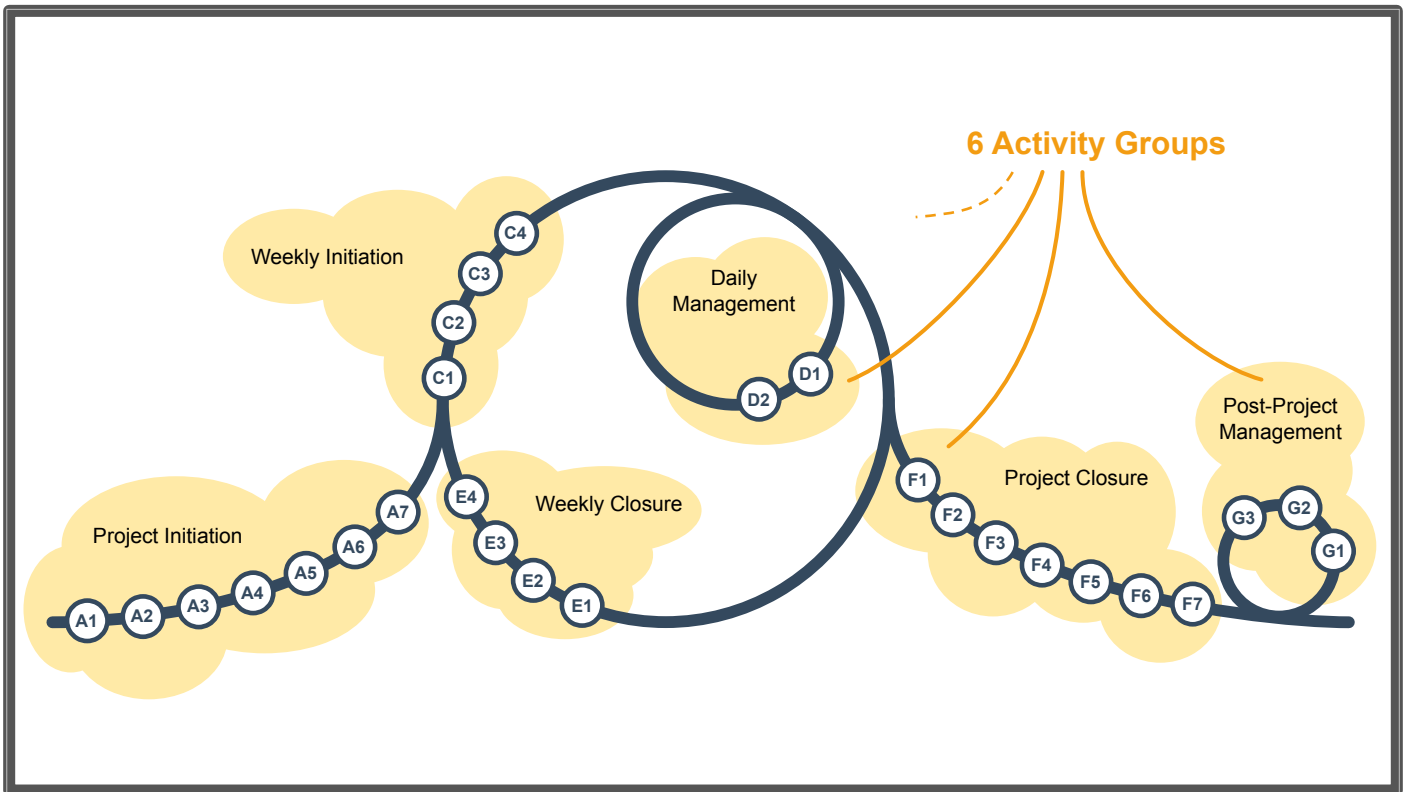
# The Process

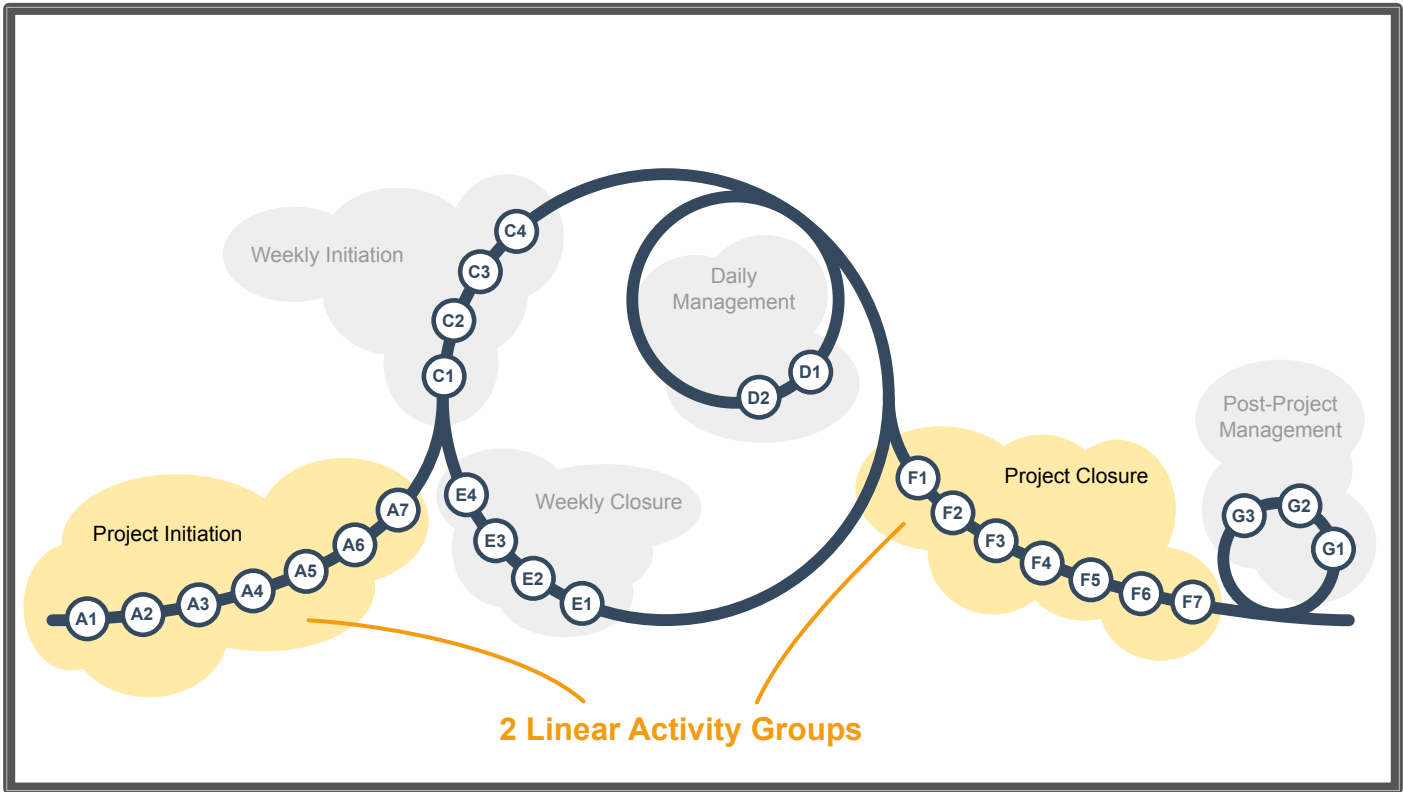


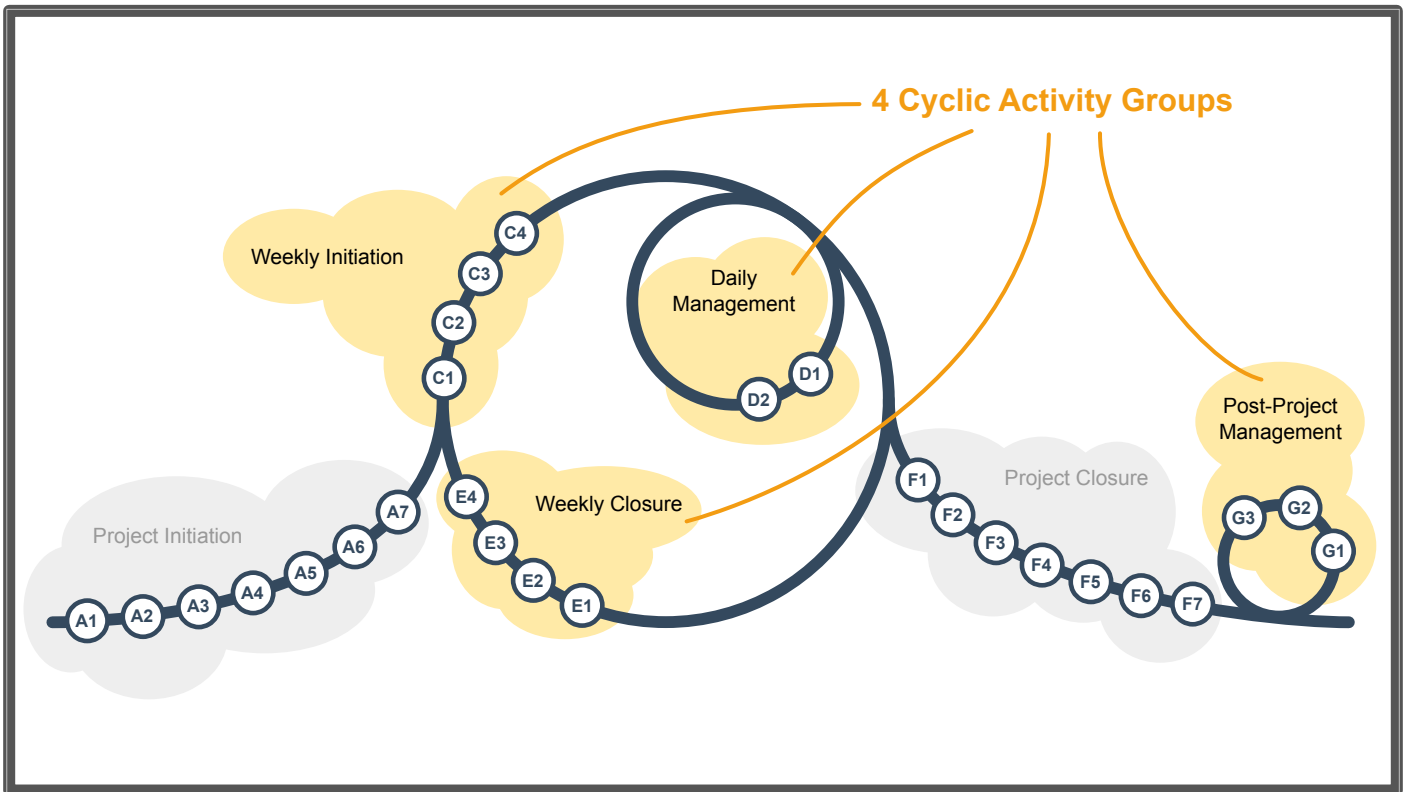


Remind them that we are focused on the management activities, and in parallel, there are many production activities as well.

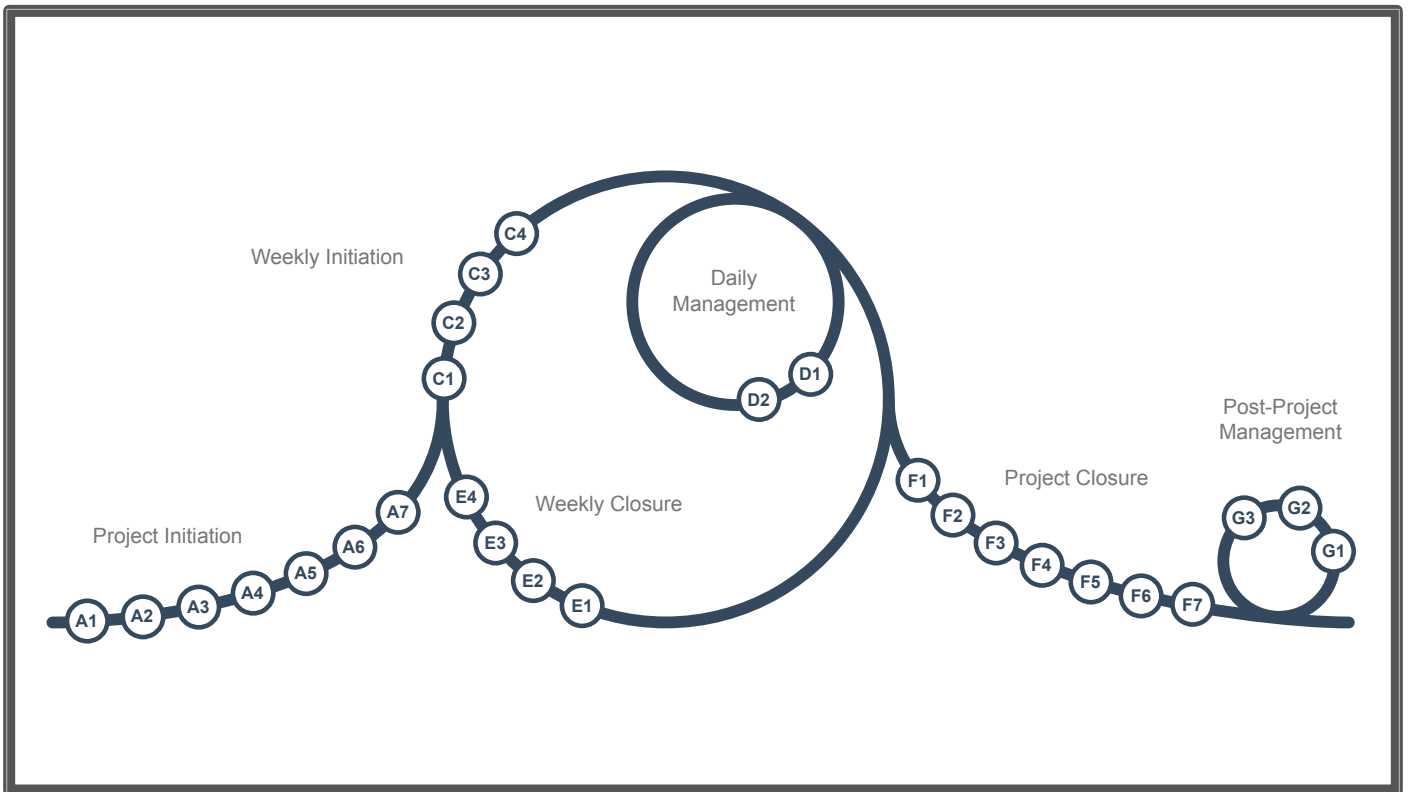








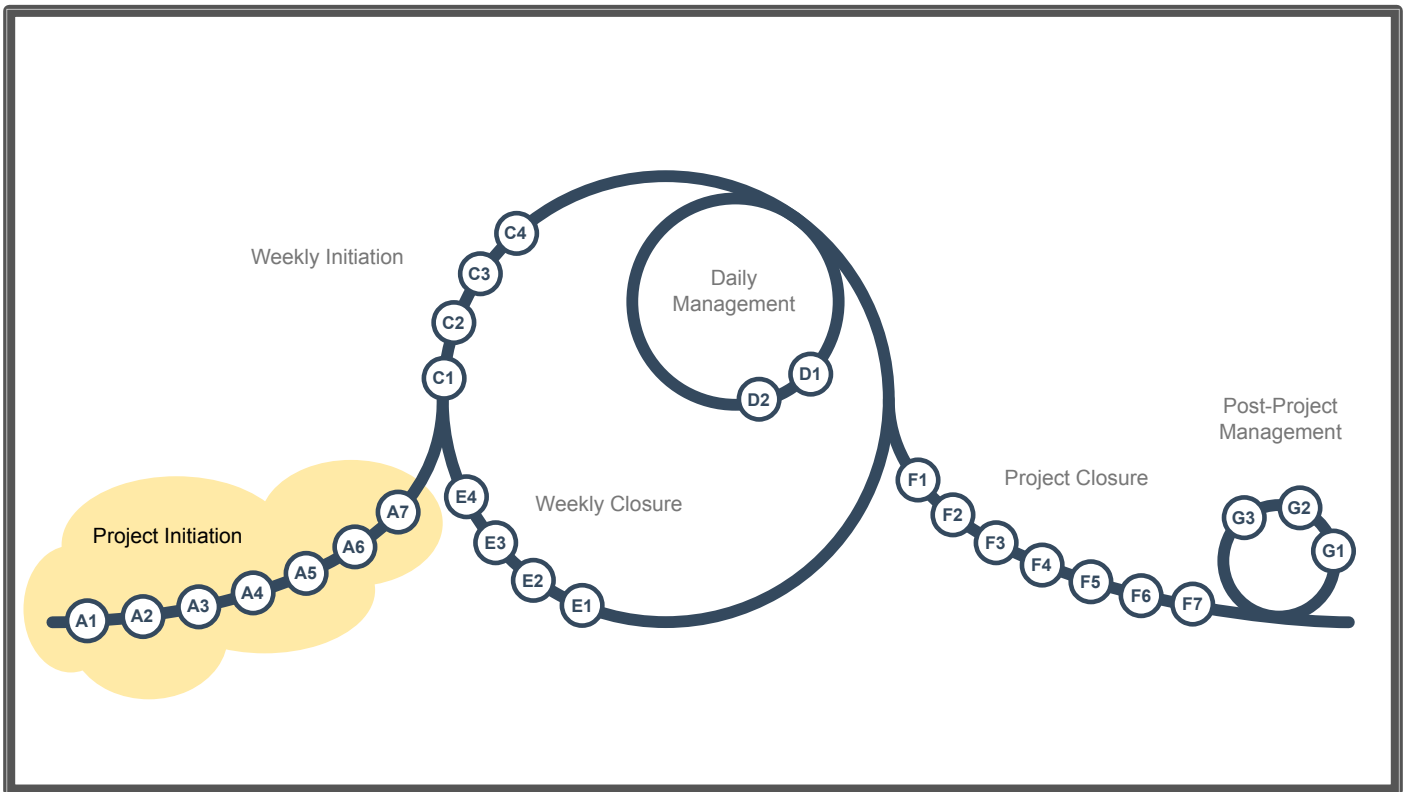
In case you had questions about it, having cycles doesn't mean it's Agile. micro.P3.express is neither Agile nor predictive because it's about project management rather than product development. However, it's designed to be compatible with both Agile and predictive methods.



The high-level overview section doesn't go through the activity groups in order but follows this structure:

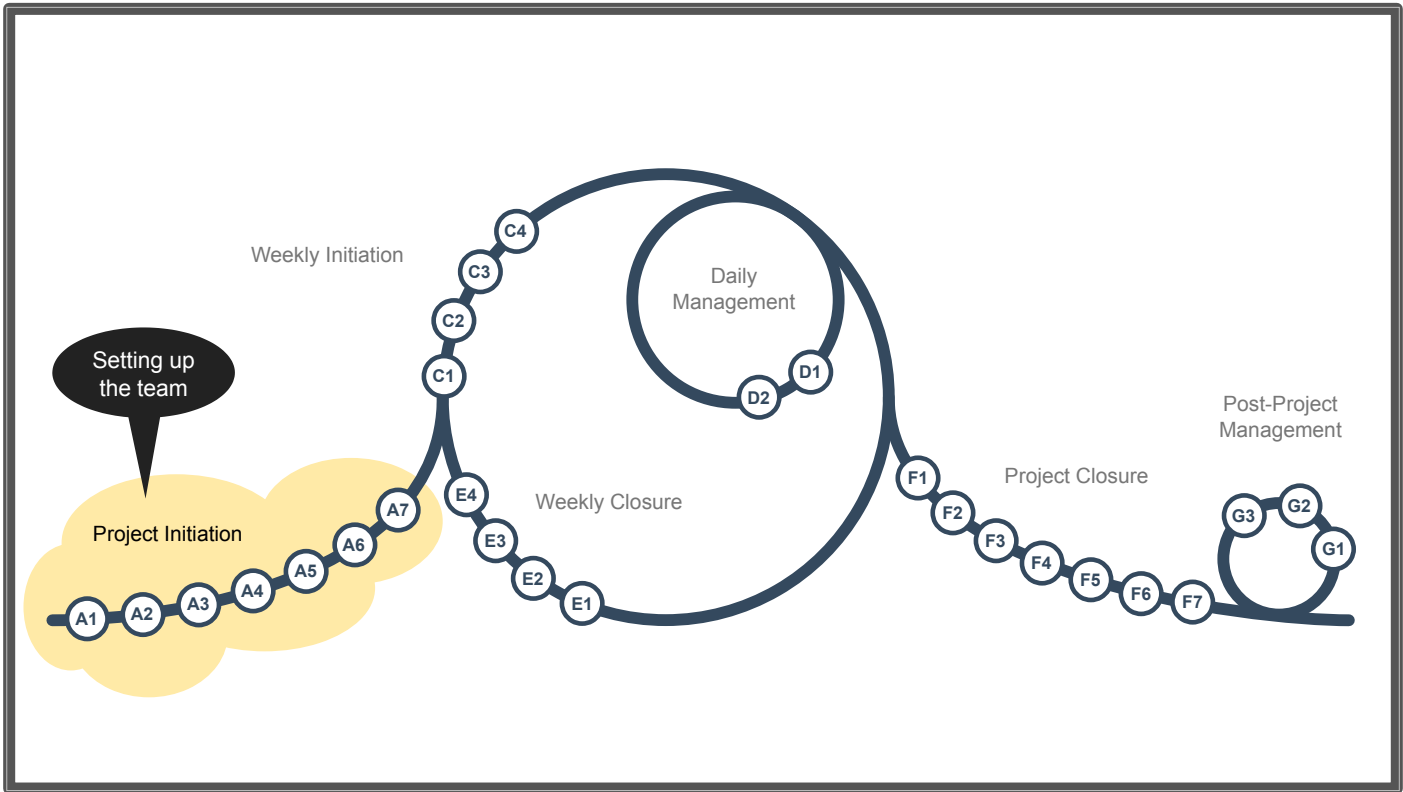
1. We have an initiation and a closure for the whole project.
2. While working on the project, we have weekly cycles, each with its own initiation and closure.
3. Finally, there are also a few daily activities.
4. We even have a cycle for after the project is ended.

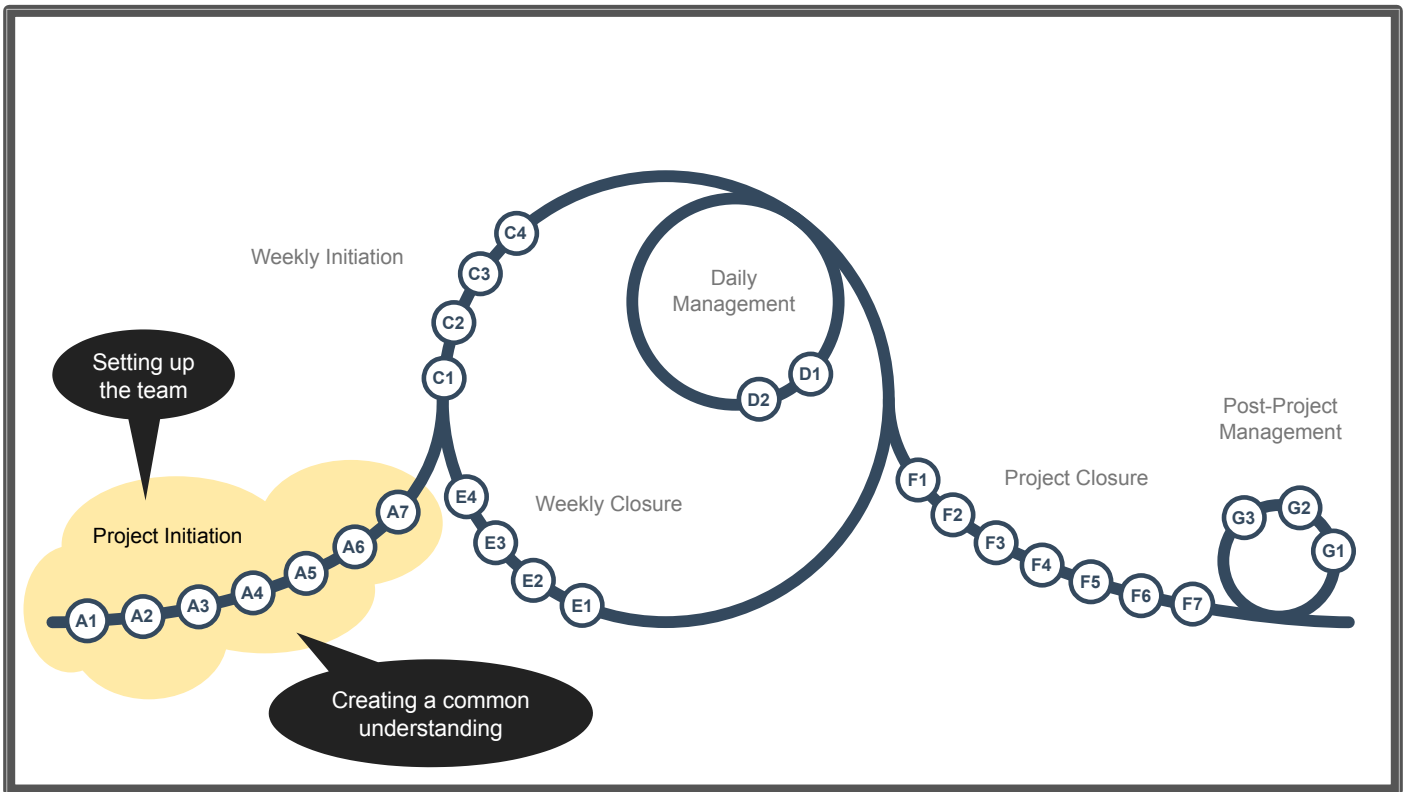
The order for #1 and #2 helps present it like a self-similar fractal, which can be easier to remember.

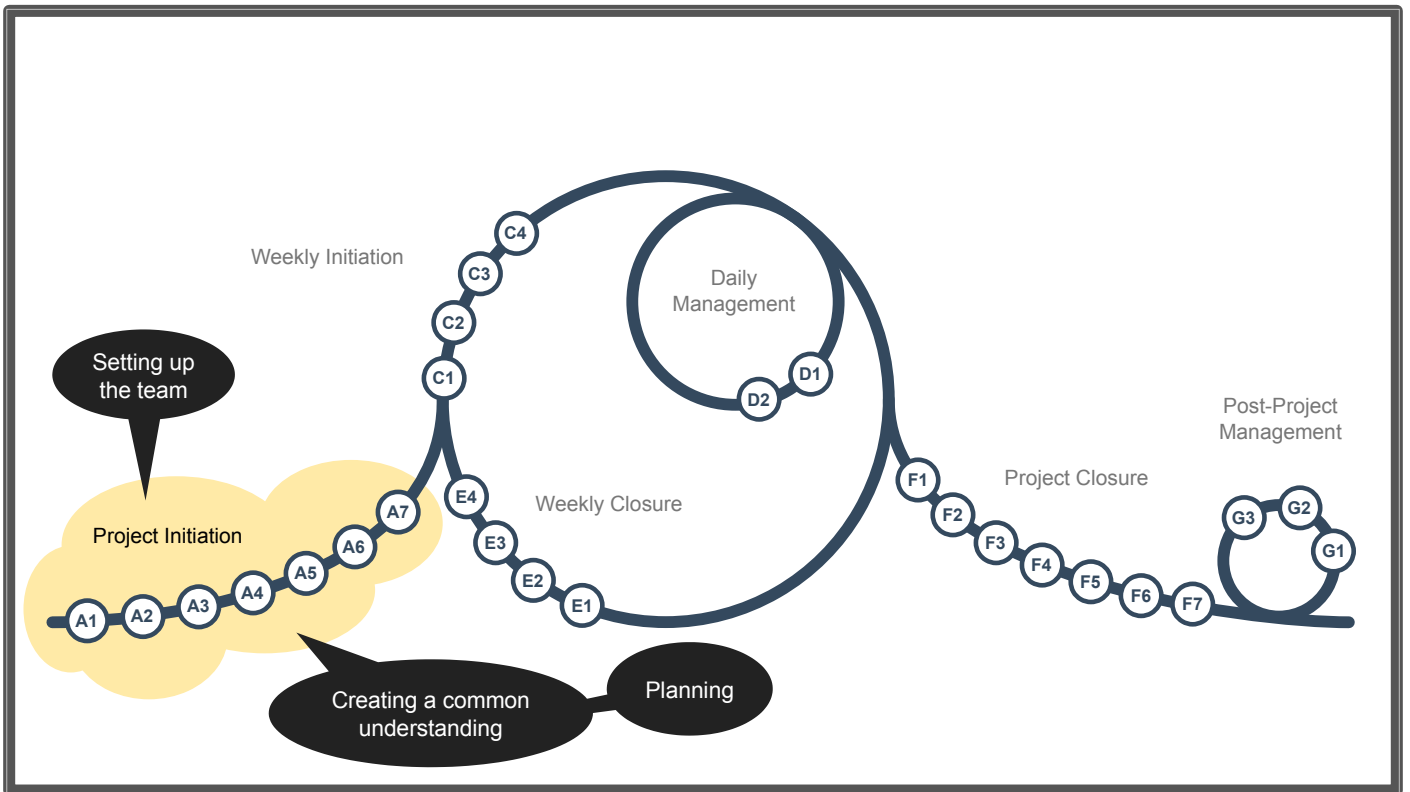


Just give them an idea of what it means to initiate a project without going through the details.

Since there are two initiations and two closures, it's best to always refer to them by their full names: "Project Initiation" and "Weekly Initiation" rather than just "Initiation". Use "initiations" to refer to both of them.

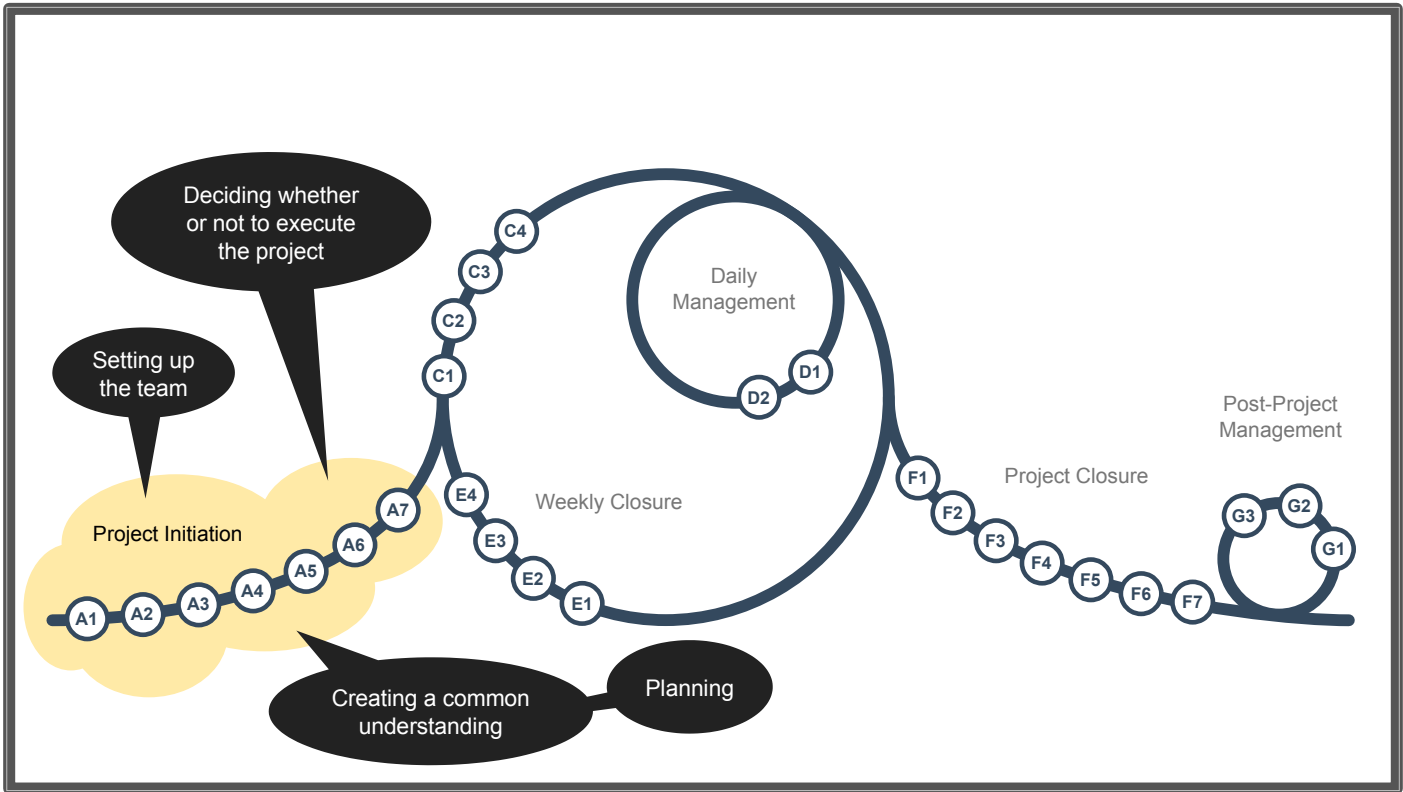


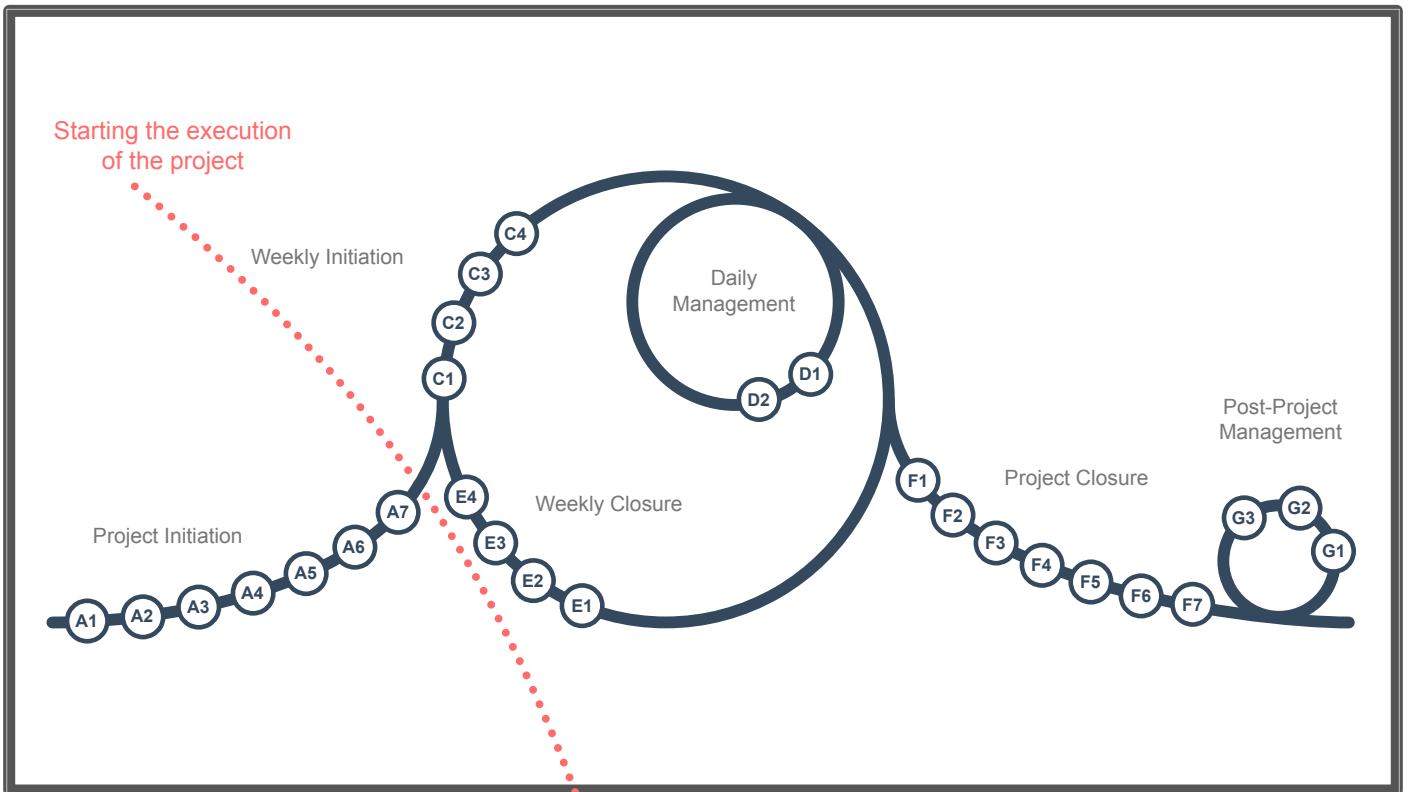




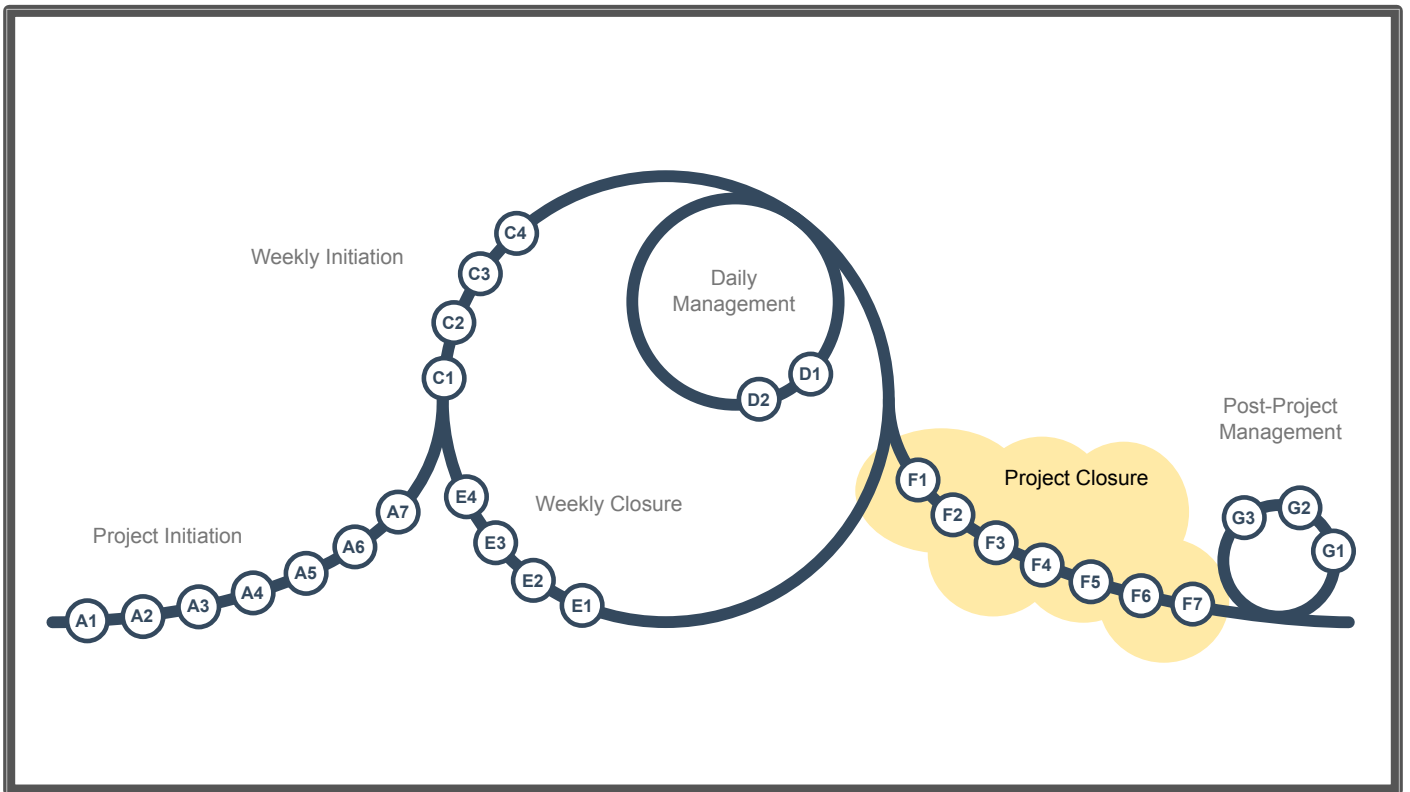
Creating a common understanding is the outcome, and we do it by creating a plan.



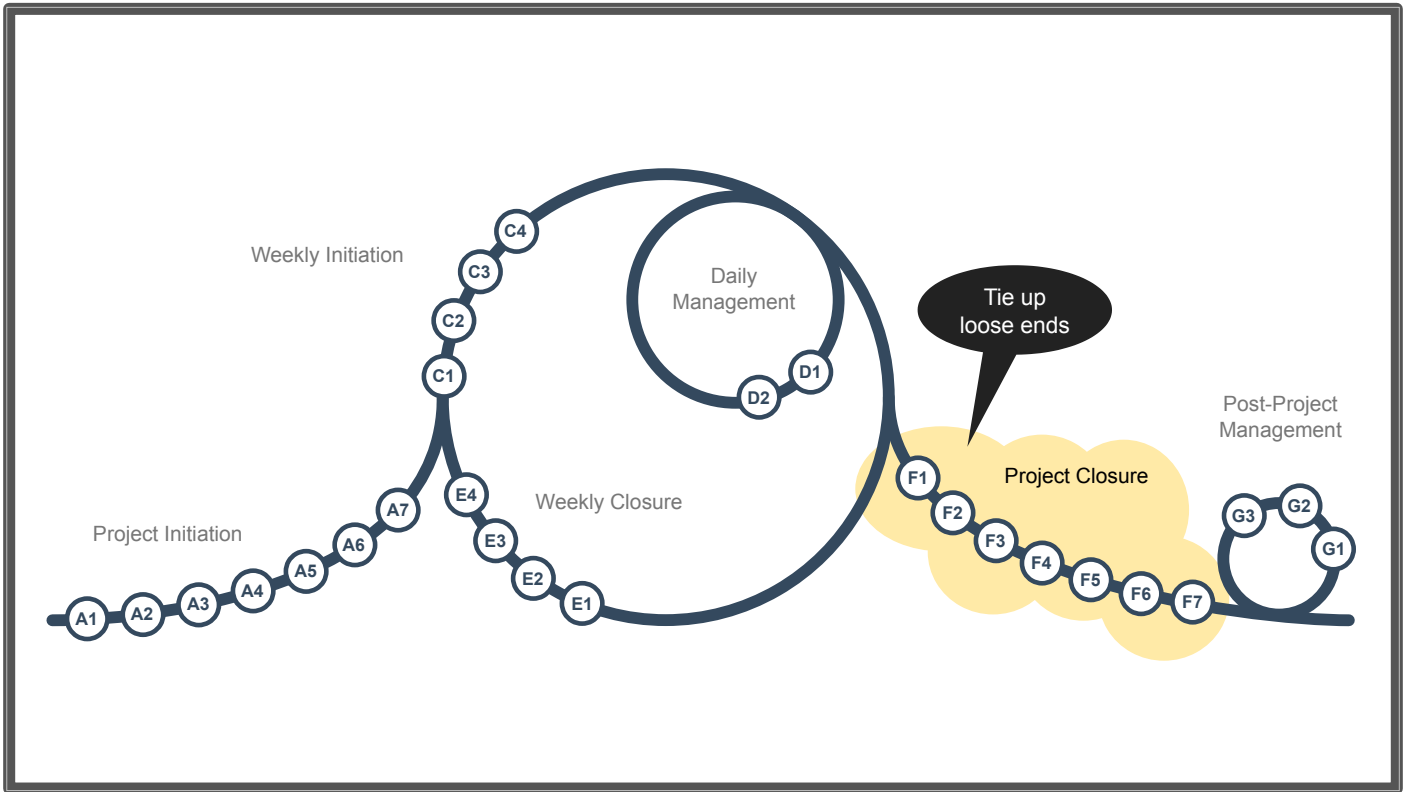


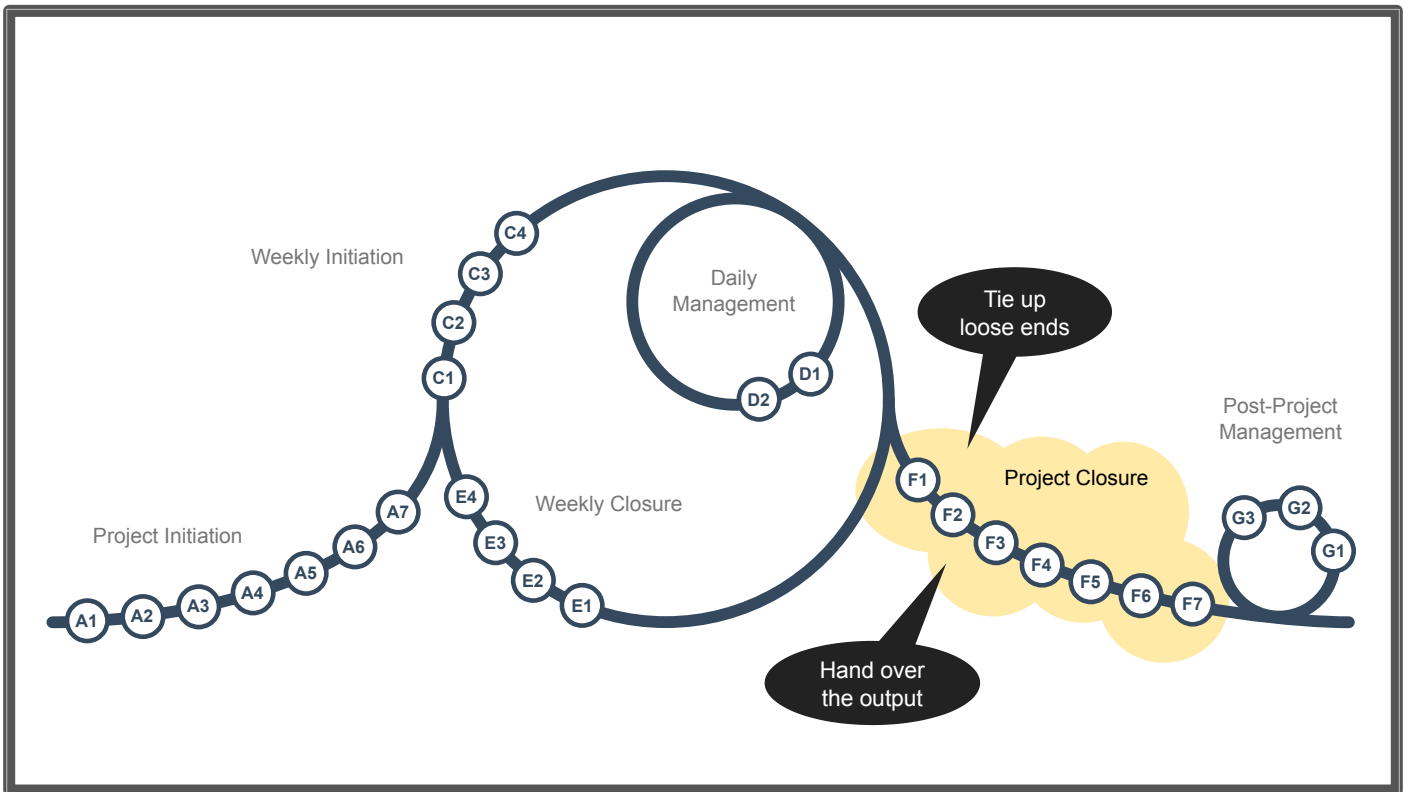


Ensure they understand that deciding whether or not to execute the project is part of Project Initiation. In other words, we're not sure whether or not to execute the project yet when we're initiating it.

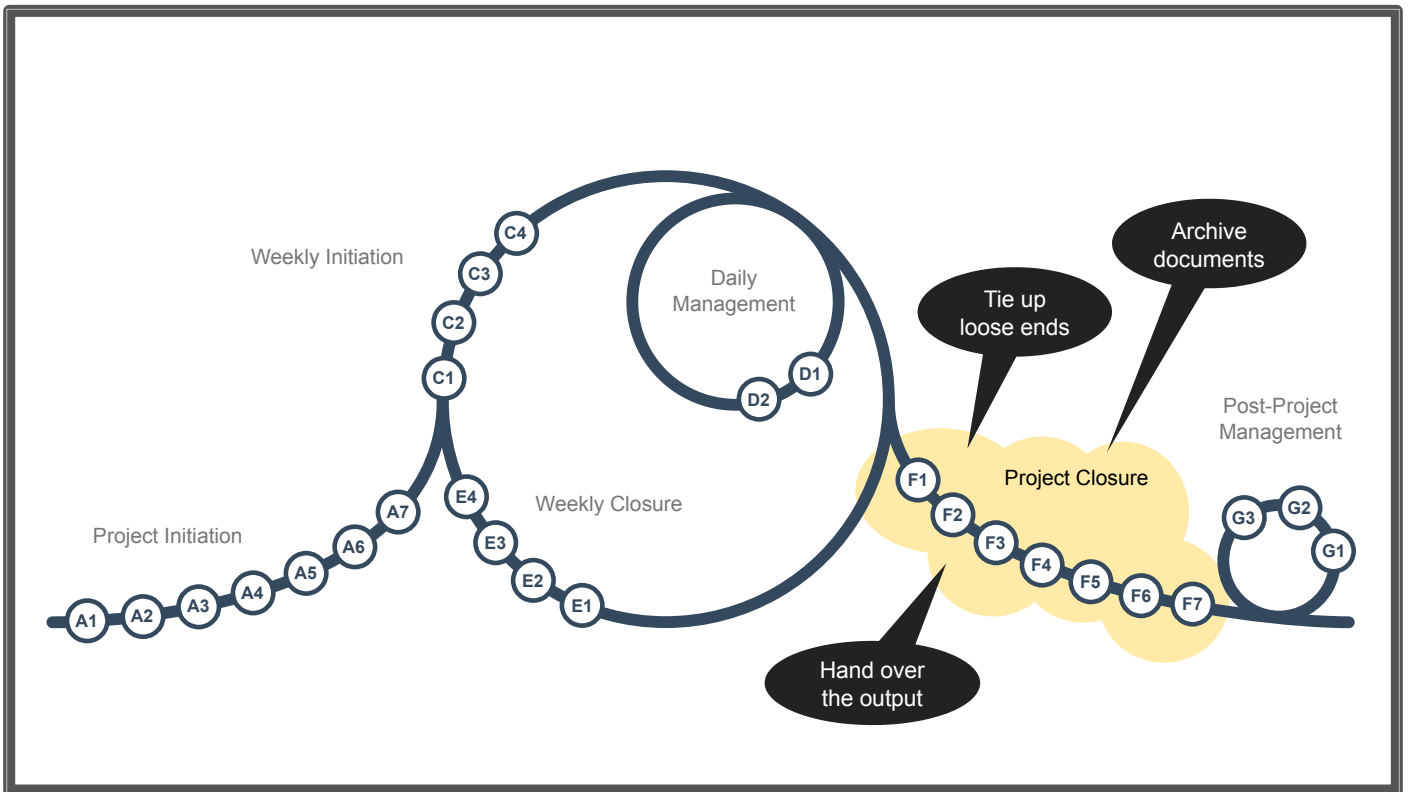


Just give them an idea of what it means to close the project without going through the details.

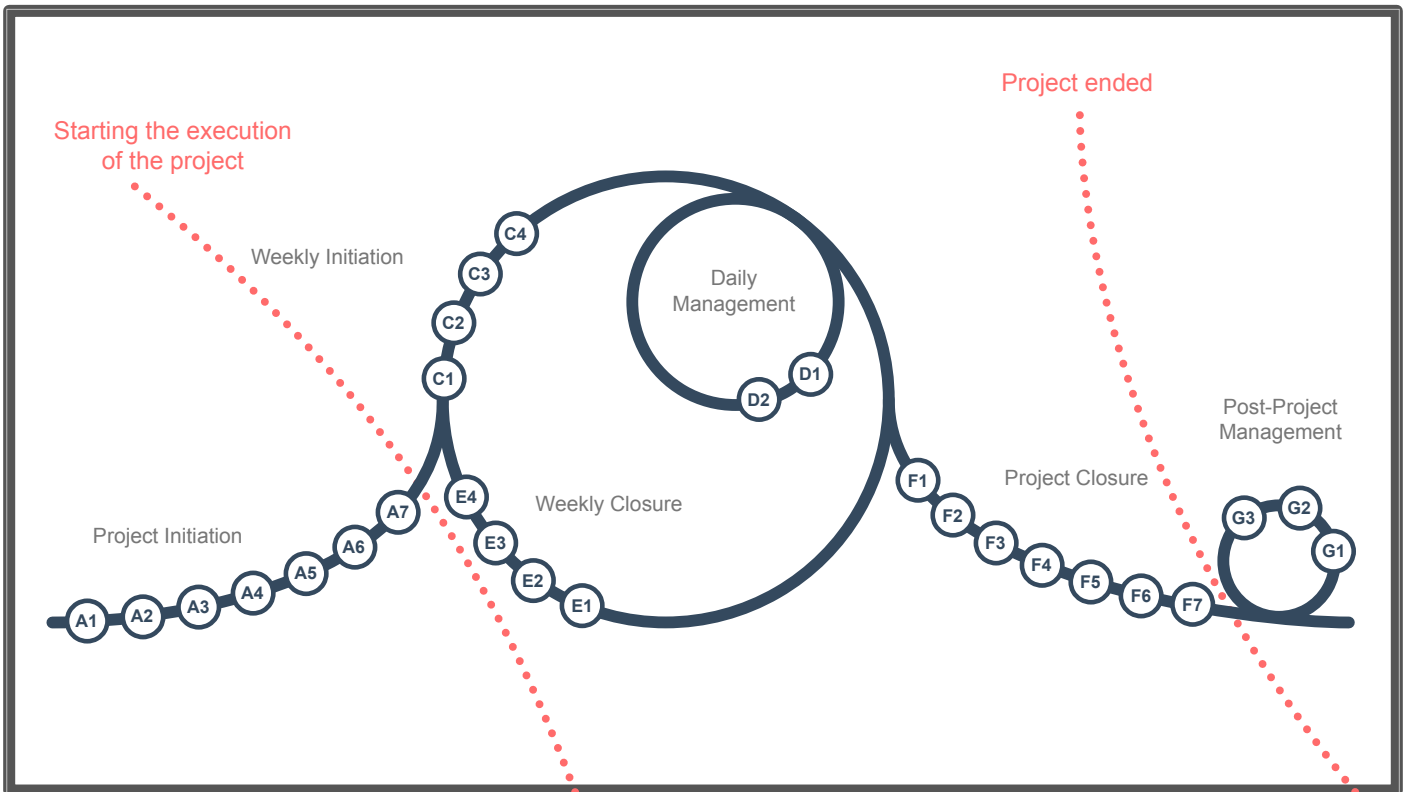




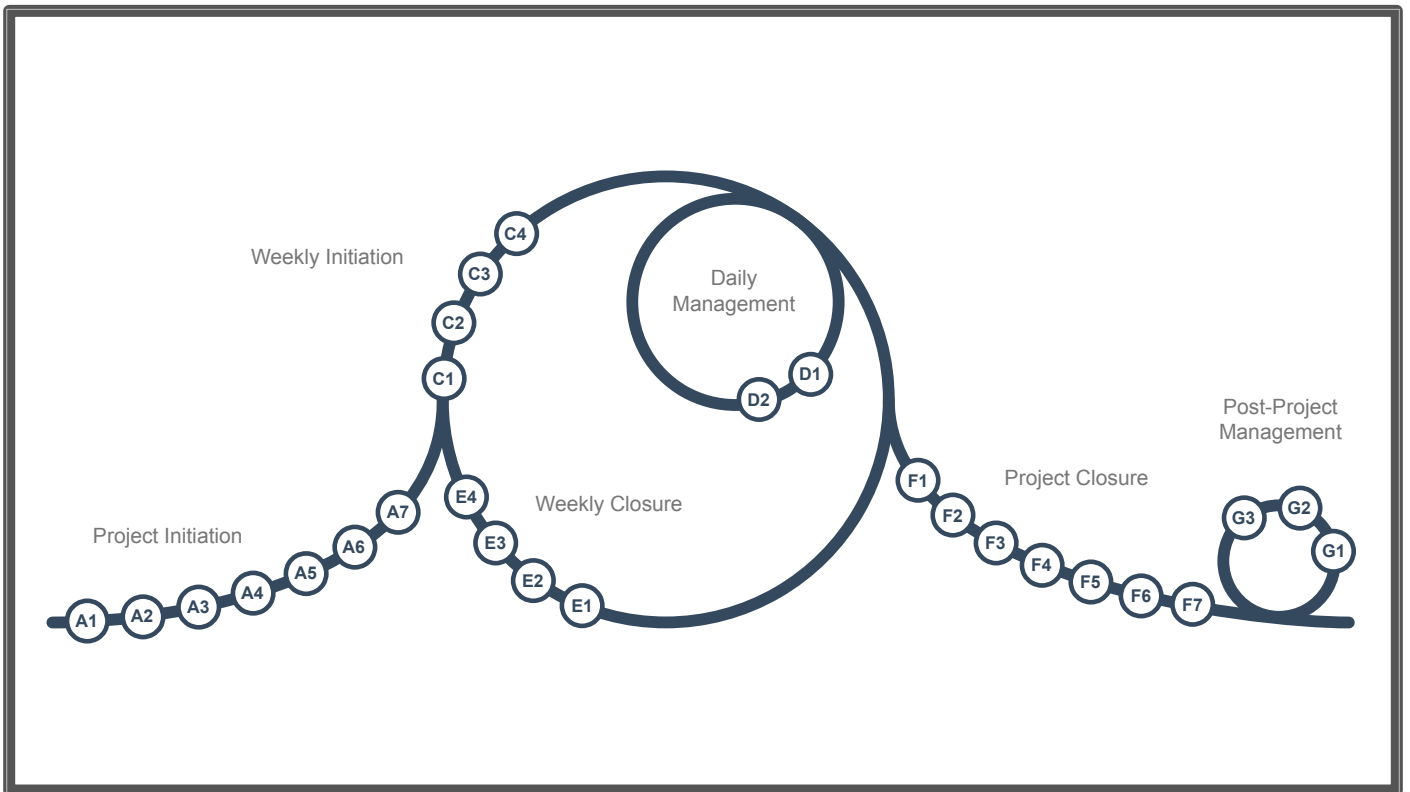
You may need to explain the handover concept a little. You can give them the example of renovating a house, and that handing over means that you're not allowed to go there at your will anymore, you're not responsible for securing it anymore, etc.



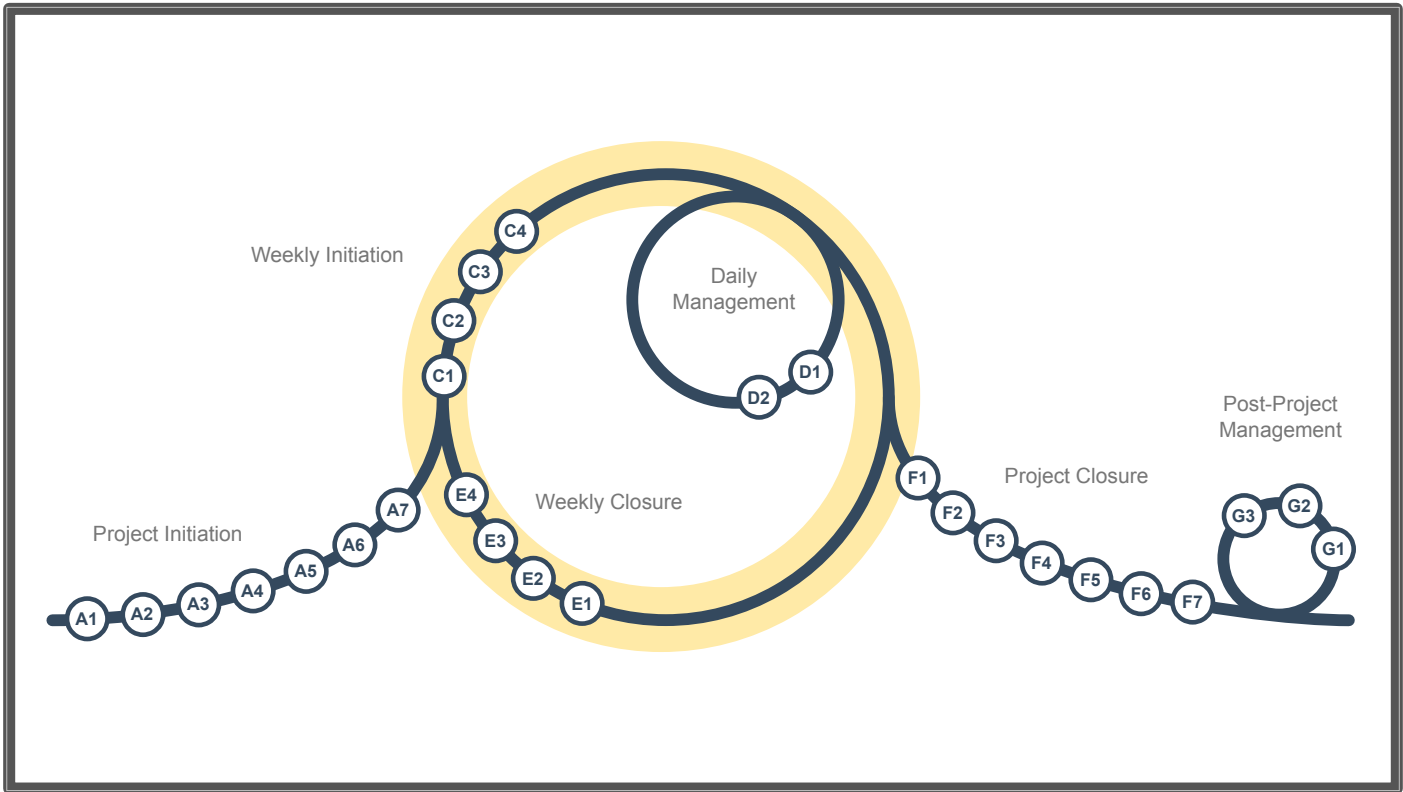
Mention that archiving documents is essential. We'll talk about its details later.

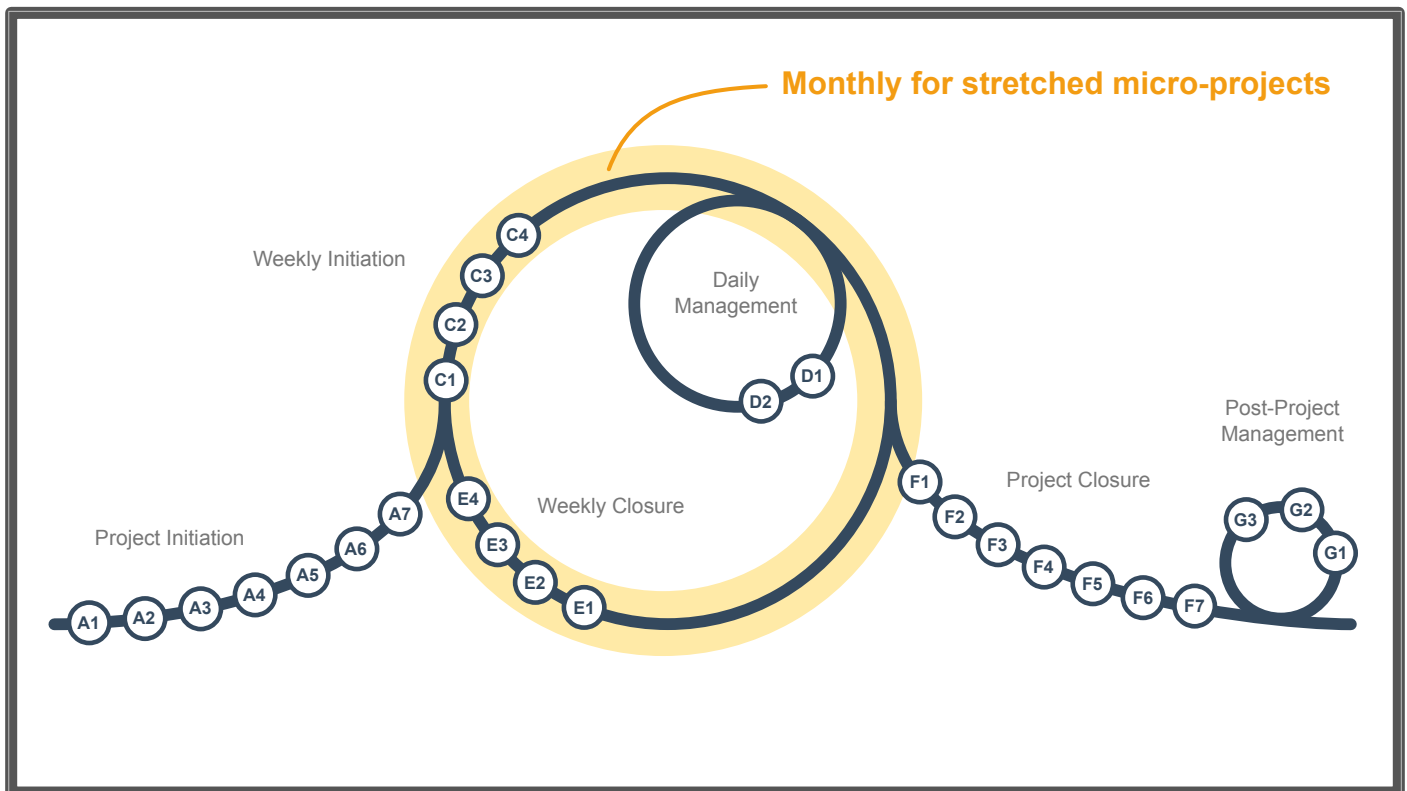


Make sure they understand that the project is finished at the end of Project Closure, even though we have another cycle after it.



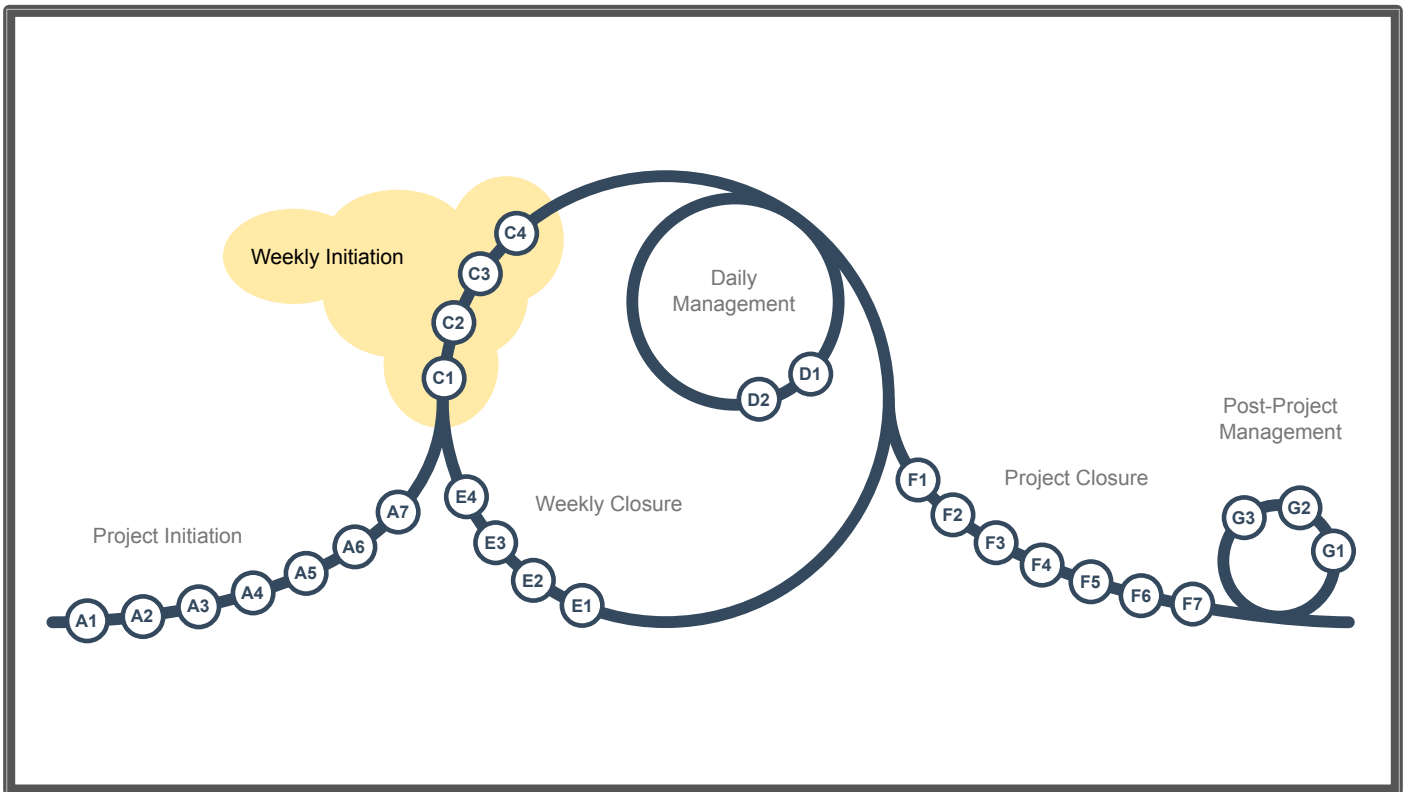




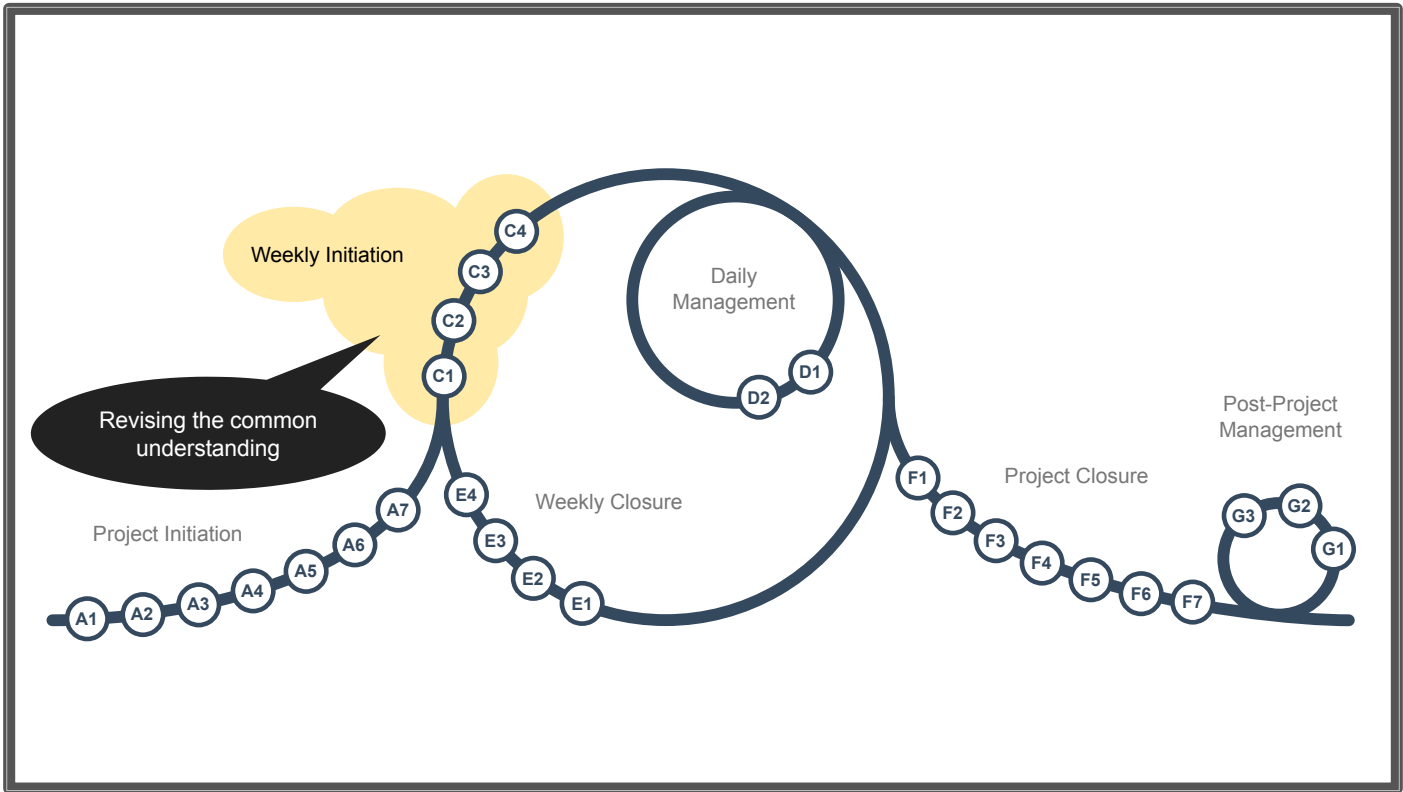


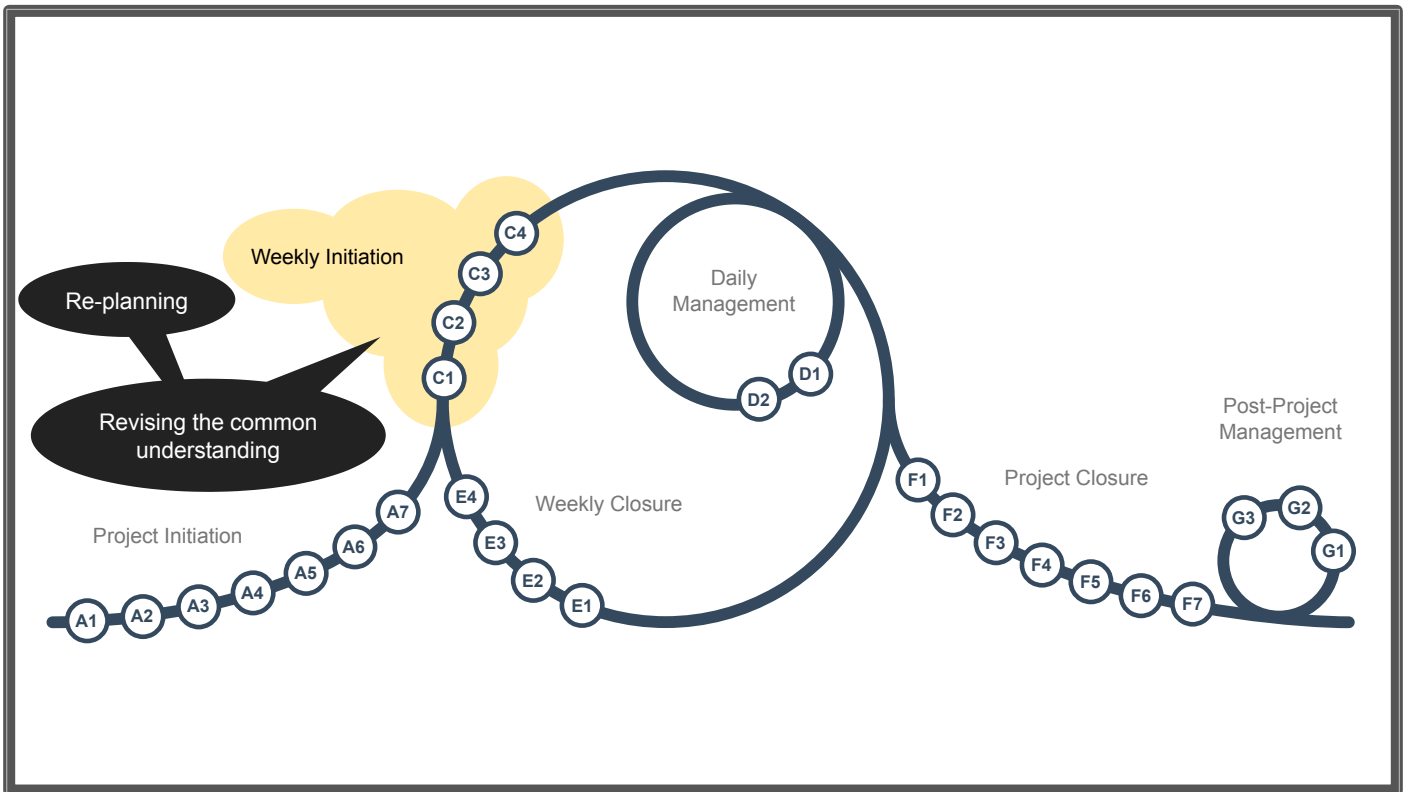
Normally, this cycle is weekly, but it can be monthly for **stretched** micro-projects. These projects stretch over a long time (e.g., 2 years) and only take a small portion of the team members' time.

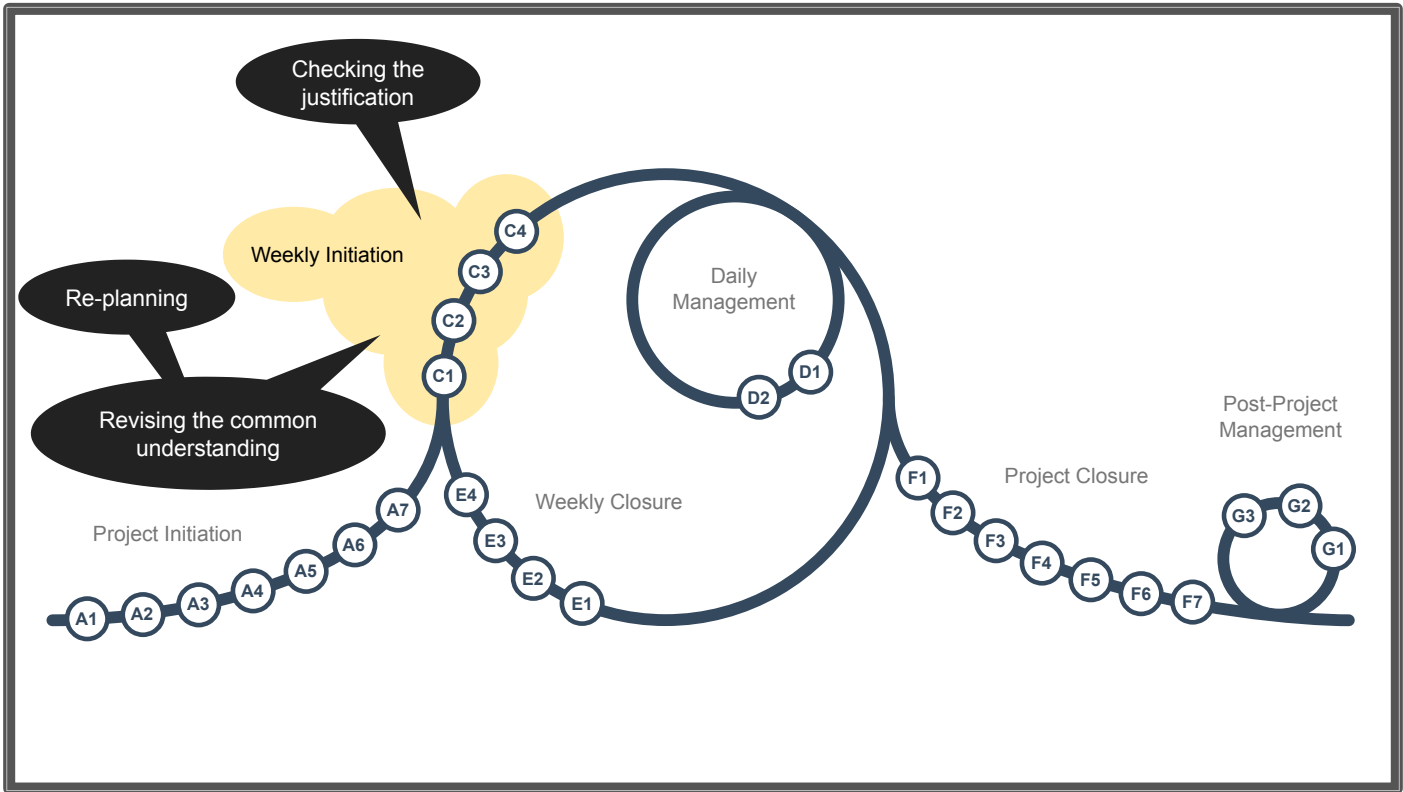
We generally prefer to avoid stretched projects and instead prefer to focus on a few projects and finish them as soon as possible. However, sometimes we can't prevent stretched projects because of external conditions.

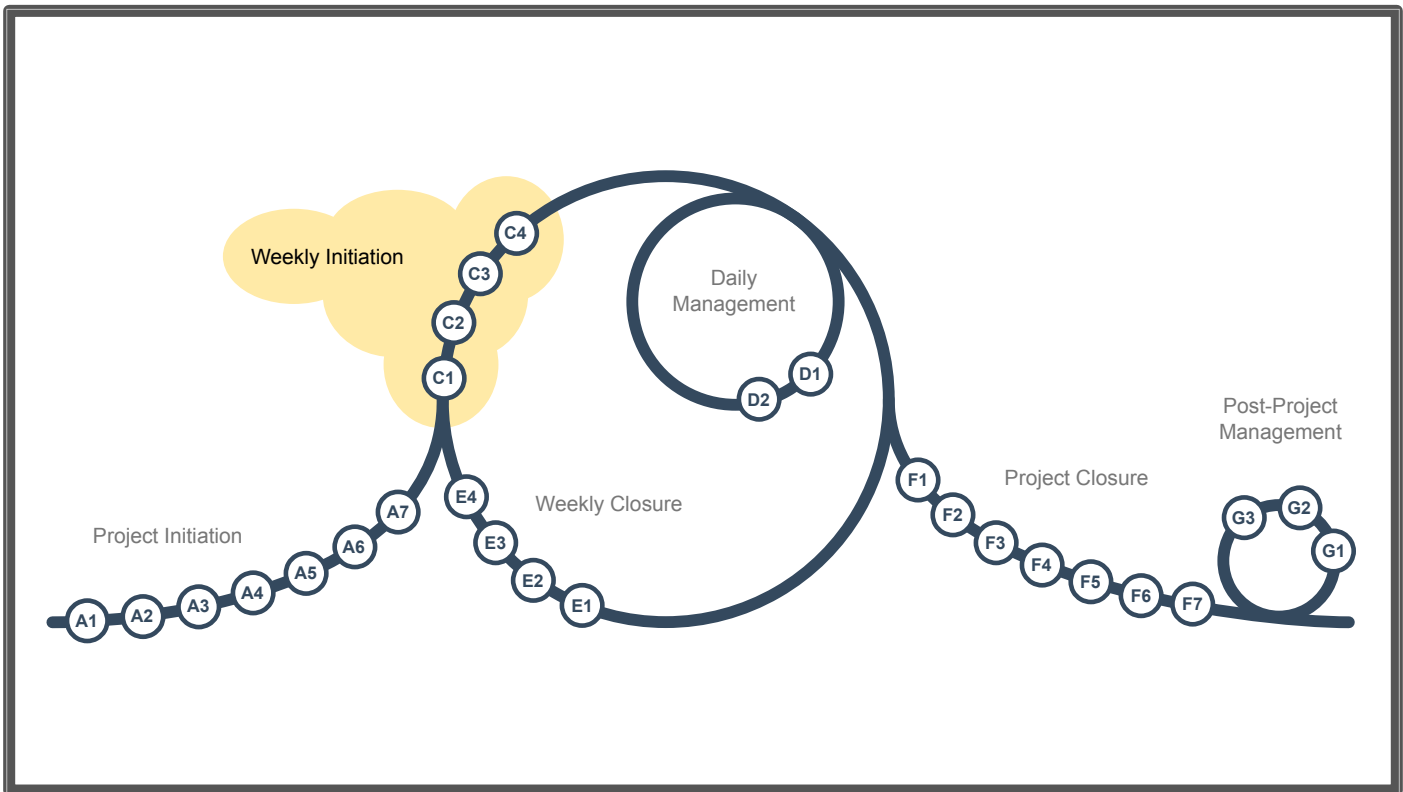


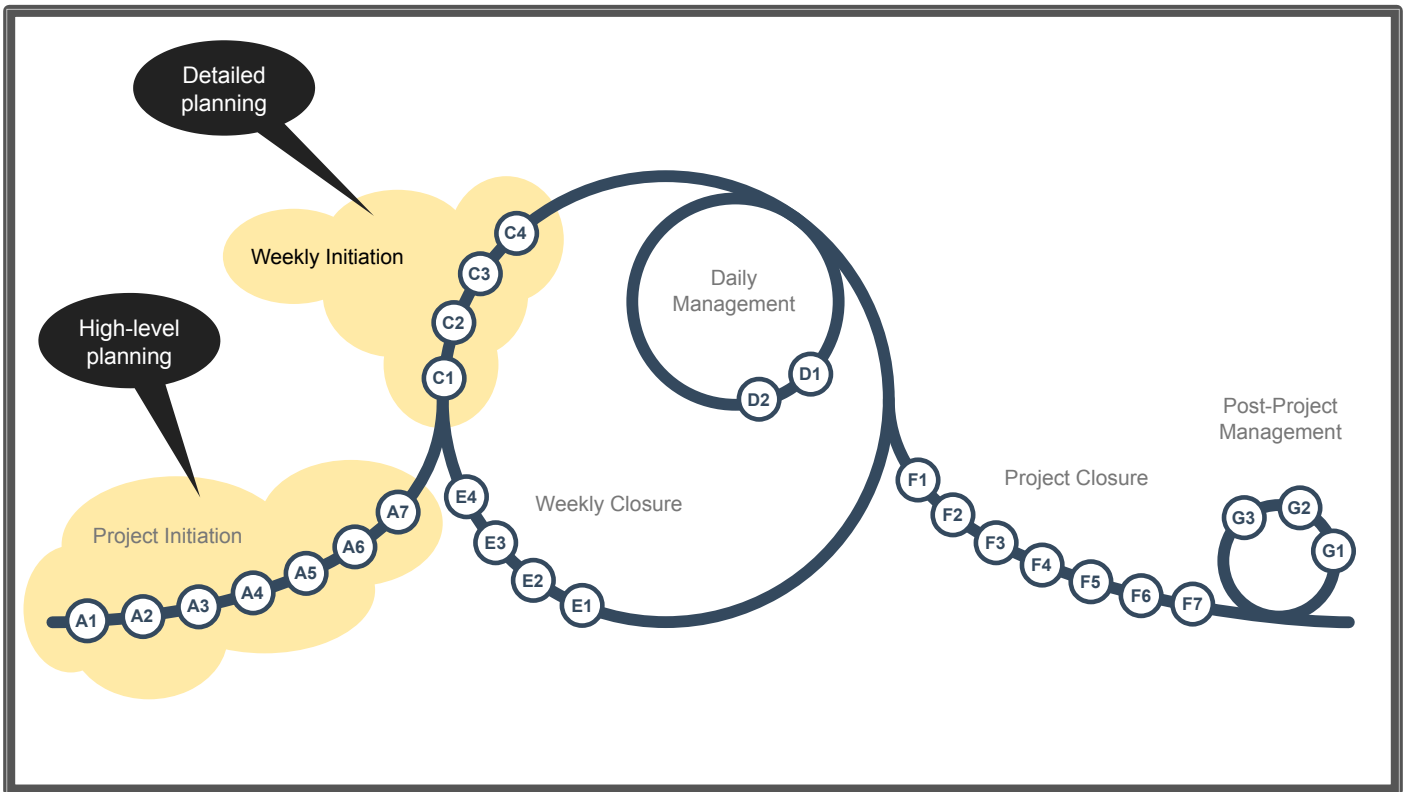
Just give them an idea of what Monthly Initiation is without going through the details.







