

roadmap

for easy project management

version 1.1



PMEZ

we tamed project management for you TM



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The PMEZ Roadmap is a understandable and practical way to learn real project management. It's great for people

- suddenly thrust into the role of project manager
- unsure about how to use project management on real life projects
- too busy to take jargon-heavy training
- or, curious about the role

Along with the four project phases, the Roadmap includes a collaborate phase because **projects are achieved through the efforts of many people**. The PMEZ Roadmap streamlines the complexities of project management into accessible steps, helping you

- align your goals and actions
- stay organized and focused
- anticipate and adapt to challenges
- achieve meaningful results with confidence



Note, that unlike the other PMEZ guides, you will need to watch our YouTubes (available soon) or take a workshop to access the full content of the Roadmap.



host a workshop for the PMEZ ROADMAP

in-person or virtual
from 5-20 participants

micro PMEZ ROADMAP

FOUR *one-hour sessions*

Learn the PMEZ project management phases and **five ROADMAP techniques** all by applying them to a project of your choice.

mini PMEZ ROADMAP

SIX *one-hour sessions*

Learn the PMEZ project management phases and **seven ROADMAP techniques** all by applying them to a project of your choice.

total PMEZ ROADMAP

EIGHT *one-hour sessions*

Learn the PMEZ project management phases and **ten ROADMAP techniques** all by applying them to a project of your choice plus learn the **three collaboration skills** any project manager needs to be successful.

visit pmez.org to host a workshop



initiate

charter
stakeholder analysis

understand what success looks like and get people aligned

charter

what are we trying to achieve and why does it matter

- identify key values, outcomes, timelines and resources
- get stakeholders on the same page

stakeholder analysis

who needs to be involved and how do we keep them engaged

- identify those affected or involved in the project
- assess their influence, interests and attitudes
- prioritize how to engage them

plan

scope

work breakdown diagram

resource list

risk tracker

timeline and schedule

turn the charter into an actional plan

scope

what exactly must be delivered

- establish the boundaries for what is included and excluded
- capture important work needed ‘behind the scenes’

work breakdown diagram

what is the overall effort required to deliver the scope

- add additional detail to the scope
- organize the effort into manageable chunks



plan

scope

work breakdown diagram

resource list

risk tracker

timeline and schedule

turn the charter into an actional plan

resource list

what people, places and things will be needed

- identify the people, tools and materials needed
- check for availability and address gaps

risk tracker

what might go wrong and how can it be handled

- identify and prioritize potential challenges
- develop approaches to mitigate

timeline and schedule

who needs to what and when

- layout the the tasks and milestones
- assign resources and dates



execute

status and troubleshooting
change tracker

complete tasks and adapt to changing circumstances

status and troubleshooting

are things on track

- monitor progress regularly
- address problems as they arise and adjust plans if needed

change tracker

how to adapt to unplanned events

- identify situations that impact the charter, scope or timeline
- decide how to adapt, in needed

close

key learnings

capture lessons learned to improve future projects

key learnings

what worked well and what could be done better next time

- reflect on successes, challenges and opportunities for improvement
- find ways to use in future projects

collaborate

communication
team building
conflict management

work effectively with others to ensure success

communication

how to effectively elicit and convey the right information

- actively listen to truly hear people
- adapt communication style so the message can be understood

team building

how to create an environment where people thrive and contribute

- encourage contributions and create an environment that enables open discussion
- address team issues by understanding underlying factors such as people's drive, capacity or inter-dependencies

conflict management

how to mediate differences among people effectively

- detect which conflicts need to be addressed
- use active listening and mediation to ease the conflict



PMEZ ROADMAP

phases and techniques

initiate

- ☐ charter
- ☐ stakeholder analysis

plan

- ☐ scope
- ☐ work breakdown diagram
- ☐ resource list
- ☐ risks tracker
- ☐ timeline and schedule

execute

- ☐ status and troubleshooting
- ☐ change tracker

close

- ☐ key learnings

collaborate

- ☐ communication
- ☐ team building
- ☐ conflict management







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more free guides
booking a workshop

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