

Project Management

ABSOLUTE BEGINNER'S GUIDE

No experience necessary!



Third Edition

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Gregory M. Horine

Project Management

Third Edition

**ABSOLUTE
BEGINNER'S
GUIDE**



Gregory M. Horine

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800 East 96th Street,
Indianapolis, Indiana 46240

Project Management Absolute Beginner's Guide, Third Edition

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About the Author

Gregory M. Horine is a certified (PMP, CCP) business technology and IT project management professional with more than 23 years of successful results across multiple industries using servant leadership principles. Primary areas of expertise and strength include the following:

- Project management and leadership
- Complete project lifecycle experience
- Regulatory and process compliance
- Package implementation and integration
- Quality and risk management
- Enterprise solution development
- Effective use of project management tools
- Microsoft Project
- Project and portfolio management tools
- Complex application development
- Data analysis and transformation
- Business process analysis and improvement
- Vendor and procurement management
- Mind mapping tools

In addition, Mr. Horine holds a master's degree in computer science from Ball State University and a bachelor's degree in both marketing and computer science from Anderson College (Anderson, Indiana).

Through his "servant leadership" approach, Mr. Horine has established a track record of empowering his teammates, improving project communications, overcoming technical and political obstacles, and successfully completing projects that meet the targeted objectives.

Mr. Horine is grateful for the guidance and the opportunities that he has received from many mentors throughout his career. Their patience and influence has helped form a rewarding career marked by continuous learning and improvement.

When not engaged in professional endeavors, Mr. Horine hones his project management skills at home with his lovely wife, Mayme, and his five incredible children: Michael, Victoria, Alex, Luke, and Elayna.

Dedication

This book is dedicated to the “students” that I constantly visualized in my mind as I developed this book—the bright and caring family that surround my life, including my wife, parents, siblings, in-laws, aunts, uncles, cousins, and grandparents.

This book is also dedicated to the parents, families, practitioners, and researchers who are diligently fighting to rescue children from autism spectrum and bipolar disorders.

This book is dedicated to my key inspirational sources: my incredible wife, Mayme (I still wake up everyday with a smile in my heart knowing I am married to her), and my “fabulous five” children: Michael, Victoria, Alex, Luke, and Elayna (each one is a hero to me).

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We Want to Hear from You!

As the reader of this book, you are our most important critic and commentator. We value your opinion and want to know what we're doing right, what we could do better, what areas you'd like to see us publish in, and any other words of wisdom you're willing to pass our way.

We welcome your comments. You can email or write us directly to let us know what you did or didn't like about this book—as well as what we can do to make our books better.

Please note that we cannot help you with technical problems related to the topic of this book.

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INTRODUCTION



As organizations continue to move toward “project-based” management to get more done with fewer resources—and as the demand for effective project managers continues to grow—more and more individuals find themselves with the opportunity to manage projects for the first time.

In an ideal world, every new project manager candidate would complete certified project management training programs and serve as an apprentice before starting his first project manager opportunity, but...this is the real world. In many cases, a quicker, more accessible, and more economical alternative is needed to guide these candidates in managing projects successfully the first time.

The *Absolute Beginner’s Guide to Project Management*, Third Edition, is intended to provide this alternative in a helpful, fun, and practical style.

About This Book

The objectives of this book include the following:

- To be a pragmatic guide that prepares a new project manager for the “real world.”
- To be an easy-to-use tutorial and reference for any person managing her first project(s).
- To teach the key concepts and fundamentals behind project management techniques. When you understand these, you can apply them effectively independent of toolset, environment, or industry.
- To reduce the on-the-job learning curve by sharing the traits of successful projects and “lessons learned” from less-than-successful projects.
- To balance the breadth of topics covered with adequate depth in specific areas to best prepare a new project manager.
- To review the skills and qualities of effective project managers.
- To emphasize the importance of project “leadership” versus just project “management.”

Consistent with the *Absolute Beginner's Guide* series, this book uses a teaching style to review the essential techniques and skills needed to successfully manage a project. By teaching style, I intend the following:

- A mentoring, coaching style that is fun, easy to read, and practical.
- Assumes that the reader does not have previous hands-on experience with project management.
- Teaches the material as if an instructor were physically present.
- Presents the material in task-oriented, logically ordered, self-contained lessons (chapters) that can be read and comprehended in a short period of time (15 to 30 minutes).
- Emphasizes understanding the principle behind the technique or practice.
- Teaches the material independent of specific tools and methodologies.
- Teaches the material with the assumption that the reader does not have access to organizational templates or methodologies.
- Provides a summary map of the main ideas covered at the end of each chapter. Research has shown that this type of “mind-map” approach can drive better memory recollection when compared to traditional linear summary approaches.

