



Project plan for website

Approve navigation structure  
AG

Navigation structure designed and approved  
AG

Design look and feel  
DR

## EFFECTIVE PROJECT MANAGEMENT USING MINDGENIUS

### What is Project Management?

Project Management is the science of managing a one-off project through to conclusion. This requires the setting of a plan, breaking the overall project down into individual, more manageable tasks (with start and finish dates, costs, resources and durations for each task), and monitoring and reacting to any deviations from the plan.

### Traditional Approach

Software tools such as MS Project are often used to produce and maintain a project plan. However, when it comes to collating the ideas and information that are fundamental to scoping the work involved in a project, and to designing an effective project plan, traditionally flip charts or white boards are the only tools available.

Such idea gathering typically runs into many pages, all of which need to be pored over in detail in order to be properly interpreted and understood. This is an extremely arduous task that can take weeks to conclude. As a result, project plans often fail before they are even implemented, due to the lack of planning, preparation and consideration of all relevant information at the outset.

This problem, as we will show, is overcome totally with MindGenius.

### Project Management with MindGenius

Project Management with MindGenius becomes simple and straightforward. To begin scoping and designing your project properly, you need only a meeting room with computer projection capability and a PC with MindGenius installed.

The project scoping session will require a facilitator to ensure that all areas are covered thoroughly and given equal weight, and ideally a scribe to type the thinking directly into MindGenius.

If a scribe were not available, the facilitator would typically log the thinking him or herself. Typical questions used by a facilitator are available by viewing the Project Management sample map directly from the Help menu.

Effectively managing a project, from the initial thinking stage through to project close, requires both MindGenius business and Microsoft Project installed on your own desktop, and those of the project team. MindGenius can be used to great effect at all stages of project management. To find out more, read on.

We all have tasks to perform on a daily basis. When the tasks interrelate to each other and combine to achieve an overall end objective, we are involved in a project. There is a wealth of knowledge and experience contained in volumes of books on project management, lots of 400+ page tomes. Yet in practice, many project management approaches used are often erratic, ineffective, and incomplete.

MindGenius can help you manage projects more effectively if you follow a process such as the one shown below:

- 1. Scope** - What has to be achieved? What is the scope of the task? How will success be measured? What are the risks and are they acceptable? What assumptions have been made and are they valid?
- 2. Plan** - What specific activities need to be carried out to achieve the end objective? In what sequence must these tasks be carried out? Are there interdependencies between different tasks? Who is responsible for these tasks? What resources are required? When do the tasks have to be completed by? Communicate plan and allocate tasks to the responsible people
- 3. Deliver** - Carry out tasks. Have they been completed satisfactorily? Are there unforeseen challenges that require to be addressed?
- 4. Monitor** - Understand where you actually are versus where the project plan says you should be. Are there changes to timescales, resource usage, budget, and deliverables that impact the project plan? What corrective/preventive actions need to take place in order for you to achieve the end objective?

To let you see how MindGenius can help you with the project management process, let's use the following scenario.

*You are tasked with managing the company's presence at an exhibition 400 miles away in approximately 3 months time.*

Now let's go through the project management process using MindGenius.

## Step 1 - Scope

You need to have a clear vision of the purpose of the project. All too often people fall into the activity trap. They immediately dive in and address the details of the specific activities that have to be carried out. Before you do this you must be able to answer the following questions:

- What has to be achieved?
- What is the scope of the task?
- How will success be measured?
- What are the risks and are they acceptable?
- What assumptions have been made and are they valid?

How can you dive into detail without knowing the answers to the above? Yet many people do so and are surprised when their projects are late, over budget and do not deliver the desired benefits.

MindGenius helps you address these questions.

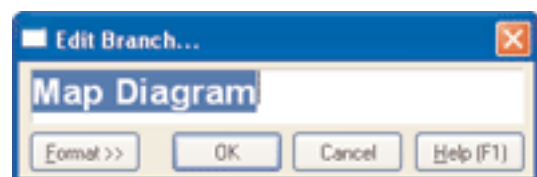
The first step is to launch a new MindGenius map. To do this:

1. Press the 'New' button  on the toolbar

When the map opens you will be prompted to enter a brief description of the subject matter. In this case, you would type in "Exhibition project" which would overwrite the 'Map Diagram' text.

Pressing 'OK' or the Return key results in the root branch of the map being titled 'Exhibition Project'.

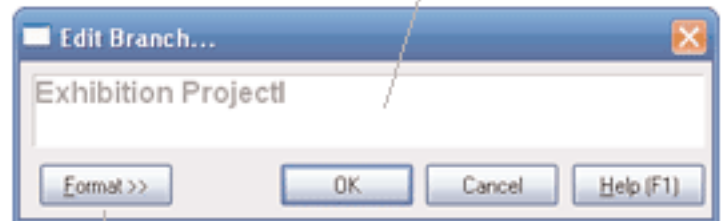
You can now use MindGenius to help you answer the scoping questions.



MindGenius incorporates a special branch text entry method to minimise any intrusion into your thought process. Click on any branch. You have now selected the branch (parent) to which you wish to add a sub-branch (child). As you type in the child branch title, the 'Add Branch' dialog will automatically appear in response to your keyed input. Continue typing the title and press Return to add the branch.

