IN-PERSON PDD: PROJECT PLANNING & LESSON LEARNED

PMI Orange County (PMI OC)
PDD 2024

Dr. Vazi Okhandiar| PMI Orange County

05 17 2024

Agenda
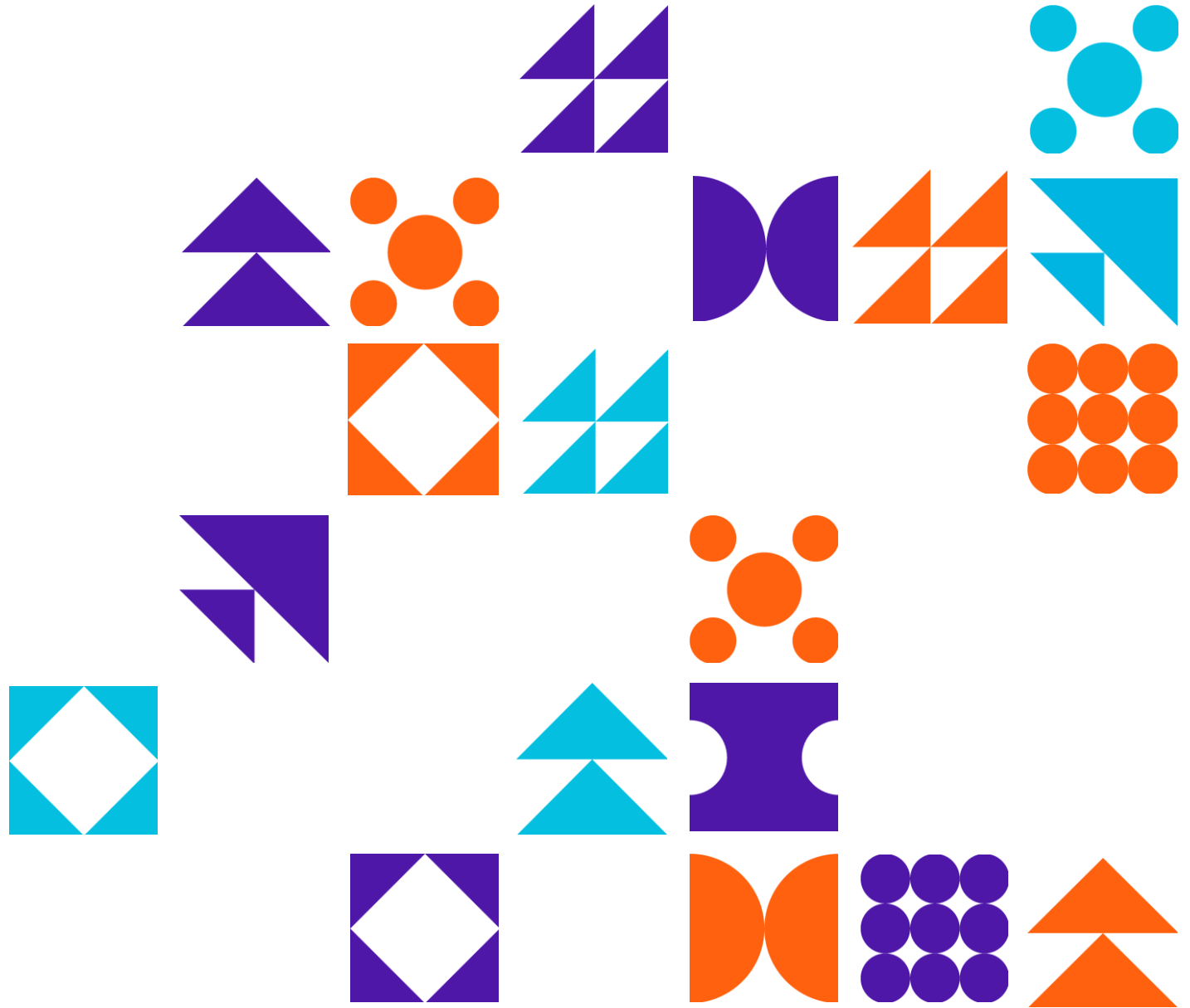
- **Overview**
- **Target Audience**
- **Event Planning**
- **Event Plan Execution**

Purpose: Designed to expose, educate, and bring together PMI-OC members and non-members the value of project management leadership, strategic and business Acumen.

Key Benefits

Remain relevant in a continually changing business environment.