OUT-OF-SCOPE

The scope of this book is clearly outlined in the table of contents, but as I will cover later, it is always good to review what is out of scope to ensure understanding of the scope boundaries. Because the field of project management is extremely broad, and we needed to draw the line somewhere, this book focuses on the proper management of a single project. As a result, the following advanced project management subjects are not covered in this book:

- Program management
- Enterprise portfolio management
- Enterprise resource management
- Advanced project risk management topics
- Advanced project quality management topics
- Advanced project procurement management topics

DISCLAIMER

Although there are definitely concepts, fundamentals, and techniques covered in this book that are of enormous assistance to anyone taking the PMP certification exam, this book is not intended to be an exam preparation guide.

The focus is not on theory, academia, or the PMBOK® (PMI's *A Guide to the Project Management Body of Knowledge*, Fourth Edition). The focus is on getting the first-timer ready to manage his first project in the real-world environment.

Although the PMBOK is admirable industry standard, it is updated every four years to better capture the evolving knowledge in the field and to improve the consistency and clarity of the standards. It is not intended to be a "how-to" guide for a first-time practitioner.

Who Should Read This Book?

The *Absolute Beginner's Guide to Project Management*, Third Edition is recommended for any person who fits into one or more of the following categories:

- Individuals unsatisfied with other introductory project management books
- Individuals new to project management, such as
 - Technologists
 - Knowledge workers
 - Students
 - Functional managers
- Professionals taking a first project management assignment, such as
 - Team leaders
 - Project coordinators
 - Project administrators
 - Project support
 - Functional managers
- Experienced project managers needing a refresher course
- Experienced project managers with limited formal project management education

How This Book Is Organized

This book has been divided into five parts:

- Part I, "Project Management Jumpstart," sets up the general framework for our project management discussion and accelerates your project management learning curve, including an insightful review of successful projects and project managers.
- Part II, "Project Planning," reviews the processes that establish the foundation for your project.
- Part III, "Project Control," reviews the processes that allow you to effectively monitor, track, correct, and protect your project's performance.

- Part IV, “Project Execution,” reviews the key leadership and people-focused skills that you need to meet today’s business demands.
- Part V, “Accelerating the Learning Curve...Even More,” provides experienced insights and tips on making better use of Microsoft Project, including the “game-changing” new features of Microsoft Project 2010, and managing specific real-life project situations. It also covers many hot project management topics to further accelerate the knowledge base and skill level of the new project manager.

Conventions Used in This Book

Throughout the book, I use the following conventions and special features:

- At the beginning of each chapter, you find a quick overview of the major topics that are expounded upon as you read through the material that follows.
- The end of each chapter provides a list of key points along with a visual summary map.
- You also find several special sidebars used throughout this book:



NOTE These highlight specific learning points or provide supporting information to the current topic.



TIP These highlight specific techniques or recommendations that could be helpful to most project managers.



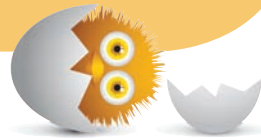
CAUTION These highlight specific warnings that a project manager should be aware of.

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IN THIS CHAPTER

- Clarify what project management is and “is not” (it’s likely more than you think)
- Learn why projects are challenging to manage
- Understand why project management is the key to the future growth of any organization
- Learn why the future of project management is bright and why becoming a certified project manager might be a wise career move
- Review the latest trends in project management that might impact your first opportunity

1



PROJECT MANAGEMENT OVERVIEW

Since your perceptions surrounding project management will vary depending on work experiences, education, industry, and roles, it’s important to establish some “common ground” before we venture down the road of learning what a project manager must do to be successful in his first opportunity.

This chapter provides the common ground by clarifying what constitutes project management and why project management is important to both your future and the future of your organization.

What Is Project Management...Exactly?

If you are like most people, you are “pretty sure” you know what projects are, and you “think” you know what project management is (and what a project manager does), but there’s always a varying amount of uncertainty in those perceptions. So, let’s start off by clarifying some key concepts.

Project management is simply the process of managing projects (and you thought this was going to be difficult). Although this definition is not particularly helpful, it does illustrate three key points:

- Project management is not “brain surgery.” Yes, it covers a vast array of subjects, processes, skills, and tools, but the key fundamentals of project management are straightforward and are consistent across industries.
- To better understand project management, we need to understand what a project is. The nature of a project provides insights into the scope and challenges of project management.
- To better understand project management, we need to understand what is implied by the term *managing* and how this compares against traditional business management.

What Is a Project Exactly?

A *project* is the work performed by an organization one time to produce a unique outcome. By *one time*, we mean the work has a definite beginning and a definite end, and by *unique*, we mean the work result is different in one or more ways from anything the organization has produced before. Examples of projects include the following:

- Building a new house
- Developing a new software application
- Performing an assessment of current manufacturing processes
- Creating a new radio commercial

This is in contrast to the operations of an organization. The operational work is the ongoing, repetitive set of activities that sustain the organization. Examples of ongoing operations include the following:

- Processing customer orders
- Performing accounts receivable and accounts payable activities
- Executing daily manufacturing orders

To further explain the nature of projects (and project management) and how they compare to the ongoing operations of an organization, please review the summary in Table 1.1.

