

IN THIS CHAPTER

- » Understanding what makes a project a project
- » Seeing what's involved in project management
- » Coming to grips with the Project Manager's role
- » Knowing what it takes to be a successful Project Manager

Chapter **1**

Success in Project Management

Organisations are constantly changing as they keep pace with new market conditions, new financial regulations, new business practices, new legal requirements and new technology. Then there is work such as upgrading or moving premises, installing new facilities, carrying out major maintenance, improving manufacturing processes and re-branding commercial products. A lot of that work is carried out with projects, and as a result people are needed who can manage those projects and manage them well.

Taking on a Project

Because you're reading this book, the chances are that you've been asked to manage a project for the first time or that you're already running projects and are looking to see whether you can find easier and better ways of doing things. If the project is indeed your first one, that's a challenge and may well give you the chance to excel in something you haven't done before; for many, managing a project even opens a door to a new career.

The really good news here, whether you're completely new or have some experience, is that project management has been around for a very long time. In that time, Project Managers have come up with highly effective strategies and a range of very practical techniques. You can benefit from all that experience, and this book takes you through what you need to know. You may be a bit guarded even now because you've heard of, read about or even seen, a lot of project problems and failures. More really good news is that most project failure comes from well-known and avoidable problems; you really don't have to be part of the failure statistics if you manage your project in the right way.

So, hang on tight – you're going to need an effective set of skills and techniques to steer your projects to successful completion. This chapter gets you off to a great start by showing you what projects and project management really are and by helping you separate projects from non-project work. The chapter also gives you some insight into exactly why projects go wrong. That will help you become absolutely determined to do things right and succeed where so many others have failed.



WARNING

This book offers a generic, introductory approach to project management and isn't based on any one method. It describes a structure and techniques that are built into many ways of running projects, but it doesn't cover the procedural detail of those methods. For that, and for help with any accompanying professional exams, you will also need to consult the relevant manuals and exam syllabuses.

Avoiding the Pitfalls

By following a sound approach to the project, you automatically avoid many of the pitfalls that continue to contribute to, or cause, project failure on a mind-boggling scale. You may ask why, if good ways of doing things are out there, people ignore them and then have their projects fail. Good question. People make the same project mistakes repeatedly, and they're largely avoidable. You may have come across the joke by comedian Tommy Cooper:

I went to the doctor and said 'Every time I do this, it hurts.' The doctor said, 'Well, don't do it.'

The following list takes a quick look at the main causes of project failure; you'll find the remedies in later chapters in the book. The list makes for depressing reading, particularly if you recognise some elements in parts of your own organisation. Nevertheless, it gives a good background against which to contrast

successful project management and the approach and techniques set down in this book:

- » **Lack of clear objectives:** Nobody's really sure what the project is about, much less are people agreed on it.
- » **Lack of risk management:** Things go wrong that someone could easily have foreseen and then controlled to some degree, or even prevented.
- » **No senior management 'buy in':** Senior managers were never convinced and so never supported the project, leading to problems such as lack of resource. Neither did those managers exercise effective management oversight (good project governance) as they routinely do in their other areas of responsibility.
- » **Poor planning:** Actually, that's being kind, because often the problem is that no planning was done at all. It's not surprising, then, when things run out of control, and not least because nobody knows where the project should be at this point anyway.
- » **No clear progress milestones:** This follows on from poor planning. The lack of milestones means nobody sees when things are off track, and problems go unnoticed for a long time.
- » **Understated scope:** The scope and the Project Plan are superficial and understate both what the project needs to deliver and the resource needed to deliver it. Project staff (often team members) then discover the hidden but essential components later in the project. The additional work that is necessary then takes the project out of control, causing delay to the original schedule and overspending against the original budget.
- » **Poor communications:** Many projects fail because of communication breakdown, which can stem from unclear roles and responsibilities and from poor senior management attitudes, such as not wanting to hear bad news.
- » **Unrealistic resource levels:** It just isn't possible to do a project of the required scope with such a small amount of resource – staff, money or both.
- » **Unrealistic timescales:** The project just can't deliver by the required time, so it's doomed to failure.
- » **No change control:** People add in things bit by bit – *scope creep*. Then it slowly dawns on everyone that the project's now grown so big that it can't be delivered within the fixed budget or by the set deadline.