To help PM grow and develop with the profession

Aligned with the employer-identified skills

Target Audience

- PMI-Members (SoCal)
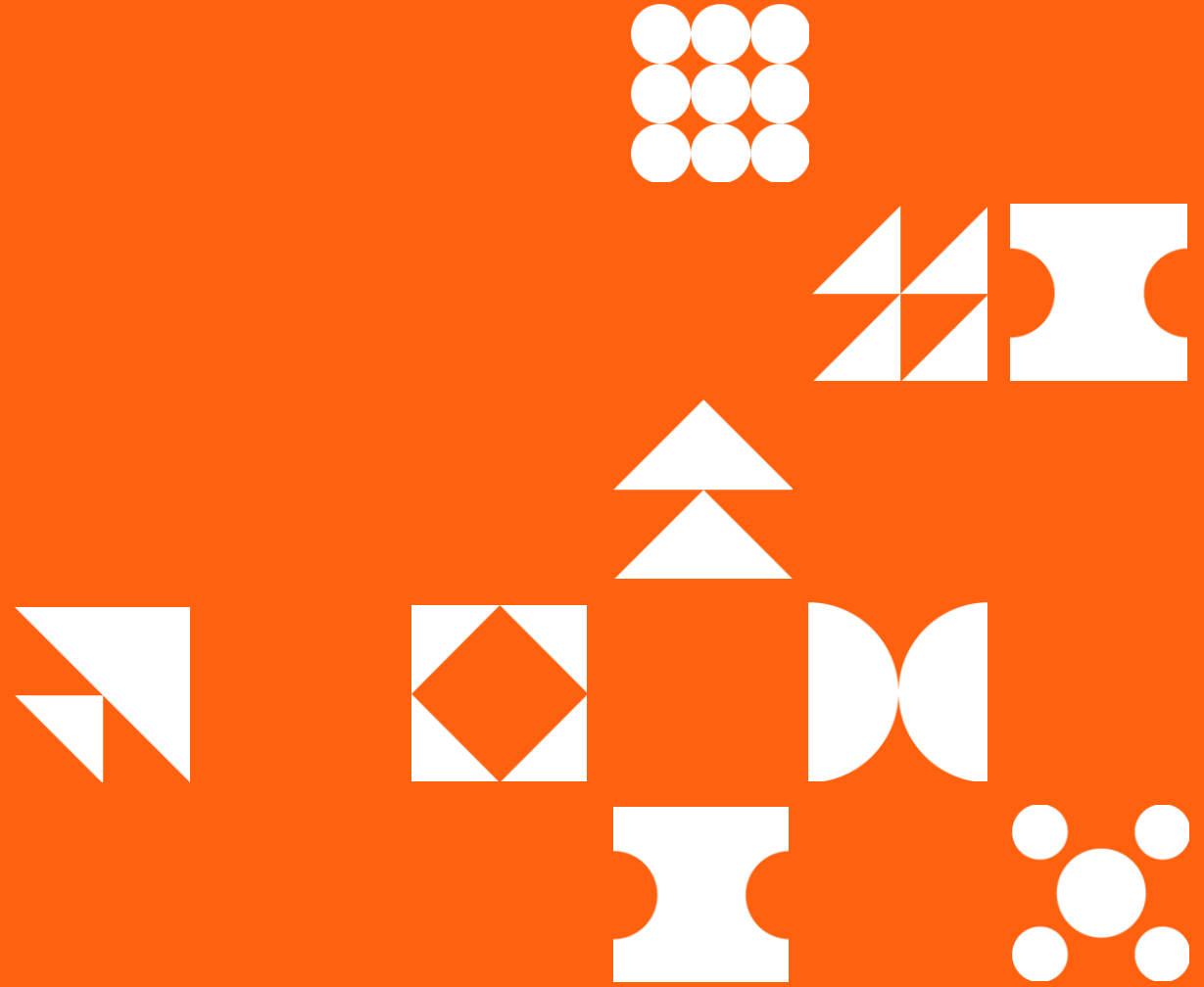- College Students
- Business Professionals
- Corporate

Stakeholder

- sponsor
- speaker
- vendor
- attendee

Industry

- IT
- Consulting
- Aerospace
- Healthcare
- Manufacturing
- Financial Services
- Government
- Telecommunications
- Construction
- Pharmaceutical
- Marketing
- Education
- Non-Profit Organizations

Event Planning

FRONT ENTRANCE

Tracks

Ways of Working	Power Skills	Business Acumen	Workshopt
Knowledge, skills and behaviors related to specific domains of Project, Program and Portfolio Management.	**Knowledge, skills, and behaviors specific to leadership-oriented, cross-cutting skills that help an org achieve its business goals.**	**Knowledge of and expertise in the industry or organization that enhances performance and better delivers business outcomes.**	Non PDU activities such as Career Development

High-level Schedule

TIME	PDUs	ROOM 1 Ways of Working	ROOM 2 Power Skills	ROOM 3 Business Acumen	ROOM 4 Workshops
7:45 - 8:15		Registration, Breakfast and Networking			
8:15 - 9:05	1	KEYNOTE SPEAKER -			
9:05- 9:15		Break			
9:15- 10:05	1				
10:05 -10:15		Break (Snacks)			
10:15 - 11:05	1				
11:05 -11:15		Break			
11:15-11:45	0.5	PM-related Activity			
11:45 - 12:50		Lunch, Networking			