TABLE 1.1 Comparing Projects and Operations

Feature	Projects	Operations
Key Similarities	Planned, executed, and controlled Performed by people Resource constrained	Planned, executed, and controlled Performed by people Resource constrained
Purpose	Attain objectives and terminate	Sustain the organization
Time	Temporary Definite beginning and end points	Ongoing
Outcome	Unique product, service, or result	Non-unique product, service, or result
People	Dynamic, temporary teams formed to meet project needs Generally not aligned with organizational structure	Functional teams generally aligned with organizational structure
Authority of Manager	Varies by organizational structure Generally minimal, if any, direct line authority	Generally formal, direct line authority



NOTE The Project Management Institute (PMI) definition of *project* is a temporary endeavor to produce a unique product or service.

After reviewing this comparison, you are beginning to see the inherent challenges involved with project management. Projects are less predictable and are constantly impacted by the dynamic, uncertain nature of most organizational environments. We will detail the typical challenges later in this chapter. For now, let's better define project management.

Managing Projects

What do we mean when we say “managing projects”?

- We mean applying both the science and art to planning, organizing, implementing, leading, and controlling the work of a project to meet the goals and objectives of the organization.
- We mean the process of defining a project, developing a plan, executing the plan, monitoring progress against the plan, overcoming obstacles, managing risks, and taking corrective actions.
- We mean the process of managing the competing demands and trade-offs between the desired results of the project (scope, performance, quality) and the natural constraints of the project (time and cost).



NOTE The PMI definition of *project management* is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements.

- We mean the process of leading a team that has never worked together before to accomplish something that has never been done before in a given amount of time with a limited amount of money.

Sounds like fun, doesn't it? We will explain each of these key aspects of project management in subsequent chapters, and we will discuss many of the specific tasks and responsibilities performed by the project manager in Chapter 2, “The Project Manager,” but for now we just want to align our general understanding of project management.

An Academic Look

To further assist this alignment process, let's look at project management from a more academic level. PMI, the globally recognized standards organization for project management (www.pmi.org), defines project management as a set of five process groups (see Table 1.2) and nine knowledge areas (see Table 1.3). These references are taken from the PMI's *A Guide to the Project Management Body of Knowledge*, Fourth Edition (*PMBOK® Guide – Fourth Edition*).

TABLE 1.2 Description of Project Management Process Groups

#	Process Group	Description per <i>PMBOK Guide – Fourth Edition</i>	Common Terms
1	Initiating	Authorizing the project or phase.	“preliminary planning” “kicking off”
2	Planning	Defining and refining objectives of the project and selecting the best course of action to attain those objectives.	“defining” “developing the plan” “setting the stage”
3	Executing	Coordinating the people and resources to implement the plan.	“making it happen” “getting it done” “coordinating”
4	Controlling	Ensuring project objectives are met by monitoring and measuring progress regularly to identify variances from the plan so that corrective actions can be taken.	“tracking progress” “keeping on course”
5	Closing	Formalizing acceptance of project or phase and bringing to an orderly end.	“client acceptance” “transition” “closeout”

Figure 1.1 summarizes the relationships among the project management process groups, which is based on *PMBOK Guide – Third Edition* (Figure 3-2, page 40).

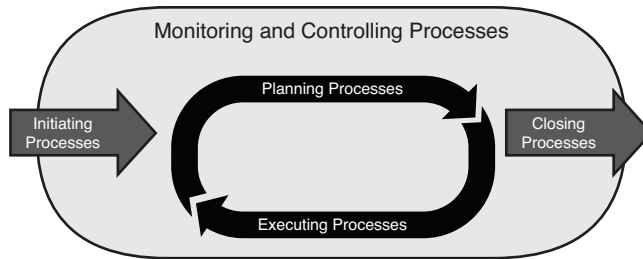


FIGURE 1.1

Project management process relationships.

TABLE 1.3 Description of PMBOK Knowledge Areas

#	Knowledge Area	Description per <i>PMBOK Guide – Fourth Edition</i>	Common Deliverables
1	Project Integration Management	Processes required to ensure the elements of the project are properly coordinated.	Project Charter Project Plan Change Requests Work Results
2	Project Scope Management	Processes required to ensure that project includes all the work that is required and only the work that is required to complete the project successfully.	Scope Statement Work Breakdown Structure Formal Acceptance
3	Project Time Management	Processes required to ensure timely completion of the project.	Network Diagram Task Estimates Project Schedule
4	Project Cost Management	Processes required to ensure the project is completed within the approved budget.	Resource Requirements Cost Estimates Project Budget
5	Project Quality Management	Processes required to ensure the project will satisfy the needs for which it was undertaken.	Quality Management Plan Checklists Quality Reviews
6	Project Human Resources Management	Processes required to make the most effective use of the people involved with the project.	Role and Responsibility Matrix Organization Chart Performance Evaluations
7	Project Communications Management	Processes required to ensure the timely and appropriate generation, collection, dissemination, storage, and ultimate disposition of project information.	Communication Plan Status Reports Presentations Lessons Learned
8	Project Risk Management	Processes concerned with identifying, analyzing, and responding to project risk.	Risk Management Plan Risk Response Plan Risk Log
9	Project Procurement Management	Processes required to acquire goods and services outside the performing organization.	Procurement Plan Statement of Work Proposals Contracts



NOTE *PMBOK Guide – Fourth Edition* was officially released on December 31, 2008. Consistent with PMI's plan to issue an update every four years, the Fifth Edition is expected out before the end of 2012.