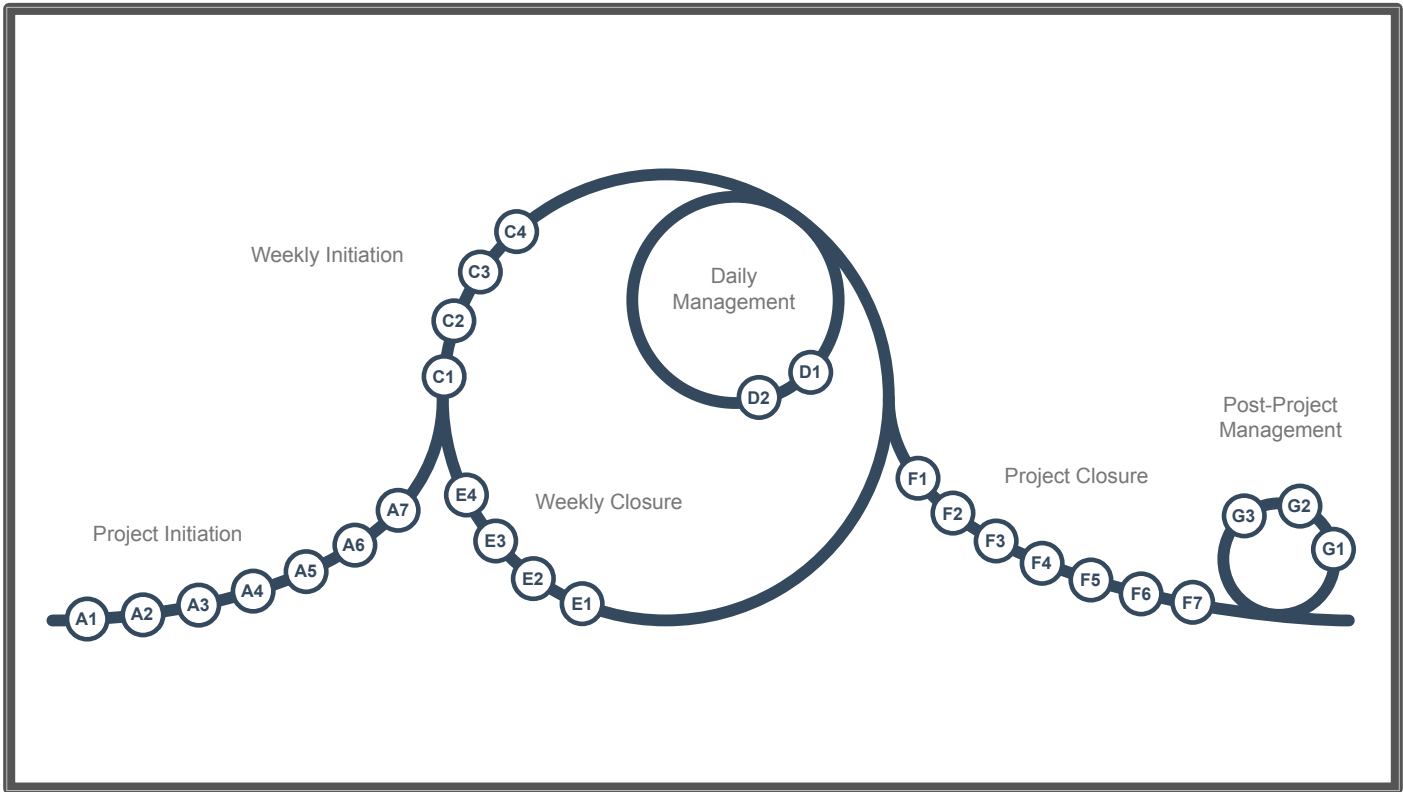


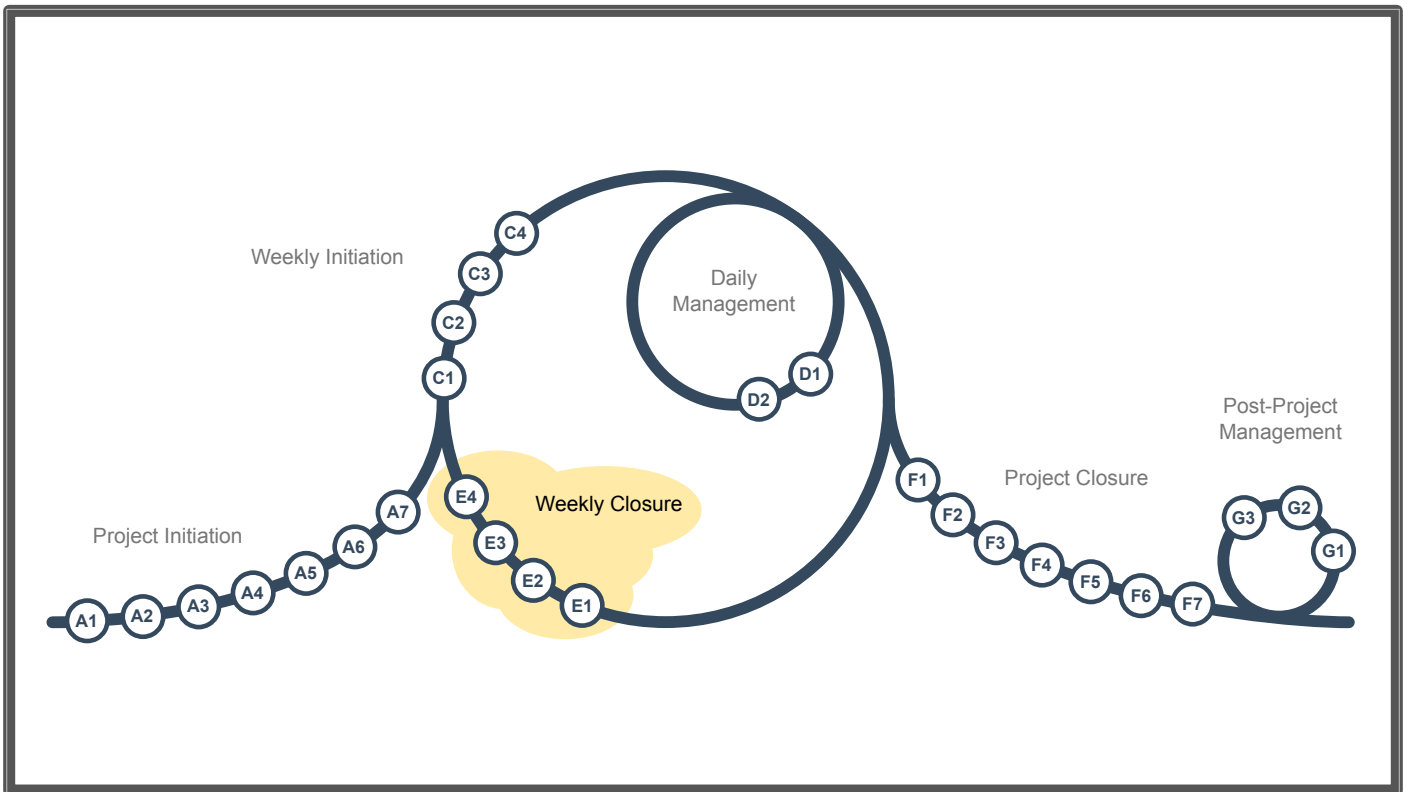


Tell them a little about the planning concept in micro.P3.express, which is similar to P3.express: When possible, we prefer to have a high-level plan upfront (Project Initiation) and then details it in each cycle (Weekly Initiation).

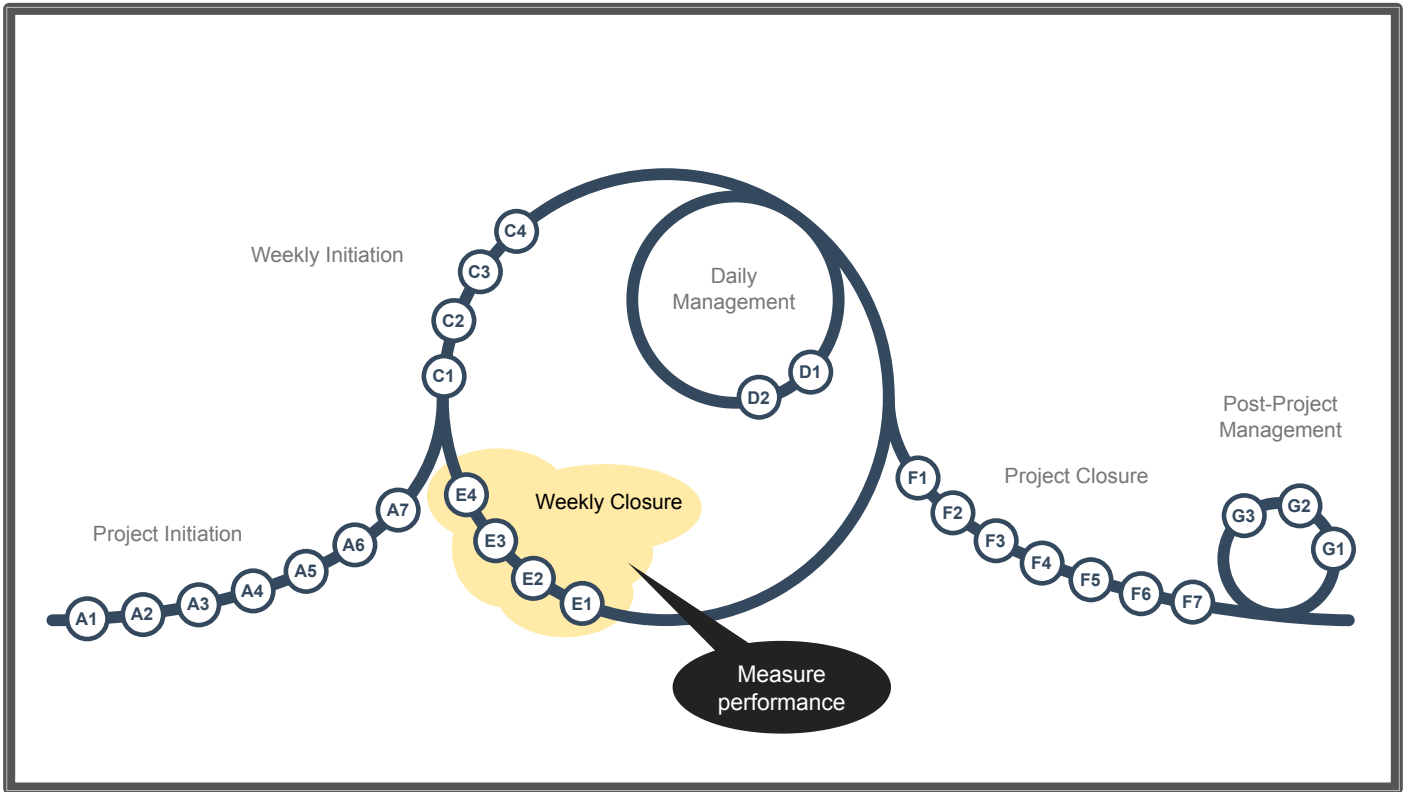
Some projects really need detailed upfront plans, and in those cases, we can have one. However, we still revise and refine the plan in every Weekly Initiation.

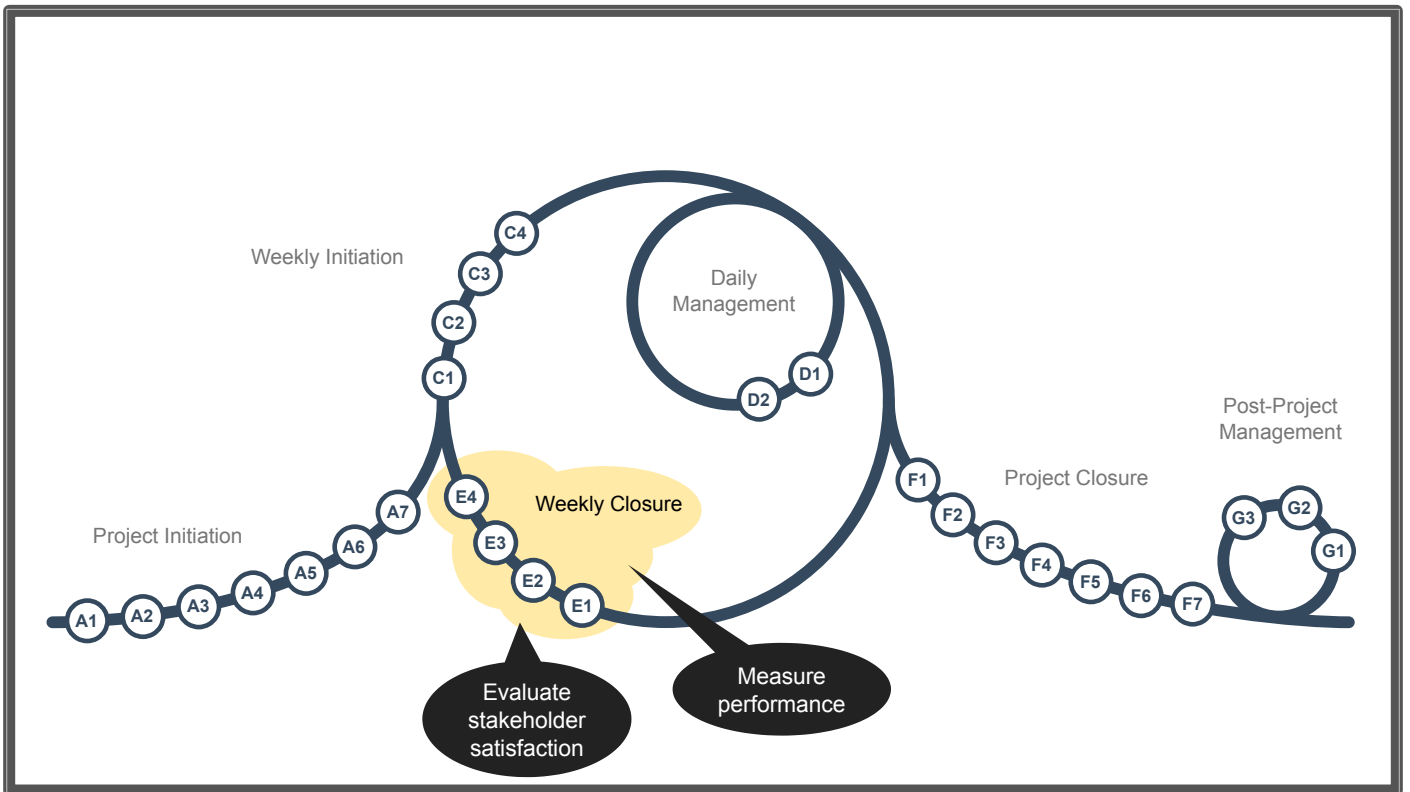


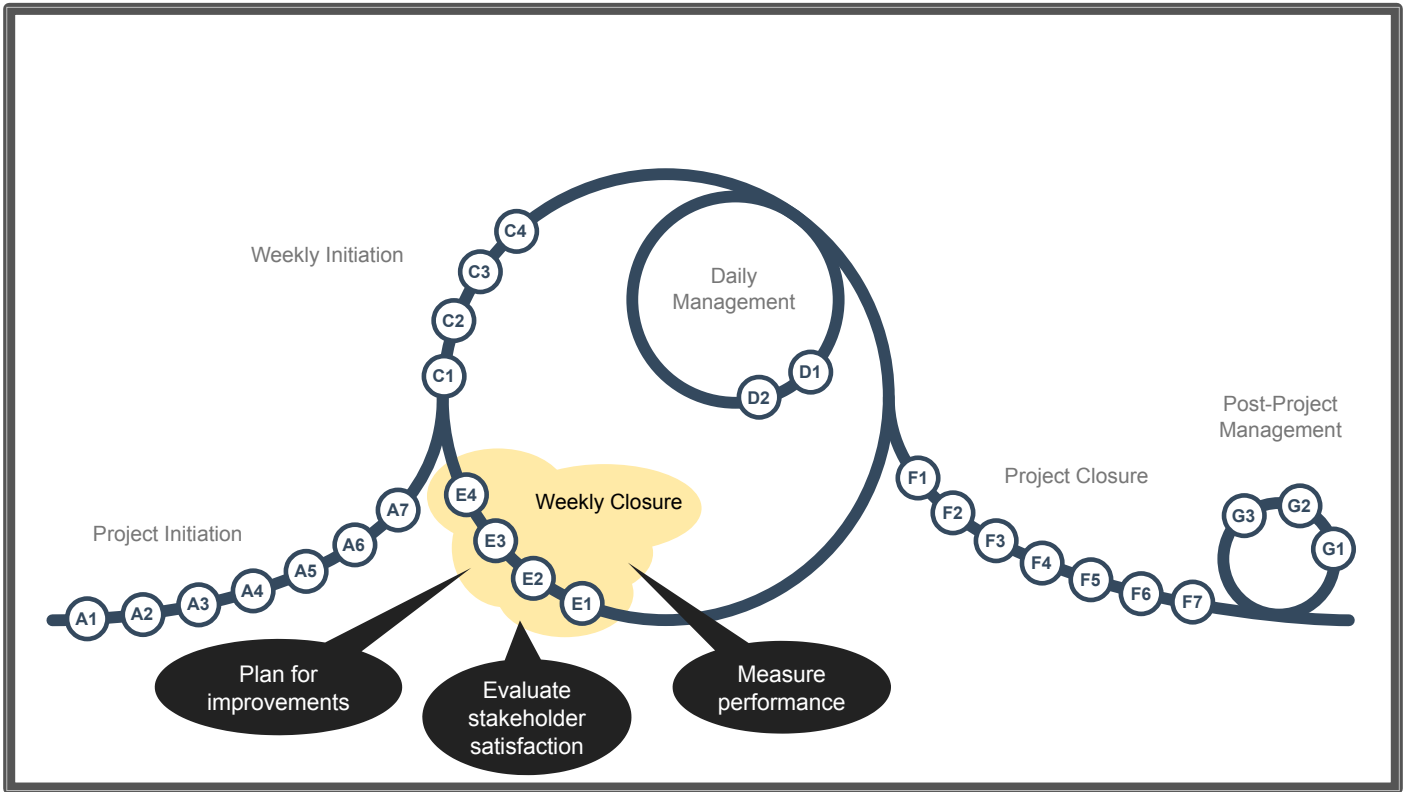


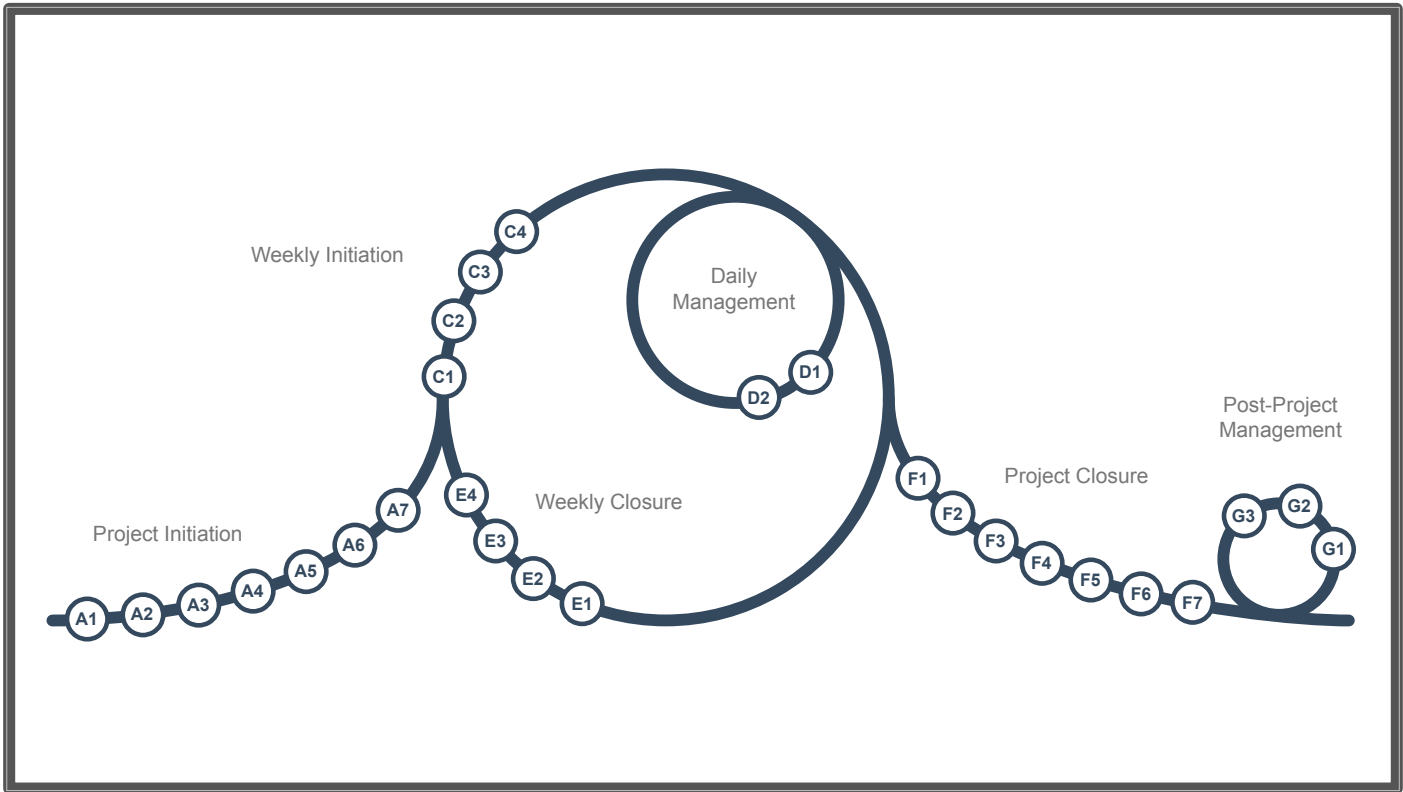


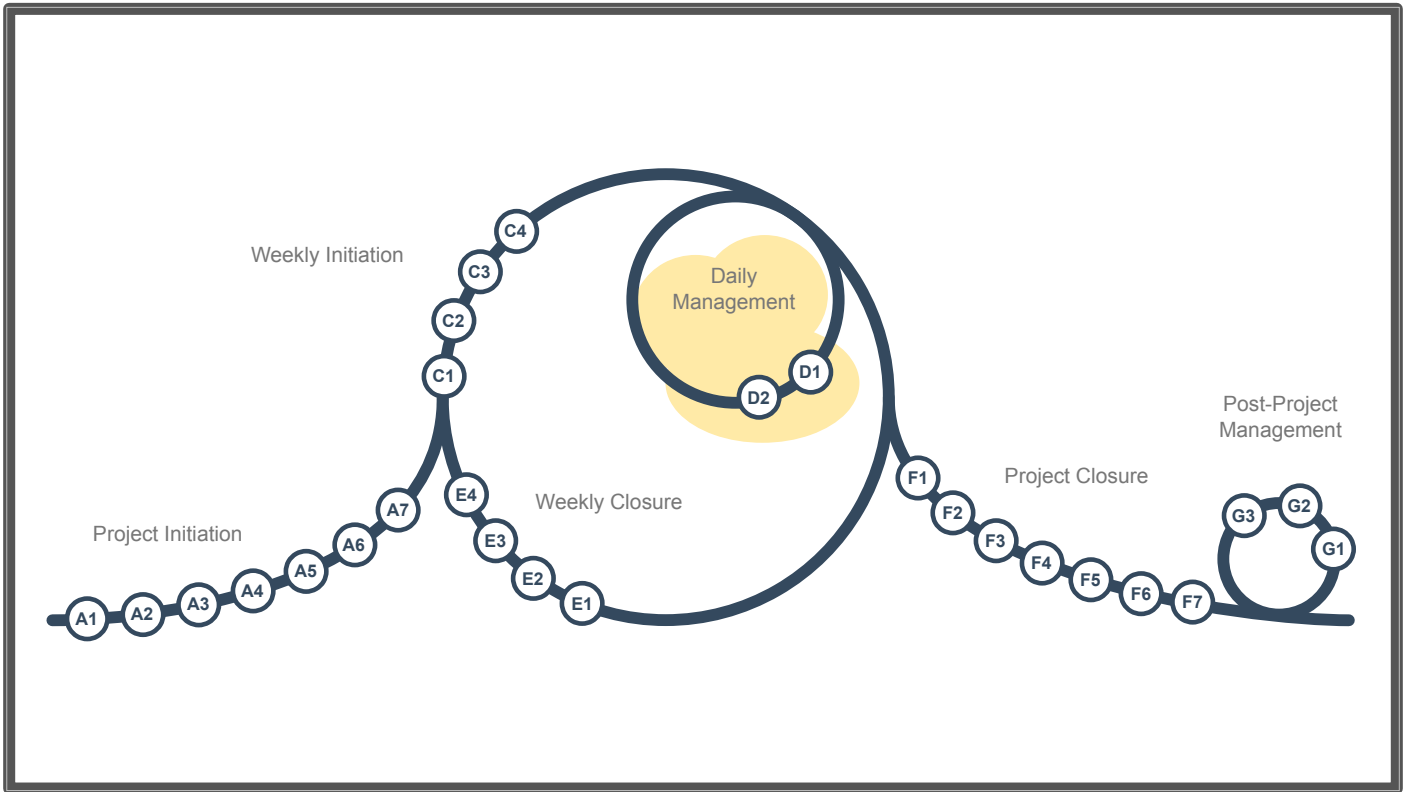
Give them an idea of what Weekly Closure is without going through the details.

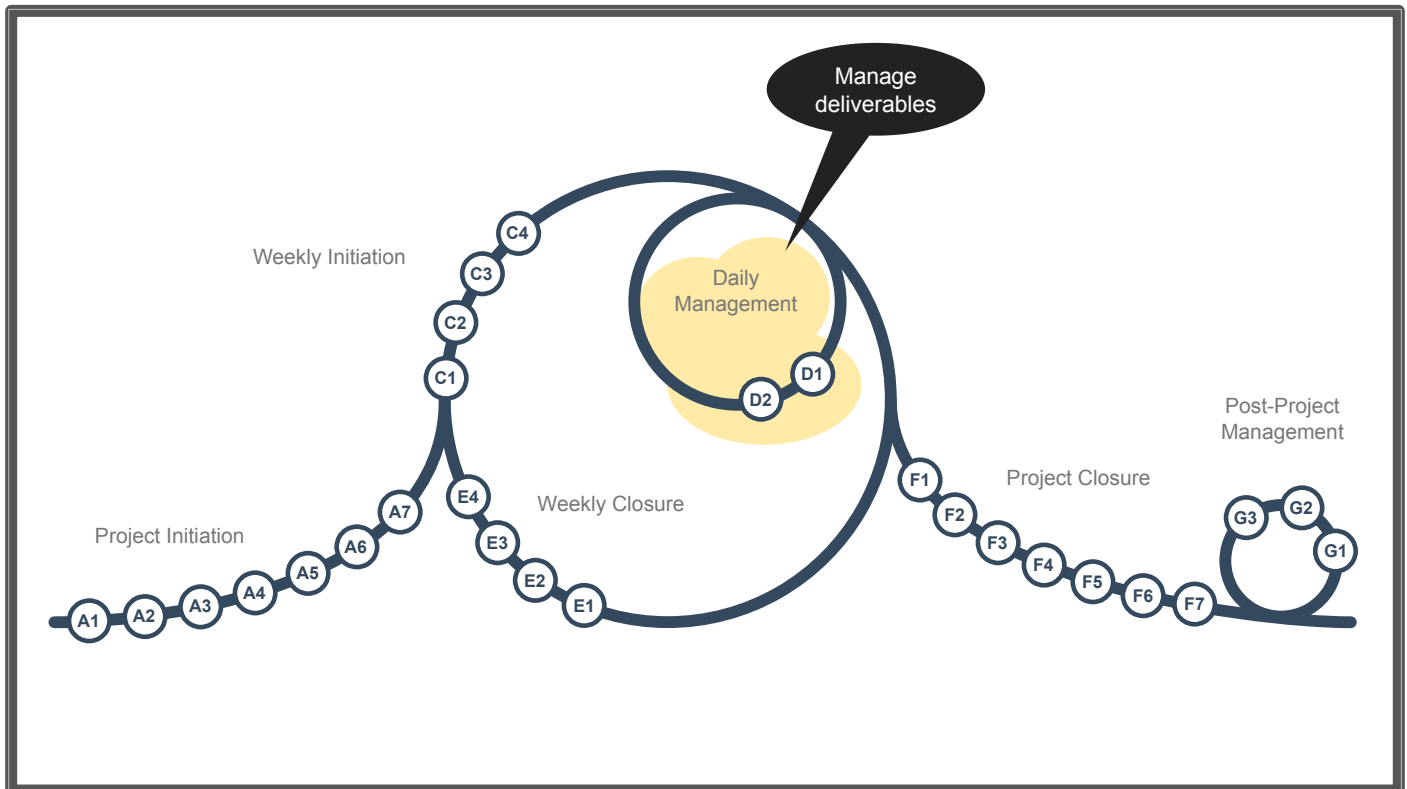






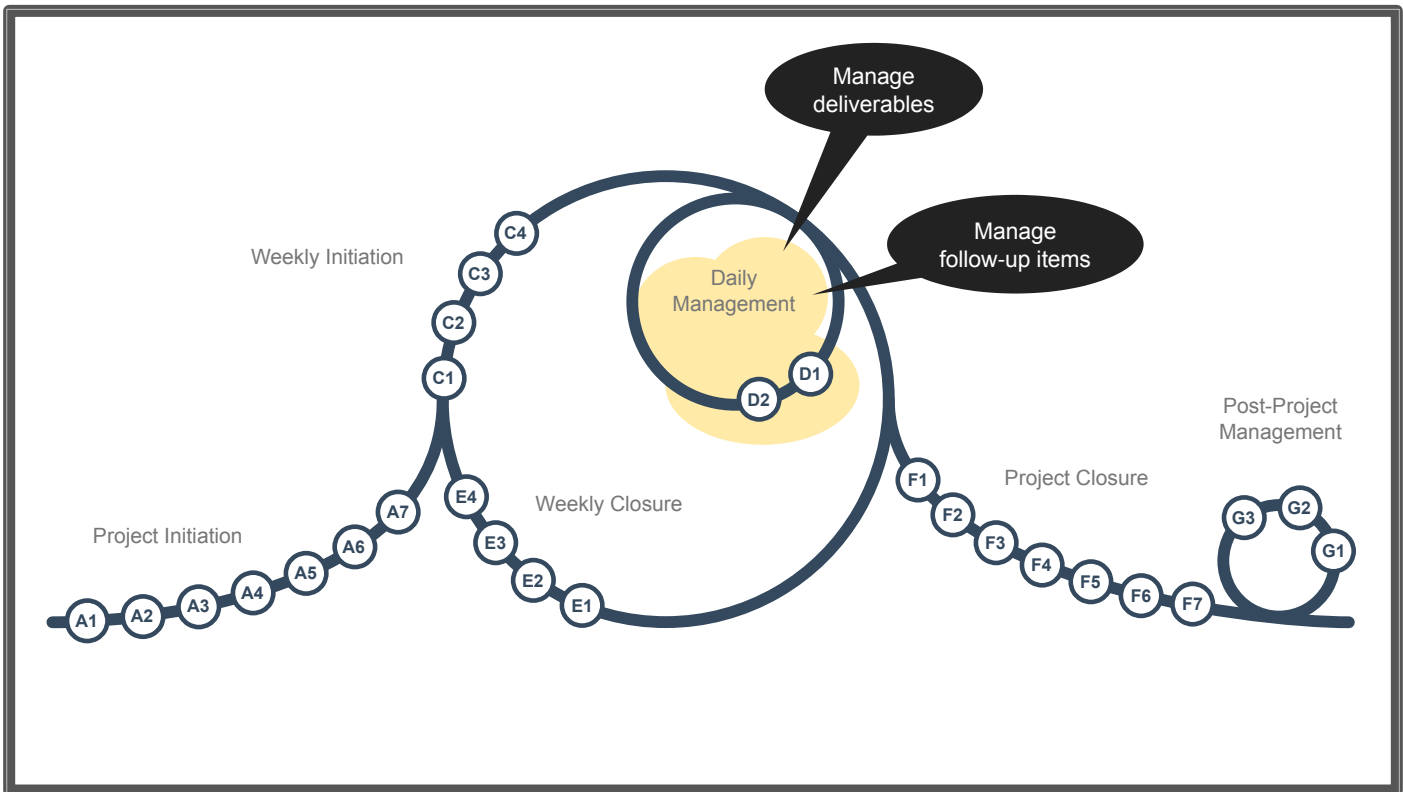


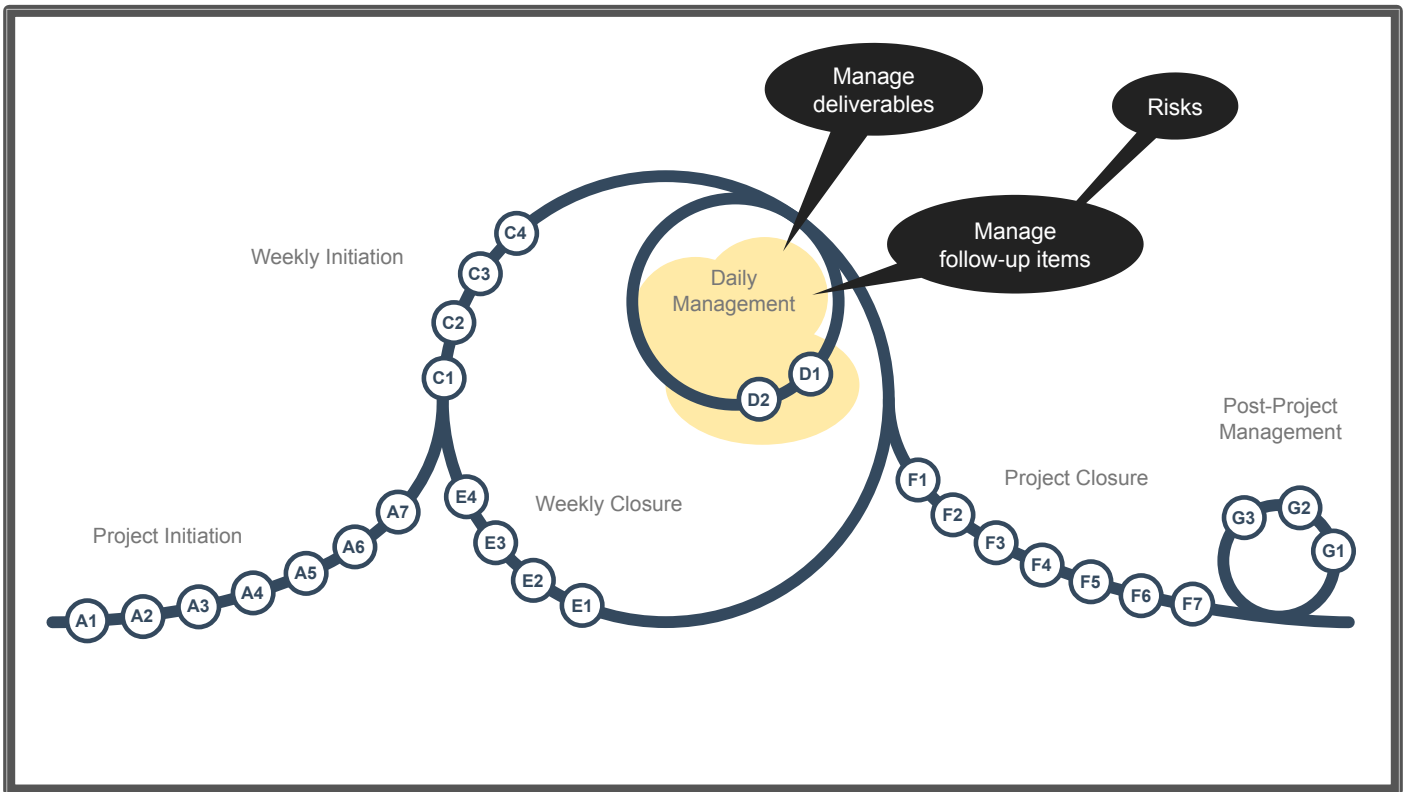


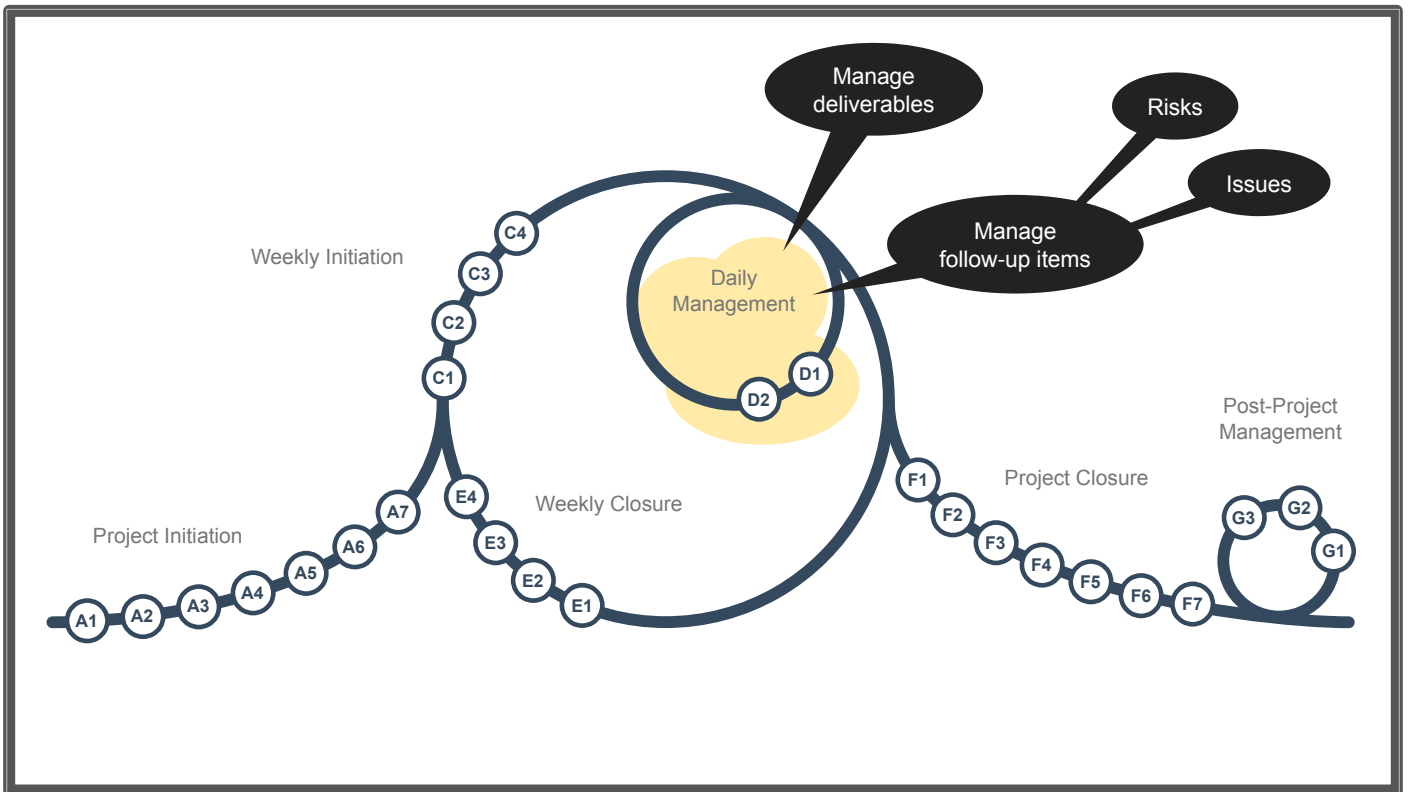


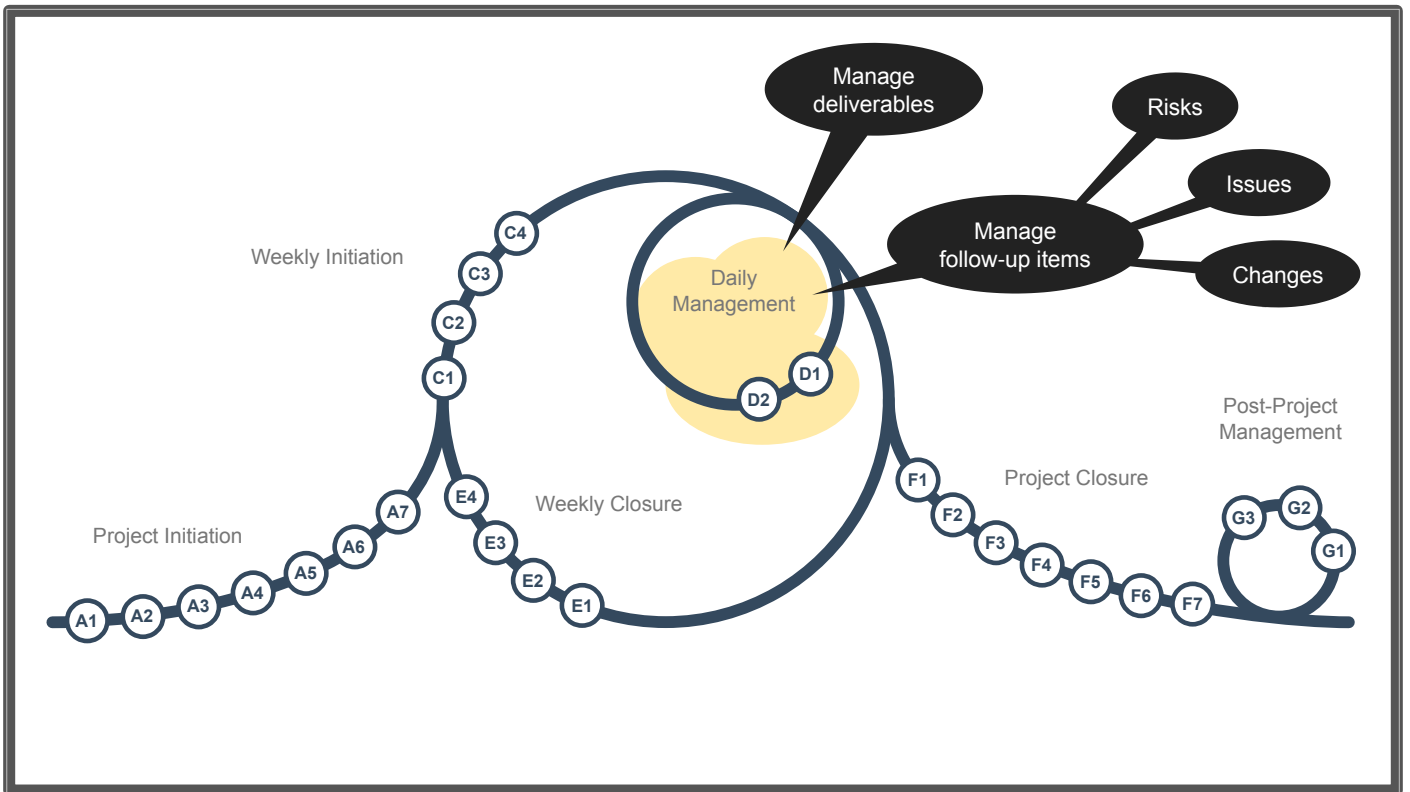
Depending on your audience, you may need to explain what a deliverable is (without going into too much detail): The building blocks of the final output. You can take a sample project and ask the audience to give examples of deliverables. Some of those may be huge deliverables, so you can get help from them to break them down into smaller ones. Then, explain that both the huge thing and its smaller parts are called deliverables, and this breakdown is one of the things we do in the Weekly Initiation activities.

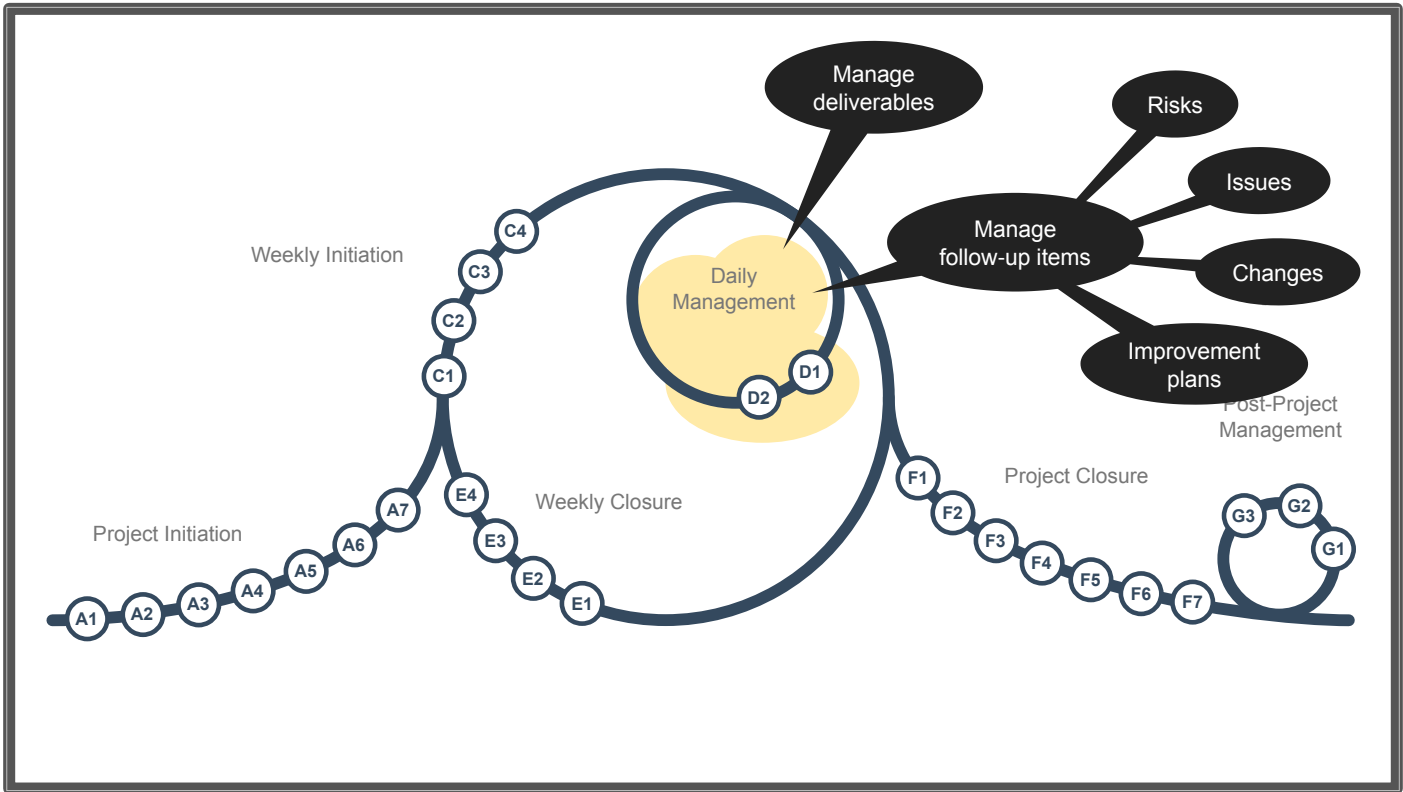


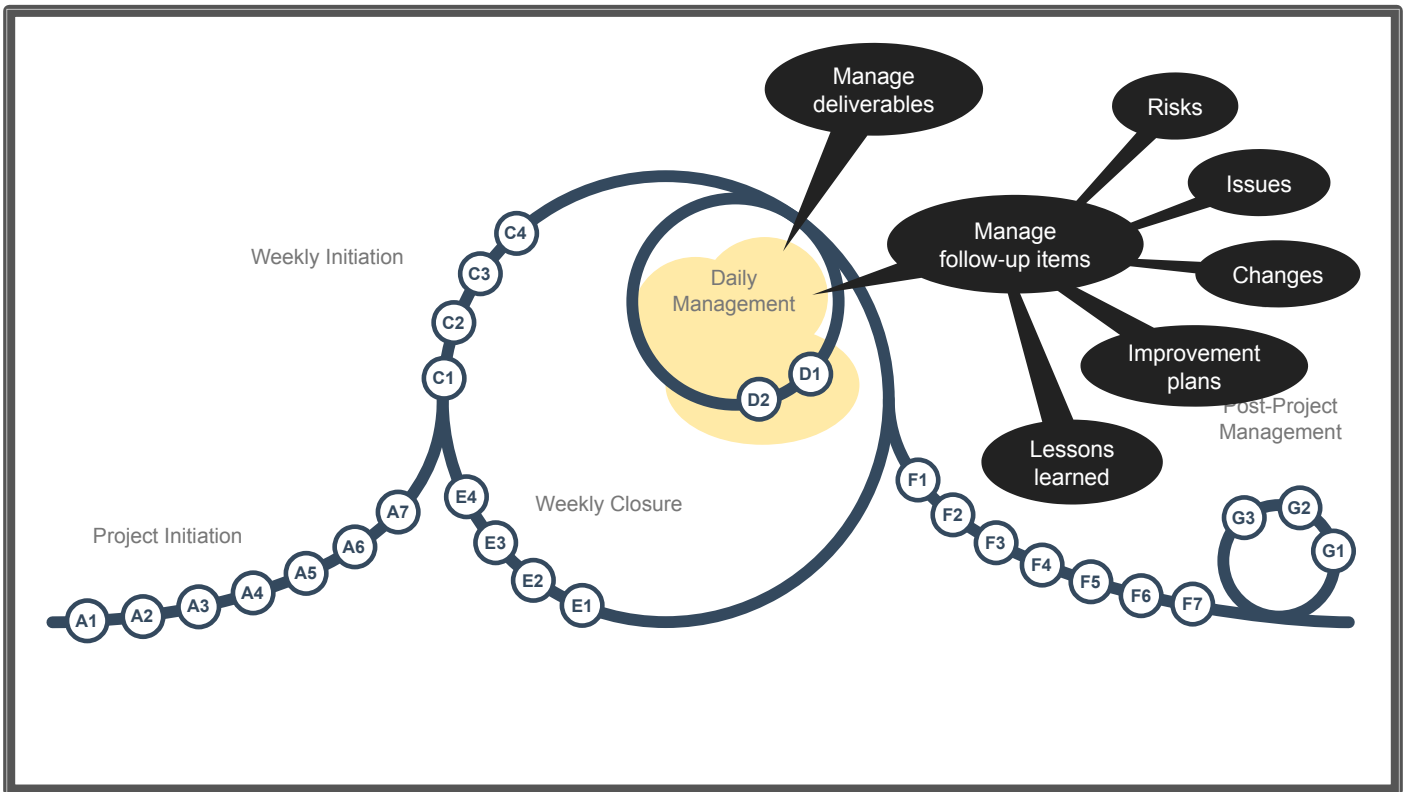








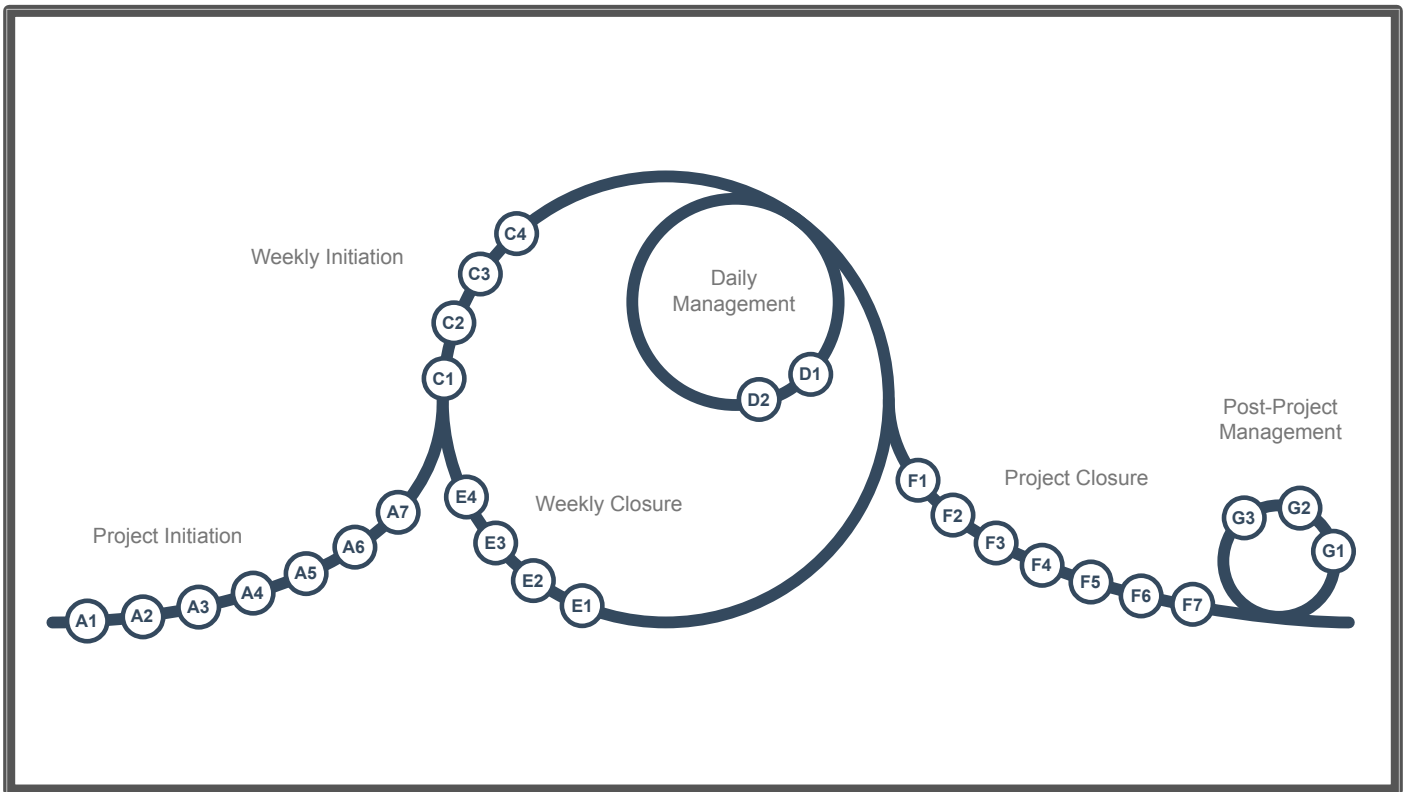


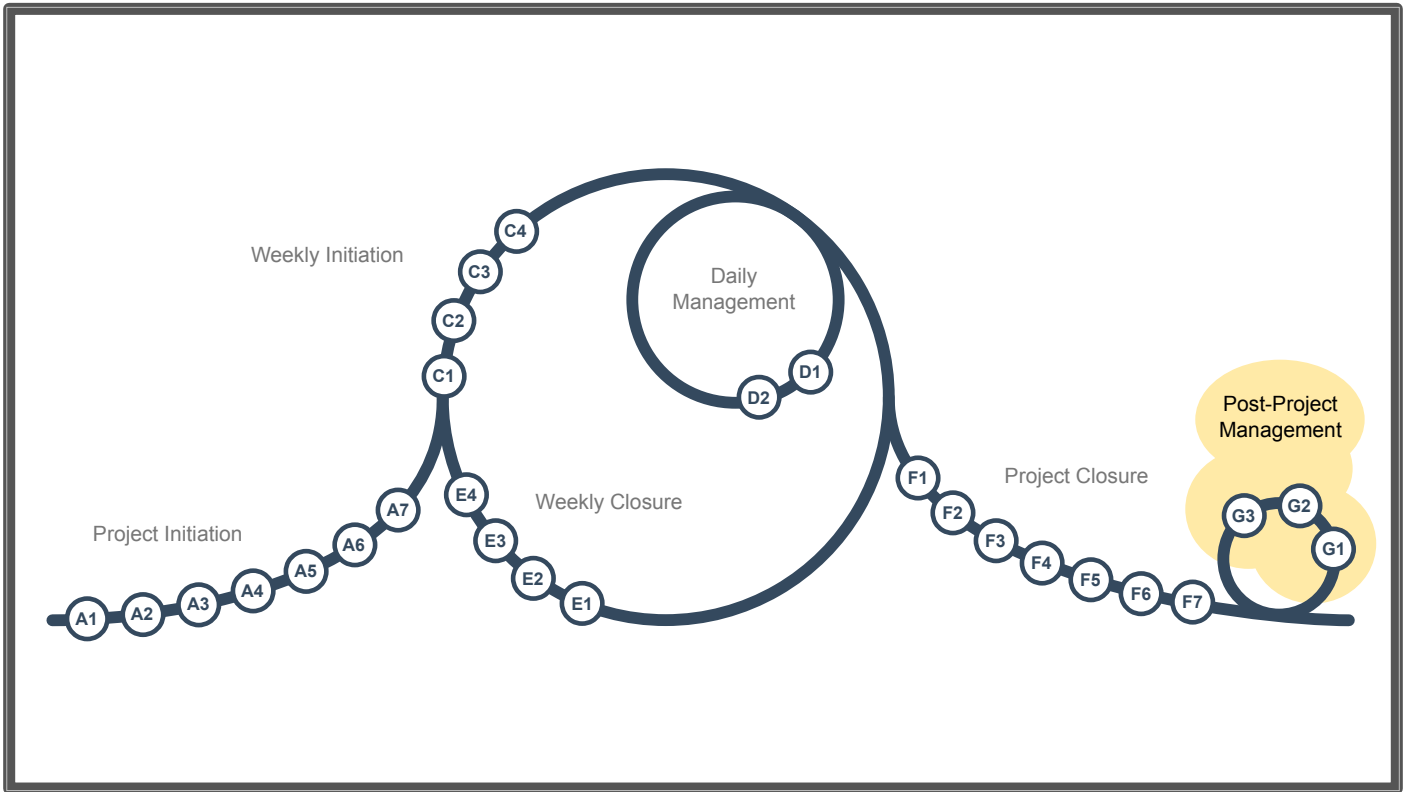


You need to know your audience and tailor your explanations accordingly. For example, if they are familiar with the project management systems, you can simply tell them about the different types of entities we call follow-up items, but otherwise, you can simply give them a few examples of each type. Yet, ensure they understand that we don't separate them based on type but know all of them as follow-up items only. That's so because

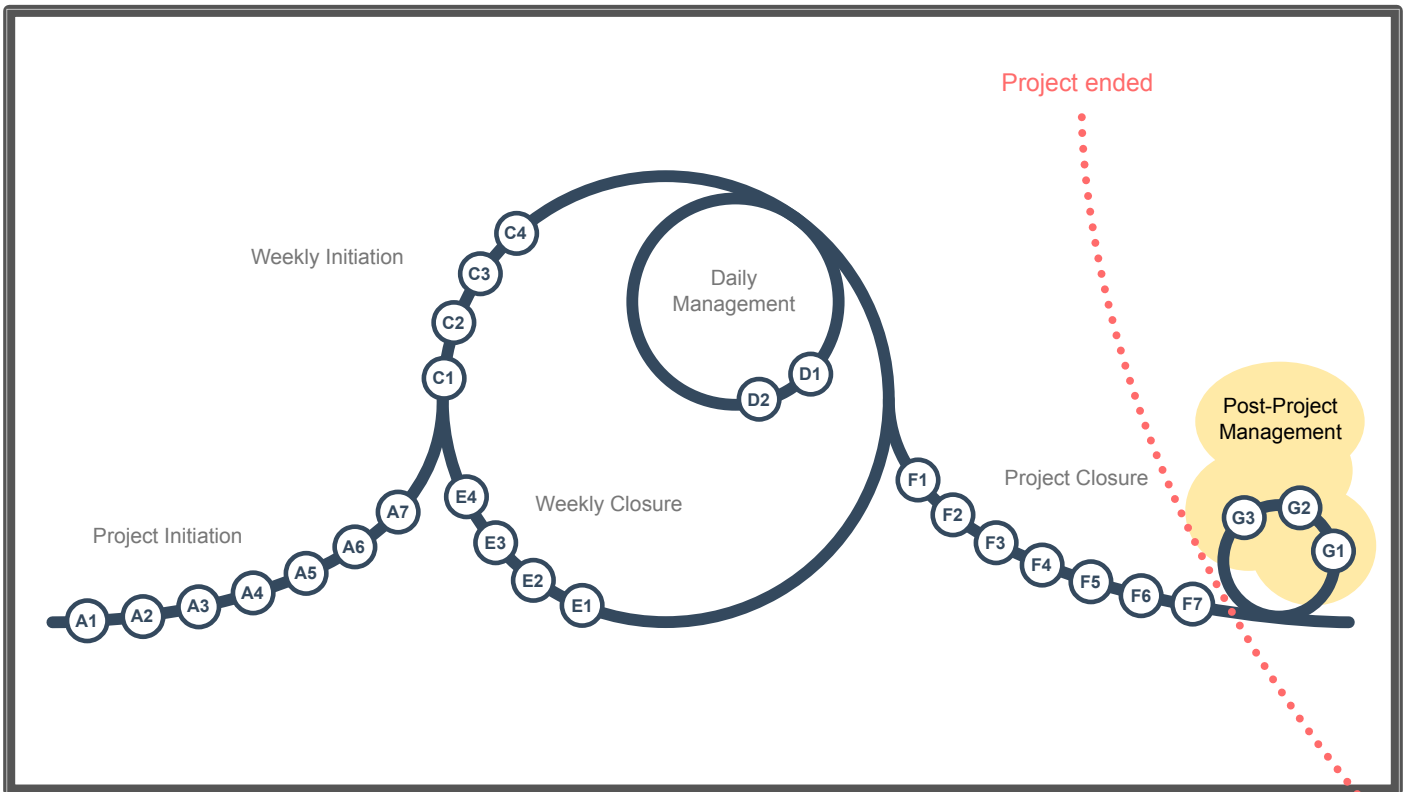
1) we use the same process for all of them, and

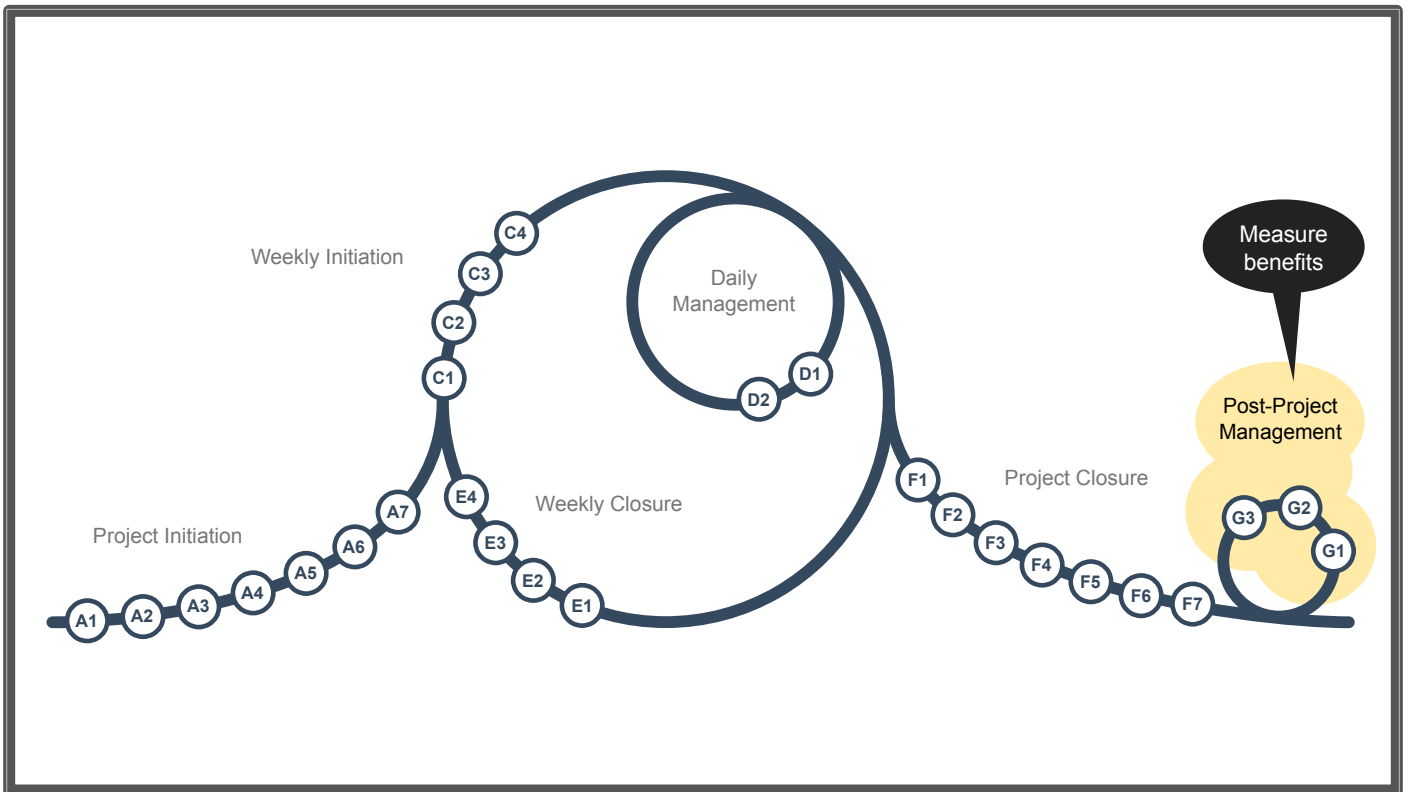
2) they morph from one form to another (something that used to be a risk actually happens, which makes it an issue, and will be ultimately closed, which makes it a lesson learned.)

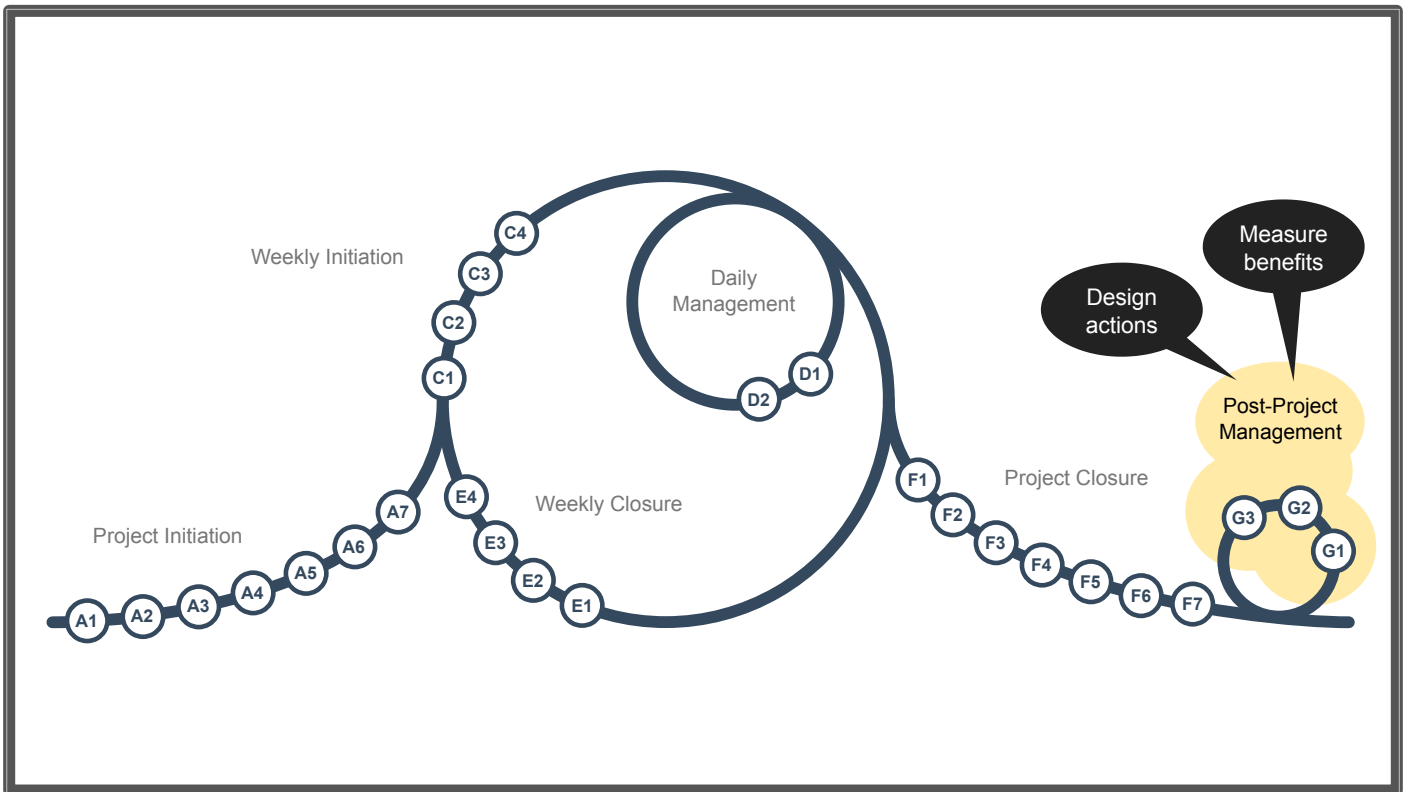






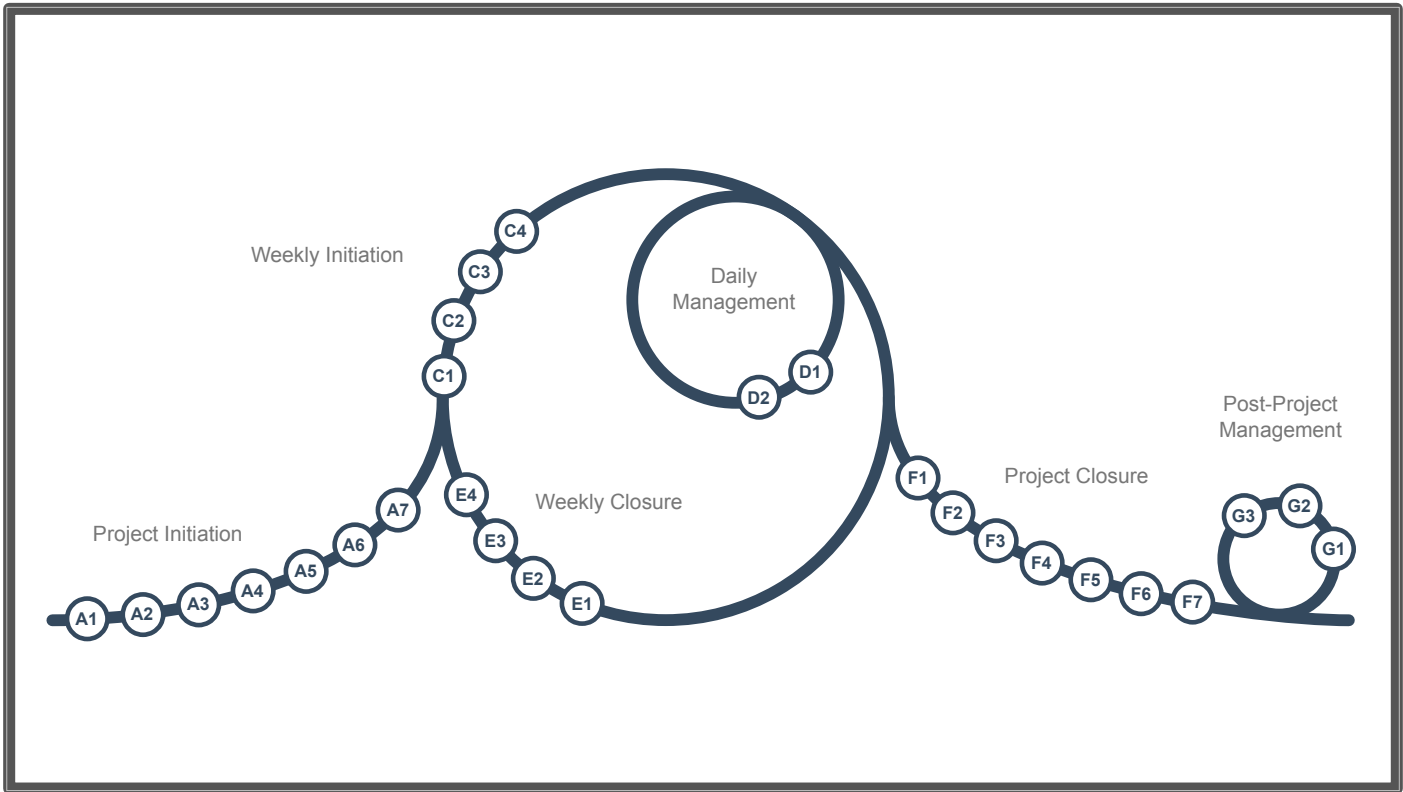






In case you have questions: When there's a portfolio management system, it will be responsible for this cycle, and they will do it based on their own method. But otherwise, the team members go through this cycle after the project ends. We'll have more content about it in the second section.

Feel free to give them a few examples of how a project output that's generating benefits can generate more with only a few extra activities. For example, you may do a great job teaching this course and benefit from it. However, after it ends, you may be able to publish a few photos and testimonials from the course participants on LinkedIn. Those extra tasks are not significant compared to what you've done, but they really help increase your benefits. Remember to keep it short and leave the details for the next section.



① High-level overview

→ ② Full review

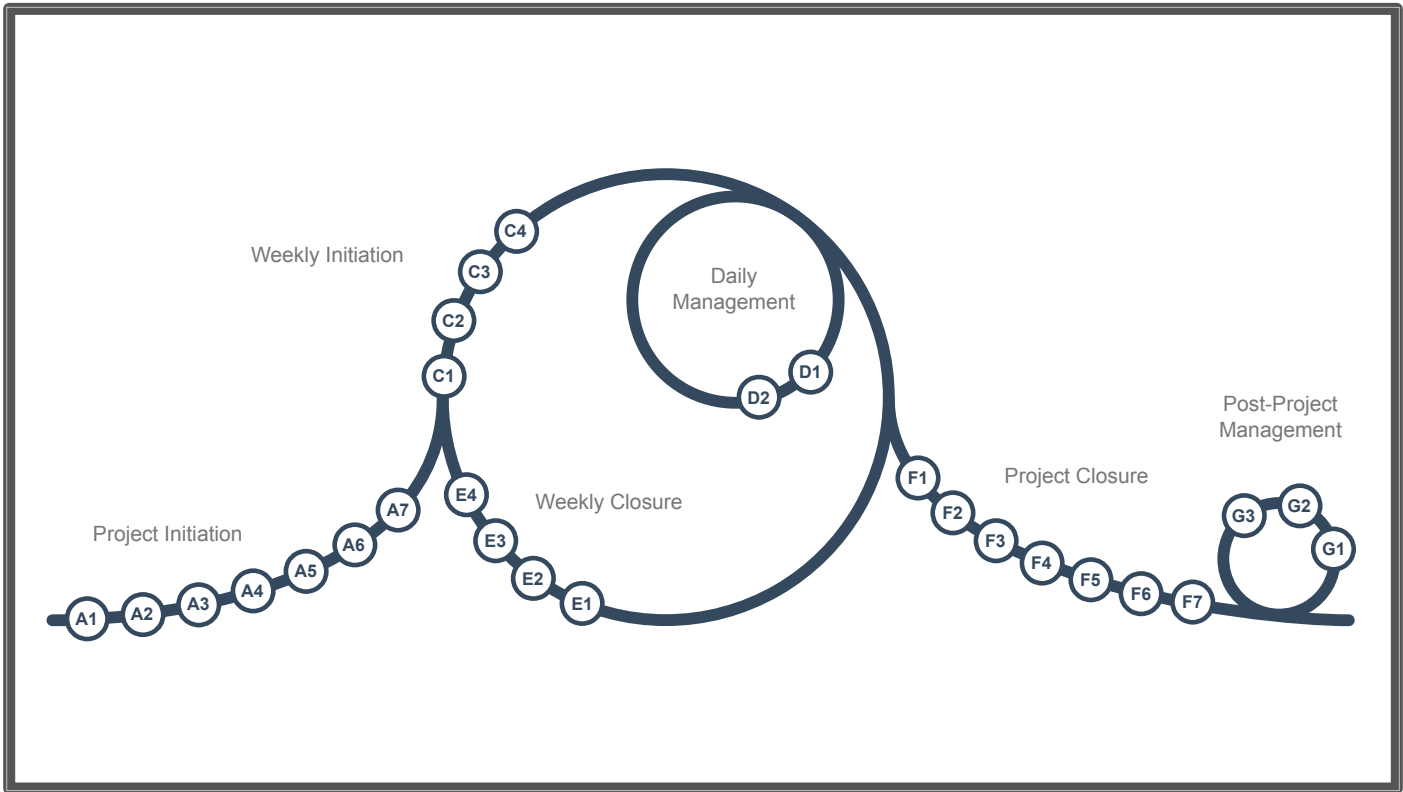
③ NUPP

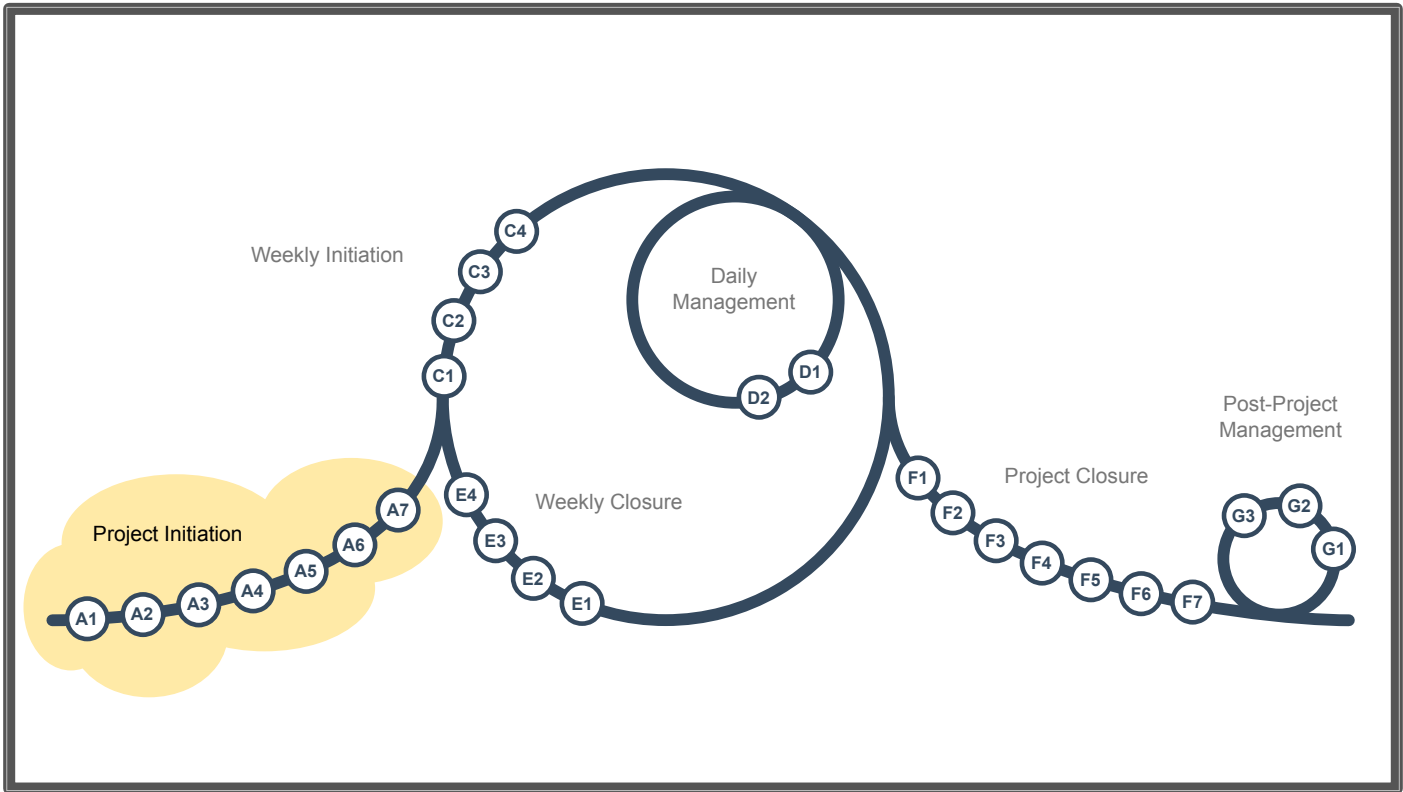
④ Tailoring

⑤ Context

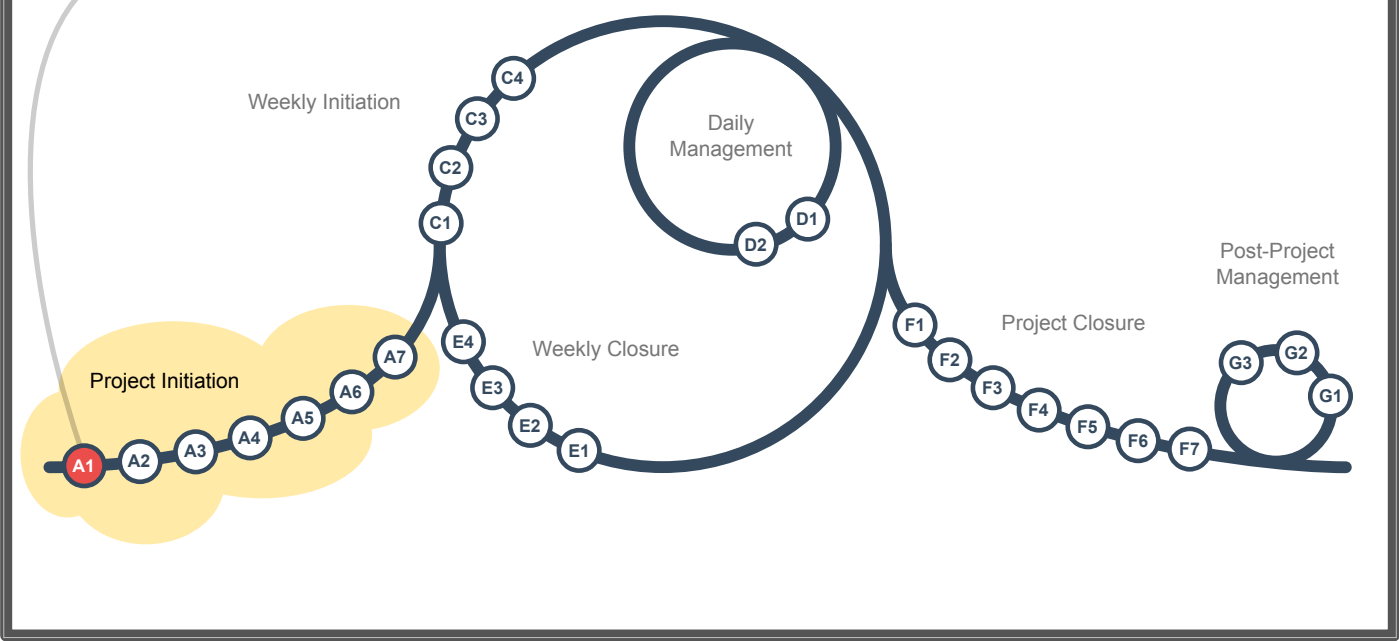
⑥ Certification

This is the main section of the course, where we discuss all the details.