PDD Team

VP Programs
Vazi Okhandiar

Director of PDD
Rachel Stafford

Speaker Coordinator
Laleh Abedinzadeh

Marketing Coordinator
Ramin Shandi

Sponsorship Coordinator
Marion Echenique

Event Coordinator
Rohini Nair

Sponsorship Specialist
Kerianne Waldrop

Sponsorship Specialist
Sabrina
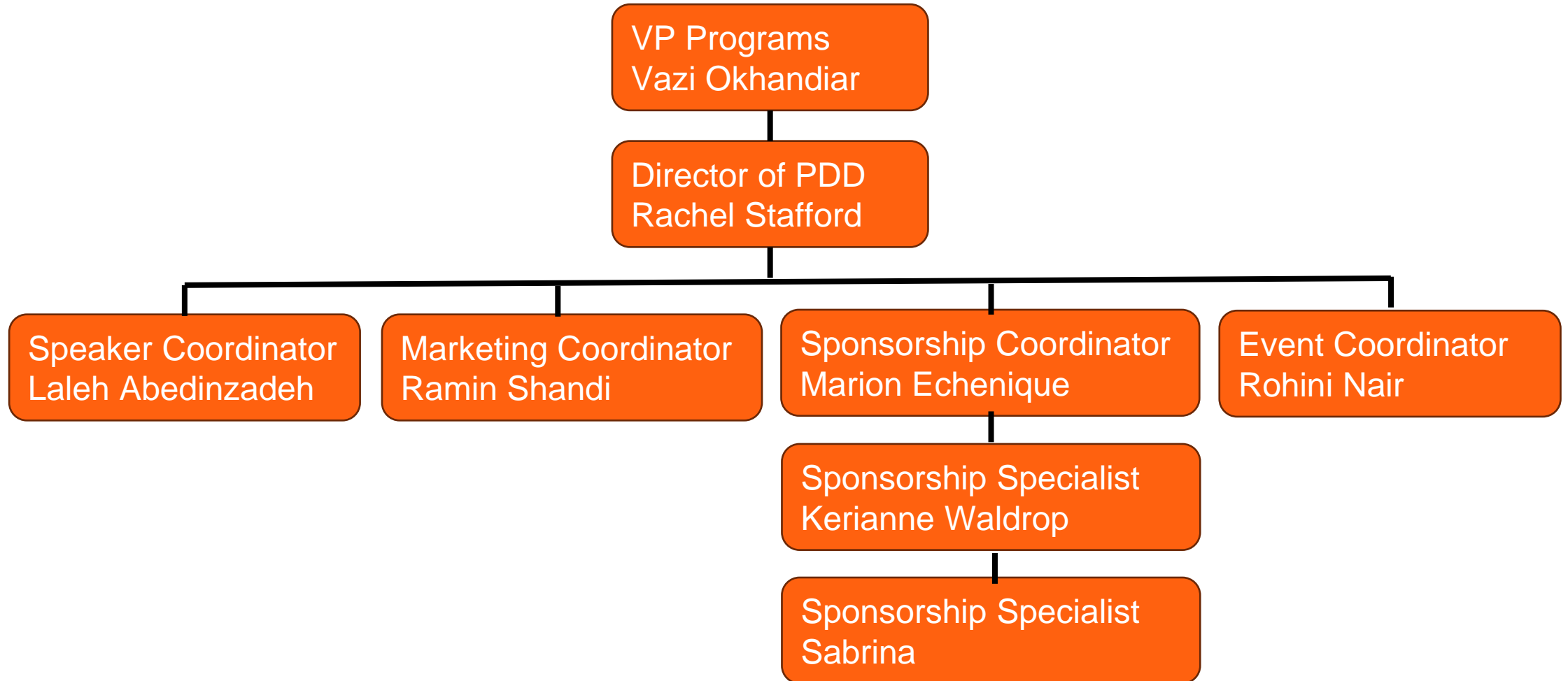
Additional Resources: Mai, Mina, Forrest, John, Paya, Narmella

Role & Responsibilities

Speaker Coordinator
- Speaker Invitation Email
- Collect Potential Speaker Info (Title, Description…)
- Define Process For Selecting A Speaker
- Send Email To Selected Speaker Regarding
- Get Speaker Agreement Form Signed
- Create Pmi-Oc Presentation Template
- Build Qr Code Per Speaker
- Design A Speaker Page For Website
- Collect Speaker Pictures, Video..
- Contact IT For Posting Speaker Info On The Website

Sponsorship Coordinator
- Develop A Sponsorship Package For The Event
- Develop A Sponsorship Agreement Document
- Get Sponsorship Agreement Document Approved By The Contract Department
- Develop A Sponsorship Tracking Template
- Create Sponsorship Ad For Marketing Department
- Contact Potential Sponsor
- Track Sponsorship Status
- Collect Sponsor's Logo
- Share Sponsor's Logo With It For Website Update