That's ten reasons for failure, but you can probably think of a few more. The interesting thing about these problems is that avoiding them is, for the most part, actually not that difficult.

Deciding Whether the Job is a Project

Before you start to think too deeply about how to set up the project, the first thing to do is check whether it really is one. No matter what your job is, you handle lots of work each day: answer customer enquiries, hold a meeting, update the accounts, design a sales campaign or move to new offices. Not all of this work is a project. So what makes something a project?



TIP

Some people say that everything is a project, even making a cup of tea. Don't listen to them. You can think about three things to determine whether a job is a project:

- » Is it a one-off job or something that's ongoing? If the job is ongoing, like producing bars of soap on a production line or taking customer orders, then it's business as usual, not a project.
- » Does the job justify project controls? Project management means incurring some overheads, although you can find advice in this book on how to keep overheads to the minimum. But the fact remains that there will be overheads in a project (such as for planning, approval and control) and some jobs are so small or straightforward that they just don't justify that degree of control.
- » This last one may sound a little weird, and it certainly doesn't fit with the formal definitions; it's the question, 'Do you want to handle the job as a project?' You may choose to deal with a block of work as a project, but I wouldn't – so, in some instances, you have a choice.

Understanding the four control areas

Different project approaches have slightly different definitions of a project; here's one:



TECHNICAL
STUFF

A *project* is a temporary undertaking performed to produce a unique product, service or result.

The 'unique product' is true, but don't let that put you off setting up projects that are effectively repeated, such as organising the annual company conference. Although, strictly speaking, the task is unique each time, you will nevertheless find large areas of commonality with previous projects so you don't need to reinvent the wheel. For example, you can probably adapt last year's plans rather than starting from scratch.

Large or small, projects involve the following four areas of control:

- » **Scope:** What the project will deliver
- » **Time:** When the project will deliver
- » **Quality:** So often forgotten, but an essential control dimension
- » **Resource:** Necessary amounts of staff time, funds and other resources such as equipment and accommodation that the project needs

You need to balance these areas for each project, and you can see immediately why so many projects get into difficulties. You look at a project, think about the four control factors and say to yourself, 'They want that scope, to that quality level, with just that resource and by then? They've got to be joking!' Strangely, organisational managers often commit projects to failure by insisting on unachievable deadlines or unrealistic resources. What's even more strange is that those same managers are then surprised and even angry when the projects inevitably get into difficulties and fail.

Getting the balance right in the early part of the project when you do the main scoping and planning is, obviously enough, essential. Jerry Madden of NASA, the American space agency, produced a great document called 'One Hundred Rules for NASA Project Managers'. Rule 15 is:

The seeds of problems are laid down early. Initial planning is the most vital part of a project. The review of most failed projects or project problems indicate the disasters were well planned to happen from the start.

It's also useful to think about the four areas of control when dealing with change in the project. Chapter 15 includes a 'four dog' model to help you think about the interaction. The four components are the basis of a project's definition for the following reasons:

- » The only reason the project is run is in order to produce the results specified in its scope.
- » The project's end date is often an essential part of defining what constitutes success. In some cases, the project must provide the result by a specified time in order to meet its goal (it's *time-critical*).
- » The quality requirement is a vital part of the balance and may be the most important element, even though many organisational managers are preoccupied with time and cost.
- » The availability of resources can affect which products the project can produce and the timescale in which it can produce them.



WARNING

Quality can be a very important factor, and is sometimes the most important. Unless the project is time-critical, it may be better for the project to deliver slightly late but where everything works properly, than to deliver on time but with lots of faults and problems.

Recognising the diversity of projects

Projects come in a wide assortment of shapes and sizes. For example, projects can:

» Be large or small:

- Building the new Elizabeth Line railway across London at a cost of around £19 billion and taking 13 years to construct.
- Preparing the annual report for the organisation may take you six weeks to complete and may also be a project.