1. Select the (parent) branch to which you wish to add information and *start typing*

2. The 'Add Branch' dialog will appear, complete the title of the new branch and press the return key or 'OK'



3. The new information is added as child branches

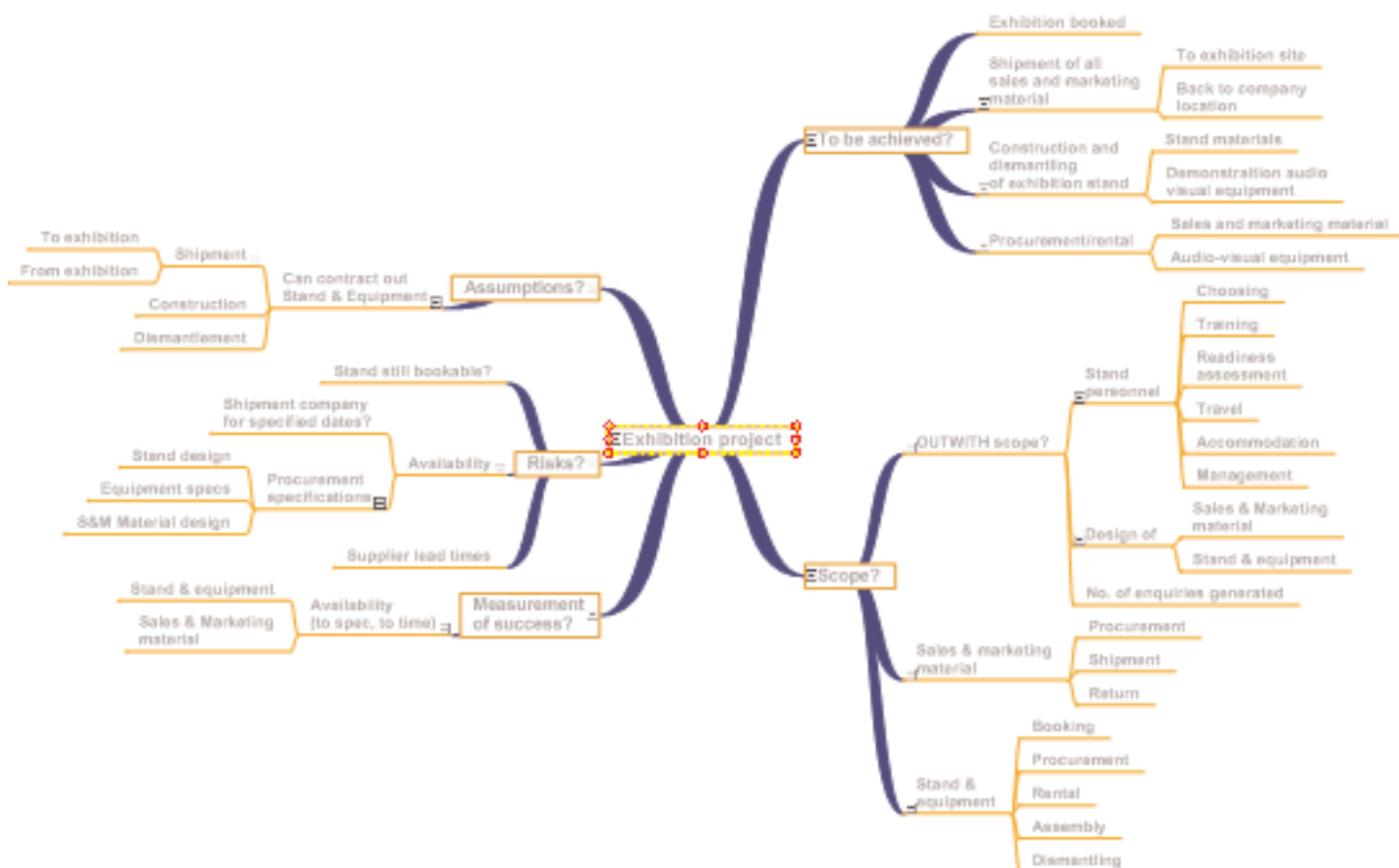
*Tip:* Press the format button to change the look of the text in the branch.

You can continue to 'type-and-return' and more child branches will be added to the parent branch, or select a different parent branch to add child branches to.

Click on the root branch to select it, then type and enter the scoping questions. This will result in a map that looks as follows:

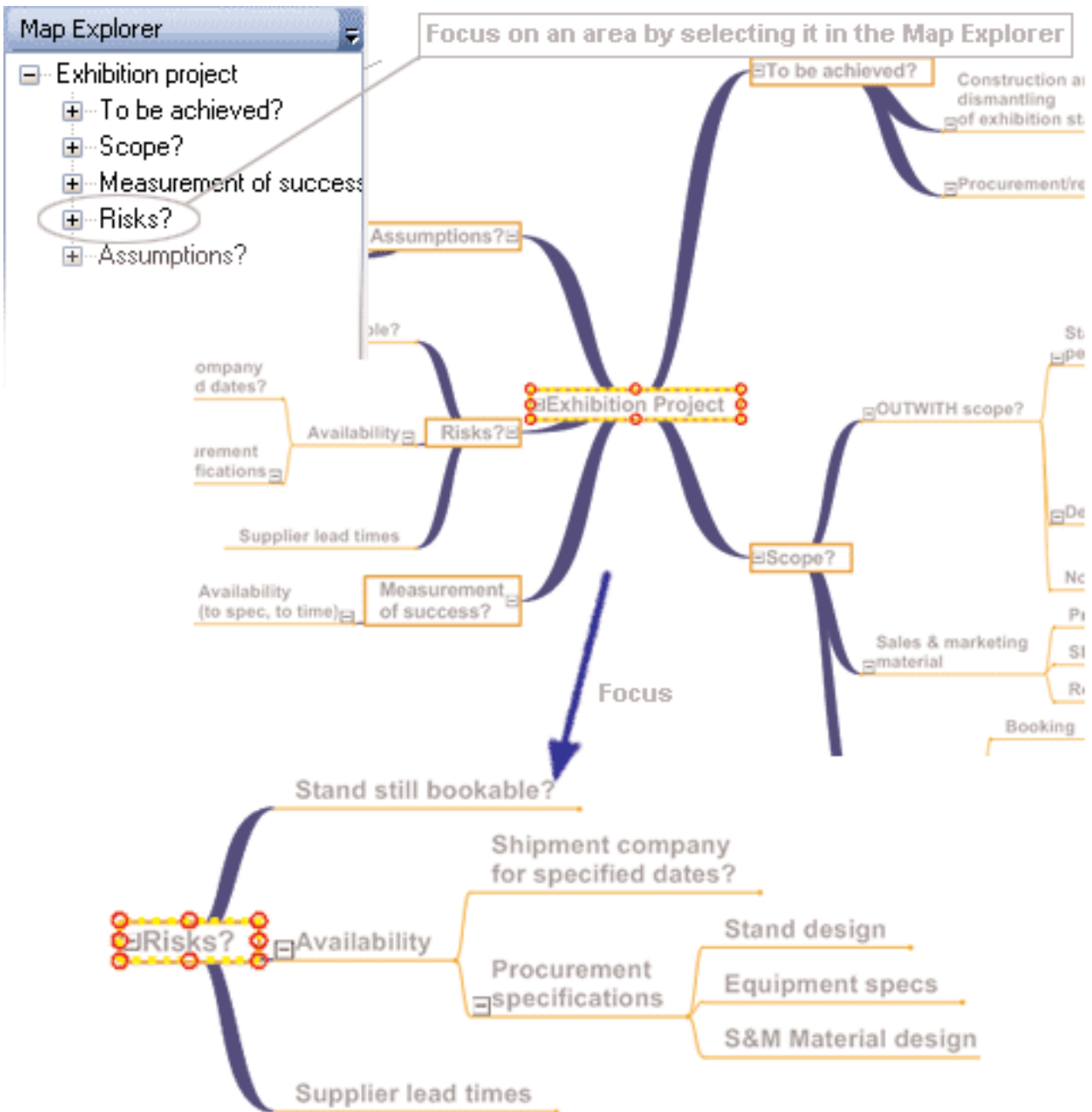


The first step is to explore the scoping questions. So you click on a branch and start recording your thoughts using the 'type-and-return' method.



You are just at the first stage and already your map has started to become complex - that's the nature of most practical activities.

Your map has already grown in size and complexity. MindGenius has a Map Explorer feature that gives you powerful navigation capabilities and allows you to 'walkthrough' your map and focus in on specific areas by drilling down.

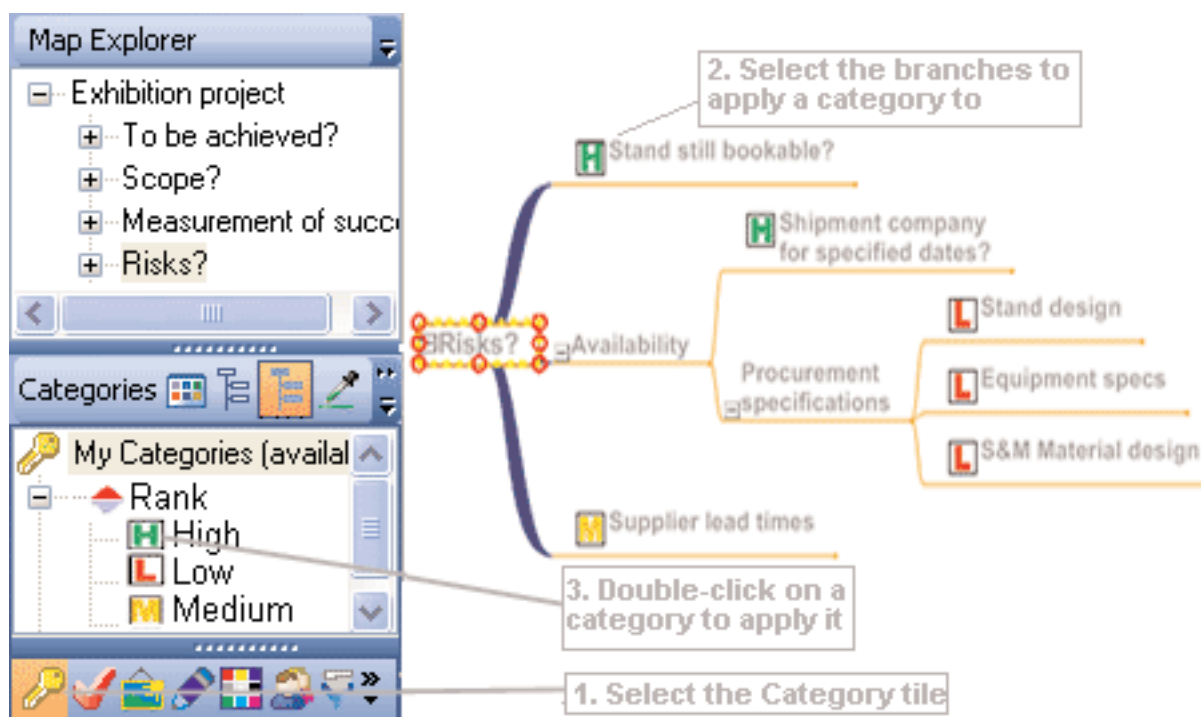


Now you can explore the risks and ascertain whether or not they are acceptable.

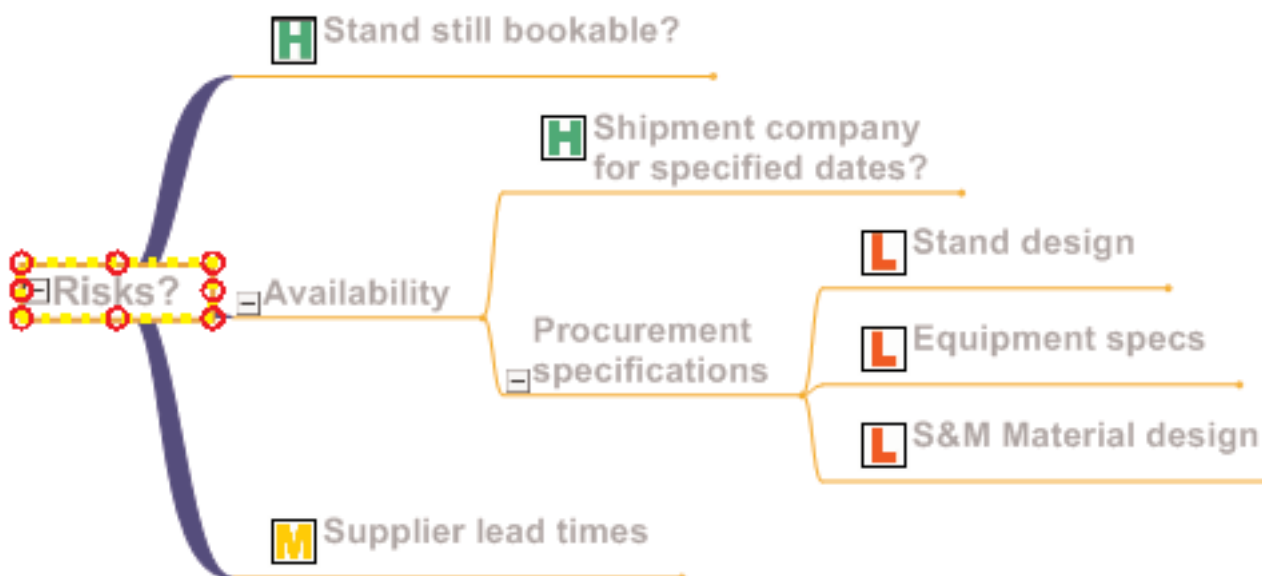
Not all of your risks have an equal probability. Some risks will be higher than others. You need to rank them e.g. high risk, medium risk, low risk. MindGenius provides you with the capability of assigning key words (categories) to branches. You can use them to visually indicate the likelihood of success and the likelihood of achieving the desired benefits.