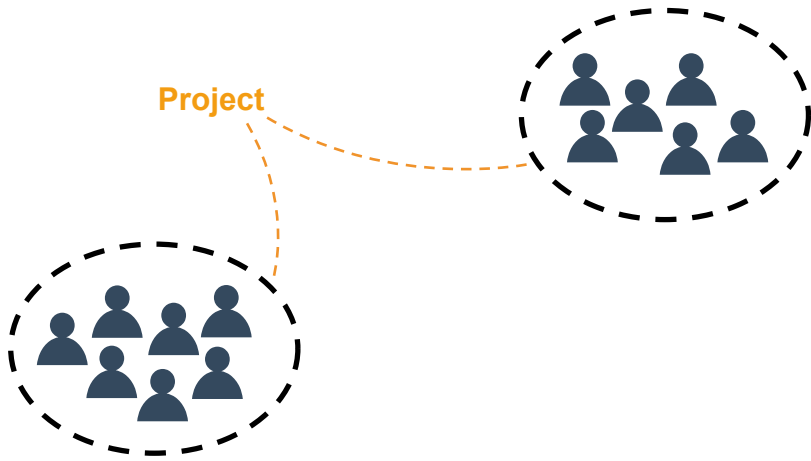


Identify the high-level decision maker(s)

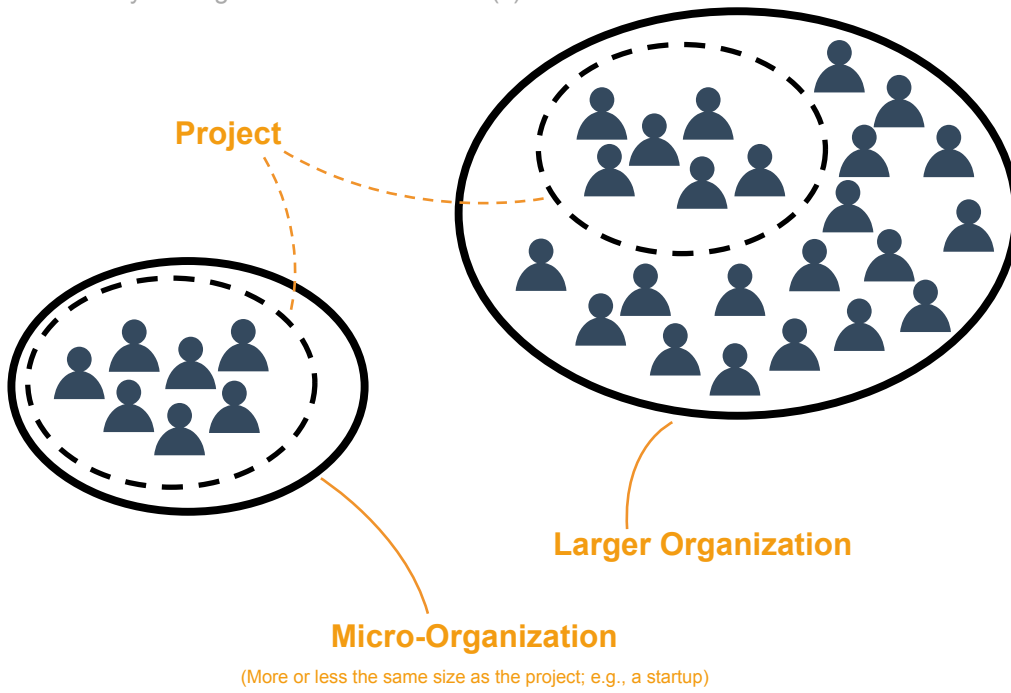




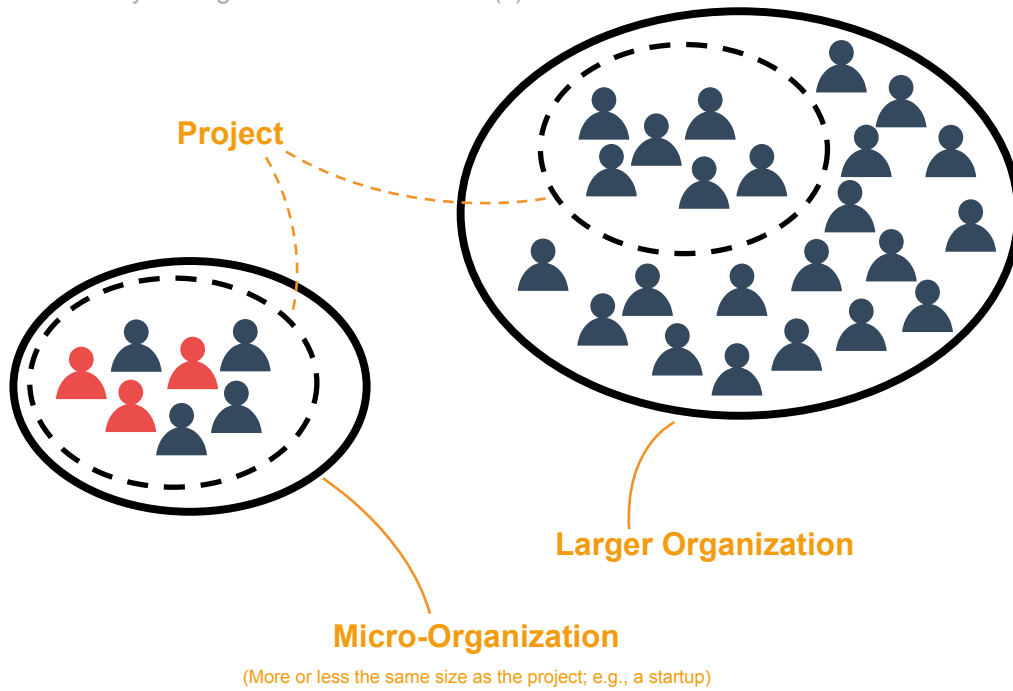
A1 - Identify the high-level decision maker(s)



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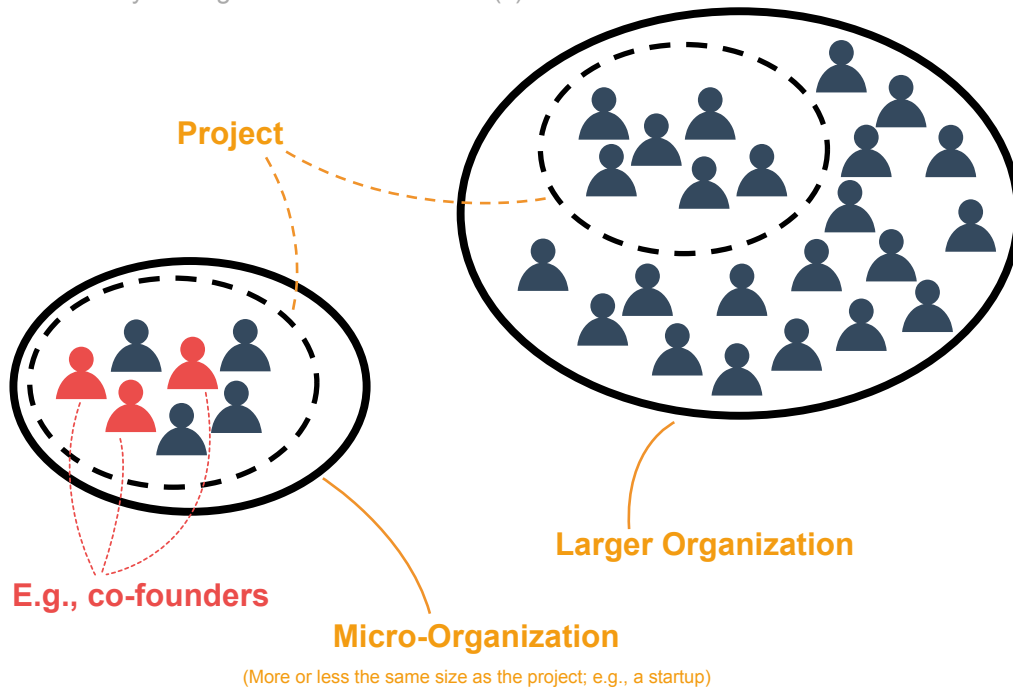


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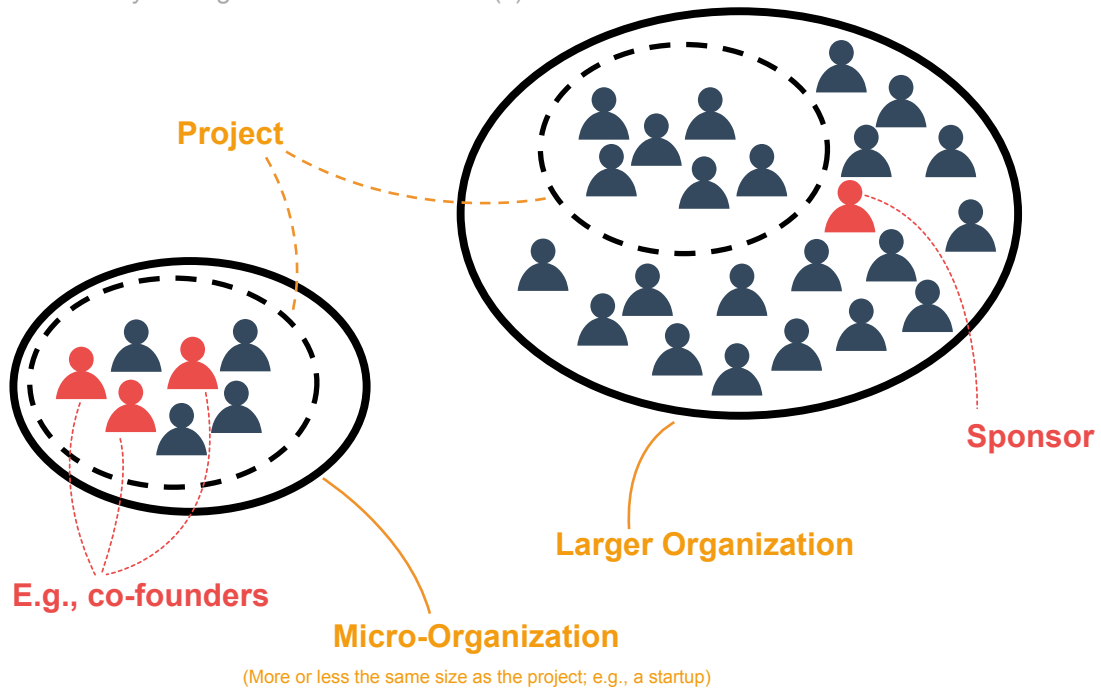


In micro-organizations, the whole team or a subset of it can be the high-level decision-makers. We only show the situation where a subset is responsible, to contrast it with larger organizations, but there's also the option of having everyone responsible for the high-level decisions in a micro-organization.

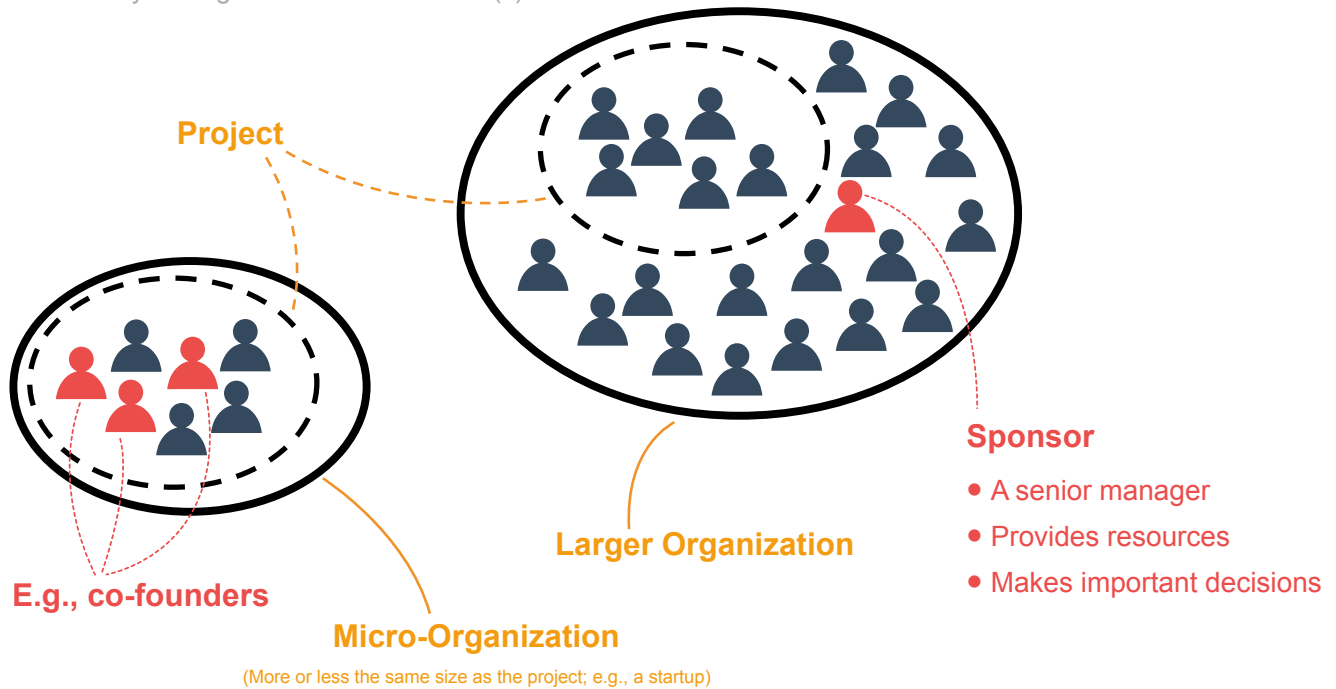
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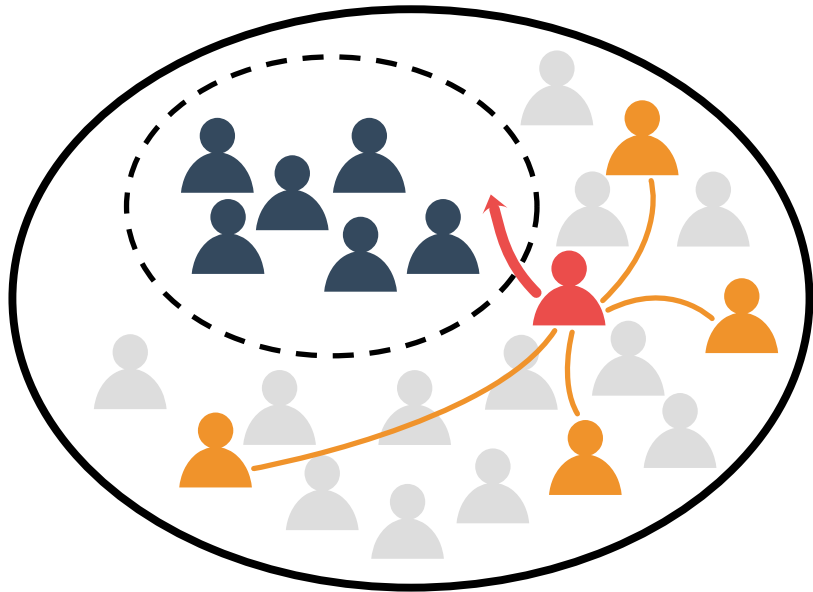
A1 - Identify the high-level decision maker(s)



Tell them what “providing resources” means; i.e., it may be challenging to get resources in large organizations, and while it may not be easy for a regular team member to do it, a senior manager has the organizational power to do so.

If needed, you can tell them that while everyone in the team is responsible for its **output**, it’s the high-level decision-makers who are responsible for the **outcome** of that output.

A1 - Identify the high-level decision maker(s)

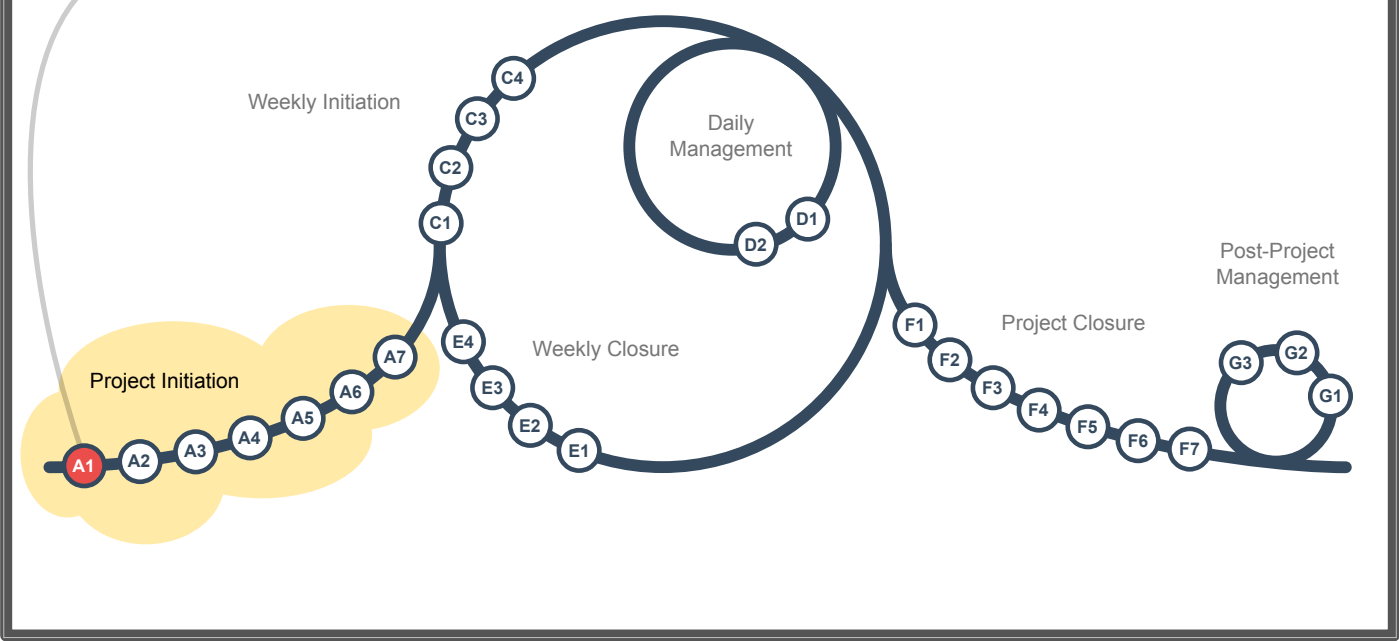


For decisions,  
the team is only in touch with the sponsor.

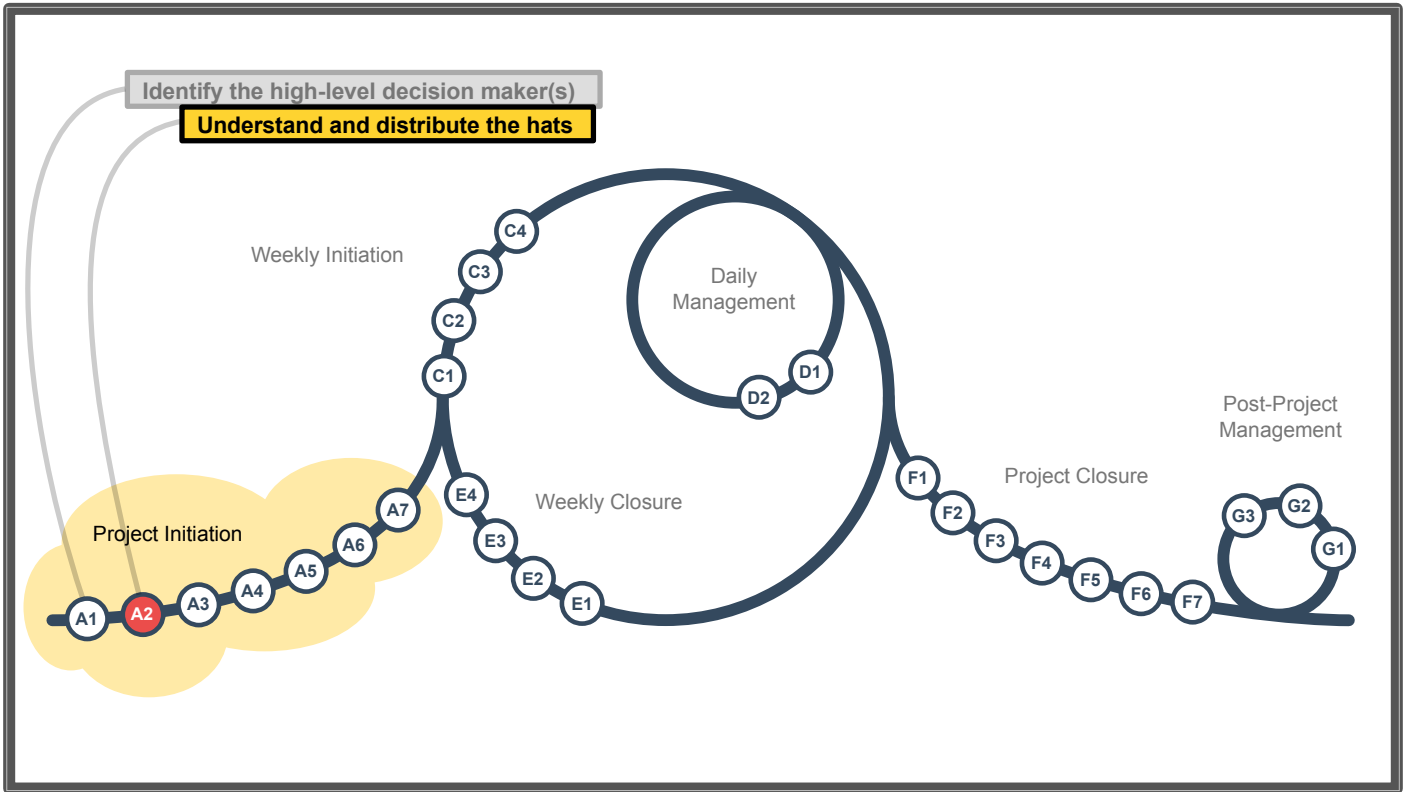
(If more people should to be involved, the sponsor will take care of that.)

This is an important point: Some organizations may have complicated and implied decision-making processes, and we don't want the team to be worried about it. So, they are only in touch with the sponsor, and it's entirely up to the sponsor to make sure people who are supposed to be involved in the decision are and then to bring the final decision to the team.

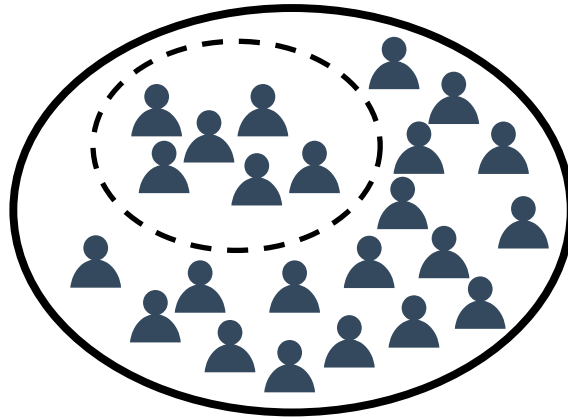
Identify the high-level decision maker(s)

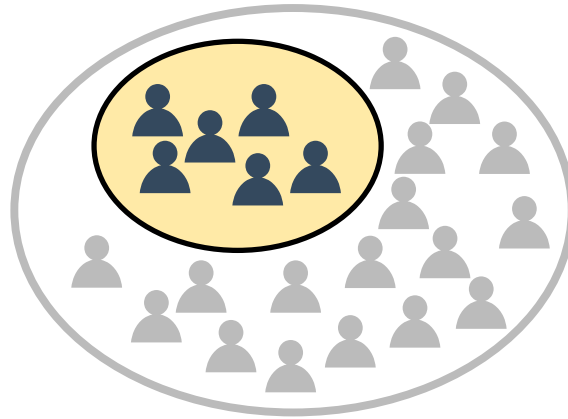






A2 - Understand and distribute the hats



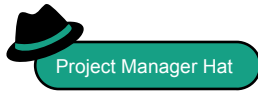


Team members should be officially appointed to the project.

(Instead of appointing tasks to departments)

This may sound too simple, but many organizations don't do it, and such a setup won't suit any structured project management system, including micro.P3.express.

A2 - Understand and distribute the hats

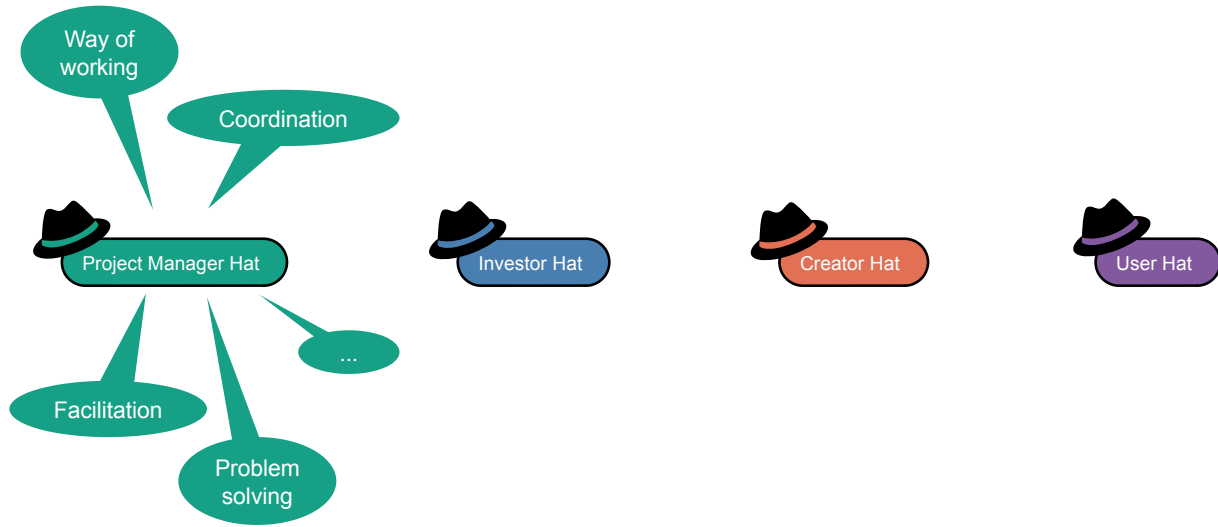


### IMPORTANT:

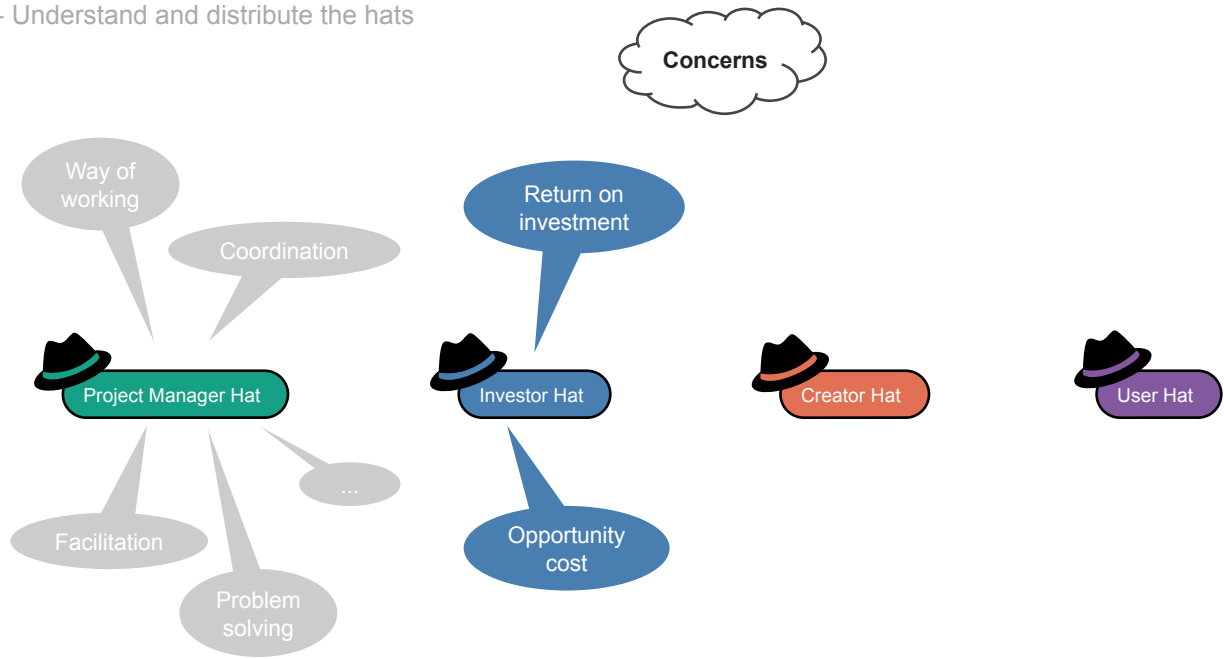
make sure they understand that the hats are all about “concerns”.

Also, tell them that we’ll take a look at a few general types of concern now, and the actual concerns will be discussed when we get to other activities.

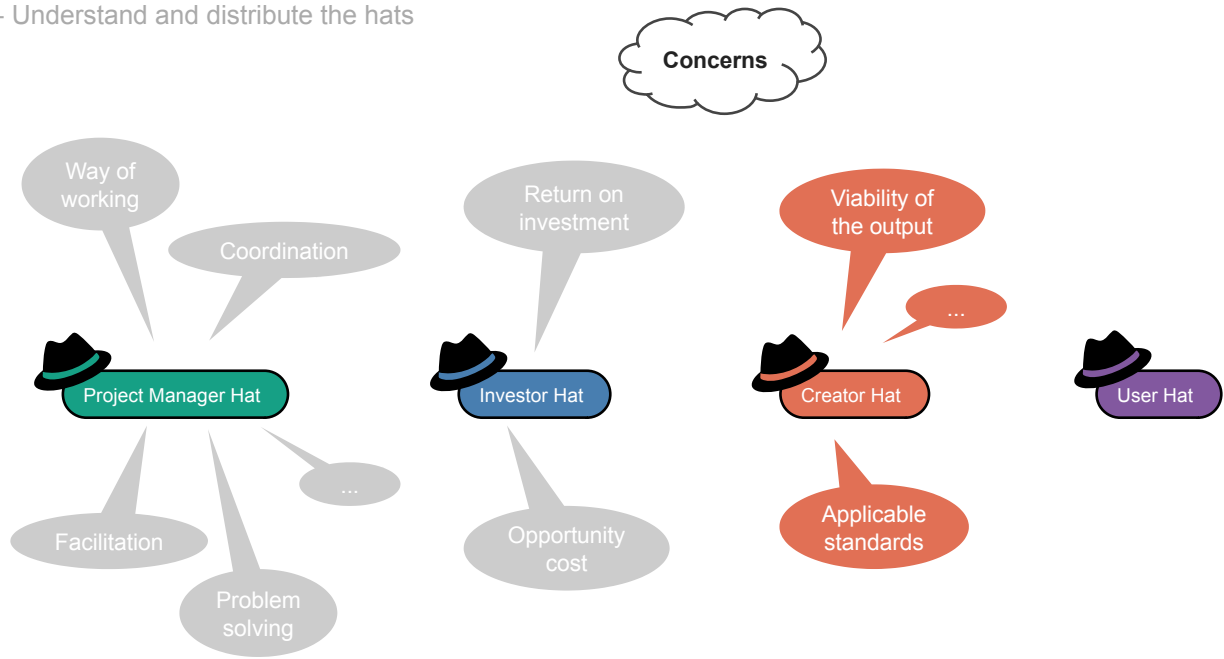
A2 - Understand and distribute the hats



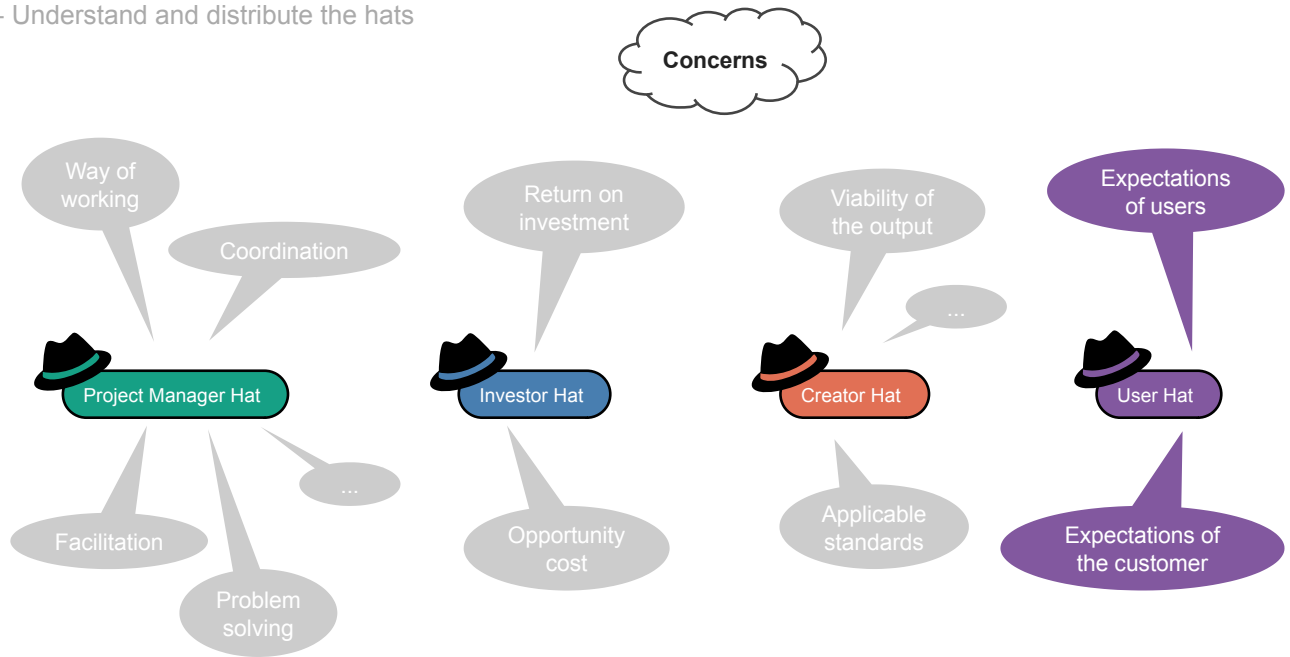
A2 - Understand and distribute the hats



A2 - Understand and distribute the hats



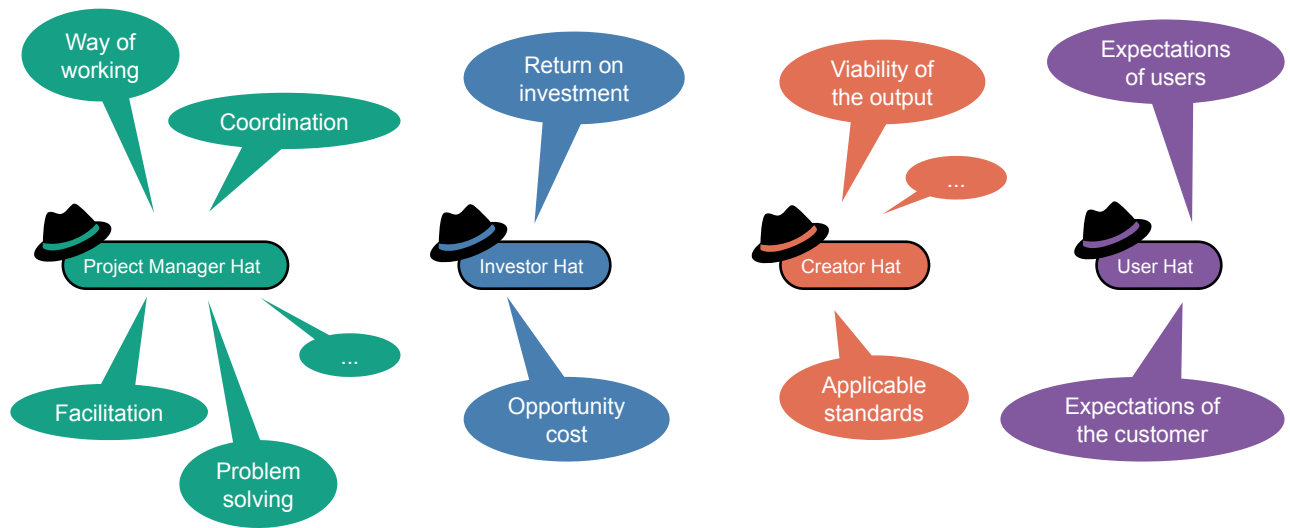
A2 - Understand and distribute the hats





A2 - Understand and distribute the hats

Concerns





✓ Expressing concerns

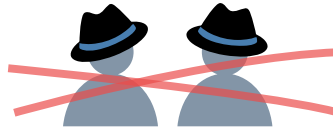
~~(Decision making) authority~~

Normally, roles give people authority and expect something in return. Here, we do neither of them, and that's one of the reasons we call them "hats" instead of "roles".

People wearing the hats don't get any authority, and they are also not responsible for doing things but to **express certain concerns**. In other words, they are responsible for reminding the team of important things that may be otherwise forgotten or underestimated.

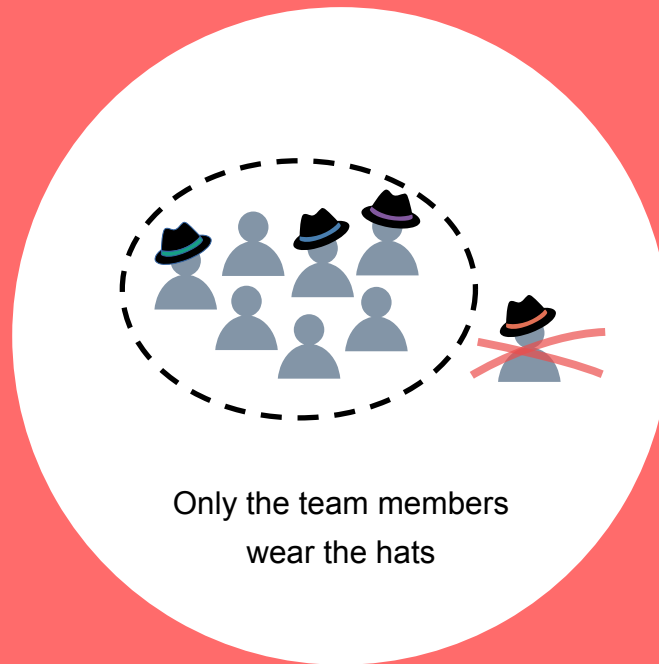


As we proceed in the course, we'll see various concerns expressed through questions. We don't expect the hat-wearers to have answers to those questions, but we expect them to ask those questions and make sure the team has answers for them.



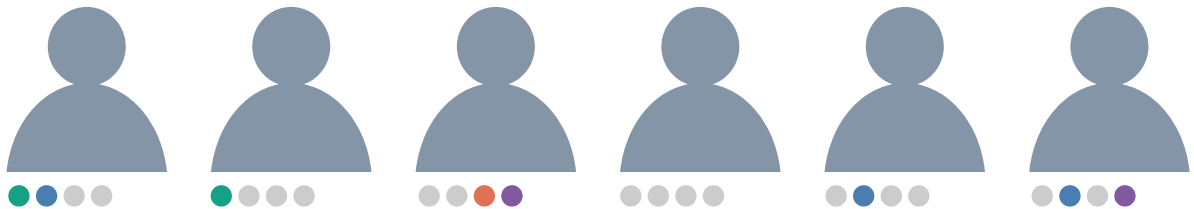
Only one person  
wears the hat at any one time.

We do swap hats when possible, but even then, there's one of each hat, and no more than one person may wear a hat at one time. To be more precise, during each cycle, each hat is worn by only one person.



Every hat-wearer must be a team member. Sometimes we have to look more to find someone who can wear a hat, and sometime, we may need to bring a new person to the team who can wear a hat. So, for example, you shouldn't give the User Hat to a customer representative because they know the users very well.

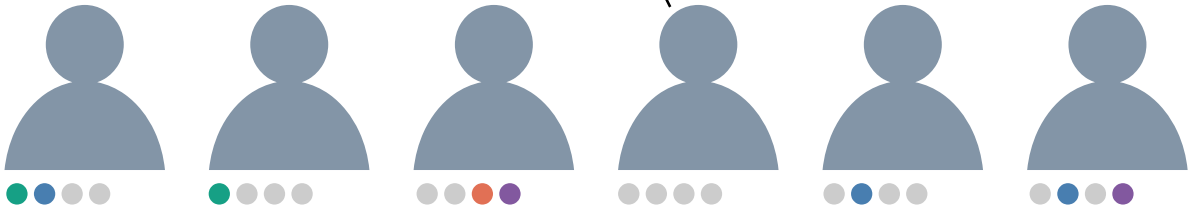
A2 - Understand and distribute the hats



**Who is capable of and willing to wear each of the hats?**

The dots in this slide represent each of the four hats. In A2, we have to decide who can and wants to wear each of the hats, and we really want to share the hats as much as possible because that helps build a stronger team.

Some people don't want to or can't wear any hats, and that's fine.



**Who is capable of and willing to wear each of the hats?**

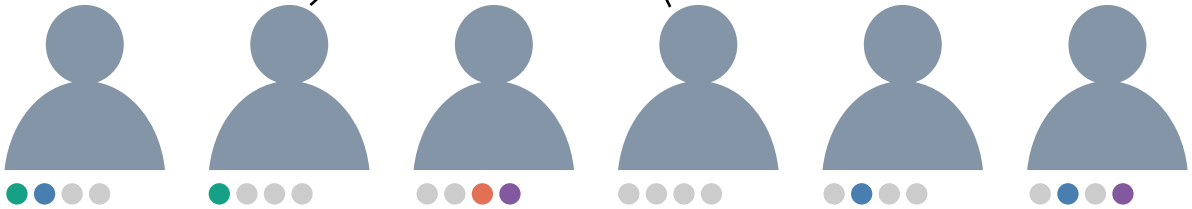
Some people want to be focused on their specialist activities (e.g., technical work), and it's best to refrain from bothering them with managerial work by forcing a hat. Let it remain voluntary. We can also change it in the middle of the project; e.g., if someone said at the beginning that they are willing to wear the Creator Hat doesn't mean they must keep their word, but they can change their mind.

What if we don't have enough volunteers for all hats? It means that we don't have a complete team. If possible, try to bring more people to the team; if not, there's no way other than some people volunteering to wear the remaining hats.

A2 - Understand and distribute the hats

Some people can only wear one hat.

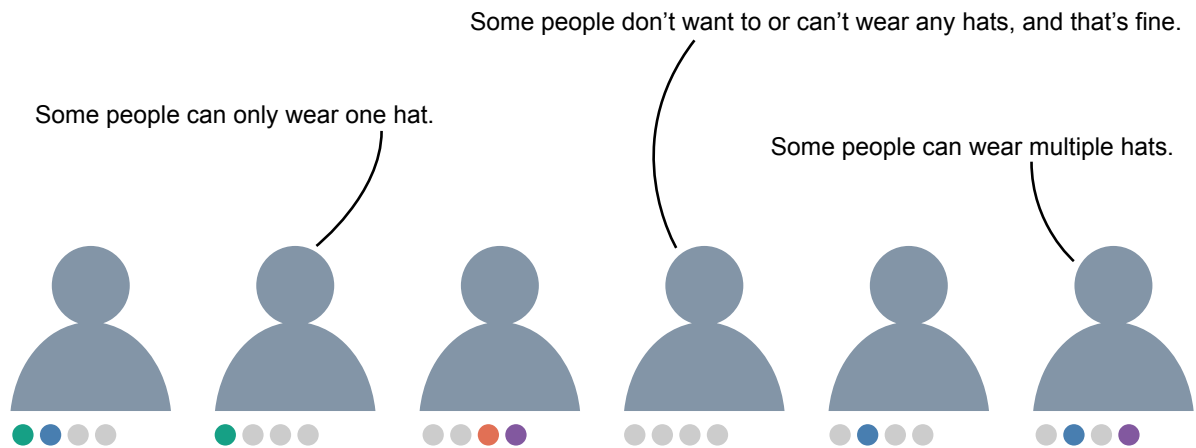
Some people don't want to or can't wear any hats, and that's fine.



**Who is capable of and willing to wear each of the hats?**



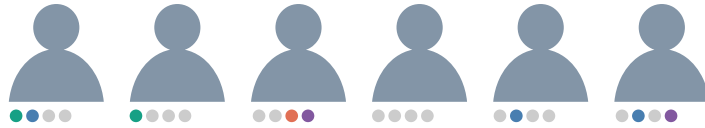
A2 - Understand and distribute the hats



**Who is capable of and willing to wear each of the hats?**

For people who can have more than one hat, it's best to give them one hat at a time, if possible. Having more than one hat is a little difficult for most people.

A2 - Understand and distribute the hats



**We prefer to swap hats frequently, if possible.**

## A2 - Understand and distribute the hats



If you want, ask them their opinion: What are the advantages and disadvantages of swapping hats?

One of the main advantages is that it helps people understand each other more. E.g., the User Hat's concerns may be annoying for the creators, but if they wear the hat sometimes, they would develop empathy for them and a better team.

When someone has the same hat all the time, they have a bigger chance of improving their skills, but when we swap hats, they may be a little distracted and slowed down.

micro.P3.express believes that swapping hats is a positive thing in the project and highly recommends it, but doesn't make it mandatory because it may be impossible in some projects.

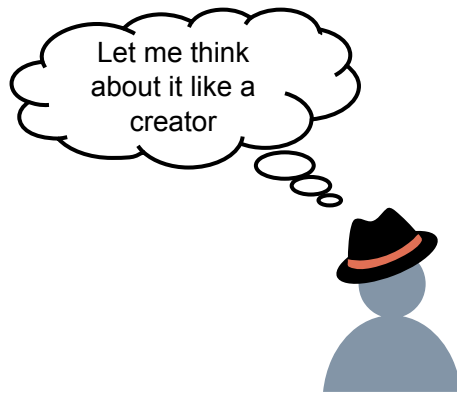


**In a single-person project, the person has to wear all the hats...**

Sometimes a single person should wear more than one hat. The obvious example is a single-person project.

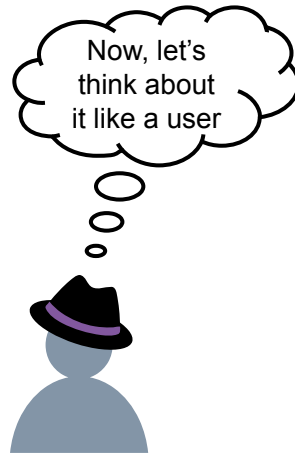
In this case, they must imagine wearing one hat at a time and think about the concerns without forgetting any of them. It needs discipline

A2 - Understand and distribute the hats



**The single person should virtually switch hats all the time.**

A2 - Understand and distribute the hats



**The single person should virtually switch hats all the time.**

A2 - Understand and distribute the hats



**The single person should virtually switch hats all the time.**

A2 - Understand and distribute the hats

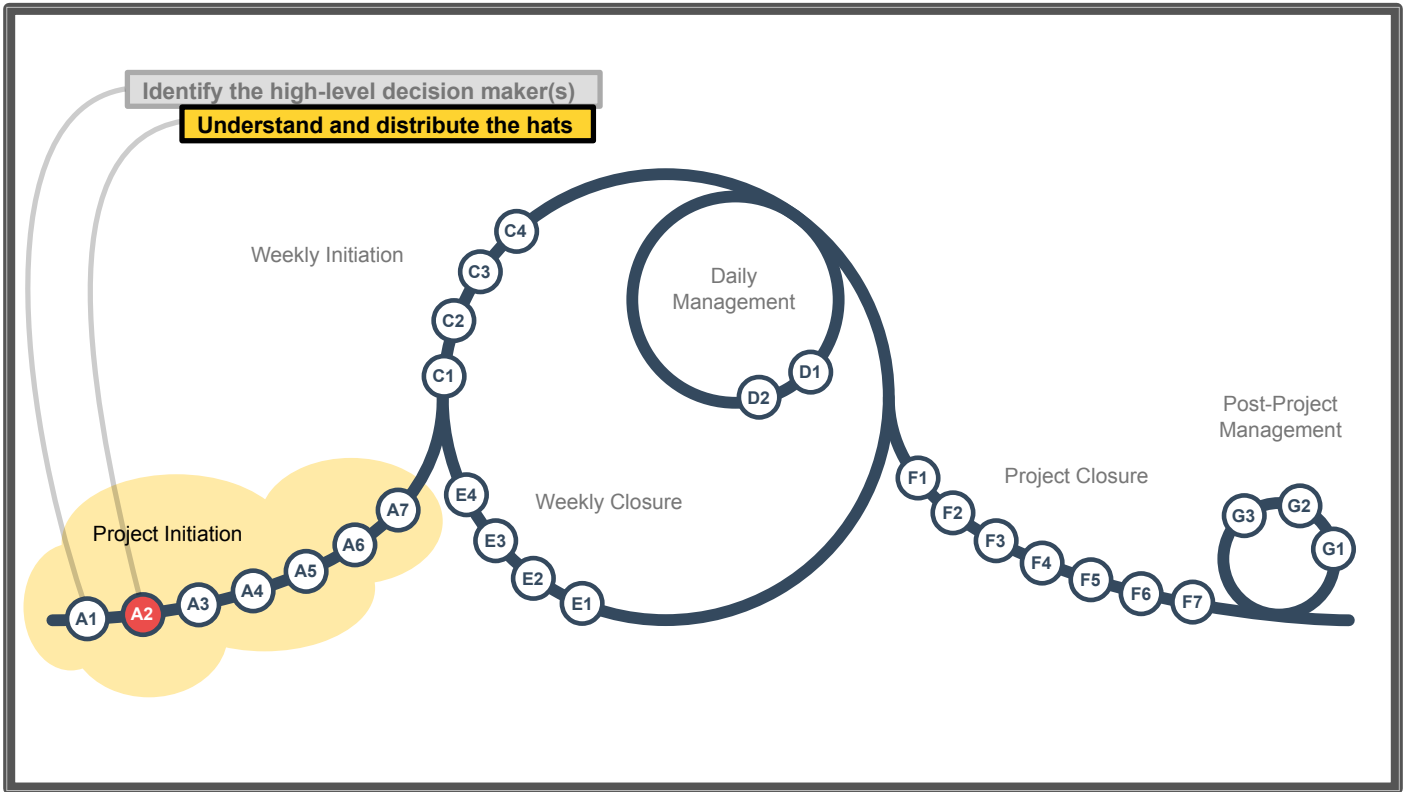


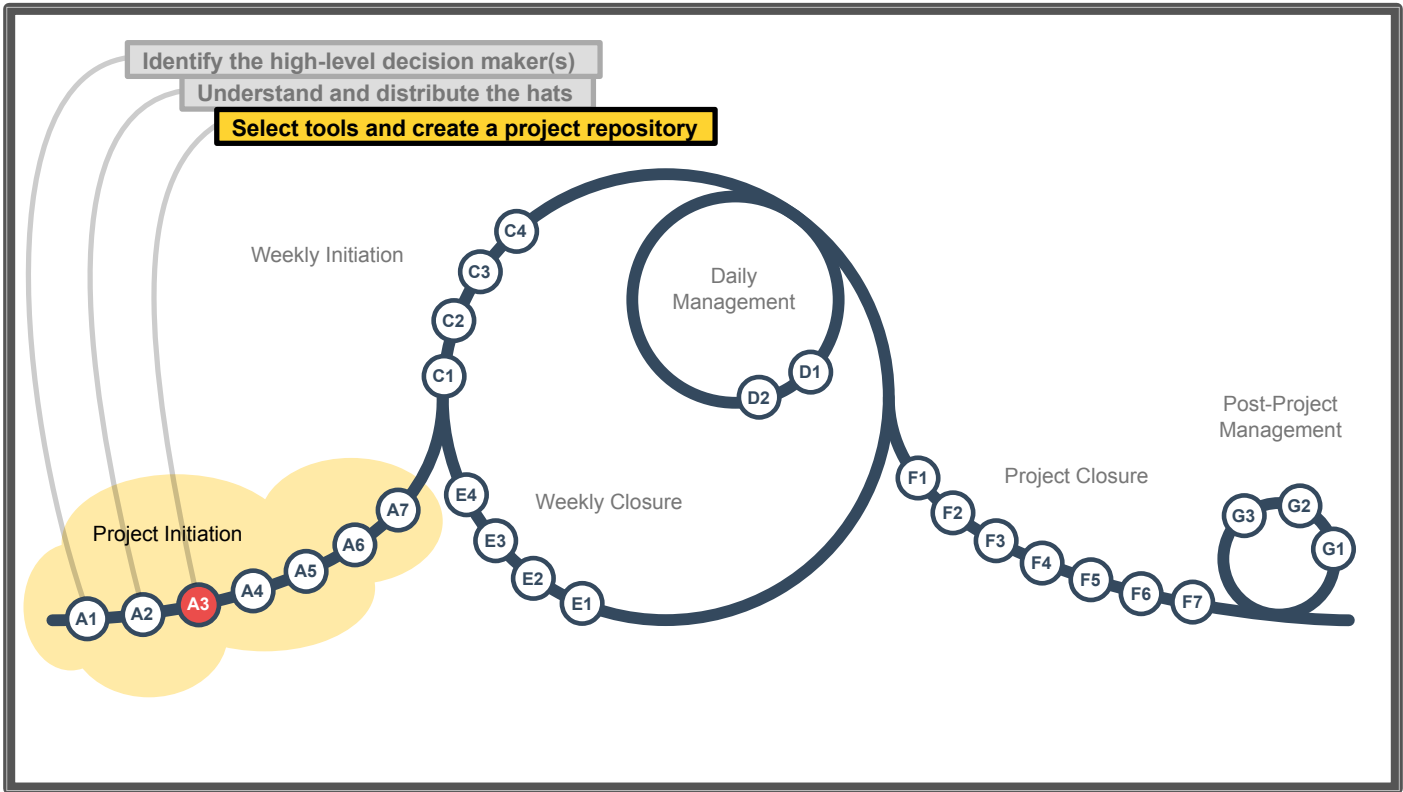
**The single person should virtually switch hats all the time.**



A2 - Understand and distribute the hats







What concerns do you think each hat should have  
in this management activity?



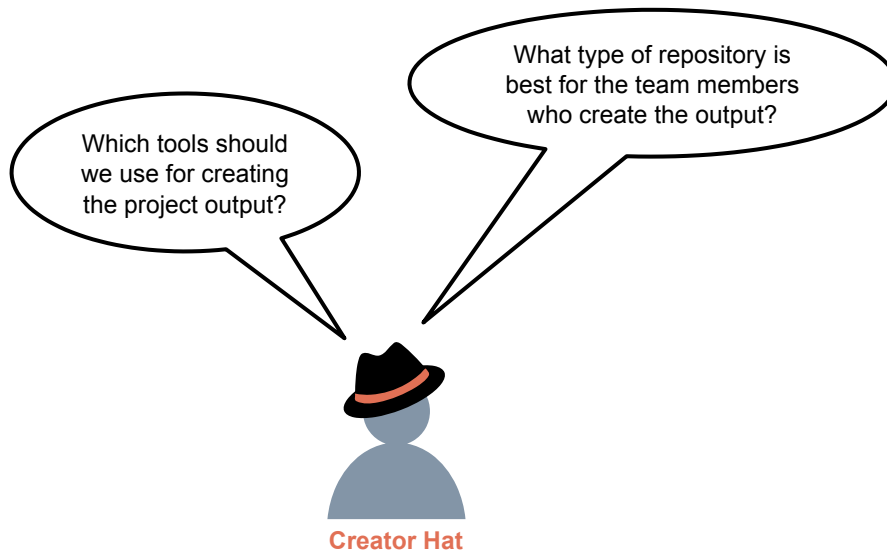
The bottom-left icon means you should ask the question from the class and ask them to answer it individually.

The bottom-right icon means you should ask people to work in teams of two, take a few minutes, and then present their opinion.

For this question, the bottom-right icon is highlighted.

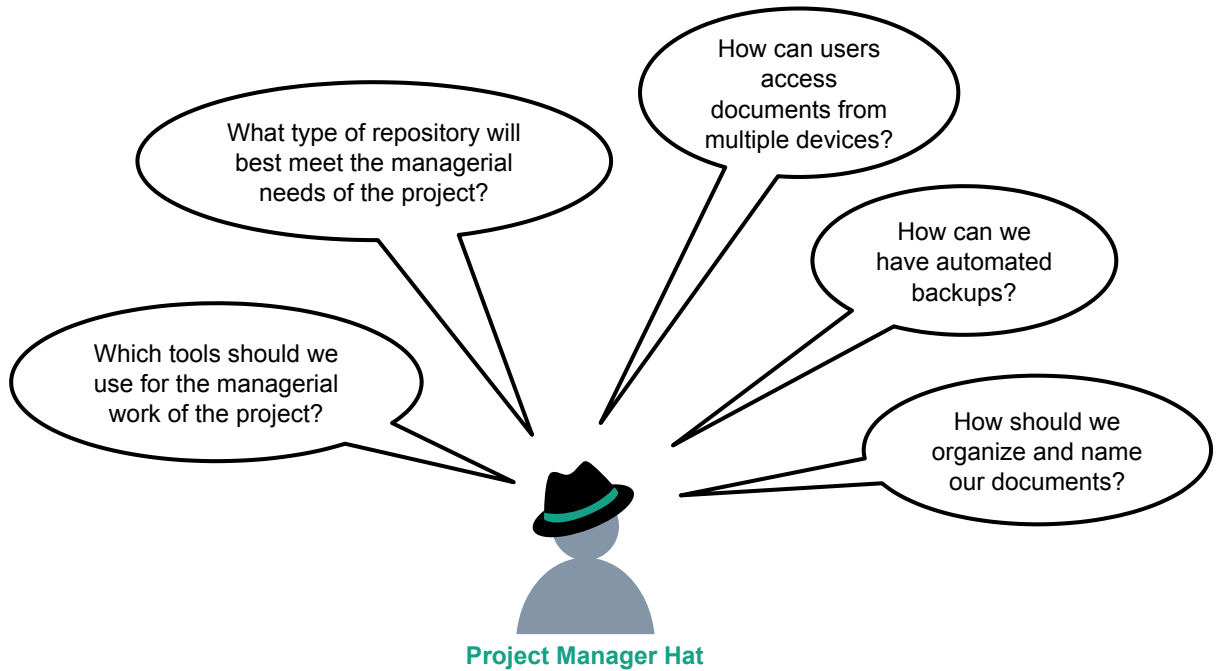
In exercises like this, have a board with 4 columns, one for each hat, and ask the teams to write each concern on a sticky note and put it on the board. In the end, review them; if something doesn't belong here, explain why. Asking your audience to move in the class and do tasks takes more time but also helps them stay awake!

A3 - Select tools and create a project repository



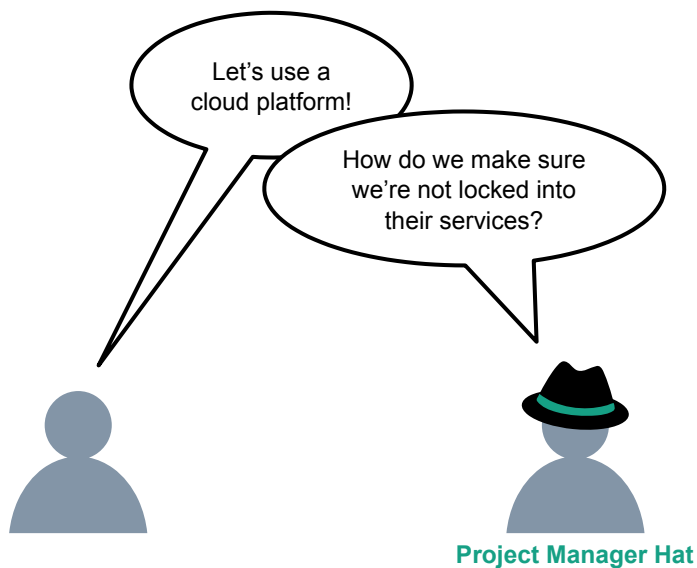
It would be helpful to give examples that your audience can relate to. Alternatively, you can ask them to give examples related to their projects.

A3 - Select tools and create a project repository



If you have enough time, ask people to give examples of how they manage their backups and whether or not they have a versioning system.

### A3 - Select tools and create a project repository



There are many “modern” platforms that have their own proprietary formats and don’t allow users to download their data in a usable form. This is horrible because no one knows whether or not they can use that data a few years from now.

Ask them if anyone has any bad experience like that, and if you need help, give your own example.

Note: Paying attention to things like this really helps have better projects.

A3 - Select tools and create a project repository



This is not a big concern for everyone, but they have to check whether they need to have such concerns.

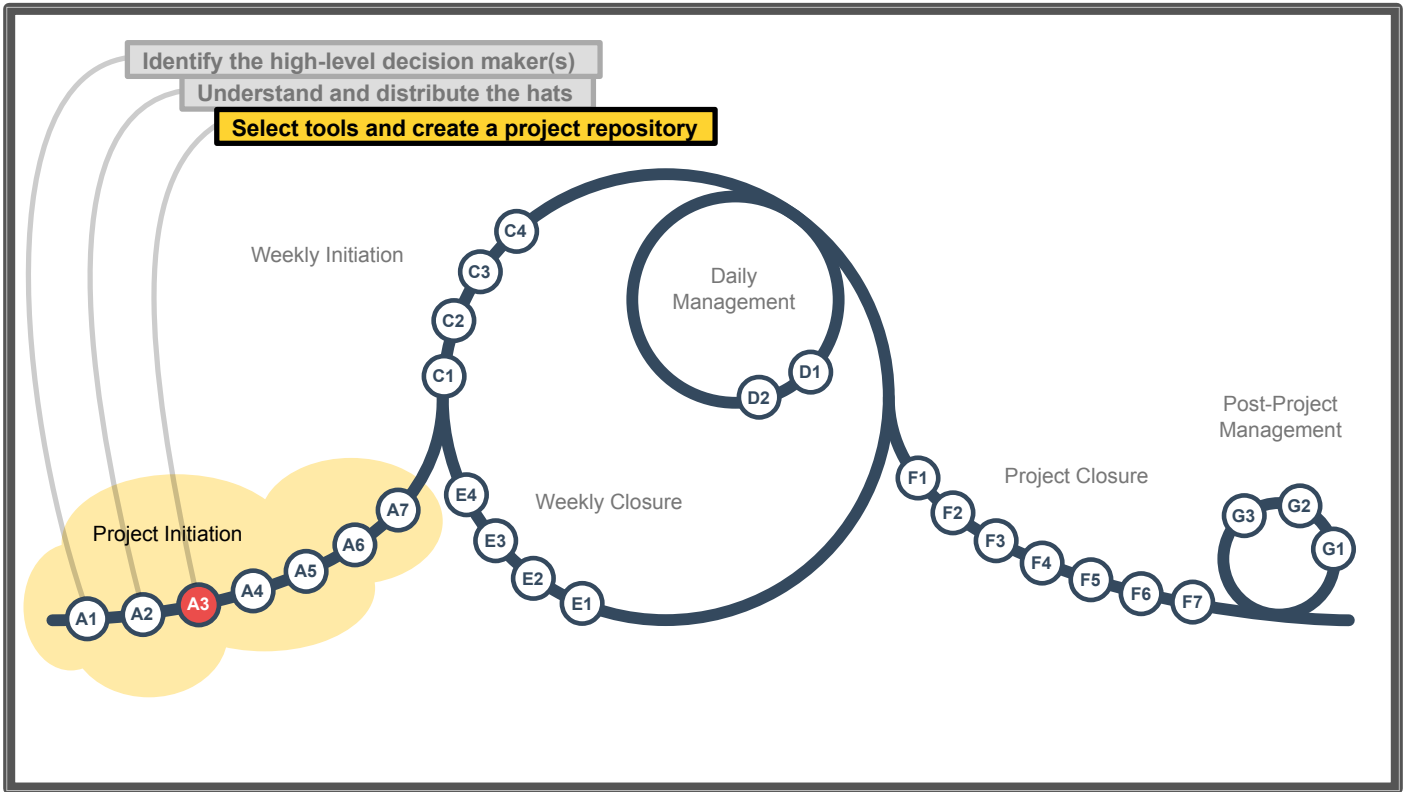


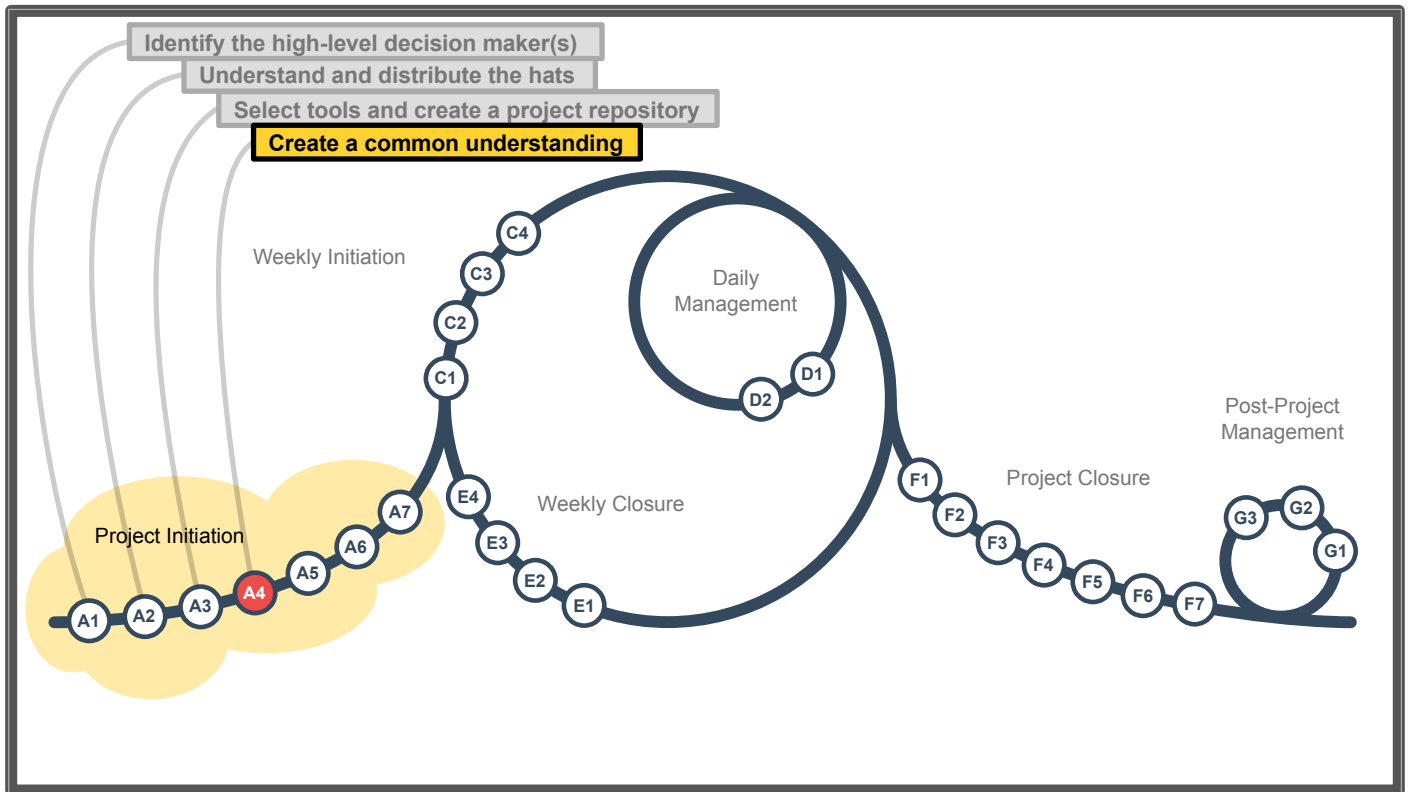


Let's say there's an artistic project, and none of the team members is a computer power user. They may be unable to come up with a good answer to questions in this activity. However, that doesn't mean they should skip them; there are many alternatives:

- Ask a friend
- Post the question on a related forum
- Hire a consultant for a day
- Etc.

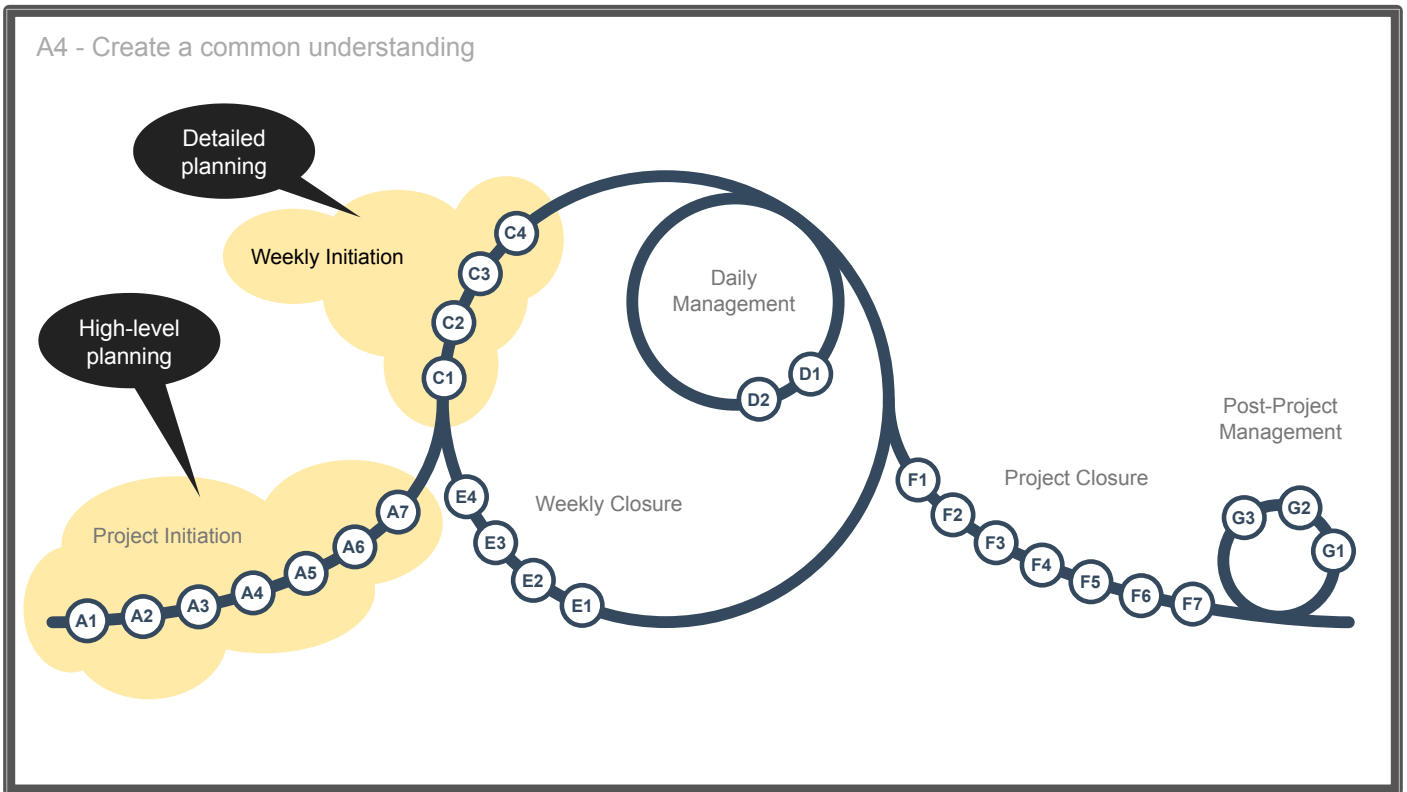
There are different sensitivity levels for the repository and tools, but it's hard to imagine a project that doesn't require them at all.





Reminder: Our goal is to create a “common understanding”. The way we do it is by creating a “plan”.

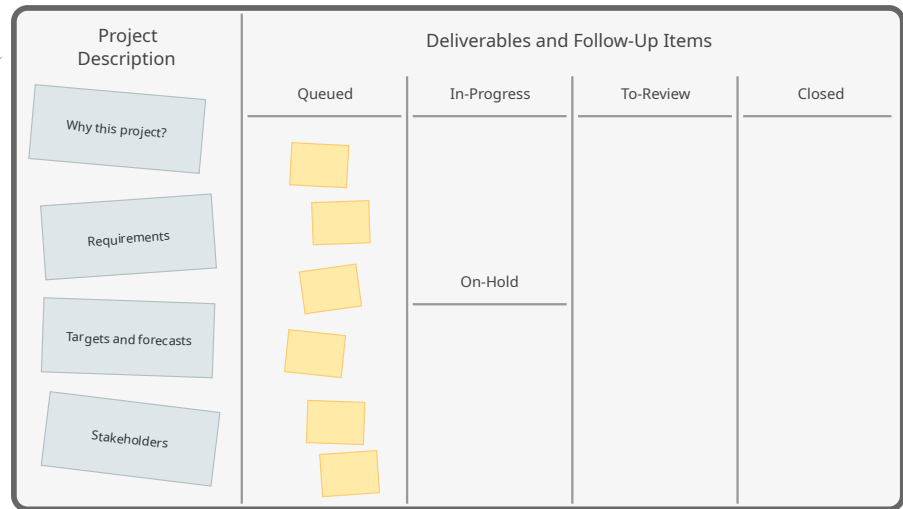
A4 - Create a common understanding



Remind them of the way we plan in micro.P3.express. Don't worry about repeating important things like this.

### Integrated Project Board

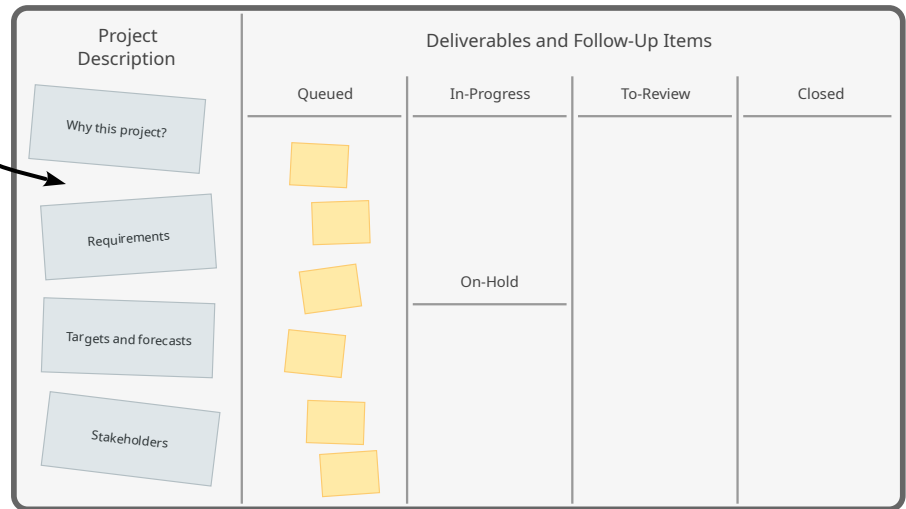
A digital or physical board



The board is designed to be easily implemented in common task board (Kanban board) software applications. So, ask them whether they use any task boards and introduce a few if you want.

### Integrated Project Board

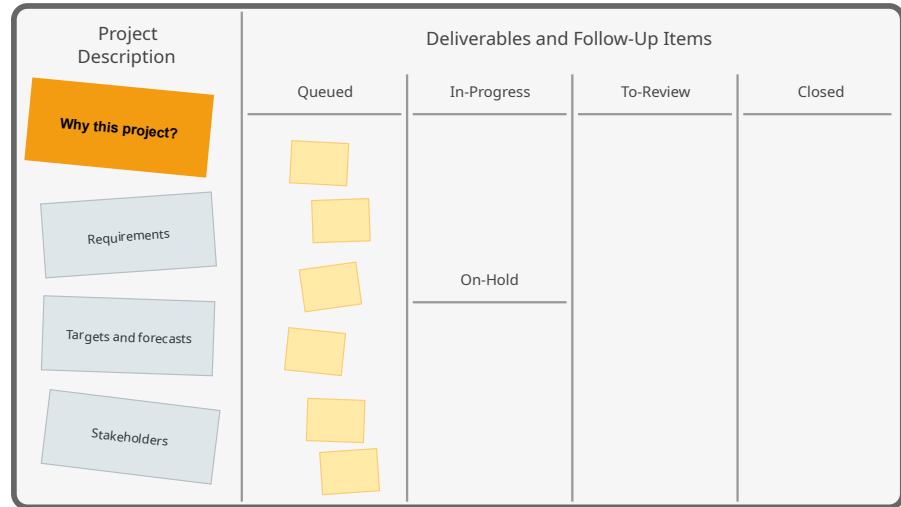
**Meta-cards**  
Remain in the first column  
Updated during the project



## Integrated Project Board

### Why this project?

*Example:*  
our website can gradually grown and has more elements than before, but still has the old structure that was suitable to a simple website, which makes it difficult for people to use it. By rebuilding the website and using a better structure, we can improve user interactions, and ultimately, sales.

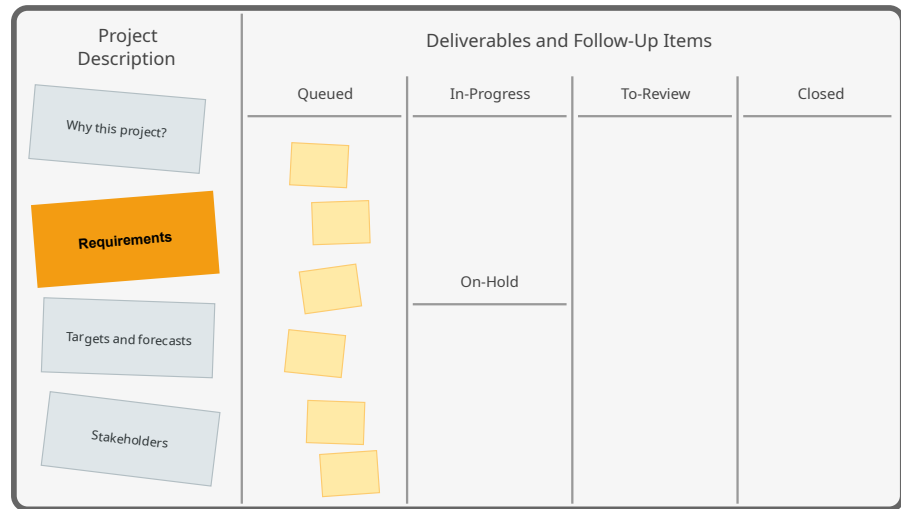


## Integrated Project Board

### Requirements

*Example:*

- It should be search engine optimized.
- It should be easy for all users to navigate.
- It should enable cross-sales.
- It should look premium.
- ...





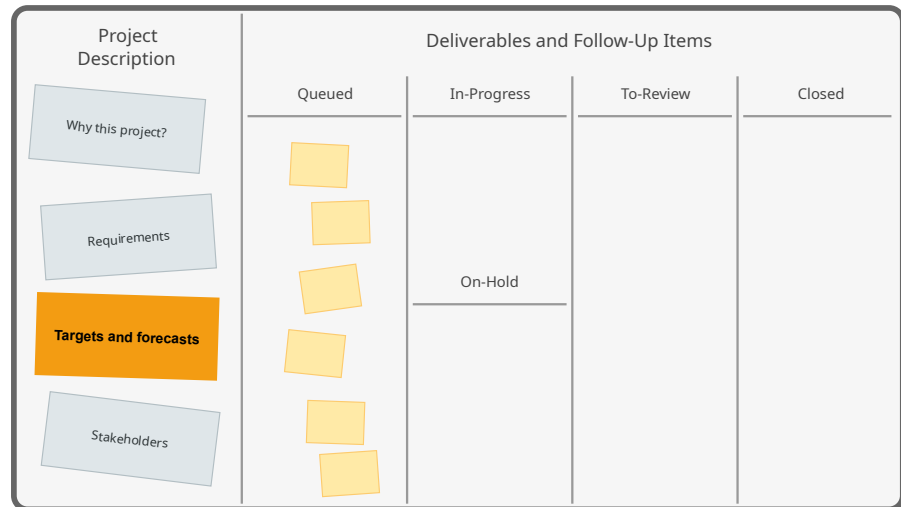
## Integrated Project Board

### Targets and forecasts

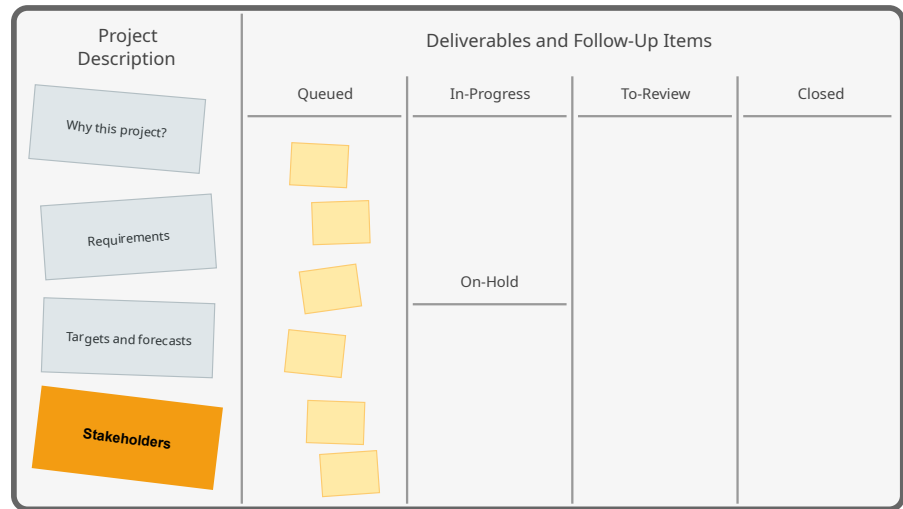
*Example:*

It should be finished before the New Year sales.

The work will be done by internal people, but we can spend up to €10k for graphic design and other outsourced aspects.



### Integrated Project Board



**Stakeholder:**

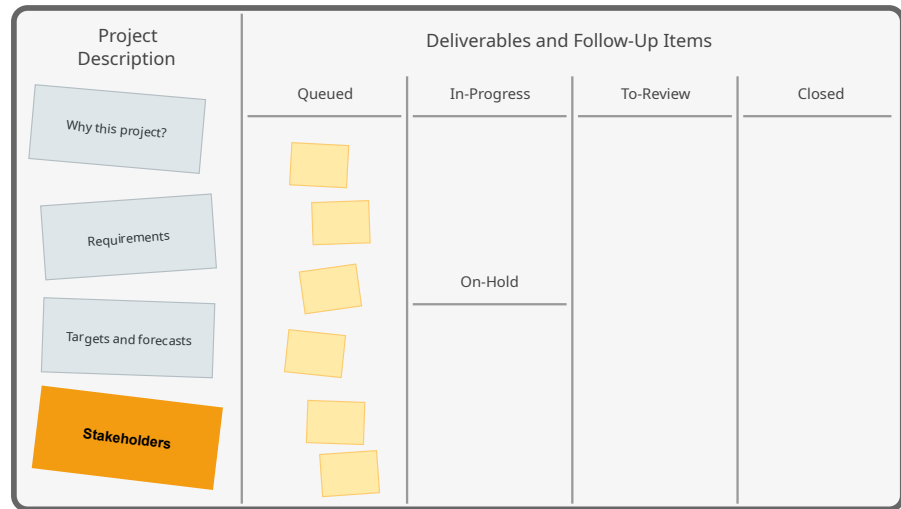
Anyone who has an interest in the project and can impact it.

## Integrated Project Board

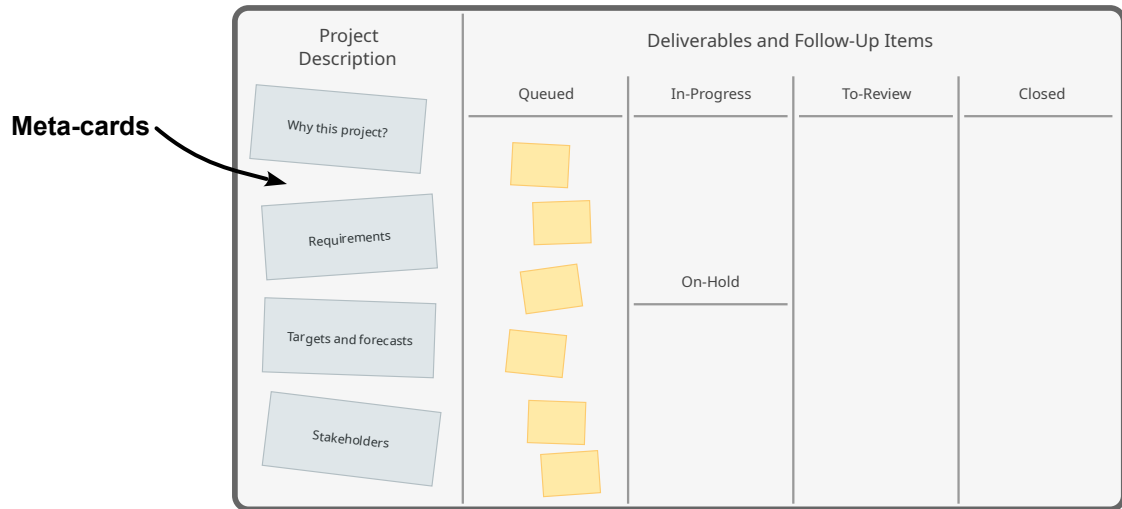
### Stakeholders

*Example:*

- Monet, the CEO
- Fede, the COO & sponsor
- Kyung, account manager
- Jehan, our biggest competitor
- Mirai, our main supplier
- GDPR authority
- Customer Protection Agency
- ...



