FROM THE REVIEWERS

There is nothing harder than simplifying something. Mike Rounds has achieved the impossible with his latest book on project management. This book is a must-read for any business owner, entrepreneur or corporate executive. I'm throwing away my complex software programs and just following Mike Rounds' easy-to-follow format.

Robert Chesney
Executive Producer
Window on Wall Street

I have known Mike for over 20 years since my early stint in toy manufacturing industry in Taiwan and even to this date, I have never ceased to admire his concise and pragmatic approach to problem solving and time management. I highly recommend his book *Common Sense Project Management* to all project managers and professionals.

Frank P. Lam
Managing Director, Corporate Finance
CM-CCS Securities Limited, Hong Kong

Your ability to manage multi-task jobs or projects is a key to your success and largely determines your future. This powerful, practical, simple book shows you how.

Brian Tracy
International Speaker and Entrepreneur
Author of
The Psychology of Selling, The Psychology of Achievement

Of all the project management techniques I've observed in my career, this is the one that makes the most practical sense.

Tim O'Donnel
IBM

Mike has packed this book with simple 'how-to' techniques that even I can apply. On a scale of 1 to 10, this book gets an 11!

Russell Thomas
Meeting and Event Planner

Once again, Mike Rounds delivers the goods, this time in the area of project management. There is no one else who 'cuts to the chase' better than he does. Amazing!

Shelly Lisker
Director – University of California
Riverside

COMMON SENSE
PROJECT MANAGEMENT

How to Manage Projects, Priorities, and Deadlines

Mike Rounds

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Hall

Singapore London New York Toronto Sydney Tokyo Madrid
Mexico City Munich Paris Capetown Hong Kong Montreal

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ABOUT THE AUTHOR

Mike Rounds is a professional speaker, author and entrepreneur. He has organized and managed hundreds of projects from company picnics to 100 million dollar per year toy manufacturing assignments.

His success has been based on a simple system that he shares with thousands of people each year in international seminars and workshops.

Mike coaches project managers all over the world in the skills needed to simply and effectively organize and manage projects of all types, shapes, and sizes without the hassles of conventional project management systems.

ACKNOWLEDGEMENTS

Nobody ever gets anywhere completely on their own, especially when they are writing about their accomplishments.

So many people have helped my business success along that it is impossible to name them all, but here are a few whom I can honestly say are a prime part of the formulation of *Common Sense Project Management*. These include: employers Roy Baldarama, Don Goetter, John Gothard, John Kreuzer, Tony Clowes, Tom Litty, and Ken Voight; friends Don Baker, Don Balsamo, Don Pollock, Hector Escarcega, Tom Cornelious, and Jim Zinger; teachers Norm Halverson, Glen Conrad, Al Swartz, and Fred Davis; my mother Mary Jane Rounds; and most of all, my wife, my partner, and the person who puts purpose in my life, Nancy Miller.

INTRODUCTION

To the northwest and north of Beijing, a huge, serrated wall zigzags its way to the east and west along the undulating mountains. This is the Great Wall of China, which is said to be visible from the moon.

Construction of the Great Wall started in the 7th century B.C. The vassal states under the Zhou Dynasty in the northern parts of the country each built their own walls for defense purposes. After the state of Qin unified China in 221 B.C., it joined the walls to hold off the invaders from the Xiongnu tribes in the north and extended them to more than 10,000 *li* or 5,000 kilometers. This is the origin of the name of the "10,000-*li* Great Wall".

The Great Wall was renovated several times after the Qin Dynasty. A major renovation started with the founding of the Ming Dynasty in 1368, and took 200 years to complete. The wall we see today is the result of this effort. With a total length of over 6,000 kilometers, it extends to the Jiayu Pass in Gansu Province in the west and to the mouth of the Yalu River in Liaoning Province in the east. What lies north of Beijing is but a small section of it.

This tribute to man's ingenuity and resourcefulness was started over 2,500 years ago and still stands today as a tribute to what successful planning and resource management can accomplish.

The Great Wall did NOT happen by accident – it was a deliberate, planned and implemented construction task on

a magnitude that rivals modern day construction accomplishments.

What is amazing to many of today's planners is that there were no calculators, computers, software scheduling programs, courier services, or e-mail distribution systems – just pen, paper, an abacus, and the intuitive ingenuity of an organized mind. **Hence the beginning of project management as we know it today.**

Common Sense Project Management™ was developed on the simple, yet effective, premise that project management and the tasks accompanying it not only should, but also MUST, be a part of the solution and never a part of the problem.

Far too many books, tapes, manuals, training programs, and software systems have helped to perpetuate the myth that project management has to be complicated to be effective and yet, nothing could be farther from the truth.

In reality, the simpler the project management system, the more likely it is to be understood and implemented effectively whereas overly complex systems are confusing, create delays, cause cost overruns, and are a constant source of aggravation for the people involved in the project.

This is not intended to dismiss the systems that are so necessary to create projects like the International Space Station or to build the Three Gorges Dam on the Yangtze River. The complexity of these efforts requires that project management systems be implemented to not only create and manage the projects themselves but also to monitor and keep track of the consequences of the project like environmental impact studies, cost overruns due to delays, and seasonal climatic conditions – things that were never a concern 2,500 years ago.

However, the planning of a company picnic, an advertising campaign, the planning, writing, and publishing of a new book, or the manufacturing plan for a new toy or

television set does not need the same kinds of system it takes to put people into space. In fact, it is probably far too complex and cumbersome to be truly useful.

***Common Sense Project Management*™** promises to show you the historically proven, simple way to plan and implement just about anything you want to accomplish in a few short hours, using simple tools, and with a minimum of grief and aggravation.

The system has been used successfully since 1970 to manage production projects that ranged from the training systems for the ***Redeye® and Stinger®*** guided missile systems for the United States Marine Corps through hundreds of millions of dollars worth of toy and electronic production in Japan, Taiwan, Hong Kong, Korea, Singapore, Philippines, and Mainland China.

To help ensure that you understand the realities of the process, we have included details on a variety of things that you should know to effectively manage projects with a minimum of effort. Everything included is an integral part of understanding what is important to your ultimate success and what is not so that you can cut though all of the superfluous "stuff" and get to the heart of the matter – getting the project completed, on time and under budget.

However, if you feel that you know all of the time management techniques, tips for conducting effective meetings that actually accomplish something, and the effective ways of dealing with the difficult people you are bound to encounter along the way, then you can always skip right to ***Speed Scheduling*™** in Chapter 7 if you are so inclined.

Whatever you decide to do, know that this book, and the information contained in it, have been compiled to help you effectively plan and implement whatever projects you believe will make your world work better.

chapter 1

THE BACKGROUND OF PROJECT MANAGEMENT

Project management, or its early equivalent, has been with us since mankind could record a step-by-step process for accomplishing anything. This includes everything from a recipe for the proper cooking and draining of rice to the construction of temples, homes, roads, and bridges. Although it was not called project management until late in the 20th century, the principles have been around for thousands of years.

What is more important is that the five basic questions that accompany ANY project have NOT changed over the centuries. They are:

○ What will it look like or what is it supposed to do when it is done?
○ What is it going to take to get it done?
○ How long will it take to get it done?
○ How much will it cost to get it done?
○ Who is going to get it done?

(Hint : picture yourself in the presence of the Emperor of China as the decision is made to build the Great Wall. Wouldn't you be asking these same questions?)

Note that the projects of early civilization were every bit as difficult as the projects of today's world. In fact, by

comparison of available technologies and communication techniques, they were decidedly more complex.

So how did the early project managers plan, monitor, and control enormous projects like the Great Wall, the great pyramids in Egypt, the great temples in Greece, and the great Colosseum in Rome?

The answer is that all of these projects, and millions of others, both large and small, owe their success to one common factor – effective project management – because without it, none of them would have been successful and stand as the monuments that they have become.

For thousands of years, project management was not a specifically defined mandate – it evolved out of the need to logically organize and manage the manpower, materials, and money required to accomplish something. Its formalization has become a form of bureaucratic control and the need to quantify the tasks surrounding the effective management of a project.

Consider that everything we do, from the process for getting dressed in the morning to planning a multi-million dollar project, requires project management at some level or another. The principles involved are still the same and basically very simple, but are not necessarily easy because their effective application requires discipline and consistency – two traits which human beings tend to resist.

Taking a calculating look at what simple, yet effective, principles have worked for thousands of years and bringing them forward into the 21st century, is what developed into *Common Sense Project Management™*.

Their principles have a proven track record of success, both historically and in the business career of the author, where they have been used to manage everything from the writing of this book to hundreds of millions of dollars worth of annual production projects.

What Is Project Management?

Project management is often confused with classic management but it differs substantially because it focuses on a project rather than the ongoing supervision and monitoring of people's actions.

Management is defined as the conducting or supervising of something (such as a business) on an ongoing basis whereas **project management** is defined as an undertaking that has a beginning and an end and is carried out to meet established goals within cost, schedule, and quality objectives.

Project management brings together and optimizes the resources necessary to successfully complete a precisely defined project. These resources include the skills, talents, and cooperative effort of a team of people; facilities, tools, and equipment; information, systems, techniques; and money.

Project management also differs from other classic management principles in three significant ways.

○ First, project management focuses on a project with a finite life span, whereas departments or other organizational units expect their projects or functions to exist indefinitely.

○ Second, projects frequently need resources on a part-time basis, whereas permanent organizations try to utilize resources full-time.

○ Third, project management is generally subordinate to the general management of an organization.

So once again, what is project management? Really?

Project management is the ability to
derive organization and order from chaos!

How Did Project Management Develop?

Project management evolved with civilization and developed as the need to control available resources became apparent to those in positions of power and responsibility.

Key people were being held accountable for the successful completion of their assignments and soon learned that they needed a technique for monitoring and controlling the materials, money, and events relating to the success of their defined duties.

Although the basic principles of project management have been in use for thousands of years, the discipline was formalized for use in managing the US space program and the development of the Triton submarine in the early 1960s. Since then its practice has expanded rapidly throughout the world to government agencies, the military, industries, and social-service organizations.

Today you will find the principles of project management (along with a ton of software programs) being used under the names of program management, product management, resource management, project management, construction management, and configuration control.
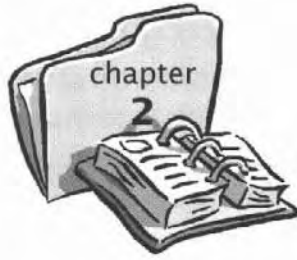
HOW TO TELL IF YOU WILL MAKE A GOOD PROJECT MANAGER

"Anyone can be a good project manager – if they pick the right project to manage." Mike Rounds

Years ago, when I was in the aerospace industry, I attended my share of generic management classes. Each of them was unique and valuable and yet, each of them taught a basically flawed concept that stated: "Management is management. If you are a skilled and properly trained manager, you can manage anything."

The reason that I believe the concept is flawed is that it assumes that ALL general management and project management problems are the same, and can be handled with generic solutions when in reality, nothing could be farther from the truth.

Technical problems on technical projects require knowledge of the technology and the range of disciplines required to address the problems effectively. Although the basic attitudes and negotiating skill set for handling technological problems might be similar to handling marketing problems, the specific knowledge of each discipline is different and must be considered when assigning someone the challenge of managing the situation.

If you do not take the specifics of the situation into consideration, you are trying to put a square peg into a round hole and although you can "shave" the corners and force a match, it is still not a smooth fit.

Experience shows us that people who understand their SWOT factor and use it to their best advantage conduct the best and most effectively managed projects.

SWOT is an acronym that stands for **Strengths, Weaknesses, Opportunities, and Threats.** Conducting a SWOT analysis is an effective way of analyzing the potential of an individual, manager, group, or an entire organization's potential for success (or failure) by identifying the Strengths and Weaknesses, and to examine both the Opportunities and Threats, which may affect the people involved.

Concentrating On Your Strengths

As a project manager (and as an active part of the project team) it is important to know what your strengths (talents) and weaknesses (liabilities) are. If you have never done one, a SWOT analysis is a great way to find out what you (and your team members) are good at and what you are not.

SWOT analyses provide a formal approach to evaluating your strengths and weaknesses, along with the opportunities and threats that you face. The logic behind the SWOT concept simply states that if you find a project that suits your strengths, and where your weaknesses do not matter, you will accomplish a lot more with less effort.

There are two primary variations on a SWOT analysis:

1. General skills and
2. Topic or project specific.

Although you may be interested in knowing your SWOT profile from a general perspective for purposes of getting on with your life, from the standpoint of project management, it is more appropriate to conduct a SWOT analysis as it relates to the project at hand. In fact, it is an

excellent way of analyzing the relative advantages offered by each team member for each individual project.

Since graphical representation seems to make it easier to understand the relationship of the four elements, the best method of displaying the results of the SWOT analysis is to use a whiteboard or plain piece of paper and split it into four sections as follows:

Strengths			Weaknesses	
Description	Action		Description	Action

Opportunities			Threats	
Description	Action		Description	Action

To do a SWOT analysis, read the descriptions of the topics and write down answers to the related questions. Once you have answered the questions and refined the wording, put the refinements in the boxes so they are easy to see and address.

Strengths – These are controllable advantages

They include the knowledge, skills, abilities, motivation, experience, etc., that you and your associates possess; the resources, products, services, client base, reputation, brand, etc., existing within your work unit or organization that apply to the project.

Questions:

- ○ What are the advantages to the project of using your talents and skills over those of others?
- ○ What specific experience do you have that make you the ideal person to manage this project?
- ○ What do you do well that relates to the project?
- ○ What relevant resources do you have that relate to the project at hand?
- ○ What do other people see as your strengths as they apply to the project at hand?

Consider this from both your own point of view and from the point of view of the people you deal with. Do not be modest. Be realistic. If you are having any difficulty with this, try writing down a list of your own dominant characteristics. Some of these will hopefully be strengths that will help you to manage projects more effectively!

In looking at your strengths, think about this example: Suppose you are a sub-contract toy manufacturer in Hong Kong and you are bidding on a manufacturing contract from a US toy company. If all of the firms bidding on the project have experience in both injection molding and plush products, having knowledge and experience in these areas is not merely strength, it is a necessity.

Weaknesses – These are controllable disadvantages

These are the deficiencies (lack of strengths, counterproductive habits, etc.) that you must compensate for, overcome, improve, or avoid in order to be successful.

- ○ What could you improve that would be an asset to the project?
- ○ What do you do badly that could negatively affect the project?
- ○ What should you avoid in the way of project tasks because you are poor at them?
- ○ What causes problems or complaints in the project or your management style?

Again, consider this from an internal and external basis. For example, if your firm wants to do more business with German toy makers, and you do not have staff that speaks German, are you putting yourself at a serious disadvantage by working with a nationality where you do not speak the language? Even though you may not consider this to be a serious impediment, do your potential clients seem to perceive this as a weakness that you do not see? Are your competitors doing any better than you? It is best to be realistic now, and face any unpleasant truths as soon as possible.

Opportunities – These are uncontrolled, favorable circumstances

These include changing needs and marketplace trends, increased customer demands, technology advances, competitor weaknesses or failures, etc., to take advantage of to make the project successful.

- ○ Where are the good opportunities that fit well with your talents and assets as they apply to the project?
- ○ What are the trends you are aware of that really interest you that relate to the project?

A useful approach to looking at opportunities is to look at your strengths and ask yourself whether these open up any opportunities. Alternatively, look at your weaknesses and ask yourself whether you could open up opportunities by eliminating them.

Let's say, for example, that several years ago you were involved in the design of digital displays. The customer bid opportunity includes toys and games that have digital displays as a part of the design. Your unique background in this specific area of design may give you an insight into the tasks and specific concerns involved that others do not have.

Threats – These are uncontrolled obstacles

Included in this category are changing job requirements, increased workload, competing priorities, shrinking markets, tight or tenuous economies, competitor advances, shrinking resources, restrictive laws and regulations, etc., that will hamper or prevent the success of your project.
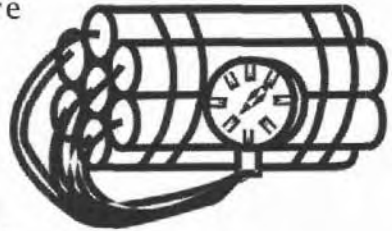
- O What obstacles do you face in successfully accomplishing this project?
- O Are the objectives and/or specifications for the project unclear or changing?
- O Is changing technology threatening your project?
- O Are budgeting or cash flow problems threatening your project?
- O Could any of your weaknesses seriously threaten the project?

For example, if the project requires specific knowledge of the safety regulations for toy manufacturing for both the United States and Europe, and you have no knowledge of these standards, you may be putting yourself, and your organization, in a compromising situation because you are not competent enough to judge whether or not the designs created by your project team will be compliant and saleable in the target markets.

Once the SWOT analysis has been completed, mark each point with the following action:

- ○ (A) Things that MUST be addressed immediately.
- ○ (H) Things that can be handled now.
- ○ (R) Things that should be researched further.
- ○ (P) Things that should be planned for the future.

Now that each point has been prioritized, set an action point for each and assign it to a person, add a deadline, and begin to work on them. The SWOT analysis results should be reviewed on a regular basis to determine if anything has changed and what has been achieved.

The example below is typical and can be used as a guideline for doing your own Project SWOT.

Background: Your organization is in the business of sub-contract manufacturing for the US and European marketplace.

Your existing capabilities include experience, tooling, and technical support for:

- ○ The design and fabrication of plastic injection molded products.
- ○ The design and fabrication of printed circuit boards.
- ○ The fabrication and testing of electronic calculators, digital clocks and watches, and hard-wired consumer telephones.
- ○ Direct experience and contact with sub-contract manufacturers in Mainland China.

The project is to develop a production capability for wireless consumer telephones for use in home and business environments.

Strengths:

1. Extensive experience in related electronic design and fabrication.
2. Existing tooling and test equipment for most of the new products.

3. Knowledge of both US and European standards for telephones.
4. Current assembly lines can be easily modified to accommodate the new products.
5. Access to low labor costs in Mainland China.

Weaknesses:
1. No direct experience with wireless telephones.
2. No test equipment for wireless telephones.
3. Lacking in personnel with directly related experience in the manufacturing and testing of wireless telephones.
4. Current facilities limit the total amount of fabrication growth that can be accomplished on-site.

Opportunities:
1. If you proceed with the project, your firm will acquire the tools and technology for manufacturing and testing wireless telephones, thereby opening this product line for additional bid opportunities.
2. The magnitude of the project will allow for expansion capabilities that will be needed for future competition in this area of product technology.
3. Successful completion of this project, and the sale of the line's capability, will create a greater profit base for your organization and allow for further expansion and the opportunity for promotion.
4. If the project is successful, you will have the opportunity to sub-contract portions of the project on a competitive basis and further enhance your ability to bid and build competitively in the future.

Threats:
1. Competitive bidders already have experienced personnel and facilities for this product line.

2. Investing in this expansion does not guarantee new business – simply the opportunity to competitively bid on it.
3. Lack of specific knowledge regarding costs, timing, and the risks specifically related to this project pose a threat to the timely success of the project.
4. Both the technology and the marketing are in a constant state of change and products might be obsolete before the production runs are completed.

Conclusion:

Based on these questions and based on the questions and answers as defined:

1. Do you believe that the project, as outlined, has a greater chance of overall financial success than failure? ☐ **Yes** ☐ **No**
   Why? _____

   _____

   _____

   _____

2. Do you believe that you are the right or wrong person to be involved with the project at the levels and skills required and defined to make it successful?
   ☐ **Yes** ☐ **No**
   Why? _____

   _____

   _____

   _____

Strengths			Weaknesses		
Description	**Action**		**Description**	**Action**	
Extensive experience in related electronic design and fabrication			No direct experience with wireless telephones		
Existing tooling and test equipment for most of the new products			No test equipment for wireless telephones		
Knowledge of both US and European standards for telephones			Lacking in personnel with directly related experience in the manufacturing and testing of wireless telephones		
Current assembly lines can be easily modified to accommodate the new products			Current facilities limit the total amount of fabrication growth that can be accomplished on-site		
Access to low labor costs in Mainland China					

Opportunities			Threats		
Description	**Action**		**Description**	**Action**	
If you proceed with the project, your firm will acquire the tools and technology for manufacturing and testing wireless telephones, thereby opening this product line for additional bid opportunities			Competitive bidders already have experienced personnel and facilities for this product line		
The magnitude of the project will allow for expansion capabilities that will be needed for future competition in this area of product technology			Investing in this expansion does not guarantee new business – simply the opportunity to competitively bid on it		
Successful completion of this project, and the sale of the line's capability, will create a greater profit base for your organization and allow for further expansion and the opportunity for promotion			Lack of specific knowledge regarding costs, timing, and the risks specifically related to this project pose a threat to the timely success of the project		
If the project is successful, you will have the opportunity to sub-contract portions of the project on a competitive basis and further enhance your ability to bid and build competitively in the future.			Both the technology and the marketing are in a constant state of change and products might be obsolete before the production runs are completed		

Now it is your turn

1. What is your project? (Be specific with the objectives)

    _____

    _____

    _____

    _____

2. What are your strengths? (Be specific with respect to the stated objectives)

    _____

    _____

    _____

    _____

3. What are your weaknesses? (Be specific with respect to the stated objectives)

    _____

    _____

    _____

    _____

4. What are the opportunities afforded? (Be specific with respect to the stated objectives)

    _____

    _____

    _____

    _____

5. What are the threats involved? (Be specific with respect to the stated objectives)

    _____

    _____

    _____

    _____

SWOT Analysis Chart

Strengths	Action	Weaknesses	Action

Opportunities	Action	Threats	Action

Conclusions:

1. Should we proceed with the project? ☐ **Yes** ☐ **No**
2. Am I the right person for the project assignment as defined? ☐ **Yes** ☐ **No**

Rate Yourself As A Project Manager

Anybody can be a project manager because on a daily basis we all plan and manage projects at one level or another. Everything we do requires a sequence of events, resources, people skills, time, and money. This is what we call project management!