Using the MindGenius categories you can assign the appropriate key word to a branch. In this case we will use the following category symbols:

|             | High     | Medium   | Low      |
|-------------|----------|----------|----------|
| Risk Factor | <b>H</b> | <b>M</b> | <b>L</b> |



Your assessment of the risks may be as follows:



There will be a reason why you have selected specific ratings for the risks. You can add this detail, whilst preserving the visual summary of your map, by inserting text as a note to a branch within your map.

**1. Select the branch to add a note to**

**2. Open the Notes editor by selecting the blue pencil icon**

**3. Enter notes by typing directly into the editor**

The notes symbol appears in the branch to indicate the presence of a note

Need more room? Press here to dock the Notes Editor to the bottom of the screen

Map Explorer

- Exhibition project
  - To be achieved?
  - Scope?
  - Measurement of success?
  - Risks?
  - Assumptions?

Notes Editor

The stand design that will be used is likely to be the company's standard exhibition design and the design specifications already exist and the stand component parts are in storage from previous exhibitions

Stand still bookable? ✓ GW Book Exhibition stand

Availability

- Shipment company for specified dates?
  - Stand design
  - Equipment specs
  - S&M Material design
- Supplier lead times

In your risk assessment you have identified that there are two high risk areas - the booking of a stand at the exhibition and the availability of a shipment company for the exhibition dates. These are high risk because they are outwith your control and need to be resolved now if your project is to be successful. You need to take action.

MindGenius allows you to set a branch as an action, to allocate a named person to be responsible for the action and assign specific dates against the action.

Map Explorer

- [-] Exhibition project
  - [+] To be achieved?
  - [+] Scope?
  - [+] Measurement of success?
  - [+] Risks?
  - [+] Assumptions?

Action

- Action For Outlook?
- Start Date: 22/10/20
- Due Date: 22/10/20
- Completed [ 22/10/20
- Duration: 0
- % Complete: 0
- Priority: [v]
- Status: [v]

4. Press the update button to apply the filter

2. Select the branches to apply an action to

3. Enter a suitable Action property

1. Select the Action tile

Stand still bookable? GW Book Exhibition stand

Risks? Availability

Shipment company for specified dates?

Procurement specifications

- Stand design
- Equipment specs
- S&M Material design

Supplier lead times

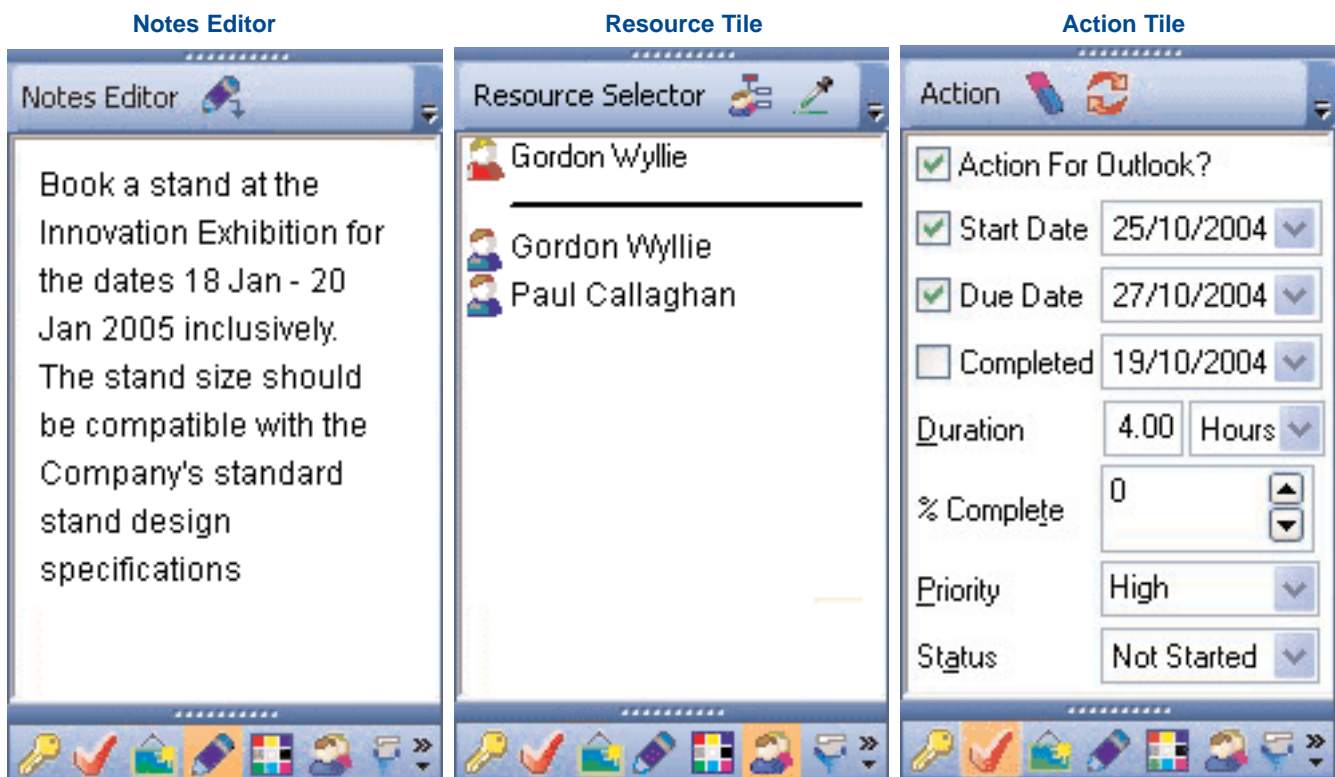
In this instance, let's focus on the 'Stand still bookable?' branch. Add a child branch and title it 'Book Exhibition stand'. Assign the resource as 'Gordon Wyllie', who is responsible for procurement of exhibition space. Set the branch as an action, with the action settings shown below:



Resources are applied in the same way as categories, i.e. select the Resource Tile, select a branch and double-click on a resource. The initials of the resource applied will appear in the branch title. However, initially there will be no resources in your Master Resource List. They can be quickly added in one of two ways:

1. Import the resources from your Outlook Contacts list:
  - a. Select 'Outlook Sharing', then 'Import Resources from Outlook' from the File menu
  - b. Follow the simple wizard steps to import a list of resources
2. Add the resources manually to the Master Resource List:
  - a. From the Edit menu, select 'My Resources'
  - b. Using the dialog add new resources

After adding a note, assigning an action and resource, the contents of the three tiles should resemble the screen-shots below:



You can now assign the action on Gordon Wyllie by exporting it to Outlook.

To export actions to Outlook:

1. From the File menu, select 'Outlook Sharing' then 'Export Actions to Outlook'
2. Select 'OK' in the Export Options dialog, as the defaults are suitable

Exporting the action via Outlook will result in the following task appearing in Gordon Wyllie's Outlook task list:

To: Gordon Wyllie

Subject: Book Exhibition stand

Due date: Wed 27/10/2004 Status: Not Started

Start date: Mon 25/10/2004 Priority: High % Complete: 0%

Keep an updated copy of this task on my task list

Send me a status report when this task is complete

-----  
 Book a stand at the Innovation Exhibition for the dates 18 Jan - 20 Jan 2005 inclusively. The stand size should be compatible with the Company's standard stand design specifications

Depending on your Outlook options, you may also have a copy of this task in your own task list.

You would complete your assessment of the risks and then verify whether or not your assumptions are valid or not. You have assigned actions on tasks that have been identified as requiring urgent action. (When the actions are completed and you get feedback on their outcome, you can update your risks and assumptions accordingly).

Having scoped the project, you are now clear as to what has to be achieved and how success will be measured. Save your scoping map. You can now move on to the next stage in the process.

## Step 2 - Plan

You now need to consider what specific activities need to be carried out to achieve the end objective and in what sequence must these activities be carried out?

Create a new map and title it 'Exhibition project plan'.



You have already scoped the project and may need to refer to this information to keep you on track. MindGenius provides you with the capability of attaching multiple electronic files to any branch.

1. From the Insert menu, select 'Attachment...'
2. Browse for the file to attach and press 'OK'
3. The attachment symbol (green paper-clip) will appear next to the branch title. Double-click on this symbol to open all attached files.



Browse for the Exhibition project map file that you previously saved, select it and add it as an attachment to the root branch. Double-clicking on the Attachment symbol will launch the scoping map in its native application (in this case MindGenius).



You can now start to 'type-and-return' activities you think will be required to achieve the end objectives. You could simply brainstorm your ideas around the root branch, but the preferred approach is to take a strategic view and progressively drill down to specific activities. The concept of parent and child branches directly equates to the concept of summary tasks and detail tasks.

Considering what you have to achieve then, the project could break down into four distinct stages:

- Gather equipment and material
- Construct Exhibition stand
- Support Exhibition stand
- Dismantle Exhibition stand



As you build your map it automatically structures. Each branch has a unique identifier, which indicates its position and sequence in the hierarchy of the map.

This equates to the Work Breakdown Structure (WBS) that you see in project plan


To display the numbers select 'Numbering' from the View menu.

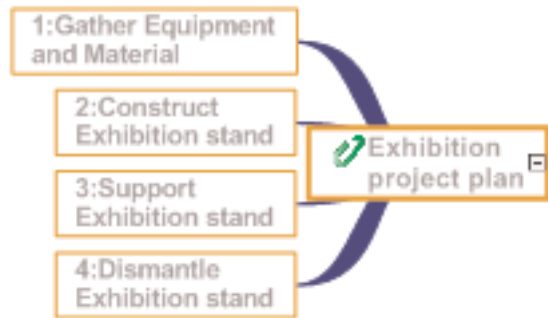


In most project plans the tasks that require to be done first start at the left hand side and the next tasks move in sequence from the left to the right.