### Integrated Project Board

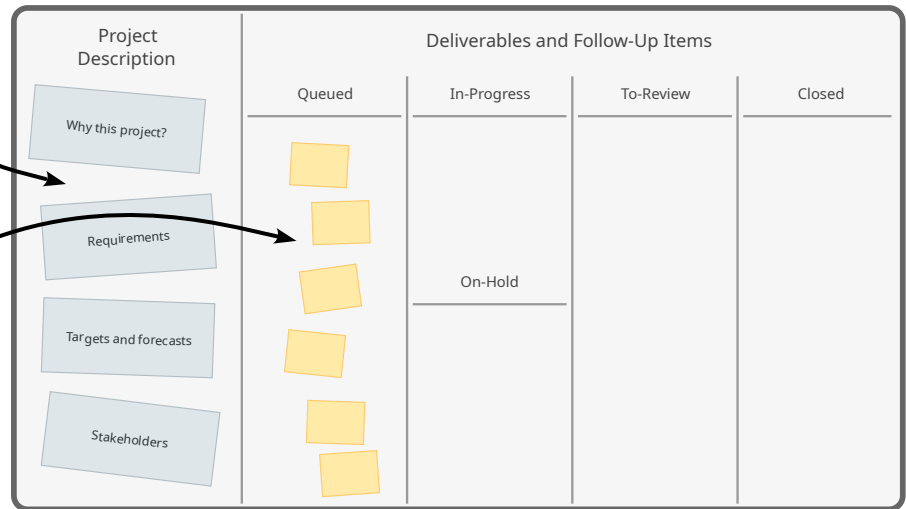


If you have time, you can ask them to form teams of 2 to 5 and prepare the meta-cards of a sample project. Then ask them to present them and correct them with the help of other candidates; e.g., most people note down deliverables as requirements, so help them extract the real requirements behind those deliverables.

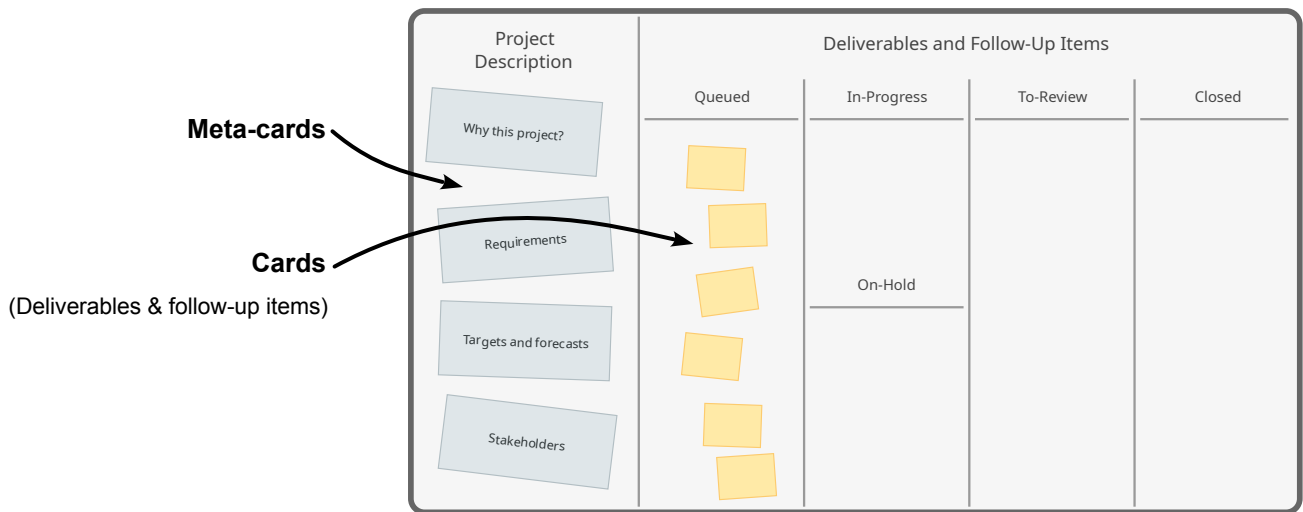
### Integrated Project Board

**Meta-cards**  
Remain in the first column

**Cards**  
Should ultimately move to the "closed" column.



### Integrated Project Board



### Integrated Project Board

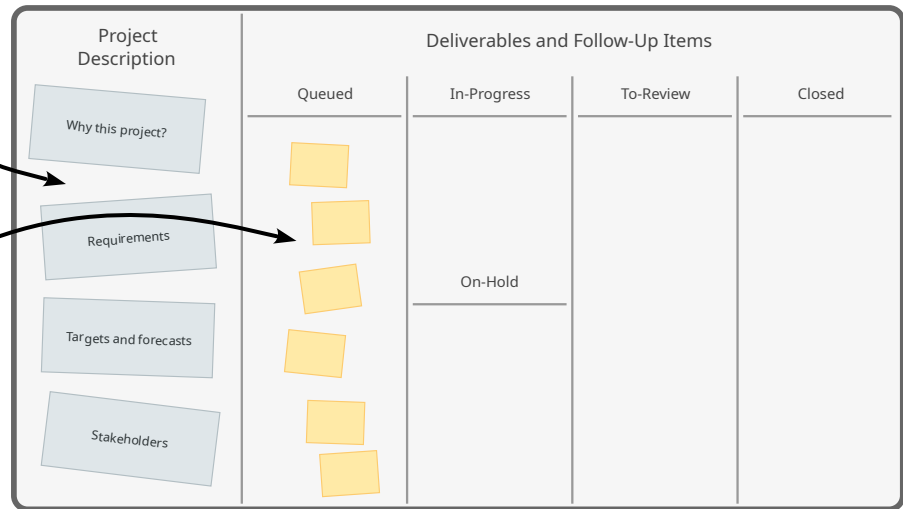
**Meta-cards**

**Cards**

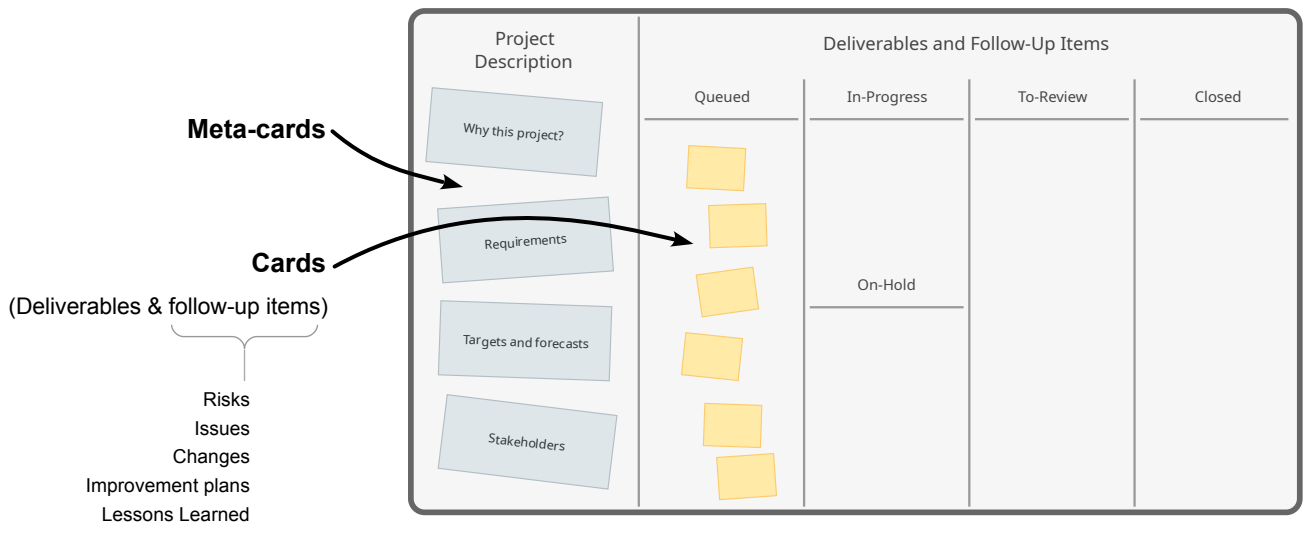
(Deliverables & follow-up items)

Deliverables examples:

- Payment gateways
- Discount coupons
- ...

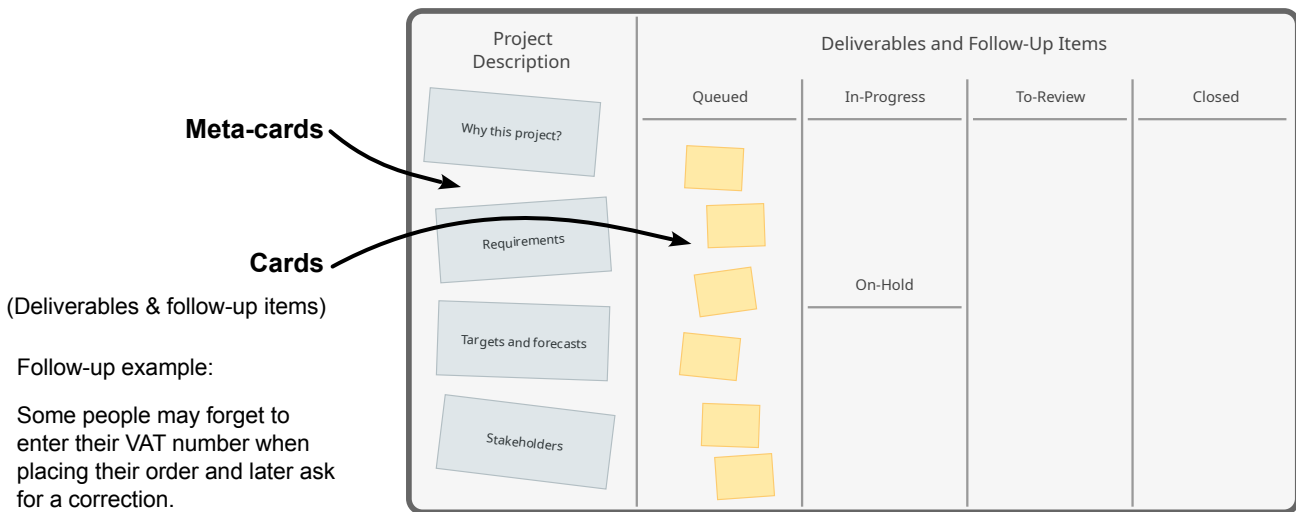


### Integrated Project Board





### Integrated Project Board

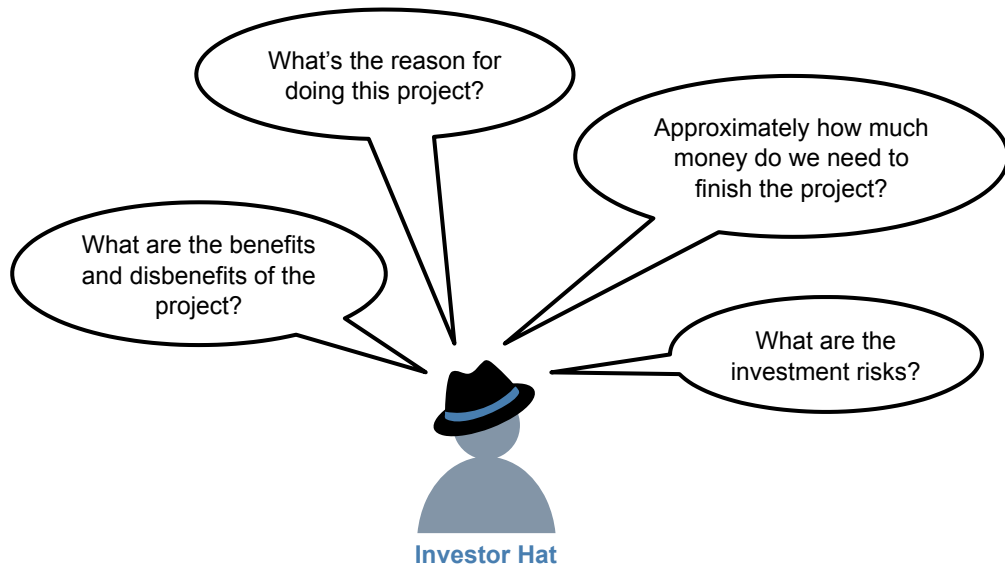


If you have time, ask them to continue their last exercise and create a few deliverables and follow-up items for the project.

One more thing: The manual mentions that you can use a Deliverables Map (the P3.express concept) to help identify deliverables in more complicated micro-projects. It's not included in the slides, as most micro-projects won't need it, but feel free to mention it if needed. In that case, park the topic, and return to it after finishing the slides. If you have enough time, you can tell them more about the Deliverables Map and give them an exercise. Regardless, make sure you're not spending too much time on it.

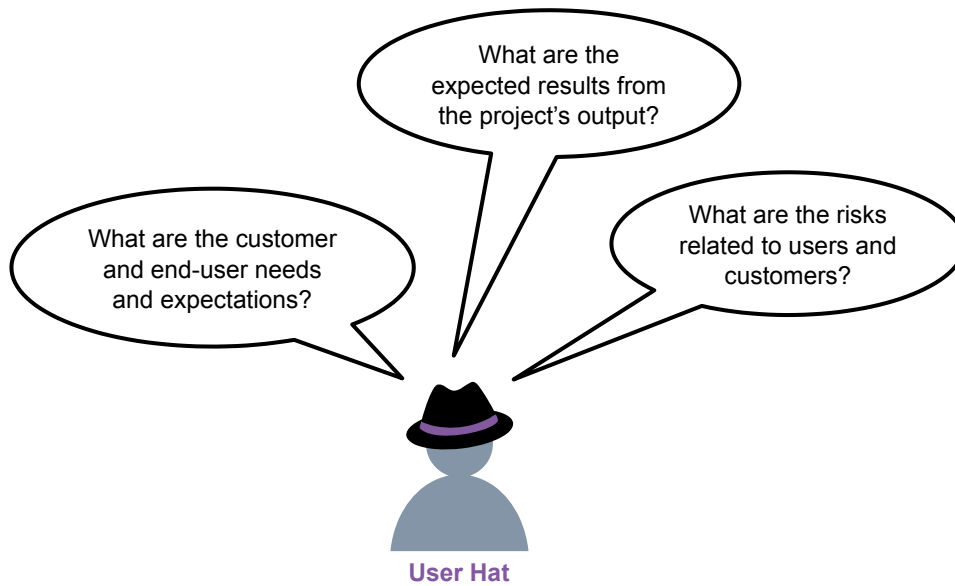
What concerns do you think each hat should have  
in this management activity?





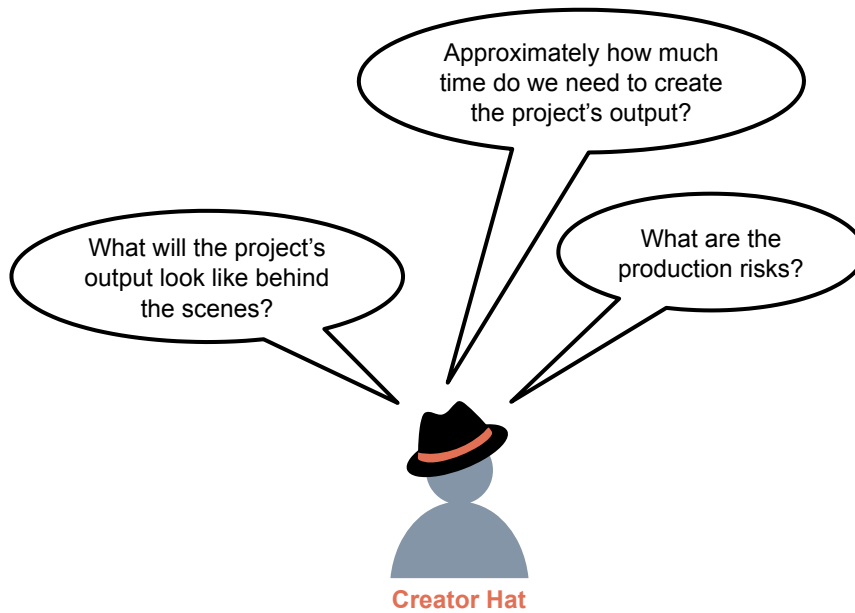
Optionally, ask them in which meta-card the answer to each of these concerns should be recorded.

A4 - Create a common understanding



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A4 - Create a common understanding



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A4 - Create a common understanding

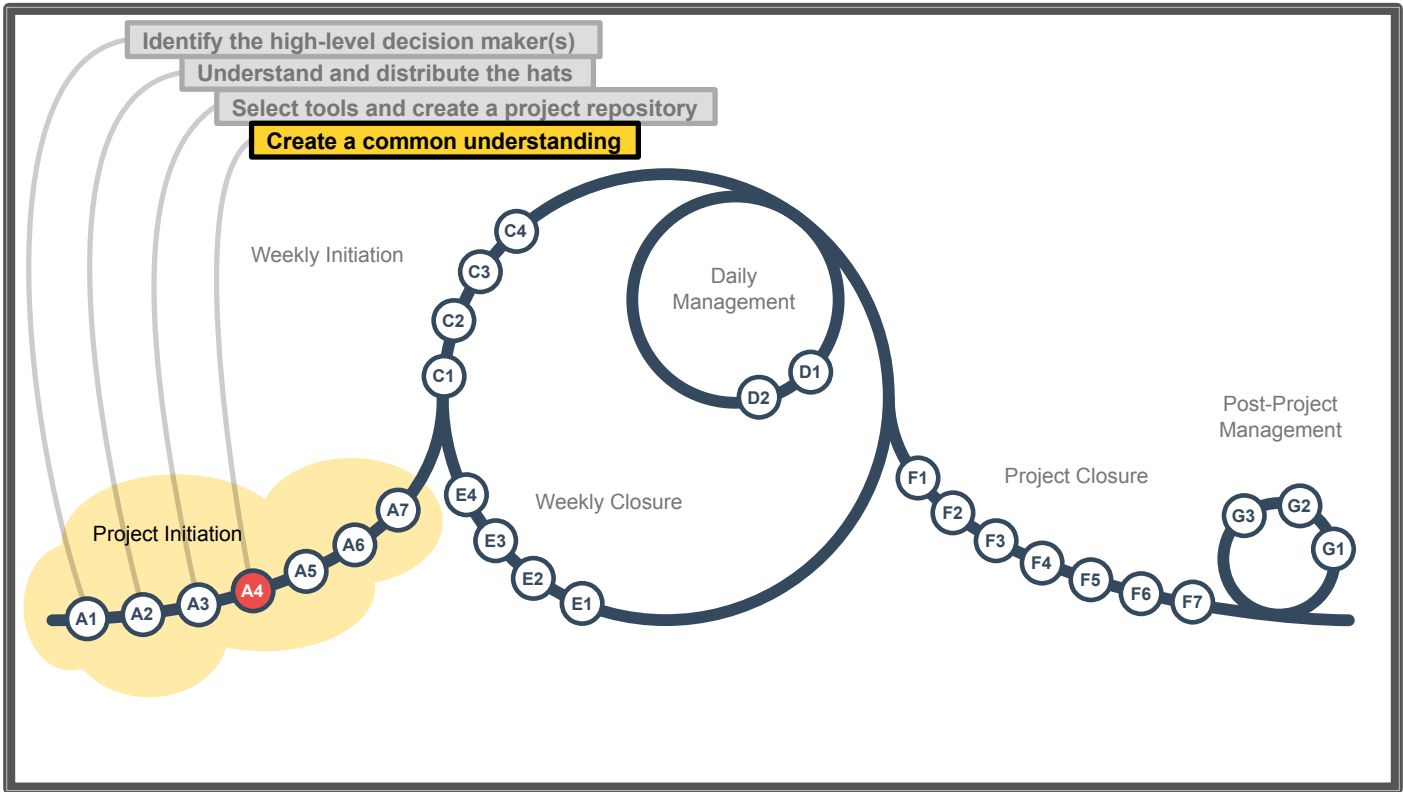


Optionally, ask them in which meta-card the answer to each of these concerns should be recorded.

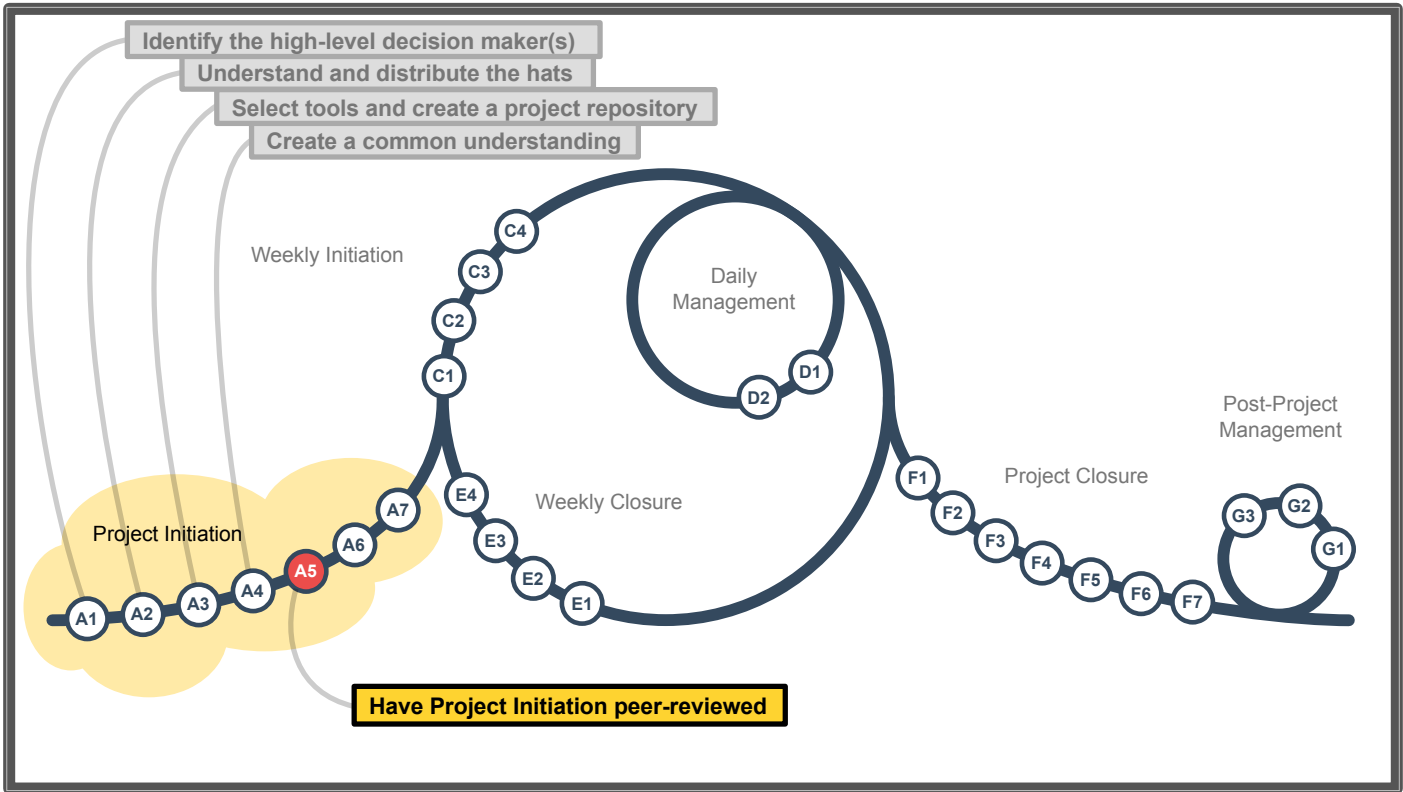


This concern is key and repeats in many activities. That's why it has a different color.

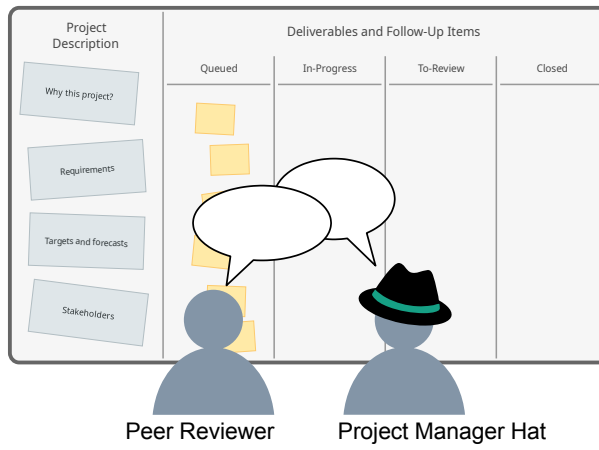
Talk to them a little about it, and maybe ask them why it's important to have such a concern and what happens if their documents are not clear and understandable. Make sure its impact on both the current project and future projects is discussed.



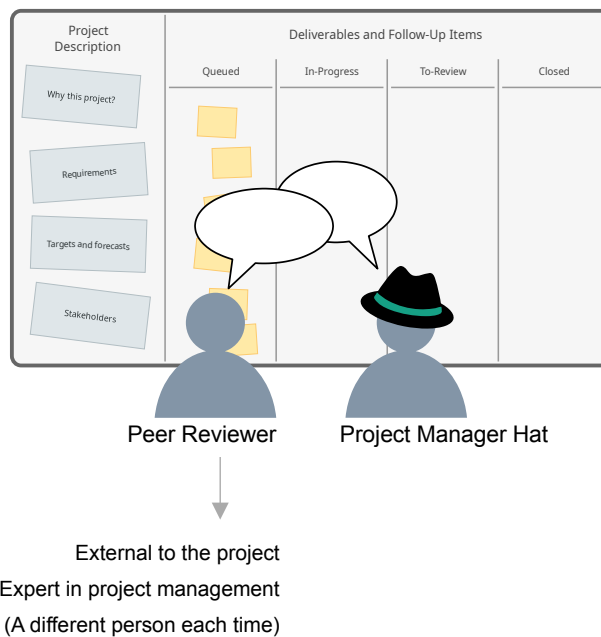




## A5 - Have project initiation peer-reviewed



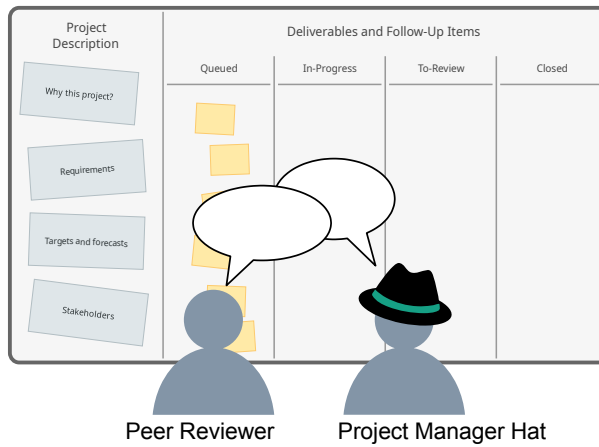
## A5 - Have project initiation peer-reviewed



A frequently asked question: What if we use one of the team members for the peer review instead of someone external to the team?

Team members are already involved in everything. They are aware of what's happening, and if they have any opinion, they have already expressed it. What we need for peer review is a fresh set of eyes. So, the answer is no; reviewing the work with internal team members doesn't satisfy this activity.

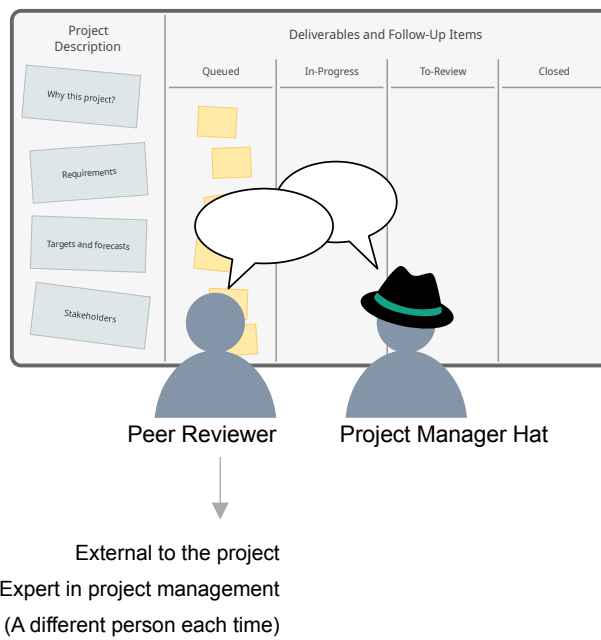
## A5 - Have project initiation peer-reviewed



External to the project  
Expert in project management  
(A different person each time)

- ★ Helps find mistakes
- ★ Both learn from each other

## A5 - Have project initiation peer-reviewed



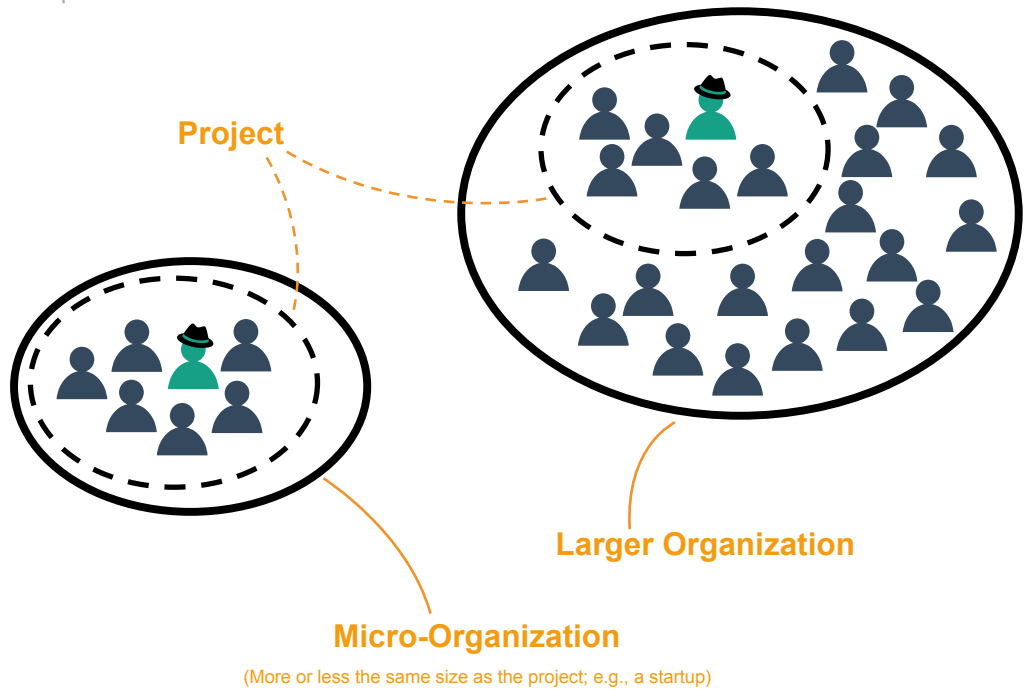
- ★ Helps find mistakes
- ★ Both learn from each other



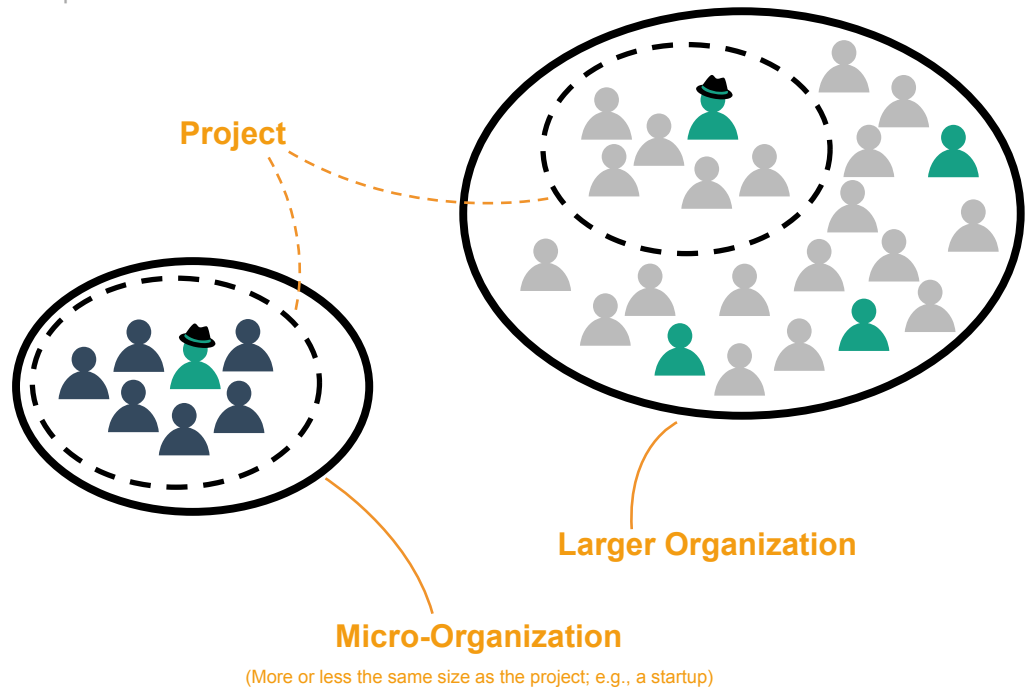
Do other hats need peer-reviews as well?

Peer reviews for the project manager hat are necessary in micro.P3.express. It's not necessary for other hats, but they are encouraged to consider it.

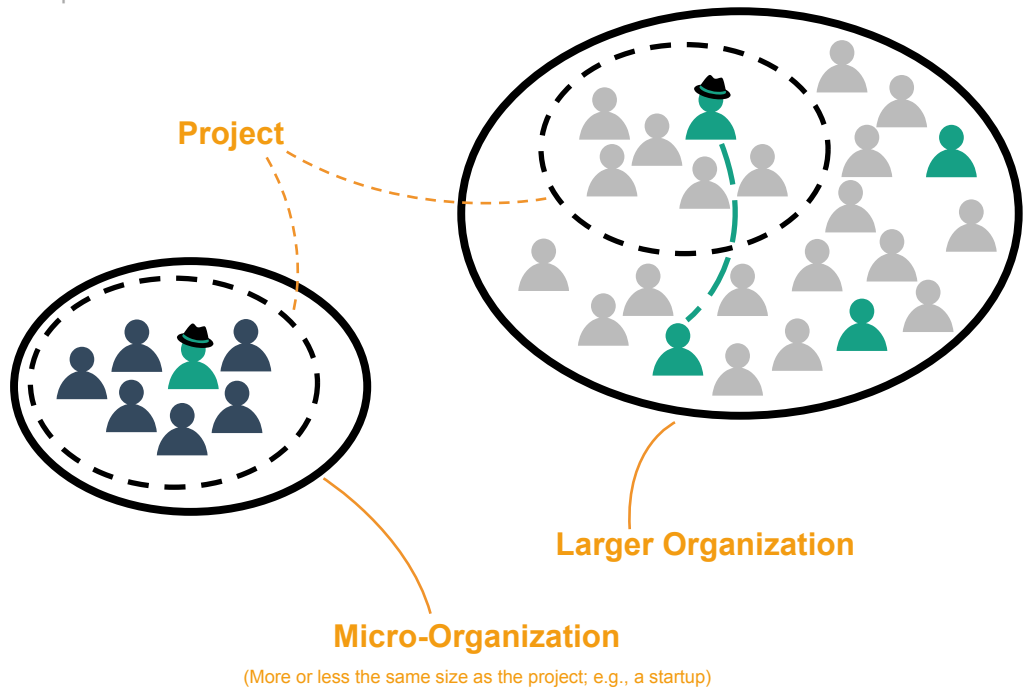
A5 - Have project initiation peer-reviewed



A5 - Have project initiation peer-reviewed

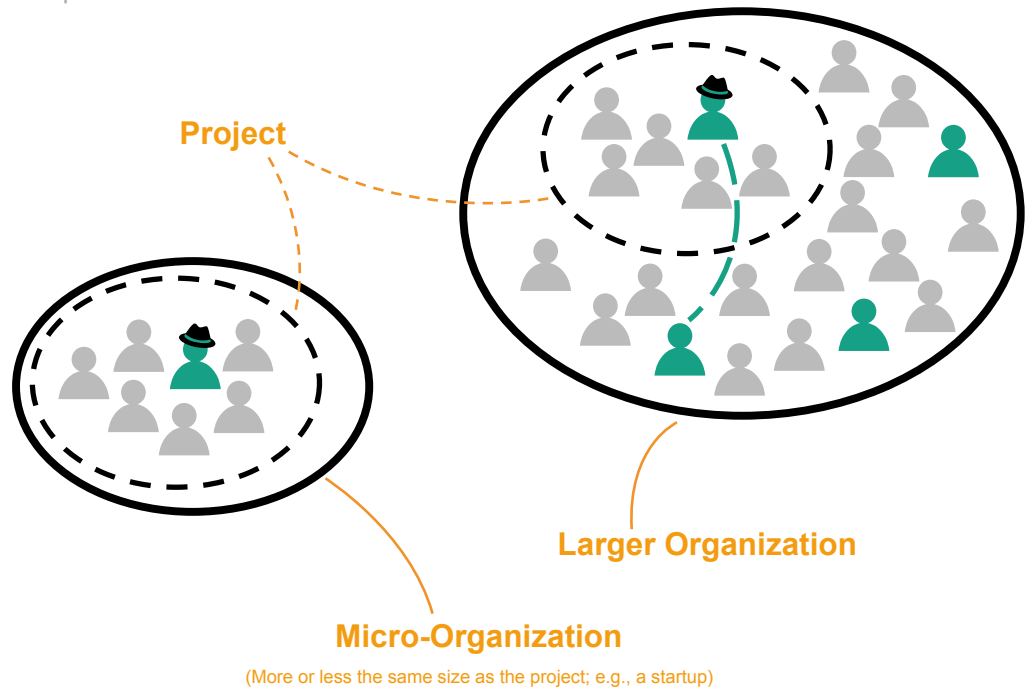


A5 - Have project initiation peer-reviewed

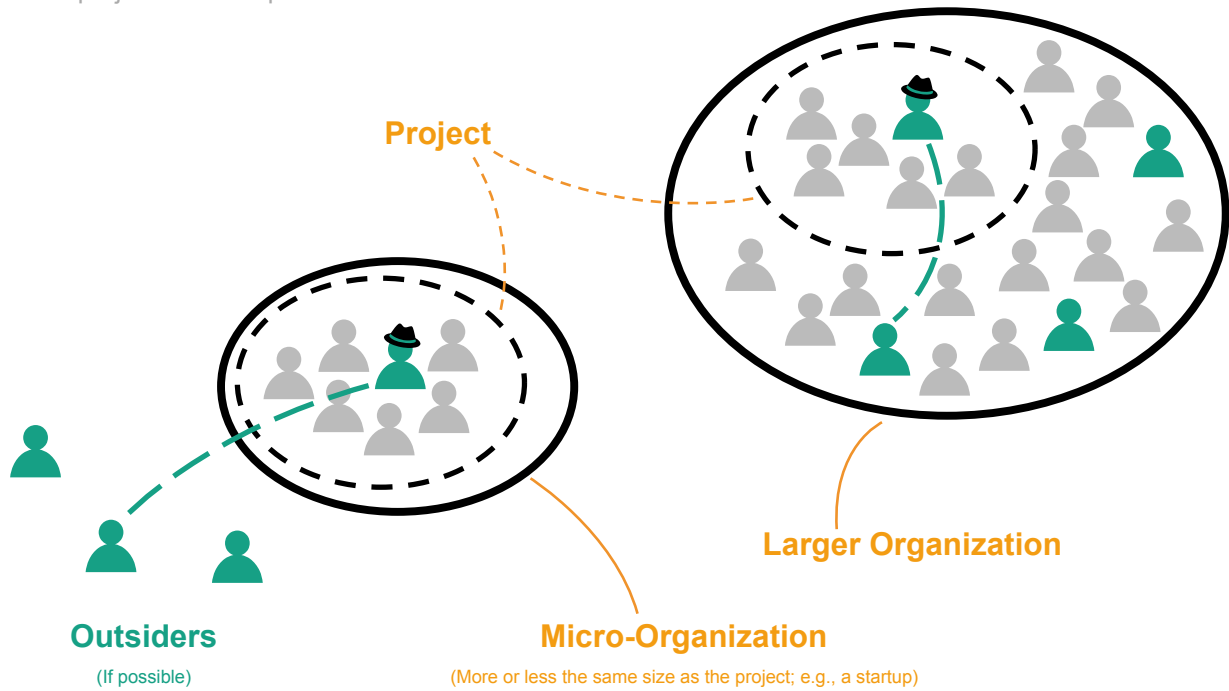




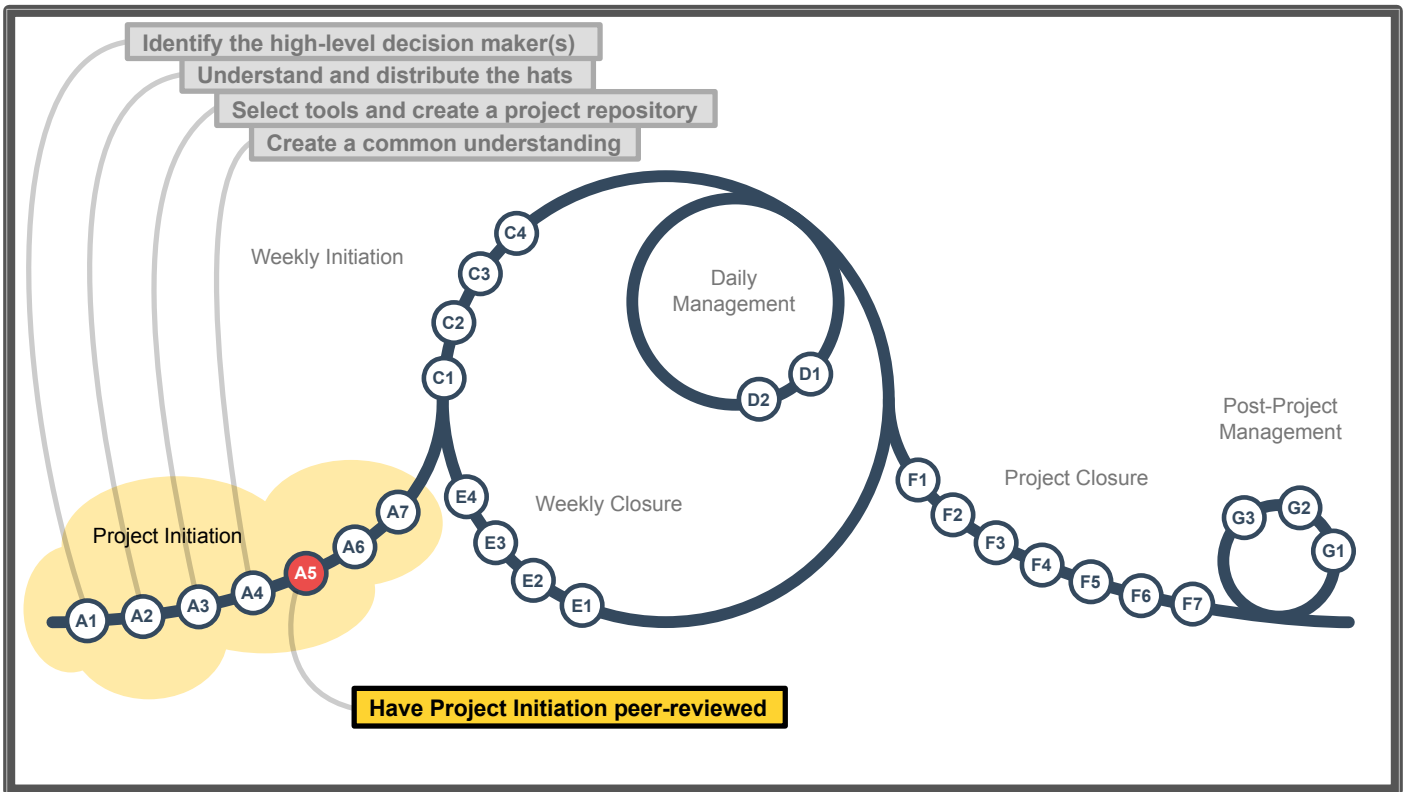
A5 - Have project initiation peer-reviewed

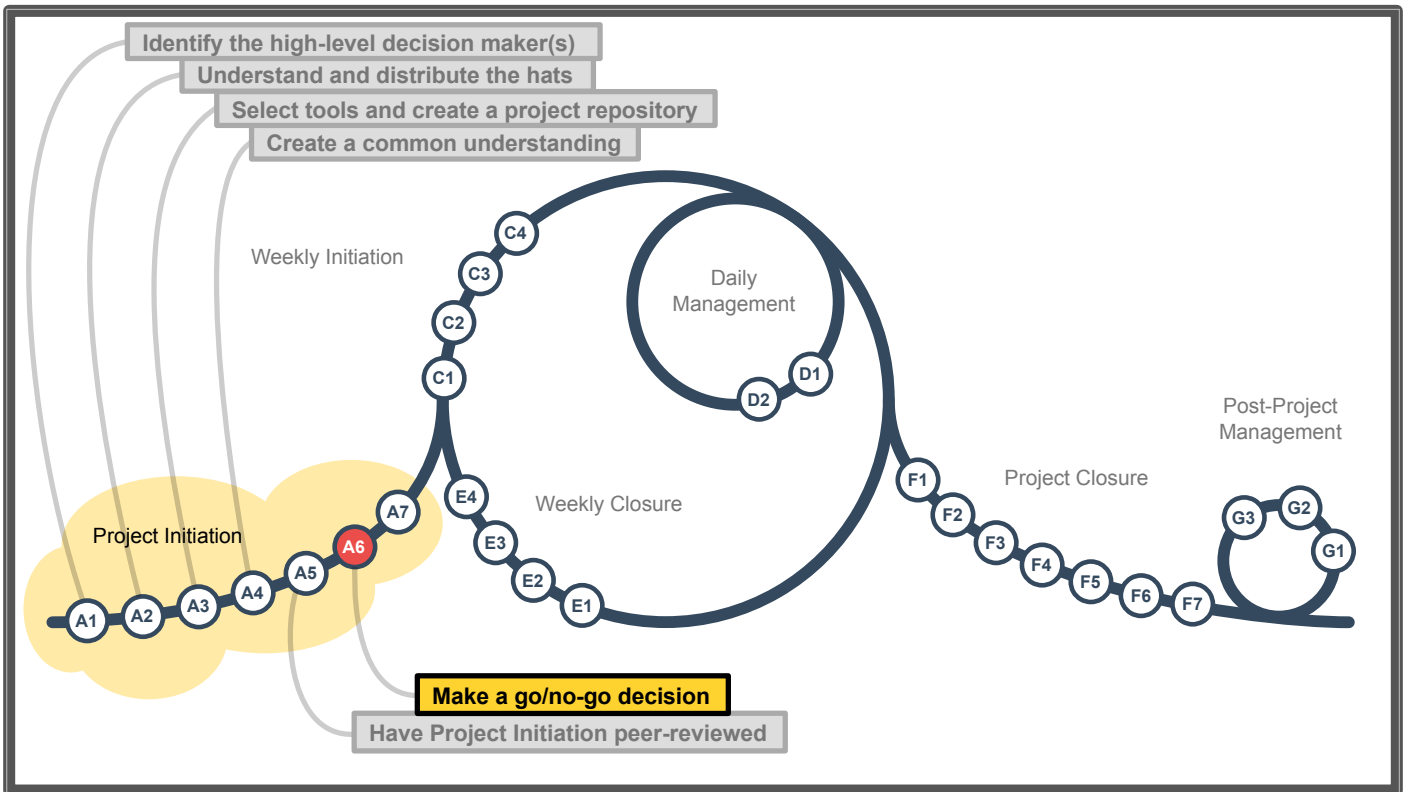


A5 - Have project initiation peer-reviewed



Optionally, explore a few ideas about the outsiders as peer reviewers. One option is to get help from ex-colleagues. Another is for some of them in the class to make a deal with each other and peer review each other's projects in the future.





What concerns do you think each hat should have in this management activity?



A6 - Make a go/no-go decision

Do we have a proper, consistent understanding of and foundation for the project?



**Project Manager Hat**

A6 - Make a go/no-go decision



**Creator Hat**

A6 - Make a go/no-go decision

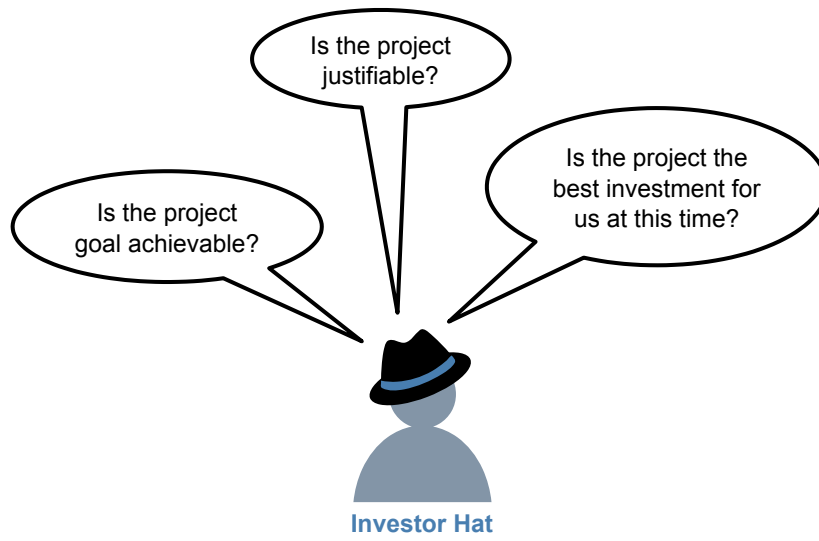
Is the existing definition  
of the project's output  
suitable for end users?



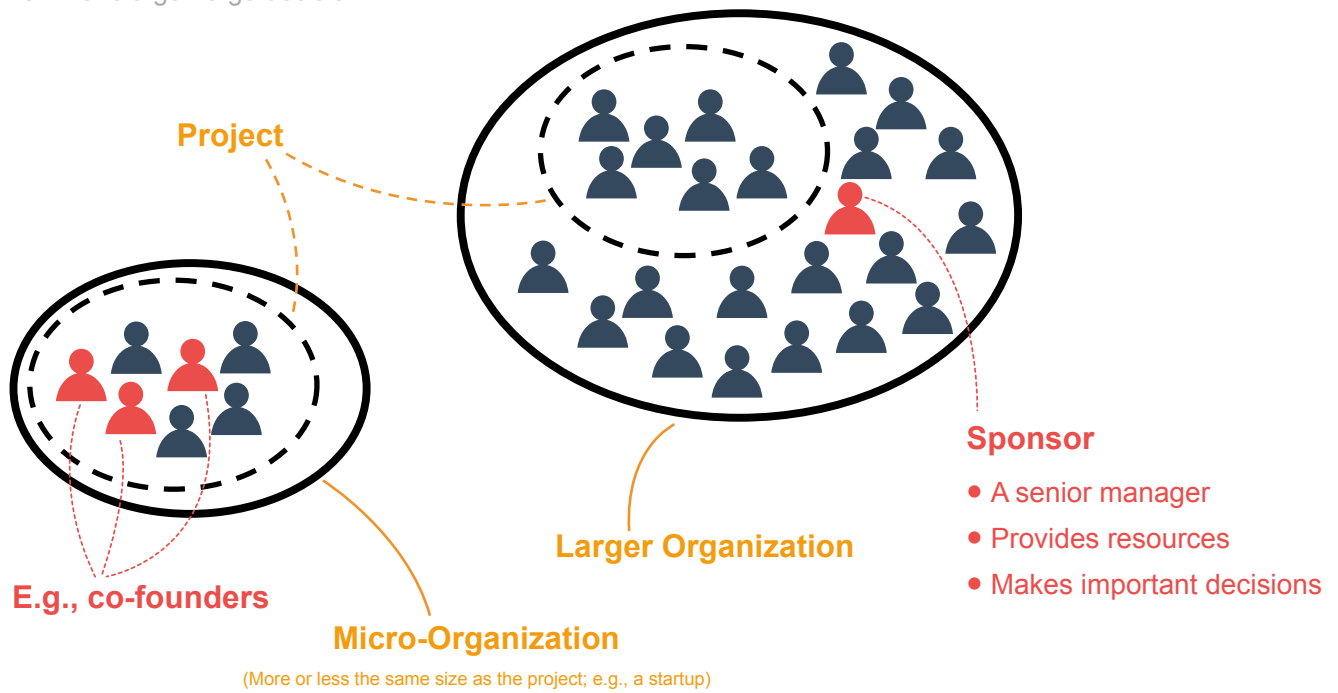
User Hat



A6 - Make a go/no-go decision

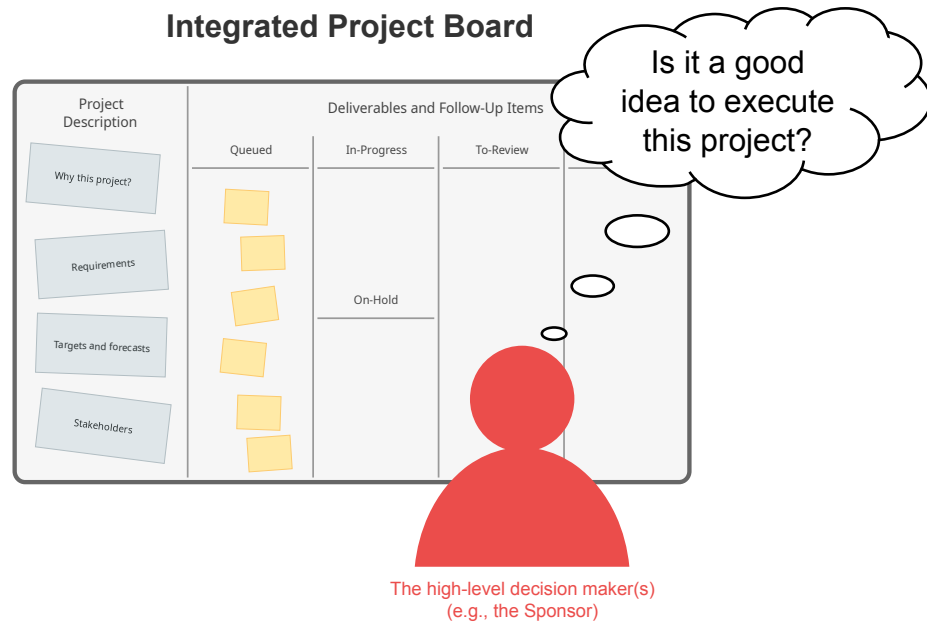


A6 - Make a go/no-go decision

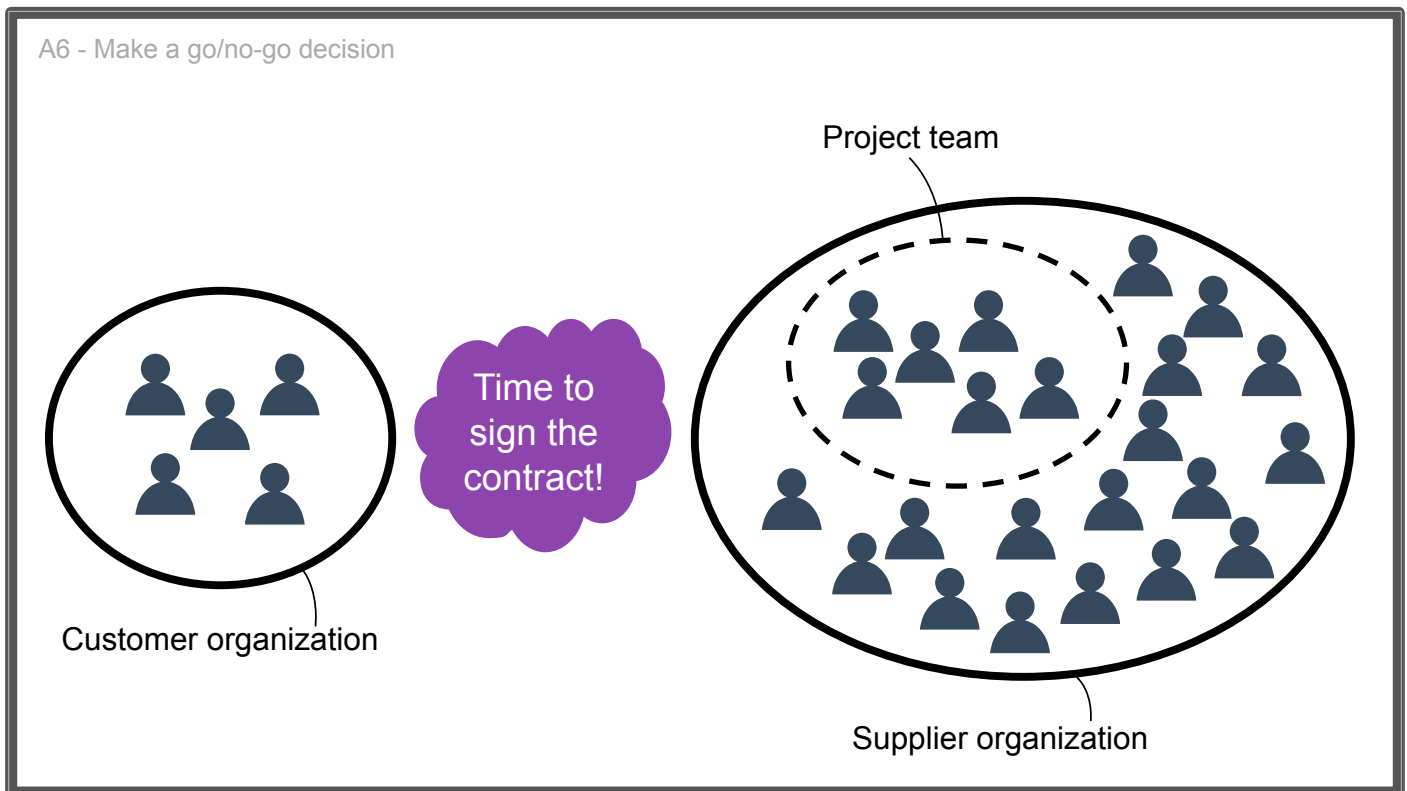


Remind them who the high-level decision-makers are.

### Integrated Project Board

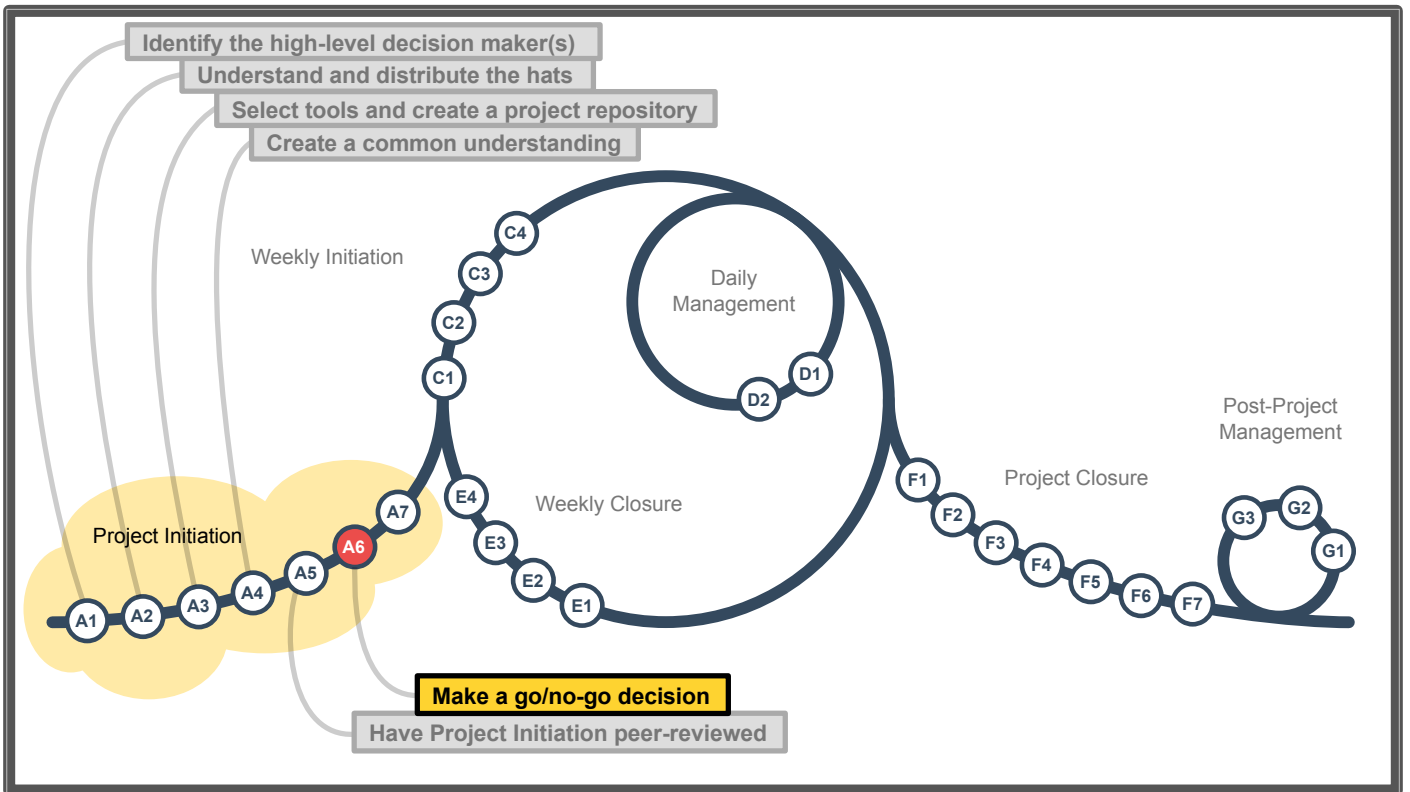


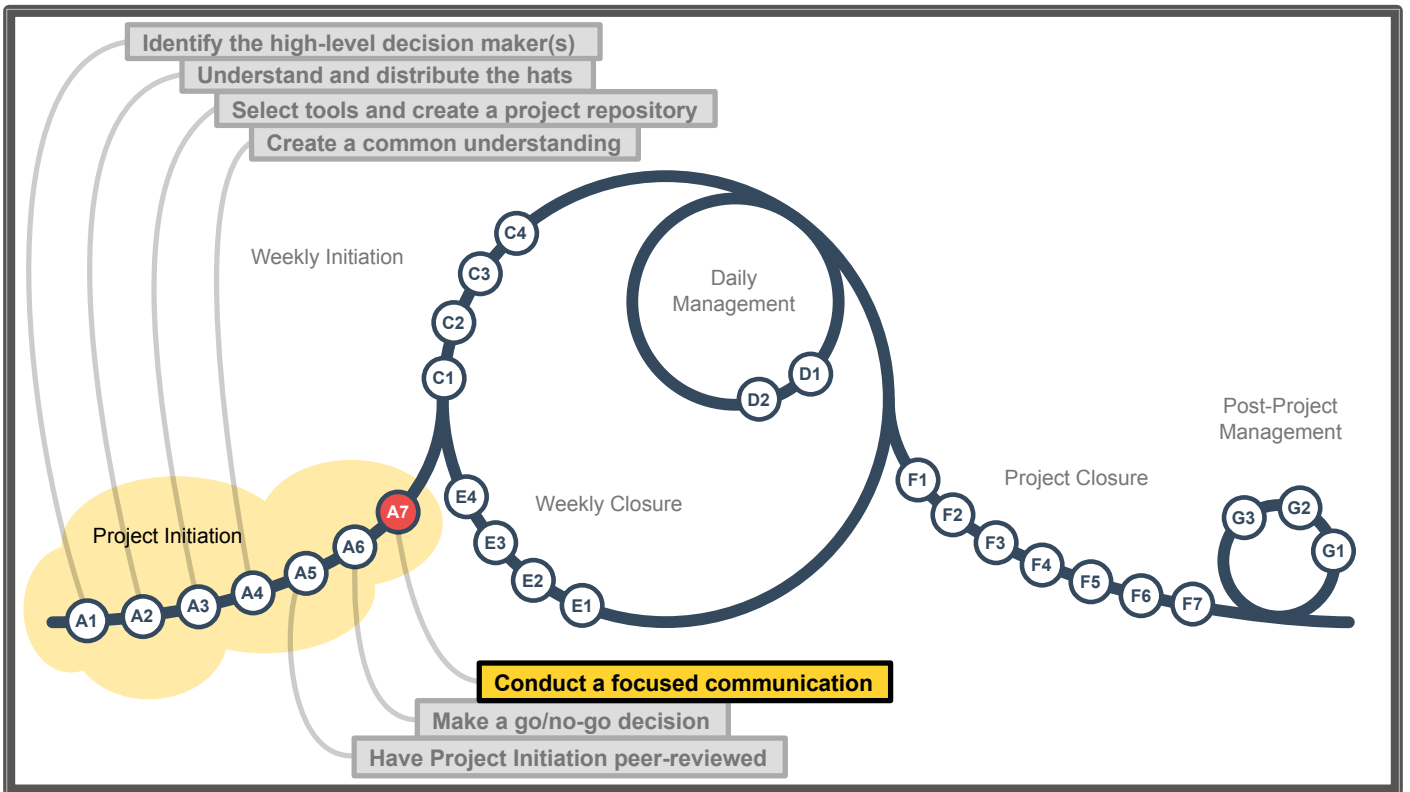
Our common understanding (plan), reflected in the Integrated Project Board, is the basis for decisions.



If they have an external customer, this is when they send them their proposal, and if the customer agrees, they will sign a contract and proceed with the project.

Remind them that we don't want a separate team responsible for initiating and signing a contract and then handing it over to an execution team. Instead, we want the same team who will execute the project to initiate it. If, for example, there's a contract management department, they would assign one of their staff to the project to ensure initiation is done correctly. This person can remain in the team to make sure the project works well from a legal and contractual perspective. When so, the Investor Hat may suit them well.

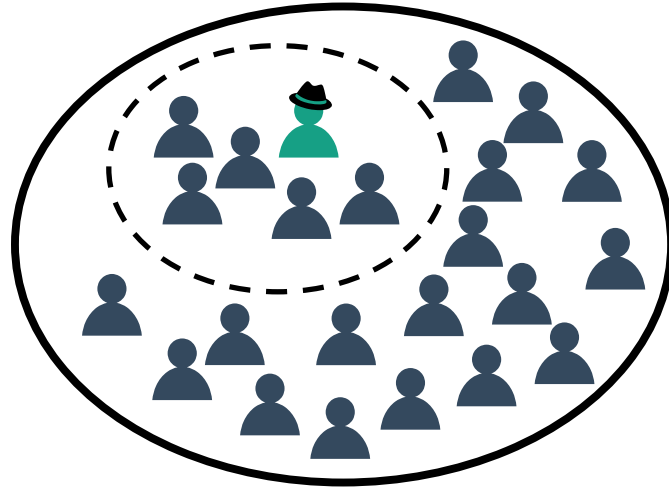




What are the advantages of informing everyone in the organization that we're going to start working on a new project?

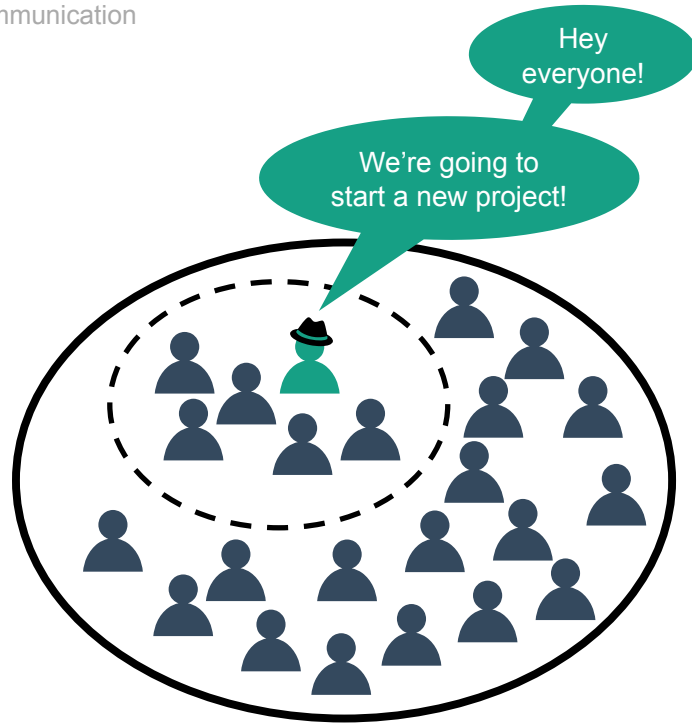


A7 - Conduct a focused communication

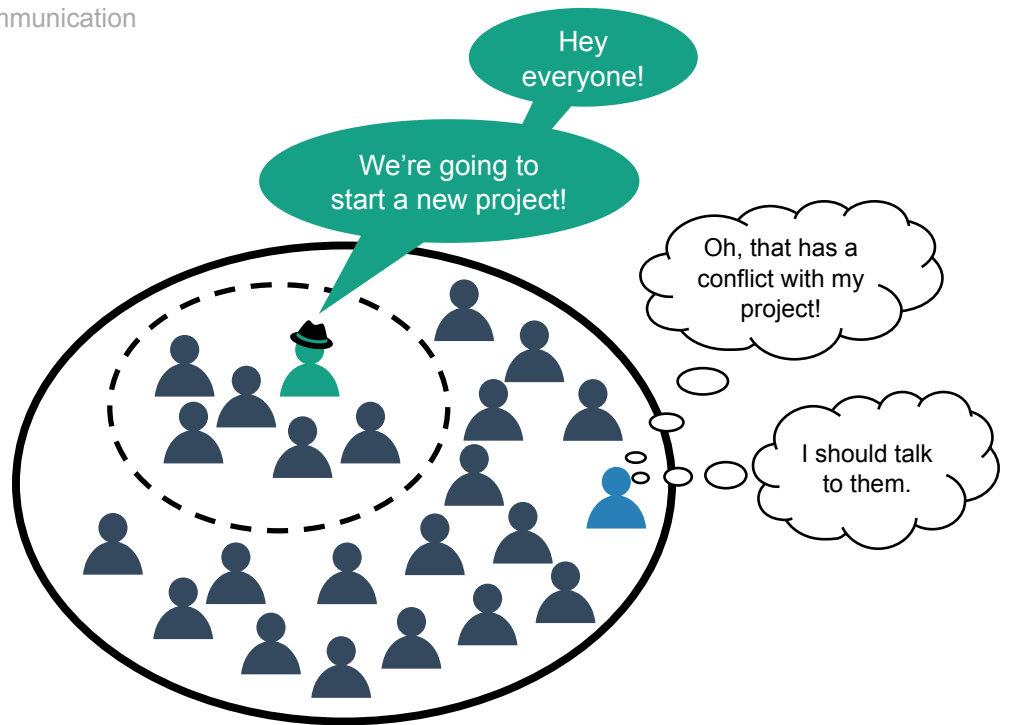




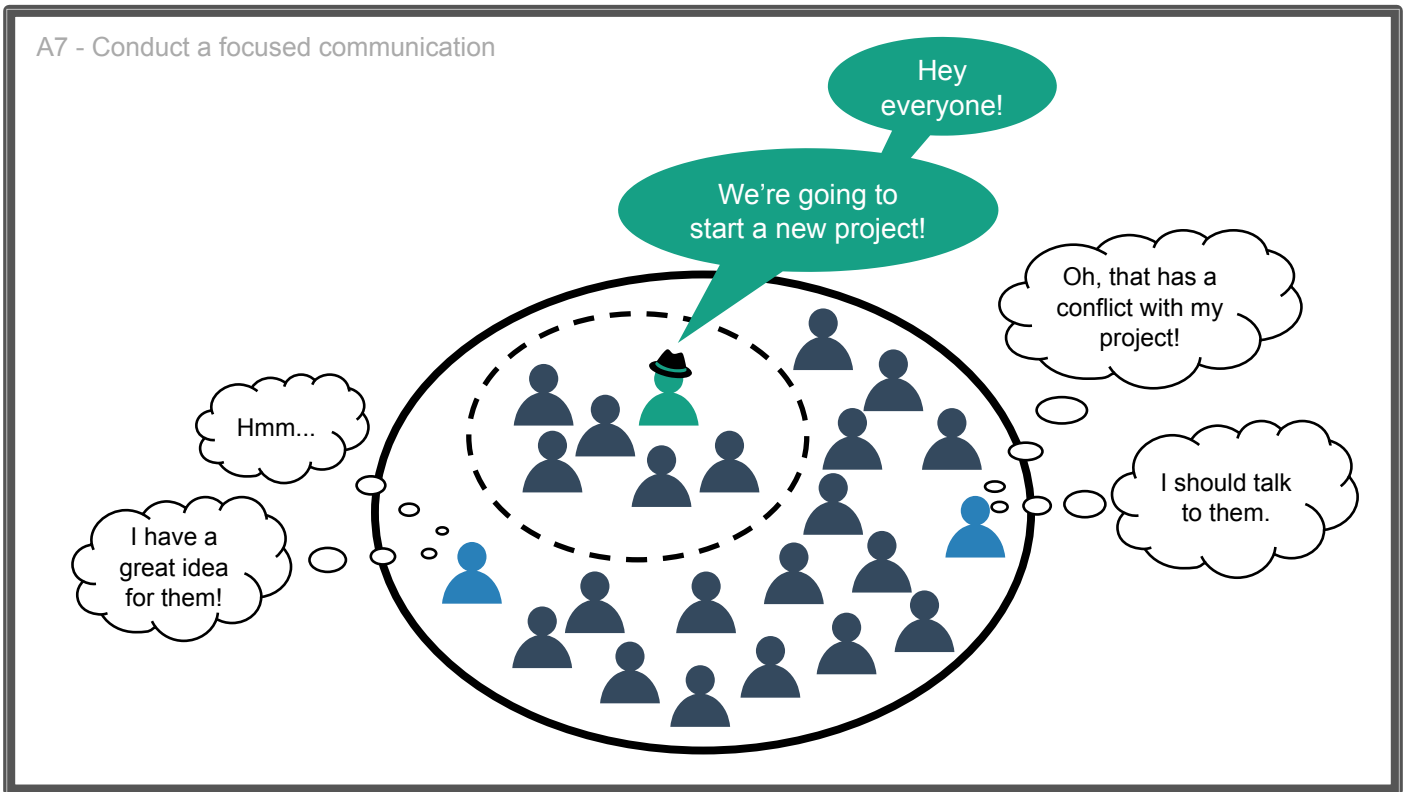
A7 - Conduct a focused communication



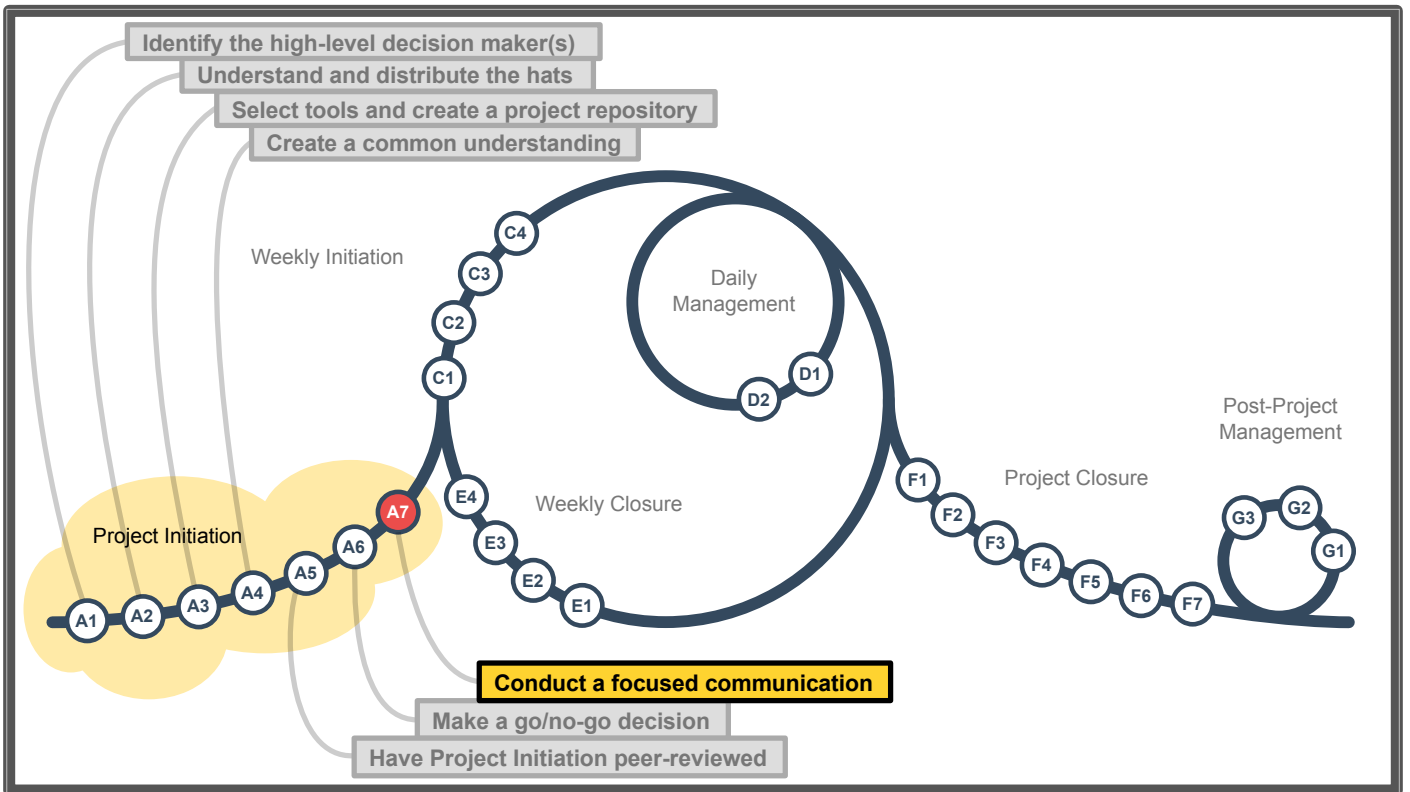
A7 - Conduct a focused communication

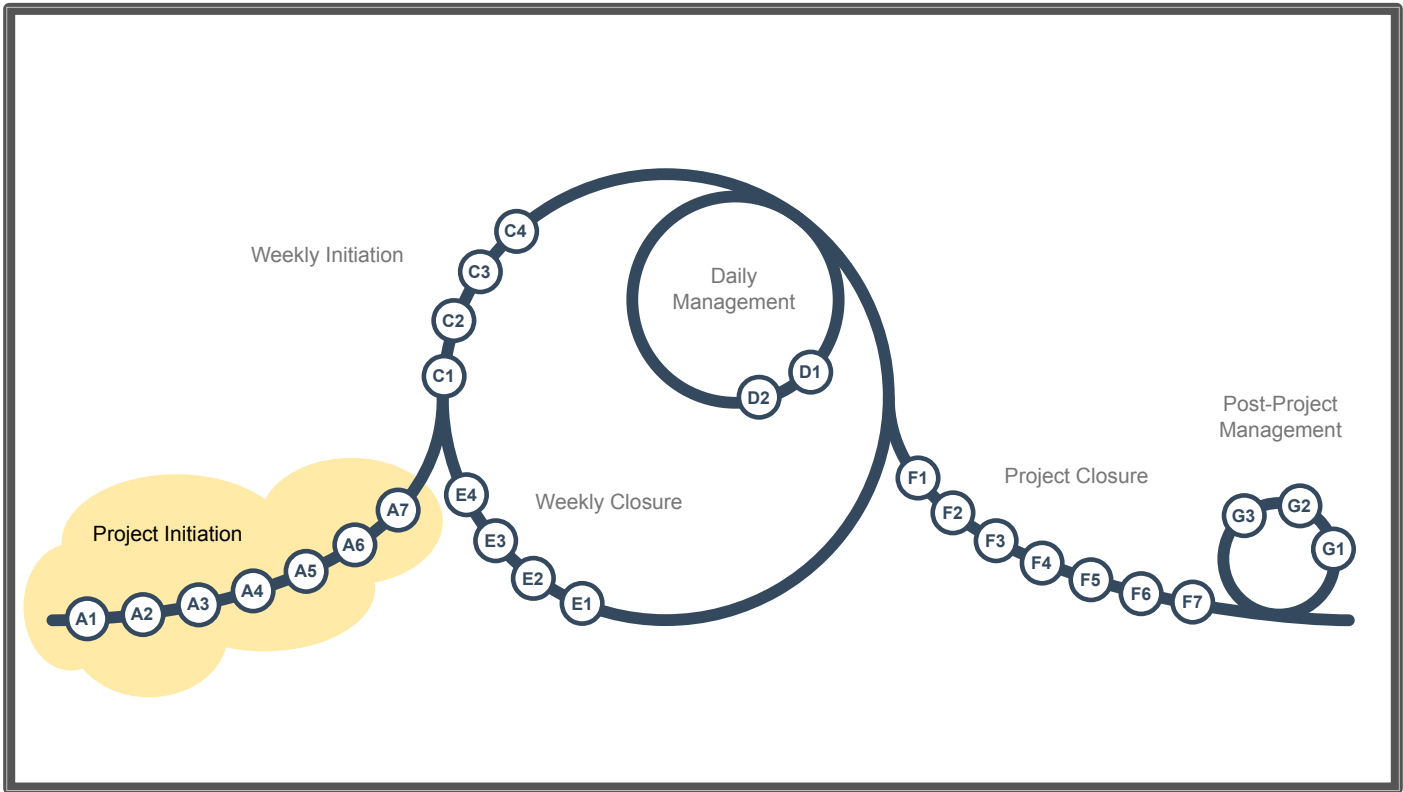


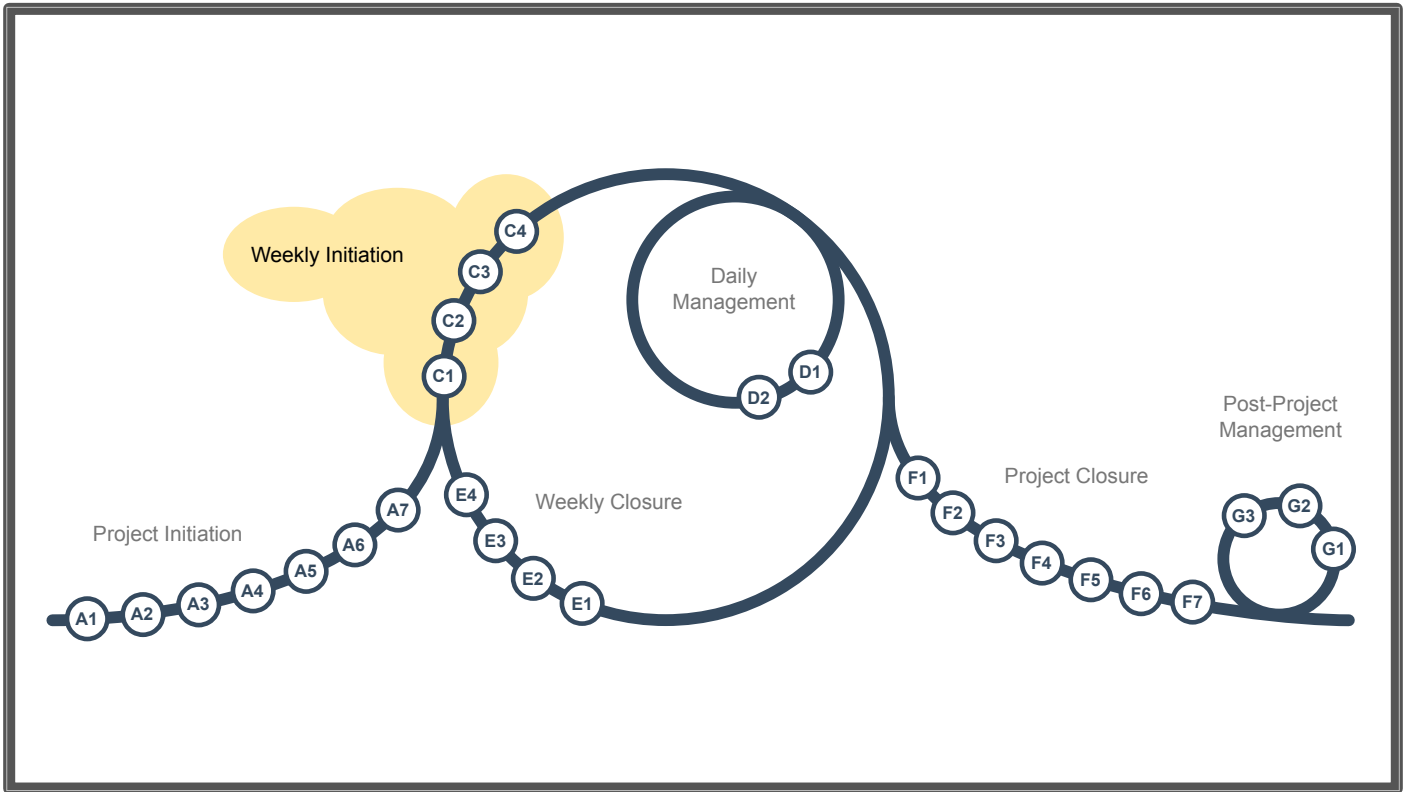
A7 - Conduct a focused communication

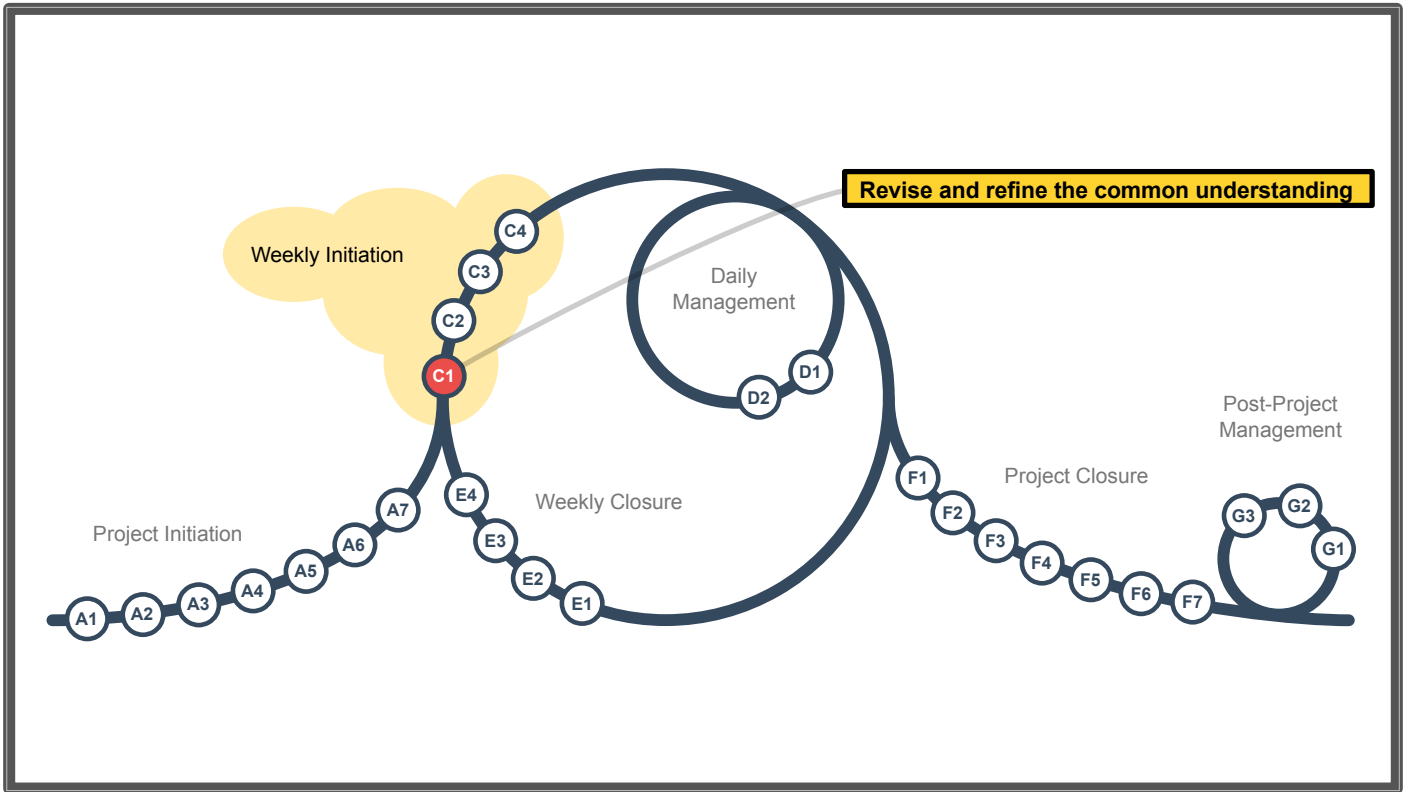


Optionally, ask them to share their stories of when something went horribly wrong, whereas it could be avoided if everyone in the organization knew about the project.