Rate yourself on each of the following skills required to be a successful project manager. Place a check mark ✓ in front of each skill you feel you can handle. When you are finished, the ones not checked represent opportunities for development.

Project Management Skills List

My project management skills include:
☐ Organizing a project from beginning to end.
☐ Structuring a plan that will stand up under pressure.
☐ Getting people to accept my plans and support them.
☐ Setting measurable project objectives.
☐ Motivating team members.
☐ Helping team members solve problems.
☐ Utilizing available resources.
☐ Eliminating waste of time and money.
☐ Measuring project performance.
☐ Using information systems that respond to project needs.
Score Yourself: My Score _____
9 – 10: You are already a project manager.
4 – 7: You are starting at the beginning. Good luck!
1 – 3: You might want to consider a career in chicken plucking.

THE BENEFITS OF PLANNING

"Once you know why, you'll figure out how." – Ancient proverb

Effective project management and the planning involved are not used to create unneeded jobs or tasks. They are an essential part of virtually every successful project and planning can benefit you in so many ways it is hard to mention them all. However, here are some that stand out above the rest.

Why Do We Plan?

1. Proper planning gives direction

Planning stimulates you to think about the promise of the future rather than the failures of the past. It also tells the people who are responsible for the success of the project, what they are expected to do to get the project done on time, in budget, and to what standards of acceptability.

When all the people involved in a project have a clear idea of what needs to be done, when it needs to be completed, and what resources they will have available to accomplish their tasks, the scope of the undertaking is made clear and everyone involved can start moving towards the

successful completion of the defined task rather than wasting time and resources on things that are not focused towards the stated objective.

For example, if you need to locate a sub-contract source for parts and pieces that are normally best sourced in Mainland China, it will be far more productive if you assign the task of locating a source to someone who is familiar with Mainland China resources than to let the first available individual flounder with the task. By directing the most knowledgeable individual to complete this particular task, you will enjoy a greater level of success than if you let everybody involved make guesses.

2. Proper planning provides coordination

Planning ties your efforts and aspirations together in a simple, easily understood, well-balanced program instead of having a lot of people doing "their own thing" or things that do not contribute to the success of the program.

Effective project management provides the following four things above all else:

Clarification
Coordination
Contingencies
Commitments
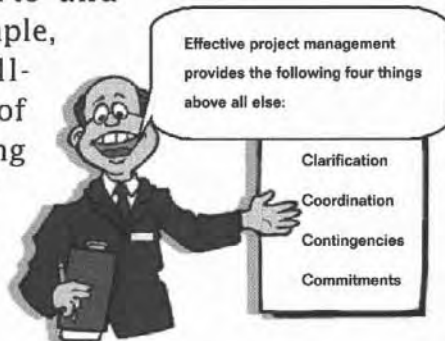
Once common goals and objectives have been defined, properly planned and executed, project planning encourages creativity that helps to coordinate the available resources towards the successful completion of the defined task.

This single aspect helps to promote an atmosphere of cooperation and provides the foundation for a team effort rather than having everybody competing with each other. These teams will benefit from having the four C's of project management fully defined before they embark on the project:

Clarification of the goals, objectives, limitations, and authority

*Coordination of the efforts of all the parties involved
Contingencies that might occur and what recourse are
available if the events actually occur
Commitments that have been made and must be met for the
project to be successful*

3. Project planning provides standards

Effective planning helps you to define acceptable limits for people, performance, and outcomes.

Once precise definitions of performance and expectations have been put in place, we have the ability to measure our progress and figure out how well we are doing in relation to the overall plans and objectives for the project.

One of the most important things that it eliminates is the guesswork that inevitably creeps into a project and removes the "I thought this would be acceptable" excuse from the program.

4. Planning clarifies

Planning helps us figure out what we really want out of a project.

By carefully defining and refining our objectives, we provide ourselves with an effective tool for getting past the unnecessary tasks that inevitably creep into our daily lives that do not contribute to the success of the stated project.

Once we know what is essential to our success and what is not, we can more easily avoid wasting resources on those things that do not help us to accomplish our stated mission.

5. Planning prepares

Although surprise birthday parties may be popular with human beings, surprises connected with late deliveries, excessive costs, and undocumented specifications are not.

Planning gives us the tools we need to deal with sudden and unexpected problems that can hit us at any time and

from any position by letting us know not only what our tasks are, but what other members of the project team are faced with and what elements can be modified to accommodate our needs if necessary.

6. Planning reveals

Planning gives us a clear picture of how different tasks and activities interact to ensure success in our overall quest.

As we think about the tasks that have been defined, we begin to uncover those hidden or unforeseen things that inevitably crop up in just about anything we do in life. During the course of both the planning of a project, and the implementation of the project plan, we have the benefit of a set of established goals and standards that provide us with the ability to look at the project and ask ourselves: "what's wrong with this picture?"

If something is not in concert with the plan as we have defined it, we will know immediately that something is wrong and needs to be addressed before the problem becomes insurmountable.

Planning stimulates

By knowing in advance of a task or event what needs to be done or what we should expect, we create an atmosphere of anticipation.

Planning leads us onward and upward by providing the stimulation we need to avoid dead-ends and blind alleys in our work, creativity, and relationships with other members of the project team.

Planning improves morale, attitudes, and relationships with other people while giving a sense of security about the days ahead.

THE DANGERS IN PLANNING

No process is foolproof. Planning a project, even to the smallest detail, cannot guarantee success. Fortunately, none of the following dangers is so serious that you cannot handle it whenever it occurs. However, knowing what the dangers are allows us to plan so we can avoid them.

What Are These Dangers?

1. Loss of spontaneity

"If it isn't in the plan, we aren't doing it."
A plan is a guideline, not an unshakable process.

Life deals us unexpected obstacles, so we need to be flexible in order to handle them. Sometimes project plans lead the people involved to believe that there is only one way to do it – the way the plan says.

You'll be more successful if you allow team members the ability to make changes as long as three primary guidelines are followed:

  ○ Be as creative as necessary to resolve the discrepancy as long as it does not severely impact other elements of the project.

- ○ Get approval from the responsible authority if severe changes will occur as a result.
- ○ When a problem occurs, ask for help immediately to resolve the discrepancy.

2. *Too much faith in the process*

"The plan says the materials will be here on the 15th of the month so we know they'll be here on time." Just because the plan says something is supposed to happen does not mean that it will.

Projects rarely unfold exactly as planned because the plans are drawn up prior to the project itself and are merely paper and ink. Their successful completion depends on the human element and the cooperation of all the team members.

Even with the best plans you have to monitor the progress and be prepared to accommodate Murphy's Law which says: "anything that can go wrong, will go wrong, and at the worst possible time."

A policy of flexibility and an attitude of ingenuity will go a long way towards overcoming the inevitable setbacks that occur.

3. *Lack of growth*

Good planning and execution will often stifle achieving a more productive and profitable outcome than was originally planned.

Why? Because for those who are concerned about "covering their assets", a plan makes a perfect shield to hide behind so they do not have to make decisions that are not called for, even if making the proper decision could improve the results. Then, if something does not go as well as everyone had hoped for, they can always blame the plan as being flawed.

The operative theory of project management and planning is that the whole process is organized and waste is minimized.

We have all experienced projects and budgets that must be adhered to or we will look too good! For as silly as it seems, projects are often intentionally delayed or overspent to make sure that they come out exactly as planned and do not look any better than planned.

Fixing the blame will not fix the problem and when this attitude of "we must stick to the plan even if it is wrong" prevails, everybody loses.

Do not be afraid to challenge the system and the plan itself if you discover that there are inequities that are going to inevitably cause it to fail. Most projects incur some level of "running changes" during their existence and yours probably will not be any different.

For example, many US firms select a particular country to manufacture their product because of the "most favored nation status" that provides them with a reduced tariff rate. If the "favored nation status" is revoked and the client has to have the reduced tariff rate, you might be required to change the country of manufacture to meet the design-to-cost parameters.

4. Psychological distress

Even though most of us live our lives governed by one schedule or another, some people go crazy when they are confronted with the prospect of a plan that is committed to paper or where their performance is going to be available for others to look at and review.

This is a greater problem than most people are willing to admit because one of the most difficult things for human beings to do is to simply say no.

The problem appears in the course of setting up a project when people volunteer for, or are assigned, tasks for which

they are not suited. As the project progresses you will notice that they do not perform at all, or perform very poorly, and have a lot of excuses for their lack of performance.

You will also notice that when you get concerned and offer to assist them that they get defensive and hostile. This is your primary indication that they are "in over their heads" and need to be replaced or relieved of some level of responsibility for the project.

For many people, a formal project-planning document is the first time in their lives where they have ever had anything laid out so precisely and the pressure becomes overwhelming to them.

They become irritable, unfriendly, and uncommunicative about anything except the project. Their entire existence seems to center on meeting the deadlines, commitments, and budgets of the plan that they develop a paranoid attitude, and become ineffectual.

For as wonderful a planning tool project management skills have become, they are a potential danger to people who simply cannot operate within tightly defined guidelines. Look for signs of this inability to adhere to the plan and replace the individual as soon as possible or you will end up with a disaster on your hands.

5. Hang-up on methods

For all of the dumb things that project management might possibly do to people, putting "braces on their brains" is one of the worst.

Project management often specifies the methods that were decided upon at the onset of the project. As the project progresses, more efficient methods may be discovered but because "they are not in the plan", they do not get implemented.

One of the other excuses that simply gets in the way is "this is the way we have always done it." Remember that our

world is evolving and changing technologically at the rate of every one to five years. This means that no matter what you are involved with, that significant changes and new methods of doing things will inevitably be available to you, probably during the active life of your project.

Do not reject new ideas simply because you did not plan on using them when the project started. These changes in goods and services were developed and made available to help you succeed, not to cause you grief and aggravation, so be open to the changes that will occur and be prepared to evaluate their appropriateness to your program. Just remember: The benefits in planning still far outweigh the dangers.

chapter
5

DEFINING THE CONCEPT

The Payoffs In Project Management

In the world of products, market analysts have determined that people usually do not buy products – they buy product benefits. For example, last year in the United States, 187 million people bought a product they did not want – a drill. What they really wanted was the benefit of the product, which is a hole.

Now here's the enigma: until someone comes up with Velcro® stick on holes, we are stuck – buying a product we do not want (a drill) to get a benefit that we do want (a hole).

Project management is pretty much the same thing unless you really get excited about planning and charting stuff. It is not the project management that we are really interested in – it is the end result, whatever that may be: coming out on time, meeting the required specifications, and not costing more than we planned. That is what project management is really all about.

So if we're not interested in project management, then what are we interested in?

The answer comes from an old acronym WIIFM – What's in it for me?

An analysis of the possible "payoffs" shows that there are actually six (6) benefits or payoffs for successful project management and depending on the project and the objectives, you could be rewarded with one, two, or all six of them.

1. Profitability

We might as well start with the big one. Most people respond real fast when you talk into their good ear – the one connected to their wallet.

Profit means we believe that by successfully planning and managing a project that we will profit in some manner. This actually encompasses three different areas that potentially overlap:

O **Make money** – Our payoff comes in the form of cold hard cash. Some of the more practical examples include such things as bonuses paid for completing a project on or ahead of time, and under budget.

O **Save money** – Planning helps us identify cost overruns, excess labor, and costs associated with scheduling delays. These all translate to immediate cost saving for the project and the organization.

O **Save time** – Time management is a myth; time does its own thing. All we can do is control what we do with the time we are given. Project management and scheduling lets us make the most efficient use of our time by showing us exactly what we are doing with the time and what we can do to use it more efficiently.

2. Prevention of loss

As human beings we hate losing what we have worked hard to achieve. We usually do not mind giving it away as long as it is our choice but we do not like having it taken from us without our permission.

Effective project management helps insure against the loss of time and money but more importantly, the loss of our clients who might choose to take their business elsewhere if we do not perform as promised.

3. Pleasure

For as silly as it might seem, there is a great deal of pleasure, comfort, and security in knowing that a project is under control. Most people enjoy being happy and content with their efforts and a "job well done" adds to this feeling of self-satisfaction and knowing that they are doing something well.

4. Avoidance of pain

The pain associated with loss or failure of a project. Projects that are out of control are emotionally and financially stressful.

Frustration in the workplace because the things that we are responsible for seem to get out of our control is a major consideration in ulcers, nervous disorders, and the tension episodes that seem to plague many managers in today's world. Successful project management will help prevent most of the unexpected disasters that cause us aggravation and help to keep both our projects and our emotions under control.

5. Pride

Pride in the project (and our job too). The old concept of "if it is worth doing, it is worth doing well" has not changed.

Bringing in a job on time and under budget is something to be proud of and there is nothing wrong in taking pride in your successful accomplishments and
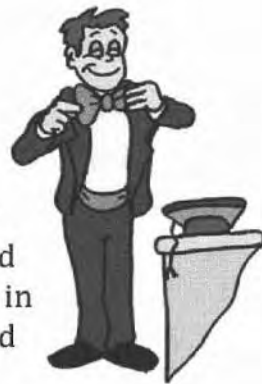
besides, who is the boss going to promote – you, the successful project manager or the person who misses deadlines, overruns the budgets, and does not care?

6. Desire for approval

We want our client's approval so that we can solicit future business but we also want the approval of our co-workers and our boss too. (Do not forget – it is the boss who approves the raises and promotions...)

So there you have the reasons why you will want to successfully manage a project. It is a good idea to examine your motives and the benefits to you personally as well as the benefits to the organization and the benefits to the client too. It will help motivate you to do a good job.

The Objectives Of Project Management

"If you don't care where you're going, any road will do."
– Ancient proverb

Project management has defined goals and objectives connected with it. These are, of course, different for each project and established by the project manager, the client, or the entire project team.

The reality of effective project management is that the more clearly you can define your goals and objectives, the more control and understanding you will have throughout the course of the project.

What do we want to accomplish?

What will it look like when it is done? What is the project supposed to do, or be when we are through?

Remember that project management is supposed to focus on a specific set of goals and the more tightly defined we can make those goals, the easier it will be to tell if we are

getting close to accomplishing them or if we should take corrective actions.

What will it look like? Try to describe it in as much detail as you would if you had successfully accomplished the project and were telling your co-workers about it at dinner.

Think about a jigsaw puzzle with over 1,000 pieces. If you have the box cover with a picture of the completed puzzle, you can eventually complete the puzzle, even though it might be extremely difficult.
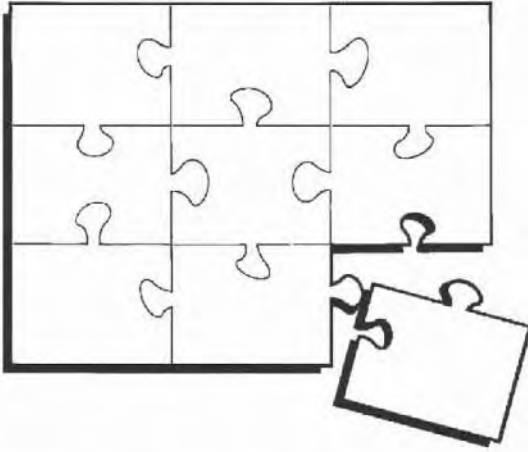
Now imagine trying to complete the puzzle when you have no idea of what it is supposed to look like when it is finished. It is next to impossible to complete and even when it is, how will you know that it has been assembled correctly?

What are the project's functions? What is it supposed to do or accomplish? The more clearly you can describe it, the easier it is to test it and see if it works or does not.

What are its features?

What considerations are there? Will you have to reschedule another project to accomplish this one? Will you have to hire more help? Buy more tools? Actually work on it yourself?

Maybe you will have to work with a difficult employee, co-worker, or vendor who has been an impediment in the past.

Think about it – the project's success or failure might well depend on what considerations or concessions you or

your organization has to consider. Define the final outcome in as much detail as possible before you embark on the project so that you will know whether you are achieving the true goals of the project or not.

Time? [When?] How soon do we need it completed?

When does it need to be completed? Timing (is everything) – when does the project have to be completed? In other words, be realistic about your assessment of all the deadlines involved.

> I wish for my project to be under budget and ahead of schedule

We would all like to rub a magic lamp and have a project done in zero time but practically until we find that magic lamp, we are going to have to plan on every component of a project taking time and taking time away from something else.
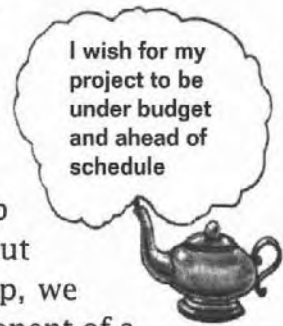
The ultimate success of a project includes not only the project's deadline but also the lives of the people who are involved in it. Look carefully when you suspect that the project is going to require that the participants give up family time, work unpaid overtime, and have to give up everything else to make the deadline.

"Losing face" by missing a promised deadline is considered unthinkable in the Eastern cultures but it is a lot better than losing friends, employees and money by trying to accomplish deadlines that are not really necessary.

Flogging people until the morale improved might have worked on galley slaves but it is a questionable business tactic when people have alternative employment options.

Budget? [How; Where; Who?] How do we accomplish it? Where do we do it? Who is going to do it?

Remember that speed costs. How fast do you want to go? How fast is the client willing to go considering that the increased speed costs more?

Getting something done quickly might be intellectually stimulating and a big reward for our ego but something has to "give" to make the tight deadlines. We would like the best of everything but can we afford it and do we really need it?

Much of what we create in today's world is a part of a planned obsolescence program of one sort or another. Are you planning for something that will last as long as the Great Wall?

The emperors of China could go conquer another nation to pay for their projects. They had the army at their disposal and could levy taxes to pay for the overruns. Most of us do not have that luxury in the foreseeable future so we have to carefully create and stay within budgets that make sense to the project and the overall financial health of the organization.

Consider that people will be involved too. Hiring the best people might be a requirement but the best usually costs more. Do not skimp on paying for talent when you need it but be careful to assess what you really need. Paying for champagne when you have a beer budget is a sure road to project bankruptcy and disaster.

Where is the project going to be accomplished? Does this particular project require some special facilities? Do you know what they are, where they are, and how much they will cost?

Location, location, location – no, this is not a real estate ad but consider that some projects, like fund raising events, meetings, and annual meetings center around a unique physical location that may or may not always be available.

Some projects require that we allocate or acquire additional facilities to accomplish the task. Others like a manufactured project require the use of facilities and tooling to accomplish the defined objectives. Do not overlook physical locale and the associated costs when planning a project.

For example, consider a manufacturing program in Hong Kong where the client wants you to space out the shipments over a 24-month period.

Logistically, it is more financially expeditious for your plant to build the product in about three months but you are now faced with the storage of a warehouse full of product for two years. There is a logistics and cost element involved here that is possibly as big as the manufacturing process itself because warehouse space is at a premium in Hong Kong. If the manufacturing program is being competitively bid and the margins are small, the cost tradeoffs in taking on this project will have to be carefully examined to make sure that it is financially expeditious given the logistics of the situation.

If the client is unwilling or unable to cover the costs of the warehousing and logistics, you may have to consider "no-bidding" the project due to the losses you will likely incur with the storage charges.

Never forget project management is a form of entrepreneurship because like owning your own business, you have the profit and loss responsibility resting squarely on your shoulders.