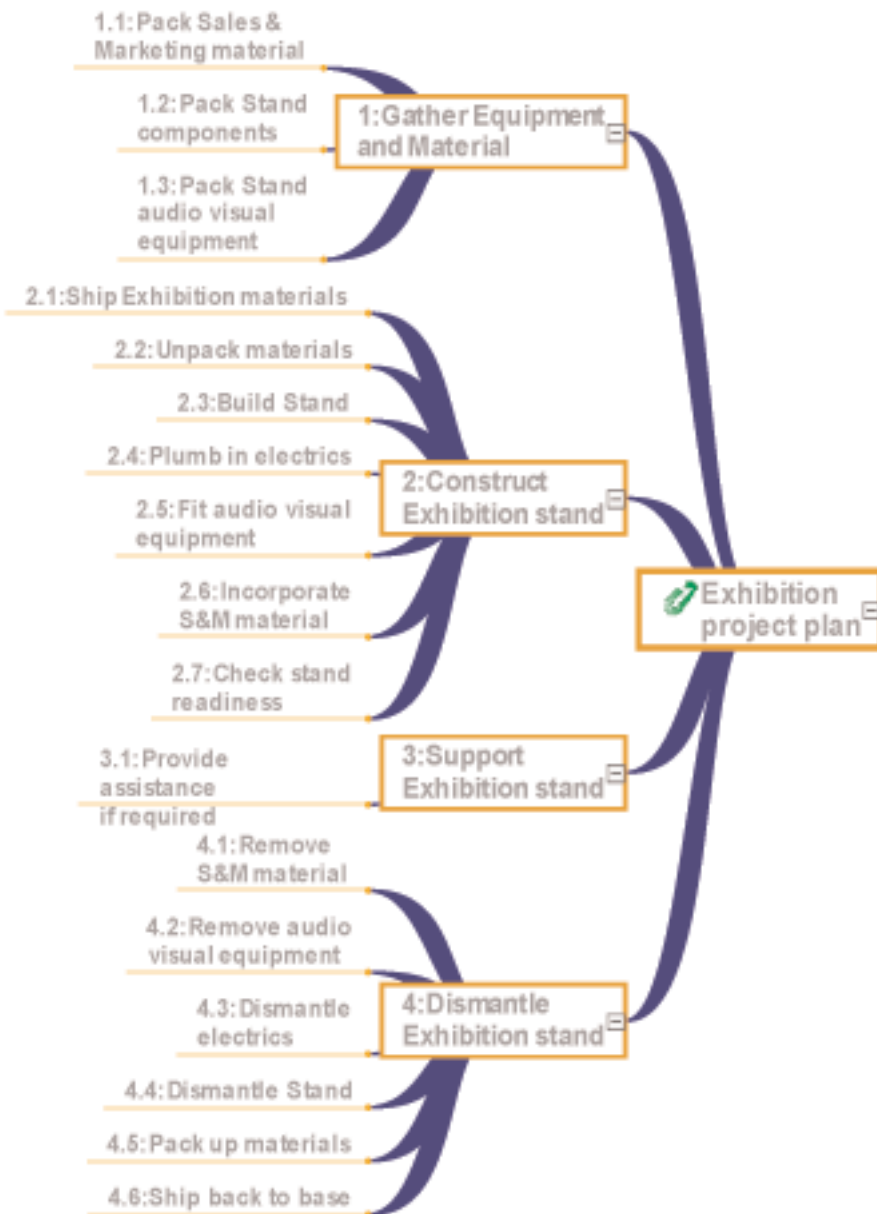


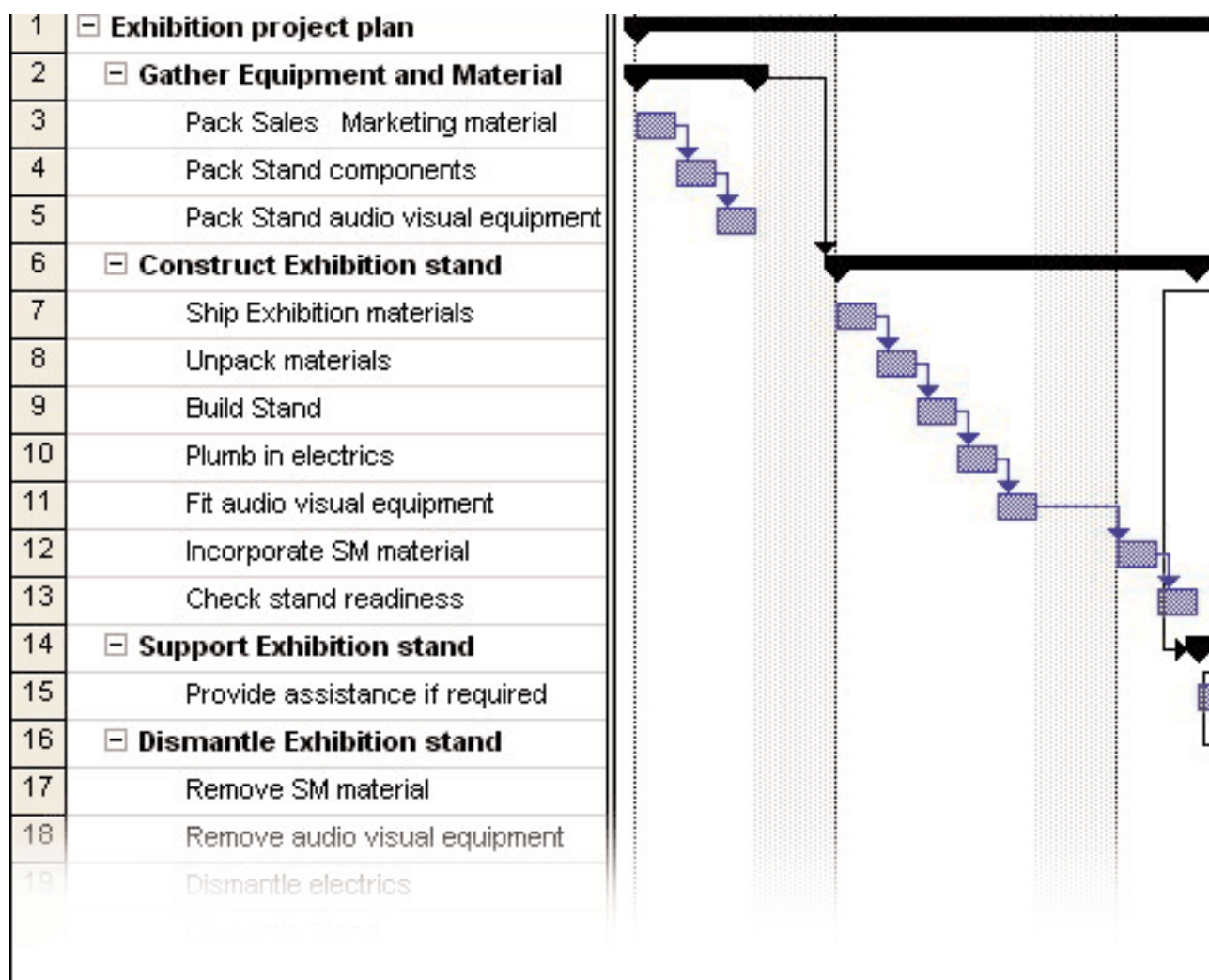
MindGenius allows you to take different viewpoints of your map.

Select  to change your map into the Input Tree view.




So let's add some additional tasks exploring more specific levels of detail:





This Gantt chart has been derived directly from your map. MindGenius gives you the capability of transferring the contents of your map directly into MS Project. To export to Project:

1. Select the Export to Project command  from the Export toolbar
2. The Export Options dialog will be presented. Select 'OK' to continue as the default options are suitable
3. Project will open displaying your exported map as a Gantt chart

For the purposes of the remainder of the document, let's focus on the 'Pack Sales & Marketing Material' activity.