Marketing Coordinator
- Develop Template For Speaker To Post On Social Media
- Create Ad For E-Blast, Social Media And Linkedin Posting On Weekly Basis.
- Coordinate With Marketing And Communications Department
- Share Information With Sister Chapter Regarding The Event.
- Design Foam Board With Schedule For Each Room For The Event

Event Coordinator
- Build A Volunteer List
- Develop Room Reference Sheet
- Assign Room And Task To Volunteer
- Provide Training To Volunteers
- Develop Scripts For Volunteers
- Develop Event Survey For Attendee, Keynote Speaker, Speaker, Sponsor

ROOM REFERENCE SHEET

Crystal Ballroom (A thru E)

Wireless Password: Marriott02

Throughout the day…

Announcements:

- 10 minute break, sessions will resume at (insert time of next session)
- 2 minute warnings before next session
- Reminder to visit sponsor tables
- See you at our Networking Happy Hour! Sponsored by Project Insight

BALLROOM - VictoriaLeigh Julien (AM)		Mai Tran & Narmela Sargis (PM)
7:30	Registration	10 minute & 2 minute warning to take seats
8:00	Welcome and Sponsor Recognition	**Victoria Leigh** – Welcome & Thank you for coming. We've got a lot of people to thank but first I want to tell you how excited we are to have this event for the first time in four years. It's great to have you here! Now for a few comments from our Chapter president Mai Than. **Mai Than**

SPEAKER REFERENCE SHEET

SPEAKER SCHEDULE BY FIRST NAME

Wireless Password: Marriott02

Announcements:

- 10 minute reminder
- 2 minute reminder

ROOM	TIME	ACTIVITY	SESSION TITLE
LANDMARK	3:20	Amy E. Altomare, EdD, PMP, CSSBB	One Stop Shop - Combining Process Improvement with Project Management
LANDMARK	10:45	Betsy Stockdale, PMI-PBA, CSM	From Zero to Launch: A Guide to Nailing Down a New Project
CRYSTAL BALLROOM F	3:20	Courtney Shar PMP, ICP-ATF, ICP-ACC	Hunting Horcruxes: A Cautionary Tale
LAN			Management Landscape
HA			Great Communicator

Inventory List by Person for Friday, February 23, 2024

Mai Tran
-PMI-OC cups for speaker goodie bag
-two (2) PMI-OC 6' banner (vertical)

Narmela Sargis
-extra blue polo shirts from storage (M and L)

Vazi Okhandiar
-six (6) laptops (with PPT viewer installed)
--one (1) for IIL table
--five (5) for each room (main and four breakouts)
-UCI totes

Rachel Stafford
-PMI-OC table runner

Setup Checklist

Inventory
- ☐ Floorplan of Sponsors
- ☐ Balloons
- ☐ Banners
- ☐ Laptops - 3 total
- ☐ Badges - Attendees
  - ☐ Lanyards
  - ☐ Nametags
- ☐ Badges - Sponsors
  - ☐ Lanyards
  - ☐ Nametags
- ☐ PDU slips
- ☐ Program Agenda Boards for each room
- ☐ Certificates

No.	Name	Assigned Role	Assigned Room	Email
1	Allan Tannaya	Room Host (AM) (9:30 - 11:30AM)	Landmark	allan.tannaya@pmi-oc.org
2	Amol Chitte	IIL Booth - 8:00 - 10:30 AM	Main Crystal Ballroom A-E	amol.chitte@pmi-oc.org
3	Amy Wong	IIL Booth - 12:30 - 3:00 PM	Main Crystal Ballroom A-E	amy.wong@pmi-oc.org
4	Anita Arvizu	IIL Booth - 3:00 - 5:00 PM	Main Crystal Ballroom A-E	anita.arvizu@pmi-oc.org
5	Ariel Hollie	Room Host (PM) (3:00 - 5:20 PM)	Chapman	ariel.hollie@pmi-oc.org
6	Ashley Tran	Room Host (PM1) (1:00 - 3:00 PM)	Landmark	ashley.tran@pmi-oc.org
7	Bill Noyes	Event Photography	All rooms	william.noyes@pmi-oc.org
8	Christine Than	KForce Session Helper (2:15 PM)	Chapman	Christine.Than@pmi-oc.org
9	Daphne Rosalis	Room Host (PM1) (1:00 - 3:00PM)	Harbor	daphne.rosalis@pmi-oc.org
10	Darren McNeil	Venue Logistics	All rooms	darren.mcneil@pmi-oc.org