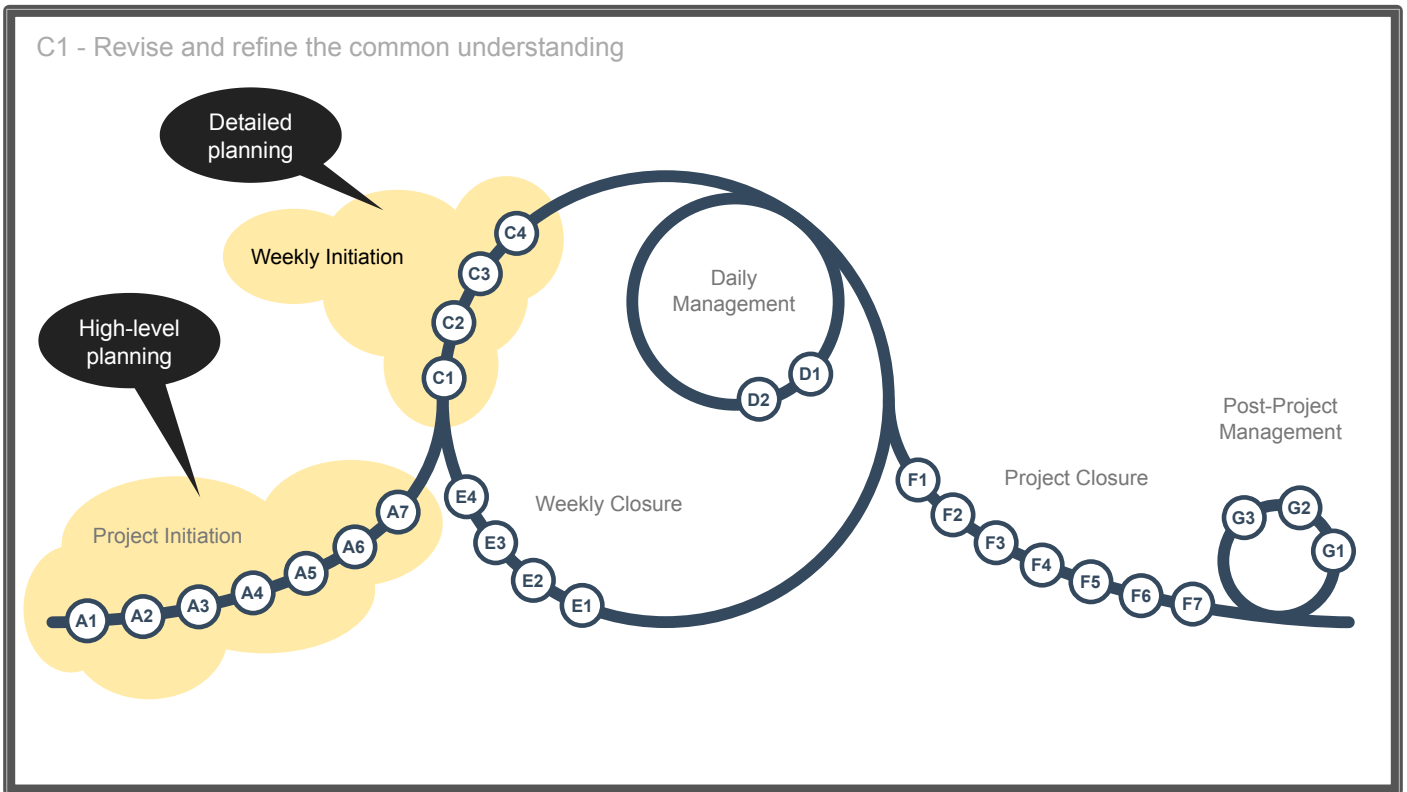








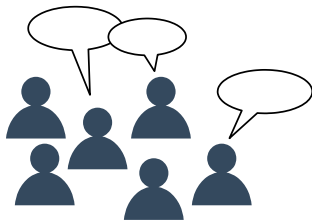
C1 - Revise and refine the common understanding



Again, remind them of the planning concept (first, high-level, and then detailed on a weekly basis). Each time you repeat it, it can be shorter than the previous time.

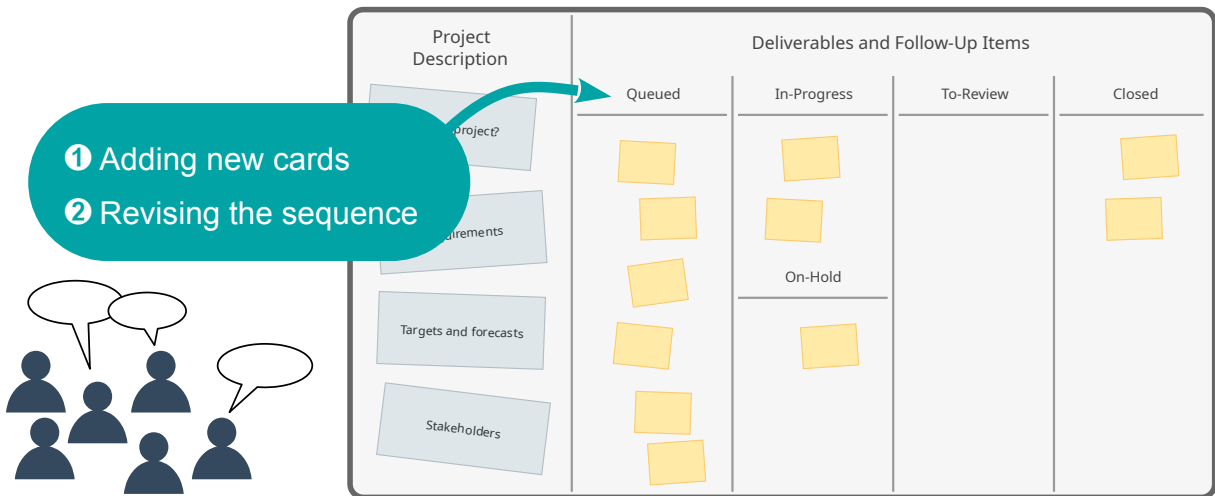


### Integrated Project Board



Project Description	Deliverables and Follow-Up Items			
	Queued	In-Progress	To-Review	Closed
Why this project?	1 sticky note	1 sticky note		1 sticky note
Requirements	1 sticky note	1 sticky note		1 sticky note
Targets and forecasts	1 sticky note	1 sticky note (On-Hold)		
Stakeholders	2 sticky notes			

### Integrated Project Board



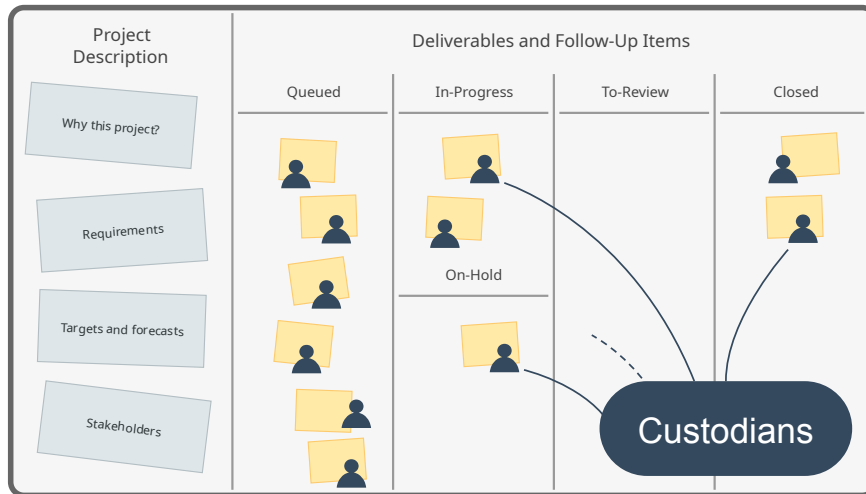
If someone asked: We don't remove any cards from the board. If, for example, a deliverable is not needed anymore, we'll mark it as "canceled" and move it to the "closed" column.

The "adding new cards" covers two scenarios:

1. A new deliverable or follow-up item is needed.
2. You break down a big deliverable into smaller ones. In that case, you'd replace the old one with multiple new cards.

Note: We don't list "tasks" on the board but deliverables and follow-up items. It means that the cards won't be too small. If needed, they can have one or more boards for their small, ongoing tasks. (Mixing tasks on this board would be distracting and, therefore, not a good idea.)

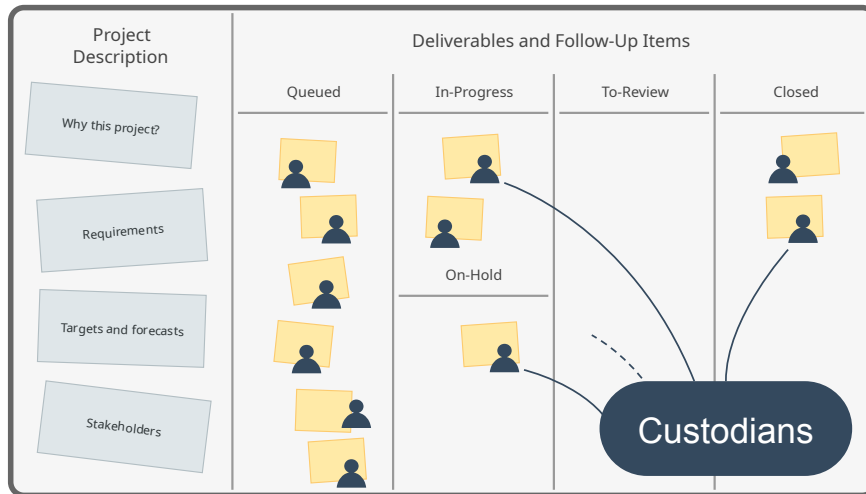
### Integrated Project Board



Both deliverables and follow-up items must have custodians (it's the same in P3.express).

For the “queued” column, if you have too many cards, you don't have to assign custodians to all of them, but you can only assign custodians to those higher on the list.

### Integrated Project Board



- Adding comments
- Updating status
- Following up

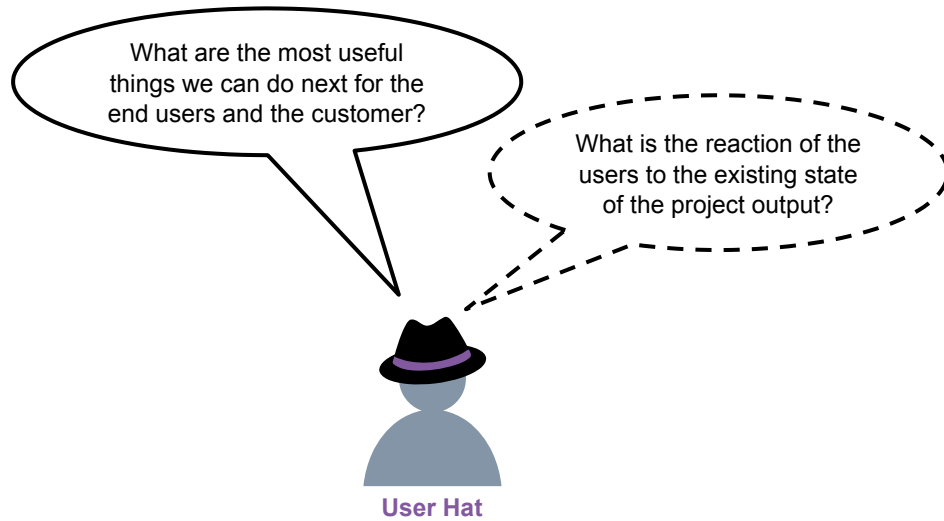
Being a custodian is not necessarily the same as being the one who does the work (also consider that some follow-up items may not require any internal work). When multiple people are responsible for the work of a card, usually one of them is selected as the custodian, but it's not mandatory, and the custodian can be someone other than those who do the work.

All custodians must be project team members.

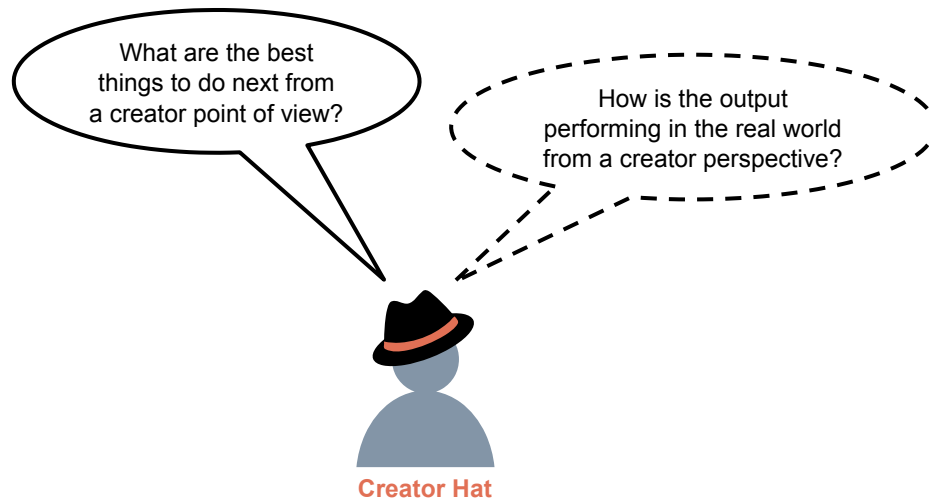
Try to use all team members as custodians rather than only a few of them.

What concerns do you think each hat should have  
in this management activity?



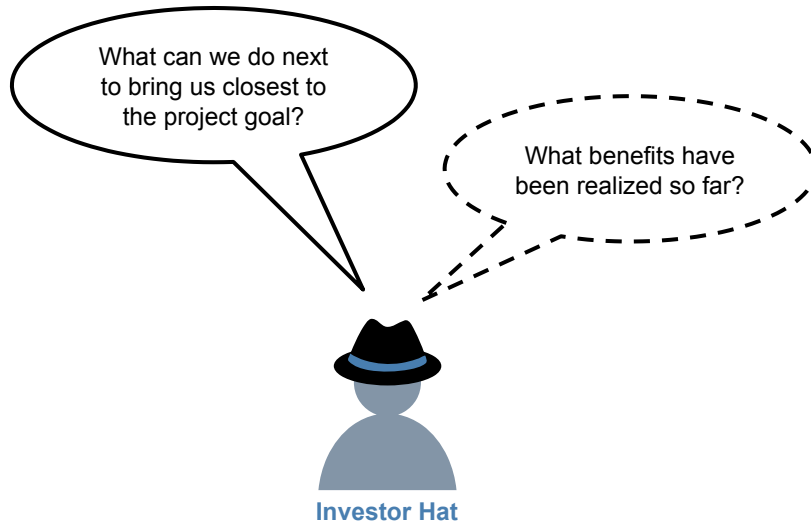


The dashed speed bubble in these slides means that the concern is applicable to some projects (those where their output is put into production in the middle of the project).



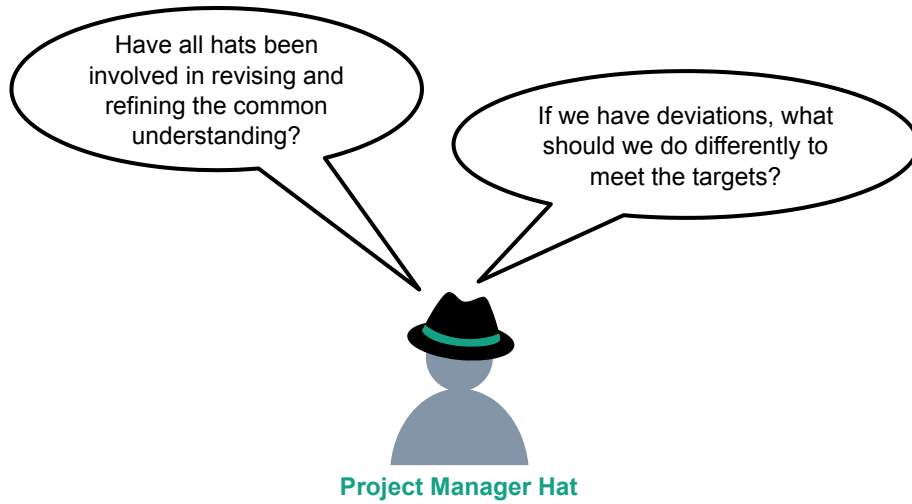
“From a creator point of view” can be translated into “from a technical point of view” in most projects, but remember that “technical” may not be suitable for some projects (e.g., artistic ones).

C1 - Revise and refine the common understanding





C1 - Revise and refine the common understanding

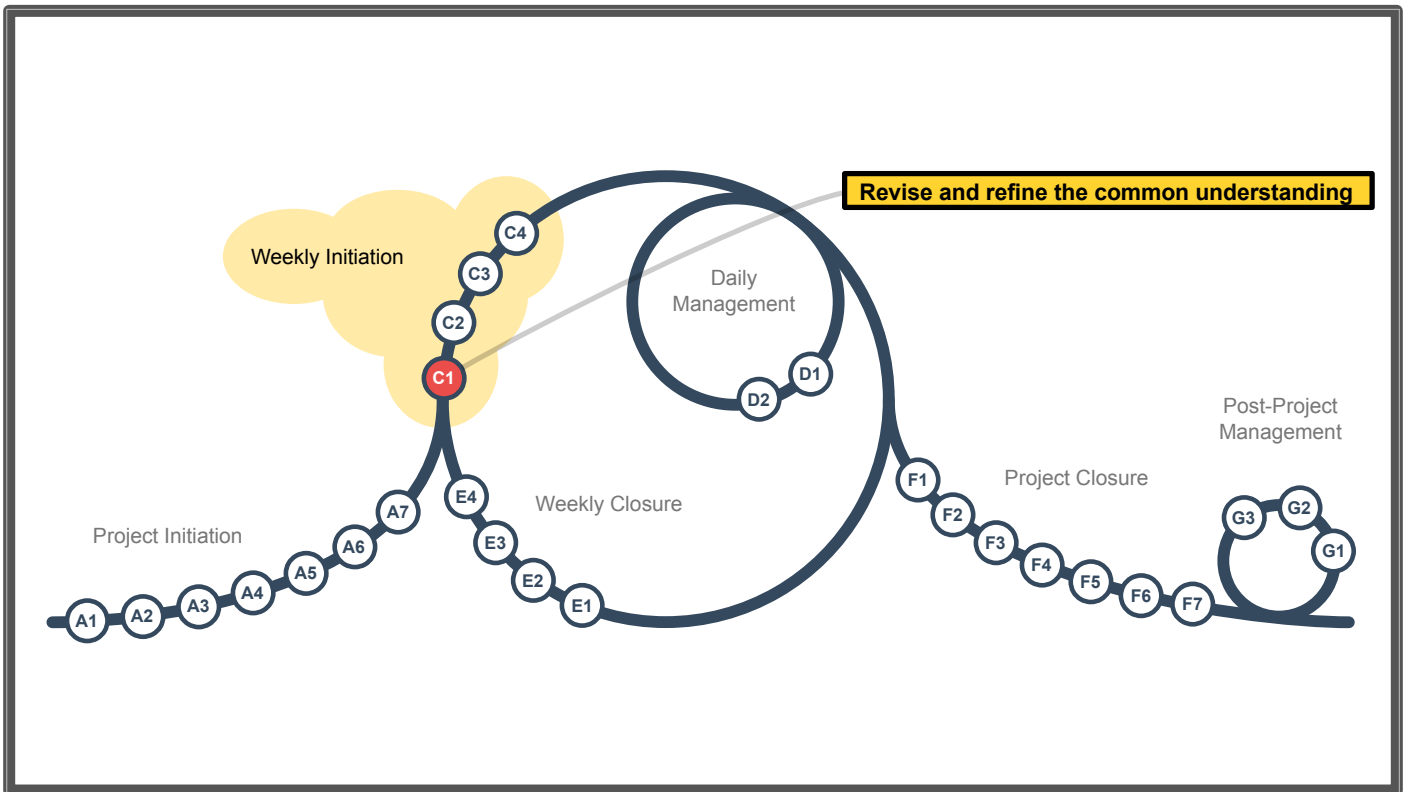


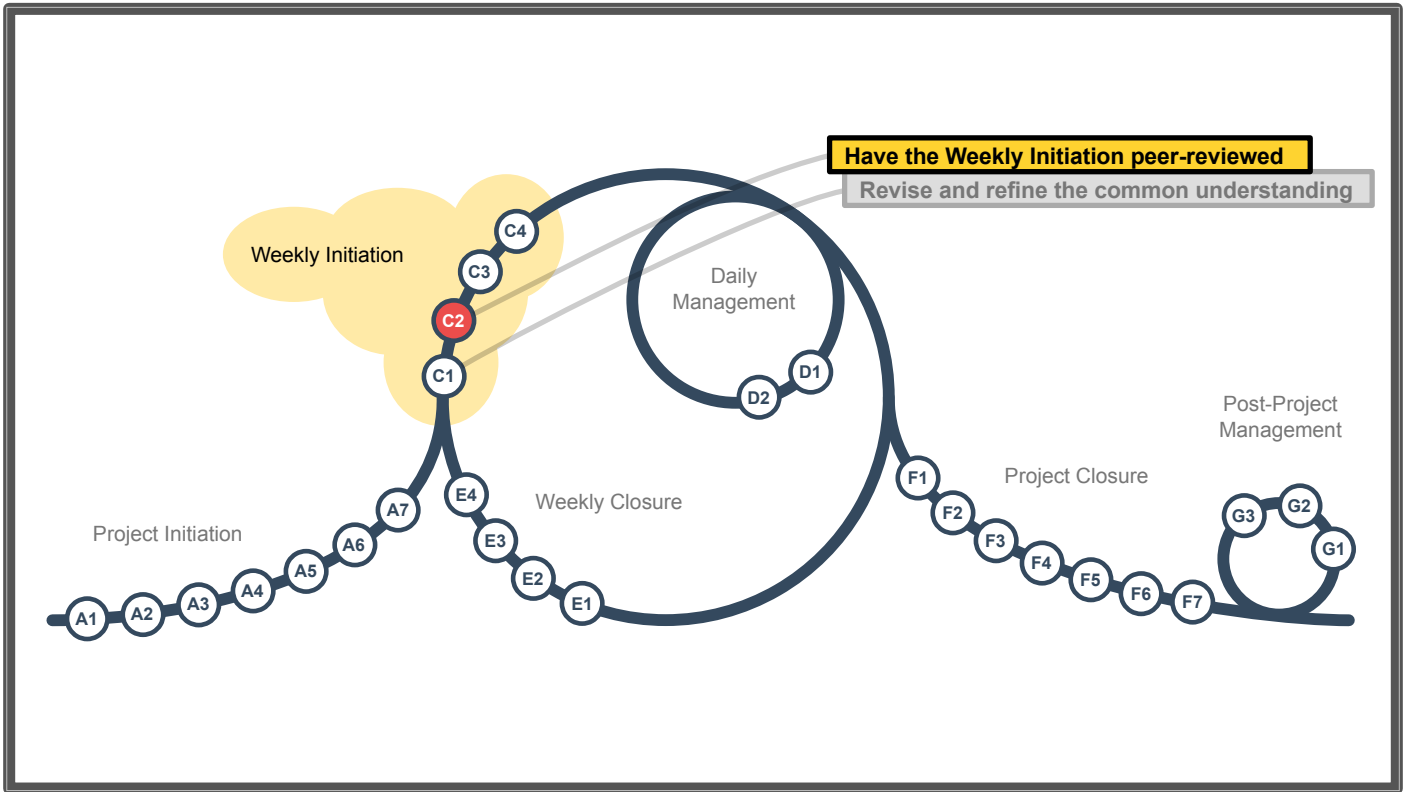
C1 - Revise and refine the common understanding

Are the documents  
clear and easy to  
understand?

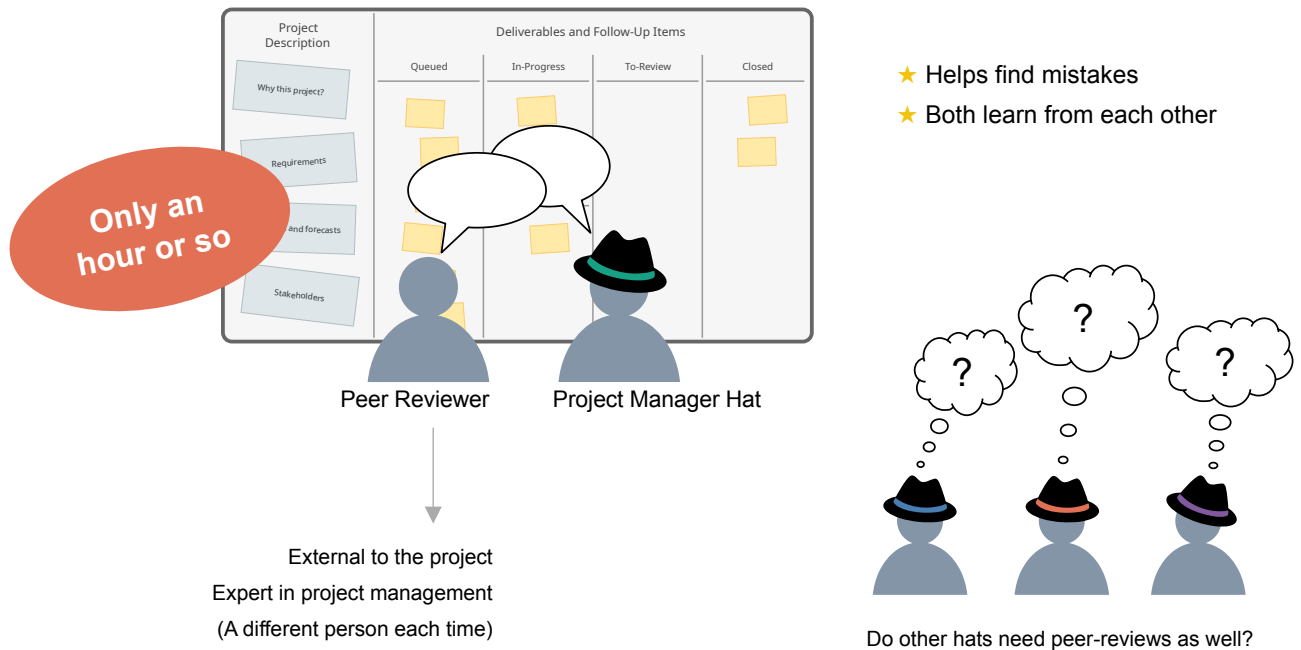


Project Manager Hat

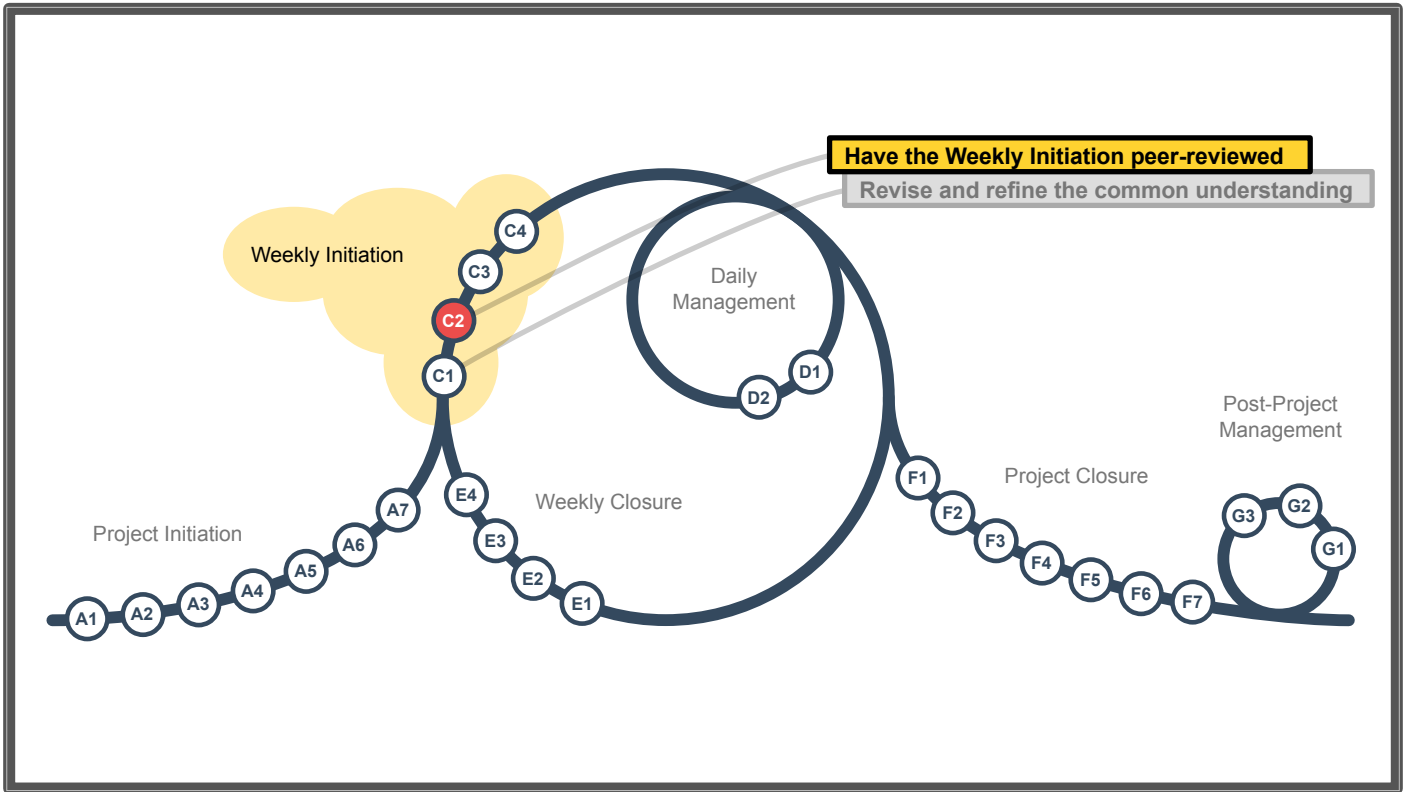


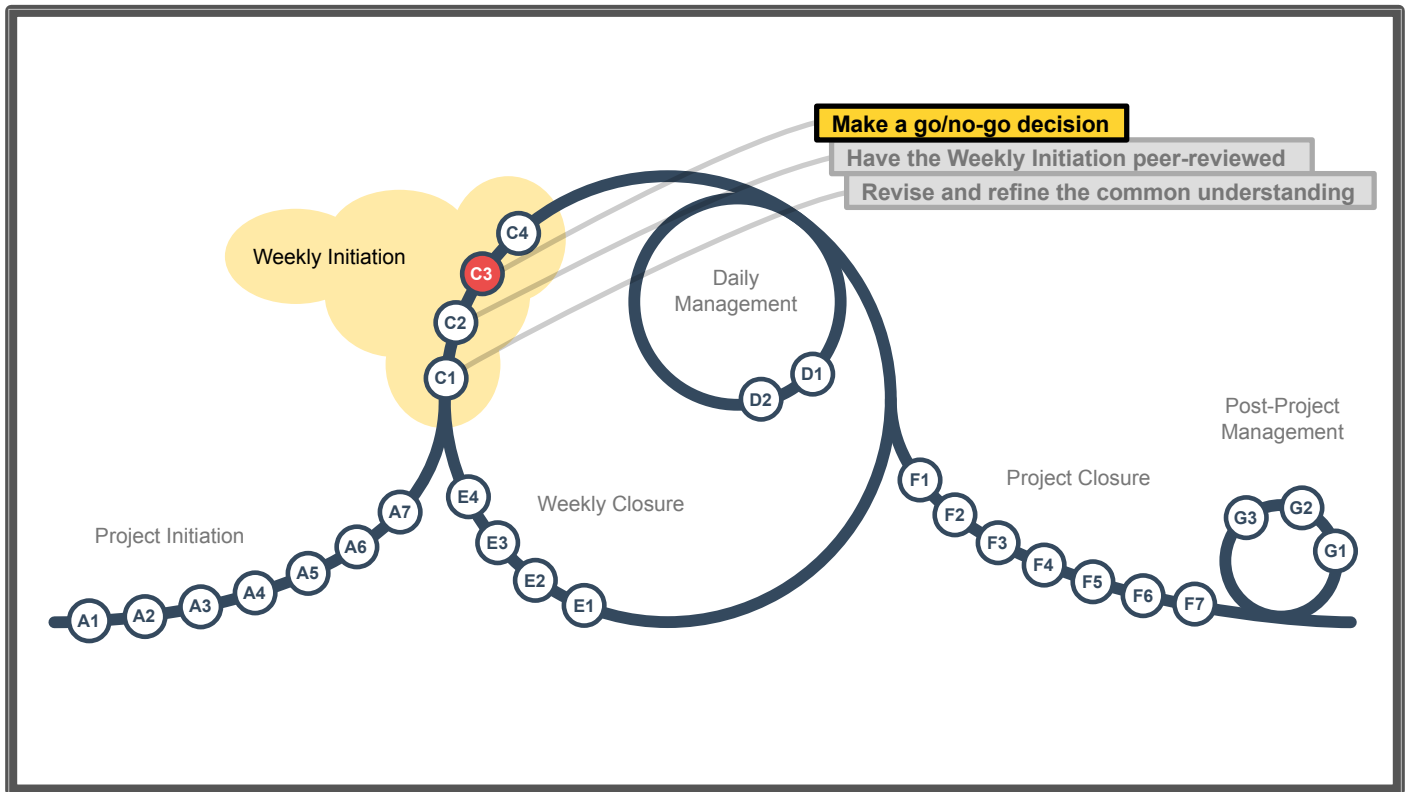


## C2 - Have the Weekly Initiation peer-reviewed



Remind them that it's a weekly activity, so their peer review must be very simple and short.





What concerns do you think each hat should have in this management activity?





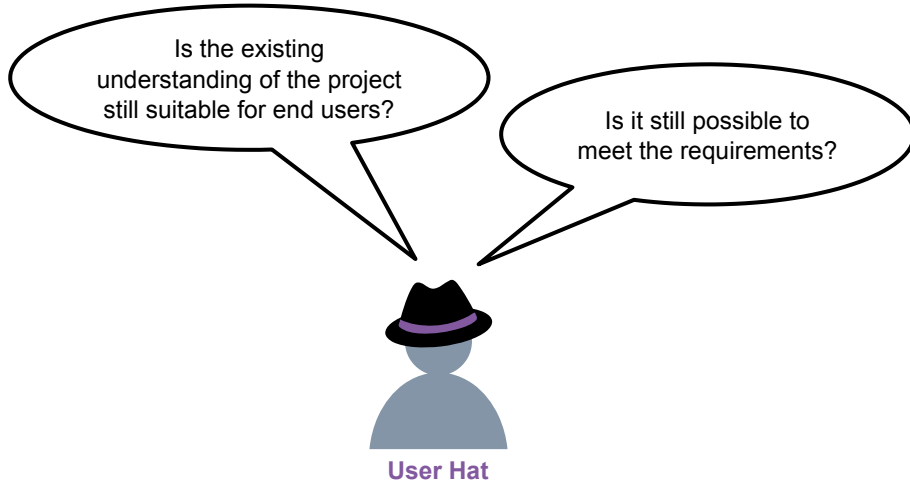
C3 - Make a go/no-go decision



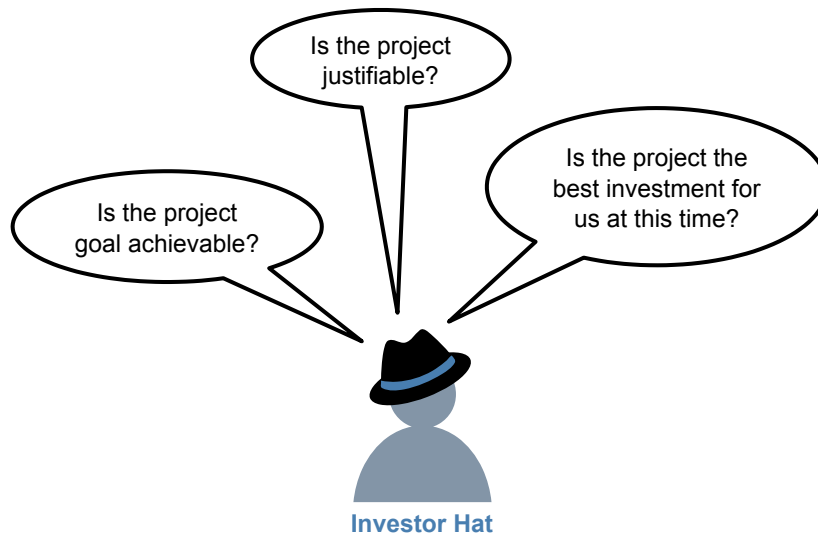
**Creator Hat**

Are the targets and expectations realistic and achievable?

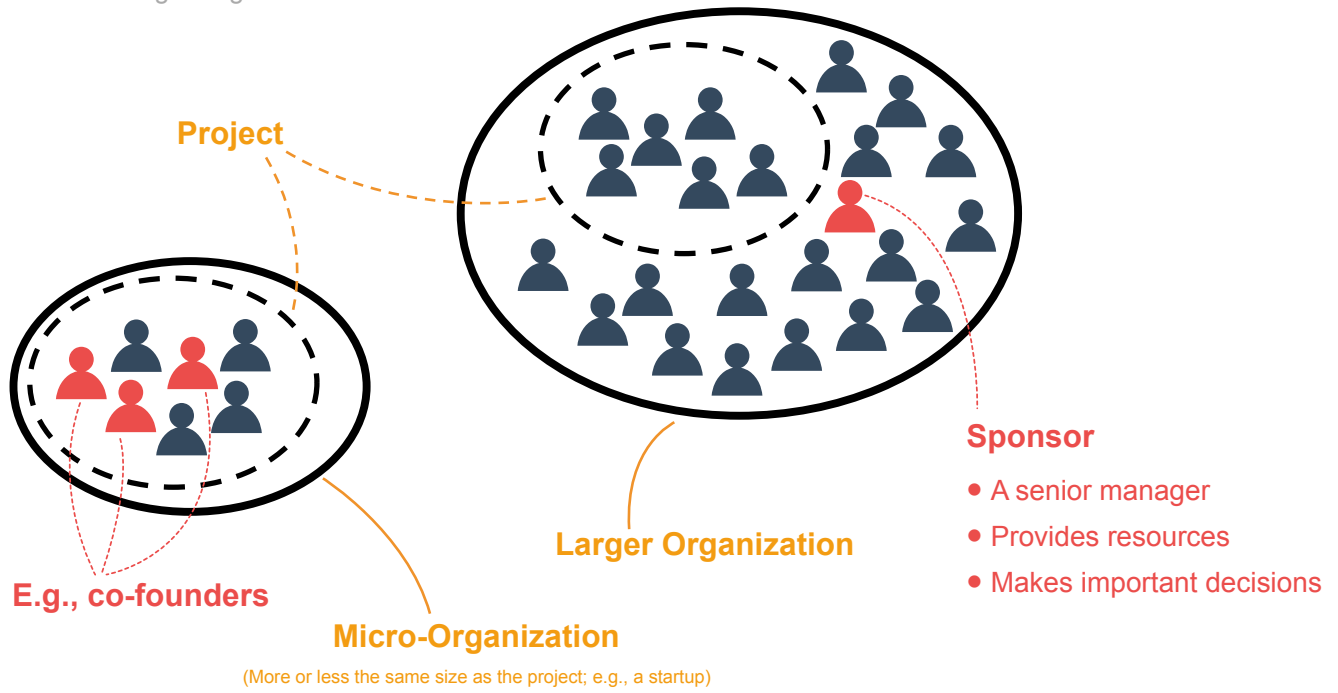
C3 - Make a go/no-go decision



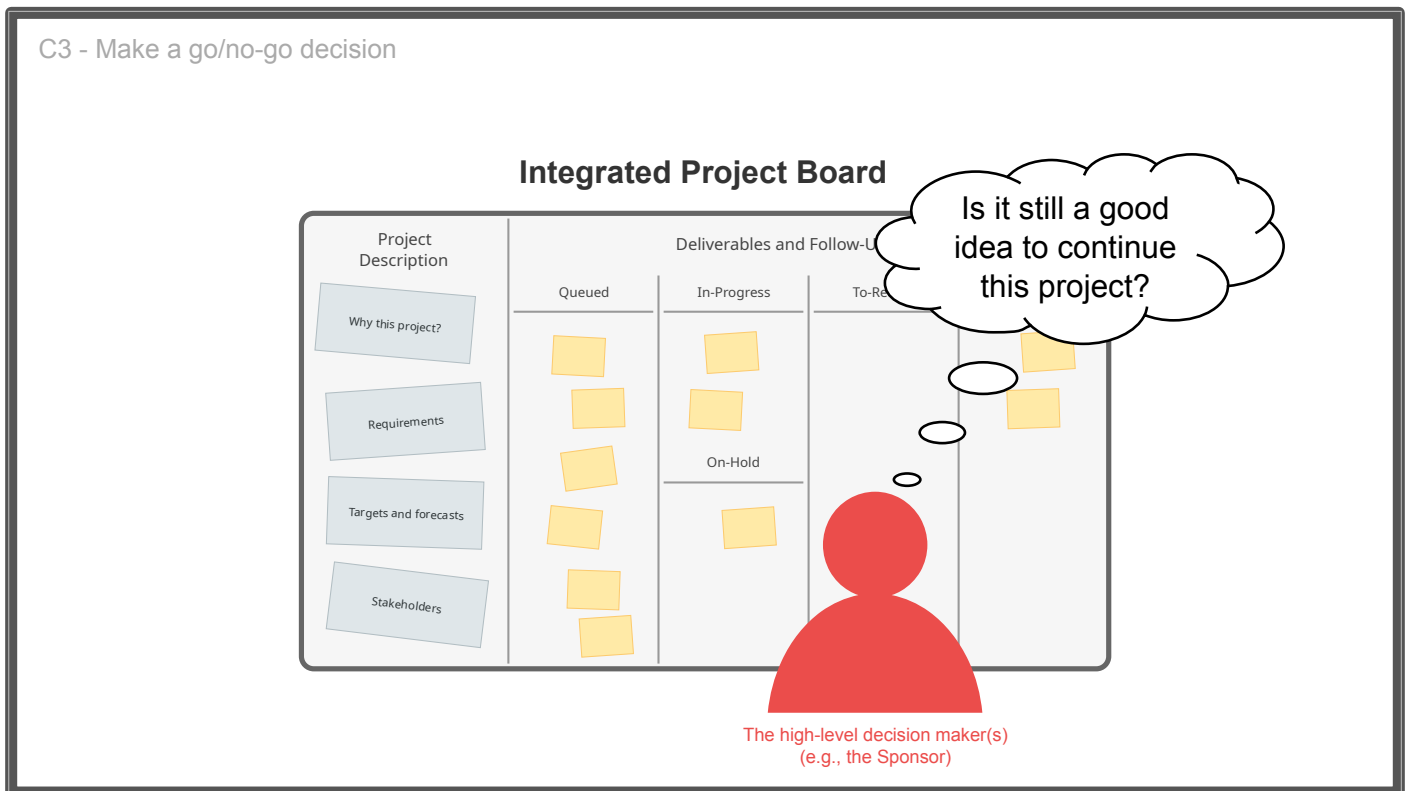
C3 - Make a go/no-go decision



C3 - Make a go/no-go decision



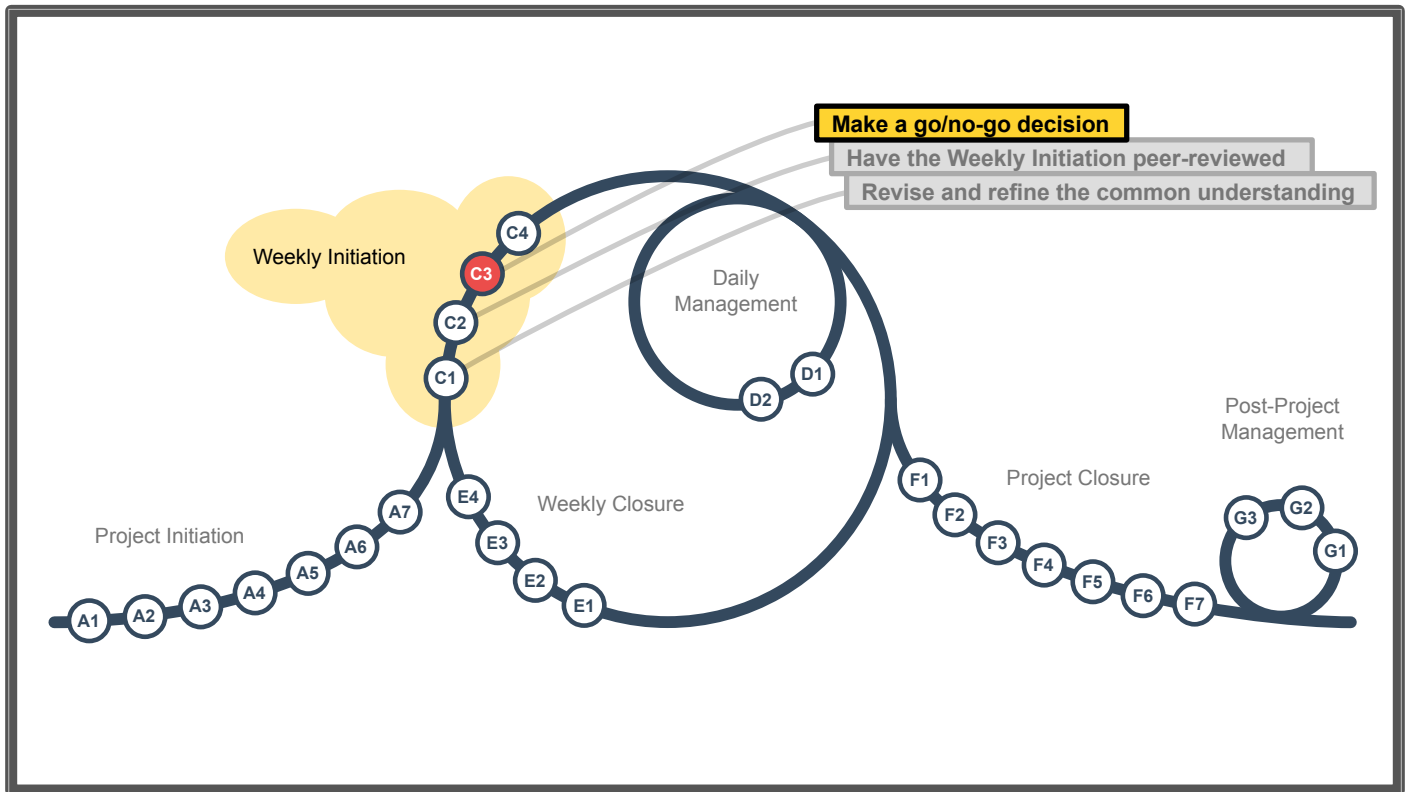
Just a reminder of who the high-level decision-makers are.

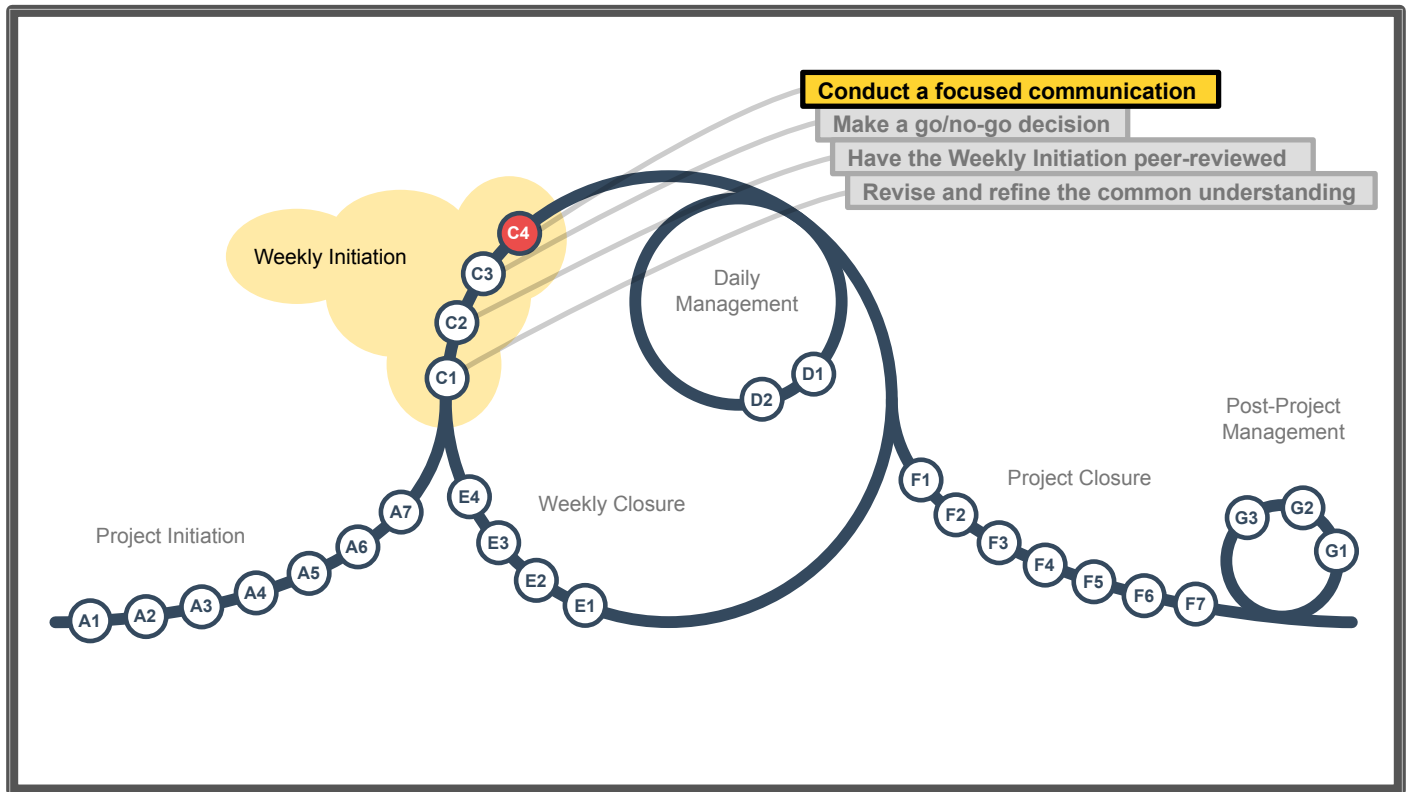


In case there's a question about it:

In normal-size projects, sponsors are high-level managers (usually executives). Can we expect an executive to be involved in weekly decision-making like this?

If the project is sensitive, then the executive may want to do so, and being a micro-project doesn't mean it can't be sensitive. On the other hand, if it's too much work for the executive, someone else can be the sponsor who can take this weekly activity. Then, if needed, that person can contact one of the executives once a month or so for double-checking. Again, what happens between the sponsor and the rest of the decision-makers is up to them, and the team shouldn't have to worry about it.



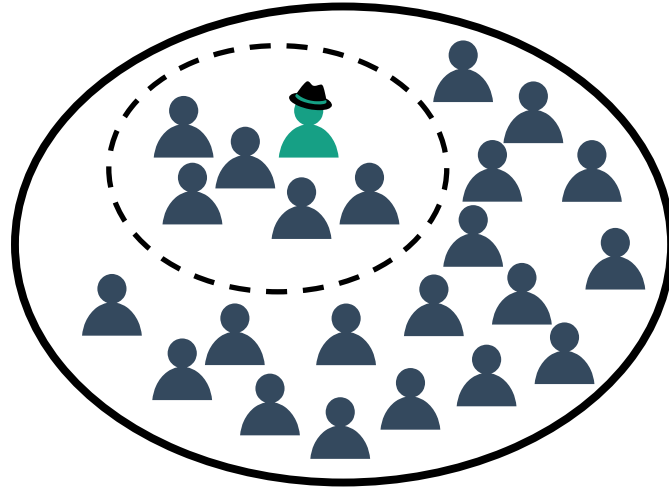


What are the advantages of telling the status of the project to everyone in the organization?

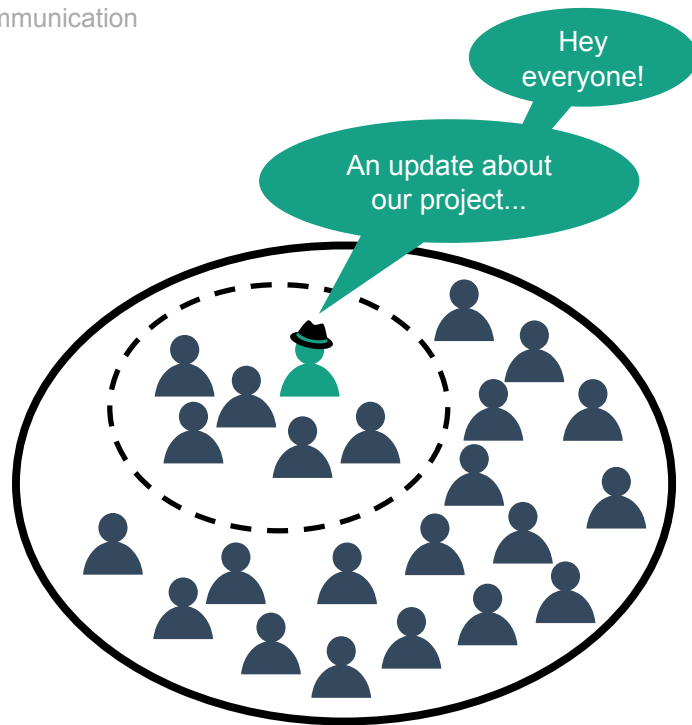




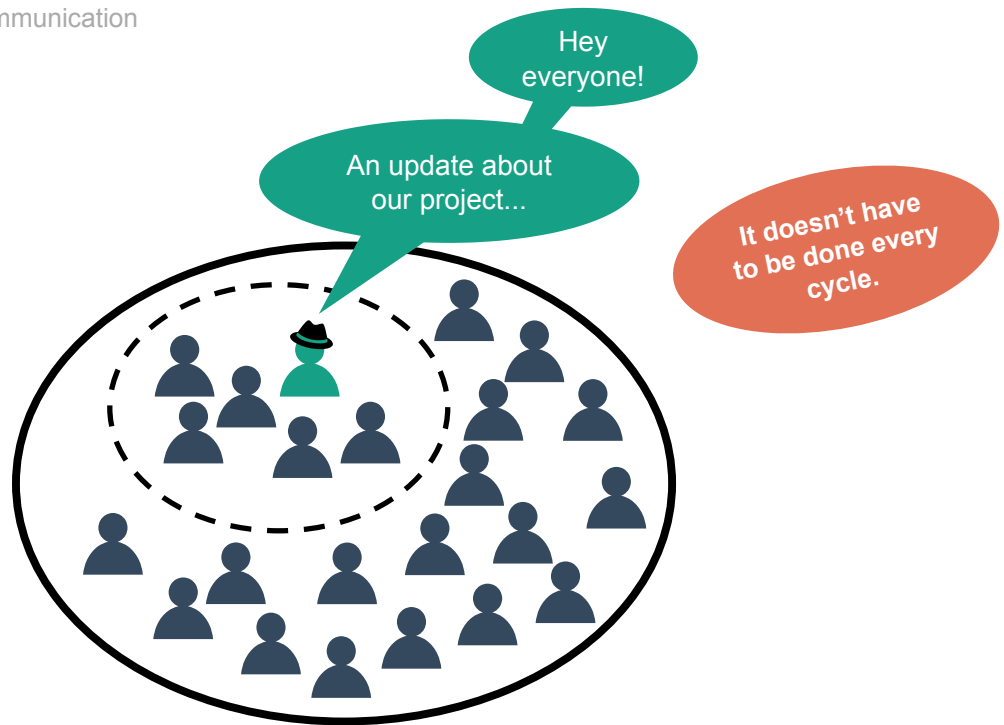
C4 - Conduct a focused communication



C4 - Conduct a focused communication

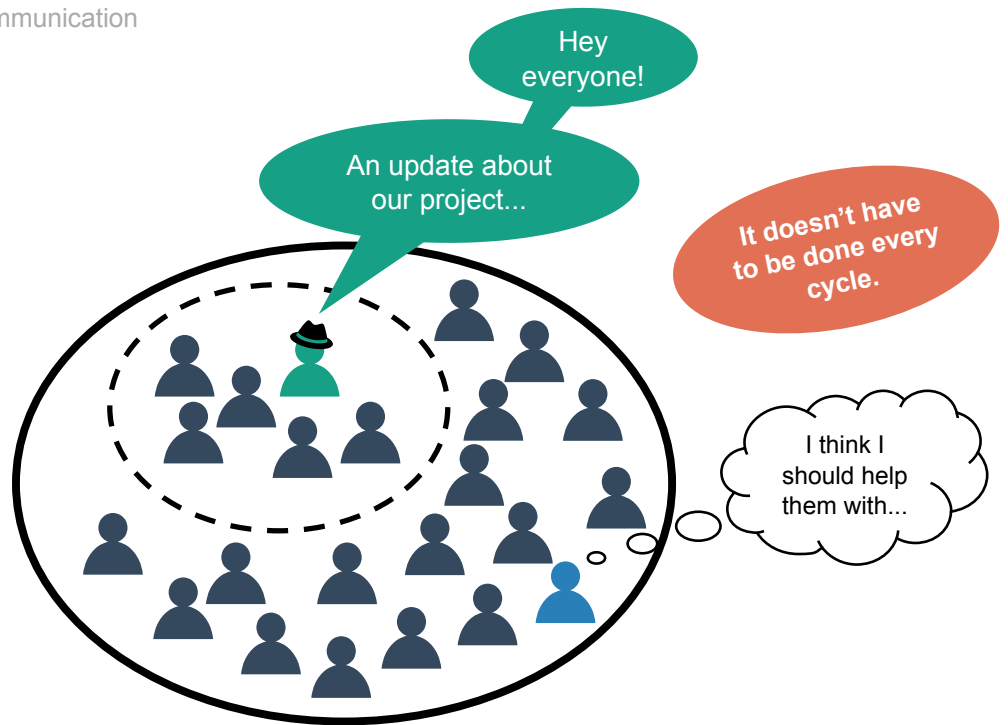


C4 - Conduct a focused communication

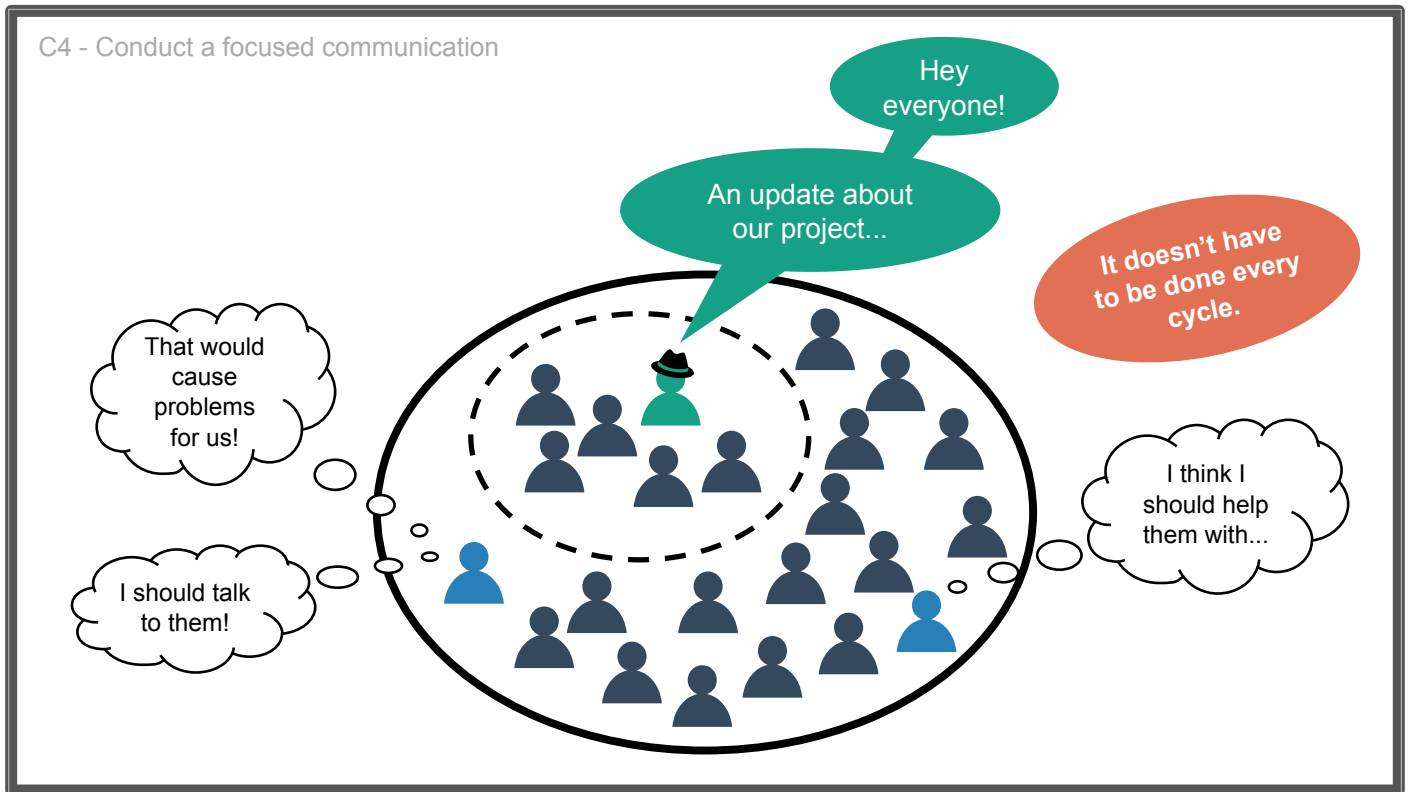


For example, you may want to send weekly messages to a few people in the organization and do it once a month for the rest.

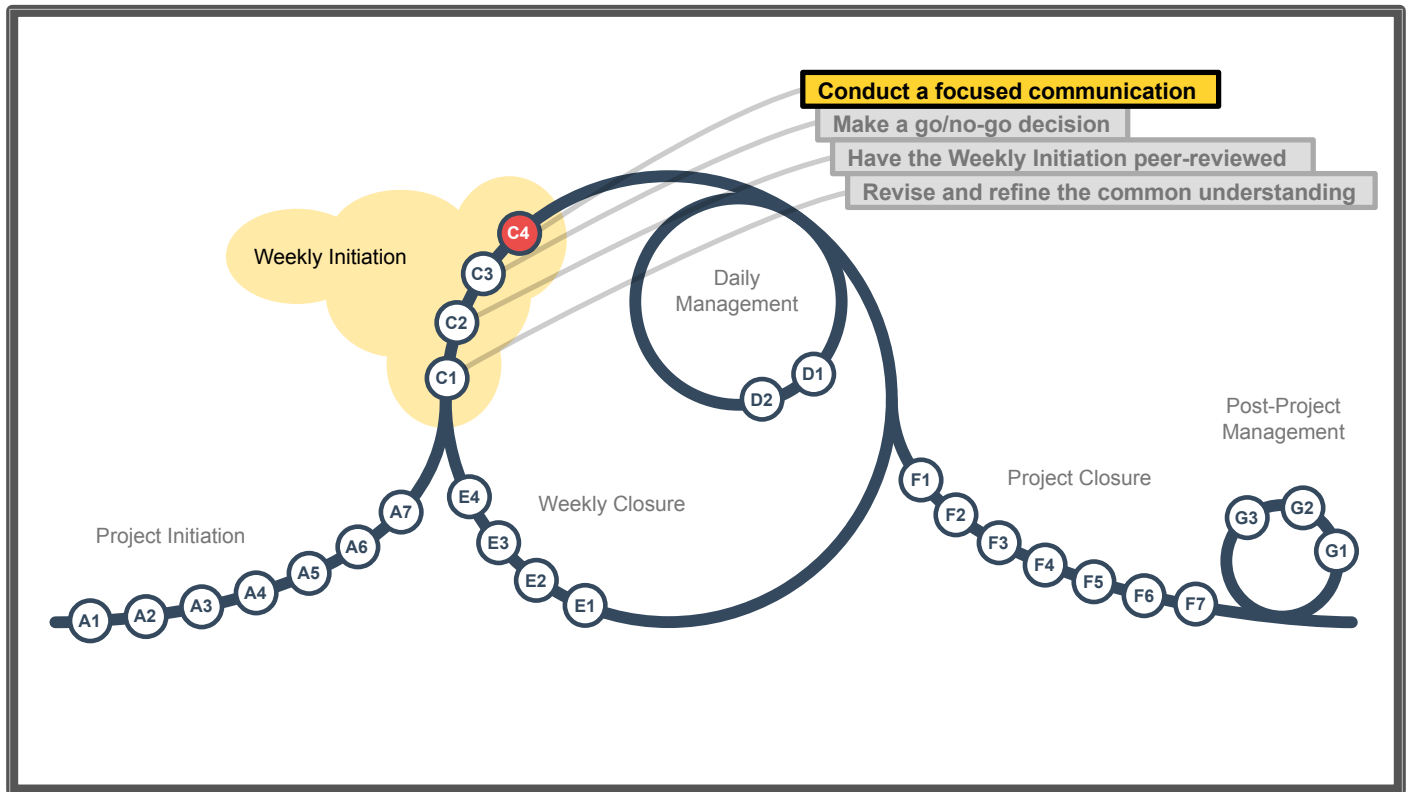
C4 - Conduct a focused communication

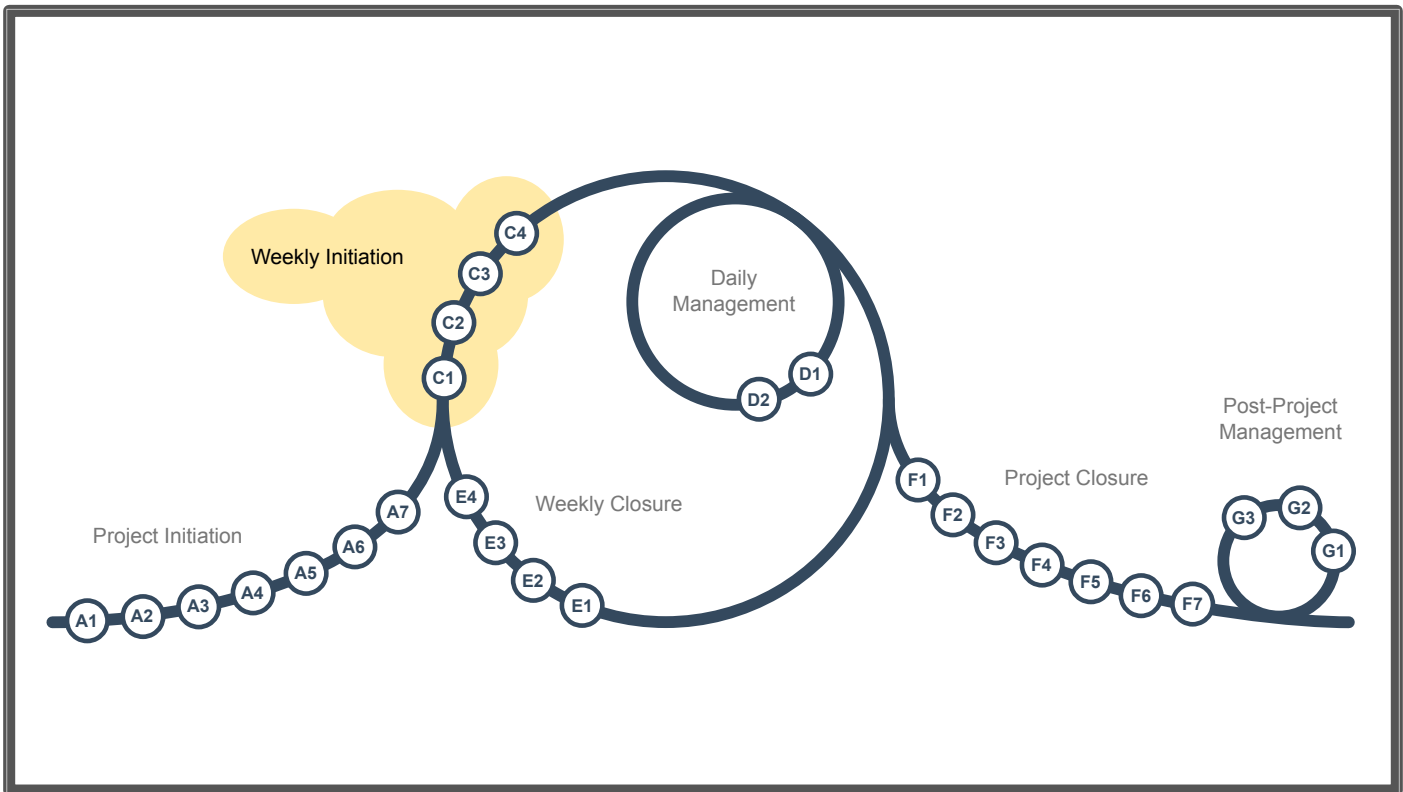


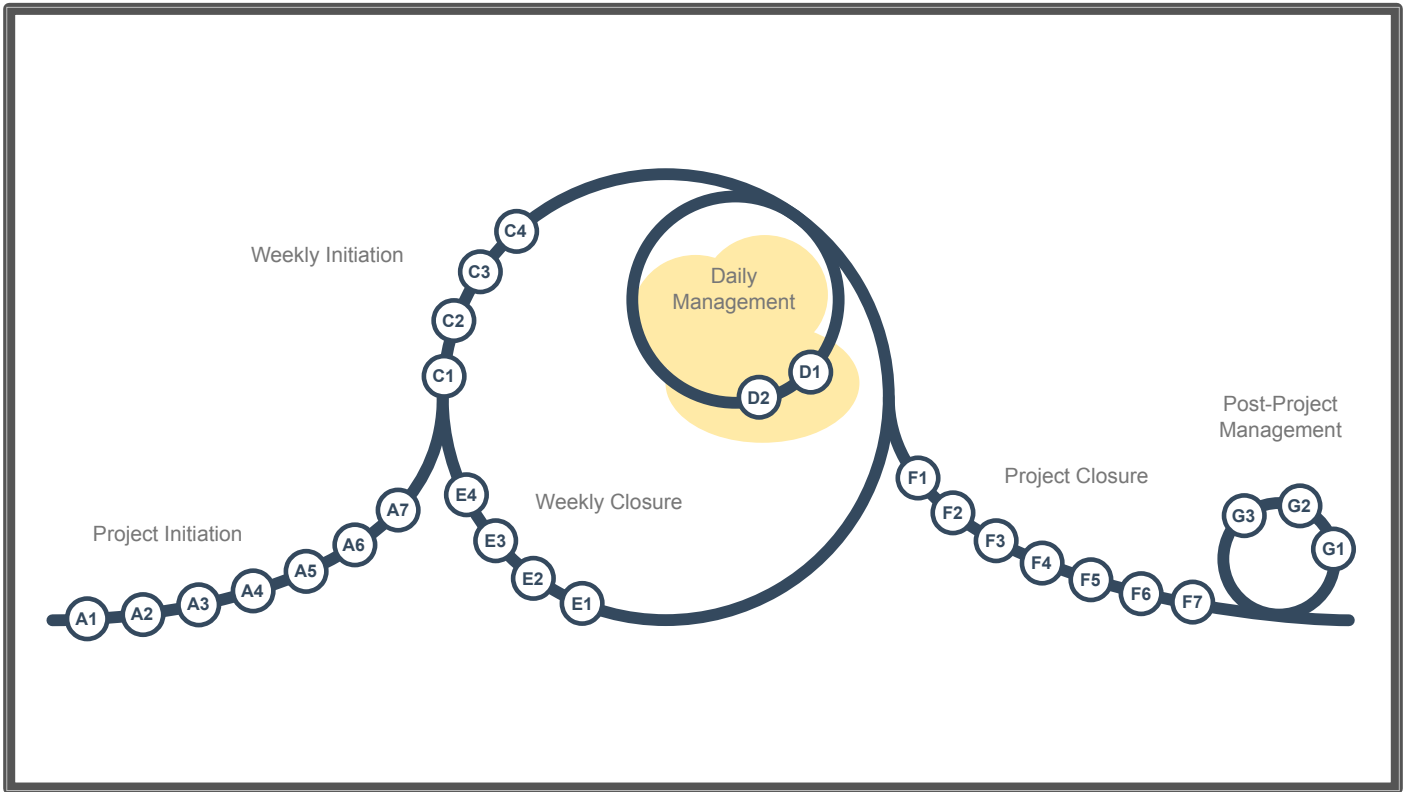
C4 - Conduct a focused communication



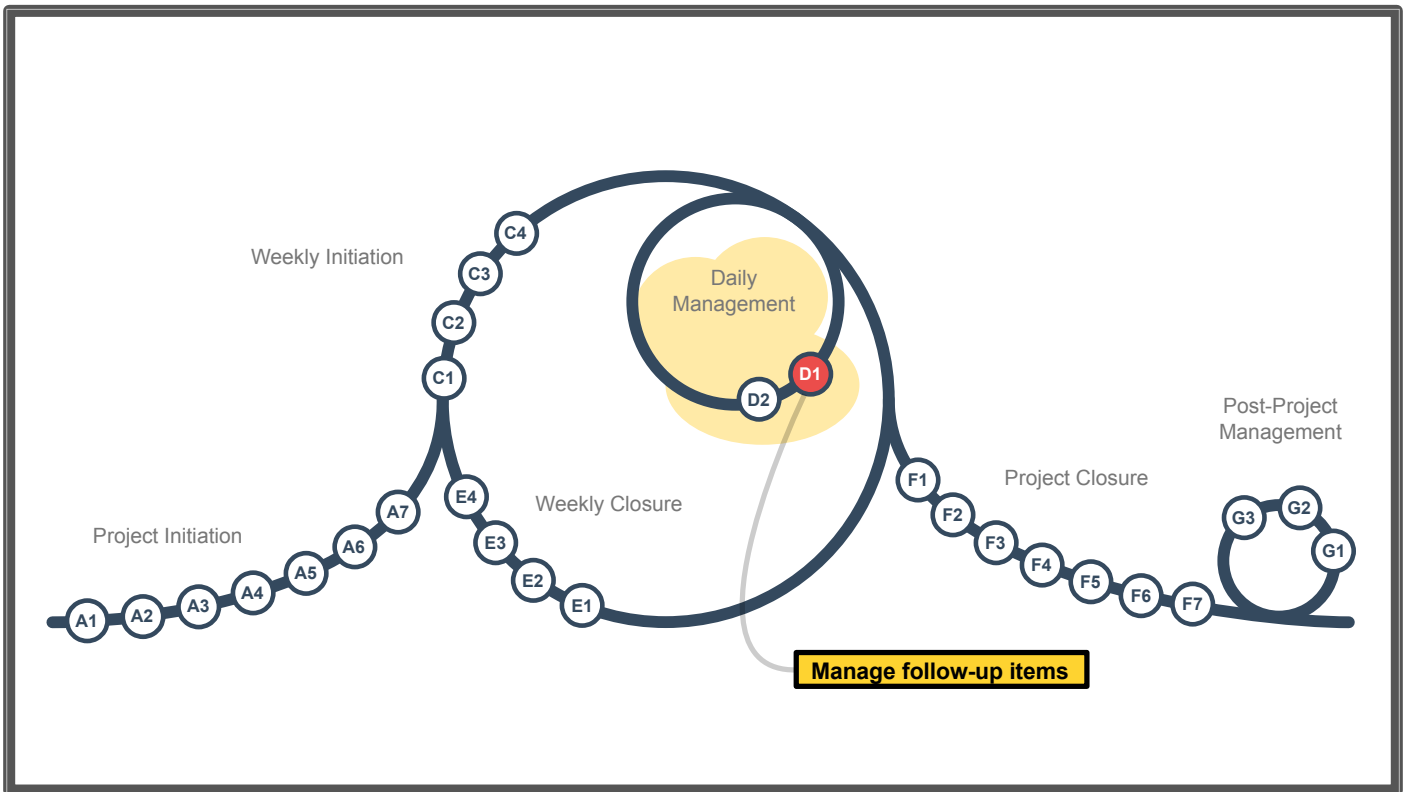
Ask them to share related stories if you want.



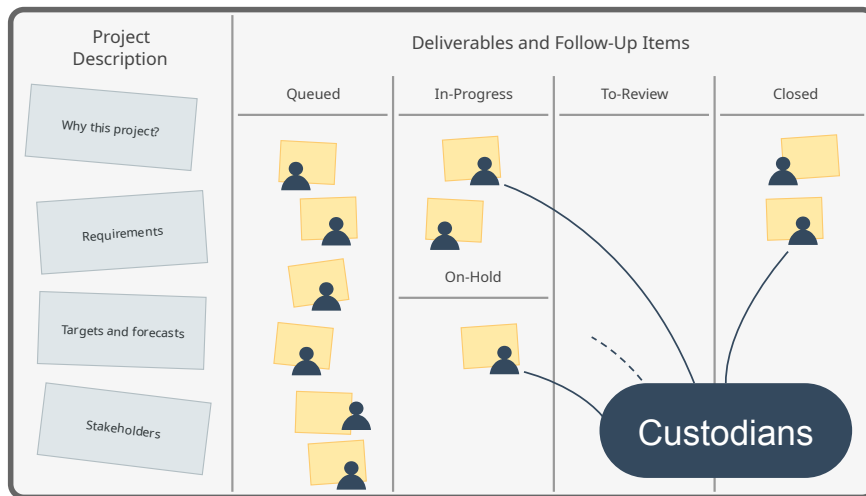




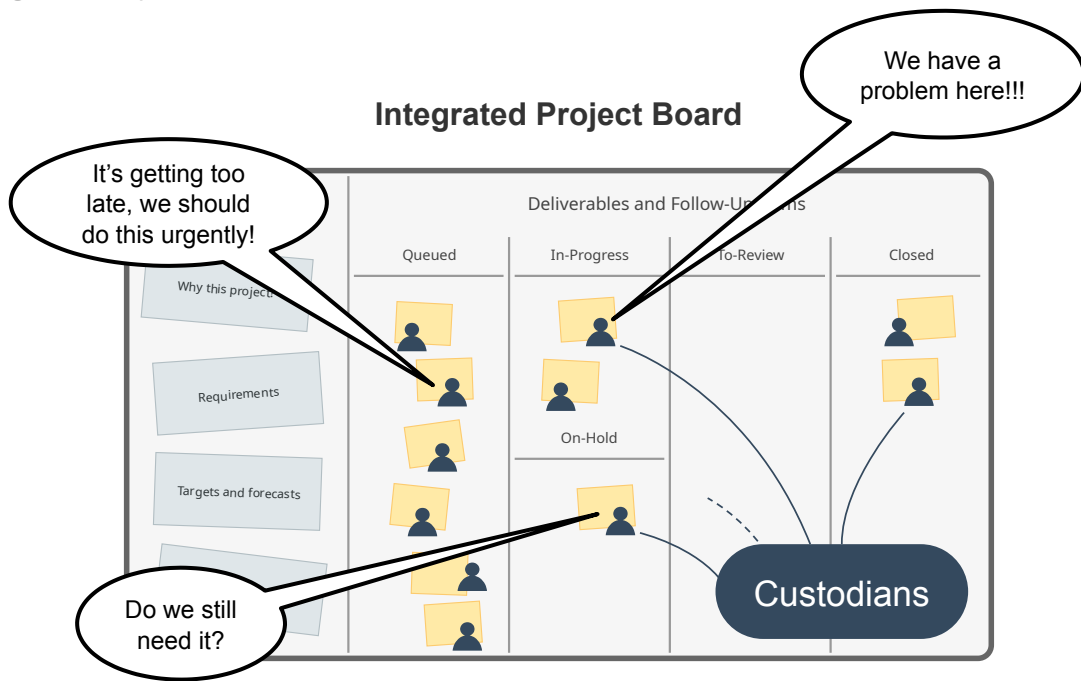




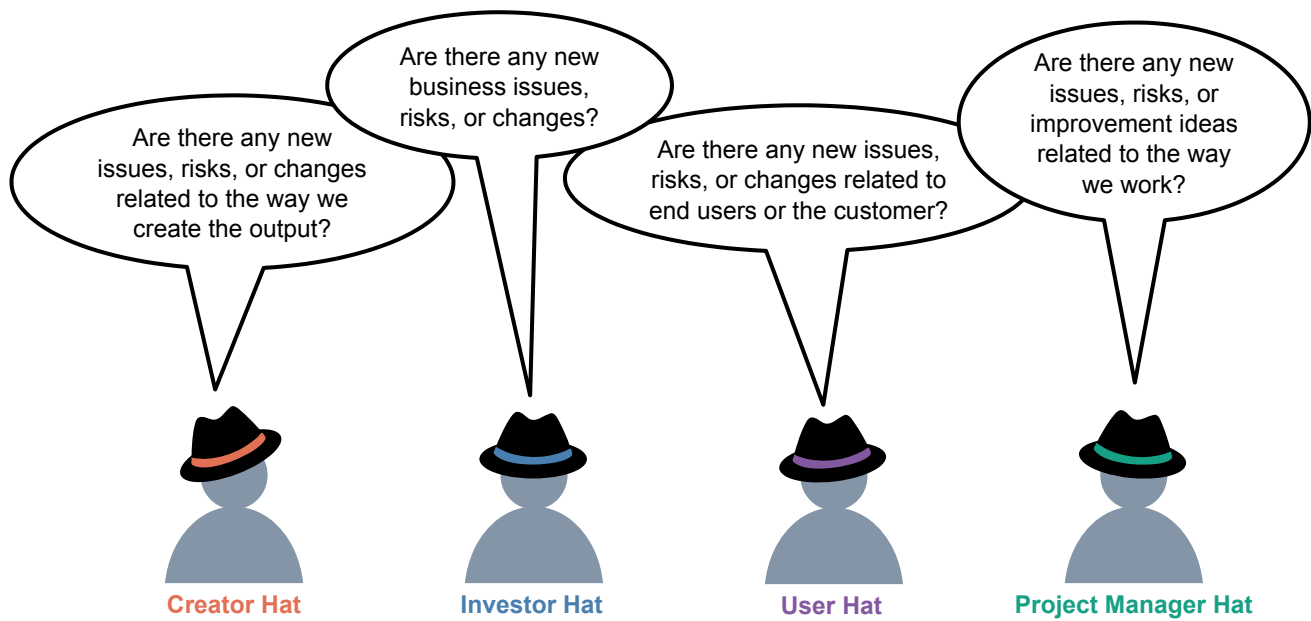
### Integrated Project Board



### Integrated Project Board



D1 – Manage follow-up items



So, based on these, we create new cards and add them to the board.