WHY PROJECTS FAIL AND HOW TO PREVENT IT FROM HAPPENING

"People don't plan to fail – they fail to plan." – Old proverb

Most projects fail when they do not meet the following criteria for success:

○ They are not delivered on time.
○ They are over budget.
○ They do not do what they were supposed to do.

Only a few projects achieve all three. Many more are delivered which fail on one or more of these criteria, and a substantial number are cancelled, having failed badly.

So what are the key factors for success? Organizations and individuals have studied a number of projects that have both succeeded and failed and some common factors emerge. The sad fact is that most projects fail because we do not recognize that good business principles should be applied to projects the same way they are to running the business on a daily basis.

Most project managers try to defend themselves by saying that project management is "different" when in reality nothing could be further from the truth. Projects are the building blocks that make up the overall structure of the

business and when a project fails, part of the overall business structure fails too.

The Three Keys to Project Success

There do seem to be three factors that all successful projects have in common. Each of these factors is key to any project's success. Each project can be viewed as a three-legged stool. All three legs must be in place for the stool to stand sturdily. In a systems project, these "legs" or critical success factors consist of the following:

O Top management support for the success of the project.

O A sound methodology for accomplishing the stated goals of the project.

O Solid leadership by someone who has successfully completed a similar project.

Without each of these solidly in place, the stool will topple and the project will fail.

Causes Of Project Failure

Statically, no one overriding factor causes project failure. A number of factors are usually involved in any particular project failure, some of which interact with each other. Here are some of the most important reasons for failure.

1. Lack of leadership

It is difficult to believe that an organization can commit thousands and even hundreds of thousands of dollars to a project and then fail to lead that project to success. Yet, when we look at the reasons projects fail or succeed, leadership is the one common denominator.

For a project to succeed, all parties impacted need to be a part of the project team or represented by someone on the team. This includes the end users because if they do not share the vision and are not in a partnering role, they will invariably find a way to sabotage the project. The leader must align the team and insure that all members are on the same page and committed to the project's success.

By far the greatest source of team failures is poor team dynamics and poor facilitative leadership behaviors. Approximately 60 percent of teams that fail have these as their major reasons. The most common problem areas are the lack of:

- ○ Meeting skills.
- ○ The knowledge and ability to set agendas.
- ○ Knowing how to determine the meeting's roles and responsibilities.
- ○ The ability to set and keep ground rules.
- ○ Facilitative behaviors.

2. Lack of clarity

Projects fail to deliver the results when the results have never been specified. Projects do not fail at the end; they fail at the beginning because we take for granted that we all understand the problem perfectly, when this is not the case at all.

Many projects have high level, vague, and generally unhelpful requirements. This has led to cases where the project team, having no definitive input from the client, build what they believe is needed, without having any real knowledge of the business.

Inevitably when the project is delivered, business users say it does not do what they need it to. This is closely linked to lack of user involvement, but goes beyond it. Users must know what it is they want, and be able to specify it precisely.

In order for projects to be effective, it is vital that an expected result be clear.

3. Little or no due diligence is performed

Sometimes we need to have a project implemented yesterday, yet we do not have the time or resources to first do our homework. While it is certainly possible to "fast track" a project, many projects fail because somebody did not do the research necessary to make proper decisions.

In every project there is the risk of failure. The best way to reduce risk is to do the research and discover as much as possible about the project up front. Many times we do not have the time or expertise and need to consult with an expert, or a consultant whom we trust. When this happens, an outside, third-party observer who can add value by providing information that we do not even know that we do not know about a particular project will help to ensure success.

The other advantage of using an expert may be that they can focus on the project. Most projects are not a person's full-time job. It is easy to get caught up in what is known as the "tyranny of the present", the everyday emergencies that seem to prevent getting done what needs to be accomplished for the project to be successful. It is what Stephen Covey refers to the urgent, but not the important.

4. Lack of accountability

Most vendors, consultants, or project managers will promise to produce results that fulfill a functional specification – but not a specific business result.

By accountability, we mean that there is a promise to produce the results. In other words, the project is complete when the results are visible, which means that they also have to be measurable.

The problem is that most people do not take responsibility for the results they create within the project

structure and they get away with it. What if each person involved were willing to guarantee that they would produce the specific, measurable results that were determined and agreed upon at the beginning of the project?

You get the idea. Someone has to be accountable for the results.

5. Lack of a proven process

In our fast food, instant answer society, we tend to skip processes. We want the answers now and we are not always patient.

The first step is defining the requirements and specifications of the system. This is the most critical phase of any project. You have to understand the problem in order to solve it. An elegant solution to the wrong problem is useless.

At this stage, you must define precisely what the system will do in terms of the results that are expected, the cost, and the time required for the project. Sometimes people try to take shortcuts here and that is a huge mistake. Changing the requirements later in the development of the system can have a significant impact on the cost and its ultimate outcome.

You also must have agreement from all stakeholders on the requirements. A stakeholder is anyone who has the ability to impose requirements on the system. This includes end users and the owner.

6. Lack of client involvement

Regardless of whether the client for the project is a multi-national company or the manager of your organization, or your immediate supervisor, lack of client involvement has proven fatal for many projects.

The reason why the project was given to you and your organization was the decision that it could be done better

by you than by them (whoever you and them turn out to be). But walking away from the project once it has been assigned is a foolish decision because things rarely go exactly as planned. Moreover, without client involvement, most of the people on the project team do not feel committed to the project – it is just another day's work for another day's pay.

If a project is to be a success, both the project management team management and the client need to be involved from the start and continuously throughout the project. This requires time and effort, and when the people in a business are already stretched, finding time for a new project is not high on their priorities. But letting a project run unchecked or assuming that everything will turn out exactly as planned will often times prove fatal.

7. Unrealistic time scales

Allowing an inordinate amount of time for a project to "eat up budgets" or waiting until the last minute and creating "crash" projects have the same dilatory effect – disaster.

Based on the statistics for successful projects, it seems that project time scales should be short, which means that larger projects should be split into modular sub-projects. There are always problems with this approach, but the benefits of doing so are considerable.

Effective project management conscientiously considers the volume of work that needs to be done to ensure delivery on time and within budget. This includes reviewing all project plans to see if they are realistic, and to challenge the participants to express any reservations they may have with it.

8. Scope creep

Scope is the overall view of what a project will do or be when it is completed. Scope creep is the insidious growth in

the scale of the project requirements during the life of a project.

As an example, your project team has been tasked with developing a software system which will hold customer records, then someone decides it will also deal with customer bills, then these bills will be provided on the Internet, and so on and so forth.

Of course, all the functions will have to be delivered at one time, therefore affecting time scales, and all will have to have detailed requirements. The management team must be realistic about what it is they want and when, and stick to it.

9. No change control system

Despite everything, change is happening at a faster rate than ever before. So it is not realistic to expect no change in requirements while a project is under way. However, uncontrolled changes play havoc with a project under development and have caused many project failures.

This emphasizes the advantages of shorter time scales and a modular, phased approach to project management, so that change has less chance to affect the development of the overall project. Nonetheless, change must be managed like any other business factor. The business must evaluate the effects of any changed requirements on the time scale, cost and risk of the project.

10. Poor project standards

Whatever else the project does during the course of development, when it is completed and ready to be delivered to the client, it must do what was promised at the onset.

The project team will perform interim tests, reviews, and modifications during the project's life to make sure that what they are doing leads towards the project's success, but

eventually the client must determine if what is being delivered meets the business requirements.

However, the final sign off by the client often fails to catch many faults before a project is declared complete because:

○ The original project requirements were inadequately defined and cannot be tested.

○ The sign-off process is not properly thought out or of little interest to the people doing it and the project results are not thoroughly examined.

○ The client does not know what they are really supposed to be looking for.

○ The client allows inadequate time to evaluate the project results because the project is late.

The client needs to be an active participant in the acceptance of the completed project. To do so they need to establish good evaluation criteria for determining the acceptable "sign-off" of the project requirements, know how to evaluate the criteria, and have sufficient time to achieve the evaluation objectives.

Conclusion

These ten factors are not the only ones that affect the success or failure of a project, but in many studies and reports they appear near, or at the top of the list. They are all interlinked, but as can be seen, they are not technical issues, but management and training ones. This supports the idea that ALL projects should be treated as business projects.

THE SPEED SCHEDULING™ METHOD OF PLANNING A PROJECT

Once you become comfortable with the concept of **Common Sense Project Management™,** you will find it easy to plan all of your events without concern for the system you use.

The fastest and easiest way to accomplish your planning is with a five-step **Speed Scheduling™** process that will get your project committed to paper in the shortest amount of time possible. This process skips all of the unnecessary elements and jumps straight to the heart of the planning.

Planning

The first step is the planning itself, so here is the **Speed Scheduling™** method of planning a project

1. Select a finish date for the overall project.
2. Define the tasks and estimate a cost for each one.
3. Estimate a time required for each task and post them on a time line.
4. Establish a start date.
5. Negotiate and/or evaluate the tasks to fit the required schedule.

The following sections explain the five elements.

Speed Scheduling™ Task #1: Select a finish date

Virtually all projects have an anticipated or required completion date. The selection of this date should take into account the ultimate objective of the program while looking at anything that will allow some flexibility if needed.

For example, Asian toy manufacturers know that if they are going to show their new toy designs in the United States at the New York Toy Fair™ on February 14th, then the new designs, literature, and personnel must be on an airplane by the first of February. This is because they have to ship everything (and everybody) to New York, clear customs, get the prototypes and new designs to the Toy Mart, and get everything set up and checked out before the buyers start to arrive on the 9th or 10th.

Since there is NO flexibility on these dates, everything connected with the Toy Fair™ show works backwards from this date.

On the other hand, following an outstanding acceptance of a new product, an Asian toy manufacturer may have a very "tight" tooling and production cycle on a new toy with accompanying delivery requirements in the United States.

If the initial planning is based on sea freight, "time compression" might be achieved by putting the product in the air for delivery to the United States. (There is, however, a cost tradeoff because putting products in the air is more costly than putting them on the water.)

Speed Scheduling™ Task #2: Define the tasks and estimate a cost for each one

Following the brainstorming session (as defined on page 53), you should have a list of tasks that need to be accomplished.

Remember that EVERYTHING connected with a project (even if it is done by volunteers) has some sort of cost

associated with it. (I mention volunteers because the costs have to do with money and staff hours. Volunteer organizations are famous for "burning out" their members and this will cause a project to fail as quickly as anything else.)

Tasks or elements of the planning process have expenditures in time, money or both and will ultimately fall into three categories:

(a) Research

These are the tasks required to precisely figure out what tasks need to be accomplished to define such things as rules, regulations, specifications, standards, and other related elements that affect the overall planning process.

For example, if you are fabricating children's toys, you will need to know the safety and packaging standards that will ultimately be used to provide the acceptance standards for the product. Understanding the compliance requirements, where to get them, how much they will cost, and what, if any, special tooling or test requirements will be needed to be implemented are essential components of a successful plan.

(b) Planning

The project management process itself is a time consuming element. However, progress meetings, specification reviews, budget sessions, and meetings with vendors, and other related tasks are all integral parts of the overall process and must be planned for or they will be forgotten – usually with negative consequences.

For example, if your new toy product requires that you meet with several tooling vendors to explain the concept and obtain quotations, you will need to plan for the meeting times, people on your staff who need to be in the meetings, travel time and expenses if needed.

Each meeting requires time that must be factored into the overall schedule and every person involved represents an expenditure of time and money (their time needs to be accounted for in terms of money).

This step is the actual commitment of the tasks, budgets, and responsibilities to paper so that everyone involved knows what needs to be accomplished. Do not forget the "things" involved with the project cost money and people's time has to be compensated too. As a result, where you purchase parts and labor has a heavy bearing on the component costs. Use the sample sheets in this chapter to calculate the costs of parts and labor for each task involved with the project.

For example, placing an ad in a Taiwan trade journal is far less expensive than a magazine in the UK, Germany or the United States. Labor in a particular Asian country might be less expensive than in another but because of "favored nation status", it may end up costing more to ship to the United States because of duties and tariffs.

All of these considerations must be measured when making the decision as to what will finally be included in the project's bill of materials.

(c) Implementation

Once the project has been planned and all of the tasks have been defined, it is time to actually accomplish something.

This is where the project actually "takes wing" and each task, expenditure, and result are monitored and recorded so that all the parties involved can stay current with the overall progress and head off problems before they become too serious to be fixed.

Do not forget to schedule in the project review and budget meetings as a part of the overall plan. Frequent progress reviews will help keep everyone in the loop and are as important a task as the production of the project itself.

Speed Scheduling™ Task #3: Estimate a time required for each task and post them on a time line

Everything connected with the project will have a time element connected with it. This portion of the process actually requires that you consider the following things:

○ How long will the task take to complete?
○ What, if any, other tasks must be completed before you can start on this one?
○ What resources are you waiting for before you can start each task?

Do not forget to include those tasks that appear to have "zero time" connected with them. These include things like getting a signature or issuing a purchase order. Even though they do not take a significant amount of time, they must still be entered as an event if they are critical to the success of the project.

For example, a manufacturer in Taipei is assembling an electronic assembly for export to Germany. The components are all multi-sourced except for the custom masked microprocessor, which is being fabricated in Japan.

Since everything else in the assembly are standard components or can be obtained from multiple sources, this assembly task is pretty much self contained except for one item – the critical component, the microprocessor, which has **no second source**. Therefore, the assembly task can ONLY begin after the microprocessor has been received and tested in Taipei.

Once you have determined the actual assembly time you can create a time line and put it on the overall timing chart but ONLY after the microprocessor has been received.

Continue to put all of the tasks and their time lines on the chart where they fall in the chronological sequence so that everything required is now visible on a single document that is easy to access.

Speed Scheduling™ Task #4: Establish a start date

It may seem silly to establish a start date after the finish date but it is the best way to create a workable time line that has the greatest chance of success.

You will probably discover that once you establish the start date, many of the task time lines do not seem to make sense and that is what this part of the process is all about – getting everything laid out so we can review what seems to be working and what is not so we can make adjustments.

One or more of the following usually determines the start date for a project:

(a) Approval of the plan

If your organization is like everybody else's, you do not operate alone. You have to get some kind of approval for the plan once you have finished drawing it up. Unfortunately, your priority in getting the plan approved does not always coincide with the priorities of the approving authority and the end result will ultimately be some sort of delay in the start of either the overall project or certain elements within it.

(b) Approval of budget money

No matter what we do, we cannot seem to get around the fact that somebody else controls the purse strings and has to "sign off" on the proposed expenditures for the project. Once again, the person who is required to approve the money may not be as motivated as you are to get you the approval immediately and this can also cause a delay.

(c) A defined event

The most obvious impediment to starting a project is the approval of the project, and these items include such things as government approval (or requirement) of a particular

standard, the passage of laws that affect the necessity or importance of the project, or approval of a budget item that will ultimately fund the project's efforts. However, there are often other outside influences that include the successful completion (or failure) of a related project, like the availability of personnel, tools, facilities, or equipment required to effectively accomplish the project's ultimate goals.

(d) An organizational decision

For example, a family is a type of organization and if the family decides that next year they are going to get the entire family together to celebrate *Ching Ming*, the ending date is fixed and may not be changed.

The amount of time, costs, and tasks required to contact the family members, arrange for transportation, and get everybody together, however, have some degree of flexibility and can be modified to accommodate budget limitations, people's physical capabilities to attend the event, and considerations for accommodations once the entire group has been assembled.

Speed Scheduling™ Task #5: Negotiate and/or evaluate the tasks to fit the required schedule

Chances are that the start date, the times required for the different events involved, and the finish date do not line up, so here is where we start to negotiate the elements and slide things around to "make them fit".

As you start to refine this list you will have to make certain concessions to account for time, money, availability of personnel, and inflexible dates. Do not be afraid to be flexible wherever you can. Most projects have a certain number of inflexible elements and those cannot be changed – but everything else can.

If you discover that the tasks, budgets, times, or personnel availability are truly impossible to achieve, you will have an immediate indication that the project MUST be redefined to match the realities that control it.

For example, packaging costs can be a shock to offshore buyers because their products must withstand the rigors of international shipping and a tremendous amount of unsupervised handling. If the project is truly cost sensitive, you may be required to find a less costly packaging solution to bring the overall product costs back in line with the client's requirements.

Brainstorming
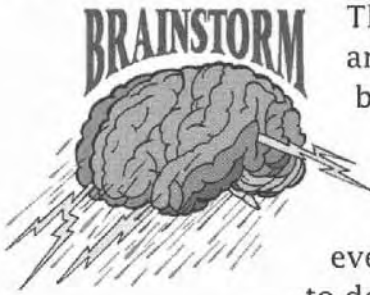
The five elements described above are usually accomplished in a single brainstorming session that is nothing more than an open discussion where all the involved parties "throw out" anything and everything they can think of that has to do with the project.

The session is usually scheduled and conducted after you have defined the project. Gather the project team members together for an initial planning session and determine and/or accomplish the five *Speed Scheduling™* tasks.

As you gather ideas from the attendees pay close attention to the fact that the ideas brought forth will eventually fall into one of three categories of tasks:

1. Research into what is involved or required.
2. Planning and budgeting of the project tasks.
3. Implementation of the project tasks.

Here are the proven ground rules for effectively conducting a brainstorming session:

1. Select an objective facilitator

It is NOT always a good idea to have the team leader facilitate the meeting if the person is going to be deeply involved with the project. His input may not be as objective as it should be and if he is the one who is controlling the process, certain valuable ideas may be rejected too soon.

The facilitator has the responsibility of keeping the process alive and on track. The attendees will usually want to enter into detailed discussion of ideas, lose interest, or have immediate considerations. The process works only if the facilitator keeps everybody focused on the process and puts off the other elements until the appropriate time.

2. The process also requires a chronicler (or a person to write down the ideas as fast as they are offered)

There are some tips for getting everything written down and not miss anything:

- Have someone besides the facilitator do the writing.
- Have two or more people keeping the notes.
- Have a recorder running during the entire process so that any good ideas, no matter when they are offered, are not missed and can be reviewed and incorporated into the plan.

The process begins with stating the objectives of he project and then asking for inputs from the members present. Here are the rules for a brainstorming session that should be posted in plain sight for everybody to see and abide by:

- List all ideas offered by group members.
- Do not evaluate or judge ideas at this time.
- Do not discuss ideas at this time except to clarify understanding.
- Welcome "blue sky" ideas. It is easier to eliminate ideas later.

O Repetition is okay. Do not waste time sorting out duplication.

O Encourage quantity. The more ideas you generate, the greater your chance of finding a useful one.

O Do not be too anxious to close the process. When a plateau is reached, let things rest and then start again.

Make no judgements and allow no discussion at this time – that comes later!
Make sure that the facilitator continues to encourage the group's participation until every possible idea has been exhausted.
Right now, all we want are as many thoughts and ideas as we can come up with because we know from historical precedent that it is NOT the things that are in a project plan that cause the most problems – it is the things that get left out!

3. Refine the task list

Once you have burned out everybody's brain and have pages full of notes, ideas, and suggestions, it is time to organize them into something that we can actually use to manage the project.

Start by dividing the different ideas into the three primary categories of tasks:

O Research into what is involved or required.
O Planning and budgeting of the project tasks.
O Implementation of the project tasks.

Next, refine the list into a total number of TOP-LEVEL TASKS to a **maximum of ten for each category**.

O Research into what is involved or required.
O Planning and budgeting of the project tasks.
O Implementation of the project tasks.

If you find that you have got more than ten top-level tasks, you can start to make a sub-level list for each of the

ten tasks. These sub-lists should not contain more than five tasks each because if your overall project task list (top-level and sub-level) has more than fifty tasks in total, there is something wrong with the plan.

Historical evidence points to the failure of projects that are overly complicated, micro-managed, or just plain "paper and report heavy" so we want to avoid these pitfalls wherever we can.

The concept of successful project management is to break its actual operation and more importantly, the reporting of the progress and problems, into different tiers of responsibility. If you do not, you will have major meetings haggling over inconsequential things that are best handled at the committee or department level.

For example, getting the "best price" on parts for a project may be critical to the overall financial success of a project but unless it truly affects everybody involved, it is a waste of time to be reporting, monitoring, and discussing the progress of the acquisition of every part, piece and component in the project management review meetings. This is an embedded function that belongs to the purchasing department and the ONLY time ANYTHING should be mentioned in the primary project meetings, reports, or planning sessions is if something is out of control and requires the assistance of others, e.g. when facing an over budget or severe time delays that affect other tasks on the project list.

When the lists of tasks get too long, it is an indication that:

O The project is extremely complicated (in which case you might be a candidate for a more sophisticated and detailed form of project management).