Google Drive - Share documents

Name ↑	Owner
📁 0_Charter	👤 me
📁 1_Director	Ⓡ Rachel Stafford
📁 2_Event Coordinator	👤 me
📁 3_Marketing Coordinator	👤 me
📁 4_Speaker Coordinator	👤 me
📁 5_Sponsor Coordinator	👤 me
📁 6_Attendees	👤 me
📁 7_PDD Program	Sabrina Adewumi
📁 8_Retrospective Notes	Kerianne Waldrop

PDD Project Plan (Excel)

WBS NUMBER	TASK TITLE
1	**Vazi/Kristie (PPD Director)**
1.1	Develop Charter
1.2	Book Venue
1.3	Finalize The conference theme
1.4	Form Initial event team
1.5	Track subjects determined
2	**Keynote Speaker Coordinator**
2.1	Identify Keynote Speaker
2.3	Contact Keynote Speaker
2.5	Keynote Speaker Contract Signed
3	**Track Speaker Coordinator**
3.1	Identify Potential track speakers
3.2	Contact Track speakers
3.3	Track Speakers Contract Signed
4	**Sponsor Coordinator**
4.1	Identify Sponsors
4.2	Contact Sponsors
4.3	Sponsors Contract Signed
4.4	PPT Review & Finalize
5	**Marketing Coordinator**
5.1	Create Sponsorship Package
5.2	Update Event website
5.3	Marketing Campaign

Timeline columns:

| Apr 2023				May 2023					Jun 2023				Jul 2023				Aug 2023					Sep 2023				Oct 2023				
1	2	3	4	1	2	3	4	5	1	2	3	4	1	2	3	4	1	2	3	4	5	1	2	3	4	1	2	3	4	5
2-8	9-15	16-22	23-29	30-6	7-13	14-20	21-27	28-3	4-10	11-17	18-24	25-30	2-8	9-15	16-22	23-29	30-5	6-12	13-19	20-26	27-2	3-9	10-16	17-23	24-30	1-7	8-14	15-21	22-28	29-4

PDD Project Plan (ProjectInsight.net – 189 Tasks)

Nu...	Name	Durat...	Work Hours	% Comp	% Comp Ch...	Work Status	Start Date	End Date	Resources
1	▷ Project Initiation	178d	10.00	100.00%		Done	Mon 4/17/23 8 AM	Thu 12/21/23 8 AM	Vazi Okhandiar
7	▷ Project Planning	228d	0.00	100.00%		Done	Mon 4/17/23 8 AM	Fri 3/1/24 5 PM	Rachel Stafford
11	▷ Marketing	139d	0.00	100.00%		Done	Tue 8/15/23 8 AM	Tue 2/27/24 5 PM	Ramin Shandi
23	▷ Speakers	308d	12.00	100.00%		Done	Mon 1/2/23 8 AM	Fri 3/8/24 5 PM	Laleh Abedinzadeh
42	▷ Attendees	139d	0.00	100.00%		Done	Tue 8/15/23 8 AM	Tue 2/27/24 5 PM	Ramin Shandi
49	▷ Sponsorships & Exhibitors	299d	4.00	100.00%		Done	Mon 1/2/23 8 AM	Mon 2/26/24 5 PM	Marion Echeniqu...
57	▷ Volunteers	40d	0.00	100.00%		Done	Tue 1/2/24 8 AM	Tue 2/27/24 5 PM	Rohini Nair
62	▷ Printing Work	35d	16.00	100.00%		Done	Mon 1/8/24 8 AM	Mon 2/26/24 5 PM	Rohini Nair
69	▷ Venue	75d	0.00	100.00%		Done	Wed 11/15/23 8 AM	Thu 2/29/24 5 PM	
71	▷ Day of Event Logistics	39d	8.00	100.00%		Done	Tue 1/2/24 8 AM	Mon 2/26/24 5 PM	Rohini Nair
188	◢ PDD 2024 Closeout Activities	16d	0.00	100.00%		Done	Mon 2/26/24 8 AM	Mon 3/18/24 5 PM	Vazi Okhandiar
189	Conference Debrief & Lessons Learned	16d		100.00%	✅	Done	Mon 2/26/24 8 AM	Mon 3/18/24 5 PM	Vazi Okhandiar