» Involve many people or just you:

- Training all 10,000 of your organisation's sales staff worldwide in the working of a new product is a project.
- Redecorating an office and updating the furniture and equipment is also a project.

» Be defined by a legal contract or by an informal agreement:

- A signed contract between you and a customer that requires you to build a house defines a project.
- An informal agreement by the IT department to install new software in a business area defines a project.

» Be business related or personal:

- Conducting a sales practice review across all of the countries in your international organisation is a project.
- Preparing for a family wedding is also a project – and a very much more pleasant one than the sales practice review.



REMEMBER

No matter what the individual characteristics of your project are, you can use the same four elements of scope, time, quality and resource to think it through.

A PROJECT BY ANY OTHER NAME – JUST ISN'T A PROJECT

People often confuse the following two terms with *project*:

- **Process:** A *process* is a series of routine steps to perform a particular function, such as a procurement process or a budget process. A process isn't a one-time activity that achieves a specific result; instead, it defines *how* you do a particular function every time.
- **Programme:** A *programme* (overseen by a Programme Manager) is a set of projects that need to be coordinated in some way. Perhaps it's a strategic programme to change the whole way the organisation works, or perhaps it's a group of projects with significant interdependencies that all need to be managed so that they finish at the same time. See Chapter 19 for more on programmes.

Understanding the four stages of a project

Every project, whether large or small, goes through a series of stages and this book will follow four. Other approaches may group things slightly differently, and start earlier with an initial idea for a project, but the sequence will still be pretty much the same.



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In this book the successive sections of the project are referred to as *stages*. You may hear the term *phases* used sometimes, particularly in software, but don't be thrown by that because it's just an alternative name.

- » **Starting the project:** This stage involves thinking through the project proposal at a high, 'sketch' level. That includes assessing the business need for the project and its overall characteristics, which will indicate how it should be run. For example, it may be business-critical or very high-risk. You must also give some thought on who should be involved in the project if it goes ahead and check whether those people are available. You'll normally put all of this sketch-level information in a document called an *Outline Charter* (or just *Outline* for short), or your organisation may refer to it as a *Project Brief*. The stage will end with agreeing, or maybe not, to go on to the next stage and prepare a detailed Project Plan.
- » **The planning stage – organising and preparing:** This stage includes developing a full Project Plan that specifies what the project will deliver, the work to be done and the time, cost and other resources required. Then you'll need to work the Business Case up into full detail from the sketch version you

prepared for the Outline. There will be other plans too, such as for how you will control risks and how you will manage stakeholders. You'll normally produce two main planning documents in this stage. There's the Project Charter which covers the strategic parts of the project such as the Business Case, and the PMP (Project Management Plan) which covers the more tactical things such as the Project Plan, the Risk Plan and the Quality Plan. Then you'll need to produce a more detailed Stage Plan for the first delivery stage so the project can move on smoothly if the Charter and PMP are approved. If this all sounds a lot, don't get too worried and that's for two reasons. First, you need to think things through properly if the project is to run smoothly. Second, in a smaller project especially, these plans may be quite short.

- » **Development stage(s) – carrying out the work:** This stage involves doing the planned work. You'll normally split this up into a sequence of delivery stages, though in a very small project you might opt for having just one. During each delivery stage you'll be monitoring and controlling performance to ensure that things are going to plan, and doing the more detailed planning of successive delivery stages as the project continues. Controls used during the stage may include things like progress checks, progress meetings, risk reports and verifying that the required quality is being achieved. Each stage will finish with a *Stage Gate* to check that everything is okay before going on to the next stage.
- » **Closure stage:** This stage involves a clear shut-down of the project work and then assessing the results, assigning project team members to new work, closing financial accounts. You should always carry out an evaluation of how things went and measure the benefits achieved. However, as some benefits might not come on-stream for a while, you may also need one or more further reviews after the project to measure them. Outputs from this stage should also include identifying lessons learned (good and bad things) from this project to help future projects.