If we continued to flesh out the tasks associated with this activity, your map will grow as shown opposite.

*Tips: If you are inserting a task then do it in a Verb-Noun format. E.g., Place contract.*

*If you are inserting a deliverable (or milestone) then do it in a Noun-Verb format. E.g. Contract placed.*



To make the deliverables stand out from the list of activities, assign a specific category to them.

This then allows you to use the MindGenius filter function to query your map.



In this case you can use it to identify what the deliverables are within the Pack Sales & Marketing material activity.

**Map Explorer**

- Exhibition project plan
  - Gather Equipment and I
    - Pack Sales \_ Marke
    - Pack Stand compo
    - Pack Stand audio v
  - Construct Exhibition sta
  - Support Exhibition stand
  - Dismantle Exhibition sta

**Filter**

Show actions due by: 08/01/2004

For these resource(s):

In the following categories: Deliverable

With this Keyword:

**3. Press the update button to apply the filter**

**2. Select the filter criteria**

**1. Select the Filter tile**

Shipment details arranged → Arrange shipment details

BoM available → Generate Build of Material (BoM)

Purchase list available → Identify material to be procured

Materials procured → Procure Sales & Marketing material

Packages available for collection → Pack materials for shipment

Pack Sales & Marketing material

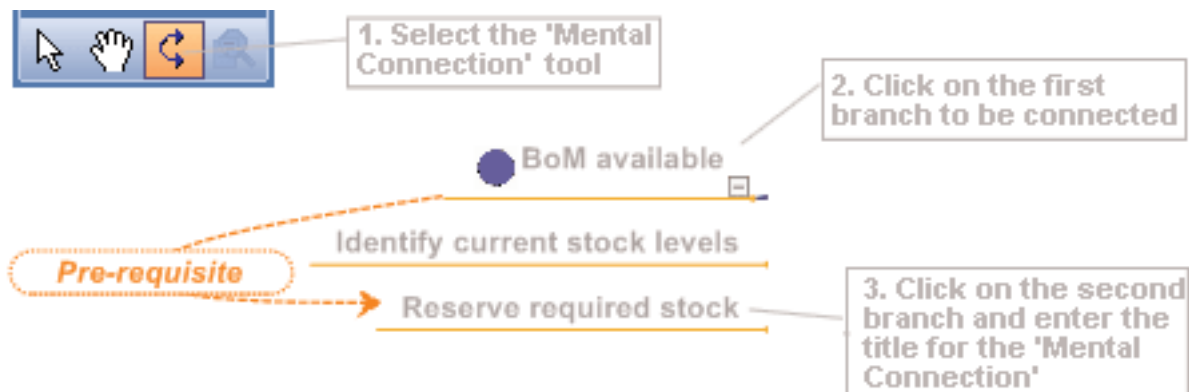
Filtering on the 'Deliverable' category results in the following map, where you can clearly identify the deliverables within your project plan. This screenshot shows a filter where all non-matching branches are hidden where possible. To access this option:

1. From the Tools menu select 'Filter' then 'Hide Non-Matching Branches'



Interdependencies will occur where the tasks are not in a straightforward sequence and you can identify linkages between tasks that cut across your map structure.

You can identify such linkages using Mental Connections:



Having generated a map of the tasks you can now assign information to the branches to develop a plan with resources and dates assigned. As you've already seen you can use MindGenius to assign resources and actions to branches.

For smaller, less complex projects you can manage your project from within MindGenius yourself.

For larger, more complex maps we would suggest that you export your map to MS Project and edit the task interdependencies and perform other more advanced project management tasks such as costing, PERT analysis, resource levelling etc. within the MS Project environment. You can then create a new MindGenius map from the updated MS Project file by importing the new file into MindGenius. To do this:

1. From the File menu, select 'Import' then 'MS Project'
2. The Import from Project dialog will be presented

3. The main features transferred between MindGenius and MS Project, or vice versa are shown below:

**Start Date**  
When should the project start?

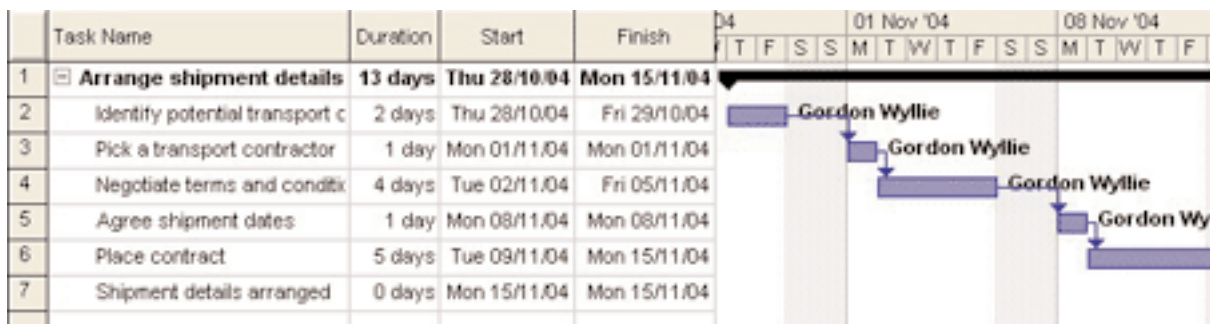
**Task Linking**  
How should tasks be linked?

**Optional Data**  
Select additional data to be exported:

|   |                           |
|---|---------------------------|
| <input type="checkbox"/> Resources          | - Added to Task Resources |
| <input type="checkbox"/> Priority           | - Sets Task Priority      |
| <input type="checkbox"/> % Complete         | - Task % Complete         |
| <input type="checkbox"/> Date Completed     | - Task Actual Finish Date |
| <input type="checkbox"/> Branch No. Prefix  | - Project WBS Mask        |
| <input type="checkbox"/> Attachments        | - Task Attachments        |
| <input type="checkbox"/> Branch Notes       | - Task Notes              |
| <input type="checkbox"/> Mental Connections | - Task Notes (Both)       |

4. Pressing 'OK' will import the file

From a Gantt chart, your project is transformed into a Map.