NOTE Project management is a broad field with great potential for specialized and in-depth study. There are entire books and training classes focused solely on advanced analysis of individual process groups and knowledge areas.

Again, depending on your experiences, you might not have realized that project management consisted of all this, and you might not actually perform all these activities as a project manager in your organization. However, it is important and helpful to understand how big your playing field is when learning something new. This book will not completely educate you on each of these process groups nor each of the nine knowledge areas, but it will provide you with the knowledge, essential tools, and “real-world” insights to improve your effectiveness on your first project management assignment.

What Is the Value of Project Management?

As the organizational operating environment continues to become more global, more competitive, and more demanding, organizations must adapt. They must become more efficient, more productive—they must “do more with less.” They must continually innovate. They must respond rapidly to a fast-changing environment. *How can they do this? How can they do this in a strategic manner? How can they do this and still have the proper management controls?* They can do this with effective project management. The strategic value points that effective project management can offer an organization include, but are not limited by, the following:

- Provide a controlled way to rapidly respond to changing market conditions and new strategic opportunities
- Maximize the innovative and creative capabilities of the organization by creating environments of focus and open communication
- Enable organizations to accomplish more with less costs
- Enable better leverage of both internal and external expertise
- Provide key information and visibility on project metrics to enable better decision-making management
- Increase the pace and level of stakeholder acceptance for any strategic change
- Reduce financial losses by “killing off” poor project investments early in their life cycles



NOTE *Stakeholder* is the term used to describe individuals and organizations who are actively involved in the project or whose interests might be impacted by the execution or completion of the project.

In addition to providing apparent value to any organization, project management also offers tremendous value to each of us as individuals. At a personal level, the value of effective project management:

- Ensures that our work is put to the best use for the organization and properly recognized
- Provides a career path that offers unique, challenging opportunities on each new project
- Provides a career path that requires all our abilities and knowledge, including our management, business, people, and technical skills
- Provides a career path that is high in demand, and, generally, offers an increase in income
- Provides a career path that prepares you for organizational leadership positions
- Provides a career path that is recognized more each year as excellent preparation for CxO positions (as more CxO positions are filled by individuals with project management experience)
- Provides a career path that enables you to be on the front lines of strategic organizational initiatives and have major impact on the organization's future

Why Are Projects Challenging?

From what we've covered so far, from your own experiences, or from your reading of trade publications, you likely have some appreciation for the difficulty of completing a successful project. Although I address many common challenges in more detail throughout this book, let's review the key reasons why projects are challenging to manage:

- **Uncharted territory**—Each project is unique. The work to be done has likely never been done before by this group of people in this particular environment.
- **Multiple expectations**—Each project has multiple stakeholders that each have their own needs and expectations for the project.

- **Communication obstacles**—Due to natural organizational boundaries, communication channels, and team development stages, communication of project information must be proactively managed to ensure proper flow.
- **Balancing the competing demands**—Every project is defined to produce one or more deliverables (scope) within a defined time period (time), under an approved budget (cost) with a specified set of resources. In addition, the deliverables must achieve a certain performance level (quality) and meet the approval of the key stakeholders (expectations). Each of these factors can affect the others, as Figure 1.2 illustrates. For example, if additional functionality (scope, quality) is desired, the time and cost (resources needed) of the project will increase. This is a key focus of an effective project manager.



NOTE The competing project demands are often referred to as the *triple constraint of project management*. Time and Cost (or Resources) are always two sides of the triangle. Depending on where you look, the third side is either Scope, Performance, or Quality. In either case, it's the “output” of the project. Additionally, many recent variations of this model have included the additional demand of Client Expectations.

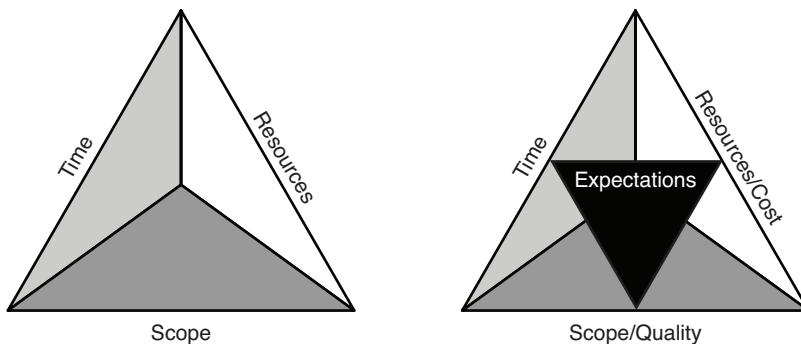


FIGURE 1.2

Competing project demands (traditional model on left, modern model on right), summarizing the relationships between the natural competing demands of projects.