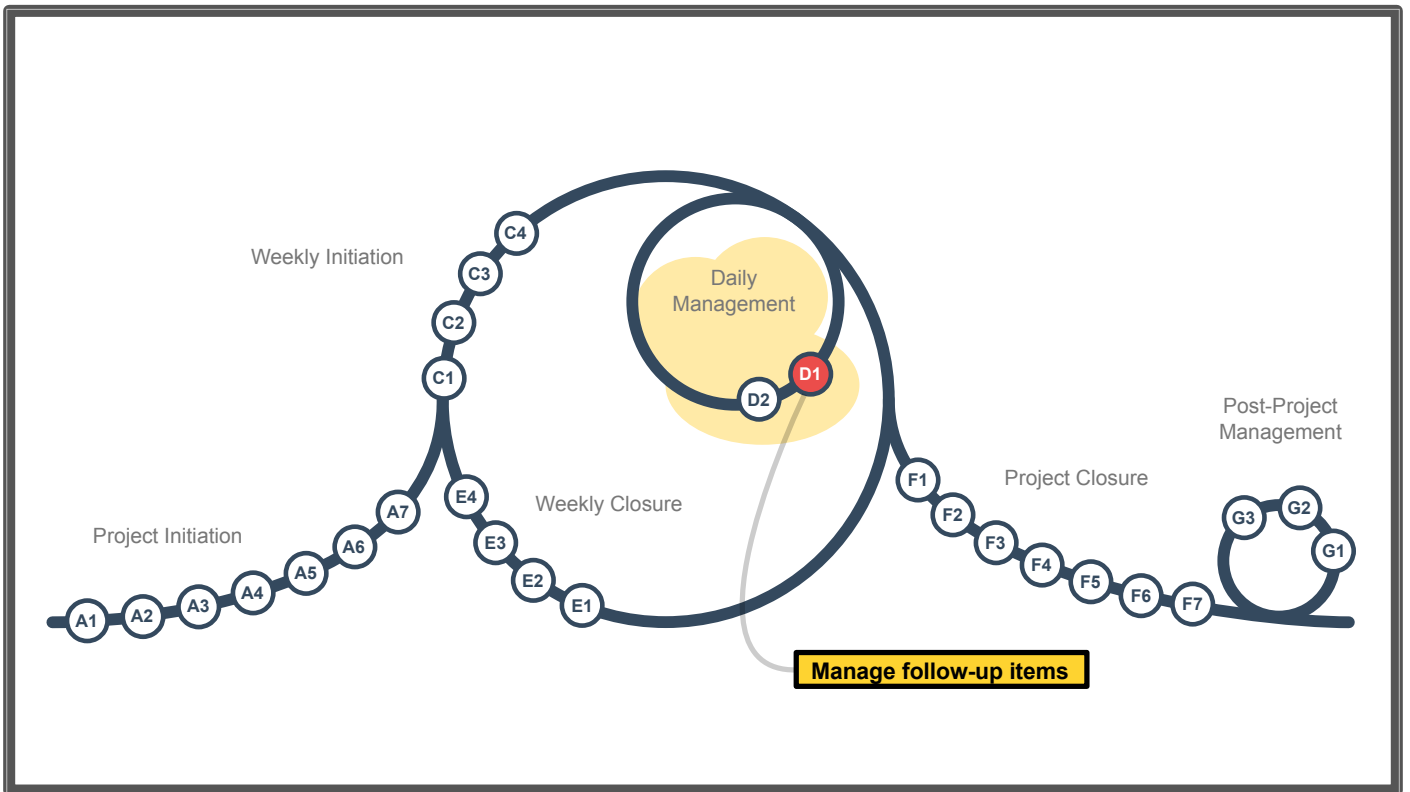
**Project Manager Hat**

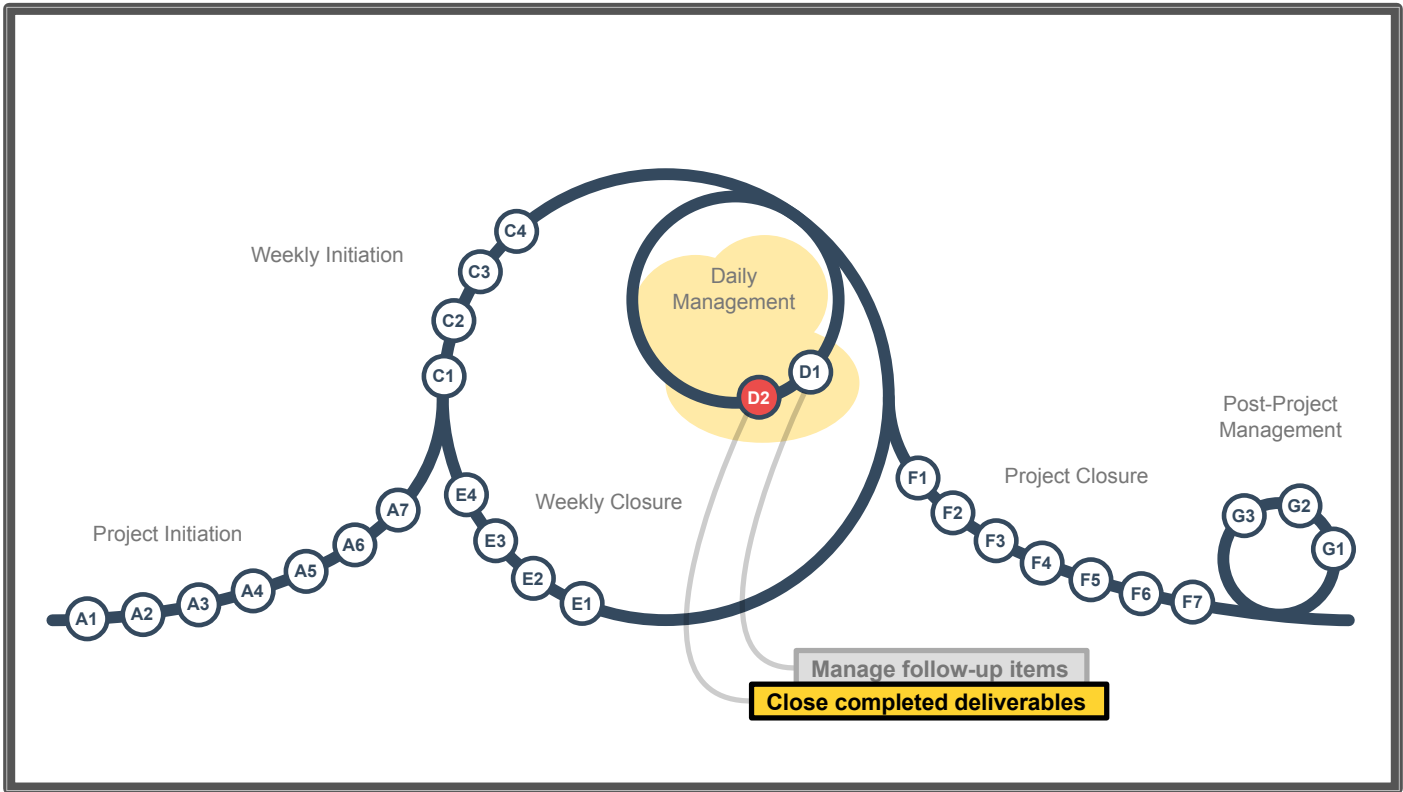
D1 – Manage follow-up items

Are the documents  
clear and easy to  
understand?



Project Manager Hat

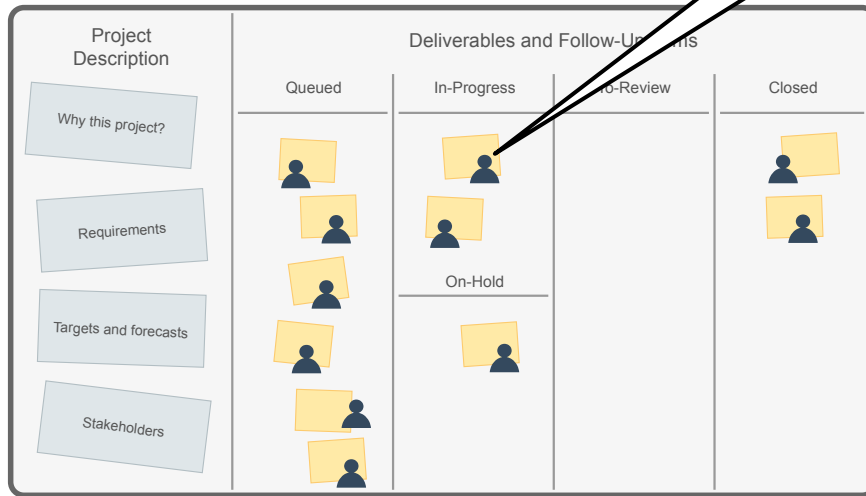






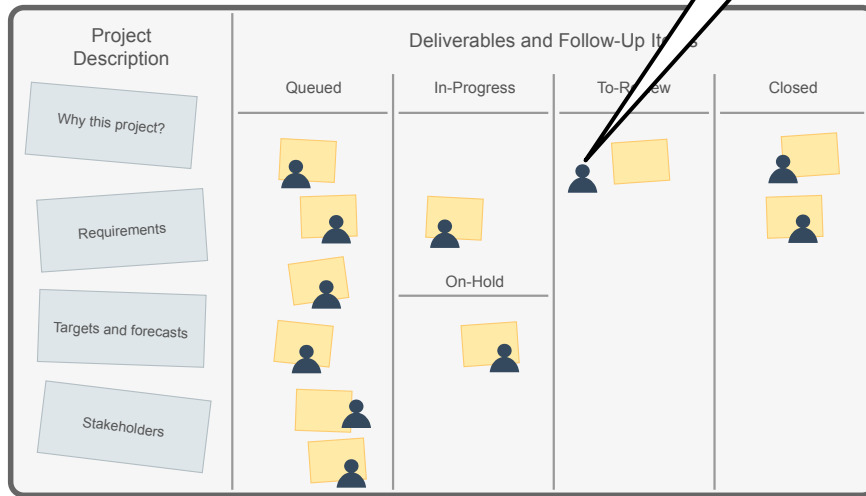
### Integrated Project Board

DONE!!!



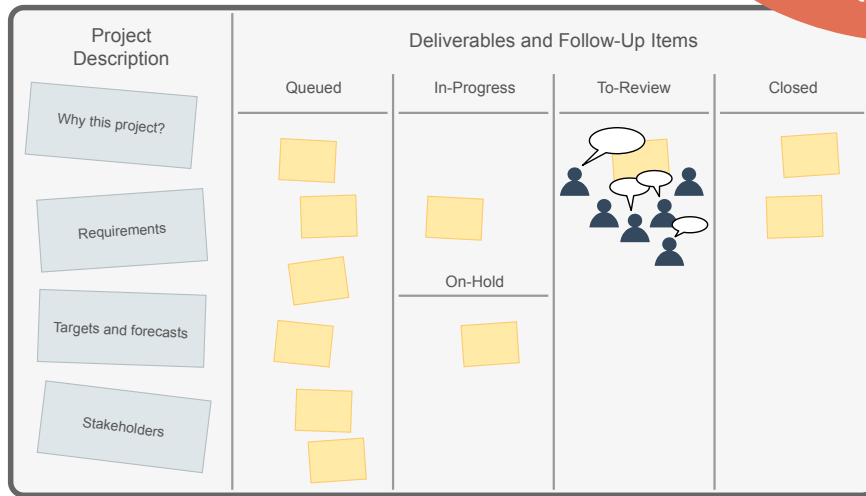
### Integrated Project Board

It's ready to be reviewed



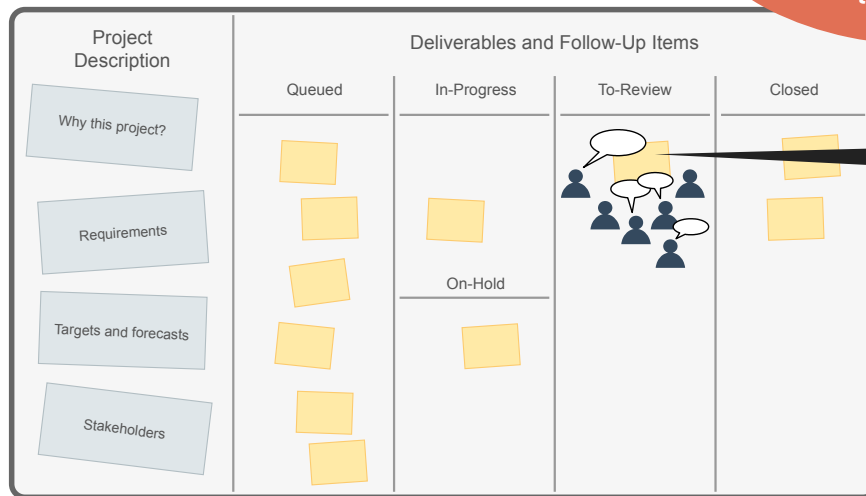
### Integrated Project Board

*The whole team or a subset of it reviews the card*



So, the custodian moves the card to the “to-review” column, but they may not move it to the “closed” column. For that, the whole or a subset of the team should review the item first.

### Integrated Project Board



If you want, give them a deliverable as an example, and ask them what they would consider as the acceptance criteria.

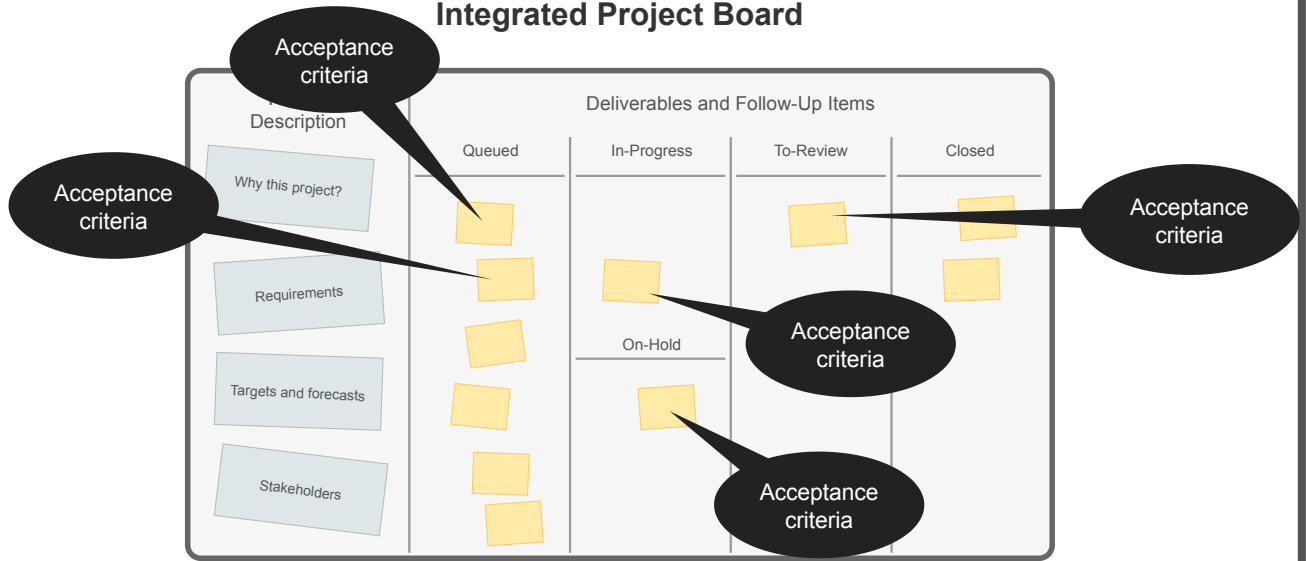
For example:

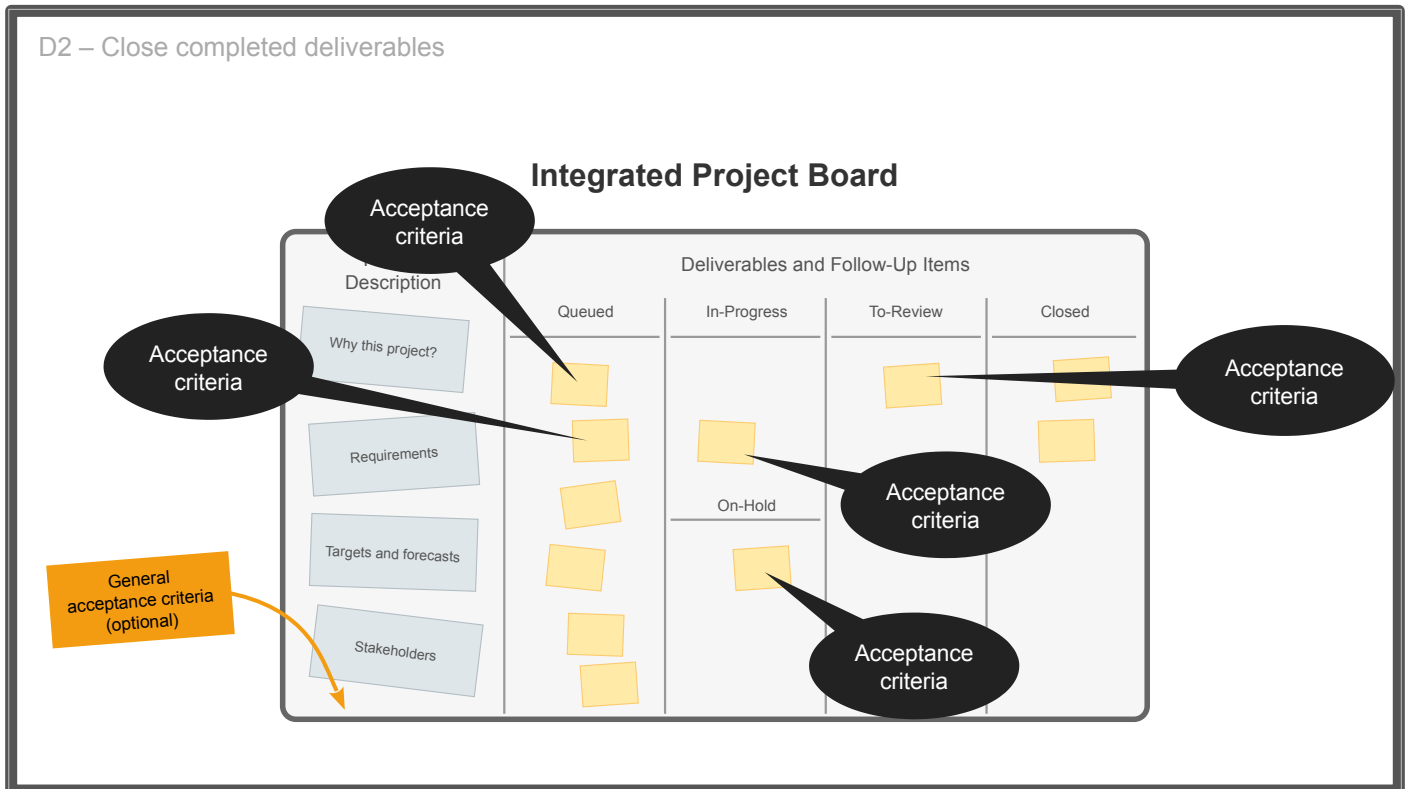
Deliverable: The paint in the living room

Acceptance criteria:

- When moving a source of light close to the wall, there shouldn't be any visible bumps.
- When looking at the wall, the paint should seem uniform, without any visible brush strokes or areas with different colors.
- The wire accessories and other elements on the wall should be removed before painting and have no traces of paint.

### Integrated Project Board





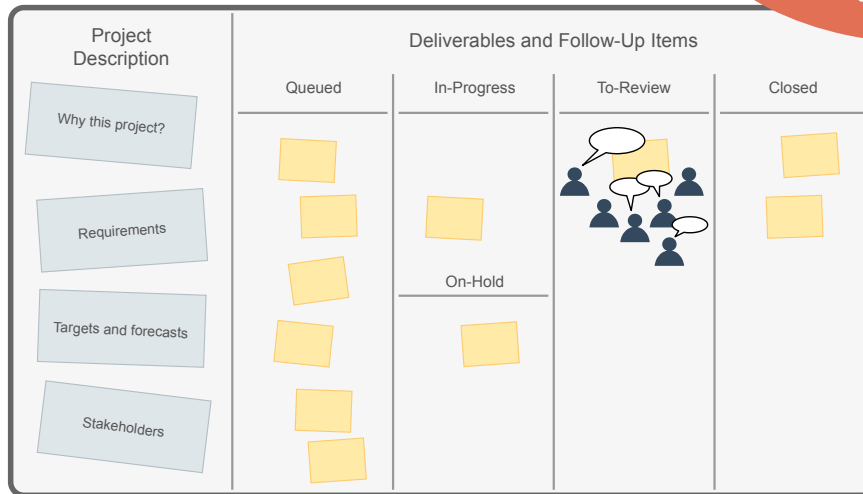
Each card has a few acceptance criteria, and sometimes, some of those criteria apply to all cards. Instead of repeating them, we can extract them and store them in a meta-card.

Sometimes, you can have different groups of cards, with general acceptance criteria for each group. It's also helpful to organize them based on groups if needed.

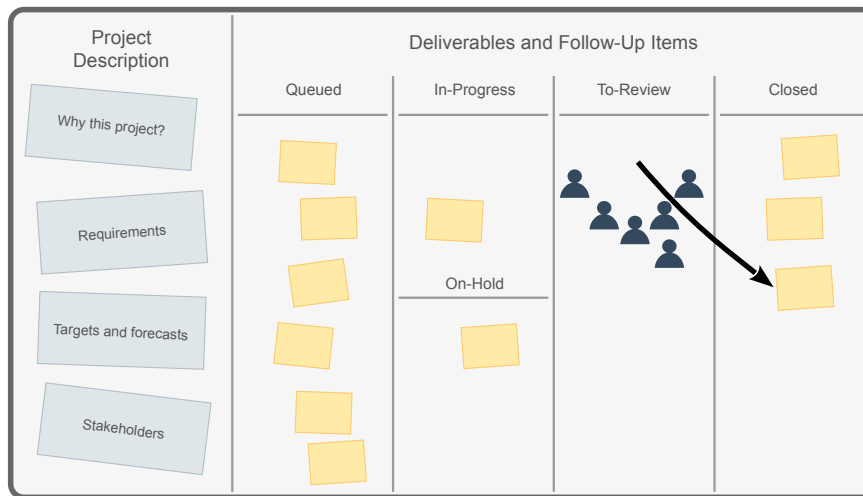
This can be the case in most IT development projects but not necessarily in all projects.

### Integrated Project Board

*The whole team or a subset of it reviews the card*

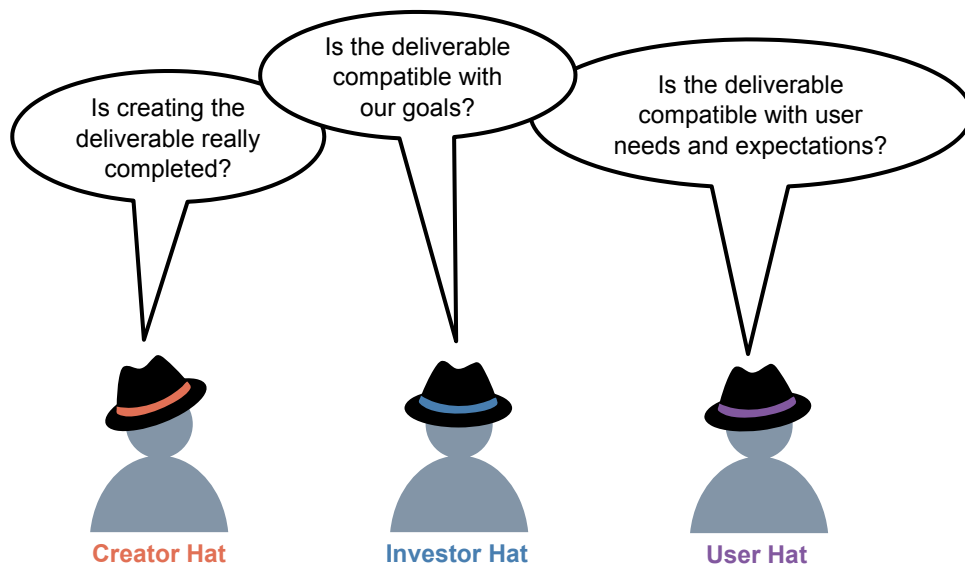


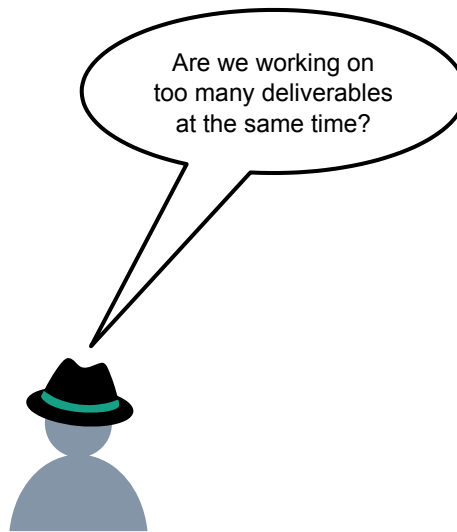
### Integrated Project Board





D2 – Close completed deliverables





Project Manager Hat

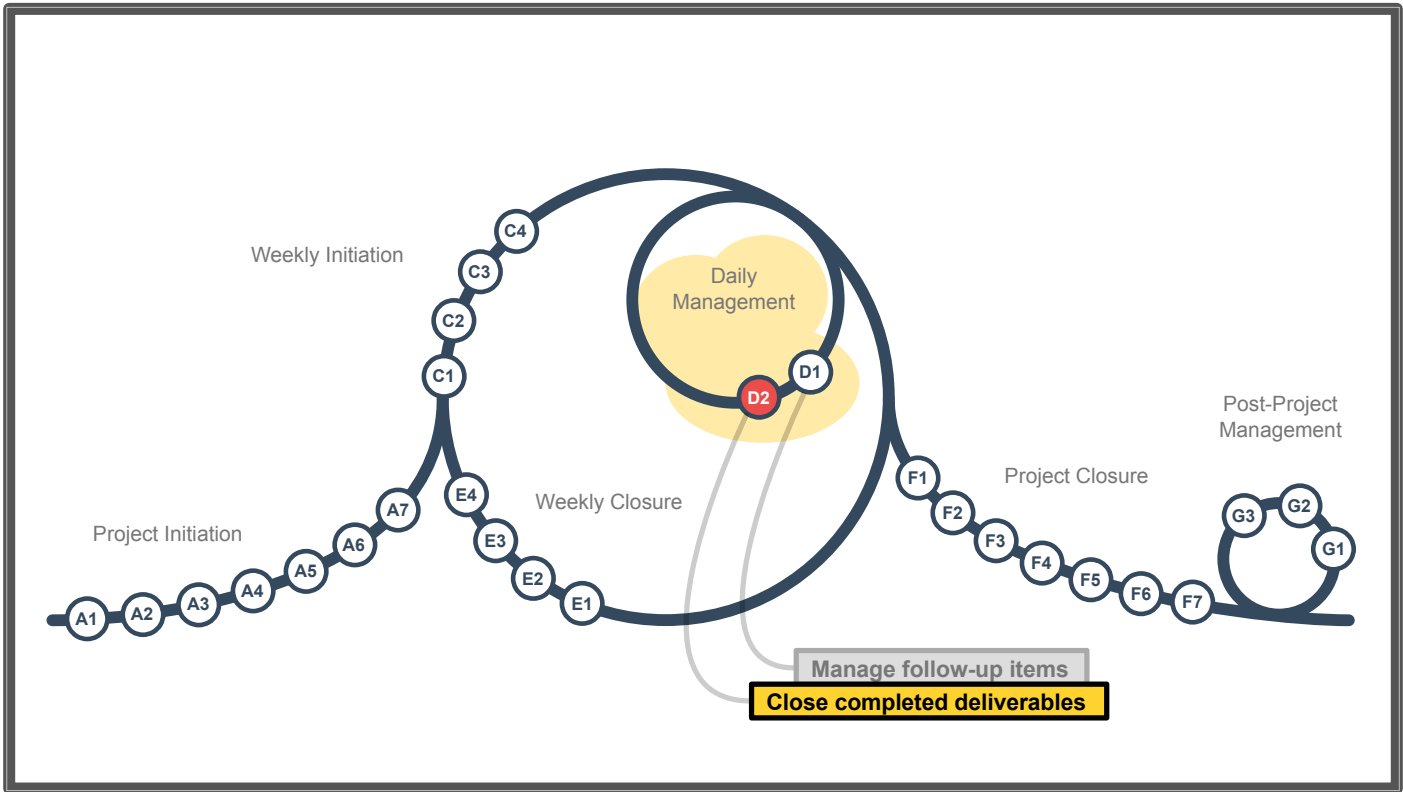
It's important to limit parallel work. The optimum amount of parallel work depends on the project, but it's usually lower than what most people expect.

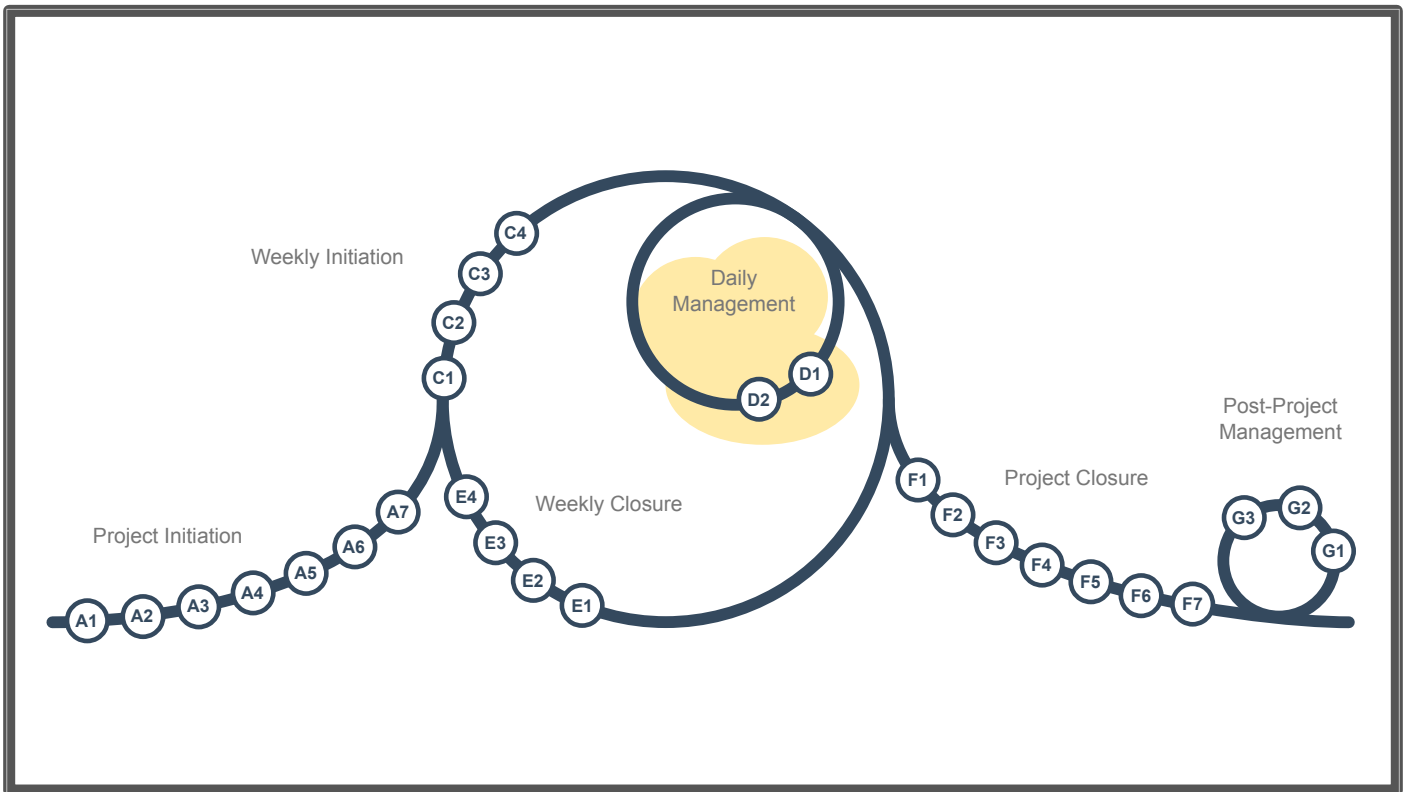
D2 – Close completed deliverables

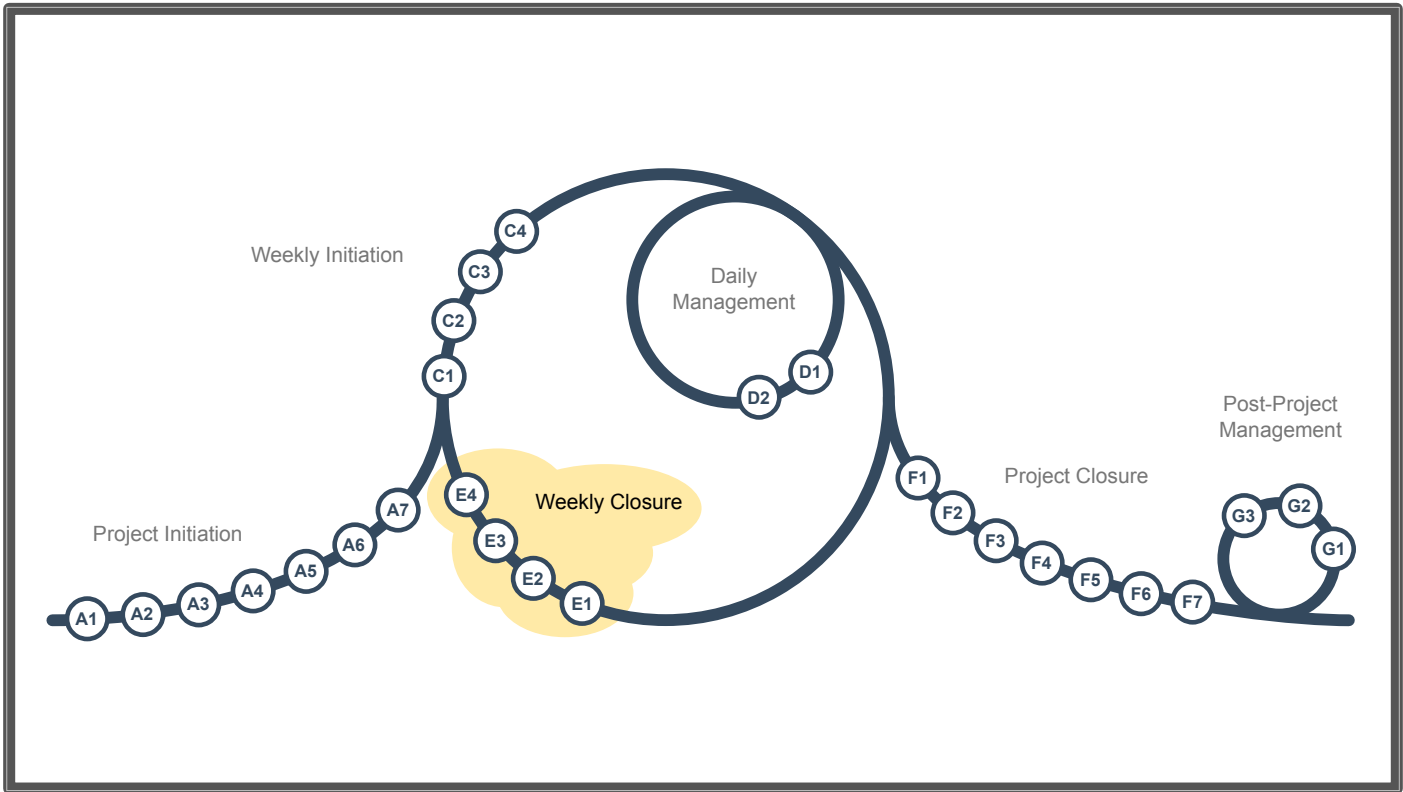
Are the documents  
clear and easy to  
understand?

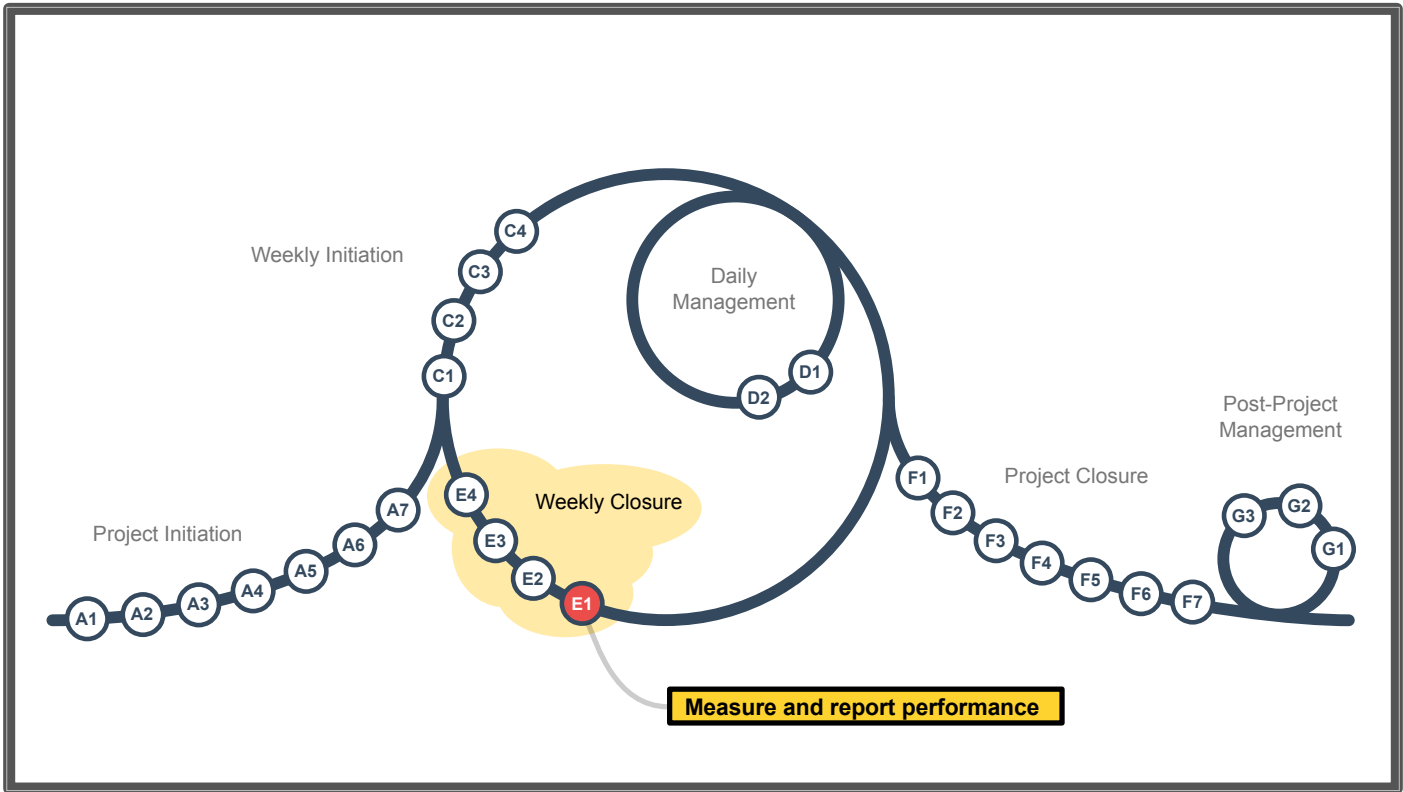


Project Manager Hat

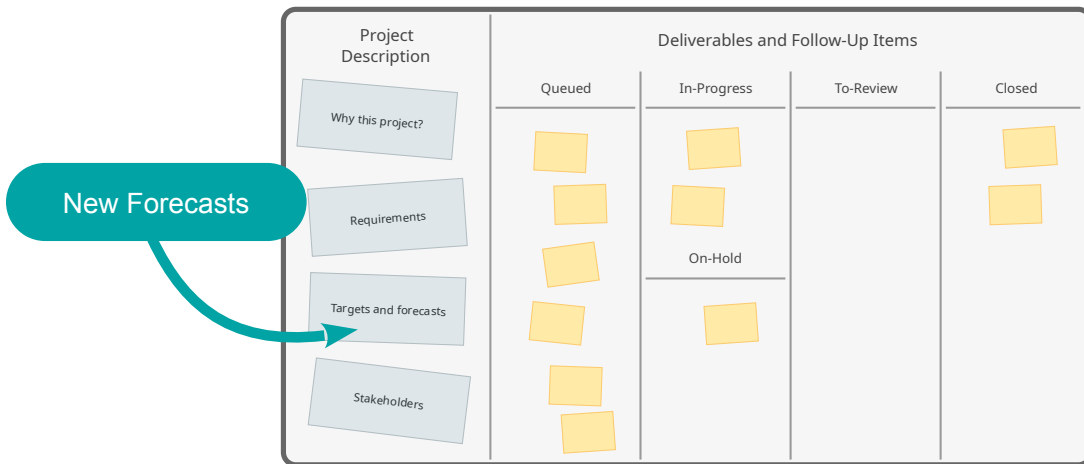








### Integrated Project Board

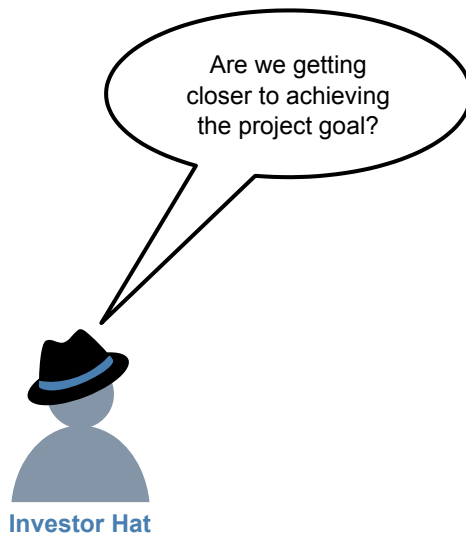


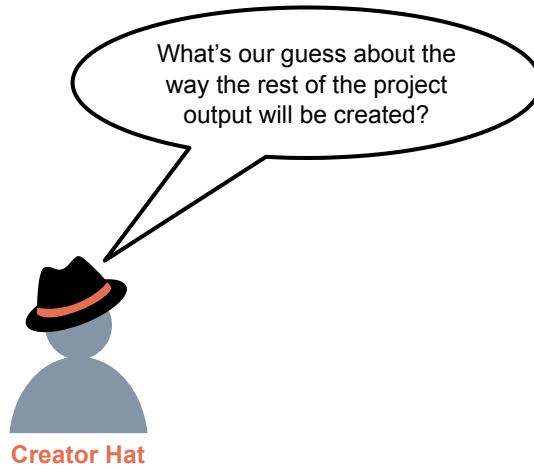
The main thing we need is forecasts for when the project will be finished, how much it will cost us, etc. How it can be calculated depends on the project, and it's up to the Project Manager Hat to ensure the team finds a good way of doing so.



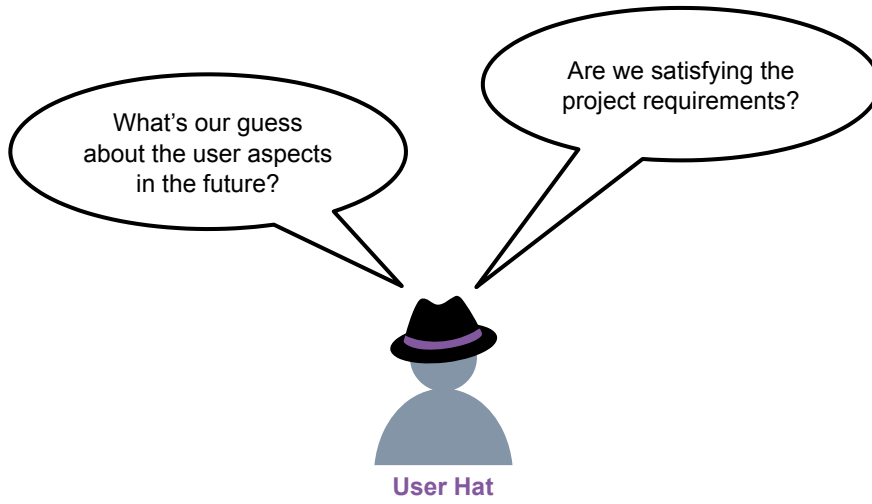
What concerns do you think each hat should have  
in this management activity?





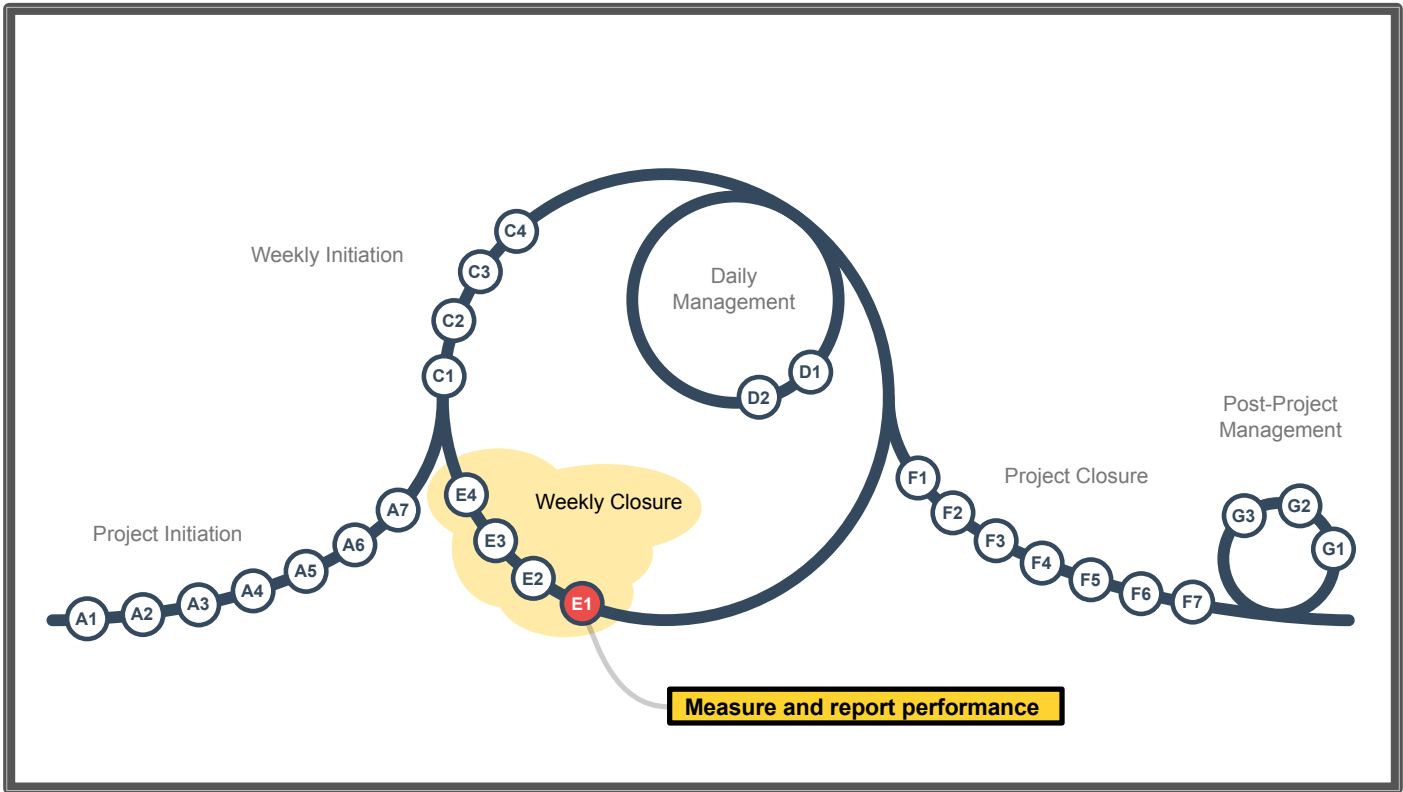


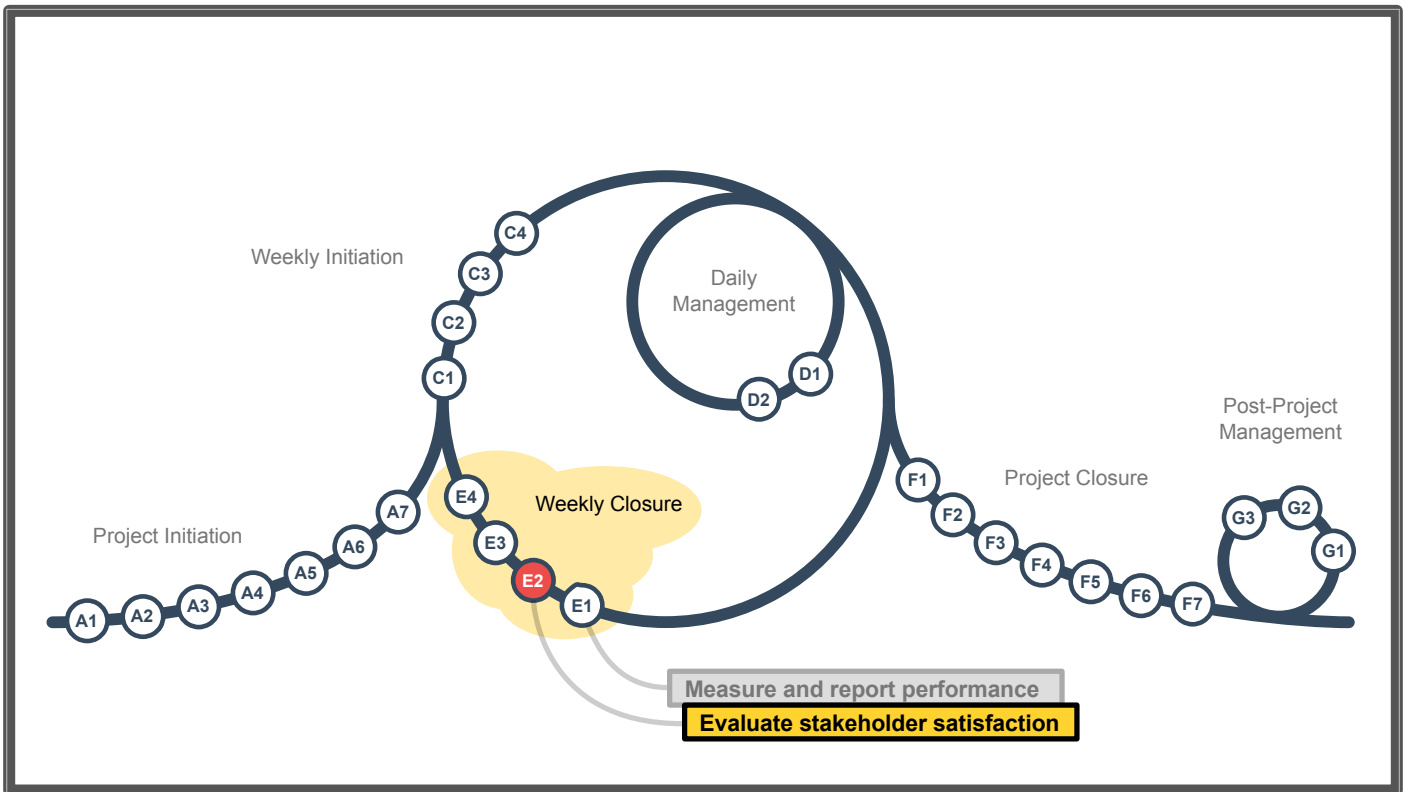
E1 – Measure and report performance





Reporting depends on the project and the recipient. A copy of the Integrated Project Board may be enough for many, but you may also need to design one or more other types of reports. The reporting method should be stored in the “stakeholders” meta-card.



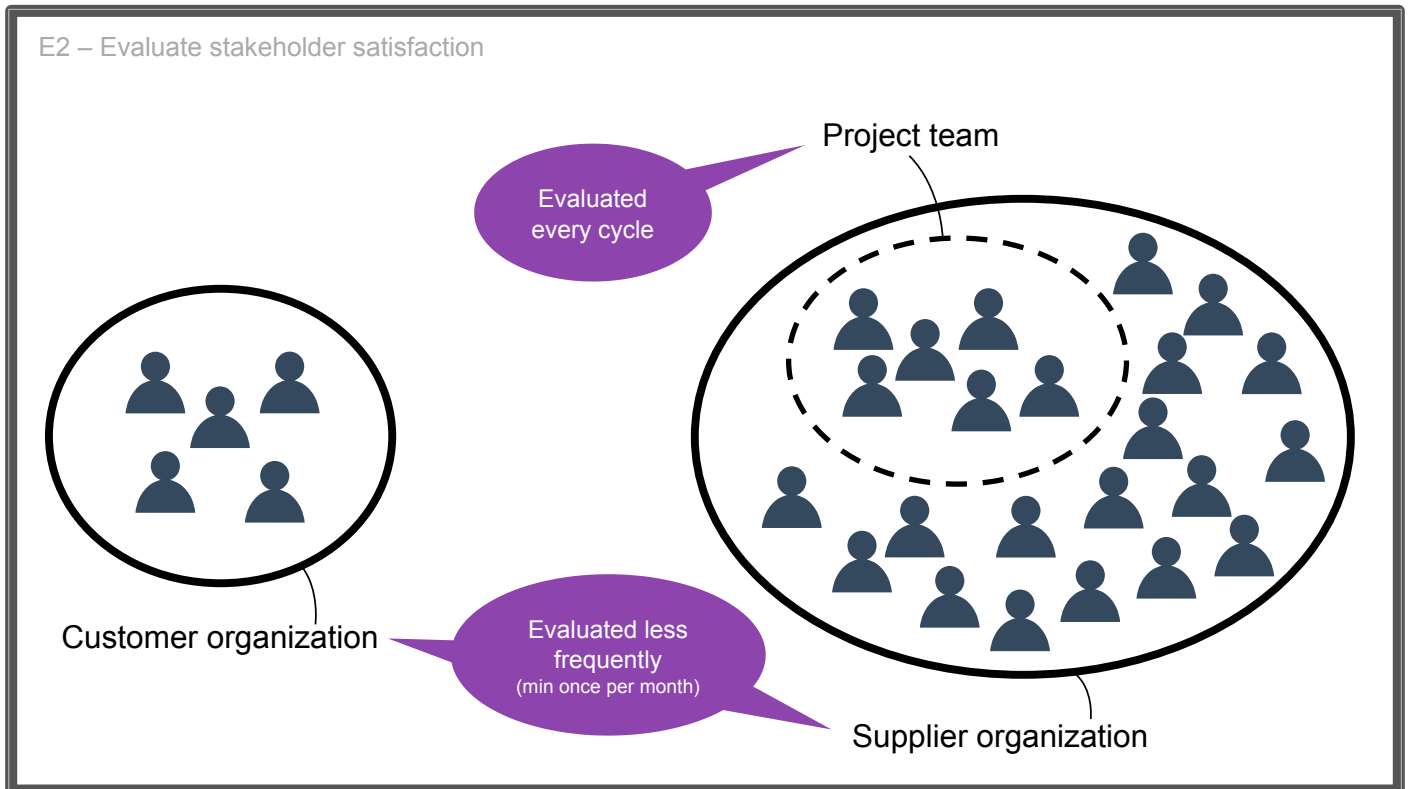


E2 – Evaluate stakeholder satisfaction



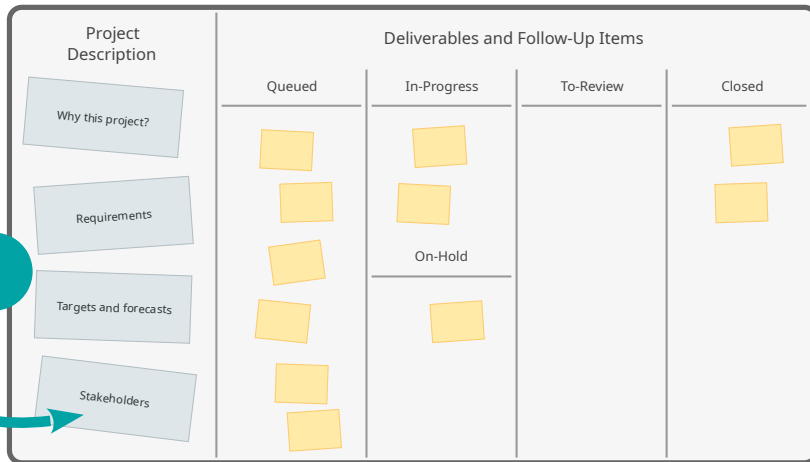


E2 – Evaluate stakeholder satisfaction



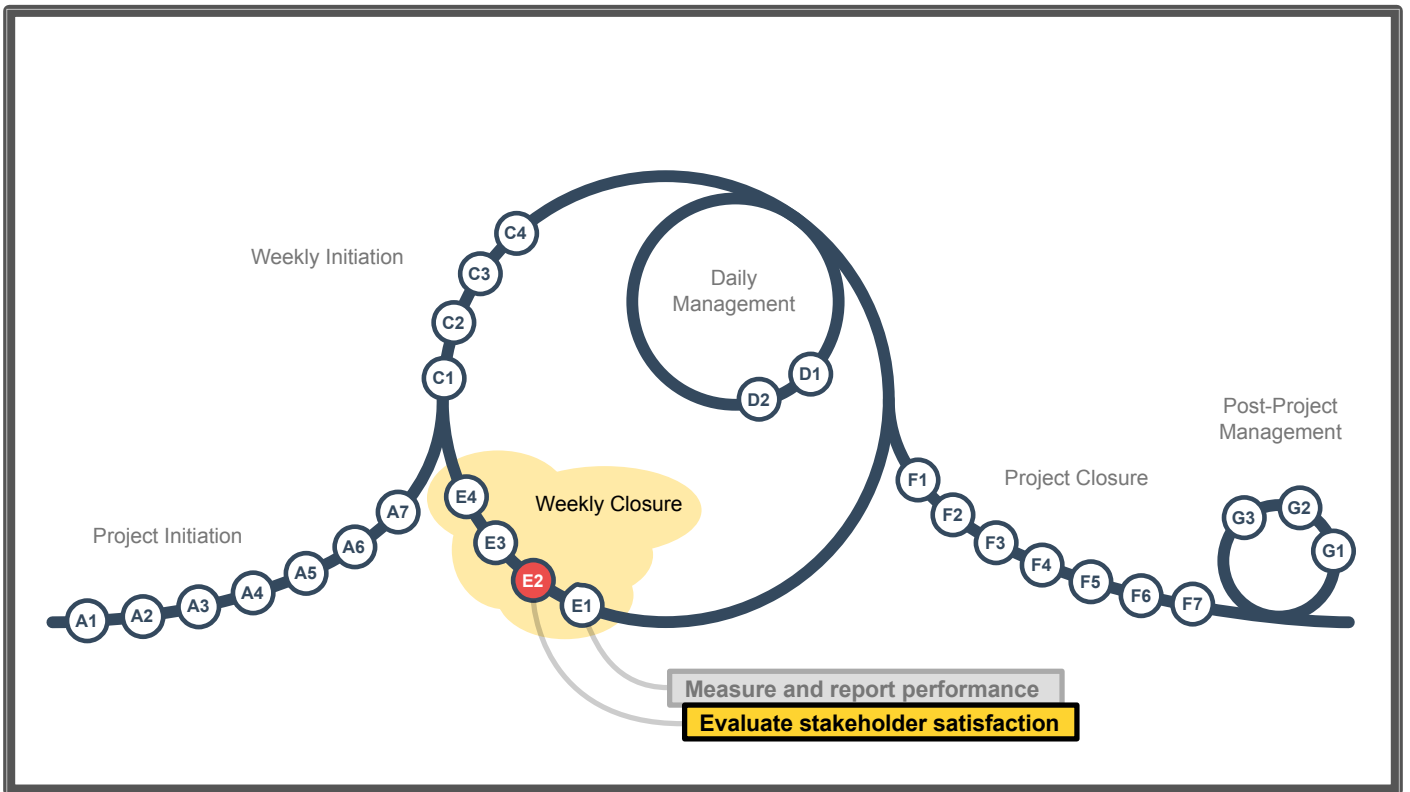
Short, anonymous questionnaires usually do it, but the team can decide on any method they want.

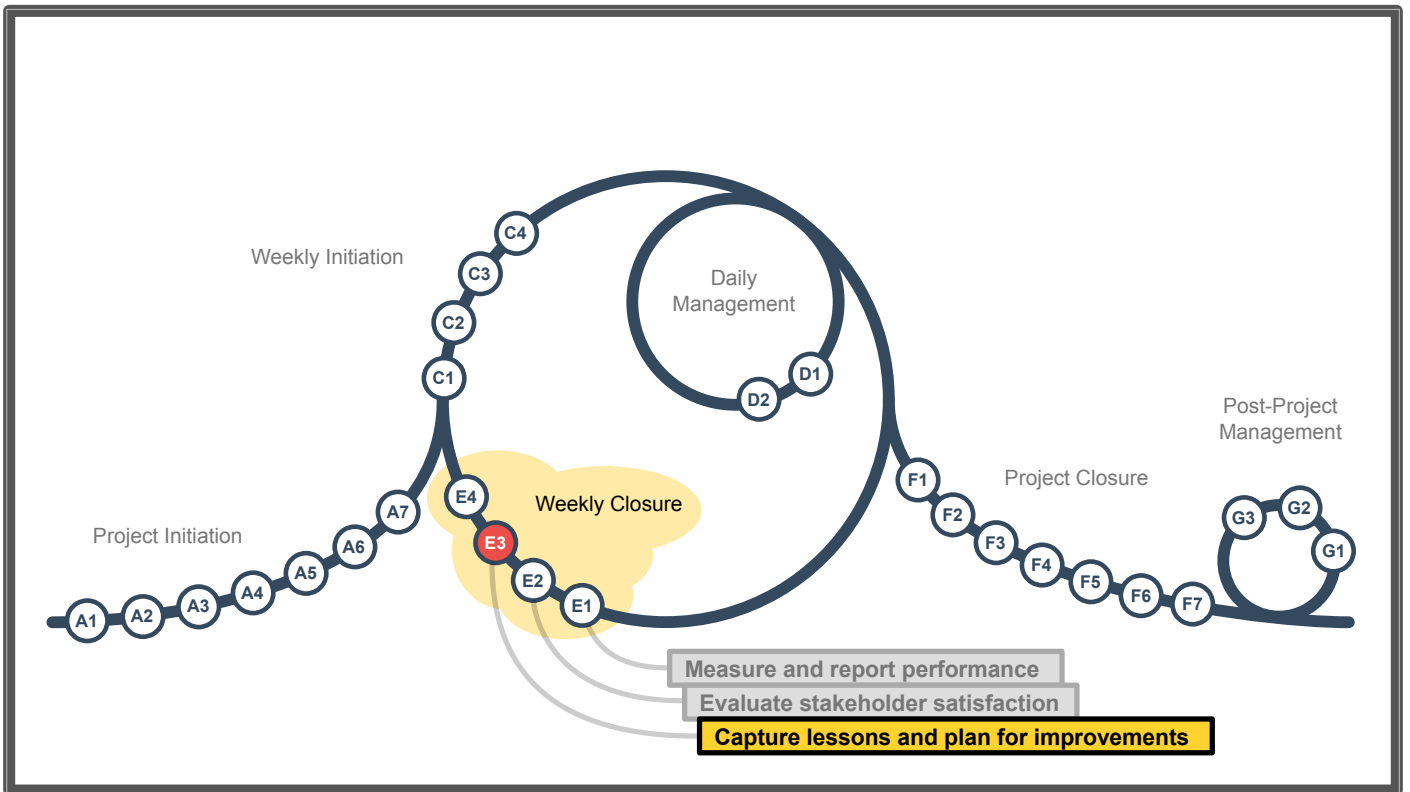
### Integrated Project Board



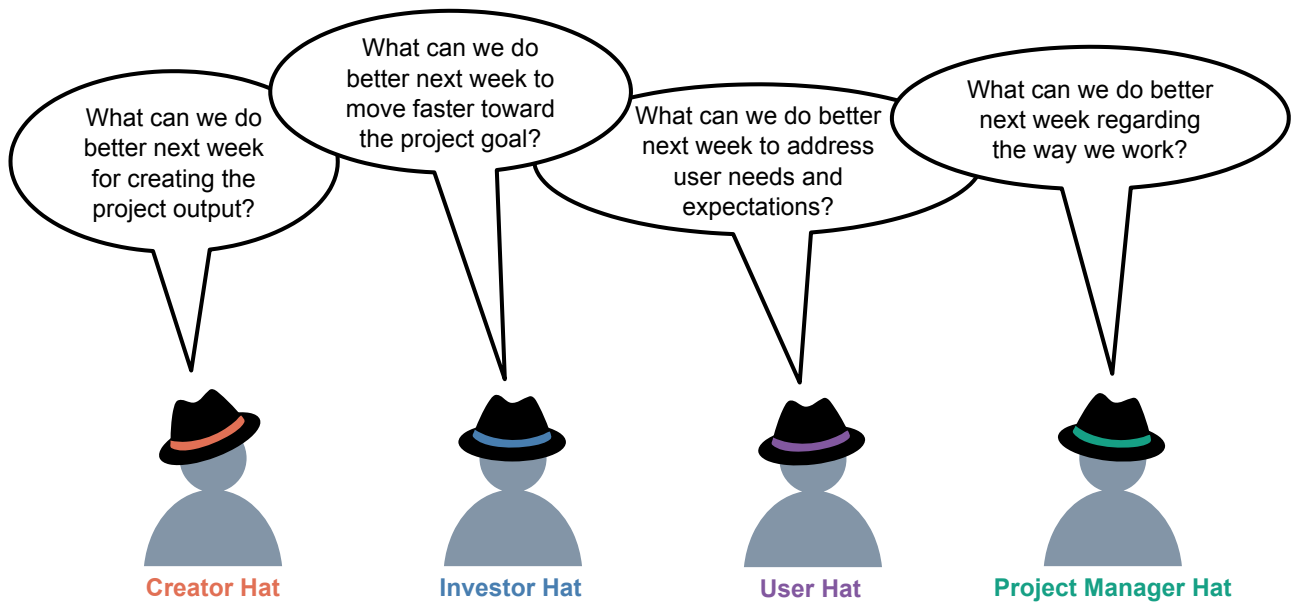
Evaluation Results





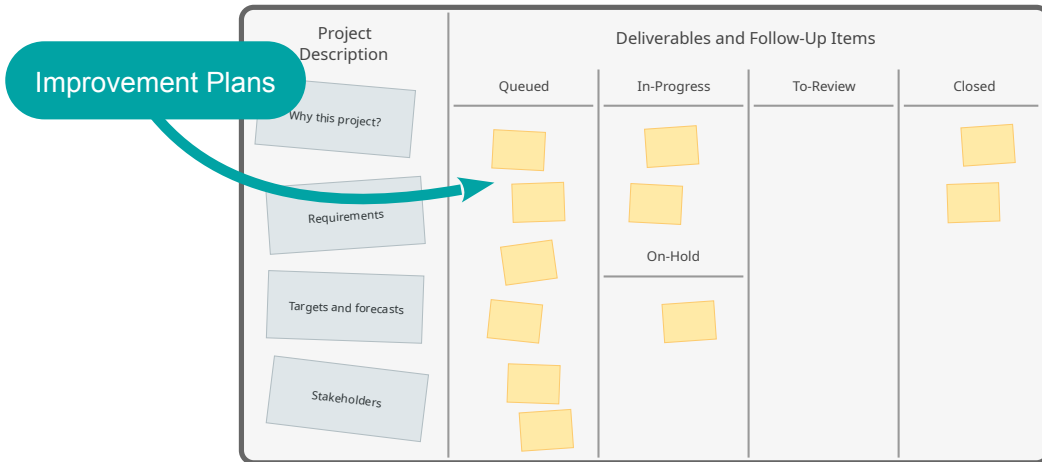


E3 – Capture lessons and plan for improvements

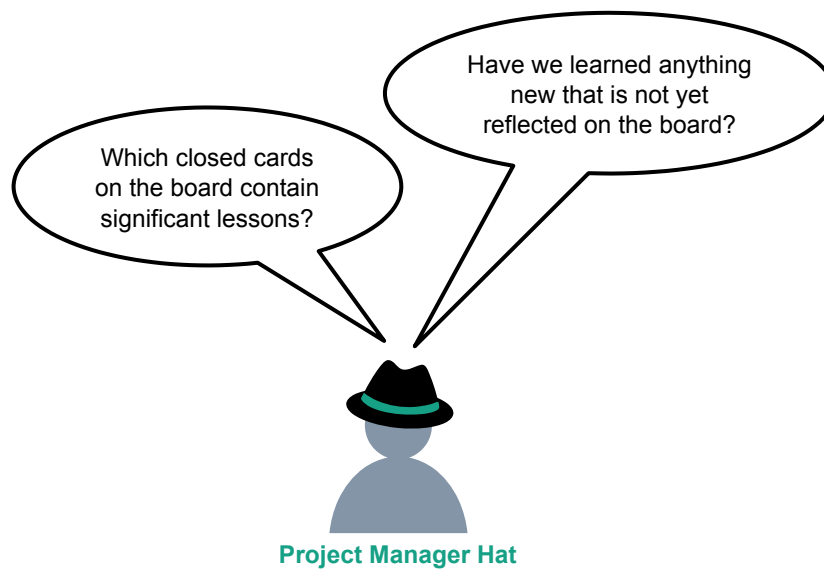


This is about designing improvement plans

### Integrated Project Board



The improvement plans, like any other follow-up item, go to the “queued” column of the board. Then you need to revise the sequence of cards in that column.

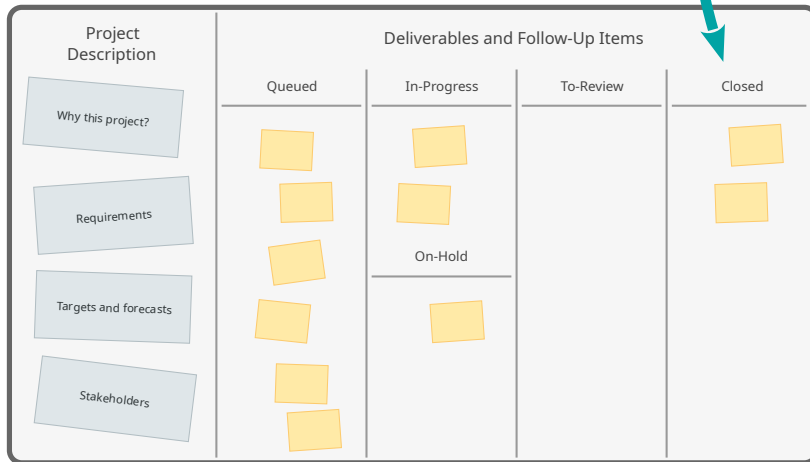


Remind them that we don't capture lessons at the end of the project or even at the end of cycles, but it's done continuously. What we do here is:

- Mark the cards that contain significant lessons
- Double-check to see if any lessons are missing (if so, we'll either add them as comments to existing cards or create stand-alone cards for them)

Lessons Learned

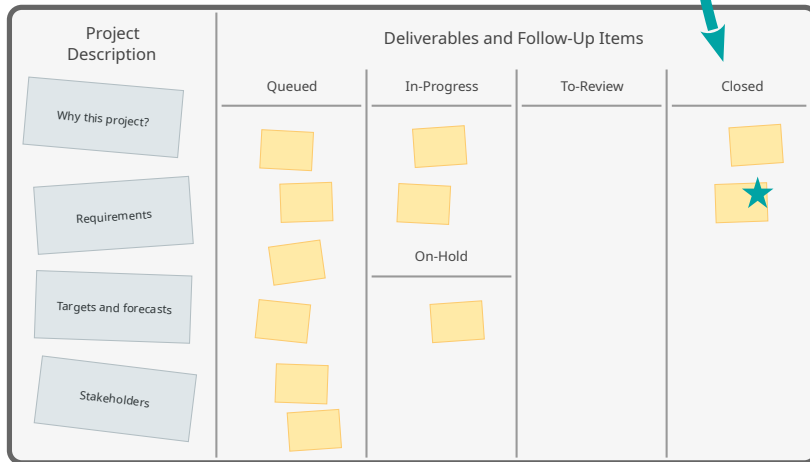
### Integrated Project Board



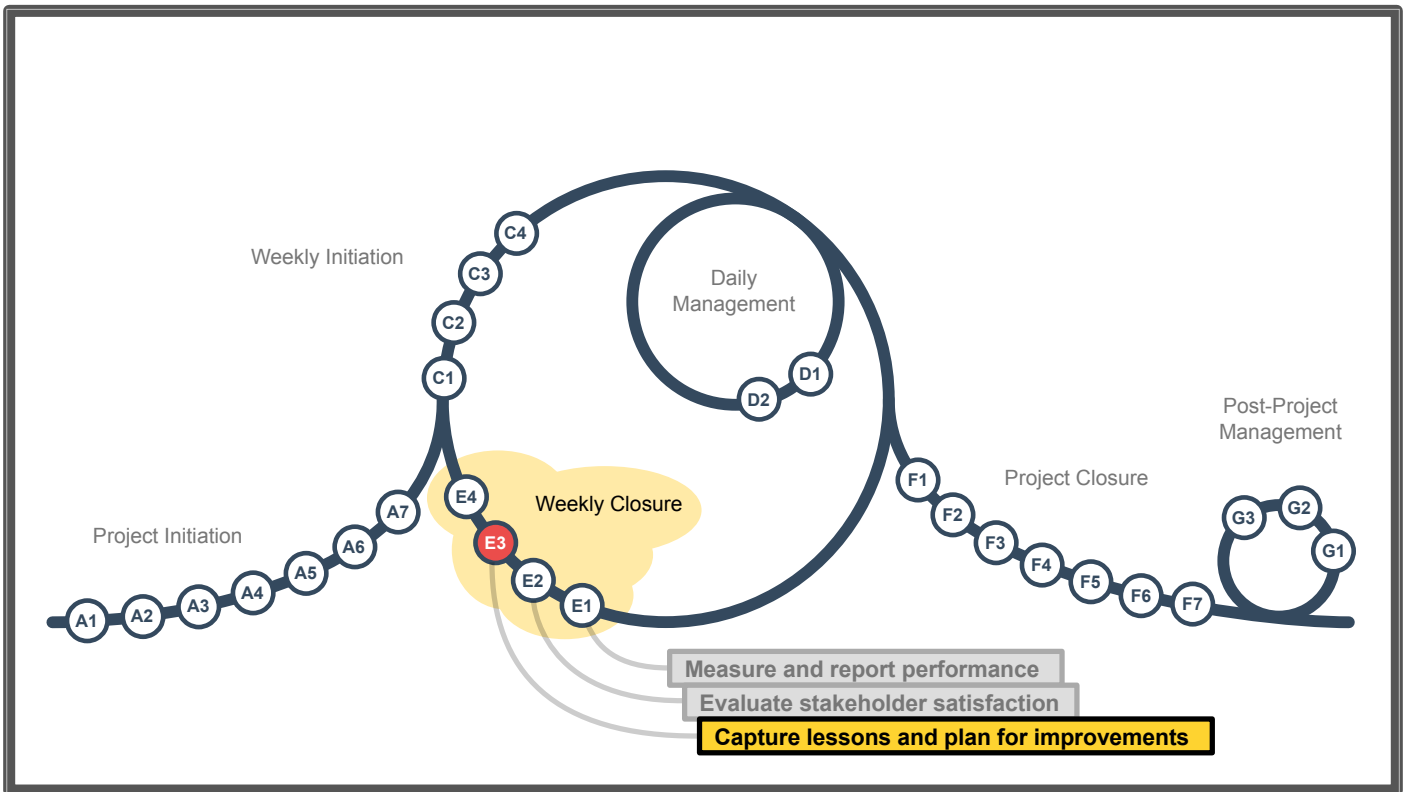


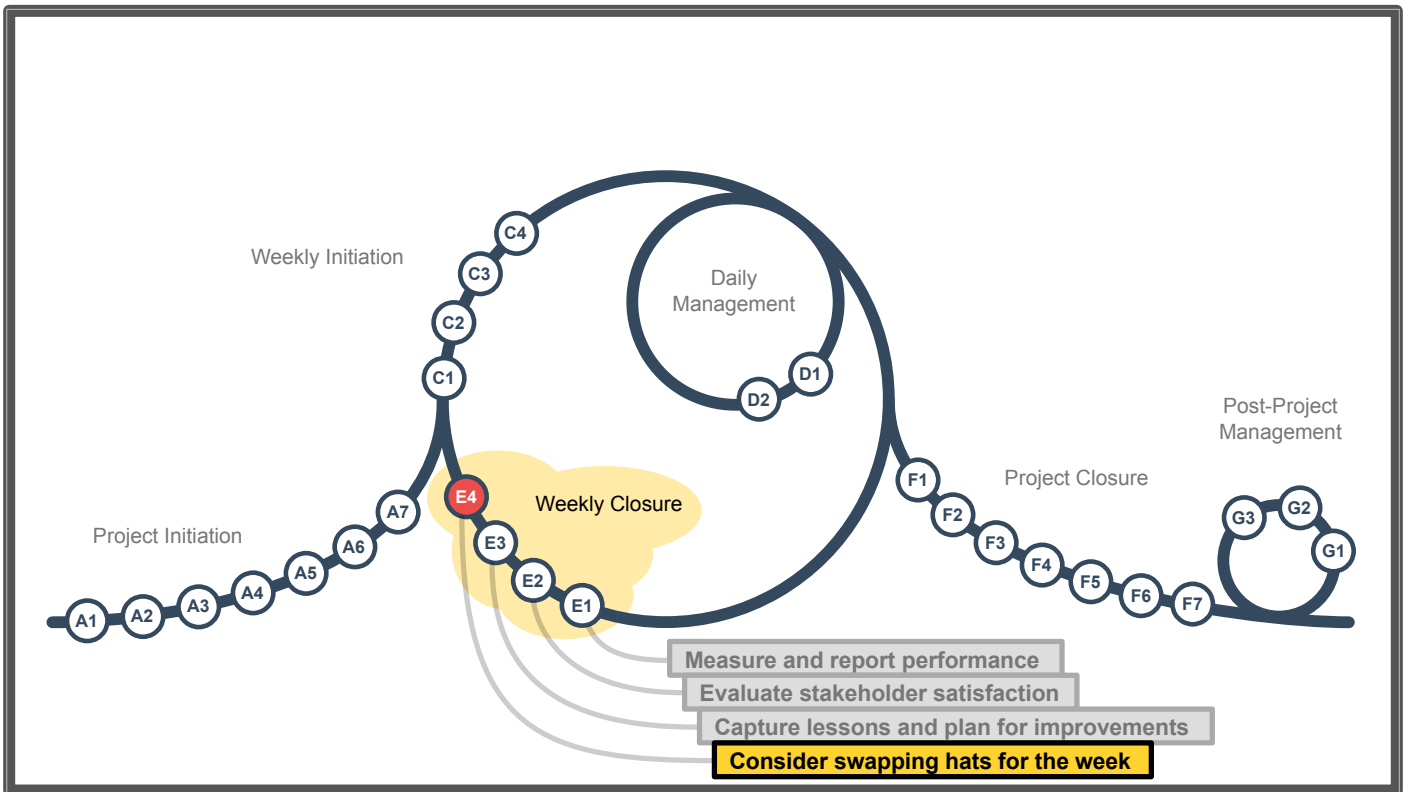
Lessons Learned

### Integrated Project Board



Mark deliverables and follow-up items that contain important lessons.