Event Execution
Day of the Event
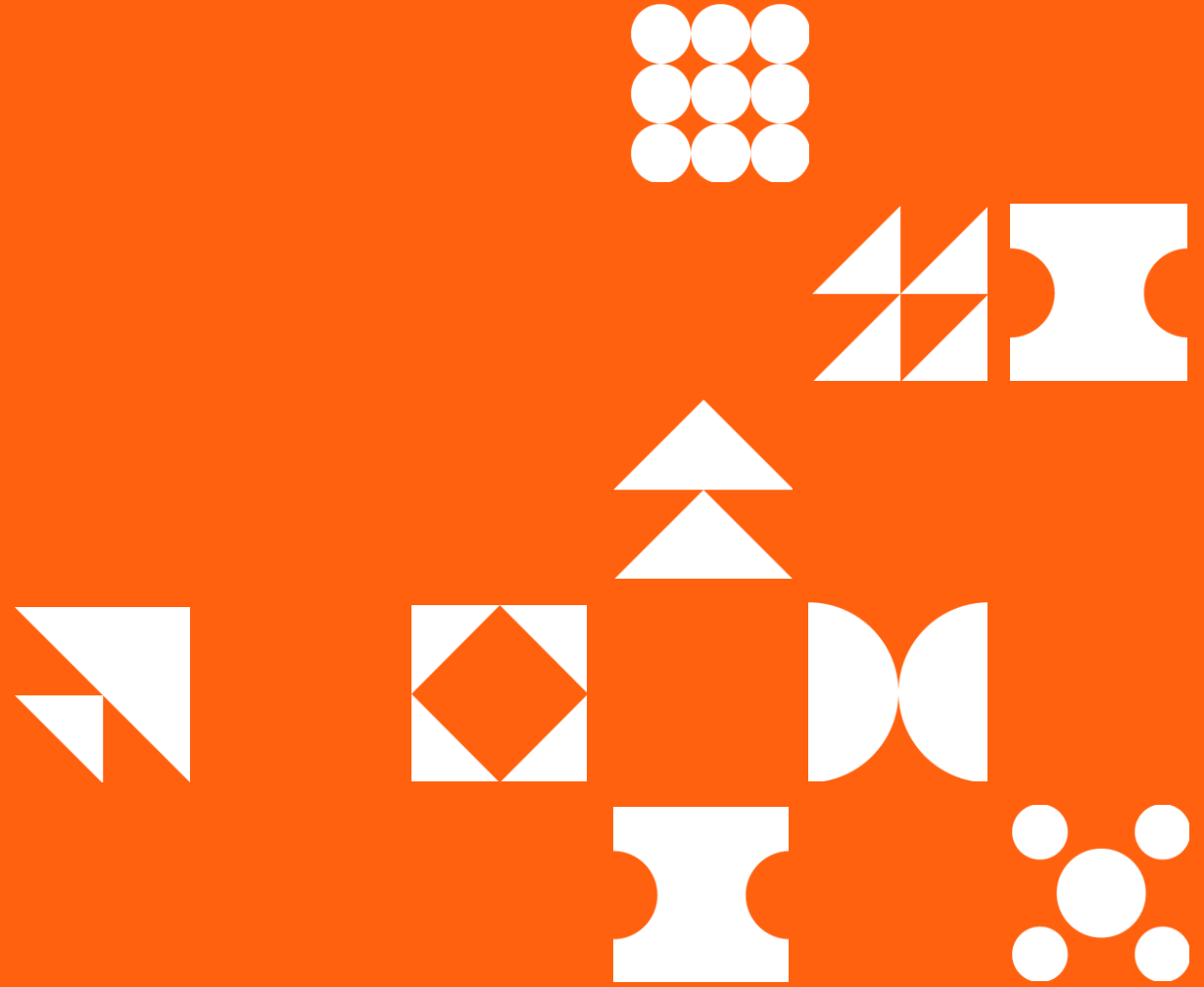