- **Cutting edge**—Often, projects have a strategic, innovative focus. As a result, they often deal with new, leading-edge technologies. In these cases, the project has more risks, more unknowns, and is much more difficult to estimate accurately.

- **Organizational impacts**—In addition to overcoming natural communication obstacles created by the project structure, the project manager must also manage overlaps in organizational approval and authority domains, contend with competing priorities for shared resources, deal with annual budget cycles that might not be aligned with the project's funding needs, and ensure that the project is aligned with the focus of the organization.
- **Collaboration**—Depending on the strategic level and scope of your project, your project team will consist of stakeholders across the organization from different functional areas that are likely not accustomed to working together. For project success, these different stakeholders must learn to work together and to understand the others' perspectives to make the best decisions for the project. Often, the project manager plays a key facilitating role in this collaboration process.
- **Estimating the work**—Estimating project work is difficult, yet the time and cost dimensions of the project are built upon these work effort estimates. Given the facts that the work of the project is often unique (never been done before at all, never been done with these tools, and never been done by these people), and most organizations do not maintain accurate historical records on previous projects (that might have similar work components), it is difficult to accurately estimate the effort for individual work items, not to mention the entire project. For the entire project, you need to anticipate the quantity and severity of the issues and obstacles that are likely to surface. We'll cover this in more detail in Chapters 7, "Estimating the Work," and 14, "Managing Project Risks."

Growing Demand for Effective Project Managers

With the value that project management offers any organization, it is easy to understand why more and more industries are adopting project management as the way to do business. As a result, if you check nearly any recent hiring survey or "hot" careers forecast, you will find project management near the top of this list.

With the business trends of global competition and increased worker productivity continuing for the foreseeable future, the demand for successful project managers will only increase. Even in industries and organizations that are experiencing staff reductions, the individuals who have the knowledge, the people skills, and the management competence to solve problems and get projects done are the individuals most valued and retained by the parent organization.

In addition, many organizations have either compliance or competitive drivers requiring them to make process improvements to meet process standards set forth by acts of Congress (Sarbanes-Oxley act), government agencies (such as the Food and Drug Administration or Environmental Protection Agency), industry standards bodies (such as the International Organization for Standards), or industry process models (such as Six Sigma Quality Model or the Capability Maturity Model Integration for software engineering or project management). In all these cases, effective project management is a requirement to ensure these process improvements are made, sustained, and can be repeated.

As the demand for effective project managers continues to grow and organizations continue to experience varying degrees of success with project management, more organizations are requiring their project managers to be certified. Specifically, they are requesting PMI's Project Management Professional (PMP) certification. Much like a master's of business administration (M.B.A.) degree does not guarantee a person can run a profitable, growing business, the PMP certification does not guarantee a person can successfully manage a project. However, it does provide assurance that the individual does have a baseline level of knowledge and experience, and it does indicate that the person takes her profession seriously.

Trends in Project Management

In addition to the focus on organizational process improvements, there are other trends in business and project management that a first-time project manager is likely to encounter (that he might not have just a decade or less ago):

- **Managing vendors**—With the increased outsourcing of non-core activities, more projects leverage one or more vendors (suppliers) to get work done. More on this is explained in Chapter 21, “Managing Vendors.”
- **Facilitating a selection process**—To determine which vendors you will partner with to get work done, a selection and evaluation process is normally conducted. More on this is explained in Chapter 24, “When Reality Happens.”
- **Change agent**—Because most projects represent a “change” to business as usual, the project manager is expected to play a key role in leading the stakeholders through the change and acceptance process. More on this in Chapter 16, “Leading a Project,” and Chapter 18, “Managing Expectations.”
- **Servant leadership**—Due to a lack of formal authority, the need to understand the requirements of all stakeholders and the importance of facilitation, collaboration, and managing expectations, there is a growing awareness that a servant leadership style is paramount for effective project management. More on this is explained in Chapter 16.