O It is more likely that you need to break the task list off and give it to the people who are responsible for the task and have it become a part of the committee

or group actually doing the work rather than having each element become a major reporting element of the management plan.

O That you have chosen an individual or group to be responsible for the successful completion of this task that is incapable of handling the tasks without major supervision. If this occurs it is time to find different people to handle the requirements.

Example:

Task List

Task #	Description of tasks for research into what is involved
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

Optional – break down each top level task to a **maximum of 5 sub-tasks**

Remember: "Anything over 50 tasks and sub-tasks tends to be a micro-managed project and becomes cumbersome!"

This does NOT mean that a project will always take less than 50 tasks and sub-tasks, but for purposes of the master plan, the number for the overall project should be kept to a

minimum to eliminate complexity. What a given individual, group, or committee has to handle to get a particular task or sub-task accomplished is an entirely different set of requirements.

If you jump ahead to Chapter 9, you will see how a brainstorming session progresses from the inception of an idea through the logical insertion of all the considerations on a working time line.

SCHEDULING
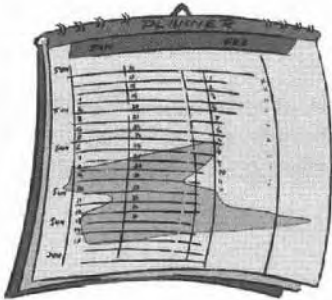
Once you have decided on the tasks to be accomplished, you need to put them on a "time line" so you can see what starts and stops when and how they are related to each other.

A task analysis matrix will help you get started by listing all the tasks you decided on in the brainstorming session in a logical sequence of events. You can make it as simple or as complicated as you feel necessary by adding such items as what tasks must be accomplished first before a new one can begin or whether there is some dead time known as "slack" time in the task because we are waiting for another one to catch up.

You can also create three separate task schedules for the three different phases (Research, Planning, Implementation) or you can integrate all of them into one master schedule – whichever method that seems to work the best for you and your organization.

Whatever you decide, make it comfortable
and easy for you to use.

Task Analysis Matrix

Throughout this book, you have seen simplicity stressed as one of the best ways to make sure that projects actually turn out the way they are supposed to. Like other forms in this book, the task analysis matrix shown below is designed around the idea that the more complicated you make a form or system, the more people may become overwhelmed or confused and not use it.

Always keep in mind that if you need more information you can always add it but if you make it simple and easy to understand, it will be less intimidating and more likely be filled out and used.

Task Analysis Matrix

#	Task Description	Start Date	Finish Date	Estimated Duration	Prior Tasks to be Completed
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

GANTT Charts

GANTT charts are a form of timetable or milestone scheduling chart. They are very popular because they are easy to construct and can be changed without a lot of trouble.

A GANTT chart is a horizontal bar chart that graphically displays the time relationship of the steps in a project. It is named after Henry Gantt, the industrial engineer who introduced the procedure in the early 1900s.

It is a series of lines that represent the time it will take to complete each defined task in a project. Once the duration has been determined, the line is placed on the master time line chart and its location and length give a graphical representation of when the task starts, how long it will take, when it will end, and what else is happening at the same time.

Incidentally, many people prefer to use the ultra-complex PERT (Performance, Evaluation, Review, Testing) charts for their project management programs when in most cases, they are totally "overkill" and unnecessary.

Always remember that PERT charts were designed to effectively develop a plan. GANTT charts were intended to communicate the plan. The important difference is that Gantt charts focus on when things occur while PERT focuses on how tasks relate to each other.

The simplest way to create a GANTT chart is to list the steps required to complete a project down the left hand side of a piece of ruled paper.
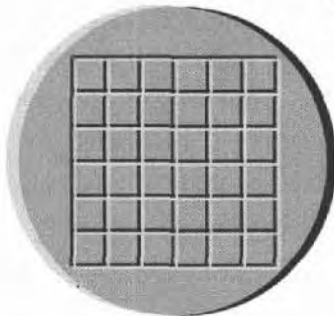
Along the bottom of the paper, put a time line that represents the estimated overall duration of the project in the appropriate increments, e.g. days, week, etc. Estimate the time required for each step and draw a line across the chart for each step, starting at the planned beginning date and ending on the completion date of that step.

When it is finished, your GANTT chart will show you the minimum total time for the project (assuming that everything goes as planned), the planned sequence of tasks, and which tasks will be going on at the same time.

Once you have the chart drawn out, you will be able to see what tasks are being handled simultaneously with others. This allows you to reassess when certain tasks or allocations of staff or equipment might be moved to accomplish a saving in resources or a shortening of the time required.

The usefulness of a GANTT chart is directly proportional to how accurately the actual progress of the project is monitored and how often the chart is updated and distributed to all of the involved parties so they can see what is actually happening compared to what was planned.

The simplest way to do this is by drawing a line in a different color below the original line to show the actual beginning and ending dates of each step. This allows you to quickly assess whether or not the project is on schedule.

There are several ways to create them including software programs and some whiteboard wall charts that allow you to write the tasks on a strip of paper and then pull out strings or tapes to indicate the duration of the tasks.

Here's what a GANTT chart looks like for a simple project like getting packed for a trip:

Task	9:00	9:30	10:00	10:30	11:00	11:30	12:00
Decide what you are going to do on the trip	░	░					
Decide what clothes you will need			░				
Make a list of the clothes				░	░		
Remove clothes from closets and drawers, and put on bed					░	░	
Get suitcases					░	░	
Pack suitcases					░	░	
Go and have fun							░
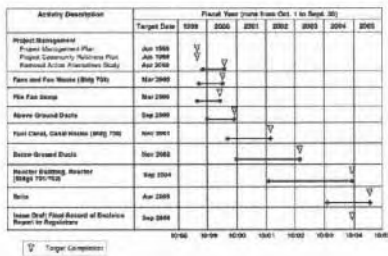
The darkened squares indicate the time frames involved with each of the tasks and by rearranging the tasks based on their starting times, we have a form of "flow chart" based on time that reads from left to right in a chronological sequence.

These charts are easy to read at a glance and are an immediate indication of where we are in the overall progress of our project.

When used as wall charts, the tasks that have been accomplished are usually highlighted or filled in with a color to indicate completion. By comparing the "colored" squares to today's date, we have an immediate indication of whether we are ahead, behind, or on schedule as planned.

Do not be afraid to post the tasks and then move them around as needed to make everything come into alliance with the project's budgets and timing requirements. Remember that successful project management is a combination of planning, implementation, and constant "reshuffling" of priorities to make the overall project successful.

Cost Estimate Sheets: Eight Helpful Budgeting Tips

1. Avoid scheduling people at **peak times.** Efficiency and production suffer when people are loaded at maximum levels for long periods. Choose instead to load at 90 percent.

    A simple way to do this is to calculate the hours you actually feel it will take to get the job done and multiply by 1.1. For example, if it takes 10 hours for one person to do a job when loaded at 100 percent capacity, allow 11 hours for completion of the work (10 hours × 1.1 = 11 hours).

2. Determine if your organization uses **overhead and loaded wages** to budget. Loaded wages are those which reflect the cost of benefits and bonuses as well as simple labor costs. If you budget at regular wages when loaded wages are used, you will run short of money.

3. Calculate your costs at the **task level.** This is the level at which individual responsibility is assigned and it is the easiest at which to calculate costs.

4. Compare your budget figures to your work **breakdown structure and planning budget.** This ensures that all items will be covered.

5. Include **support task charges,** such as what other departments charge for their services. Do not forget about shipping and handling charges and applicable taxes.

6. Match **tasks and budgets** up front.

7. Use the **cost estimates** to manage expenditures.

8. Plan for the **unexpected.** Murphy's Law applies to budgets as well as to time estimates. Things usually cost more than expected, so expect it.

Project Resource Estimator Worksheet

Materials Required	Quantity	Unit $	Total $
Total Material Cost			

Labor Required	Days	Rate	Total
Total Labor Cost			
Total Project Cost			

Project Planning Sheet
(A sample grid to be filled in for your specific needs)

chapter
9

LET'S PLAN A SAMPLE PROJECT

Now that you have been shown the basic elements of common sense project management, here is a typical example of a project that any of us might be asked to manage. It really does not matter what kind of an organization you belong to or whether you are in Singapore, Hong Kong, Taiwan, or Kuala Lumpur – the event and the tasks surrounding its success are usually always the same.

Here Is The Situation

Your firm has just received a huge contract due to the efforts of your best friend. As a reward for his accomplishments, he has just been promoted to vice-president of the firm and you have been assigned the task of organizing a formal black tie reception and dinner to celebrate the occasion. You have been advised of the following criteria:

1. The event must take place within 3 months.
2. You have been given a budget of $25,000 that you can spend for the event.
3. You have been given the basic guidelines for the list of guests to be invited.
4. You have been told that you can use any member of your current department to help you as long as it does not interfere with your current projects or their outcome.

Speed Scheduling™ Step 1

Conduct an initial brainstorming session to decide what needs to be done. At this session with your staff, the following items were "thrown up" for consideration:

- Select date for event
- Check date for conflicts
- Select location
- Get quotes on location
- Choose people to invite
- Compose invitations
- Get quote on invitations
- Print invitations
- Address invitations
- Mail invitations
- Select menu
- Get catering quotes
- Select wines
- Select music
- Live music or DJ
- Get quotes on music
- Make reservations
- Manage RSVP list
- Plan and schedule entire timetable for the event
- Arrange for guest speakers
- Professional photographer – get quotes
- Decide on a gift for the guest of honor
- Get promotion plaque engraved
- Decide on table decorations, flowers, etc.
- Get quotes on table decorations
- Determine if special foods are required for attendees
- Final decision on guest count
- Establish preliminary budget
- Decide on theme and color scheme
- Determine the number of people needed to accomplish the project
- Seating arrangements
- Special banner
- Signs for exterior of event
- Facilities
- Menus

○ Parking
○ Location
○ Map to event
○ Web site posting of event information and map

○ Availability of key people to attend the event

Speed Scheduling™ Step 2

Divide the items from the brainstorming session into three categories:

○ Research
○ Planning
○ Implementation.

Research	Planning	Implementation
1. Select date for event	11. Get quotes on facilities	28. Choose facility
2. Check date for conflicts	12. Develop guest list	29. Make reservations
	13. Compose invitations	30. Select wines
3. Are special foods required?	14. Get quotes on invitations	31. Select menu
	15. Research menu	32. Order table decorations
4. Number of people on project team	16. Get menu/catering quotes	33. Manage RSVP list
	17. Get quotes on music	34. Plan and schedule entire event
5. Facilities required including menus, parking, and location	18. Arrange for guest speakers	
	19. Get quotes from photographers	35. Order gift for guest of honor
6. Availability of key personnel to attend the event	20. Get quotes on gift	36. Order promotion plaque
	21. Get quotes on promotion plaque	37. Order signs and banners
7. Live music or DJ?		38. Design map to event
8. Decide on gift for guest of honor	22. Decide on table decorations	39. Put map and invitation on company web site
9. Special color scheme or theme?	23. Get quotes on table decorations	40. Order special gift
	24. Seating arrangements	41. Get the gift
10. Is special AV equipment needed?	25. Special signs and banners	42. Contract with facility
	26. Final decision on guest count	43. Send deposit checks
		44. Send final checks
	27. Finalize quotes and compare to budget	45. Print invitations
		46. Address invitations
		47. Mail invitations

Speed Scheduling™ Step 3

Estimate how long each task will take in days and put it in the columns after the task.

Research	Time (days)	Planning	Time (days)	Implementation	Time (days)
• Select date for event	1	• Get quotes on facilities	14	• Choose facility	30
• Check date for conflicts	1	• Develop guest list	5	• Make reservations	30
• Are special foods required?	14	• Compose invitations	1	• Select wines	1
		• Get quotes on invitations	3	• Select menu	1
• Number of people on project team	1	• Research menu	14	• Order table decorations	1
		• Get menu/catering quotes	3	• Manage RSVP list	90
• Facilities required including menus, parking, and location	14	• Get quotes on music	3	• Plan and schedule entire event	90
		• Arrange for guest speakers	21	• Order gift for guest of honor	1
		• Get quotes from photographers	3	• Order promotion plaque	1
• Availability of key personnel to attend the event	3	• Get quotes on gift	1	• Order signs and banners	1
		• Get quotes on promotion plaque	1	• Design map to event	2
• Live music or DJ?	1	• Decide on table decorations	5	• Put map and invitation on company web site	3
• Decide on gift for guest of honor	5	• Get quotes on table decorations	5	• Order special gift	14
		• Seating arrangements	10	• Get the gift	1
• Special color scheme or theme?	5	• Special signs and banners	1	• Contract with facility	1
		• Final decision on guest count	45	• Send deposit checks	3
• Is special AV equipment needed?	5	• Finalize quotes and compare to budget	14	• Send final checks	3
				• Print invitations	14
				• Address invitations	3
				• Mail invitations	1

Speed Scheduling™ Step 4

Estimate a cost for each item that involves money. This includes both purchased items and labor services. Do not worry about being completely accurate. Remember that this is an estimate and the final costs will come after you get the firm quotations.

Materials Required	Quantity	Unit $	Total $
Meals for 150 couples	300	$50	$15,000
Wine for tables	300	$10	$3,000
Promotion plaque	1	$50	$50
Special gift for guest of honor	1	$250	$250
Signs and Banners	10	$10	$100
Table decorations (10 guests per table)	30	$30	$900
Printing of invitations	300	$2	$600
Postage for invitations	300	$1	$300
Miscellaneous supplies	1	$300	$300
Total Material Cost			$20,500

Labor Required	Days	Rate	Total
Live Music	1	$1,500	$1,500
Photographer	1	$500	$500
Addressing of invitations	3	$100	$300
Rental of AV equipment	1	$1,000	$1,000
Total Labor Cost			$3,300
Total Project Cost			$23,800

Speed Scheduling™ Step 5

Put the tasks on a time line. Normally, the research tasks precede the planning tasks and the actual implementation tasks come last. Be prepared to adjust the events on the time line to fit the tasks and the actual times involved. Make special note of tasks that naturally follow other tasks, e.g. you must first get a quote and then you can place an order.

Task Description	Weeks													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1. Select event date/check conflicts	■													
2. Check special food requirements	■	■												
3. Select project team	■													
4. Decide on facilities requirements	■													
5. Check availability of key personnel	■													
6. Decide on live music or DJ	■													
7. Decide on gift for guest of honor	■													
8. Decide on special theme and colors	■													
9. Define any special AV equipment	■													
10. Get facilities quotes		■												
11. Develop guest list		■												
12. Compose invitations/get quotes		■												
13. Research menu		■	■											
14. Get menu/catering quotes			■											
15. Get music quotes			■											
16. Arrange for guest speakers		■	■											
17. Get quotes from photographers		■												
18. Get quotes on special gift		■												
19. Get quotes on promotion plaque		■												
20. Decide on table decorations			■											
21. Establish seating arrangements			■											
22. Define/design signs and banners				■										
23. Make final decision on guest count								■						

Task Description	Weeks													
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
24. Finalize quote/compare to budget			░											
25. Choose and contract with facility					7.5k								7.5k	
26. Make reservations					░									
27. Select wines					1.5k								1.5k	
28. Select menu					░									
29. Order table decorations					$450								$450	
30. Manage RSVP list					░	░	░	░	░	░	░	░	░	
31. Plan and schedule entire event	░	░	░	░	░	░	░	░						
32. Order gift for guest of honor				$250										
33. Order presentation plaque				$50										
34. Order signs and banners				$100										
35. Book live musical group				$750							$750			
36. Design map to event				░										
37. Put map on web site				░										
38. Print invitations			$300	$300										
39. Address invitations					$300									
40. Mail invitations					$300									
41. Send deposit checks					░									
42. Hold event												░		
43. Photographer shoots event												$500		
44. Send final checks/close accounts													1.3k	░
45. Submit final accounting reports														░
Cash flow for project in $1,000's				0.3	1.5	10						1.3	11	23.8

Speed Scheduling™ Step 6

Put the costs on the time line and add them along the bottom to show the cash flow during the life of the project.

Speed Scheduling™ Step 7

Adjust the times, deadline dates, and cash flow to match your initial budgets and estimates.

CONTROLLING THE PROJECT

Projects tend to develop like children and assume a life of their own. And like children, if they are unsupervised, they get into trouble.

Another thing to keep in mind is that few, if any, projects operate exactly as planned. However, we can put control systems in place to help ensure their success in spite of Murphy's Law.

Murphy's law: "Anything that can go wrong, will go wrong, and at the worst possible time."

United States Air Force Captain Murphy was not a pessimist but he was a realist, and because of his approach towards airplanes, fewer of them fell out of the sky than before he introduced his "cautious optimism" into the world of logistics, planning, and aircraft maintenance.

The following considerations will help you to plan for Murphy's law and make sure that things stay on track in spite of the inevitable disasters that accompany the best laid plans of any project.

O   Establish and maintain a consistent review cycle
O   Set-up a reporting system

Establish And Maintain A Consistent Review Cycle

"People don't do what's expected – they do what's inspected"
– Old saying

Once a project has been defined and scheduled, it is critical that a regular system of reporting and review be established and maintained. **If the system is not followed, the chances of a project's success go down rapidly!**
Image this scenario:

O You have just assumed the role of project manager and set up the master schedule.

O The project is supposed to take three months and you have declared that each Tuesday morning, at 8:00 am sharp, there will be a project review meeting in your office.

O All of the task managers must be in attendance with their weekly progress reports so that the project can be reviewed and any needed corrections can be made.

O For the first two weeks, all of the task managers diligently prepare their reports for delivery the next morning and you conduct the meeting as planned but on the third week, you discover that you have another meeting that you need to attend that conflicts with the regular project meeting.

O You decide to attend the new meeting and did not bother to inform the task managers that you will not be there.

O On Tuesday morning they arrive at your office as usual but you are not there because you had something else that was more important than the meeting.

O What is worse is that you did not tell them that the meeting was not going to occur as usual or planned and they did all the preparation work for it.

○ The following week, the chances of everybody showing up is greatly reduced plus many of the task managers are not going to even bother to prepare their reports because they now believe that you do not really care about them or the success of their project.

Most of us have had this experience and there is an important lesson to be learned from this example: *"Nothing will cause a project to fail faster than a lack of consistency."*

The people involved are looking to you for leadership and example. As soon as you create an atmosphere of inconsistency and doubt, the rest of the team begins to adapt the attitude that if the project is not that important to you, why should they expend their best efforts on something that you do not respect enough to support by attending the meetings that you scheduled and required that they support?

The solution to this problem is simple but often overlooked – get a qualified replacement to fill in and handle the meeting for you. This solution solves the problem as outlined above and simultaneously reinforces your commitment to the project by demonstrating that you consider it important enough to hold the meeting as scheduled and have sent someone to cover in your absence.

Never forget that the project is probably out of control at some level or another and any delay in getting feedback about problems may cause delays that are irreparable because they were not discovered and handled in time.

Another thing to take into account is that these review meetings do not have to be formal events. The important thing is to identify and correct problems and concerns before they become so big that the whole program is thrown out of sync.

Many organizations have discovered that if the meetings are scheduled as breakfast meetings and held at a local coffee

shop or hamburger stand, people who are required to attend and present their reports would actually look forward to it and do a better job of preparation. The meeting takes on the atmosphere of a "dinner meeting" and provides the attendees with a place to purchase coffee, tea, and food while the meeting goes on. It does not diminish the importance of the meeting and puts a kind of "special event" spin to it so that the attendees become more enthusiastic about it.

However, whether formal or informal, these reviews must be conducted and maintained on a regular basis to ensure that everything stays within reasonable control guidelines. Accurate notes and resolutions must be kept, decisions must be made, and plans for their implementation must be scheduled and budgeted.

"Applaud publicly and chastise privately." – Old proverb

Of equal importance is to remember that these review sessions are not supposed to be for chastisement or to single out individuals or groups for their lack of performance. They are to be used to point out impediments or stumbling blocks to the success of the project and then to develop a solution.

Remember that the three steps to solving problem are:

1. Admit that a problem exists

The ONLY way you are going to get people to admit that a problem exists is to provide an atmosphere that supports the idea that problems occur and the reason that the project team exists is to identify and solve them.

If the members of the project team start to believe that problems that occur that are a part of their responsibility will bring them ridicule, chastisement, and possible dismissal, they will immediately start to conceal the problems for fear of punishment.

This can become the greatest problem of all because most problems, if identified early on and handled immediately,

do not become insurmountable. However, if left unattended, many will grow to become major impediments to the overall success of the project.

"All jobs have problems. Your task is to decide which problems you want to be paid to solve."