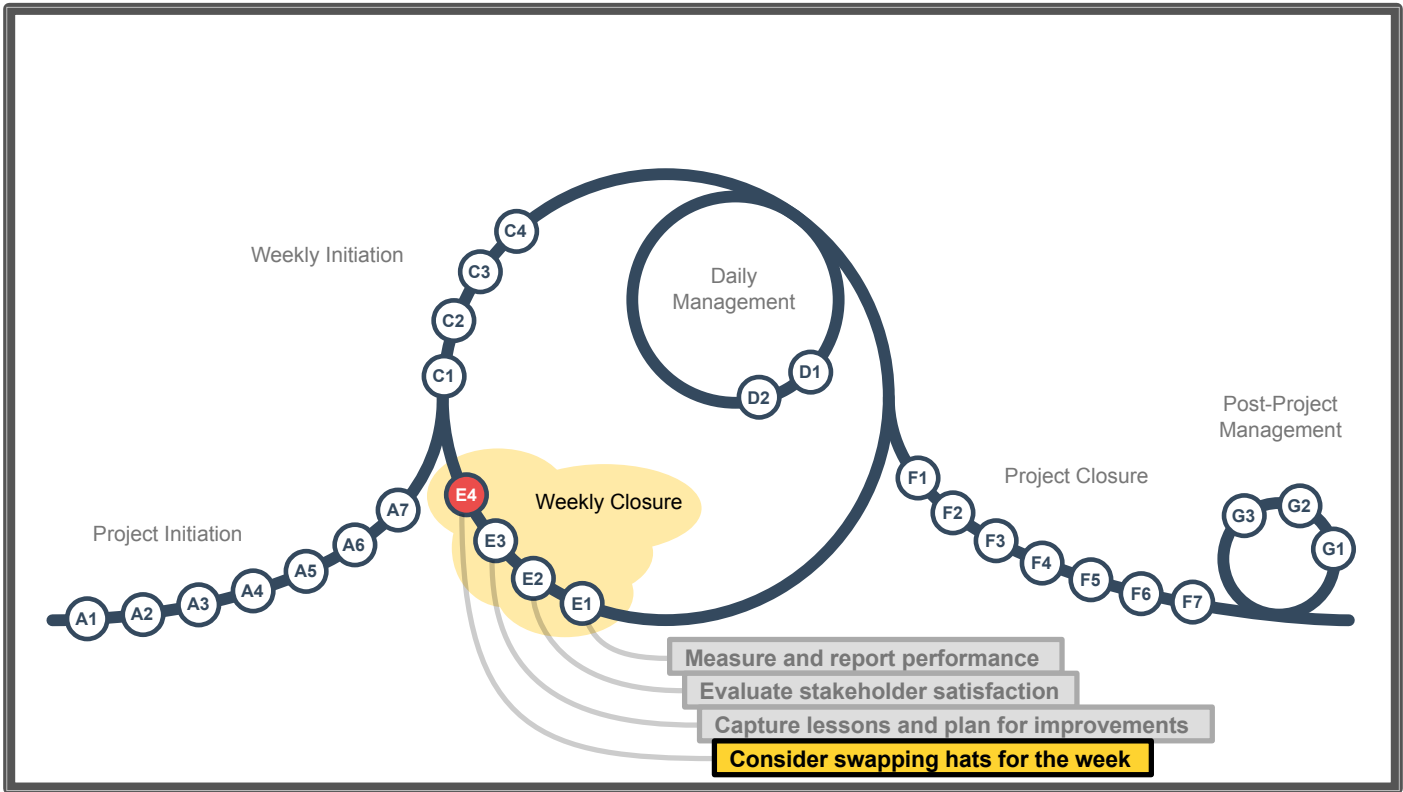


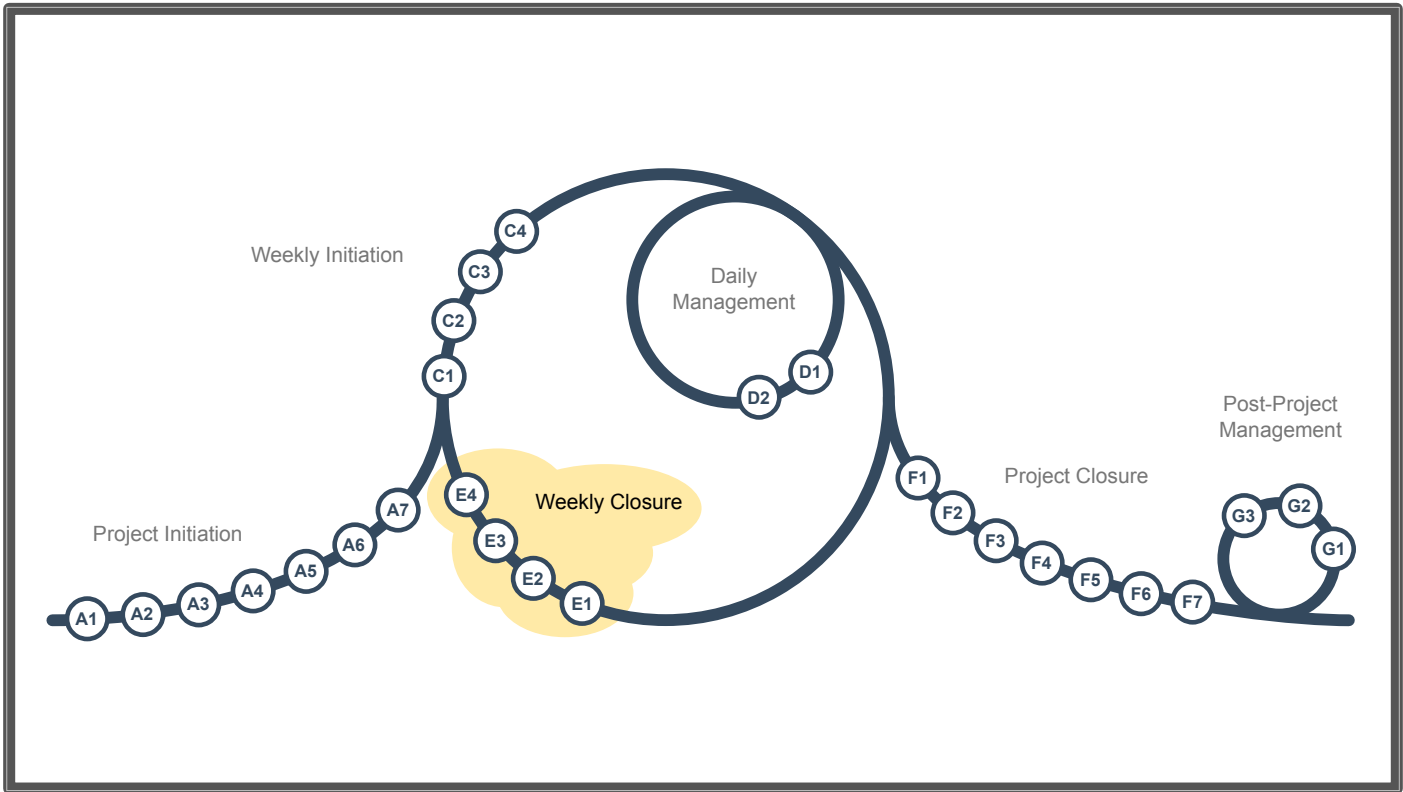


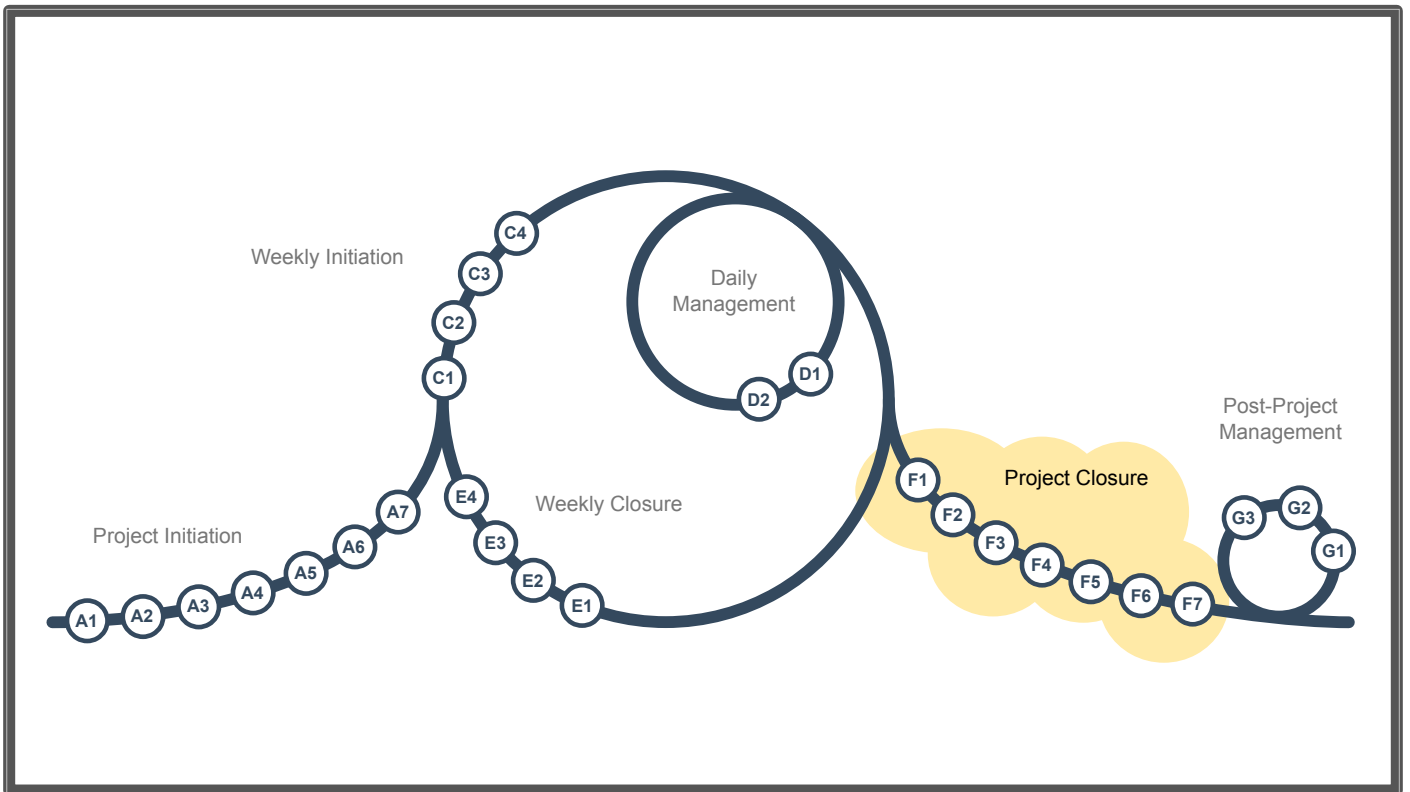
E4 – Consider swapping hats for the week

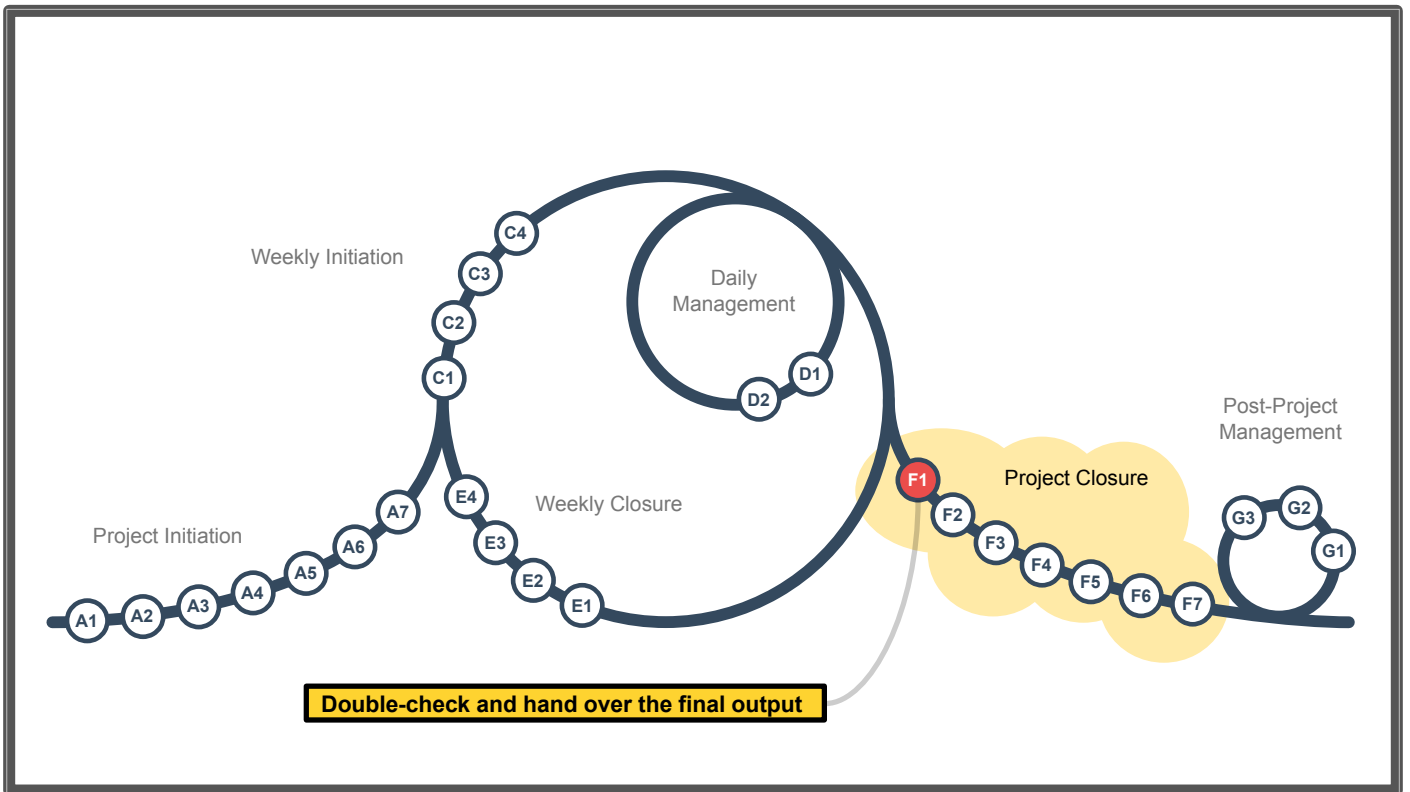


Remind them that we don't have to swap hats if we can't, but when possible, we really like to do so. Maybe review its advantages as well, or ask the opinion of your audience about it.



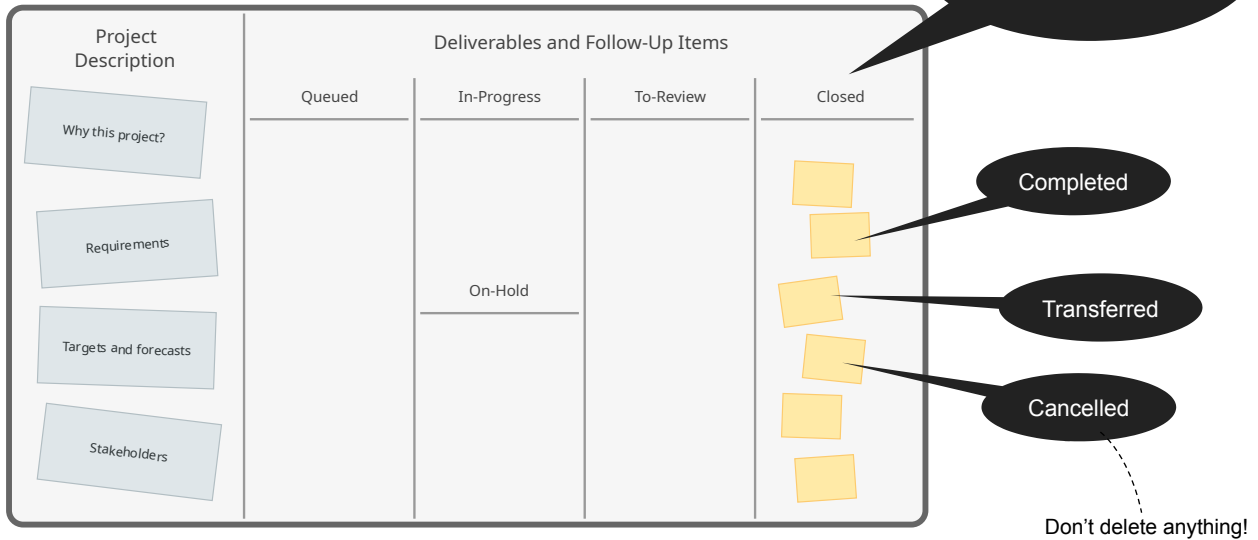








## F1 – Double-check and hand over the final product



At the end of the project, **EVERYTHING** must be closed. If still half of the work remains and the sponsor says that it's enough, you would simply mark the undone deliverables as "canceled" and move them to the "closed" column.

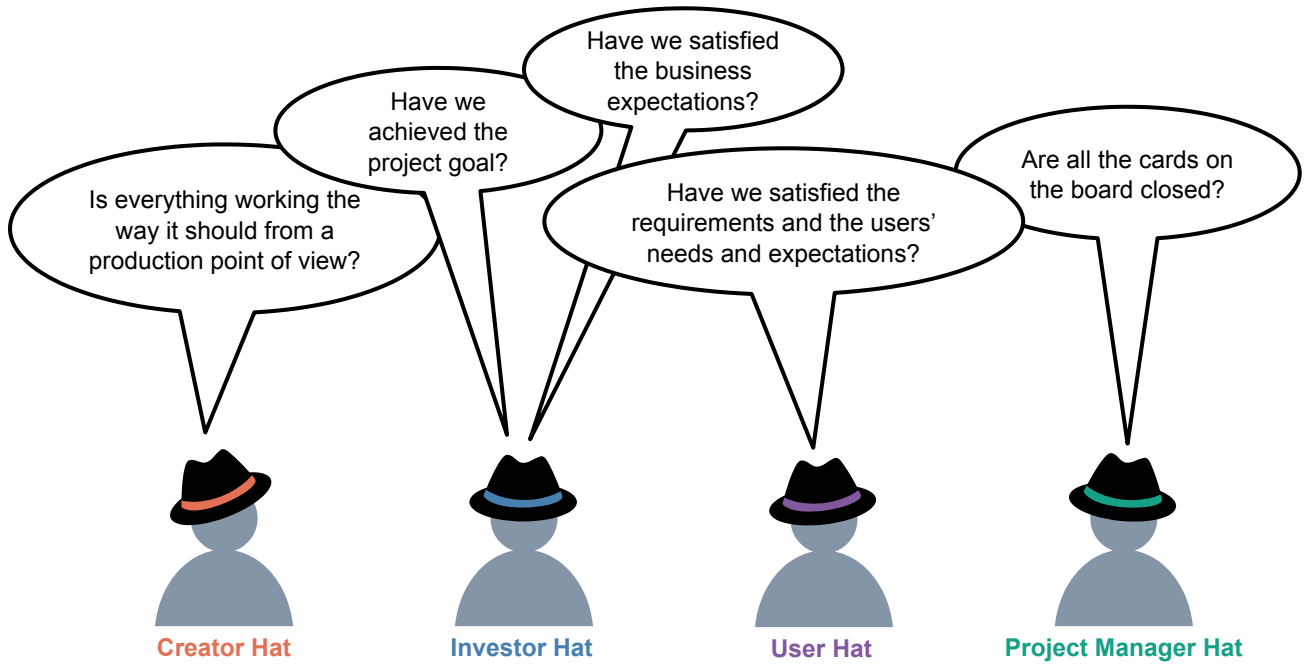
Also, note that if the decision is to finish the project before the whole scope is done, that would be a revision in the common understanding of the project, and you'd implement it during the Weekly Initiation and proceed to Project Closure; that won't be a "no-go" decision!

Sometimes, a few minor tasks remain at the end that would take a long time to finish. If the customer agrees, these can be "transferred" to a maintenance team, and the project can be closed.

What concerns do you think each hat should have  
in this management activity?



F1 – Double-check and hand over the final product



If you realize that you're not ready to close the project, you will go back to Weekly Initiation.

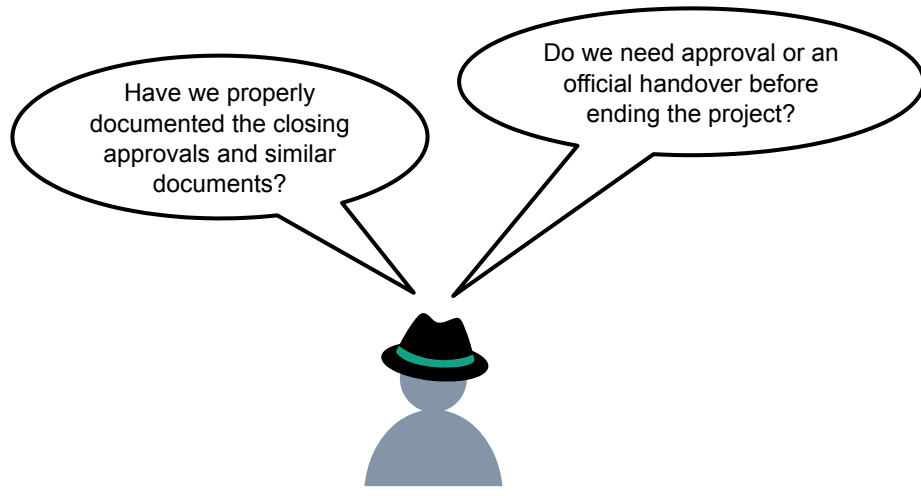
F1 – Double-check and hand over the final product

Do we need to prepare  
any additional information  
for the maintenance  
team?

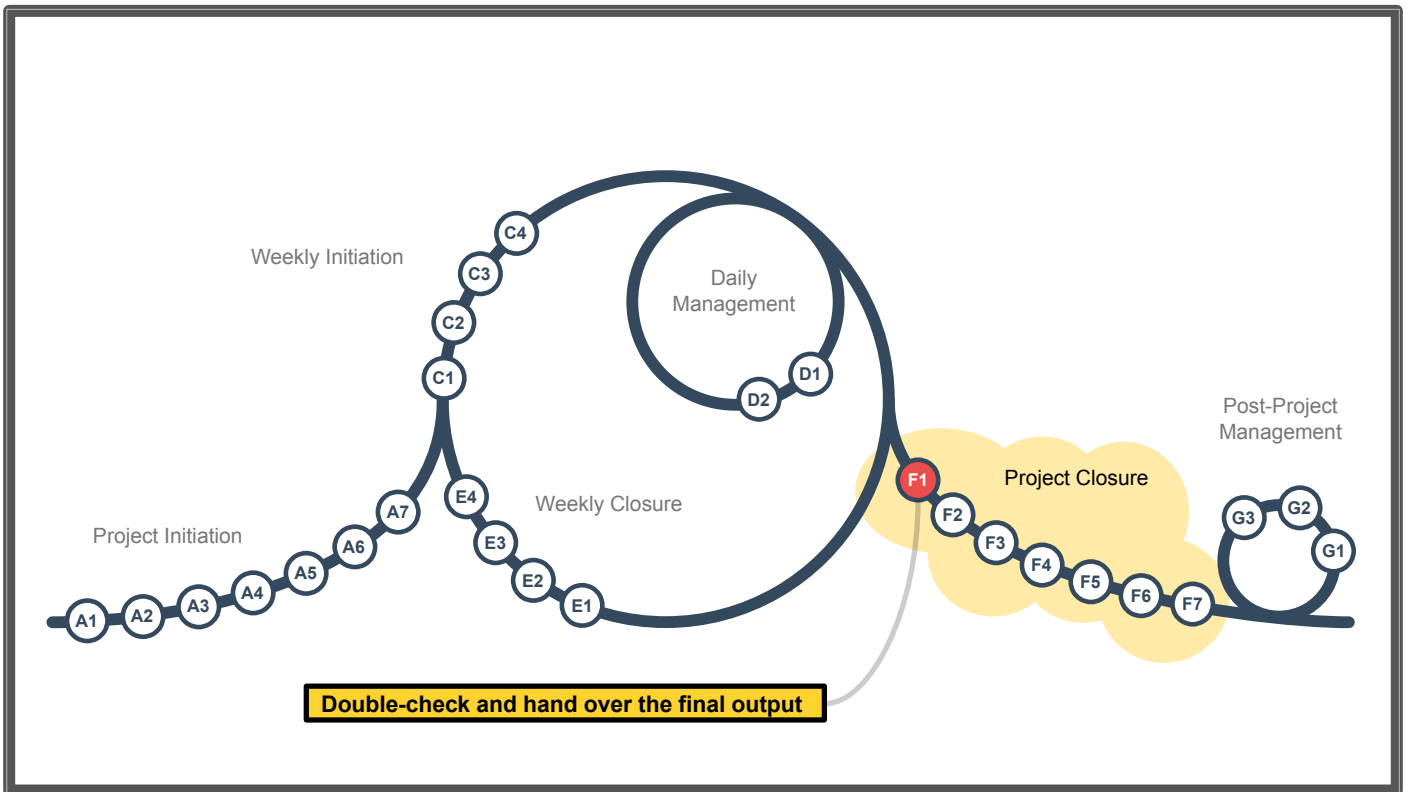


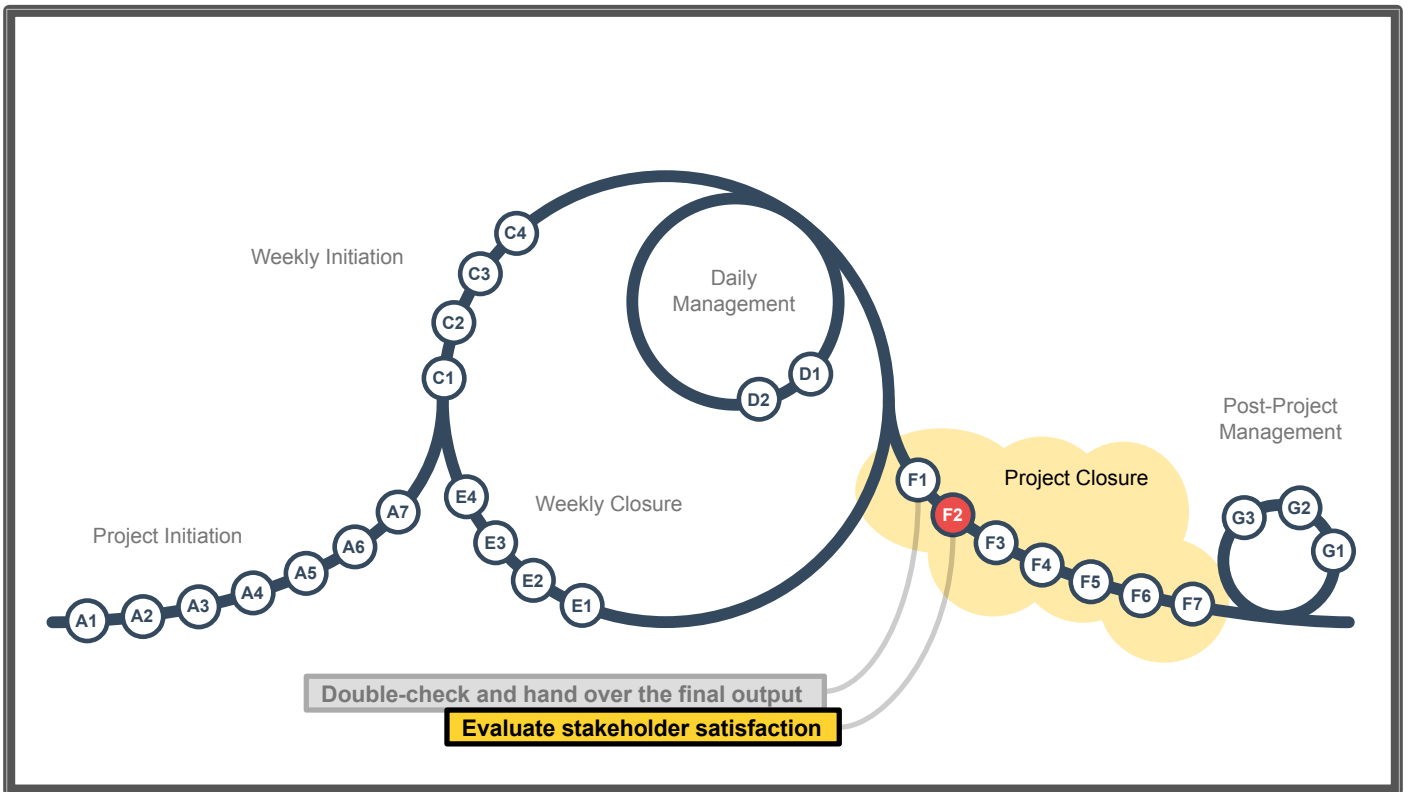
**Creator Hat**

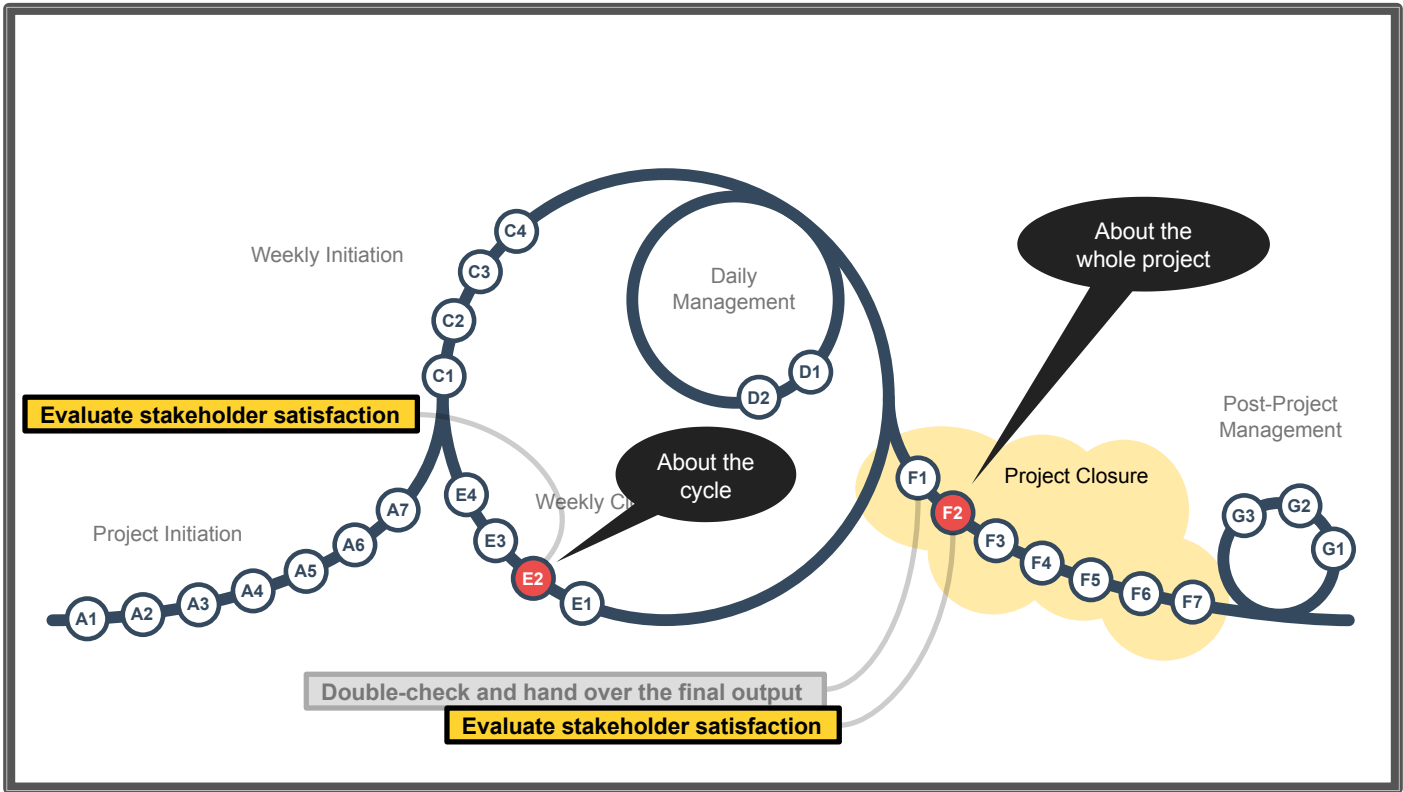
F1 – Double-check and hand over the final product



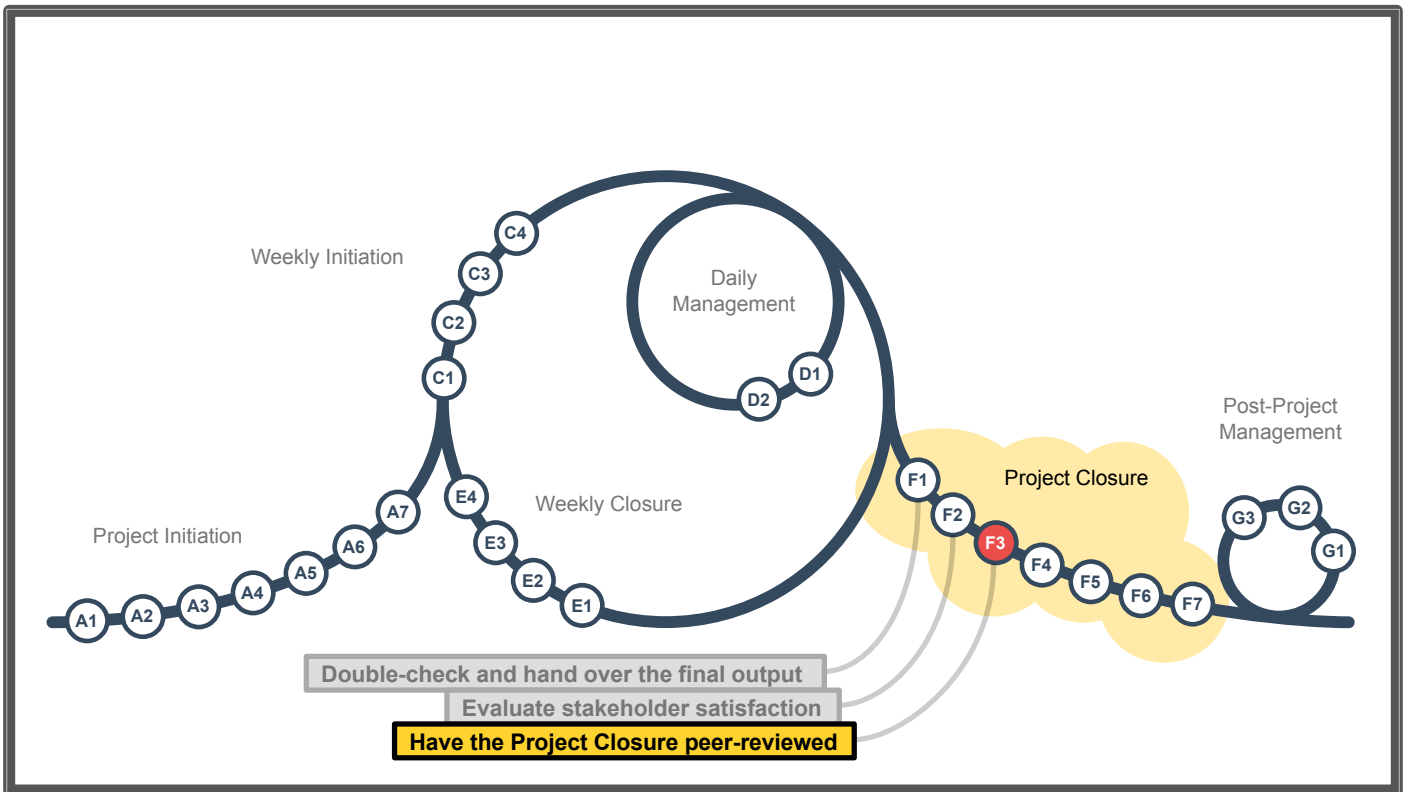
Project Manager Hat



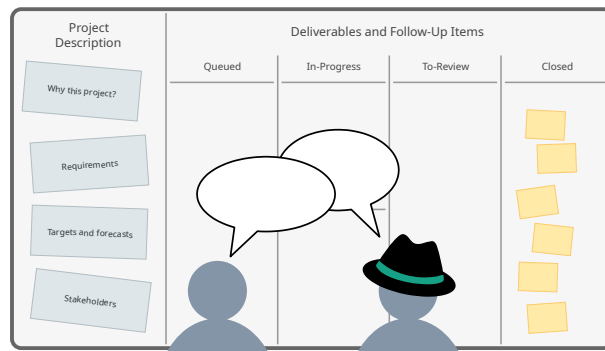








### F3 – Have the Project Closure peer-reviewed



Peer Reviewer

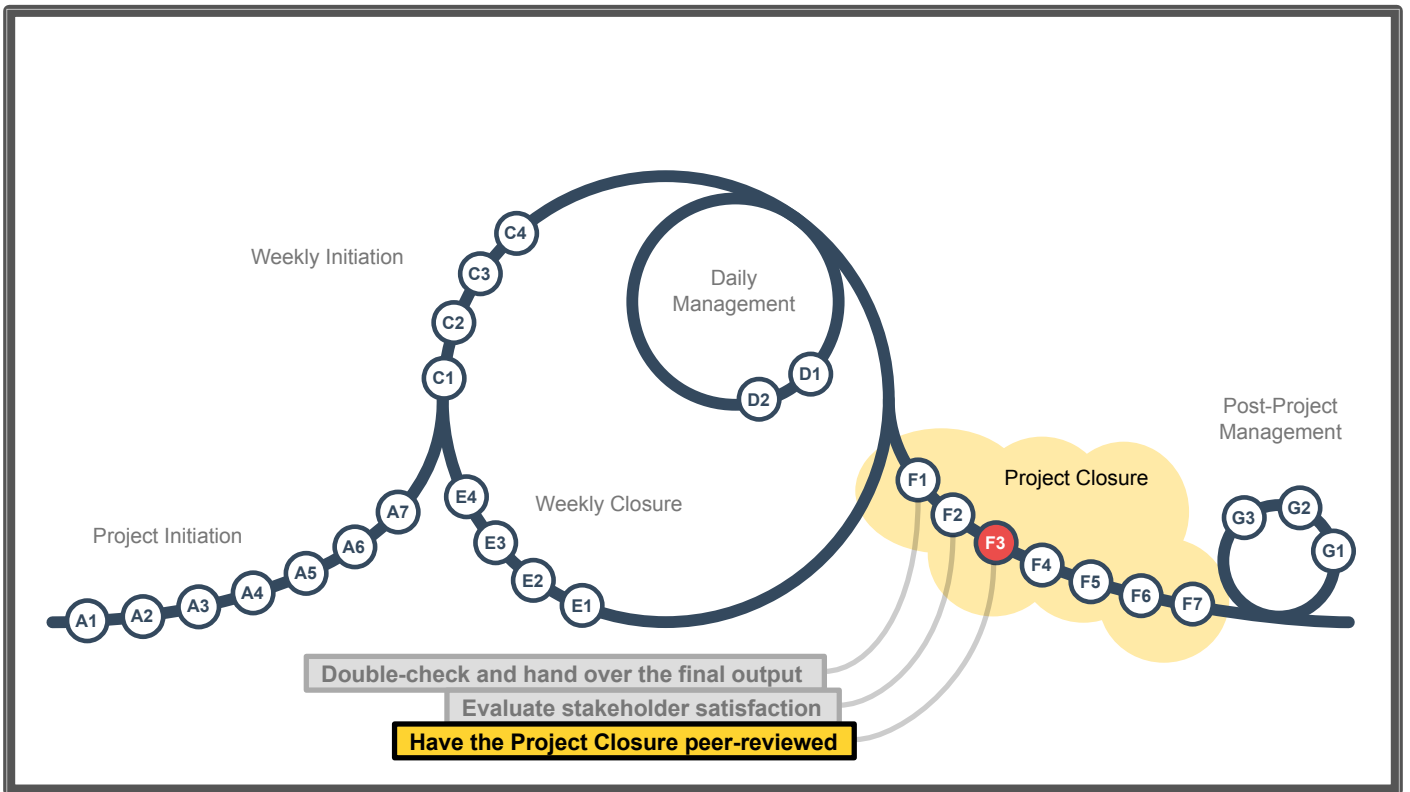
Project Manager Hat

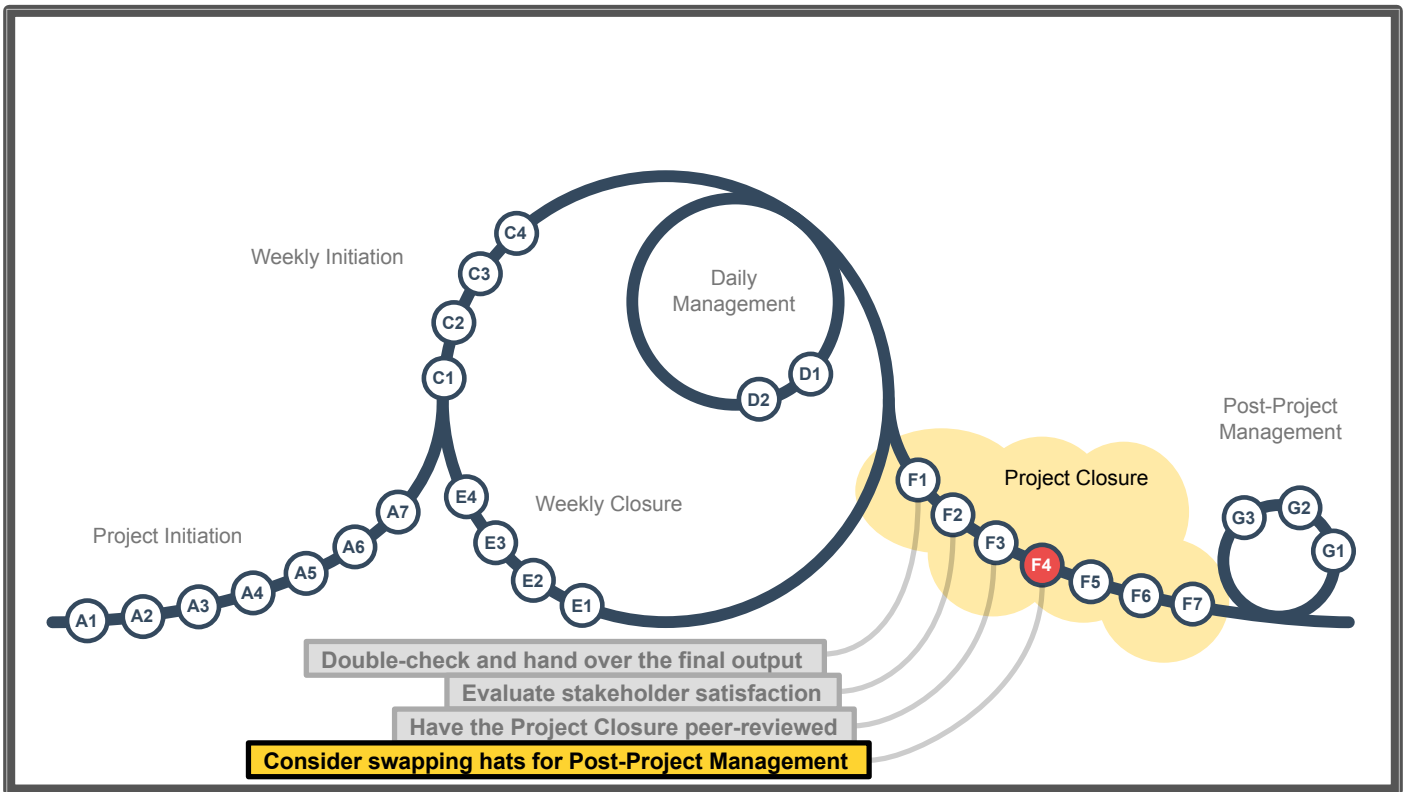
External to the project  
Expert in project management  
(A different person each time)

- ★ Helps find mistakes
- ★ Both learn from each other



Do other hats need peer-reviews as well?

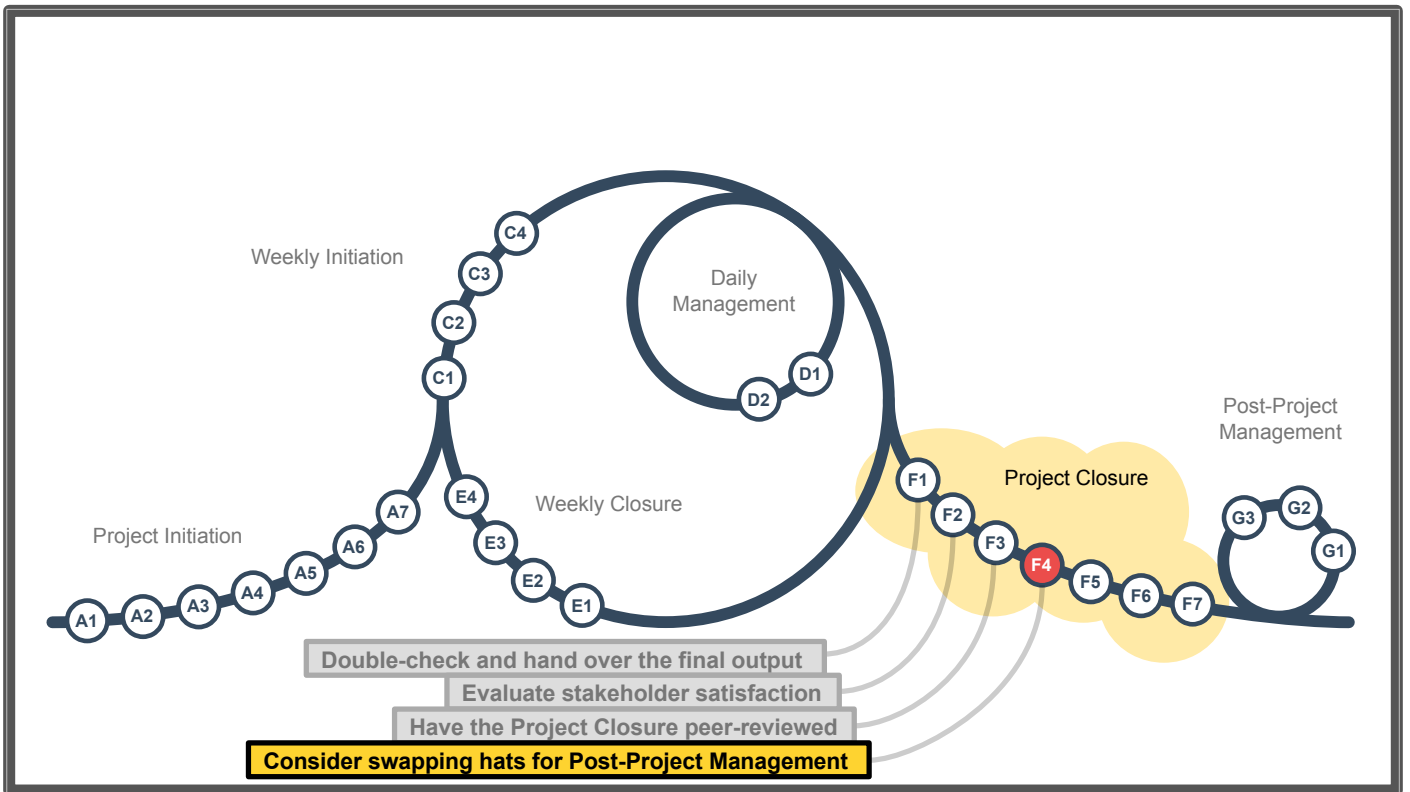


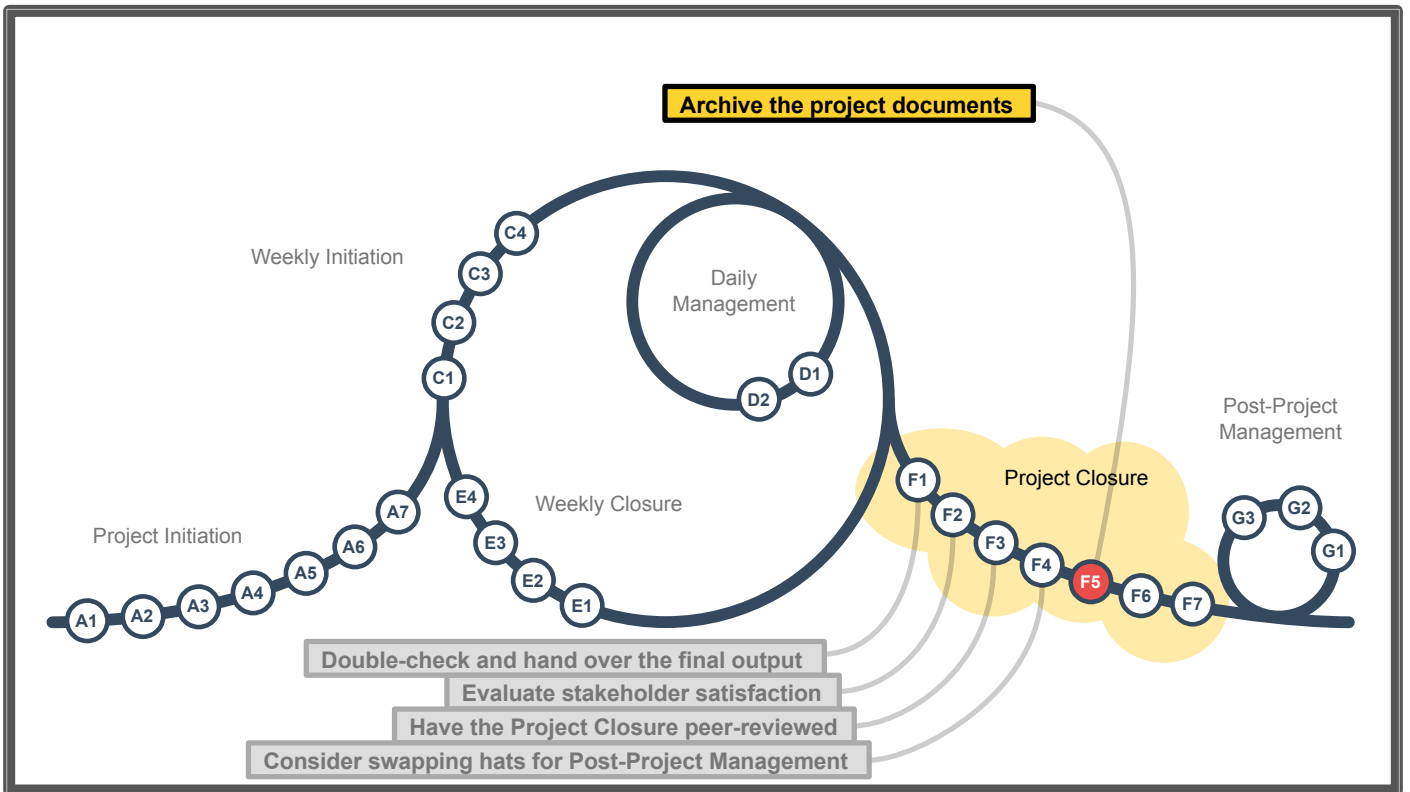


F4 – Consider swapping hats for Post-Project Management



Normally, this is the last time we swap hats, and the new hat assignments remain for the whole Post-Project Management period.

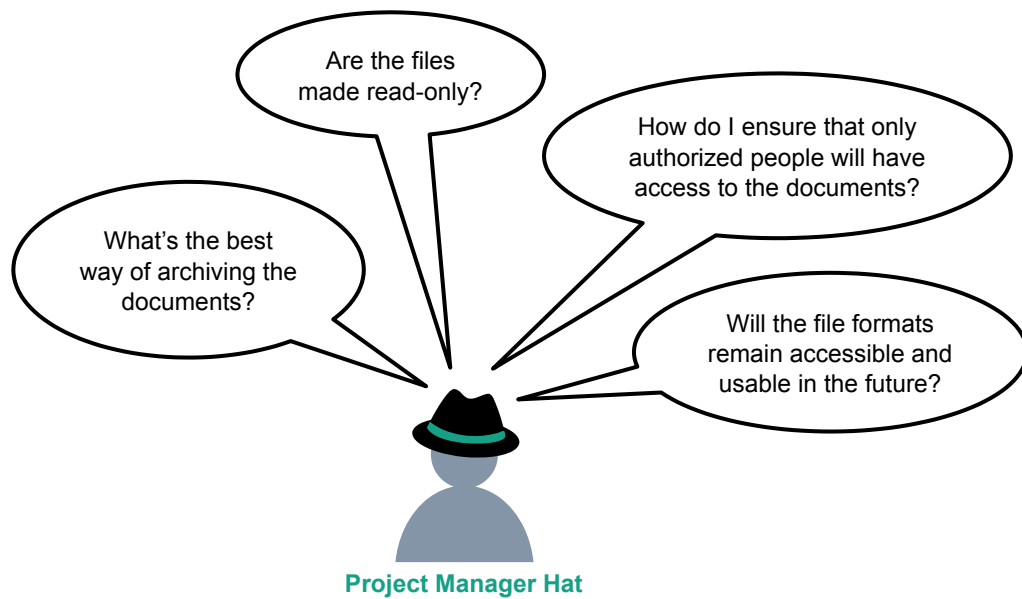




What concerns do you think each hat should have  
in this management activity?

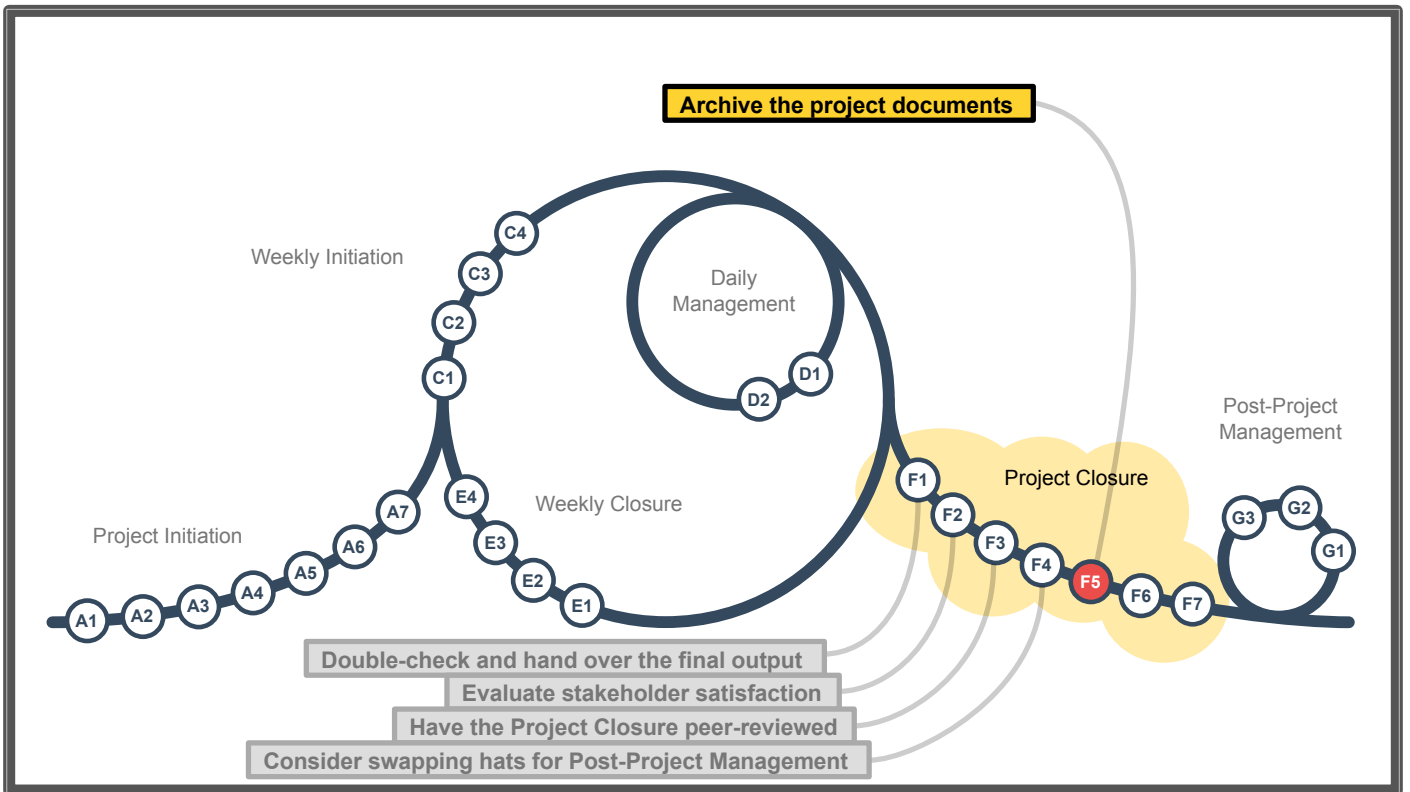


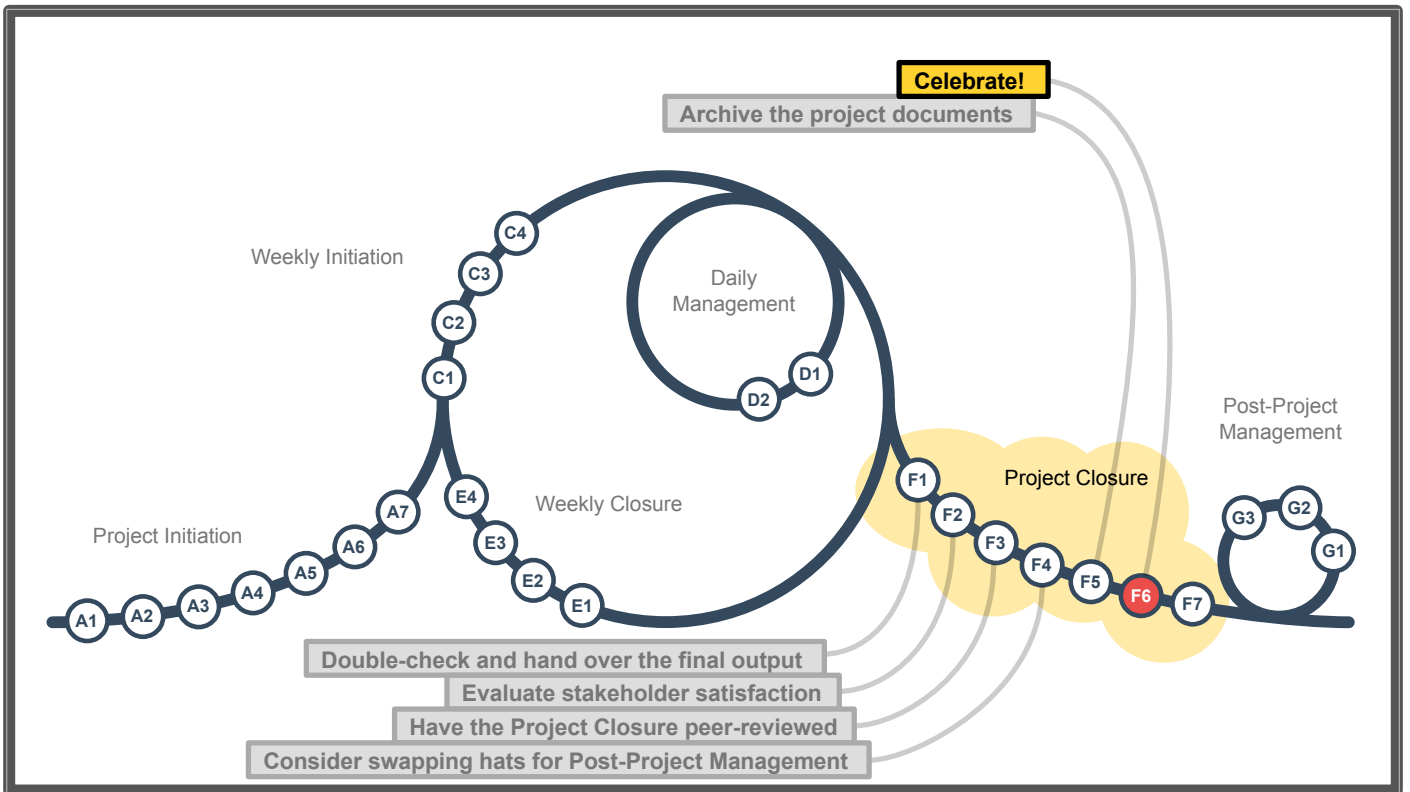


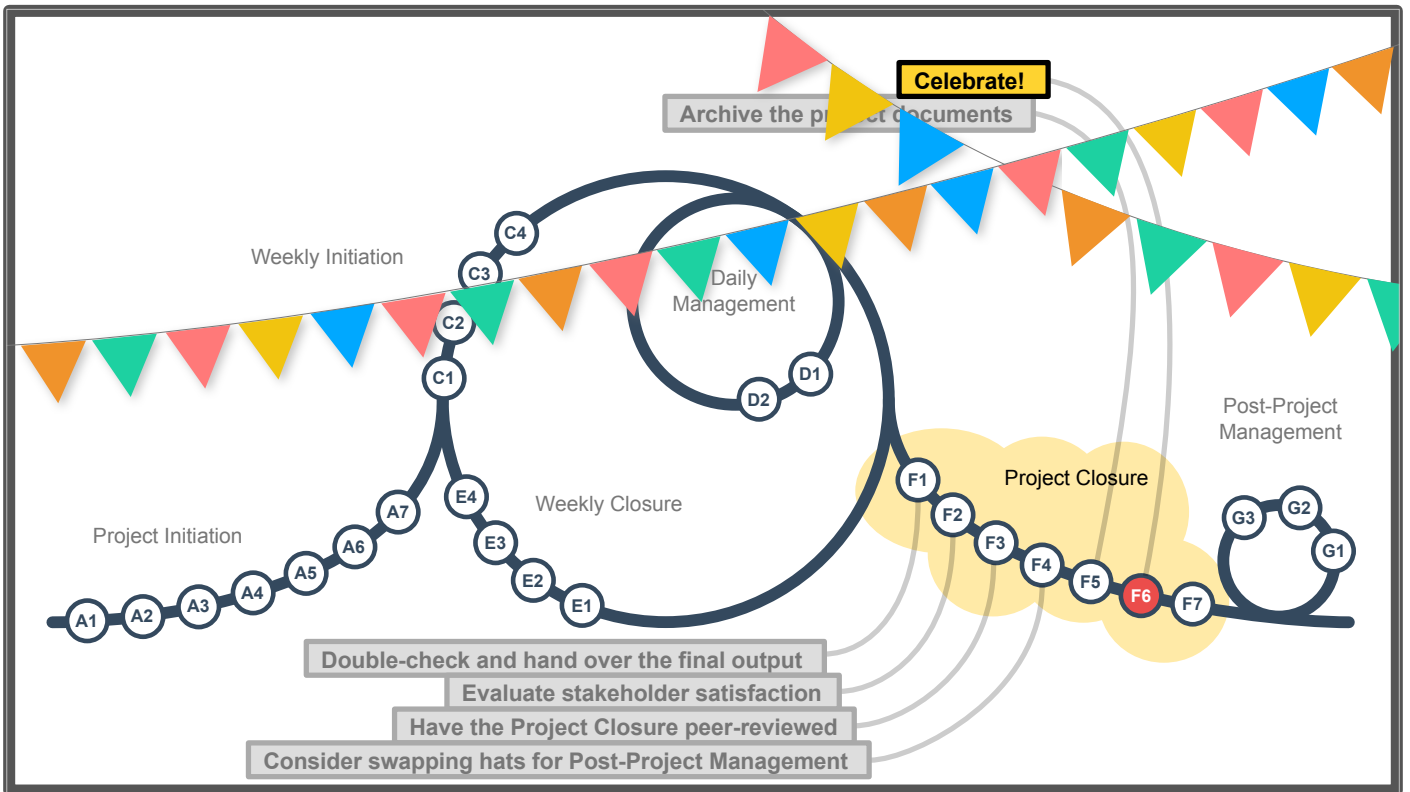


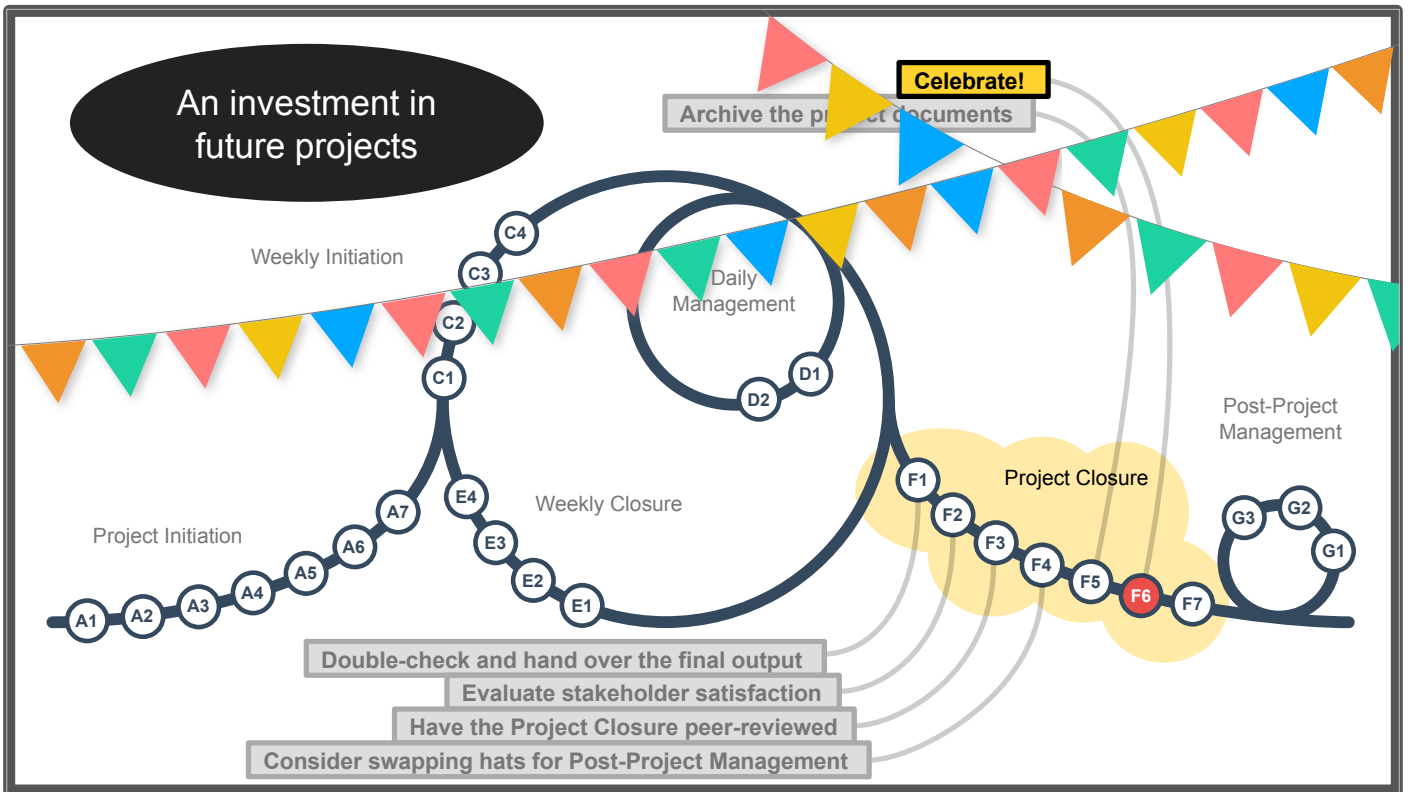
Don't forget to tell them why it's important to archive the documents properly: We want to ensure we can access the information in future projects and won't have to reinvent the wheel every time.

Also, connect this to the usual concern of the Project Manager Hat about having clear documentation.

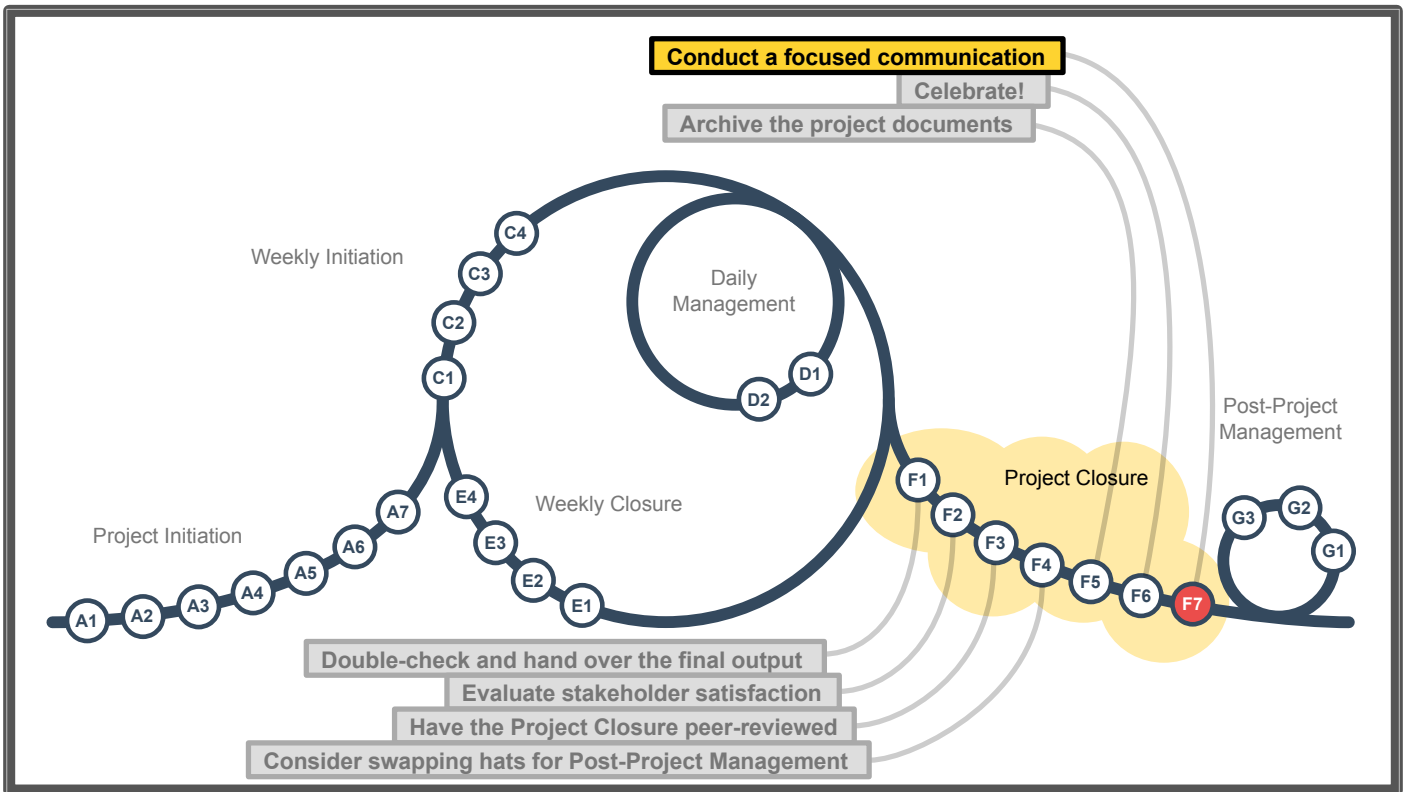




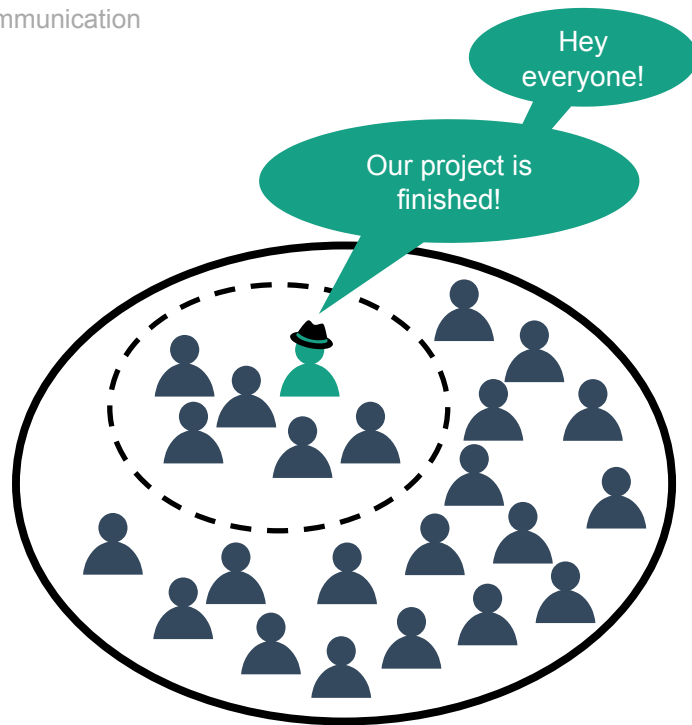




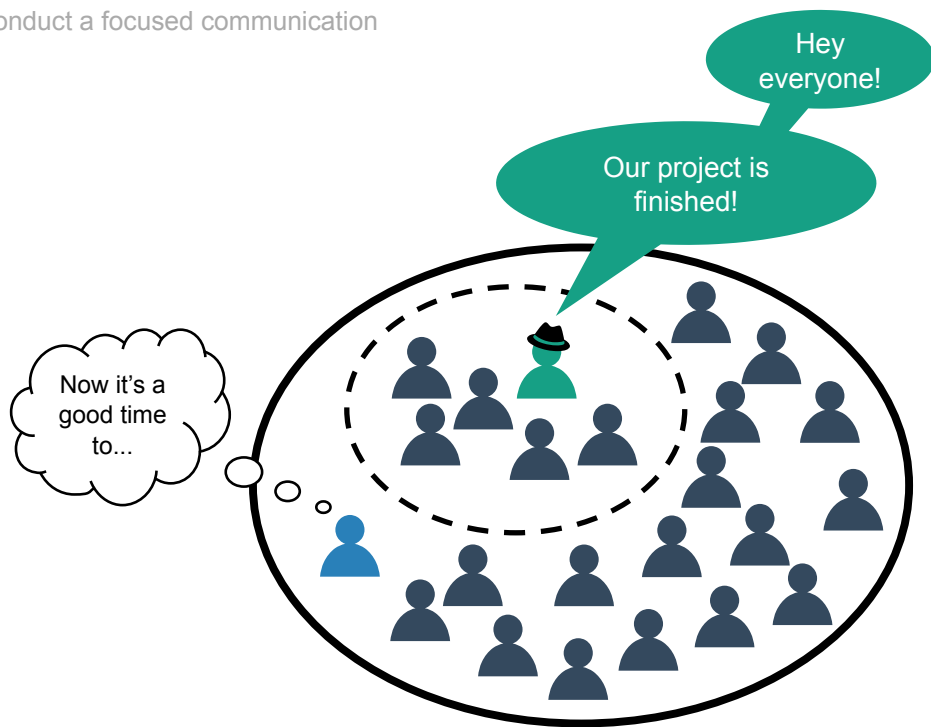
Talk to them about the importance of recognition and the organization's culture on how projects are run.



F7 – Conduct a focused communication

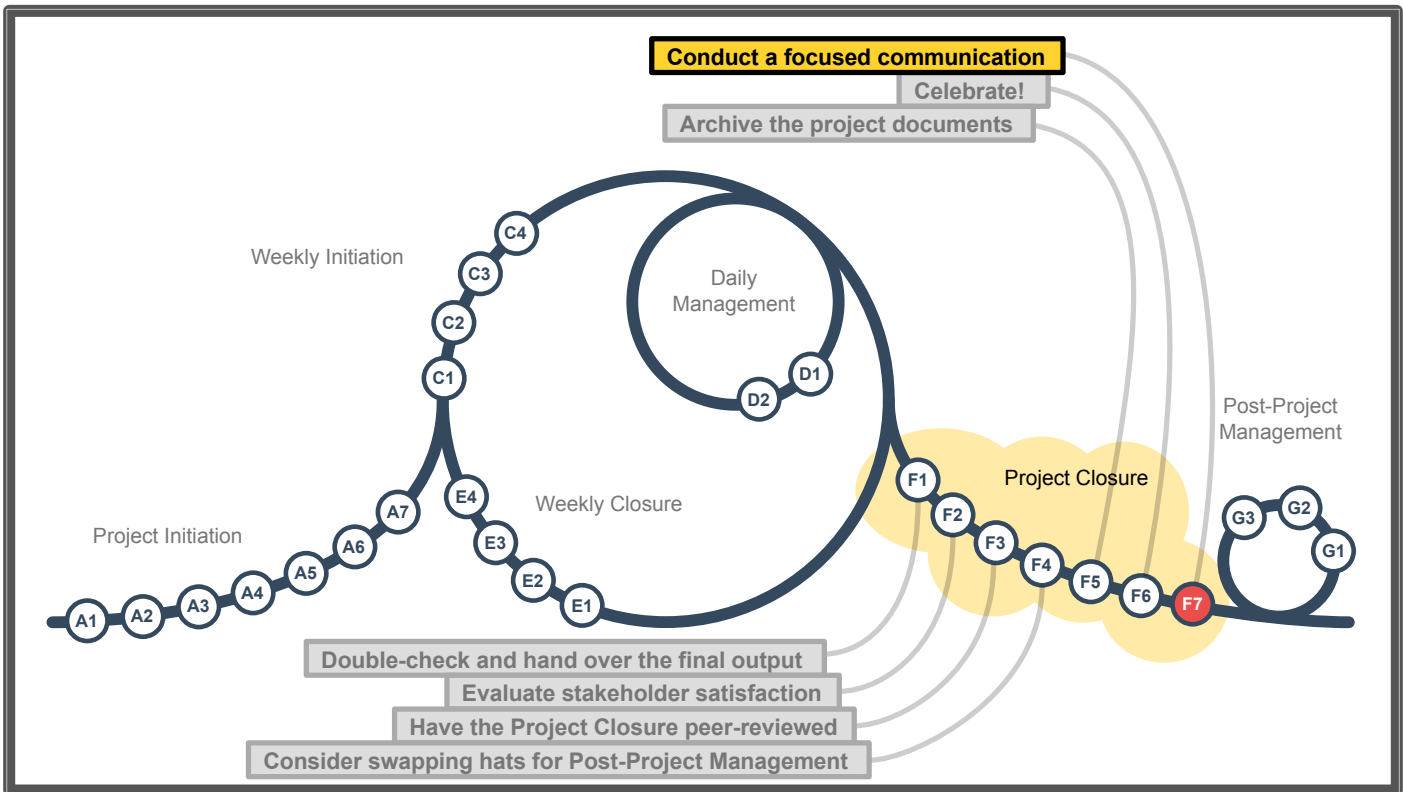


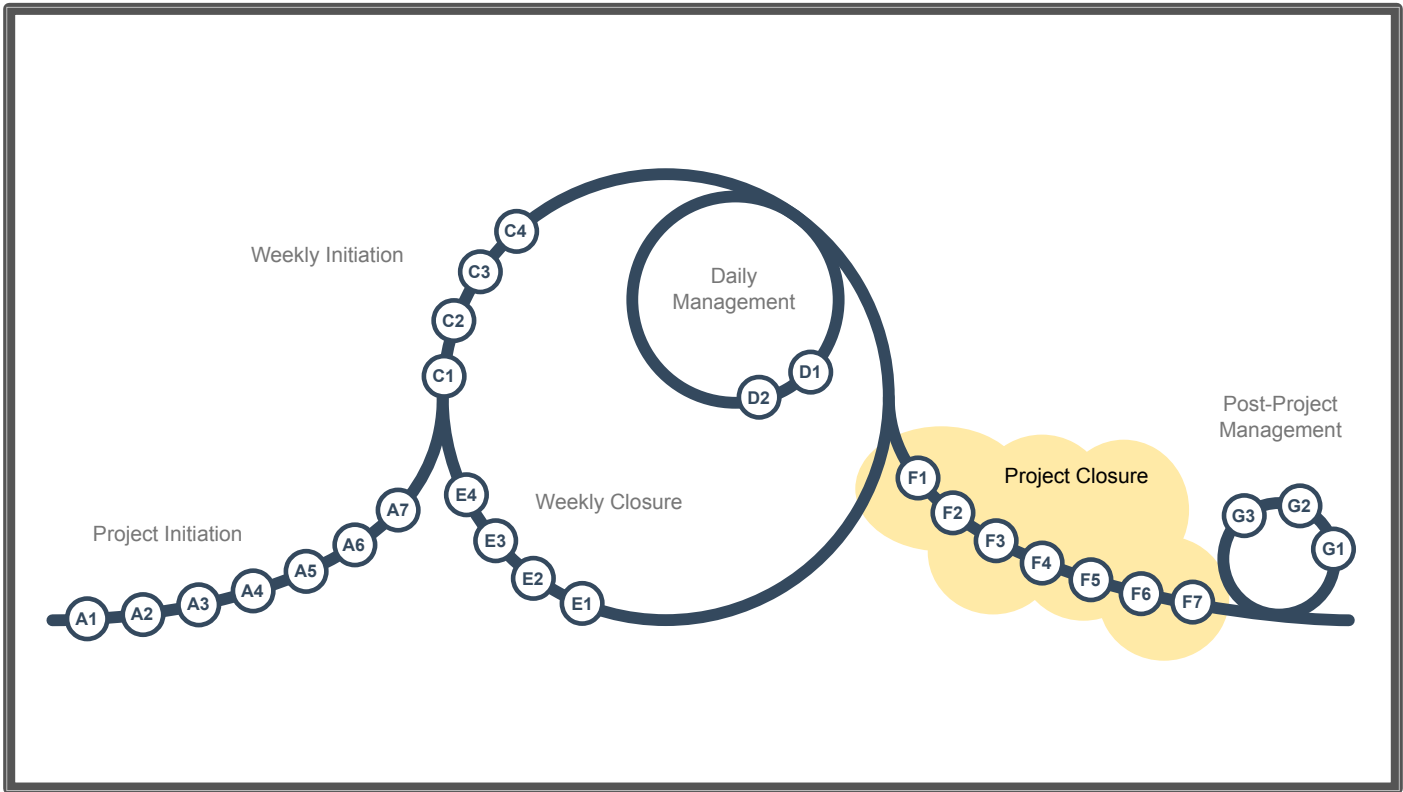
F7 – Conduct a focused communication

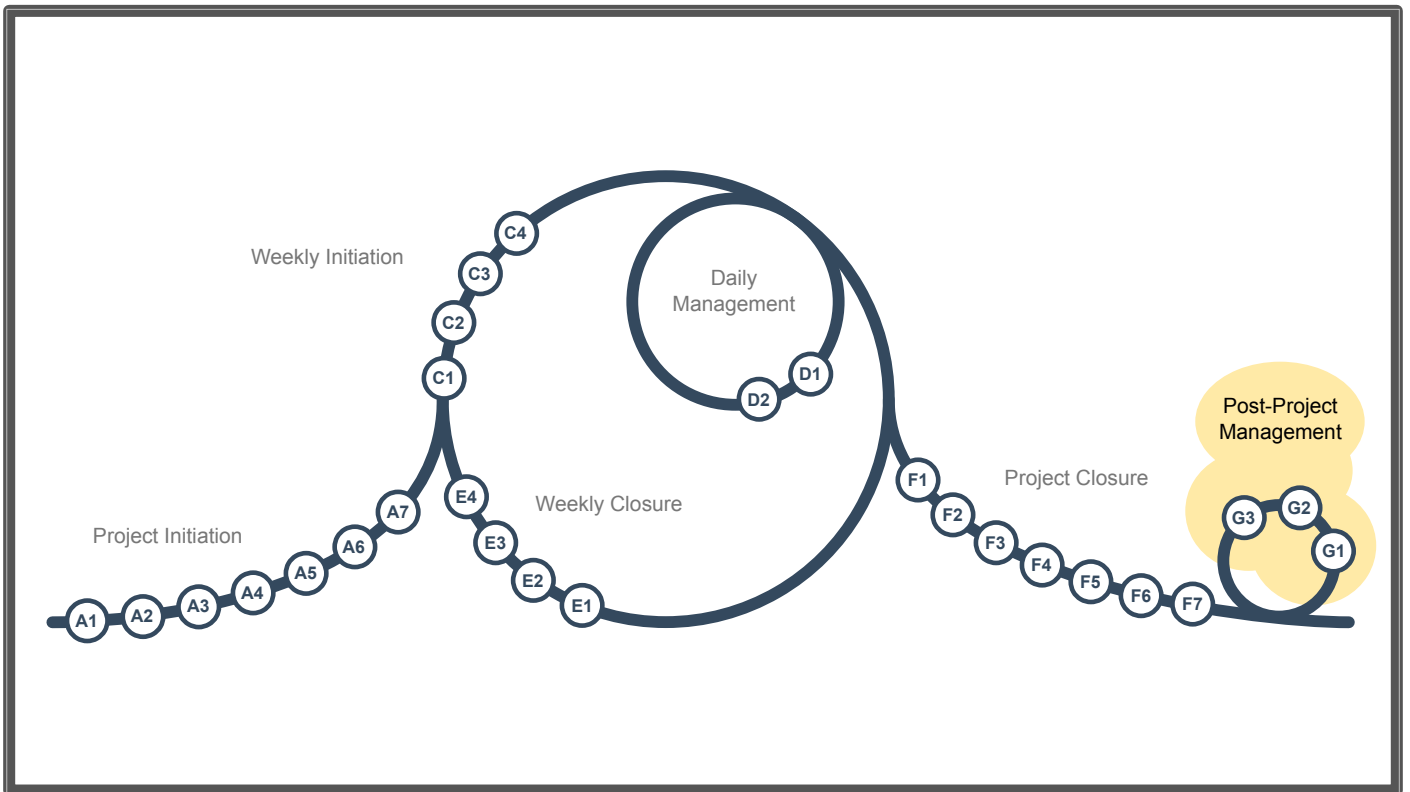


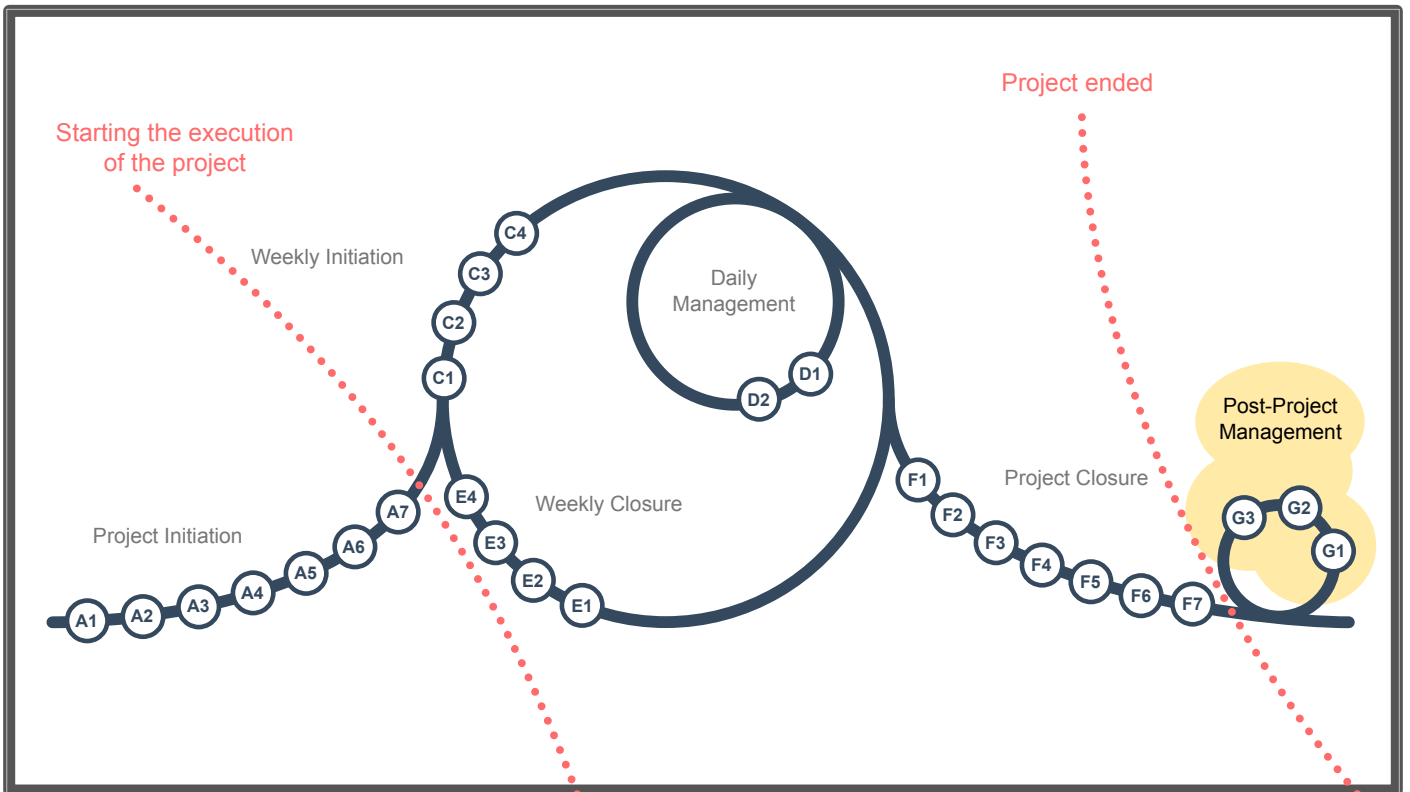
If you like, ask them to share stories about the importance of this focused communication.