For small projects, this entire life-cycle can take a few days. For larger projects, it can take years! Chapter 2 goes through these stages – the life of your project – in more detail so you can see exactly what you need to be doing and when.



REMEMBER

In a perfect world, projects run smoothly and always go exactly to plan. However, because you don't live in a perfect world and because your project certainly won't be running in one, you need to be flexible. When starting to think about your project, you need to allow for:

- » **The unknown and uncertain:** Projects are rarely 100 per cent predictable. The normal territory of projects is that, to some extent at least, you're going into the unknown. Therefore, your plans need to allow for things going off track. Sometimes the uncertain areas are predictable, which falls partly into

the area of risk management (see Chapter 10 for how to assess and manage risks). Sometimes the areas aren't at all predictable, and that comes into the area of contingency. You need contingency; remember Murphy's Law – 'If it can go wrong, it will go wrong.' You can find more about contingency in Chapter 10.

- » **Learning by doing:** Despite doing your best to develop good plans at the front end of the project, you may find later on that you can't achieve what you thought you could or in the way you thought you could. When this situation happens, you need to rethink in the light of the new information you've acquired. Sometimes you can see up front that you won't know how a particular part of the project is going to work out until you get nearer to that point and better information is to hand. Don't worry about that; just point it out clearly in the plans at the beginning.
- » **Unexpected change:** Your initial feasibility and benefits assessments are sound, and your plan is detailed and realistic. However, certain key project team members leave the organisation without warning during the project. Or a new technology emerges, and it's more appropriate to use than the one in your original plans. Perhaps the business environment changes and with it your organisation's whole market strategy. You need to rethink and re-plan in light of these new realities because ignoring them may seriously threaten the successful delivery of your project.

Defining the Project Manager's Role

The Project Manager's job is to manage the project on a day-to-day basis to bring it to a successful conclusion. They will usually be accountable to a senior manager who's the project Sponsor, or to a small group of managers who form a *Project Steering Group* (PSG) – sometimes known as a *Project Board*. The Project Manager's job is challenging (for instance, to coordinate technically specialised professionals who may have limited experience of working together).



REMEMBER

It's important to understand that the Project Manager's position is indeed a role; it's not about status. That's true of all roles in the project and there may, for example, be very senior people working as team members (such as a chief engineer and legal advisers) who are accountable to the Project Manager even though in the normal business they're much more senior. Have a look at Chapter 13 to find out about managing very senior people in your project.

The role of Project Manager doesn't include any of the technical work in the project. If that same person is involved in technical work then it's with a different hat on – that of a team member. The distinction is important because if you're doing teamwork as well as project managing, you must be clear about both roles and only wear one hat at a time. It's all too easy to neglect the management and let the project run out of control because you're so engrossed in the detail and challenges of your part of the technical work.

The Project Manager's role requires 'hard' skills such as planning and costing, but also 'soft' people skills. You can't specialise and cover only the hard skills, for example, with the excuse 'I'm not really a people person'. The next sections cover the main tasks that a Project Manager handles and notes potential challenges.

Looking at the Project Manager's tasks

Your role as the Project Manager is one of day-to-day responsibility for the project, and that might involve so much work that your job must necessarily be a full-time one. Or it may be that the project is smaller and less complicated and project management is just part of your job. Either way, the responsibilities are the same; it's just the scale and complexity that are different.

Here's a summary of the main tasks. Some things on the list involve consultation with others:

- » Sketch out initial ideas for the project, with the justification, outline costs and timescales.
- » Plan the project, including mapping out the controls that will be put in place, defining what quality the project needs and how it will be achieved, analysing risk and planning control actions.
- » Control the flow of work to teams (or perhaps just team members in a smaller project).
- » Motivate and support teams and team members.
- » Liaise with external suppliers.
- » Liaise with Project Managers of interfacing projects.
- » Liaise with programme management staff if the project is one of a group of projects being coordinated as a programme.
- » Ensure that the project deliverables are developed to the right level of quality.