The best way to handle this situation is to remind everyone involved that all projects have problems and their involvement in the project is required to identify and solve them.

2. Precisely and objectively define the problem

Back in the days when I was vice president of engineering in the toy business, electronic games and toys were in their early stages of public acceptance and we were competing with many firms for market share.

One of the biggest problems we had was getting the people in the company's review cycle to tell us exactly what was wrong with a product so we could correct it as soon as possible and satisfy the requirements of the buying public.

The single biggest source of frustration came from a pair of senior members of the marketing department who were intimidated by the technology because they had grown up in an era where toys and games were simple and now, such games and toys had become complicated and it scared them.

The problems lie in the fact that they had to sell the finished goods and refused to become familiar and comfortable with the changes in technology of the industry. The result was that whenever something did not operate the way they thought it should, then they would immediately tell us that the toy did not work.

It made no difference whether they were operating it improperly or that it might not have been designed to do what they thought it should do, or that the customer base

would have liked some additional features. They simply generalized the situation by saying that it did not work.

As you can imagine, this created a high degree of tension and interdepartmental rivalry which was finally resolved by confronting the marketing department outright and explaining to them that this was not a guessing game and that if they would not be specific in voicing their concerns, then we could not address their concerns.

This situation and attitude are not exclusive to the toy or technology industries – they occur whenever responsible people are overwhelmed or intimidated by the portion of the project that they are responsible to maintain.

They begin to produce non-specific complaints and reports that tend to "smokescreen" or mask the true project problems in an attempt to cover up the fact that they do not truly understand what is going on, how to define it, or how to fix it. **This results in an attitude called: "Let's fix the blame but not the problem."**

Logically, this does not fix anything and serves as a source of antagonism to other members of the team who are going to have to correct the inequities anyhow. In order to correct a problem we have to know that it exists and what, specifically, is wrong. Just saying that it does not work is detrimental and will not solve anything.

3. Develop a solution for the problem and implement it immediately

There is a philosophical reality in the old joke that says: "*Of course I want it solved now. If I had wanted it solved later, I would have brought it to your attention later.*"

Although the solving of an inequity might not really need to be handled immediately, it is in everybody's best interest to know that it exists so that appropriate corrective actions can be taken at a time and place that best suits the overall project's objectives, timing, and budget.

The sooner you can resolve a problem, the sooner you can get on with other things. Pay special note that nowhere in the three steps shown above does it say to chastise, blame, or belittle anyone.

The objective is to fix the problem, not the blame, because fixing the blame does NOT work. Instead, blame causes grief, dissension, and a lack of support and cooperation because human beings do not like to be belittled or reminded of their failures or shortcomings, especially in front of their peers and co-workers.

Set Up A Reporting System

Projects rarely proceed exactly as planned and you must know when your project veers from the prescribed course so you can adjust it accordingly.

1. Schedule project meetings and progress reports on a regular basis and stick to the schedule

As noted above, consistency in project review meetings is critical to the success of the project. Do not make the meeting an all day event. Your project team will have a lot of other duties and the meetings, although necessary, do not actually contribute to the completion of the project tasks.

Meetings, like projects, can take on a life of their own and if they are allowed to run unchecked, can become a part of the problem rather than a part of the solution.

2. Keep written reports within the S.I.S. guideline

- ○ Simple
- ○ Inclusive
- ○ Short

"The more complicated and comprehensive you make a form, the less people will understand and use it."
– Mike Rounds

The quote that is listed above is based on a lot of years of experience. It was bad enough when we had manual systems where copies and forms were created by hand. It has become something of a nightmare now that people can go "forms crazy" on a computer and create and generate mountains of paperwork with a single keystroke.

Maximizing the Effectiveness of Reports

- Reports may concern performance, schedule or costs.
- Reports should always be as brief as possible.
- Target the report. (Do not try to circulate one report to too many recipients.)
- Use pictures, demonstrations and models. (Do not limit the report to text.)

The Problems with Reports

- Reports may be inaccurate.
- Report writers tend towards unwarranted opinions.
- Reports are often no better than the judgment of the person preparing the report.
- Reports avoid direct exchange of information.

The members of the team are not interested in long, drawn out stories about the problems you are having with the project, either verbally or in writing. They do, however, need to know your progress and what, if any, problems you are having, so they can review them and offer inputs.

We have all sat through meetings where boring storytellers drag out and relate every sordid detail, including their personality problems with other members of the organization, that is causing their part of the project to fail. Some of them commit the story to a multi-page report and insist on reading it to the attendees of the meeting.

These individuals and their sordid tales have a negative effect on the group because it raises the boredom quotient in the room very quickly and opens the door for others to vent their frustrations on the group, a practice which does nothing more than waste time and create bad feelings and divisional attitudes between co-workers.

The simplest way to prevent these long-winded ramblings is to mandate that everyone use a simple reporting form to let others in the team know the status of the various tasks assigned to them.

Once the form has been distributed and reviewed by the team members present, questions can be asked and answered and if the report shows that there are no problems, the meeting can proceed to the next person whose tasks might need attention.

The sample form shown in this chapter is all you will need for 99 percent of all your project review meetings. It gives the reader the absolute necessities required to make a conscientious review of the project, and if more detailed information is needed, it can always be supplied.

3. Practice project and task accountability at project meetings

The dictionary defines accountability as an obligation or

willingness to accept responsibility or to account for one's actions.

The purpose of the project review meeting is to bring progress, problems, and accomplishments to light for the entire project team to see and review. It is also the place where we stand up and take responsibility for the work we have done, be it correct or incorrect.

The meeting place must be a place where the entire team functions as a team – not as individuals with independent tasks. When problems arise, and they will, be open to looking at what caused them and what can be done to solve them by calling on the resources of the entire team, not only the individual who is responsible for the task.

Team cooperation creates synergy or a condition where the whole is much greater than the sum of its individual parts. By fostering this team spirit the individual members embrace a greater sense of security knowing that "someone has their back" and that if they have problems there are others on the team who can and will assist them if necessary.

4. Avoid chastising people for bringing you bad news

"Every job has problems. You must decide which problems in life you want to be paid to solve." – Old proverb

Do not ever demean people for bringing you bad news about the project's progress. Remember, if the project did not have any problems, they would not need a project manager and most of the project team!

Having team members announce problems at the project meetings and getting the assistance of other team members is a positive occurrence and should be viewed as such.

It is a far better approach than having them try to hide the problems and hope that they will go away, which they usually do not. In fact what usually happens is that they get worse because they were not handled early on where the cause and effects scenarios were small.

We know that, problems occur and shooting the messenger, even if the messenger is the one responsible for the problem, will not solve it, but openly voicing it and asking for help will.

5. Check your progress reports thoroughly

This means knowing the status of the project in terms of:

- ○ Schedule.
- ○ Budget.
- ○ Potential problems.

A team member invested their time and energy to write the report and it is your responsibility to both review and understand what they wrote.

Remember that people do what is inspected, not what is expected, and if you do not bother to thoroughly review the reports, the team members will begin to get sloppy and important things will be left out.

Learn to "read between the lines" and question anything in a report that you do not understand or that looks like a problem that has been disguised.

Here are some open-ended questions that will help you gain important information that might not be volunteered by the report writer:

- ○ What persistent problems do you have and what is being done to correct them?
- ○ What problems do you foresee?
- ○ Do you need any additional information?
- ○ Do you need any additional resources?
- ○ Do you have any personnel problems now? What personnel problems do you anticipate?
- ○ What event could give you schedule difficulties?
- ○ Is there any possibility that your task could be completed early?
- ○ Will your task be completed within the allowed budget or do you anticipate some overrun?

6. Have all team members submit progress reports to show progress (whether they are having problems or not)

One of the things that begin to happen to projects is an atmosphere of complacency. This starts to show itself in the form of "non-reports" which is a situation where team members who are in the middle of a task or who have successfully completed a task do not believe that they need to report on it because they do not have any problems.

This attitude actually creates several other problems including:

O Setting a bad example for others on the team to not submit reports.

O Establishing an attitude of superiority rather than teamwork.

O Leaving a break in the paper trail that is a defined part of the project.

The paper trail is created and reviewed for a reason – so that the members of the team can get a relative idea of what is working, what is not, and what has to be done to make the project come out successfully. When any of the reports are missing it leaves a question as to the status of the project or task for that particular reporting period and can cause a waste of time and energy to find out what is truly happening.

7. Use a simple reporting form for all reviews

"The more complicated and comprehensive you make a form, the less people will understand and use it." - Mike Rounds

Use simple reporting forms for all elements of your project. If you need more detail, you can always add attachments. Always remember:

K.I.S.S. [Keep It Short and Simple]

The form shown below was created by an astute individual in the 1970s and will always be one of the most efficient project status reporting forms ever developed. It contains everything that a project team needs to know as a report and can be expanded in any area if and when it is deemed necessary. Feel free to copy and use it on all your projects.

Project Status Reporting Form

Name of Project: _____ **Date of Report:** _____

Person Reporting: _____

Task Description	Person Responsible	Current Status	Action to be Taken

Simple Considerations For Success

To ensure the timely completion of your project, you should examine the "what if's" that could derail its implementation and make some contingency plans "just in case".

1. What if a delivery of materials is delayed?

Most projects require "things" as well as labor and a conscientious thought process.

- O What materials are critical to your project and where are you getting them?
- O Can you get them from more than one place? (a 2nd source)
- O When do you need them?
- O How late can they be without completely disrupting the project?
- O If you cannot get them from more than one place, what monitoring controls and procedures have you put in place to help ensure their timely delivery?

For example, most high tech manufacturing projects, like those from US companies that sub-contract with Taiwan, Hong Kong, Singapore, and Mainland China, are dependant on components, like custom made, single chip microprocessors, from countries other than the one performing the final assembly and test. What will happen if world events restrict the manufacture or shipment of these critical parts? Have you investigated using another manufacturer or supplier that is not affected by these conditions?

2. What if a key member of the team resigns?

- O Do you have an immediate replacement for each key individual?
- O Have you trained or even advised potential replacements of the project's requirements?
- O If this is an all-volunteer project, where and how can you get a replacement for key individuals?

Church groups, social service organizations like **Rotary International®,** and company sponsored social events, like company picnics, are staffed by and depend on volunteers

for everything from planning through implementation. Since there is no financial compensation for the work, what incentive will you provide for someone to jump in and take over a project in the event that the volunteer who was working on the task or project decides to call it quits?

3. What if your supplier's union strikes?

○ Is your organization directly under the influence of one or more labor unions?
○ Are your major suppliers directly under the influence of one or more labor unions?
○ Are any of the goods, services, or critical resources directly under the influence of one or more labor unions?

You may look at this concern and assume that since your organization is not under the direct influence of a labor or trade union that it is not a concern, but do not dismiss it too quickly.

Many organizations in the United States overlooked this critical factor until the UPS strike hit the country a few years ago. This inability to move parts and pieces through a critical delivery service crippled and destroyed thousands of firms and delayed tens of thousands of projects.

Dock strikes cause on-time water shipments of goods to be held up at the receiving (and sometimes the delivery) point, rendering the efforts to get things manufactured on time and within budget virtually useless.

Have you investigated alternative methods for getting your critical tasks done that will circumvent the union labor consideration?

What If? What If? What If?

These questions can keep you awake at night. It helps to have a strategy for dealing with the most likely "what if's?" A "what if?" analysis can help.

To conduct a "what if?" analysis

1. Identify the critical tasks of the project. These are things and labor elements that will make or break the project or without which there is no possible way to complete the project as promised.

2. Select those tasks that will have the greatest likelihood of occurrence and the severest impact on your project and monitor them on a regular basis. By making a conscientious list of the most critical elements of the project, you will have a list of things that must be reviewed constantly so that if something happens to them, you will be in a position to do something to keep the entire project from being derailed.

3. Remember the Rule of 80/20 *(Pareto principle).* Vilfredo Pareto was an Italian economist who discovered that 80 percent of Italy's wealth was controlled by 20 percent of the population. The principle and percentages reflect the notion that most of the results (project management included) come from a minority of effort (or people, or input).

   If you look carefully, you will discover that 80 percent of the costs come from 20 percent of the parts and labor; 80 percent of the problems come from 20 percent of the tasks and the people involved with them.

   Review past projects (or ask the people who were involved in them) and look for similar or identical situations like the ones that you are embarking on. Locate the 20 percent problems and ask what events happened to cause these tasks to derail.

4. Once you have figured out what is most likely to go wrong, develop a contingency plan for each of the situations in the 20 percent.

For example, let us suppose that your project is a technical consumer item that requires instruction manuals to be translated into several languages.

If you review past projects and discover that you have constantly had a problem getting the client to submit detailed information to enable your in-house technical writers to create comprehensive instruction manuals in time for a certain delivery schedule, start as early as possible to extract as much information as possible and make the manual a "work-in-progress" so that as soon as the last bits of information are received, you can complete the task in a short period of time.

Control point identification charts

A helpful technique for controlling the 20 percent of the project that is likely to cause problems is to invest some time to think through what is likely to go wrong in each of the three project parameters. Then identify when and how you will know that something is amiss and what you will do to correct the problem if it occurs.

This will help minimize the times you will be caught by surprise as well as save time in responding to the problem. The simplest way to do this is to use a contingency review chart to summarize this information. Here is a sample of what the basic form looks like.

Project Contingency Review Chart

Name of Project: _____ Date of Review: _____

Person Reviewing: _____

Specific Area of Concern: _____

What are we concerned about?	What is likely to go wrong? (Be as specific as possible	How and when will we know that something has gone wrong	What do we plan to do about ut
Quality or performance standards			
Cost considerations			
Delivery or availability considerations			

Conclusion

A well-managed schedule will not guarantee the success of a project but maintaining and monitoring it on a regular basis will. Always remember that the most successful projects are never taken for granted and almost always owe their success to the team monitoring and heading off critical problems.

chapter
11

TERMINATING THE PROJECT

"There comes a time in every project when you shoot the engineers and release the product."
– In-house newsletter at Westinghouse

This is the project's "wrap-up" and if you think this chapter in unnecessary, I will simply assume that you have not been involved in a project that never seems to stop. As mentioned earlier, projects take on a life of their own and sometimes they refuse to die a natural death.

Terminating a project satisfactorily is nearly as difficult as starting a project because the awareness sets in that something that has become both comfortable and familiar is about to change by coming to an end. Even though a project may have been difficult, demanding, and frustrating, it has, nevertheless, become familiar to the participants.

Types Of Project Termination

There are four types of termination scenarios for a project. Each has its own unique characteristics and each characteristic needs to be addressed in an appropriate manner.

1. Project extinction

○ When the project has achieved its stated goals and purpose.

○ When the project has accomplished as much as it can given the current conditions and circumstances.

2. Project absorption

○ When the existing project is absorbed by, and becomes a new formal part of an organization.

3. Integration

○ When the project's defined tasks and goals become a standard part of a new or an existing operating system.

4. Termination-by-starvation

○ When a project lives in name only and receives no attention or funding.

1. Project extinction

Project extinction covers the two most common reasons for terminating a project.

The first is the most hoped for – the successful completion of the stated goals and objectives of the project. In others words, we have accomplished our mission. The second situation is frustrating, complicated, and requires a major decision on the part of the project manager to terminate the project for cause. Simply stated, this means that something has happened or changed that prevents the project from being completed within the original stated parameters.

For example, a plant in Taiwan has a contract to manufacture a "hot product" and it looks like the market will continue to grow. The project's goals are to double the production line capacity to meet the market's demand for the new product.

Unfortunately, mid-way into the expansion project, the market for the product drops and the client begins to cancel their orders for the product. Since the increased production capability is no longer needed, corporate management decides that the production line expansion project needs to be terminated.

What makes this decision so difficult is that there is always the possibility (or at least the hope), that the market will return and the increased manufacturing capacity will be needed. This mind set is accompanied by the possibility of needing the increased capacity, albeit not right now, so the decision to terminate the project becomes even more difficult.

2. Project absorption

Project absorption is where the existing project is absorbed by, and becomes a new formal part of an organization.

One of the prime reasons for business takeovers and buyouts is a process called *"growth by acquisition"* wherein a large business begins to absorb smaller or competing businesses that are related to, or advantageous for, their existing business. This process also includes the combining or merging of departments and groups within an existing organization. Usually, this includes the absorption of the competing organization's goods, resources, departments, personnel, processes, and projects.

Occasionally, where both organizations are involved in parallel projects, both may remain funded and operational to see which one is more likely to be of the greatest value to the new management.

More likely, however, one of the competing projects will be terminated for financial or political reasons. For example, if your organization has been working on an internally funded project to develop a new product and the acquiring organization already has a completed product or has an ongoing project in place that they have heavily vested in, your project, as a part of the subordinate group, will probably be terminated.

3. Integration

Integration is when the project's defined tasks and goals become a standard part of operating systems.

Acquisitions, mergers, departmental takeovers, and combining of two or more existing organizations, regardless of what they are, often brings similar or identical operating systems, projects, goals, and funding with them. Normal business policy dictates that if there is already a fully operational solution in place that management agrees is sufficient for the established goals of the project, then the project under development will probably be scrapped.

For example, if your organization is researching and integrating a new software system into your business for improving inventory control procedures for containerized cargo and you are acquired by another firm that already has a working system in place, your project will probably be terminated because it would be redundant to the new system that is now available to you.

4. Termination-by-starvation

Termination-by-starvation is when a project lives in name only and receives no attention or funding.

During the brainstorming and planning phase of a new project, several tasks or sub-tasks will probably be defined that are unneeded, unnecessary, or beyond the funding and/ or technical scope of the project. Sometimes, entire projects

are defined and planned but are never funded or approved for full operation.

The unfortunate reality about many of these tasks is that people are assigned and a lot of work is expended before someone comes along and formally stops the task or the entire project itself. Regardless of the reason, as soon as you determine that a project or task is unnecessary, you must terminate it immediately to prevent it from impacting other projects, tasks, budgets, or related elements.

So Stop Already!

There is a tendency, especially with projects that are progressing positively, to keep them around as a never-ending task. In environments where successes are scarce or where a lot of notoriety, public acclaim, or financial rewards are connected with a successful project, the tendency to keep "dead projects" alive is prevalent.

Watch out for this situation and terminate your project when the following happens.

1. The goal has been reached. When it is over, it is over. Stop working on the project, close it down, and get on with something else.

This is often difficult because we are so proud and happy with the accomplishment and everybody is satisfied with the results that we do not want to let go. It is sort of like being a child and not wanting to leave the amusement park because he does not want the happy feelings to end. Regardless of the situation, the project is over and we must move on.

2. The product is ready for production. If the project's goal is the development of a new product, and its ultimate goal was to get it ready for the production phase and turned

over to someone else, it is clear that it was never meant for you to work on it forever.

New projects, especially those that are destined for production and eventual review and usage by others, are somewhat like a child. We give birth to the idea and then work with it while it grows and develops.

When it is "of age" (ready to be released), it is hard to let go because for its entire existence, we have been its guiding influence and we are now concerned about what others will do to it or with it.

And, just like a child who is ready to leave home, we worry about its future and are reluctant to let it get away from us. Realistically, however, we have to do the best we can and let it be controlled by someone else.

3. The system is debugged – but before enhancements are made. This is a prevalent problem in today's rapidly changing world where new technologies or methodologies that will improve or enhance something are being made available to us at an ever-increasing rate.

The world in which we live is reinventing itself every one to five years, depending on the industry in which we are involved, which means that it is highly likely that our project may be obsolete before it is complete.

This is frustrating and yet it is too common to be ignored. The question is: when will your project be sufficiently ready enough to be released to the users?

The best and worst example is software development. In today's world of commercial and industrial software, programmers are usually tasked with a defined number of things that a program must do when it is completed and released for integration into the end user's system.

During the course of development, the programmers discover that with just a "little more work", they can make the software do several

other things that may be desirable to the end user but were not included in the original specifications. The problems encountered here include:

○ Additional time requirements that were not planned.
○ Additional resource requirements that were not budgeted.
○ The possibility of the new improvements or enhancements not performing as expected.

The ability of the project team to envision a better, faster, cheaper, or more efficient solution is an inherent characteristic of all well run and developed projects because as human beings we grow through our own learning experiences.

Even though the additional improvements or enhancements appear to be beneficial to the overall project, this kind of development is somewhat akin to a Chinese puzzle box where one box opens and inside, you find another, and another, and another.

The problem is to decide where to stop and let it go and usually the best place is when the original specifications and goals have been met.

4. When support is withdrawn. The example given above, about the phase out of a production line expansion, is typical of having the support withdrawn. Other examples are where a project is dependant upon government legislation or corporate policies that suddenly change, making the project, or a task associated with it, unnecessary.