- **Managing virtual, cross-functional, and multicultural teams**—With the continuous advancements in workgroup and communications tools, the increased integration of processes within an organization, and the continuous drive for increased organizational efficiencies, it is very likely that your project team will consist of members from different physical locations (virtual), different functional departments (cross-functional), or different cultures (multi-cultural, global). More on this is explained in Chapter 20, “Managing Differences,” and in Chapter 17, “Managing Project Communications.”
- **Quality management**—Much like the factors driving the emphasis on risk management, the link between rigorous quality management procedures and improved project management practices continues to strengthen. More on this is explained in Chapter 15, “Managing Project Quality.”
- **Requirements management**—Closely intertwined with managing quality, scope, and stakeholder expectations, the effective definition and the proper management of both a project’s and the product’s requirements are essential to success. More on this is explained in Chapter 18.
- **Facilitating a testing process**—Because it is paramount to verifying stakeholder satisfaction with the focus of the project, the project manager is best positioned to facilitate the testing process. More on this is explained in Chapter 24.
- **Risk management**—Coinciding with the focus on enterprise-wide process improvements and in response to past project experiences, more organizations are placing additional emphasis and formality on their project risk management processes. More on this is explained in Chapter 14.
- **Working with PMOs and corporate governance processes**—If you are working in any type of corporate or multiple business unit environment, you most likely deal with Project Management Office (PMO) or other corporate governance processes. More on this is explained in Chapter 25, “Managing Special Project Situations.”

Additional Resources

In addition to the PMBOK, PMI also provides specific standards documents on the following:

- Program Management
- Portfolio Management
- Organizational Project Management Maturity Management (OPM3)

- Earned Value Management
- Project Risk Management
- Project Estimating
- Work Breakdown Structures
- Scheduling
- Project Configuration Management
- Project Management Competency
- Construction—Project Management
- Government—Project Management

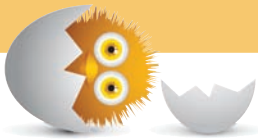
In addition, I recommend the following online resources for insightful articles on project management:

- www.pmi.org
- www.gantthead.com
- www.niwotridge.com
- www.maxwideman.com/pmglossary
- <http://projectmanagement.ittoolbox.com>
- www.pmforum.org
- www.pmousa.com
- www.cio.com
- www.tacticalprojectmanagement.com

THE ABSOLUTE MINIMUM

At this point, you should have a high-level understanding of the following:

- The elements of project management
- The common challenges of managing projects
- The value of effective project management to an organization.
- The merits of project management as a career choice
- The latest business and project management trends that might impact your first opportunity



The map in Figure 1.3 summarizes the main points we reviewed in this chapter.

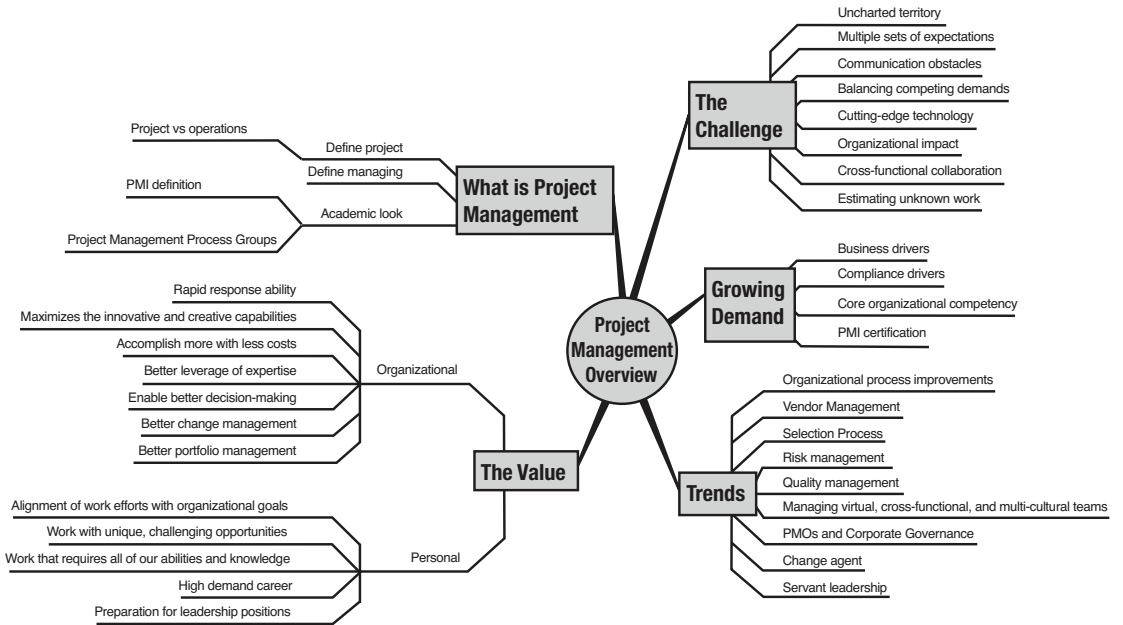


FIGURE 1.3

Project management overview.

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IN THIS CHAPTER

- Review the different roles played by the project manager
- Review the key skills every project manager should possess
- Learn why some project managers are much more successful than others
- Understand the common mistakes made by many project managers

2



THE PROJECT MANAGER

As we reviewed in Chapter 1, “Project Management Overview,” the project manager has many activities to perform, challenges to overcome, and responsibilities to uphold over the life of a project. Depending on your individual experiences, your industry background, and the manner in which project management has been implemented, this review might have been quite enlightening to you.