The plan can then be shared with others and any comments received can be incorporated if appropriate. When the plan is approved it can then be communicated to project participants and appropriate actions assigned.

You can now proceed to the next step in the process.

## Step 3 - Deliver

The people assigned can now proceed with addressing their tasks.

You can view the tasks that you have to carry out by filtering on yourself as a resource.

MindGenius also gives you the capabilities of looking at your maps from a different viewpoint. MindGenius will redraw your map based on the categories that it contains or by the resources assigned to the branches.

To do this:

1. Finish applying categories and resources to the original map
2. From the View menu, select 'Create Category Map...' or 'Create Resource Map...' depending on your requirement

A resulting resource map is shown right.



Clearly in this instance, all of the tasks associated with arranging the shipment details reside with 'Gordon Wyllie'.

A resulting category map is shown below.



You can see what tasks are completed and in progress. You can identify the deliverable that requires to be generated and the 'red flagged' tasks - the ones that need the attention - are also evident.

To deliver your tasks you will also have to overcome challenges, some predefined, some unforeseen. MindGenius provides you with the capability of implementing a wide range of methodologies and techniques to enable you to more effectively complete the tasks that you have been assigned.

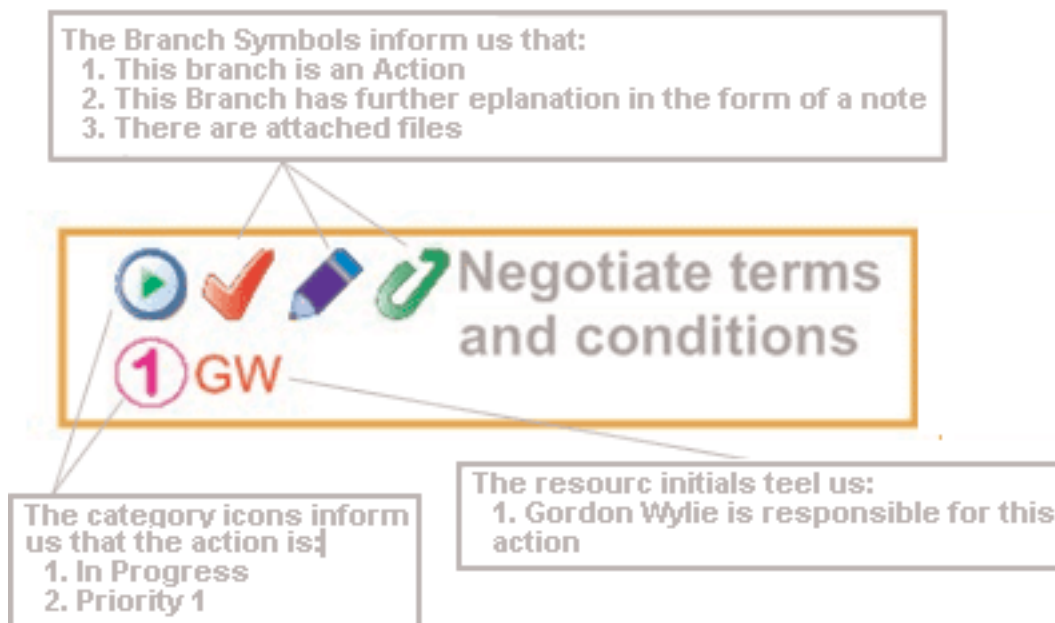
Other documents similar to this cover subjects such as:

- Brainstorming
- 6 Thinking Hats
- Mind Mapping
- Cause & Effect Analysis
- Solution & Effect Analysis
- Decision Making
- SWOT Analysis
- Meeting Management

## Step 4 - Monitor

Progress against each task can be recorded within MindGenius. You can use the following features to provide status information:

- **Action Tile** - You can include date changes, changes in priorities, % completion information.
- **Notes Tile** - Add a textual summary of the latest status against the task.
- **Attachments** - Link in supporting electronic information, e.g. test reports, trend graphs, checklists, fault analysis, budget spend, recovery plans.
- **Categories** - Visually identify specific aspects of progress against relevant branches.



*Tip: Hovering the mouse over any of the symbols will show summary details about the symbol or icons' meaning.*

With the branches of your map updated with the status you can then provide a progress report via a number of methods

### Face- to -face review

- Use Map Explorer to walk through your project and communicate the status of the project to others.
- Use full screen mode {View}, {Full Screen} to maximise the screen area used for the map
- Filter the map to only show and discuss the status against any 'red flagged' tasks.
- Go into as much or as little detail as your audience requires to communicate the status and meet their needs
- Convert into an MS Project plan if they are more comfortable in that environment

### Remote review

- Send as an e-mail attachment
- Package up your map and file attachments into a single file and send it as a file attachment
- Send the MindGenius files along with a viewer so that they can view the files even though may not have MindGenius on their PC
- Save the maps as HTML files and people can access them and view them over the internet/intranet.
- Run MindGenius on web conferencing applications such as WebEx to communicate your maps to people in different geographical locations.

Any actions or comments identified can be recorded within your map and the actions issued to the responsible people from within MindGenius.

## SUMMARY

MindGenius allows you to manage projects in a highly effective and practical way. It overcomes the operational difficulties associated with the traditional way of thinking through, preparing, and managing projects.

By using MindGenius, effective project plans which lead to ownership, and therefore action, become the norm in an organisation

Project Management - Scope, Plan, Deliver, Monitor - incorporates a common framework when working with MindGenius as detailed below:

1. Information is **GATHERED** from a range of sources and people
2. This information goes through a process of being analysed and **UNDERSTOOD** before decisions are taken as what it means and how we progress forward
3. Our findings and recommendations from the Understand phase are **BOUNCED** off any colleagues who could conceivably add value, by tapping into their collective knowledge, experience and creativity, and in doing so avoiding any difficulties encountered previously
4. Finally, with everyone in agreement on what needs to be done an action plan is produced to **DELIVER** the necessary components to ensure objectives are met

*Sample maps explaining the gather, understand, bounce and deliver phases are available directly from the Help menu.*