For example, a manufacturer in Singapore is developing packaging for a product that is to be exported to Canada. The Canadian government regulations specify that all instructions must be in both English and French.

If the Canadian government decides that the packaging no longer requires the French translation, the decision to have instructions in a single language may be made and the need for the translation services ceases to exist.

Even if you believe that it would still be better to continue to include both (or multiple) languages in the instruction manuals, the client, based on changes in government regulations, will probably declare that a translation is no longer necessary and will probably want to renegotiate the contract to eliminate the charges associated with the task.

Phase Out Plan

Since the ultimate goal of a project is usually to complete it and turn it over to someone else, a structured phase out or "turnover" plan is essential to the overall success of the project.

This is as important a task as any other because in many cases, it includes the "buy-off" by the client which determines whether or not the project will be declared successful and possibly determine the payment for the work done.

A phase out plan may contain:

O   A checklist of phase out activities.
O   A phase out time line.
O   The disposition of team members.

1. A checklist of phase out activities

A checklist of phase out activities, including responsibility assignments, is important. These activities may include, but not necessarily be limited to:

(a) Project Performance - What was achieved and the reasons why

This includes all of the things that went right and the things that went wrong. When reviewing the things that did not work as planned or hoped, do your best to NOT assign blame. Instead, be objective and state the actual reasons why things did not go as planned and why.

There is always the possibility of this type of project, or one closely related to it, being done again, and having detailed, objective commentary as to why something did or did not work will prove invaluable in future assignments.

(b) Administrative Performance – A review of how well administrative practices worked

Notice that this specifically refers to the administrative practices and NOT to the administrators. The structure of the administrative element is the component we want to examine – not the personalities.

If there is an inequity in the administrative process, changing the individual(s) involved will not solve the problem, but identifying the true setback and correcting the inequity in future projects will.

(c) Organizational Structure – Identify modifications to help future projects

Was this the right team, the wrong group, or a questionable structure to be handling this particular project and why?

Many organizations create legacies that automatically dictate which department or group is supposed to handle a particular type of project without giving due consideration to the effectiveness of that group.

Since most of the world that surrounds us is in a constant state of change, it makes logical sense to question the expediency of "doing it the same way we have always done it" to find out if there might not be a better way to do it the next time.

(d) Project Management Techniques - Recommendations for improvements in future projects

This is the part where you get to put your feelings and opinions about the overall handling of the project that has ultimately resulted in the outcome as presented in writing.

This being said, make sure that you do not use this as a place to chastise individuals who made honest mistakes or who were improperly assigned to a task that was beyond their scope of capabilities. Even if the errors caused serious problems, point out the inequities without fixing the blame on a specific individual but instead, refer to them by their particular job or project function.

Future reviewers of this documentation probably will not know the individuals anyway and referencing them by name will only potentially create a feeling of ill will and possibly jeopardize their future with the organization.

If a negative review of a person's performance is warranted, it should be created and delivered to the appropriate authority as a separate document and not as a part of the project's phase out documentation.

2. Phase out time line

Most projects do not suddenly stop at a moment's notice. Usually, there are an entire series of tasks and events that take place before the project is officially considered closed.

Just like the other elements of the project have been plotted on a time line, so should the phase out activities because you will most likely have a series of resource allocation considerations and the world of physics has not changed since the writing of this book – one person cannot be in two places at the same time and two things cannot exist in the same place at the same time.

The people, things, resources, and facilities utilized on your project will need to be accounted for and reassigned to wherever the organization dictates that they be moved and in a timely manner that helps ensure that they are where they need to be when it is most valuable for both this and other projects.

For example, certain tools and technological skills might not be needed for the entire project, so knowing when they

can be released and reassigned to other departments or groups that can make better use of them is a vital part of your project planning.

3. Disposition of team members

Although superficially covered in the section above, it needs to be expanded on because we are now dealing with people and not things. There are several "people" elements involved with projects and how we handle the release of each type is slightly different and worthy of consideration.

(a) Contract or temporary employees

These individuals are the easiest to release because their tenure as temporary workers was established at the time they entered the project's work force. The standard method of releasing these people is to inform them in writing that based on the current status of the project, their services are no longer needed.

Prudence dictates that the human relations, accounting, payroll, and/or personnel department be advised since they will ultimately have some involvement in the termination process. Unless there is some significant reason why an appraisal of the individual's performance is necessary at this time, all judgements about performance or the reason for their termination, other than their current non-necessity to the project, should be deferred until an appropriate time.

(b) Part-time employees

Prior to releasing these individuals, you will need to check with the hiring authority in your organization (human

relations, accounting, payroll, and/or the personnel department) to make sure that you are operating within the legal and operational guidelines of the organization.

As above, the standard method of releasing these people is to inform them in writing that based on the current status of the project, their services are no longer needed. Unless there is some significant reason why an appraisal of the individual's performance is necessary at this time, all judgements about their performance or the reason for their termination, other than their current non-necessity to the project, should be deferred until an appropriate time.

(c) Employees who are drawn from an organizational pool

Many businesses and organizations have pools of talent that are constantly being utilized on a part-time, temporary, or project basis. Once the assignment is complete, the individuals return to the organization pool.

Be sure to follow the organizational guidelines for requesting and returning these individuals to help ensure that their continuity and availability are consistent with the rules, regulations, and guidelines of the business.

As above, the standard method of releasing these people is to inform them in writing that based on the current status of the project, their services are no longer needed. Unless there is some significant reason why an appraisal of the individual's performance is necessary at this time, all judgements about performance or reasons for releasing them from the assignment, other than their current non-necessity to the project, should be deferred until an appropriate time.

(d) Full-time employees

Prior to the release of full-time employees (and probably part-time employees as well), the human relations, accounting, payroll, and/or the personnel department should

be consulted to firmly establish the guidelines and procedures for relinquishing their services.

In certain circumstances, where an individual's performance (or lack thereof) is the underlying reason for eliminating them from the project team, and you feel that an unpleasant or potentially litigious situation might occur, you may even wish to allow someone with a different scope of authority, e.g. the personnel department, to perform the actual function of announcing to an individual that his services are no longer required on your assignment.

Although these measures may initially appear to be a bit extreme, remember that in today's litigious business climate, wrongful termination, discrimination, and harassment claims have become all too commonplace and even the most innocent of statements or procedures, inappropriately introduced during a termination proceeding, can result in legal actions. Consequently, it is in everyone's best interest to err on the side of caution and avoid any unpleasant legal entanglements that might result from an inappropriately conducted removal of an individual from the team.

(e) Staff and/or administrative employees

Many projects do not operate completely autonomously and require the support of other organizational elements such as typing, word processing, drafting, accounting, administrative, facilities personnel, and clerical staff.

If the support is rendered on an organizational basis, that is, where you or a member of your team are granted the latitude of utilizing the support staff on an as-needed basis and your project is charged accordingly, there is no formal phase out required other than to thank the people for their support.

If these individuals have been assigned to you for the duration of the project, their release from the project should

be handled in the same manner as persons who were assigned from the organization's pool of labor.

Be sure to follow the organizational guidelines for requesting and returning these individuals to help ensure that their continuity and availability are consistent with the rules, regulations, and guidelines of the business.

As above, the standard method of releasing these people is to inform them in writing that based on the current status of the project, their services are no longer needed. Unless there is some significant reason why an appraisal of the individual's performance is necessary at this time, all judgements about performance or reasons for releasing them from the assignment, other than their current non-necessity to the project, should be deferred until an appropriate time.

(f) Volunteers

Volunteers come in two varieties – those who are true volunteers and those who are *shanghaied* into helping with the project.

The *shanghaied* volunteers are there because our dealings with them establish them as a valuable asset and we can really use their help with the project. These people are usually treated as friends and are utilized on an "as we can get them" basis.

Since their involvement is usually marginal and short-lived at best, we probably will not need to invoke any form of formal termination other than to thank them profusely for their assistance.

True volunteers are those who have responded to our requests for assistance and can be released from the project with our thanks and the announcement that based on the current status of the project, their services are no longer needed.

Since volunteers, by their very nature, are unpaid and normally have no contractual relationship with you or the

project, appraisals of the individual's performance and all judgements about performance or reasons for releasing them from the assignment, other than their current non-necessity to the project, should be avoided completely. There is no good reason to do so other than in the following situations:

○ A mandate, based on some form of operational decision, such as another individual wanting to use their services who needs to know your opinion based on the work they did for you.

○ A pending legal action that has some significant connection to the work they performed for you on the project under your supervision.

Once again, although the rationale seems to be severe, spreading tales about an individual's performance capabilities might result in unwanted or unwarranted legal action if the individual decides to take offense to the reputation that is being established and can trace the origin back to you and/or the project under your control.

4. Written steps which should be followed for actual turnover to the client

Like everything else connected with a well managed project, having a written plan for turning over the project to your client, whether it is an outside organization or your immediate supervisor, will help ensure the project's overall success.

Certain projects, such as those involving the testing and acceptance by outside groups like quality control or an environmental impact study group, should be planned, budgeted, and scheduled like any other task in the project.

If the client has an acceptance process whereby they indicate what will constitute their satisfaction with what has been delivered (sign off), you must include it in the overall task and guideline schedules.

5. Special implementation or training instructions that the client will need

Many technical-based projects require that an in-depth set of instructions or training procedure to accompany the project in order for it to be fully implemented and more importantly, successfully operated by those who need the system.

Computer hardware and especially software are excellent examples of that old adage that says: *"The job is not over until the paperwork is done."*

Complex operating systems and the inherent complexity of software mandates that a set of complete, comprehensible, understandable, and usable instructions accompany the finished product or it will be less than 100 percent user friendly and probably ineffective for the end user.

If the project's goal has been to develop a product for mass production, this documentation may include all manufacturing and test specifications that will be needed to accurately reproduce and guarantee the compliance of the finished product.

6. A list of project documents to be maintained by the team as well as a list of documents to be given to the client

During the course of the project, documentation covering materials, labor, costs, and test results will be generated by the project team. Once a project is complete, an audit of these documents should be made to determine which of the following categories they fall into:

- O Essential and should be kept with the project archives.
- O Superfluous or non-essential and may be disposed of.

○   Those which must be turned over to the client as a part of the designated "deliverables" of the contract.

7. Clearance of final bills and charges received after the project changes hands

Many projects incur costs and charges during their development and implementation that are not received until after the project has been completed. Regardless of whether the bills, and their payment, is a part of an invoicing system to be paid or reimbursed by the client, or they are simply part of the organization's internal accounting system, all financial matters connected with the project must be accurately recorded and settled for the project to be truly complete.

Because of the delays in submission of final invoices or the delays in payments of invoices, for many projects, the clearance of all accounts by the accounting department marks the true closure of the project.

8. A list of support items such as supplies, tooling, and spares that need to be transferred to the client

During the course of the project's development, certain other things may have been developed or acquired under the umbrella of the contract that are actually the property of the client or end user.

At a time and in a manner that is deemed acceptable to the client, be prepared to turn over any and all property specified by the project's documentation, including:

○   Any and all supplies, such as unused items such as stationery supplies, reference books and materials.
○   Tools and test equipment purchased specifically for the project that have been charged to the client.
○   Any spare parts that were purchased and paid for under the mandate of the project, whether a part of the deliverable items of the contract or not.

For example, plastic toys have injection mold tooling that is big, heavy, and potentially valuable to the client. Specific plans for the disposition of this tooling is critical to both the client and the firm that is using it. Since it is a valuable asset, it must be properly packaged and stored and since it is big and heavy, you might not want to store it at your facility.

9. Schedule, complete, and submit a written End of Project report

Although many projects are inherently concerned with the writing and submission of a "white paper" that summarizes an investigatory effort, many projects that involve physical results sometimes overlook the importance of a written compilation of the events leading up to the success of the effort.

The history of the efforts involved, the interim successes and failures, and the challenges that were faced and how they were overcome are all important parts of the project for a variety of reasons, including:

O Justification for the resources expended.
O Future modifications or ongoing development.
O Accurate records to show others the steps required for success should they choose to embark on a similar project.

Do not forget to include a "Lessons Learnt" section in the report to make sure that any significant events or results are thoroughly documented for future reference.

It is also helpful to conduct a pluses and wishes analysis with the team members and include them in the report. This will give you valuable insight as to what went right, what went wrong, and knowing what they know now, what the members of the team would do differently if they had to do the project again.

For example, after you have planned and implemented the awards dinner that was used as an example in Chapter 9, you might want to create a folder that contains all of the vendors that you used along with some notes, comments, and pricing information so that the next time a similar event occurs, the persons responsible do not have to start from ground zero again.

10. If it is allowed, publicize your project

This gives you, and the people on your team, the visibility you deserve for a job well done. Few people ever understand what projects and their related efforts are really all about with the result being that the people who do all the hard work rarely ever get notoriety for their accomplishments.

Publishing the allowable details about your successful project in newsletters, e-mails, press releases, and trade journal articles is added notoriety for your organization or group and will serve as a vehicle to let others know what you have accomplished and that you are good at doing it.

This is more than just an "ATTA BOY!". This is free publicity for your efforts and especially in the case of projects that are funded, it will increase your visibility as a possible resource for others who might wish to have a similar project undertaken.

11. Give credit to your team and all interested parties

Unless you are a one-person show, your project required the assistance of many people, some of whom were extremely critical to your success but who are never acknowledged or thanked. These include consultants, vendors, and organizational support personnel who did not have a front line exposure to the project.

For example, if your project requires a lot of travel, your travel agent is a key element in the success of the project and is, by all rights, a part of the project team. Your vendors

are another prime example of a critical element but other than getting their invoices paid, they are seldom acknowledged or thanked.

During my days in the toy industry where I was traveling to Hong Kong, Taiwan, Japan, Korea, Singapore, and the Philippines, I was dependant on component manufacturers, travel agents, airlines officials, customs brokers, freight forwarders, trading companies, and a variety of suppliers that were all necessary to complete the projects on time and within budget. I always sent thank-you notes, gifts, and whenever possible, an invitation to a "celebration party" to simply say thank you to all the people who helped make the projects a reality.

It is amazing that to this day, 20 years later, I still stay in touch with many of these vendors and if I need anything, they are always available to help – just because I said thank you and acknowledged their contribution to the overall efforts.

Send a thank-you letter to each team member. This is more than just a note; it is a form of reference for the quality of his or her work and dedication they put into making the project a success.

When I was a program manager in the aerospace industry, I was often assigned several different engineers and technical specialists from the engineering pool. When the individuals had completed their portion of the project, I wrote them a thank-you letter and usually a letter of recommendation about how much their contribution to the project had helped make it a success.

I sent a copy of this letter to the engineering manager and to the human resources department to be included in their files. When it came time for salary reviews, it never

hurts to have a positive reference letter and I found that this simple act of courtesy would get me the best engineers asking to work on my projects.

Finally, celebrate success. This does not have to be a big deal but it does need to be done. It can be as simple as bringing in a cake, a plate of sandwiches or cookies plus some soft drinks, tea, and coffee, and bringing together the team to say thanks and celebrate the success of the project.

Celebration!

When I was working extensively in the Pacific Rim, I was both a honored guest and host many times when we completed both the final tasks involved in large-scale production as well as the solving of interim problems associated with achieving the ultimate goal. Sometimes, we would head for a simple coffee shop on Nathan Road in Hong Kong, a nice restaurant in Singapore, or a noodle shop in Taipei to celebrate.

When I was in the United States, I would make it a lunch at a coffee shop or I would bring in bagels and coffee as a way of saying thanks for "getting the job done".

Too few people who work extra hard to accomplish something important or critical to a project are ever thanked for their efforts – it was simply taken for granted that they would do their best for their wages and nothing more. Celebrating success and saying thank you is a small price to pay for the loyalty and support of those whom we come to depend on to get things done on time and within budget.

The important thing to remember is that when you celebrate your victories together, it gives you "history" and if you ever need to use these people again, they will remember your successful projects and that will give you a foundation to start the way to another successful project together.

HANDLING MULTIPLE PROJECTS
AND PRIORITIES

*One of the toughest parts of effective project management is
handling multiple projects, priorities, and deadlines.*

Managing multiple projects can seem
to be like juggling eggs in front of a crowd
of people–sometimes you wonder if you
are going to catch everything! It is not
uncommon to have difficulty maintaining
the progress of multiple projects without
focusing on one project while the others fall by the wayside.

The dilemma comes from the fact that these days, not
only are project managers expected to manage multiple
concurrent projects, but often need to juggle resources
including facilities, people, and equipment including
"people" resources that often report to another manager who
determines their schedule.

The reality of our lives is that the projects that we manage
are seldom simple, not well understood, not clearly
documented, and are often more complex than they seem.

From the project manager's perspective, being tasked
with multiple projects to manage usually requires some type
of answer to the following questions:

O Who am I working for?
O Who controls my time?
O Which project is more important?
O If I get behind, what should I let slip and be delayed?
O Is anyone besides me looking at or do they even care about the big picture?

In order to handle multiple projects simultaneously, a priority list must be developed, documented, reviewed, and updated on a regular basis to ensure that what is most important is getting the proper attention it deserves.

This is not quite as difficult as it sounds if you remember that a priority list is basically a "things to do" list with a chronological priority list attached. Once you have all the information recorded, you can establish a "blended" list of tasks and priorities from multiple projects.

As with single projects, when considering the priority of events, you MUST look at several different aspects and give them a priority value. You need to determine which projects are more important than the others. When faced with multiple projects, it is important to decide what to do and in which order it gets done. It is no use simply selecting a project you like and paying attention to that project alone. Careful analysis is needed to ensure that each project meets your organization's strategic objectives and that you are aware of target dates.

Establishing The Priority

PRIORITY #1:

Remember: The ones with the highest priorities ALWAYS goes to the top of the list.

Here's how to establish the priority:

1. First, consider the immediacy of the task.

O Does it have to be handled now?

○ Why does it have to be handled now?
○ Is it because someone says so or because it REALLY is critical that it be done now?
○ What will happen if we wait until later?

In other words, can it be put off until later with no major consequences to the project?

2. Next, consider cause and effect.

○ Does the task stand alone or are other tasks affected by its completion?
○ Does the task seriously impact one or more other tasks if it not handled immediately?
○ Is there a budgetary advantage or disadvantage to performing the task now?

3. The next step is a decision matrix with four levels of priority.

Once you have decided the priority level, put the tasks on a numbered chart and attack them from the top to the bottom.

Here is how the matrix looks and how the priorities are developed from it and the other considerations.

	You	Them
Now	#1	#2
Later	#3	#4

(a) Priority #1: You/Now

A project task placed in this quadrant requires your personal attention and must be done now because:

○ Cause and effect dictate it – delays now create bigger problems later.
○ It is financially expedient to do it now.
○ There is no choice – it is now or never.
○ The schedule said it is the right time.

(b) Priority #2: Them/Now

A project task placed in this quadrant is one that is delegated to someone else and must be done now because:

○ Cause and effect dictate it – delays now create bigger problems later.
○ It is financially expedient to do it now.
○ There is no choice – it is now or never.
○ The schedule said it is the right time.

(c) Priority #3: You/Later

A project task placed in this quadrant is one that is delegated to someone else and can be done later because:

○ It is not time sensitive other than it is a part of the project.
○ The materials and/or personnel to perform the task are not available.
○ You are earlier with the task than was planned, scheduled, or needed so its performance at this time is optional.
○ It is financially expedient to wait until a later time to perform the task.

(d) Priority #4: Them/Later

A project task placed in this final quadrant is one that is delegated to someone else and can be done later because:

- It is not time sensitive other than it is a part of the project.
- The materials and/or personnel to perform the task are not available.
- You are earlier with the task than was planned, scheduled, or needed, so its performance at this time is optional.
- It is financially expedient to wait until a later time to perform the task.

4. The last step is to put the tasks together on a prioritized list.

Priority List

Priority	Task Description	Who is Responsible	Deadline
#1			
#1			
#2			
#2			
#3			
#3			
#4			
#4			

Do not be deceived by the relative simplicity of the quadrant – managing multiple projects can be disastrous if not handled properly!

Techniques For Delegating Project Responsibilities

Why delegate?

Delegation is the act of empowering to act for another and the empowered individual is known as the delegate. From

the perspective of a project manager, it means managing and coaching people who have the best skills and motivation to complete the specific task at hand.

By definition, your job as project manager is to de-centralize and delegate the tasks involved in completing the project rather than incorporating them all under your control. By delegating or de-centralizing, a significant amount of authority is assigned to lower levels.

At a certain point, it is just not possible to still be that one person in control of everything. Bringing in others to help you with your projects is an absolute necessity for the successful completion of your projects.