- » Keep track of progress and adjust to correct any minor drifts off the plan.
- » Keep track of spending.
- » Go to others, such as the PSG, if things go more significantly off track (for example, the whole project is threatened).
- » Report progress to the PSG and perhaps to others too.
- » Keep track of risks and make sure that control actions are taken.
- » Deal with any problems, involving other people as necessary.
- » Decide on changes, getting approval from others where you don't have personal authority to make a decision (for example, when changes involve very high cost).
- » Plan successive delivery stages in more detail.
- » Close the project down in an orderly way when everything's done.

So, the tasks will keep you very busy but being a Project Manager can also be very enjoyable if you have things in control. And you get a real buzz when your project is delivered successfully.



Be proactive. Get out in front of the project and direct where it's going. Don't follow on behind the project being reactive and having to fire-fight countless problems because you didn't see them coming.

Opposing opposition

Be prepared for other people to oppose your attempts to use proven project management approaches. The following list provides a few examples of excuses you may come across:

- » **Excuse:** Our projects are all to short deadlines; we have no time to plan.
Response: Unfortunately for the excuse giver, this logic is illogical! With a short deadline, you can't afford to make many mistakes. If it doesn't matter too much when the project delivers, you don't need as good a plan as if it matters very much and time is short.
- » **Excuse:** Project management just means more overheads.
Response: So does corporate management, and that's essential too! But in any case, if you don't manage a project properly and it fails, how much will that cost in wasted time, money and lost benefits?

» **Excuse:** These projects require creativity and new development. You can't predict their outcomes with any certainty.

Response: You can predict some projects' outcomes better than others. However, people awaiting the outcomes of any project still have expectations for what they'll get and when. Therefore, a project with many uncertainties needs a manager to develop and share initial plans and then to assess and explain the effects of unexpected occurrences.

Avoiding 'shortcuts'

The short-term pressures of your job, particularly if you're fitting in project management alongside other work, may tempt you to cut corners. That's not the same as adjusting the project management needs to the project, but rather missing stuff out altogether that you know you really should have done. Resist the temptation to cut corners, because usually doing so comes back and bites you later.



WARNING

Don't be seduced into seemingly easier shortcuts such as:

- » **Jumping straight into building stuff (delivery):** Sounds good, but you haven't defined the work to be done! A variation on this shortcut is: 'This project's been done before, so why bother with planning?' Even though projects can be similar to past ones, some elements will be different. Always check the plan thoroughly.
- » **Failing to check progress at frequent intervals:** Just as when you're walking somewhere you need to check the map from time to time, so too you need to check the project. Otherwise you won't see warning signs and may be a long way off track by the time you notice that something's wrong.
- » **Not keeping the plan up to date:** That includes logging *actuals* such as the time actually taken to do things and the money actually spent. Yes, it takes discipline to keep things up to date, but you'll never be able to control the project if you don't know where you are at the moment.
- » **Not completing the closure stage:** At the end of one project, you can face pressure to move right on to the next. But you must check that the project has achieved what it was supposed to and that you and your organisation take on board any lessons, good and bad, for the future.

Deciding On Your Approach



REMEMBER

Always do what's best to bring your project to successful delivery. If you are using a particular approach, be prepared to modify it rather than follow it slavishly. If that means breaking some 'rules', then break them. That doesn't mean cutting corners or being negligent, but rather agreeing with the PSG that this is best for the project.



TIP

Focus on the project, its characteristics and its control needs. Then decide how to approach the project management based on the specifics of that project. Don't stretch your poor project around some inflexible standard approach carved in stone that doesn't really work for it, either in whole or in part. Instead, fit your approach around the project.

As an example of blindly following a project approach, I once went onto a customer site where the organisation was using a very well-known one. A conversation went something like this, although my comments were phrased a little more carefully, being an invited consultant:

Customer: We know it's stupid for this project but [approach named] made us do this.

Me: That approach is set down in a document. A document can't jump off the table, beat you around the head and make you do something. Why did you do something on your project which you knew to be stupid?

In short, when running projects always keep your brain in gear and be prepared to do the unusual if necessary to help successful delivery.