To ensure that we have a common understanding on what a project manager does, in this chapter I review the different roles a project manager plays over the life of a project, and I discuss the prerequisite skills that you need to perform those roles. Most importantly, I accelerate your learning curve by sharing the characteristics of successful project managers and the common mistakes made by many others.

One Title, Many Roles

You've likely heard many of the analogies before to describe the role of project manager—the "captain" of the ship, the "conductor" of the orchestra, the "coach" of the team, the "catalyst" of the engine, and so on. There's truth and insight in each of the analogies, but each can be incomplete as well. To gain better understanding of what a project manager does, let's briefly discuss each of the key roles played by the project manager:

- **Planner**—Ensures that the project is defined properly and completely for success, all stakeholders are engaged, work effort approach is determined, required resources are available when needed, and processes are in place to properly execute and control the project.
- **Organizer**—Using work breakdown, estimating, and scheduling techniques, determines the complete work effort for the project, the proper sequence of the work activities, when the work will be accomplished, who will do the work, and how much the work will cost.
- **Point Man**—Serves as the central point-of-contact for all oral and written project communications.
- **Quartermaster**—Ensures the project has the resources, materials, and facilities its needs when it needs it.
- **Facilitator**—Ensures that stakeholders and team members who come from different perspectives understand each other and work together to accomplish the project goals.
- **Persuader**—Gains agreement from the stakeholders on project definition, success criteria, and approach; manages stakeholder expectations throughout the project while managing the competing demands of time, cost, and quality; and gains agreement on resource decisions and issue resolution action steps.
- **Problem Solver**—Utilizes root-cause analysis process experience, prior project experiences, and technical knowledge to resolve unforeseen technical issues and to take any necessary corrective actions.
- **Umbrella**—Works to shield the project team from the politics and "noise" surrounding the project, so they can stay focused and productive.
- **Coach**—Determines and communicates the role each team member plays and the importance of that role to the project success, finds ways to motivate each team member, looks for ways to improve the skills of each team member, and provides constructive and timely feedback on individual performances.

- **Bulldog**—Performs the follow-up to ensure that commitments are maintained, issues are resolved, and action items are completed.
- **Librarian**—Manages all information, communications, and documentation involved in the project.



NOTE Although there is consensus that the disciplines and techniques used in project management can be applied in any industry, there is no consensus on whether individual project managers can be effective in a different industry.

There is no doubt that the more knowledge and experience that a project manager has in the subject matter area of the project, the more value that she can offer. However, depending on the size of the initiative and the team composition, a project manager with different industry experience can bring tremendous value if that person is strong in the other four skill categories discussed here.

- **Insurance Agent**—Continuously works to identify risks and to develop responses to those risk events in advance.
- **Police Officer**—Consistently measures progress against the plan, develops corrective actions, reviews quality of both project processes and project deliverables.
- **Salesman**—An extension of the Persuader and Coach roles, but this role is focused on “selling” the benefits of the project to the organization, serving as a “change agent,” and inspiring team members to meet project goals and overcome project challenges.

Key Skills of Project Managers

Although a broad range of skills is needed to effectively manage the people, process, and technical aspects of any project, it becomes clear there is a set of key skills that each project manager should have. Although these skill categories are not necessarily exclusive of each other, let’s group them into five categories to streamline our review and discussion:

1. **Project Management Fundamentals**—The “science” part of project management, covered in this book, including office productivity suite (such as Microsoft Office, email, and so on) and project management software skills.

- 2. Business Management Skills**—Those skills that would be equally valuable to an “operations” or “line-of-business” manager, such as budgeting, finance, procurement, organizational dynamics, team development, performance management, coaching, and motivation.



TIP Active listening is one of the secret weapons of effective project managers.

- 3. Technical Knowledge**—The knowledge gained from experience and competence in the focal area of the project. With it, you greatly increase your “effectiveness” as a project manager. You have more credibility, and you can ask better questions, validate the estimates and detail plans of team members, help solve technical issues, develop better solutions, and serve more of a leadership role.
- 4. Communication Skills**—Because communication is regarded as the most important project management skill by the Project Management Institute (PMI), I feel it is important to separate these out. Skills included in this category include all written communication skills (correspondence, emails, documents), oral communication skills, facilitation skills, presentation skills, and—the most valuable—active listening. *Active listening* can be defined as “really listening” and the ability to listen with focus, empathy, and the desire to connect with the speaker.



NOTE The specific combination of skills that are required for a project manager to be successful on a given project vary depending on the size and nature of the project. For example, as a general rule, on larger projects, technical knowledge is less important than competence in the other four skill categories.

- 5. Leadership Skills**—This category overlaps with some of the others and focuses on the “attitude” and “mindset” required for project management. However, it also includes key skills such as interpersonal and general people skills, adaptability, flexibility, people management, degree of customer orientation, analytical skills, problem-solving skills, and the ability to keep the “big picture” in mind.