Effective project management is finding the right persons and giving them the right work. The sheer volumes of project management usually necessitates delegation and dictates that you drop unnecessary work altogether and concentrate your specific talents only on the tasks that nobody else can do. Necessary tasks that can be done by others should be delegated.

This does not mean that you completely write yourself out of the project but as a project manager, you should concentrate on the activities that bring the most value to projects. You will be much more valuable if you perform only "essential activities" that relate to your projects. To be more effective, simply learn to do less and manage more.

To help you define and allot tasks, including your own, ask yourself three of Peter Drucker's questions:

- O What am I doing that does not need to be done at all?
- O What am I doing that can be done by somebody else?
- O What am I doing that only I can do?

The secret of successful delegation

Do not micro-manage! Explain the task, tell your people what should be done, but do not tell them how. This is the secret

of successful delegation and the heart of **Common Sense Project Management™.**

When you tell somebody exactly how you want a task carried out, it removes any creativity. It may be productive but it becomes boring, frustrating to their creativity, and they do not develop in any capacity whatsoever.

There are no hard and fast rules about what to do yourself and what should be delegated – those decisions are a significant part of your job as project manager. However, there are some advantages and disadvantages to doing things yourself that might help you make the decision more easily when the time comes to decide.

Advantages of doing it yourself

○ Close control of operations.
○ Uniformity of policies, practices, and procedures.
○ Better use of centralized experts and resources.

Advantages of Delegating

○ Faster decision-making.
○ Decisions better adapted to local conditions.
○ Direct experience for the task managers.

If you assume that people who work for you have the ability to handle the tasks involved in the project, be specific about what is expected and tell the person:

○ What should be done.
○ Why it is needed.
○ When it should be completed.
○ What should be done, but do not tell them how to do it.

Delegation DOs

- O Chose delegates based on a fair and objective assessment of their skills and abilities in relation to the requirements of the task.
- O Give precise instructions; use simple procedures; show team members how to do something and explain why it is done that way.
- O Show how each delegation contributes to organizational goals.
- O Clarify expected results.
- O Develop standards of performance; recognize superior performance.
- O Discuss problems; answer questions; solicit team member's ideas about how to do the job.
- O Be supportive; exhibit trust; keep your promises.
- O Praise positive achievements in public.

Delegation DON'Ts

- O Don't delegate in a haphazard fashion.
- O Don't over-exercise your power; don't micro-manage the tasks.
- O Don't criticize team members in front of others.
- O Don't overreact to problems or mistakes.
- O Don't over-control the performance.

Here is an important consideration: Promoting from within your organization is a valuable tool for retaining and motivating your people. However, if the current pool of employees does not have the skills your project needs, do not hesitate to hire someone who does!

It often makes sense to search for someone who can immediately add value to your project team as well as transfer some of their skills to others in your organization. If you assigned a task to someone and the job is not getting done, there are two likely reasons.

- You have delegated the task to someone who is unwilling – or unable – to complete the job, and have not monitored this person's progress.
- You may have been micro-managing a capable person who was quite able to complete the assignment with little assistance from you and you ended up "choking" the person.

Whether you are managing, leading, or coaching, it is crucial to match your style of interaction with the trainee's skill, will, and readiness for the task. Their skill depends on experience, training, understanding and role perception, and their will depends on the desire to achieve, incentives, security, and confidence.

To help you avoid problems, we have listed four of the most common mistakes managers make when they are trying to coordinate activities on multiple projects.

1. Setting unrealistic deadlines

We have all committed to getting something done by a certain date without knowing how we are going to get it done. When you make these kinds of commitments on multiple projects, you are likely to get caught in a cycle of "putting out fires" and ignoring the needs of some projects until they reach a crisis point.

2. Relying on your strongest team members to do the bulk of the work

It is natural to assign important tasks to the team members you trust most. However, one person cannot juggle ten objects for long. If one or two team members are trusted with the majority of your projects, you risk burning those team members out while failing to take advantage of the contributions that other team members can make.

3. Not accurately estimating how many hours each phase of your projects will take and staffing accordingly

Without carefully thinking through the length of time your teams will need to spend completing a project, you may find yourself overstaffed at some points in the project and understaffed at others.

4. Not prioritizing

It is easy to be overwhelmed by keeping up with the day-to-day phone calls, meetings, and urgencies on your projects and neglect planning and getting started on important, but less pressing, aspects of your projects.

Tips for juggling multiple projects

Now that we have warned you about what to watch out for, here are some tips that will help you juggle multiple projects effectively.

- ○ **Use your computer to create spreadsheets and GANTT charts** – Use them for tracking hours, budgets, and progress on each project.
- ○ **Staff appropriately and balance workloads** – Once you have projected how many hours it will take to complete each phase of each project, decide how many people you will need on each project and identify points in the project when you will need to increase or decrease staffing to maintain balanced workloads.
- ○ **Review the status of each project frequently** – Even if you are involved with an urgent matter on one project, checking the status of each project every day will help you to avoid future crisis points.
- ○ **Find lasting solutions** – If you focus on creating lasting solutions to problems rather than on coming up with temporary fixes just to get through a crunch

on a project, you will find that projects go more smoothly and crises occur less frequently.

○ **Set interim milestones** – Do not wait until the week of a deadline to learn about problems that often hold up the successful completion of the project. Setting interim deadlines will help you pace the project and anticipate problems before they become unmanageable.

○ **Write status reports and hold status meetings** – Set weekly or monthly goals and track your progress in attaining your goals.

"To Do" Lists

After you have outlined your projects, prioritized them, placed them on the matrix, and you will have a list of tasks to accomplish. This is commonly called a "Things To Do" list, which, by its very name, is a list of all the tasks that you need to carry out.

Its power is in its ability to consolidate all the jobs that you have to do into one place. You can then prioritize these tasks in order of importance. This allows you to tackle the most important ones first.

"To Do" lists are essential when you need to carry out a number of different tasks or different sorts of task, or when you have made a number of commitments. If you find that you are often late with a task or because you have forgotten to do something, then you need to keep a "To Do" list. It helps you to remember all the essential tasks that needs to be done in the right order.

Preparing a "To Do" List

The solution is often simple.

○ Write down the tasks that face you, and if they are large, break them down into their component elements. If these still seem large, break them down

again. Do this until you have listed everything that you have to do.

O Once you have done this, run through these jobs allocating priorities from A (very important) to F (unimportant).

O If too many tasks have a high priority, run through the list again and demote the less important ones. Once you have done this, rewrite the list in priority order.

When you are finished, you will then have a precise plan that you can use to eliminate the problems you face and tackle them in order of importance. "To Do" lists allow you to separate the important tasks from the many time-consuming trivial ones.

Using your "To Do" lists

Different people use "To Do" lists in different ways in different situations: if you are in a sales-type role, a good way of motivating yourself is to keep your list relatively short and aim to complete it every day.

In an operational role, or if tasks are large or dependant on too many other people, then it may be better to keep one list and "chip away" at it. It may be that you carry unimportant jobs from one "To Do" list to the next.

You may find yourself not able to complete some very low priority jobs for several months. Only worry about this if you need to – if you are running up against a deadline for them, raise their priority.

The key thing to remember about using a "To Do" list is that they will help you to:

O Remember to carry out all necessary tasks.

O Handle the most important jobs first, and not waste time on trivial tasks.

O Keep from getting stressed by a large number of unimportant jobs.

Deciding Your Work Priorities

Remember the old adage: "If you want something done rapidly and efficiently, give it to the person who is the busiest"? The logic is that busy people do not procrastinate or find excuses why it cannot be done – they simply forge ahead and get it done.

On the other hand, you probably know several people who spend their time telling you how busy they are and as a result, they never seem to accomplish anything. (That is because they spend their day talking about it and never get around to doing anything.)

If this concerns you and you are worried about becoming "one of them", we have some guidelines for prioritizing your workload and getting more done with less effort.

An important part of focusing on the results of your projects is working out what to focus on! Many people work very hard all day doing little jobs that do not actually affect the outcome of their designated projects. To effectively prioritize your time, you need understanding in three areas:

- ○ Clarifying what it is that you enjoy doing.
- ○ Identifying your strengths and weaknesses.
- ○ Defining what your responsibilities truly are.

Doing what you enjoy

An old proverb says: "If you want to see someone doing something well, watch them when they are doing something they like to do." Some people thrive on the chaotic circumstances that accompany the managing of multiple projects while others seem to be completely miserable in the same situation.

The answer seems to lie in the simple fact that it is important for your own quality of life that you enjoy your work. If you know that you enjoy juggling a lot of things at once, then you will probably do well at managing a lot of things at once. On the other hand, if doing more than one

thing at once is something that drives you crazy, you should probably seek assistance immediately.

Of equal or greater importance is your ability to effectively handle the tasks that are assigned to you. If what you have taken on is far beyond your capability to perform effectively and efficiently, you will create nothing but stress and grief in your life and the overall progress of the project will be jeopardized and possibly fail.

If you use the SWOT process described earlier in this book, you should be able to accurately determine whether or not you are in over your head.

If the concept of handling multiple projects seems overwhelming to you, stop for a moment and remember that for most of your life, you have been in charge of several things at once – you simply did not worry about it.

For example:

O How many different subjects were you responsible for learning and passing in school?

O How many different birthdays, anniversaries, or other important dates have you planned in advance?

See, you have already had experience in handling multiple projects. Now take that experience and go manage a whole bunch of new ones successfully.

MANAGING THE TIME IT TAKES TO MANAGE A PROJECT

The physical reality of the universe tells us that all projects are going to take time, our time, to manage them properly. The concept of effective project management is to manage the time it takes to manage projects so that we do not waste our time doing things that do not need to be done or in a time inefficient manner.

In recent years, time management has become one of the top ten topics for seminars, workshops and "things we have got to learn to do" lists for individuals, corporations, and organizations. And, although the concept is admirable and the training is informative, we still cannot manage time because time does its own thing regardless of what we do.

What we can do, however, is to plan and manage what we, and our project team, do with our time to help ensure that we use it to our best advantage and do not waste any more of it than is absolutely necessary.

This being said, the first step is to dispel the most common myths of time management that have become the sales pitch for the topic. Once that is done, we can examine what will work for us in our quest for successful project completion that is performed on time and within budget.

Myths Surrounding Time Management

Myth #1

Time management is getting more done in less time. This may be the result of time management but it is not the essence of time management. The essence of the time management philosophy is defining the important tasks in our lives and doing these with the time we have.

Myth #2

"To Do" lists help get things done. "To Do" lists, as described elsewhere in this book, are intentions and reminders. Some people operate very efficiently and effectively when their lives and tasks are defined on a list while they intimidate others. In fact, for many people, they do absolutely nothing other than make us feel guilty.

Myth #3

People need a personal organizer to get organized. People are not organized simply because they use an organizer system. A former business partner of mine spent thousands of dollars on organizer systems from simple weekly reminder booklets through laptop computers and Personal Information Manager (PIM) software. Today, he is no more organized than he was when he wrote himself notes on slips of paper and his desktop calendar. You will achieve personal organization by breaking old habits that do not work and forming new ones that work for you.

Myth #4

"Quiet time" is a great time project management tool. I used to love my trips back and forth from Los Angeles to Taipei because as soon as the door was closed on the aircraft, I was isolated from the outside interruptions and distractions of the business itself and felt that I could concentrate solely

on a project that had to be done. Unfortunately, I was interrupted by everything from the opening safety announcement to duty free sales on board the aircraft to kids running up and down the aisles.

"Quiet time" is a figment of our imagination. We can reduce interruptions but we cannot eliminate them entirely. If we sequester or isolate ourselves, we might get unbroken time to complete a time sensitive project but the situations that occur during that period will simply wait for us to emerge from hibernation.

Myth #5

Keeping a time log to determine where your time is going is a place to start. Maybe, but it is something that you really have to do after your day is over. What it is really good for is to look at where you are spending your time and how effective it was in getting the things you need to do accomplished.

The form shown on page 132 will help you to look at what you have defined as your major tasks and where you are actually spending your time. If the bulk of your time is not being spent where you have set your priorities you will know what to change to get more of your important tasks accomplished in the time you have available. If your time is spent on projects and tasks that are not related to what you have defined as your major efforts, the chart will show you where you are focusing your efforts.

Daily Time Log

"Stop majoring in minor things."

Whatever your job responsibility entails defines those tasks that are major events in your workday. Anything else is a minor event because it detracts from the primary function that you are supposed to be focusing on. The simple solution

to having more efficiency in your primary endeavor is to reduce the number of tasks in any given time period that do not directly pertain to the major event and replace them with tasks that are focused and concerned with the major event.

As you keep the log, make note of who decided that you should be doing the task. This will help you figure out who's controlling your life – you or someone else.

Time	Task Description	Your Task	Someone Else's Task	Daily Required Task
8:00–8:30				
8:31–9:00				
9:01–9:30				
9:31–10:00				
10:01–10:30				
10:31–11:00				
11:01–11:30				
11:31–12:00				
12:01–12:30				
12:31–1:00				
1:01–1:30				
1:31–1:00				
2:01–2:30				
2:31–2:00				
3:01–3:30				
3:31–3:00				
4:01–4:30				
4:31–5:00				

Myth #6

The biggest time wasters include telephone interruptions, visitors, meetings and rush jobs. Although they might interfere with our wanting to get something done in the shortest amount of time, these are not time wasters; they are obligations that are a part of our daily lives.

The biggest time wasters are usually self-imposed attitudes and habits such as procrastination, making mental notes and forgetting what they were about, interrupting ourselves with tasks that are not focused on our objectives, searching for things, re-doing things over and over to achieve some form of personal perfectionism, and spending time on trivial tasks.

Myth #7

It is more efficient to stick to one task until it is done. First of all, we need to look at the difference between the words. Efficient is being productive without waste and effective is producing a decided, decisive, or desired result.

Sticking to a single task might be more efficient but not necessarily more effective because some of the tasks may not get done. Working on priorities is usually best accomplished in brief sprints, not in marathons.

Myth #8

Time is money. Time is more than money; it is life itself. It is possible to win the lottery tomorrow and have more money than you will ever need, but there are no lotteries anywhere that will get you more time. Remember that you can always get more money but you cannot get more time. Effective time management will go a long way towards creating the illusion that you actually have more time.

Time Management Issues

Time management issues have been examined and discussed for a long time. Here are the major elements that will probably cause you the most trouble.

1. Shifting priorities and crisis management

Management guru Peter Drucker says that "crisis management is actually the form of management preferred by most managers". The irony is that actions taken prior to the crisis could have prevented the fire in the first place.

2. The telephone

Have you ever had one of those days when you thought your true calling was in telemarketing? The telephone – our greatest communication tool – can be our biggest enemy to effectiveness if you do not know how to control its hold over you, especially now that we have cell phones and do not get away from the phone but simply take it with us.

3. Lack of priorities and objectives

This is probably the biggest time waster of all. It affects all we do both professionally and personally. Those who accomplish the most in a day know exactly what they want to accomplish. Unfortunately, too many of us think that goals and objectives are yearly things and not daily considerations. This results in too much time spent on the minor things and not on the things that are important to our work and lives.

4. Attempting too much

Many people today feel that they have to accomplish everything yesterday and do not give themselves enough time to do things properly. This leads only to half finished projects and no feeling of achievement.

5. Drop in visitors

The five deadliest words that rob your time are "Have you got a minute?". Everyone is the culprit–colleagues, the boss, and your peers. Knowing how to deal with interruptions is one of the best skills you can learn.

6. Ineffective delegation

Good delegation is considered a key skill in both managers and leaders. The best managers have an ability to delegate work to staff and ensure it is done correctly. This is probably the best way of building a team's moral and reducing your workload at the same time. The general rule is this: if one of your staff can do it 80 percent as well as you can, then delegate it.

7. The cluttered desk

Right now, look at your desk. If you can see less than 80 percent of it, then you are probably suffering from 'desk stress'. The most effective people work from clear desks.

8. Procrastination

The biggest thief of time is not decision making but decision avoidance. By reducing the amount of procrastinating you do, you can substantially increase the amount of active time available to you.

9. The inability to say "no!"

The general rule is: if people can dump their work or problems onto your shoulders, they will do it. Some of the most stressed people around lack the skill to "just say no" for fear of upsetting people.

10. Meetings

Studies have shown that the average project manager spends about 17 hours a week in meetings, about 6 hours in planning, and untold hours in the follow up. It is widely acknowledged that about as much as a third of the time spent in meetings is wasted due to poor meeting management and lack of planning. Chapter 14 of this book will help you solve this problem fast!

Developing Time Policies

The concept of time management is a critical factor in effective project management because effective project management is the management of people's time and the resources required to successfully complete the project.

As the project manager, being able to manage our own time reflects directly on the time frames involved in the success of the projects because all projects have deadlines and cost consequences associated with late delivery of critical elements. Mastering any of the critical components to effective time management will improve your skills and overall productivity and the more you master, the better you will get.

Component #1 – Develop a personal time policy

Time management is managing our time effectively or rather, what we do with it with respect to the goals we have set out for ourselves.

Your day is filled with activities, and not all of them relate to specific projects. Some of your time has to be spent in managerial duties, telephone time, writing reports and other correspondence, meetings, and other essential parts of your job. Developing a set of time guidelines will help you to schedule your time and make more efficient use of it.

Notice the emphasis on the word guidelines. This is not supposed to be cast in concrete – it is a guide to help you

get through your day more efficiently and effectively. It is a piece of paper – not an army of prosecutors ready to crucify you for not keeping to the schedule.

Component #2 – Planning

There is an old philosophy that says, "People don't plan to fail – they simply fail to plan." That is actually pretty sound advice because without a plan, we really do not know where we are at, what we have accomplished, or how much we have left to do.

Planning a project and monitoring its progress will help us to understand not only what is happening now, but also what has happened during the project and what is likely to happen to future projects if we do them in the same manner.

Component #3 – Looking at what you do and why

If it really does not matter what we do with our time, we can probably justify everything we do in some form or another. Unfortunately, that justification does not change what we have done or did not get done.

What matters is looking at what we do, why we really do it, and deciding whether it is doing us the most good based on what we say we want to accomplish.

Component #4 – Getting organized

Trying to get organized all at once is like trying to eat a 50-pound turkey in one sitting – it is just not practical. Organizational skills are learned through practice and sometimes, they are a natural talent. Either way, Nancy Miller, the *Clutterology®* and organization expert, tells us that there is a four-step process that will make it easier to swallow the task than trying to do it all at once:

○ Reduce it,
○ Make it neat,

○ Clean it, and then

○ Organize it.

For example, if you have get an office full of books and they are interfering with your ability to manage properly, here is how to go about getting the entire mess organized:

1. **Reduce it** – Empty out your bookshelves, boxes and piles of books into a central location (like the floor). Then, look at the books and toss out those that you do not use, have never been used, that can be borrowed from a library or somebody else, or whose copyright is more than ten years old.

2. **Make it neat** – Put the books into neat stacks that you can handle without getting upset about the total number of books you have to organize. The simple fact that they are now in neat stacks makes the project seem more manageable.

3. **Clean it** – Clean the bookshelves or area where the books will eventually go. Getting rid of the dust that always builds up in and around anything that has been stored and not moved for a length of time will help to get our minds and bodies moving in the direction of completing the project.

4. **Organize it** – Now is the time to actually organize the books. The technique you choose (size, topic, date of publication, etc.) will be your choice and determined by how you think they will be most accessible and useful.

Component #5 – Delegation of responsibility and authority

You are probably not planning on doing everything on the project yourself, so start out at the onset by dividing up and delegating the tasks, responsibilities, and authority.

Your job as project manager is primarily to manage the project and not to do the tasks yourself. There may be certain

elements of the project where you will write yourself in as the primary person because it is in the best overall interests of the project to do so, but the objectives are still the same – get it done on time and within budget.

Component #6 – Training

*"If you think the cost of education is high,
imagine the cost of ignorance."*

There was a time in business where a person had to serve an apprenticeship and pass tests to become a master. Then, and only then, were they entrusted with positions of responsibility.

In today's fast-paced and budget controlled world, training for a job is usually overlooked or dismissed as unnecessary, usually, with disastrous results. In a world that is reinventing itself technologically every one to four years, training and retraining people is no longer an option. Technology and the jobs that depend on it require a level of proficiency and training is the only way to ensure that level.

There is an old adage that goes: "There is never enough time to do it right but always enough time to do it over again."

Without proper training, we can be assured that we will lose whatever time efficiency we could have gained with new technology and processes and replace it with time wasting and expensive redundancy. If the success of your project requires the learning of new or updated skills, be sure to include training for the appropriate personnel in both your scheduling and budgeting.