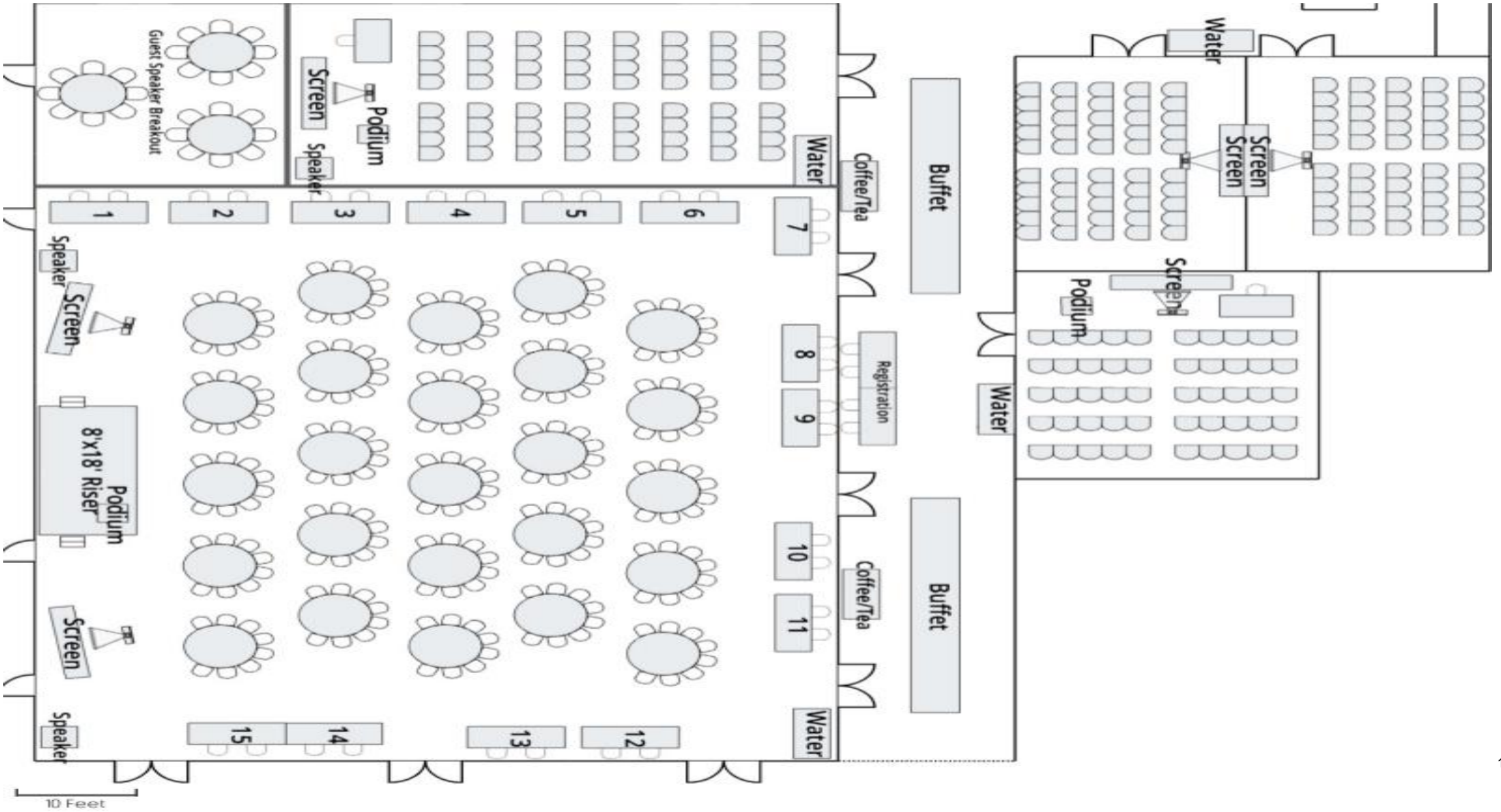
Keynote Speakers	Tracks	Speakers	Attendees
2	4	24	180