I know, I know...after reading this, you are probably thinking either one or more of the following:

- “You must be kidding! I need to be good in all those areas to manage a project?”

- “Wait! I’ve been on projects before, and I’ve yet to see a project manager who could do all that.”
- “Wait, you must be kidding! If anyone was excellent in all those areas, they’d be a CxO of our company.”

To help answer all these questions, please understand two important observations:

1. Many projects are not successful.
2. You do not need to get an “A” in all these categories to be successful as a project manager.

The key is that the project manager has the right mix of skills to meet the needs of the given project. In addition, a self-assessment against these skill categories enables you to leverage your strengths, compensate for your deficiencies, and focus your self-improvement program.

Qualities of Successful Project Managers

Given the many roles played by a project manager, the broad range of skills needed, and the inherent challenges in successfully delivering a project, we need to find ways to accelerate the learning process. Two key ways to accelerate our learning are understanding the qualities of successful project managers and understanding the common mistakes made by project managers.

Successful project managers do not share personality types, appearances, or sizes, but they do share three important features:

1. They excel in at least two of the five key skill categories (Project Management Fundamentals, Business Management Skills, Technical Knowledge, Communication Skills, Leadership Skills) and are either “good enough” in the other categories or staff their teams to compensate for their deficiencies.
2. They avoid the “common” mistakes described in the next section.
3. They bring a mindset and approach to project management that is best characterized by one or more of the following qualities:
 - **Takes ownership**—Takes responsibility and accountability for the project; leads by example; brings energy and drive to the project; without this attitude, all the skills and techniques in the world will only get you so far.
 - **Savvy**—Understands people and the dynamics of the organization; navigates tricky politics; has the ability to quickly read and diffuse emotionally charged situations; thinks fast on the feet; builds relationships; leverages personal power for benefit of the project.

- **Intensity with a smile**—Balances an assertive, resilient, tenacious, results-oriented focus with a style that makes people want to help; consistently follows up on everything and their resolutions without “annoying” everyone.
- **Eye of the storm**—Demonstrates ability to be the calm eye of the project hurricane; high tolerance for ambiguity; takes the heat from key stakeholders (CxOs, business managers, and project team); exhibits a calm, confident aura when others are showing signs of issue or project stress.
- **Strong customer-service orientation**—Demonstrates ability to see each stakeholder’s perspective; able to provide voice of all key stakeholders (especially the sponsor) to the project team; has strong facilitation and collaboration skills; and has excellent active listening skills.
- **People-focused**—Takes a team-oriented approach; understands that methodology, process, and tools are important, but without quality people it’s very difficult to complete a project successfully.
- **Always keeps “eye on the ball”**—Stays focused on the project goals and objectives. There are many ways to accomplish a given objective, which is especially important to remember when things don’t go as planned.
- **“Controlled passion”**—Balances passion for completing the project objectives with a healthy detached perspective, which enables him to make better decisions, to continue to see all points of view, to better anticipate risks, and to better respond to project issues.
- **Healthy paranoia**—Balances a confident, positive outlook with a realism that assumes nothing, constantly questions, and verifies everything.
- **“Context” understanding**—Understands the context of the project—the priority that your project has among the organization’s portfolio of projects and how it aligns with the overall goals of the organization.
- **Looking for trouble**—Constantly looking and listening for potential risks, issues, or obstacles; confronts doubt head-on; deals with disgruntled users right away; understands that most of these situations are opportunities and can be resolved upfront before they become full-scale crisis points.

15 Common Mistakes of Project Managers

Although we review many of the common errors made in each of the fundamental areas of project management throughout this book (so you can avoid them), understanding the most common project management mistakes helps focus our

efforts and helps us to avoid the same mistakes on our projects. The following are some of the most common mistakes made by project managers:

1. Not clearly understanding how or ensuring that the project is aligned with organizational objectives.
2. Not properly managing stakeholder expectations throughout the project.
3. Not gaining agreement and buy-in on project goals and success criteria from key stakeholders.
4. Not developing a realistic schedule that includes all work efforts, task dependencies, bottom-up estimates, and leveled assigned resources.
5. Not getting buy-in and acceptance on the project schedule.
6. Not clearly deciding and communicating who is responsible for what.
7. Not utilizing change control procedures to manage the scope of the project.
8. Not communicating consistently and effectively with all key stakeholders.
9. Not executing the project plan.
10. Not tackling key risks early in the project.
11. Not proactively identifying risks and developing contingency plans (responses) for those risks.
12. Not obtaining the right resources with the right skills at the right time.
13. Not aggressively pursuing issue resolution.
14. Inadequately defining and managing requirements.
15. Insufficiently managing and leading project team.

THE ABSOLUTE MINIMUM

At this point, you should have a high-level understanding of the following:

- The different roles played by the project manager
- The five key skill areas every project manager should master
- The common qualities of successful project managers
- The common mistakes made by project managers