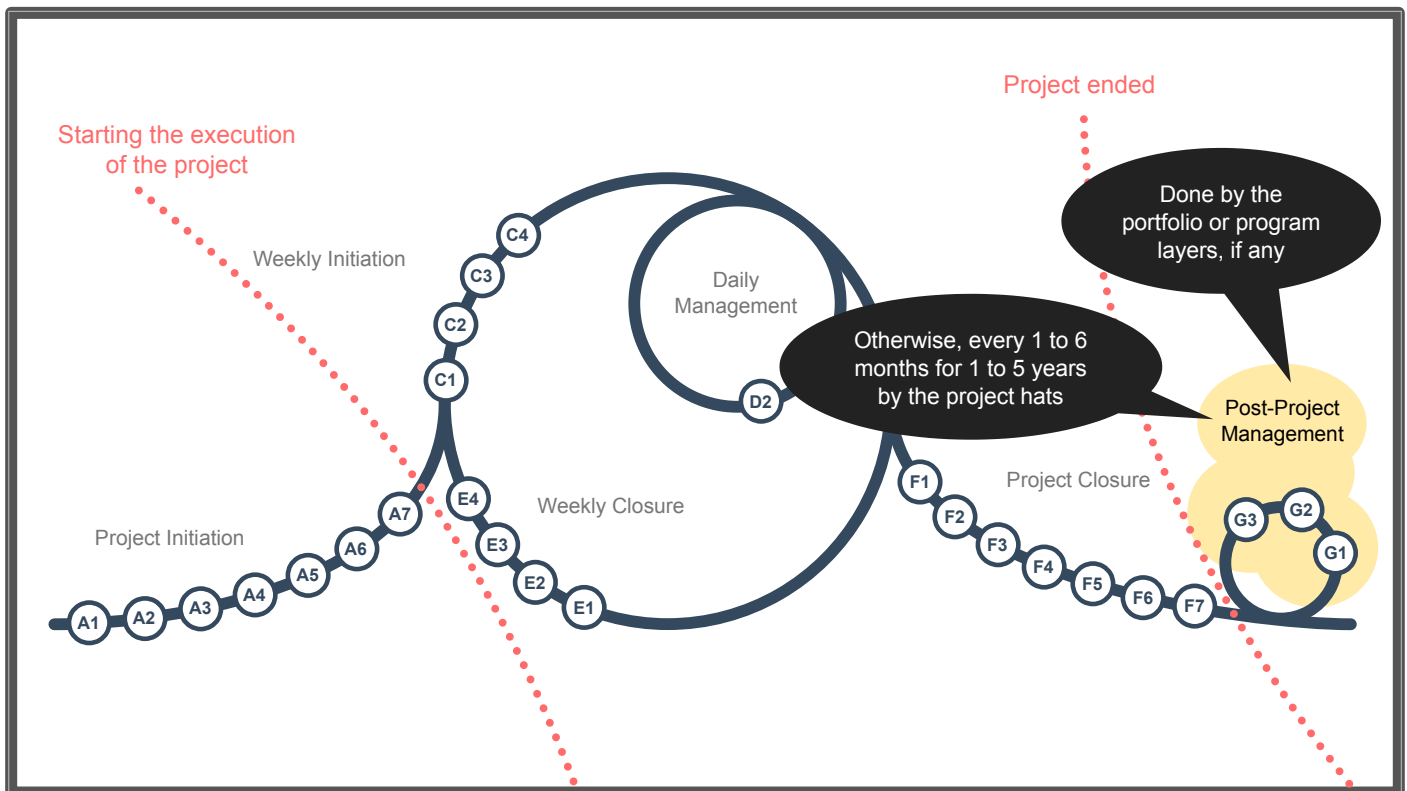






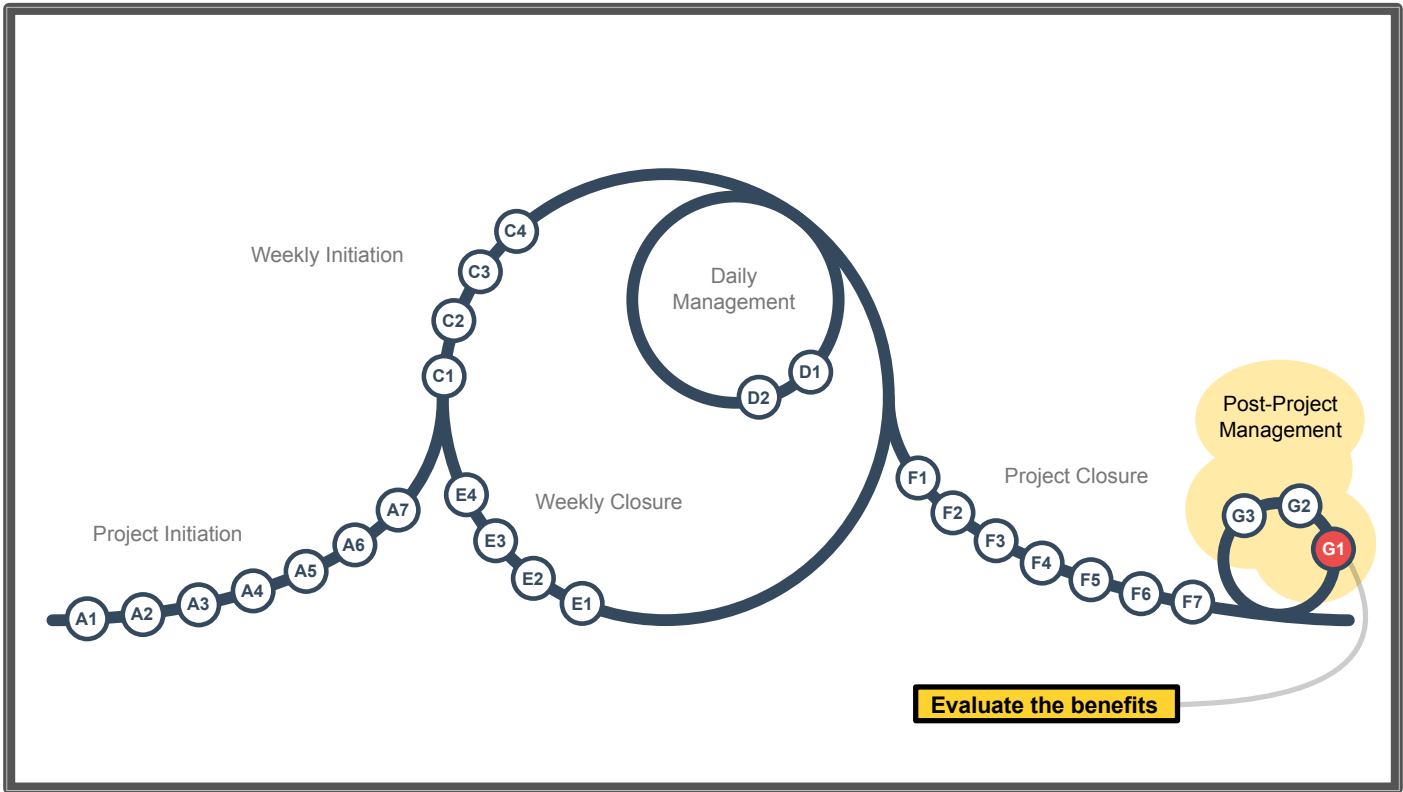


Remind them that the project is finished and closed at the end of Project Closure. Yet, we continue with this Post-Project cycle to make sure we achieve the desired and even extra benefits from the project.



Practically, this cycle is here in case the company has no structured program and portfolio management system.

Note: Benefits management is necessary for all projects, including those done for external stakeholders. When we talk about “benefits”, it’s about our benefits and not those of the external stakeholder, and therefore, we still have to monitor and improve it. For example, when an IT company develops a web application for a customer, they can consider various things: Can we showcase it somewhere and get more exposure? Can we get similar projects now that we have more experience doing it? Etc. In other words, their benefits are not limited to the money they get from the customer, and that’s why they have to continue with the Post-Project Management cycle even after receiving all the money from the customer.

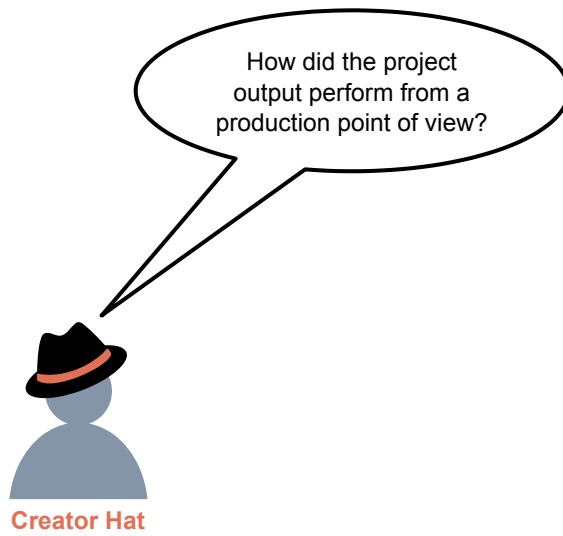


G1 – Evaluate the benefits

How are the users  
using the project's  
output?

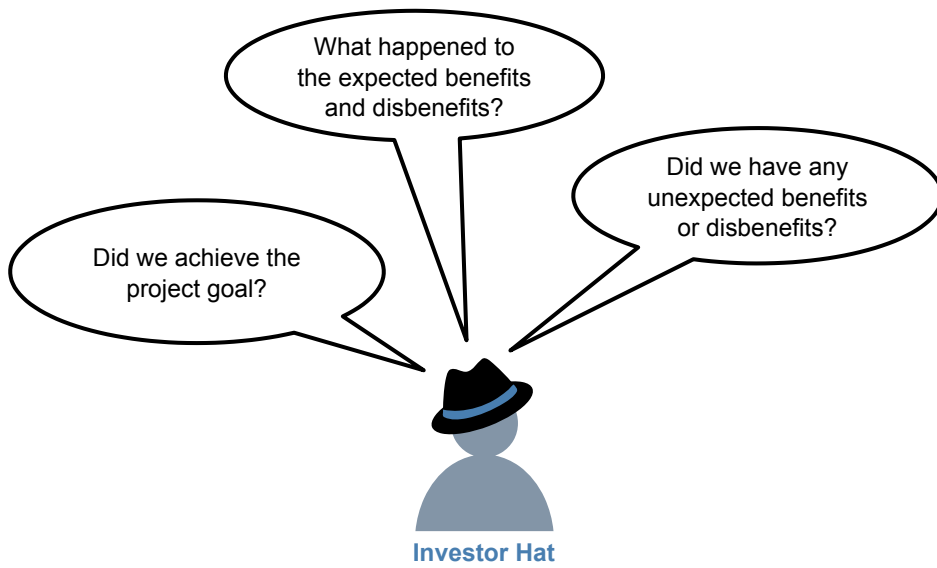


User Hat





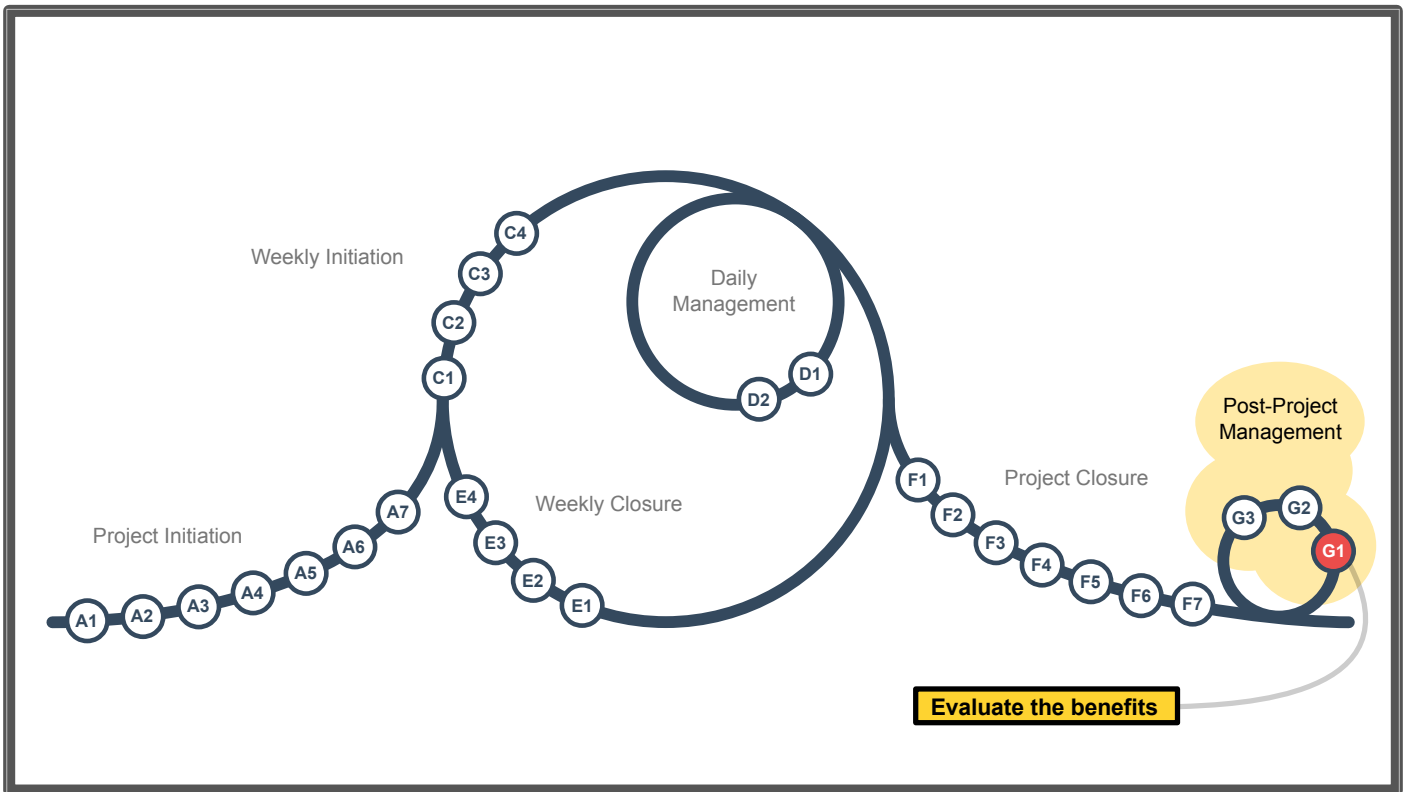
G1 – Evaluate the benefits

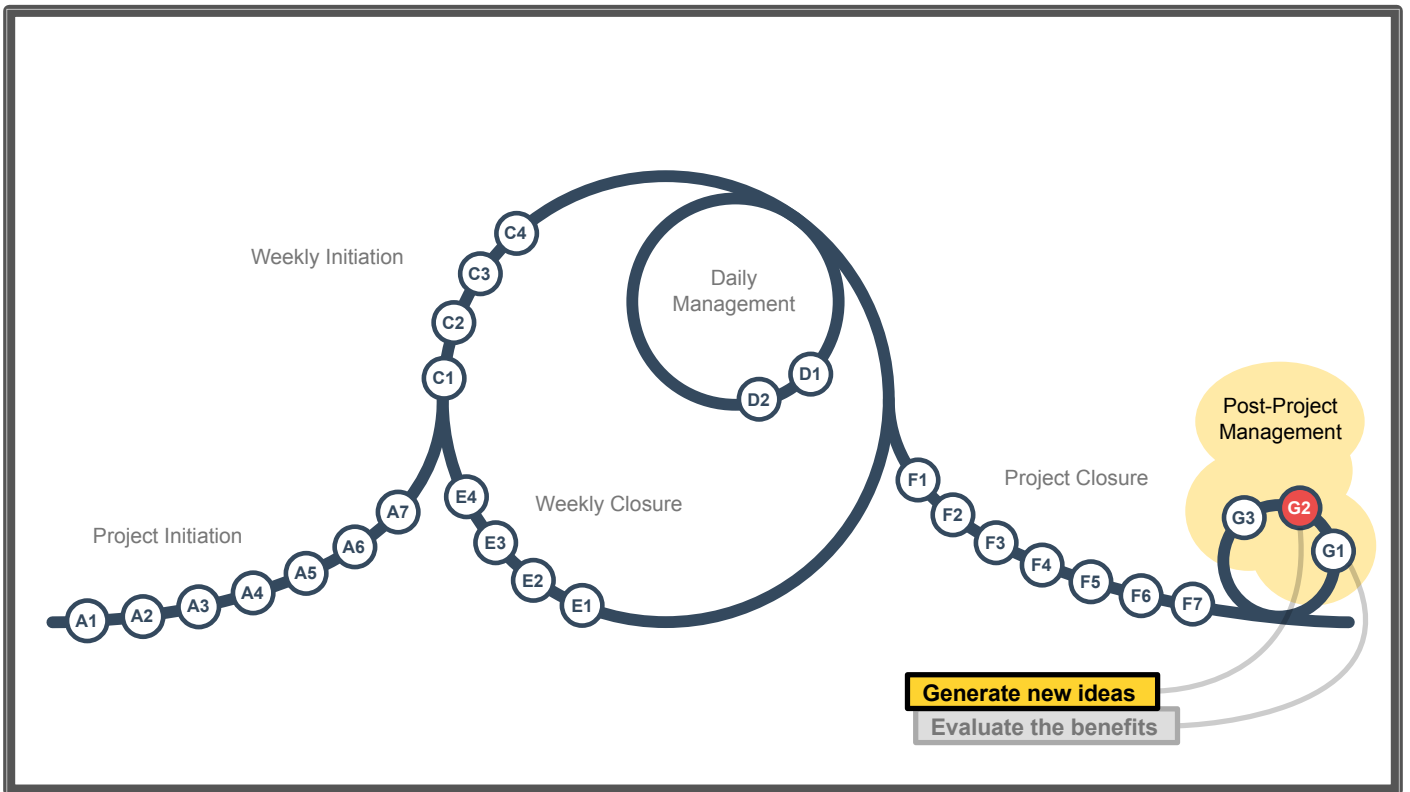


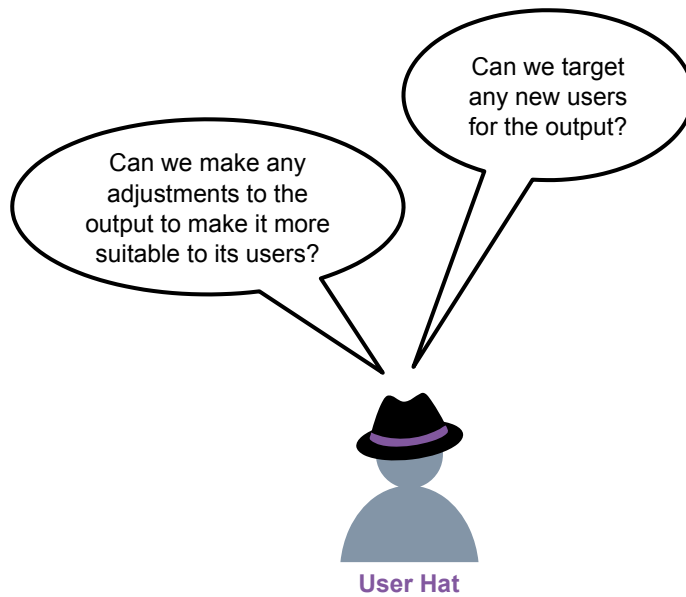
G1 – Evaluate the benefits



Project Manager Hat

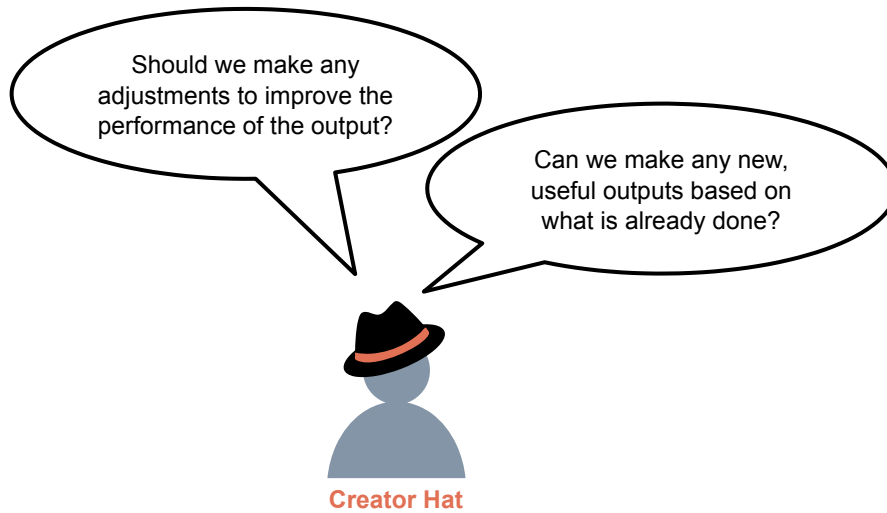






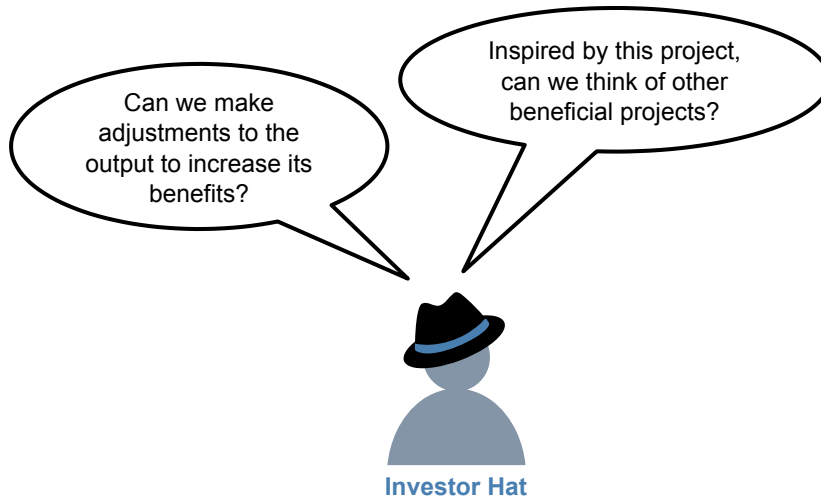
Optionally, ask the audience for examples.

E.g., You've developed an online email platform. Maybe you can have more users if you add a feature for shared inboxes so that small businesses can use it as their CRM system.



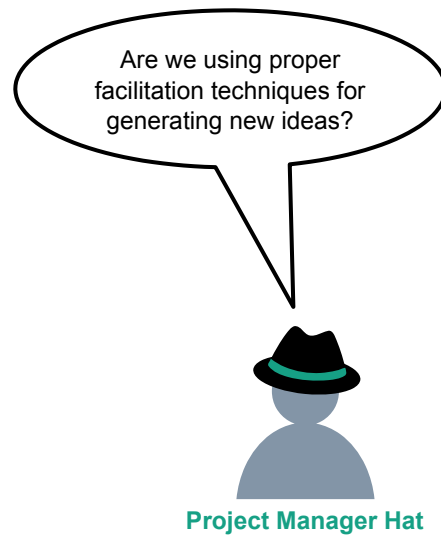
Optionally, ask the audience for examples.

E.g., you've developed an interesting functionality as part of your software application. Maybe you can extract that part and publish it as an open-source library to attract contributors and improve the company's reputation.



Optionally, ask the audience for examples.

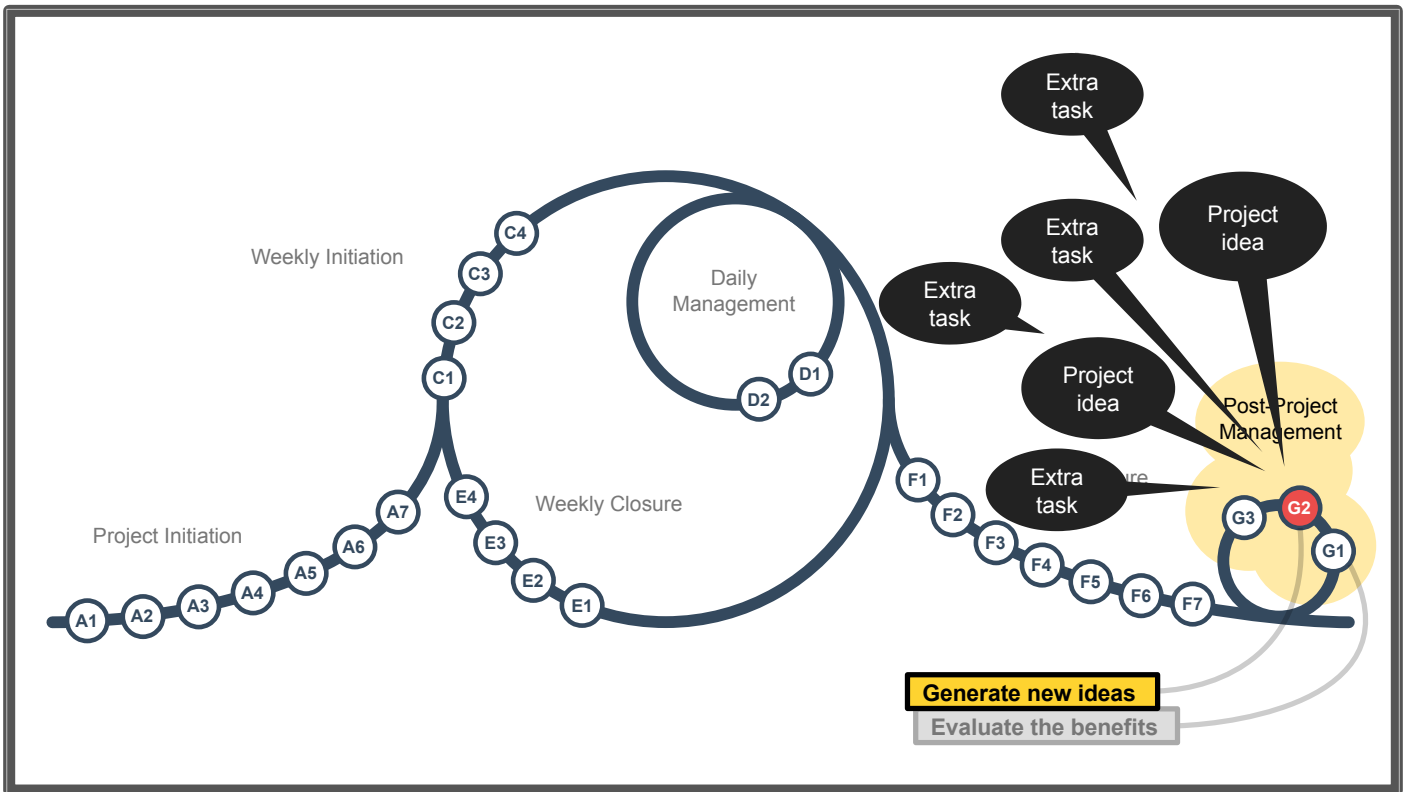
E.g., we've done a project to analyze market demand for the customer. Maybe we can expand it and turn it into a subscription-based service that all similar businesses can use.

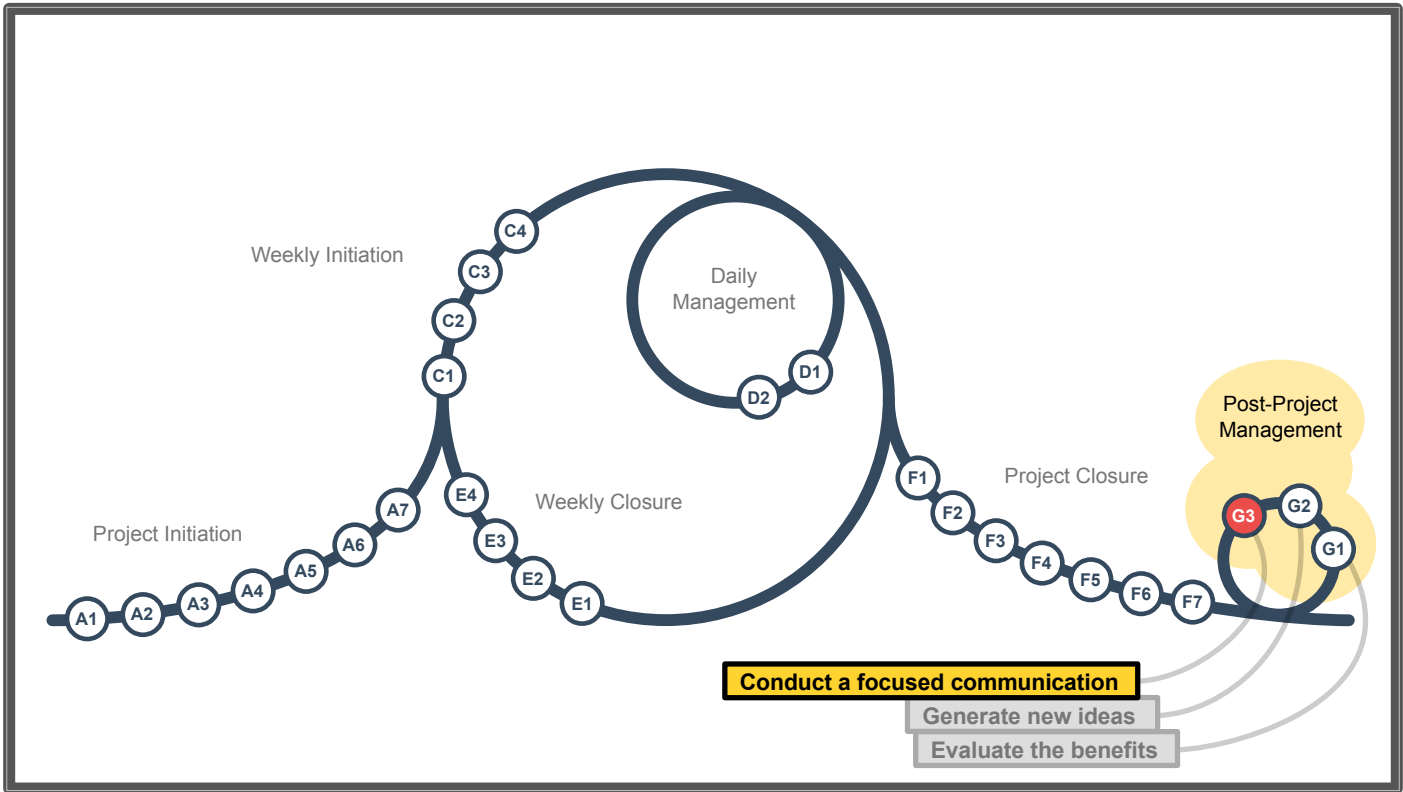


Optionally, ask the audience for examples.

E.g., the Delphi technique (then you have to explain what the technique is, which is a good idea because it can be helpful to everyone.)



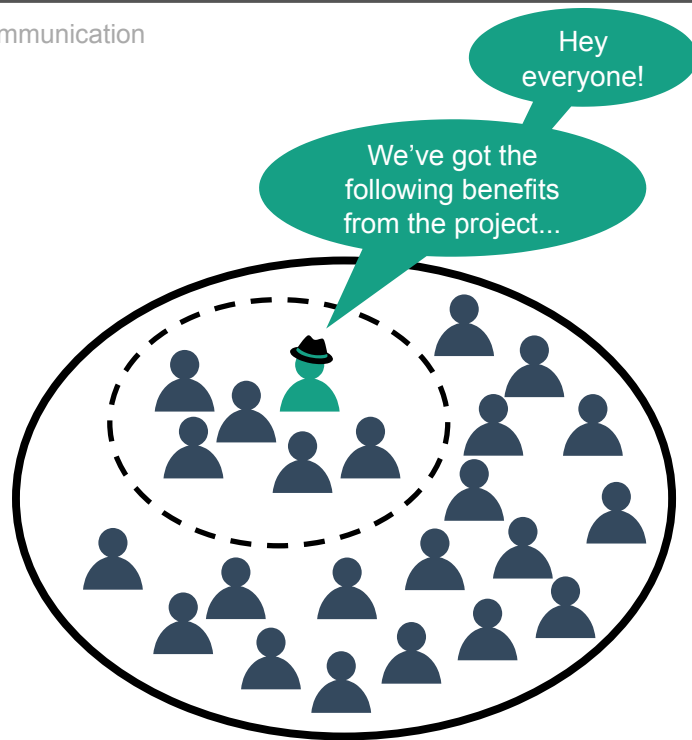




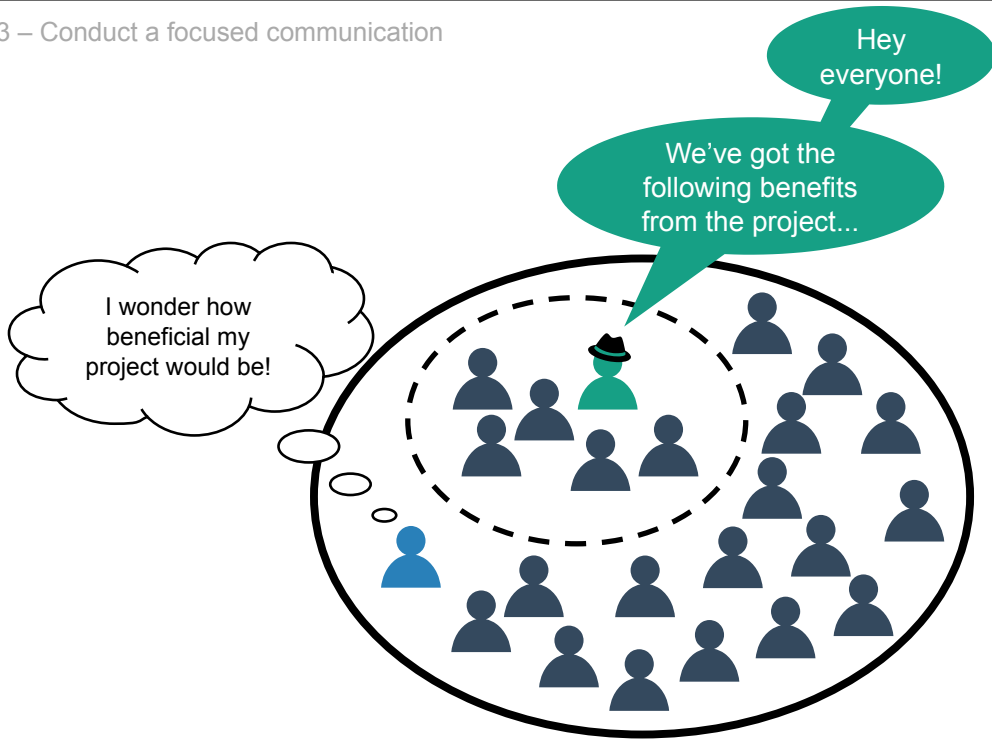
What are the advantages of informing everyone in the organization of the benefits realized from past projects?



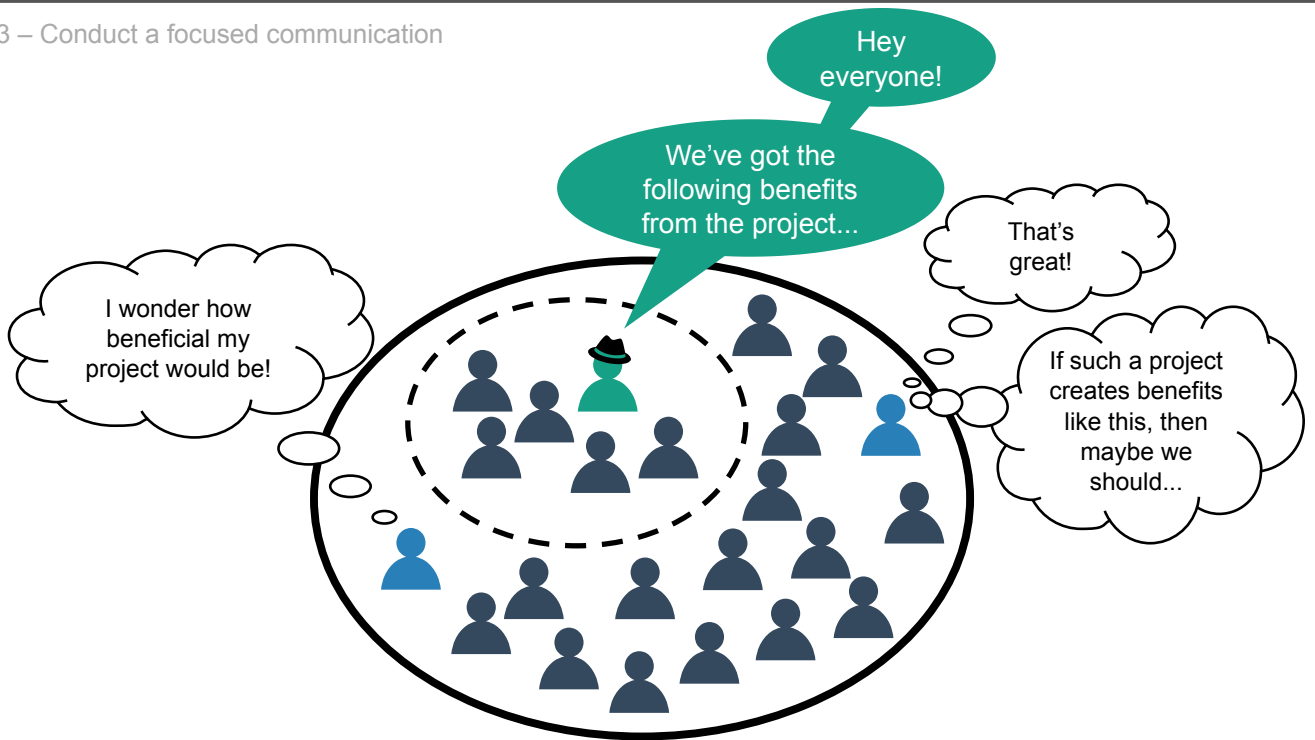
G3 – Conduct a focused communication

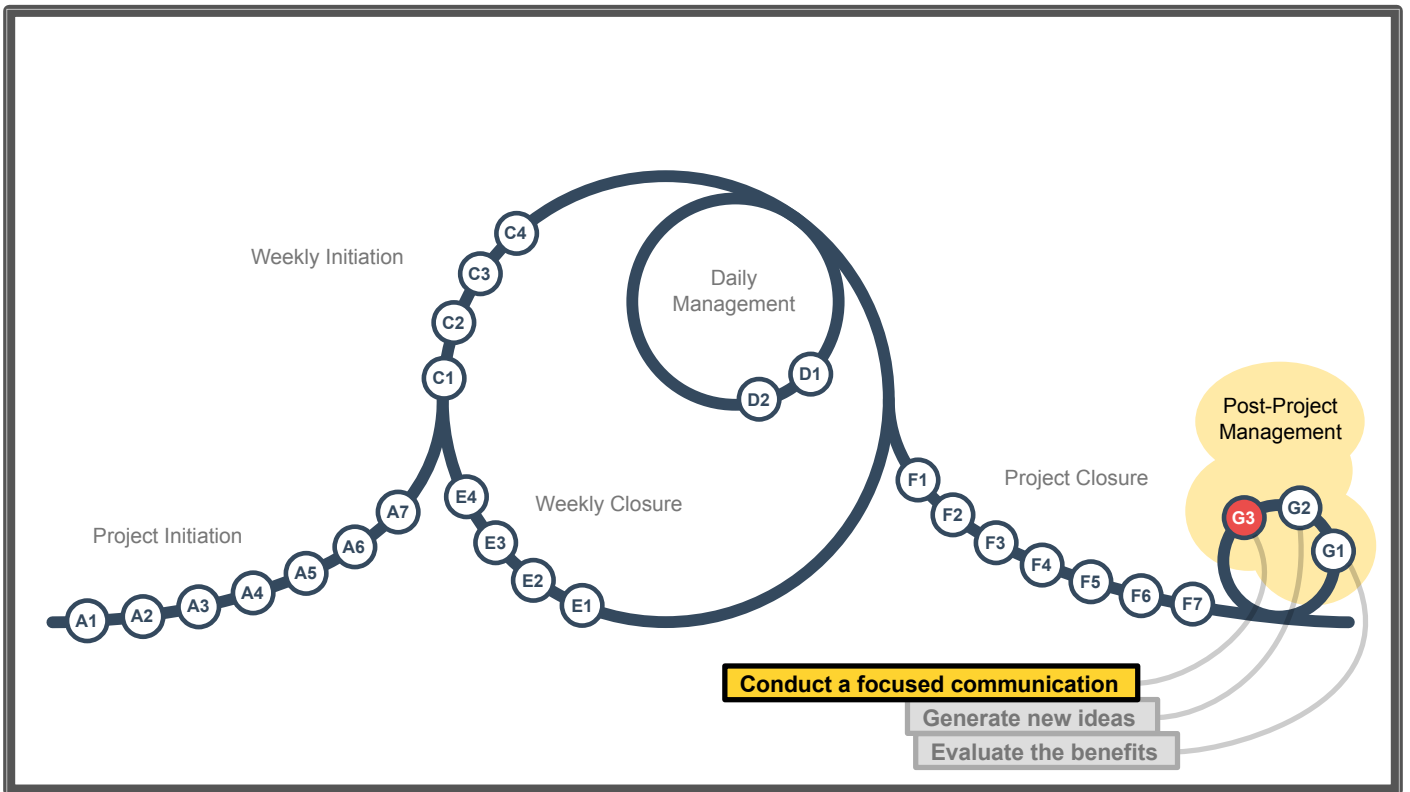


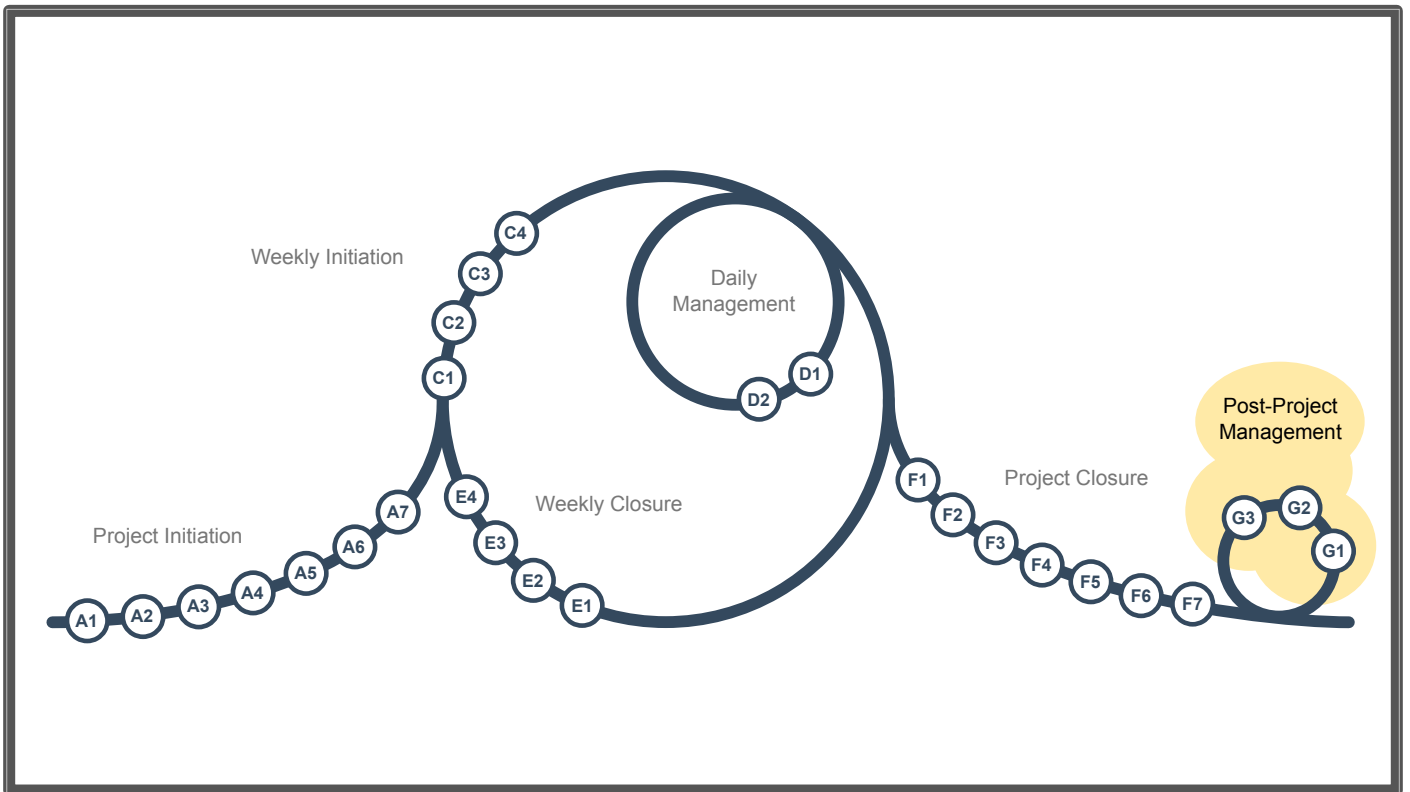
G3 – Conduct a focused communication



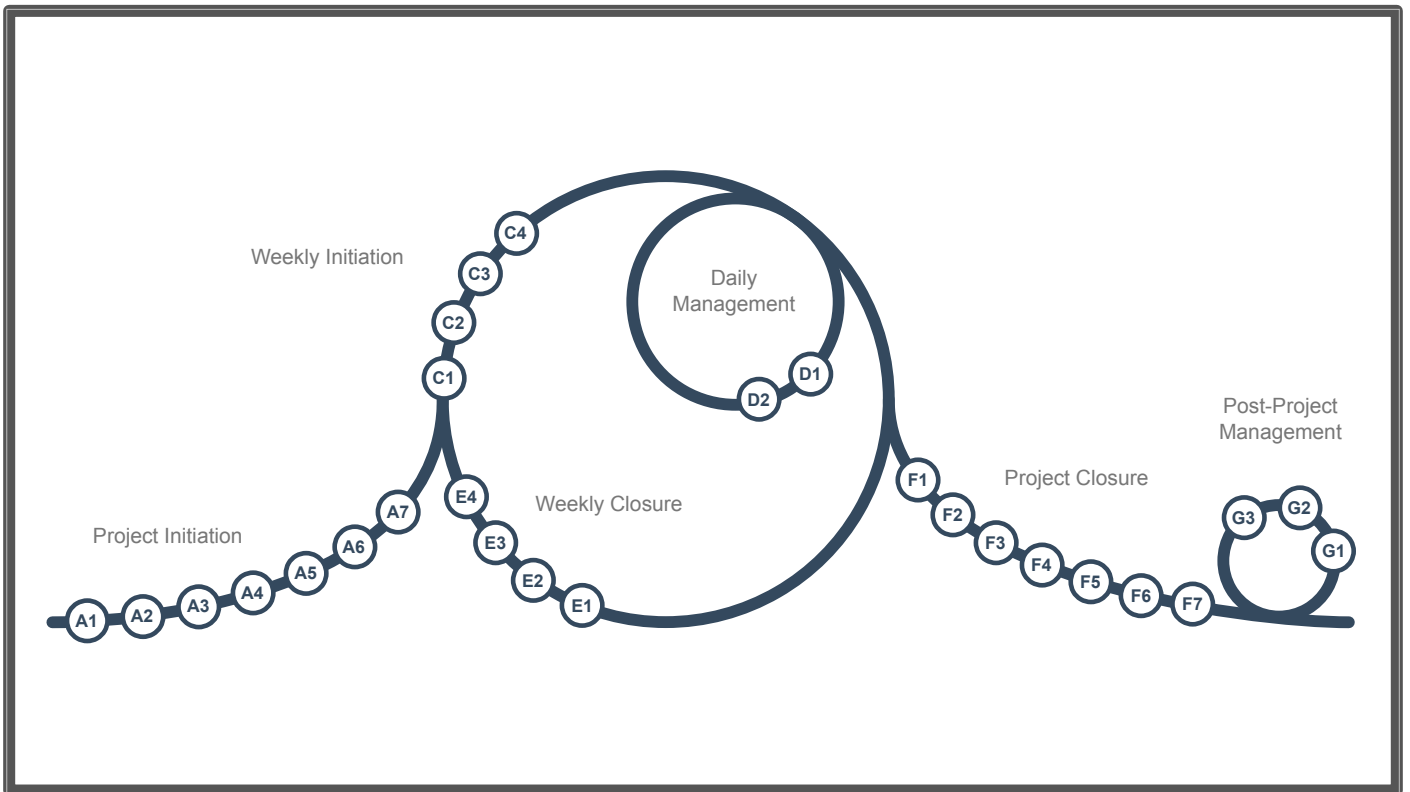
G3 – Conduct a focused communication











① High-level overview

② Full review

 ③ NUPP

④ Tailoring

⑤ Context

⑥ Certification



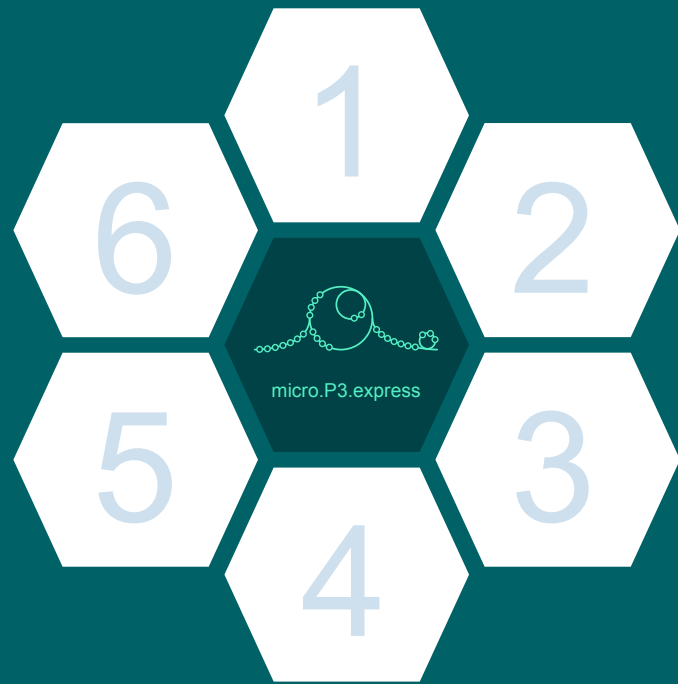
It's up to you to decide how detailed you want this section to be. Some of the NUPP examples are suggested here to be reviewed in the course, but you can add or remove them as you like. More information on each example exists at <https://nupp.guide>

# NUPP

Nearly Universal Principles of Projects

Applicable to

- P3.express
- micro.P3.express
- PRINCE2 PjM
- DSDM
- Scrum
- XP
- PM<sup>2</sup>
- PMBOK Guide
- Etc.



# NUPP

Nearly Universal Principles of Projects

Examples:

- “Agile vs. waterfall”
- Continuous learning
- Openness

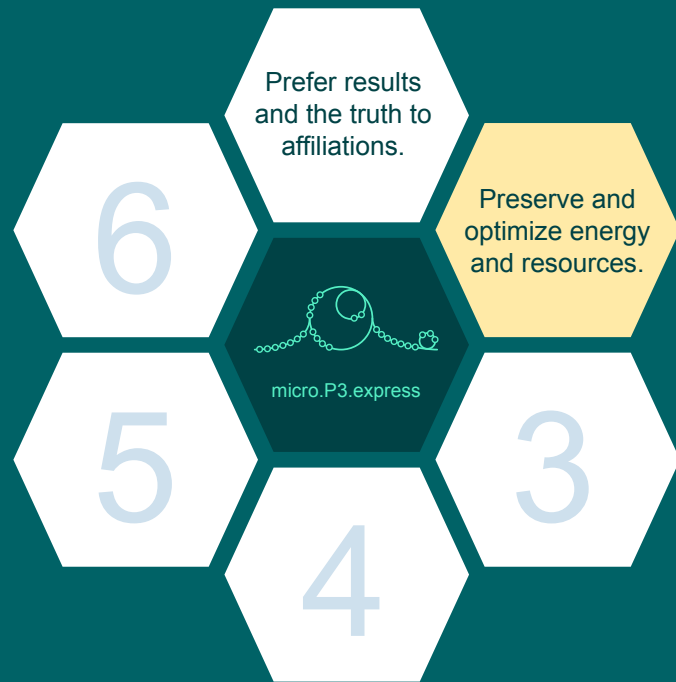


# NUPP

Nearly Universal Principles of Projects

Examples:

- The 80/20 rule
- Decision fatigue
- Etc.



# NUPP

Nearly Universal Principles of Projects

Examples:

- Risk management
- Critical thinking
- Etc.



# NUPP

Nearly Universal Principles of Projects

Examples:

- Deadlines
- Cherry picking
- Etc.





# NUPP

Nearly Universal Principles of Projects

Examples:

- “Business case”
- Simplicity
- Tailoring
- Etc.

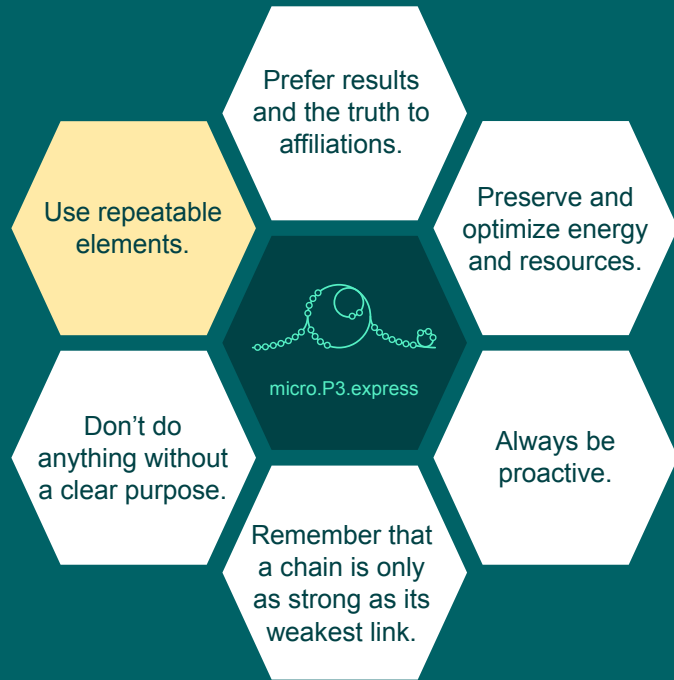


# NUPP

Nearly Universal Principles of Projects

Examples:

- Checklists
- Cycles
- Methods
- Etc.



# NUPP

Nearly Universal Principles of Projects



① High-level overview

② Full review

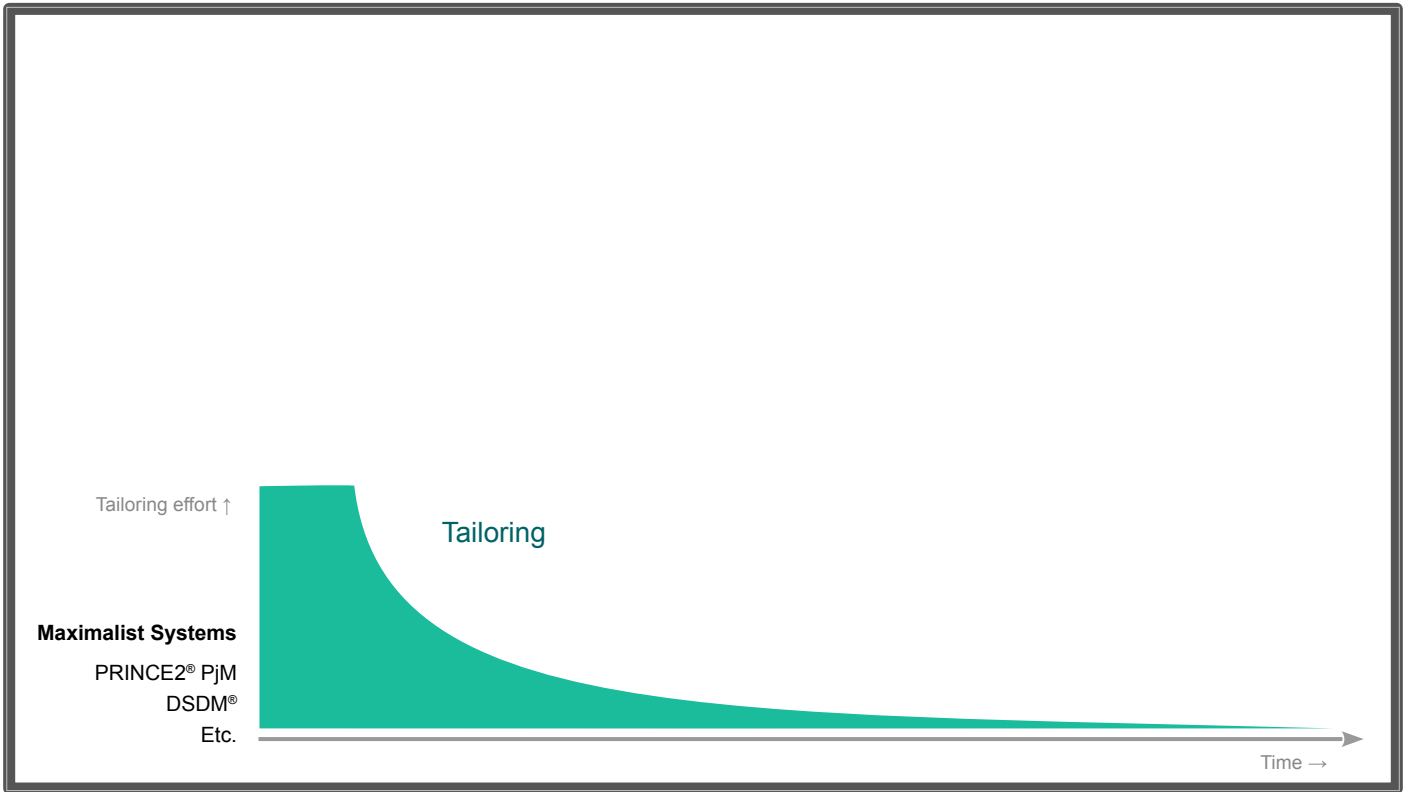
③ NUPP

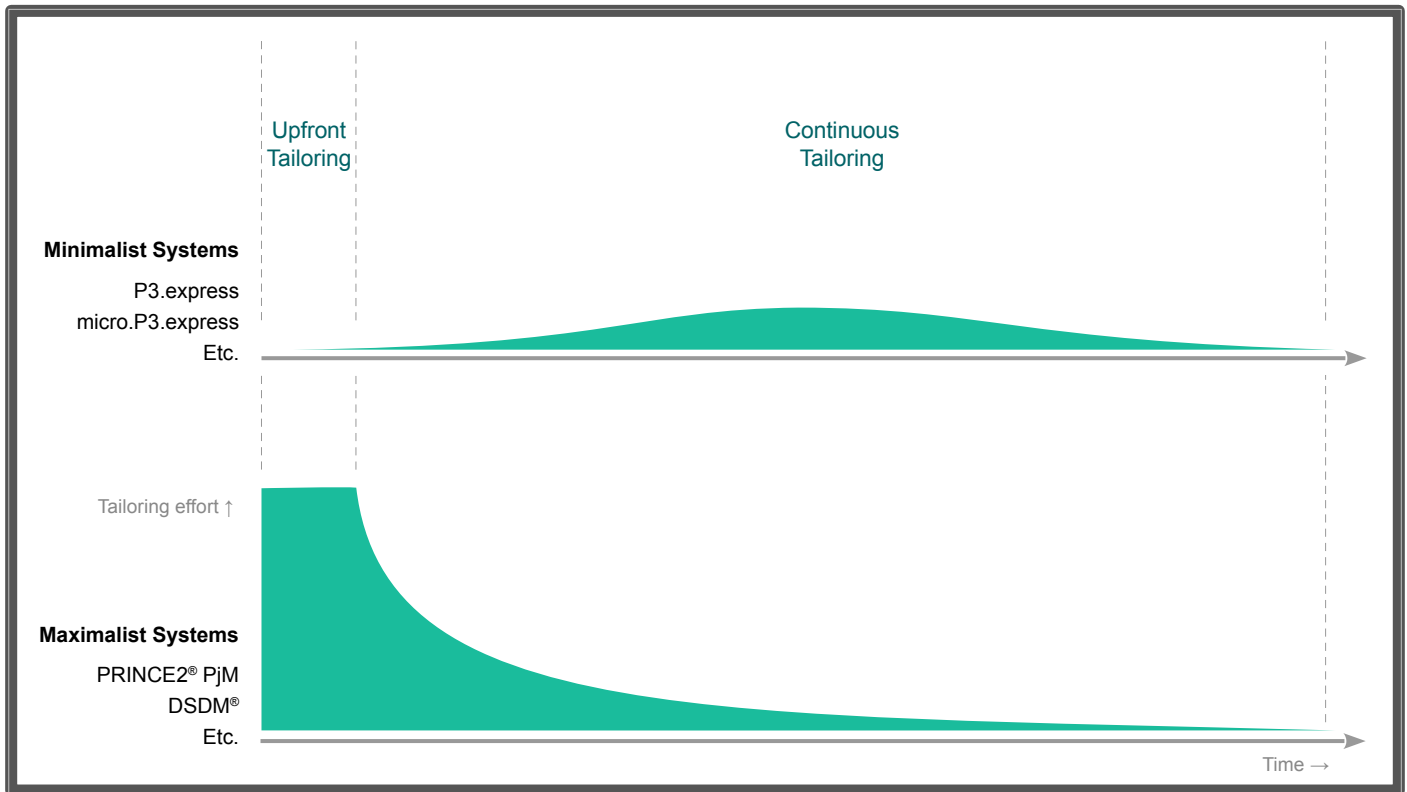
→ ④ Tailoring

⑤ Context

⑥ Certification

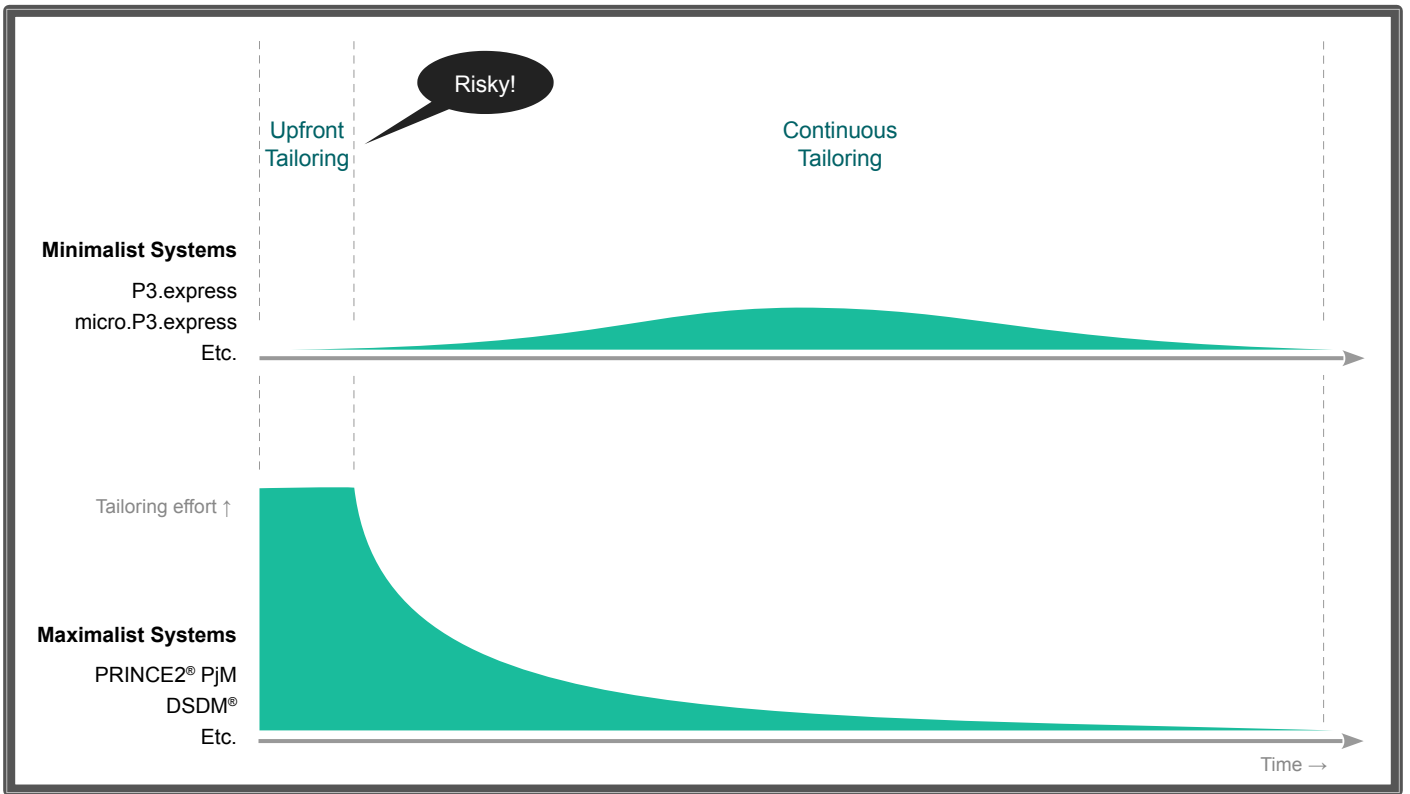
Note that the “context” in  $\mu$ P3P contains more topics than P3P, but they are all less detailed.

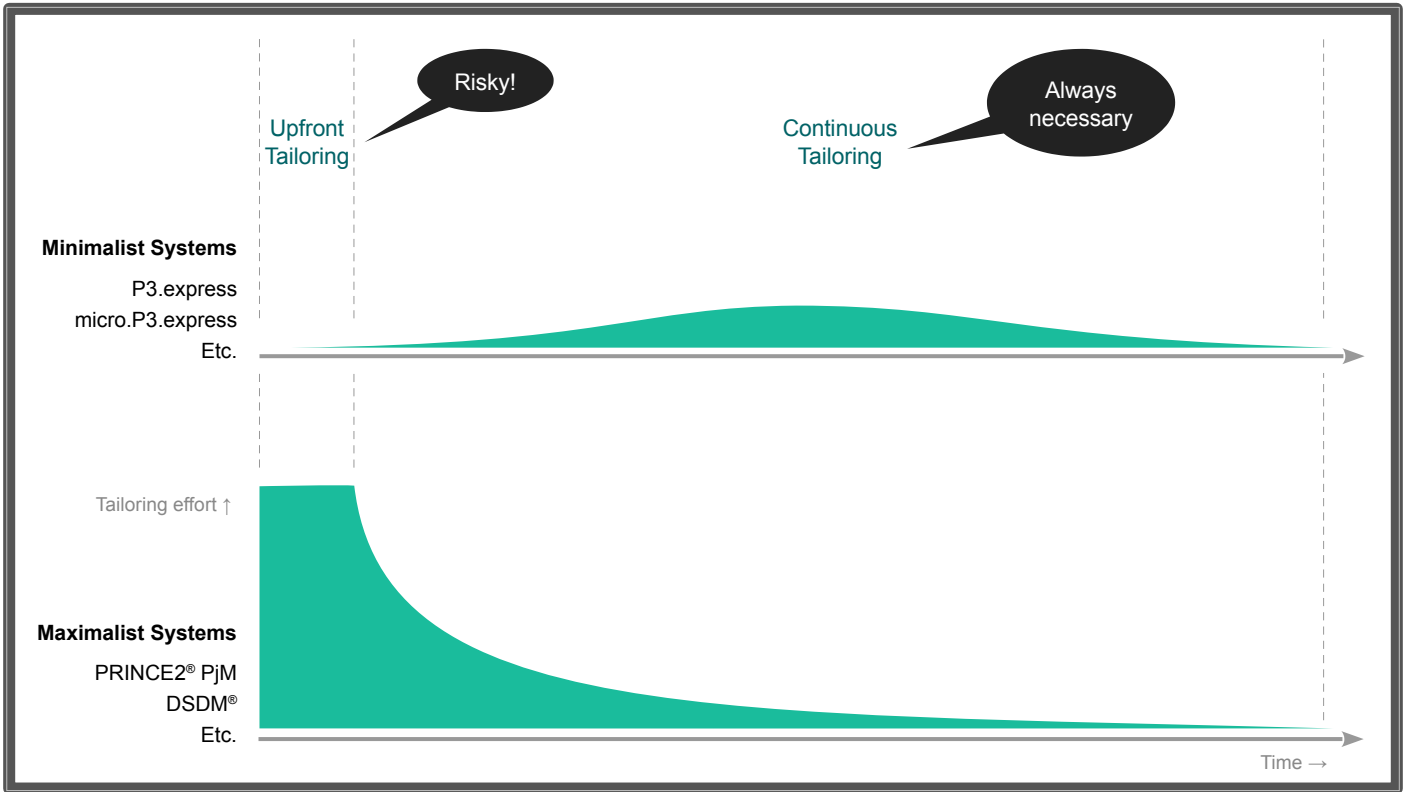




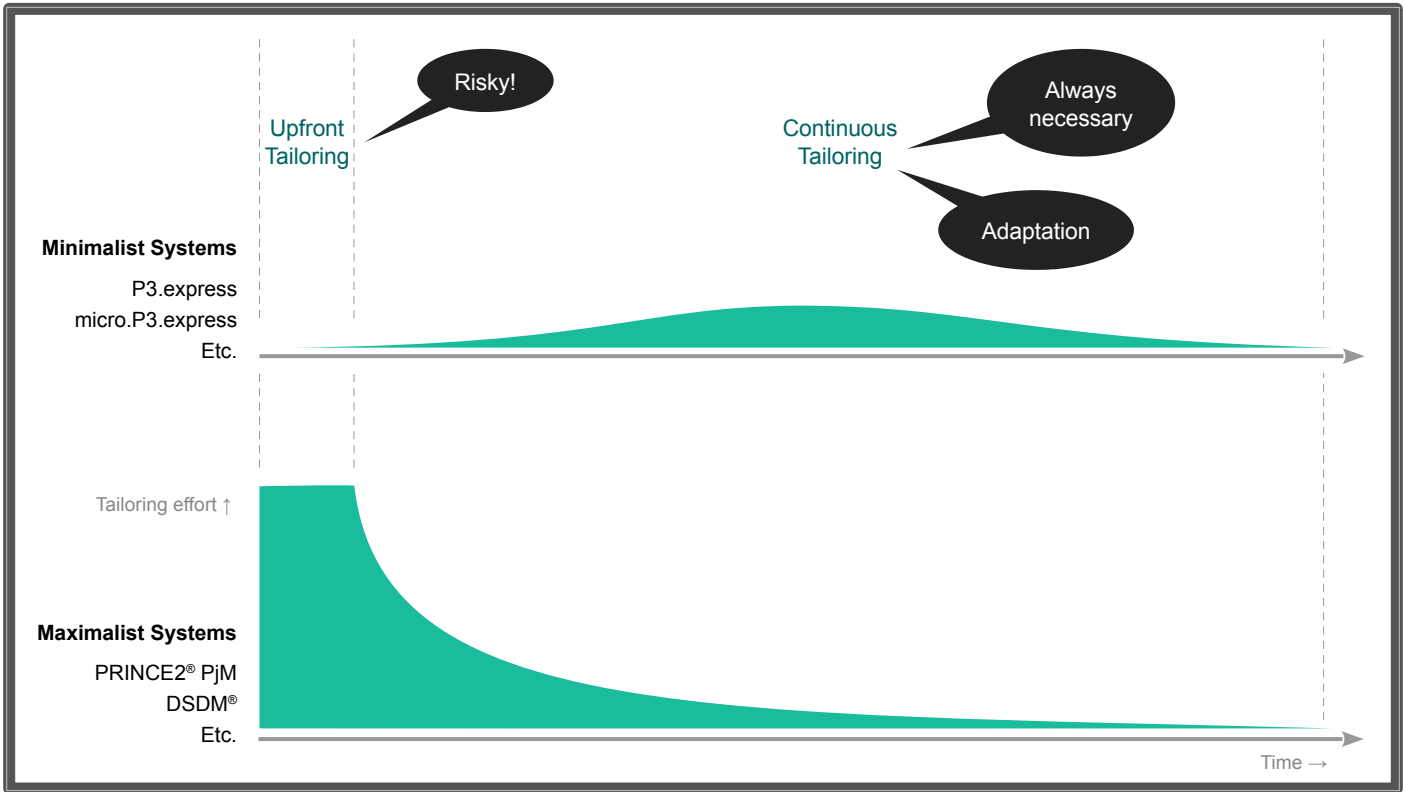
Maximalist systems must have upfront tailoring, whereas minimalist systems don't have to have it, and in fact, it's best not to tailor micro.P3.express upfront.

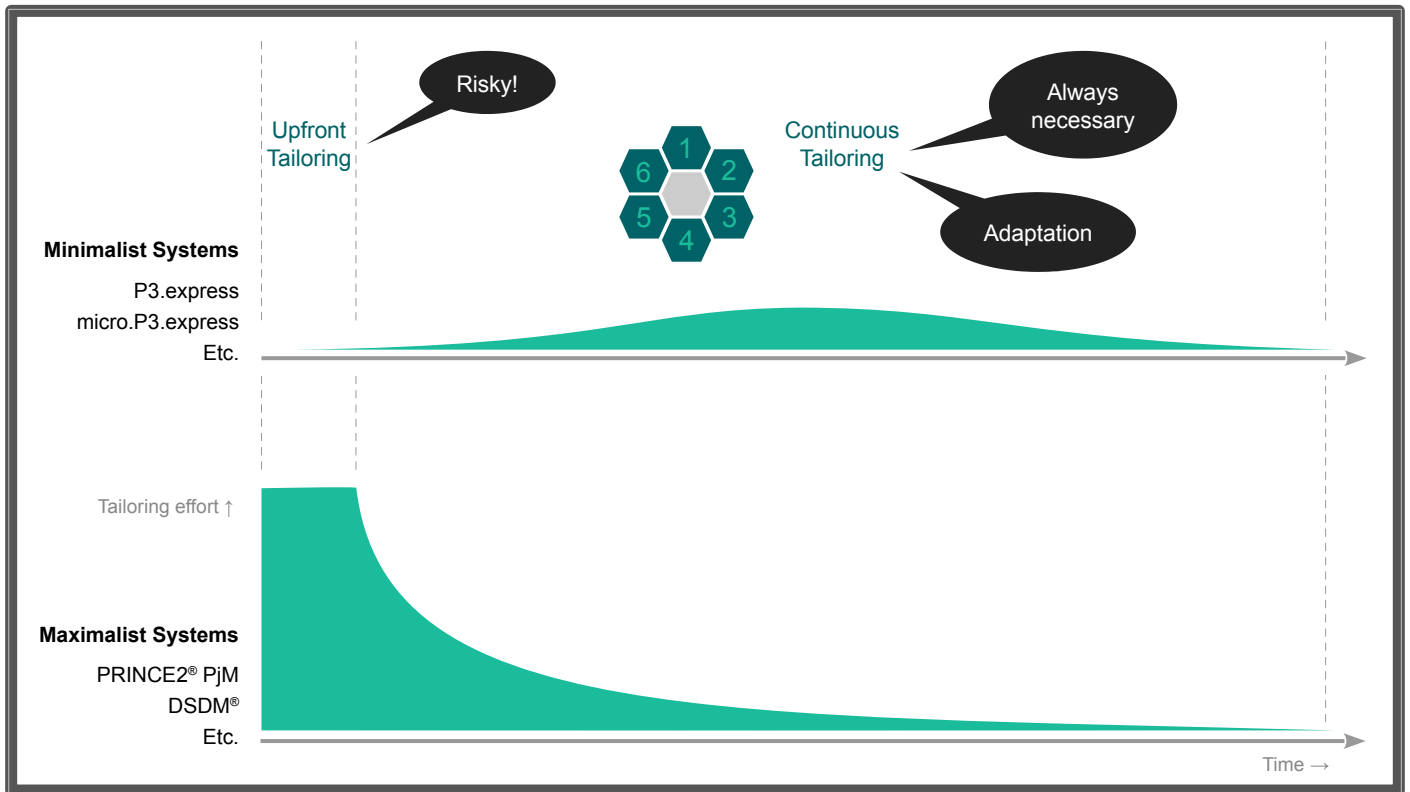
Regardless, both systems should have continuous tailoring to match the project environment.











Everything in micro.P3.express should be interpreted using NUPP. This is more important when the system is being tailored.

- ① High-level overview

- ② Full review

- ③ NUPP

- ④ Tailoring

- ⑤ Context

- ⑥ Certification

Note that the “context” in  $\mu$ P3P contains more topics than P3P, but they are all less detailed.



## **OMIMO's Vision**

A vision statement describes the future state we want to have.



## OMIMO's Vision

We envision a future where *our target projects*<sup>(1)</sup>

- are run efficiently,
- fulfill their purposes, and
- leave a positive social and ethical footprint.

This vision is desirable to us because improving projects helps improve our world.

Note that many organizations have visions such as “we will be the number one project management organization in the world”. Such visions are selfish and more suitable for a commercial entity rather than one that wants to see the world become a better place.



## **OMIMO's Mission**

The mission statement is one that describes what we want to do to help realize the vision.



## OMIMO's Mission

To achieve our vision, we develop and maintain management modules for the *project ecosystem*<sup>(2)</sup>. The modules must be realistic, yet ambitious, but not idealistic. They must have the fundamental OMIMO attributes:

- *Open*<sup>(3)</sup>
- *Minimalist*<sup>(4)</sup>
- *Modular*<sup>(5)</sup>

The supporting context of the modules should

- be driven by voluntary community contributions rather than commercial transactions, and
- comply with the General Code of Conduct.



## **General Code of Conduct**

OMIMO's Vision and Mission comes with a General Code of Conduct, as those three elements are truly integrated and make sense together. The General Code of Conduct is applicable to 1) any individual who contributes to OMIMO, 2) any groups of individuals who contribute to OMIMO, and 3) OMIMO as a whole.





**General  
Code of Conduct**

- 1
- 2
- 3



## General Code of Conduct

- 1 We respect human freedom and avoid discriminatory speech or actions.
- 2
- 3



## General Code of Conduct

- 1 We respect human freedom and avoid discriminatory speech or actions.
- 2 We remain open yet critical when engaging with topics in the *project ecosystem*<sup>(2)</sup>.
- 3



## General Code of Conduct

- 1 We respect human freedom and avoid discriminatory speech or actions.
- 2 We remain open yet critical when engaging with topics in the *project ecosystem*<sup>(2)</sup>.
- 3 We act with honesty and transparency.



## General Code of Conduct

- 1 We respect human freedom and avoid discriminatory speech or actions.
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- 3 We act with honesty and transparency.

When an OMIMO module has specific codes of conduct for certified practitioners and accredited trainers, those individuals must adhere to both the module-specific codes and this General Code of Conduct.



## **μP3P Code of Conduct**

Project managers work with many people, and their decisions can significantly impact people's lives. As a result, P3.express insists that project managers have a social responsibility, especially against the project team members. Given that micro.P3.express projects are smaller and they may also switch hats and change their Project Manager Hat all the time, this responsibility won't be as essential as in P3.express, but it still exists.

Some responsibilities are implied in various activities and some that are more abstract and can be used as general guidelines for day-to-day decisions are documented in the Code of Conduct. Like everything else in this ecosystem, the Code of Conduct was developed with the help of many practitioners and was open for public review before being finalized. All modules (the method, the Code of Conduct, etc.) also accept comments after being finalized. These comments will be collected and usually used to prepare the next version of the module. So, encourage your audience to contribute to this or any other module by submitting their improvement ideas.



**μP3P  
Code of Conduct**

1

2

3

4

5

6



**μP3P  
Code of Conduct**

**1**

I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;

**2**

**3**

**4**

**5**

**6**





## **μP3P Code of Conduct**

- 1** I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;
- 2** I commit to striving to continuously improve my project management skills;
- 3**
- 4**
- 5**
- 6**



## **μP3P Code of Conduct**

- 1 I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;
- 2 I commit to striving to continuously improve my project management skills;
- 3 I respect human freedom, and I avoid engaging in discriminatory speech or actions in my projects, related to matters including but not limited to gender, age, race, nationality, sexual orientation, political affiliation, and beliefs;
- 4
- 5
- 6



## **μP3P Code of Conduct**

- 1** I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;
- 2** I commit to striving to continuously improve my project management skills;
- 3** I respect human freedom, and I avoid engaging in discriminatory speech or actions in my projects, related to matters including but not limited to gender, age, race, nationality, sexual orientation, political affiliation, and beliefs;
- 4** I respect the resources invested in the project;
- 5**
- 6**



## **μP3P Code of Conduct**

- 1** I consider project management to be a key element in the betterment of societies, and as such, regard my role in project management as a social responsibility;
- 2** I commit to striving to continuously improve my project management skills;
- 3** I respect human freedom, and I avoid engaging in discriminatory speech or actions in my projects, related to matters including but not limited to gender, age, race, nationality, sexual orientation, political affiliation, and beliefs;
- 4** I respect the resources invested in the project;
- 5** I always remain open and yet critical to project management topics, without sacrificing professionalism for affiliations, personal gain, or loyalties, and I will encourage my coworkers to do the same; and
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## Definitions

The Vision, Mission, and General Code of Conduct refer to 5 defined phrases that we'll go through next. These definitions are key in understanding OMIMO and its purpose.



## Definitions

### (1) Our target projects

On the one hand, it's not realistic to target all projects, and on the other hand, the dominant project types shouldn't make us forget the diversity of project types. Therefore,

- our primary target is all projects that are
- not exceptional and
- not considered trivial by their owners.

This target group includes a wide range of projects, such as

- technical, scientific, educational, cultural, artistic, humanitarian, recreational, ...,
- simple and complex,
- internal and external,
- large and small,
- commercial and non-commercial,
- Etc.

This target differs from many other project management resources in two ways:

1. It contains a larger set of project types.
2. It focuses on the most typical projects in each type and doesn't complicate things by covering their edge cases.





## Definitions

### (2) Project ecosystem

The project ecosystem includes the 5 management layers defined in OMIMO's landscape, as well as general management concepts surrounding them:

- Layer-specific modules
  - Layer 5: Portfolio management
  - Layer 4: Program management
  - Layer 3: Project management
  - Layer 2: Team management
  - Layer 1: Task management
- Cross-layer modules
  - decision making and critical thinking
  - conflict resolution
  - facilitation
  - Etc.



## Definitions

# OMIMO

### (3) Open

All first-party OMIMO resources will be provided with a Creative Commons license (usually Creative Commons Attribution). This means that they respect the freedoms of the users and don't limit them by copyright restrictions. Legally, the rights granted to the users are permanent and cannot be revoked in the future.



## Definitions

# OMIMO

### (4) Minimalist

All modules will focus on the essentials instead of becoming bloated by trying to cover all possible aspects. This keeps the modules small and easy to learn, use, and teach.



## Definitions

# OMIMO

### (5) Modular

All modules will be designed with clear, minimal interfaces and allow users to easily combine them with OMIMO and non-OMIMO modules. This respects user freedom by avoiding vendor lock-in.

① High-level overview

② Full review

③ NUPP

④ Tailoring

⑤ Context

 ⑥ Certification

## micro.P3.express Practitioner ( $\mu$ P3P)

### Certification Program

$\mu$ P3P is a global certification program that defines the minimum level of expertise required to

- take a leadership role in projects that use micro.P3.express, and
- coach others to implement and use micro.P3.express in their projects.

This certification targets micro-projects with approximately 1 to 7 team members. The P3.express Practitioner (P3P) certificate is suitable for larger projects.



As a trainer, please note that the goal of the course is NOT for the learners to pass the exam but rather to learn a project management system they can immediately implement and use in their projects.

Passing the exam is a byproduct of the main goal rather than the goal itself.

## micro.P3.express Practitioner (μP3P)

Certification Program



### Requirements:

- Accepting the μP3P Code of Conduct
- Passing the μP3P exam

## micro.P3.express Practitioner (μP3P)

Certification Program



### Validity:

- Valid for life, but attributed to the year of issue
- Free re-certification



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## micro.P3.express Practitioner ( $\mu$ P3P)

Certification Program

### Validity:

- Valid for life, but attributed to the year of issue
- Free re-certification

- One free attempt,
- during the first 3 months of each year,
- for practitioners who have the previous certificate.



The re-certification system described here is permanent.

## micro.P3.express Practitioner (μP3P)

Certification Program



### Exam format:

- Open book
- 50 questions
- 70 minutes
- 67% passing score
- No penalty for wrong answers

## micro.P3.express Practitioner (μP3P)

Certification Program



### Format of questions:

- **Multiple-choice**
  - with 2 or more choices
  - where only one choice should be selected
- **Multiple-answer**
  - with 3 or more choices
  - where more than one choice should be selected

## micro.P3.express Practitioner (μP3P)

Certification Program



### Format of questions:

- **Scenario-based** 70% of questions
- **Direct** 30% of questions

## micro.P3.express Practitioner ( $\mu$ P3P)

Certification Program



### Format of questions:

- **Cognitive level 1**      20% of questions      recalling
- **Cognitive level 2**      55% of questions      recalling + basic analysis
- **Cognitive level 3**      25% of questions      recalling + advanced analysis and deduction

Number of questions	Topic
3	NUPP
1	License and rights
3	Tailoring
6	Context
3	Project Manager Hat
2	Investor Hat
2	Creator Hat
2	User Hat
4	Sponsor
2	Peer reviewer
2	Custodian
5	Initiations
2	Daily Management
2	Closures
2	Post-Project Management
9	Integrated Project Board



Please explain that the  $\mu$ P3P exam is not about memorizing anything but understanding the approach and making good decisions in relevant scenarios.

# micro.P3.express

minimalist project management system for micro-projects