PM Book Authors

5

1. Ray Frohnhoefer - "Accidental Project Manager"
Link: https://www.amazon.com/Accidental-Project-Manager-Zero-Hero/dp/171879293X

2. Steven Haines - "Business Acumen for Project Managers"
Link: https://www.amazon.com/Business-Acumen-Project-Managers-Everything-ebook/dp/B0CPNZ6Y2X

3. Sam Drauschak - "Becoming A Conscious Business"
Link: https://www.amazon.com/Becoming-Conscious-Business-Through-Science-ebook/dp/B07DS1STDD

4. Mike Bissonette - "Project Risk Management: A Practical Implementation Approach"
Link: https://www.amazon.com/Project-Risk-Management-Practical-Implementation/dp/1628251158

5. David Shostak - "Project Management in the Real World…Explaining all the nonsense about Project Management in Plain English" link: https://www.amazon.com/Project-Management-Real-World-Explaining-ebook/dp/B079KH9NS8
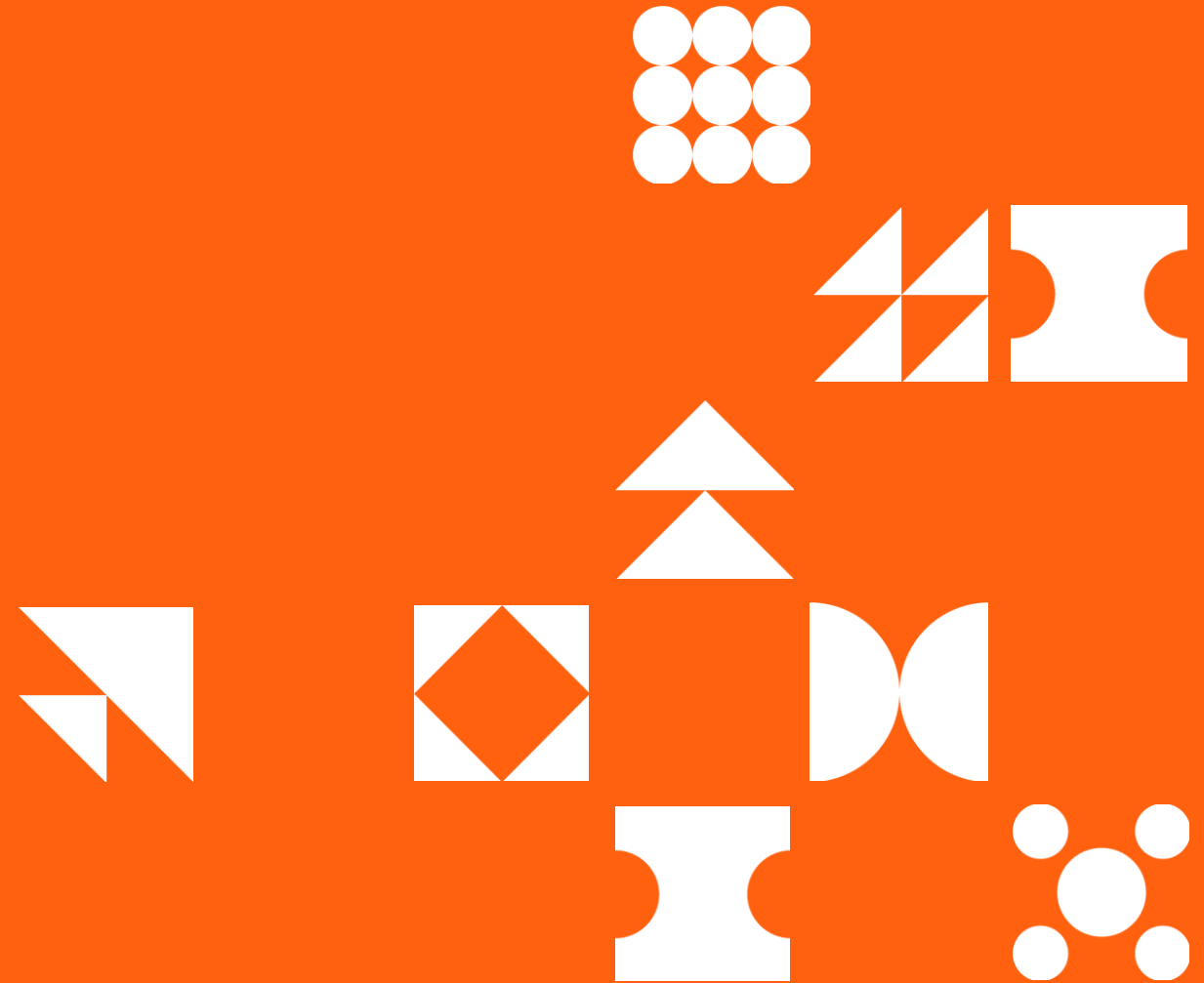
PDD Event

Assets
- PDD Project Plan
- PDD Sponsorship Package
- PDD website
- Speaker List
- Sponsor List
- Shared folder with PDD Templates
    - Speaker Email
    - Vendor/Sponsorship Email
    - Social media

Tools used
- Google Drive for sharing documents
- Project Insight for managing project
- Canva for artwork
- Slack channel for team communication.

Lesson Learned

Things that went GREAT!

Hot lunch was great.

Once QR code worked, it was easy to submit info.

Volunteers were very supportive.

Enjoyed Raffle and Networking Happy Hour.

Keynote and featured presentation was great

Program looked amazing

Venue was great.

Discussions and presentations were engaging

Signage was impressive

Things that could be better next time.

Vegan/ Vegetarian Menu options

Sponsor engagement could improve.

Display system and laptops did not work well

Problem with rooms with no PDU, less attendance

Need MS Office license on all laptops.

Establish the app that scans the attendees bar code for a respective session and auto submits their PDU.

Lack of collaboration with other PMI-OC teams

Parking was tough.

People wanted more printed programs

QR codes did not work in some rooms

Longer breaks in-between sessions.

Limited time for attendees to interact with sponsors

Volunteer check-in separately

Ensure that all team members are included on the event program.

Set a lead volunteer for each room to lead rotating volunteers.

Volunteers were added late/ weren't present at walk-through

Suggestions

Have volunteers go to a separate area for check-in so specifics can be communicated.

Have formal networking sessions during the day.

More training for volunteers, or mix experienced ones with non-experienced.

Check the audio-visual system before hand

Prepare the QR codes at least 1 week before the event and be ready for any obstacles

Use conference scheduling app (e.g. Sched.com) to manage event so attendees can select their sessions and plan their day

Sponsorship Package (similar to brochure) to capture benefits of sponsorship

Have MC give session reminders during breaks

Conduct a complete rehearsal with all volunteers prior to day of event.

Establish PDD team combined from other chapter teams to pull on expertise (e.g. dinner team, digital media, sponsorship)

Detailed marketing plan established in advance

Thank You

Vazi Okhandiar | vp.programs@pmi-oc.org
PMI Orange County | pmi-oc.org

How to obtain PDUs for this session:

1. Scan this QR code to the Mentimeter Survey
2. Enter Your Name
3. Complete the Presentation Evaluation

If you are having issues with scanning the QR code, then either use the URL listed below or see the session facilitator or registration desk for assistance.

URL: https://bit.ly/4dvUfnP

Project Management Institute. Rio Grande