For example, if you are going to purchase a software program to schedule and manage your projects, it will be far cheaper and much more efficient to hire an experienced trainer to teach the people who must use the software the actual operation of the program rather than depending on them reading the manual or figuring it out for themselves.

Component #7 – Handling reports and paperwork

"There is 80 times more paper in circulation today than when the concept of the paperless office was introduced."

There was a time when most of the people in the work force generated handwritten documents and the secretaries typed up the important paperwork and copied it for distribution. With the introduction of personal computers and high speed printers at everyone's work station, it is now possible for any given individual to generate dozens or perhaps hundreds of pages of paperwork each day, all of which seems to be important to somebody.

For example, I just checked the page counter on my laser printer that I purchased two years ago. The latest count was 67,852 copies and I am not considered a high volume user of the printer. This is my third laser printer in 15 years and if each one lasts for 200,000 sheets of paper, that is well over half a million pieces of paper that I will have printed.

Who would have ever thought that they would generate half a million pieces of paper during their business career? Not me – how about you?

This reality of this example is that excess paper has become our standard of doing business, so establishing and using an efficient method of handling the mounds of paperwork that occur in our day is critical to the success of our time management, project management, and business success.

Component #8 – Communications

"The responsibility for the understanding of communications is on the part of the transmitter, NOT the receiver."

More time, money, grief, and aggravation are expended because of ineffective communication than for any other reason. Communication styles and methods vary widely. As an effective project manager, it is your responsibility to determine which combination of methods works best and apply them.

For example, if you find that your team requires that things be in writing to get it right, then put everything in writing, even if you hate to write. On the other hand, if you find that the team works better as a result of being assigned tasks and then having them explained in a face to face meeting, that is the best method to use.

The important thing is to get all the messages involved in the successful completion of the project to the right people in a manner that they can understand and apply without errors caused by misunderstanding the communications.

Component #9 – Handling interruptions

"We teach people how to treat us."

Unless you are living on a desert isle by yourself, you will have interruptions in your day. How you handle those interruptions can make a world of difference in your time management and ultimately, the management of your projects.

There is no need to be angered by interruptions but it is important to let other people know what are real priorities for you and what are not. Do not make people guess wrong about what works for you and what does not. Tell them or better yet, put your definitions in writing and make it a firm policy so that you stay in control of what you do and what is allowed to interrupt your cycle of productivity.

Component #10 – Time evaluation

"I am so busy being busy that I do not have time to do my work."

If you were to try and remember what you did during your hectic work schedule, you would probably never get it right.

Keeping a written log of what we use our time for will go a long way towards understanding why we do not seem to have enough of it.

Spending the bulk of our time monitoring our daily tasks will fill our workday but may not accomplish the big tasks that are critical to our success. However, a practical system for monitoring and prioritizing tasks will help to keep projects and our overall lives in balance.

Although these are not the only things that you can do to optimize your time, they will be a great place to start and based on experience, they will provide you with a series of solid ways to get better at time management – fast. The priority matrix on the next page has been referenced by everyone from Steven Covey and Tom Peters to Ken Blanchard and Mike Rounds, so it is probably a good instrument for you to look at too.

Priority Matrix

IMPORTANT	URGENT	NOT URGENT
	I	**II**
	• Crises • Pressing problems • Deadline-driven projects, including meetings and preparations	• Preparation • Prevention • Values clarification • Planning • Relationship building • True recreation • Empowerment
NOT IMPORTANT	**III**	**IV**
	• Interruptions, some phone calls • Some mail, some reports • Some meetings • Many proximate, pressing matters • Many popular activities	• Trivia, busy work • Some phone calls • Time wasters • "Escape" activities • Irrelevant mail • Excessive TV

EFFECTIVE MEETINGS

"No man is an island."

Few, if any of us, are going to be working on a project by ourselves. As soon as we bring in one or more associates, we need to have meetings.

A meeting is formally defined as "a gathering of two or more people sharing common objectives for the purpose of exchanging information or making a decision." For purposes of project management, we are concerned about meetings that allow us to do the following:

○ Gather and disseminate information.
○ Collect opinions.
○ Report on progress or events.
○ Make a decision based on group consensus.

Meetings have become notorious as the biggest time wasters in our day because they tend to be a patronization of the person who is in charge and not really designed to get things done in an effective manner.

Industry Week estimated several years ago that poorly led meetings cost US businesses over 37 billion dollars annually. The current number is undoubtedly higher and internationally, that number is probably ten times higher

A meeting is effective when it reaches its objectives in a minimum amount of time, to the satisfaction of the participants.

because no matter who we are or what we do, we are required to attend meetings.

Nevertheless, we all have to attend meetings. Some of them, we are responsible for calling and some are ones that someone else calls. Once you get your meeting schedule under control you will find that your project goes much smoother and face fewer delays.

Why Have Meetings?

Regardless of who calls the meeting, there are only four reasons to hold a meeting:

1. *To coordinate or exchange information*

Since project members are usually operating independently on assigned tasks connected with the final project result in mind, it becomes a scheduling imperative that the team members get together on a regular basis and share their progress.

2. *To motivate a team*

Project teams are no different from sports team or other groups that are working intensely towards a common goal in that they "run out of steam" and must be periodically "pumped up" to keep their performance standards high and

their work output consistent. Many meetings are held solely to build organizational membership and morale and to help bring about the group's vision and goals.

3. To discuss problems on a regular basis (as in a staff meeting)

This is the best and, possibly the only legitimate, reason to hold a project meeting. As discussed earlier in this book, getting the team together to expose and address problems and situations that need help and support is one of the key factors in getting projects accomplished on time and within budget. These include sharing important and timely information, dividing the group's workload, and finding solutions to problems.

4. To make a decision (a questionable motive)

Unless there is a need to take a vote (as in an official meeting to set policy), decision-making meetings are a questionable motive to assemble the team. Experience shows us that an individual makes most project decisions or the team of individuals assigned to a particular task decides on what course of action should be taken.

Myth Surrounding Meetings

There are three classic "myths" that surround meetings. If you are going to conduct effective project meetings, you need to be aware of them.

○ **Executives belong in meetings** – This may be true but is usually not. The chairing and participation of a meeting should be determined by what you want to accomplish, not by someone's ranking on the table of organization. If an executive can effectively contribute something to the meeting, fine. Otherwise, it is a waste of their time and their presence may

actually stifle the creative process of the meeting because "the boss is there".

O **Meeting records are unnecessary** – The Chinese invented writing because "The shortest note is better than the longest memory." Meetings are called to address specific concerns and disseminate information to team members. Having everything that is important in writing establishes consistency for the team – an element that is essential to its success.

O **Meetings need to last a long time** – Meetings, especially project meetings, should be as long as they need to be to deliver reports and address areas of concern to the participants and no longer. If a meeting is pre-scheduled for a period of time and the meeting does not take that much time, dismiss the participants early so they can get back to the project tasks.

Types of Meeting

Most of the project meetings we will be involved with end up being either information or decision-making meetings. Sometimes meetings are occasionally a combination of the two and the following describes the primary differences between them.

Information meetings

O Give or receive information about ideas or matters concerning the project.

O Includes those who need to know or who have something to contribute.

O Are usually one way from chair to participants with opportunity for questions.

O Have a heavy emphasis on content.

O Need planning and preparation of material to be presented to be effective.

Decision-making meetings

○ Are for reaching a conclusion and course of action on any matter concerning the project.
○ Are generally smaller in size, such as committees or project task groups.
○ Usually comprise persons who have an interest and can contribute to the process.
○ Are interactive and involve participation with a heavy emphasis on problem solving.
○ Support free and open discussion.

What a meeting is not

No matter the reason you conduct or attend a project meeting, remember that a meeting is not about the following.

(a) Patronization of an individual

There is an old adage that says: "The boss is not always right but he is always the boss." If you read between the lines it means that every team member's opinion, no matter how informed, can be usurped or overturned by the person in charge. If this standard of performance is in place, your meeting will automatically be a waste of time because the boss could have made the decision without wasting the rest of the team's time.

Many firms who sub-contract subjugate their expertise to the client and defer to their judgement because they are signing the checks. This attitude usually ends up as a disaster because the clients usually do not have the expertise to make informed decisions and are operating out of emotion.

(b) Used as an excuse for not accomplishing something, a public chastisement forum or a place to lay blame

Things happen, both good and bad, during the course of a project. Using a project meeting to publicly embarrass

somebody because something is not going as planned will undermine the entire project.

Who's who?

Effective project meetings have several different task assignments and the list of who attends the meeting should be determined by what you want to accomplish. A single individual can wear several or all of these task "hats" but each responsibility is critical to the success of the meeting.

- ○ **The convener** is the person who decides the reason for the meeting, calls the meeting, needs the results of the meeting, and who is ultimately responsible for what happens during the meeting.
- ○ **The recorder** is the person who keeps accurate notes and records of what was discussed, who discussed it, what actions need to be taken as a result of the discussion, the persons responsible for assigned actions along with times, dates, deadlines, and budgets involved, ultimately responsible for the accuracy of the meeting's records, and responsible for the timely distribution of accurate records of the meeting to those parties who have a need for these records.
- ○ **The gatekeeper** is the person whose responsibility it is to see that ALL of the parties who need to be invited to the meeting (or a part of it) really are and that those persons who do NOT need to be at the meeting (or a specific part of it) are excluded when the timing is appropriate.
- ○ **A facilitator** helps a group of people find their best agreement, result, or solution, helps you plan a meeting that produces the results you want, helps you prepare minutes, will run your meeting (which frees you to participate and leaves you above such details), knows how to keep people focused on the

issues, keeps order, and helps you reach agreements that everyone will support.

The facilitator may well be the most important person in your meeting because this individual remains neutral, focuses group energy, keeps the group on task, directs processes and encourages participation.

O **Experts** are those persons who have information or reports that are highly specific and whose presence are required for efficiency, accuracy, and credibility. They are essential for specific portions of a meeting but are not necessarily required to be present for the entire meeting.

Tips For Conducting Effective Project Meetings

O Send a formal meeting notice. This is to inform the attendees where, when, and how long the meeting will be. Tell them what you expect of them at the meeting, especially if they are directly responsible for one or more of the agenda items.

O Ask the invitees to CONFIRM that they will be in attendance.

O Send each attendee an agenda. Remember that an agenda is a list of items to be conducted at a meeting and unless it is an official meeting with a mandated criterion that MUST be accomplished in the order defined, the agenda is a guideline – it is NOT a life or death plan!

O List the primary ground rules for the meeting, including the standing rules regarding meeting interrupters such as cell phones, pagers, recording devices, emergencies and breaks.

O Consider where and when the meeting is to be held – sometimes informal meetings held in a coffee shop or restaurant that is "off-site" will garner more

participation than a formal meeting held in a board room. Look to the comfort level of the participants to extract the utmost cooperation.

Here's a list of questions to ask yourself before you decide to hold a meeting.

○ **Do you really need a meeting?** Are you calling a meeting because this is "the way we have always done it" or could you do this with e-mail, a phone call, or a memo?

○ **Have you prepared an agenda?** Each meeting is unique and having an agenda of specific items to be addressed will add to the efficiency of the meeting plus it will tell us when it is over.

○ **Have you invited the right people to the meeting and are they available?** If the people you need to make the meeting effective are not available, seriously consider canceling the meeting or re-scheduling it.

○ **Are you planning on sticking to a schedule and will you dismiss participants if they are not needed?** If not, you are planning for a time wasting session that might be better spent in actually working on the project itself.

Meeting Agenda

Name of Group:	
Objective of Meeting:	
Meeting Date	
Starting Time:	
Ending Time:	
Meeting Called by:	

In Attendance:

Time	Agenda Item	Person Responsible	Time Allocated

DEALING WITH DIFFICULT PEOPLE

Projects have two distinct kinds of problem:

○ Thing and events problems.
○ People problems.

Of the two, the people problems usually give us the most grief because we tend to take the situations and the people involved personally. Just because you are the project manager and the person who is ultimately responsible for the success of the project, does not automatically mean that everybody involved with your project is going to "play nicely" with you and agree with everything you say and do.

Theoretically, we would like everybody on our project team to think and act alike in perfect harmony and if everybody did, there would never be any difficulties between people. Difficulties arise only among people who see the world and tackle problems differently. Many people, therefore, try to surround themselves with similar, like-minded, agreeable people.

However, if you structure your project team to avoid differences, you will avoid some difficulties but when you shun differences, you also lose a lot. Differences and different perspectives bring fresh ideas, creativity, and

innovation. Without differences, an organization is composed of mere "yes-men".

No matter how hard you try to assemble a team of people that all think and act alike, positively, and in agreement, you are probably never going to achieve it. Statistically, you are going to encounter negative personality traits at some level or another and it is compulsory that you know how to handle them or they will spell disaster for your project.

Remember that the people who are involved in your project and especially those who will be attending the project meetings, are the same difficult people whom you interface with on a daily basis. They have simply been assigned to work on your project team and they will be bringing their attitudes, prejudices, behaviors, and dislikes along with them.

Add to these factors the fact that everyone has a "bad hair day" once in a while, and you have got a whole load of people problems that have to be addressed at the same time you are managing your projects.

People problems, and the attitudes that cause them, have to be handled with a dose of psychology because unlike a rusty valve, people do not respond well to being beaten with a rubber mallet. Once you begin to understand and categorize the difficult people (or rather their difficult attitudes) and how they can be handled, you will get them to respond positively and become an asset to your project.

Waiting, worrying, or hoping that the problems will correct themselves, also allows the problems to get worse while giving you stress and shortening your affectivity as the project manager. What is just as important is for you to establish a position of authority based on your knowledge and experience in dealing with these problem personalities.

If you do not deal with them immediately and effectively, you will quickly establish a reputation for being non-effective and the team's support and cooperation will diminish because of it.

Some of these behaviors will only show up in your meetings while others will be there even when you are alone with them and regardless of when, where, or why they appear, you must handle them immediately so that the individual gets back to a productive cycle. In fact, if you ignore these situations, they almost always get worse, causing employees to be fired, projects to fail, volunteers to quit, and everyone to feel miserable.

Attacking the person responsible for the problem is an attempt to fix the problem, but attacks, rage or irrational anger gives you a bad name, makes people afraid of you and reduces honest communication. Eventually, the project and possibly your position as project manager will suffer.

Giving in or disconnecting from the problem or the person involved is not always wise or practical either. Losing employees, vendors and team members because you needlessly disassociate from them may reduce your stress, but you are not really solving the problem.

You are someone who has been tasked with managing a project – probably not a trained psychologist specializing in effective employee interaction (my apologies if you are) – so the simplest (and probably the best) solution is to identify the problem behavior and handle the people who are causing the problem by getting organized and working out a plan of action.

We have listed the major problem personality traits that you are most likely to encounter, along with the most common solution to addressing the trait. If the problem cannot be resolved on the spot, you still need to address the individual, so here is a quick method of planning and preparation to handle people problems.

1. Write down the exact problem you need to handle and your goal for the confrontation. List the points you need to make to support your goal including facts, reasons and explanations you may need the other person to understand.
2. Write down objections, reactions or disagreements the other person may have. Include everything you are afraid might happen during the meeting. Putting specific concerns and fears in writing reduces their impact on you.
3. Arrange a meeting with the individual where you will not be disturbed and explain the specific problem you want to resolve.
4. Listen carefully to the other person and make certain they feel understood but be sure to hold a position on your points.
5. Do not give up. Communicate and persist for as long as it takes to reach your goal.

We would all like to be liked and respected by everyone on our project team but realistically, it simply is not going to happen because we cannot please everyone all the time.

Remember that your job is to get the project accomplished and I doubt if the project's goals included keeping everyone involved happy and liking you. However, when you confront and handle everyone involved in the project fairly and evenly, people respect you for your courage, honesty and your control. By setting the standards for objectivity, your associates, employees or team members will follow your example and become more productive.

Having spent many years in business, I have experienced just about every kind of problem personality trait you can imagine. Some are more destructive to the project than others but all of them require your attention if you are going to make the project work the way it is supposed to.

As a project manager, you will spend part of your time (and rightfully so) managing the people who actually make

the project a success. And even though you did not sign on to be the organization's clinical psychologist, you are going to have to "get into the heads" of the people involved when personality problems arise that affect you.

Here are three key points to consider when you are attempting to solve these people problems.

○ **Separate relationship issues from project issues** – We cannot always work with just the people we like, admire, or respect. Sometimes we simply do not like the people we have to work with but that must not prevent you from being effective as team players.

○ **Be unconditionally constructive** – One of the worst things we can do as project managers is to criticize team members because they have done something wrong or their efforts have been ineffective. It is far more productive to applaud their efforts and to see what valuable lessons can be learned from the failure.

○ **Balance reason with emotion and use persuasion, not coercion** – Projects, and the management of them, tend to become personal and we are bound to get emotional. Things are going to go wrong (that is why you are the project manager – to handle them) and depending on what is happening in your life, the natural human tendency is to get emotional with the people who are involved and perhaps threaten or try to coerce them in an attempt to get the project back on track. Resist the urge to escalate the situation by looking at the reasons behind the problem, and calmly and rationally work out the problems.

Primary Personality Characteristics

Here are the primary personality characteristics that you will encounter and what seems to work best to handle the situation. These will usually occur in the project meetings

but be prepared to have them occur in the hallway, the lunchroom, or in your office.

Note that some of these traits are inherent in the individual and often occur whether you like it or not because you have "inherited" team members who are somewhat incompatible with the goals and objectives of the project.

Be open to the fact that some of these characteristics may be so destructive or disruptive that you cannot handle them, and that you are going to have to circumvent the individual or find a way to get rid of them before they sabotage the entire project.

Personality Trait	How to Address the Trait
Bullies overwhelm by bombarding others, making cutting remarks, or throwing tantrums when situations do not go the way they think they should.	• Give them time to cool down. • Attempt to acknowledge the aspects of their ideas that you believe are true, important, or relevant, remembering that acknowledgement does not have to mean agreement. • You must hold your ground and stand up for your position. Consistently backing down or changing your ideas to appease them will tend to reinforce their aggression.
Complainers gripe incessantly but never do anything to resolve what they complain about. Their primary objective is to let the team members know that they are present and demand to be acknowledged.	• Calmly disagree with them. Remaining silent or agreeing with them for the sake of quieting them (when you actually disagree) will only encourage more negativism. Firmly stating positive opinions stops their growing momentum of criticism. • Overlook brief negative comments in conversation by continuing to talk about the original subject as if the negative comment was not made. This lack of acknowledgement will discourage their negativism.

Personality Trait	How to Address the Trait
Know-it-all experts are "superior" people who believe and want others to recognize that they know everything there is to know about anything worth knowing about the project and the tasks related to it. Such people are condescending, imposing (if they really do know what they are talking about), or pompous (if they do not). Often they make others feel like idiots.	• Try to give them credit and acknowledge their expertise whenever it is appropriate. • Be prepared to gather more objective data and facts for discussions with experts than you would for a typical meeting. Logical evidence, when presented clearly and calmly, is often the most persuasive material to use with an expert.
Silent and unresponsives respond to every question and every plea for help with a yes, a no, or a grunt.	• Ask open-ended questions to show such persons that when they speak with you, they are expected to elaborate more than they usually do. • Be prepared to re-schedule meetings or arrange follow-up discussions with unresponsive people. Do not allow them to think that issues will be dropped if they ignore, show apathy towards, or neglect them.
Super-agreeable people commit to tasks but they do not produce what they say they will, or they act contrary to the way they have led others to expect. These people are very difficult to handle. They commit to tasks but never get them accomplished and when confronted by their lack of performance, they get hostile. When someone steps in and offers to take over the project task for them, they get territorial and highly defensive to the point where they may storm out of the meeting and create major problems for the team and the project.	• The best solution to this problem is to remove the individual from the team as soon as possible. • Their insincere commitments and subsequent lack of performance threatens to jeopardize everyone else's work. • Another solution is to assign them tasks that are inconsequential or that can be handled by someone else if the need arises.
Perfectionists become negative if something is not perfect. This person's standards of performance are not realistic, and even excellent work that is praised by others is unacceptable to him or her.	• Do not take these people's statements seriously. They are expressing their own inadequacies, not yours. • Try to work with them so that they can set realistic expectations for themselves and others.

Personality Trait	How to Address the Trait
Uncommitted people do not take their job seriously, making their teammates' work more difficult. Work is a very low priority for them and their focus at work is trying to do as little as possible so as to find time to take care of personal matters or other interests. They sense no urgency in getting the work done. Their favorite saying is "It can wait."	• Uncommitted people need to have clear goals, standards, and expectations established and then communicated to them. • They also need close monitoring to see how they are performing.
Crybabies behave like a child who does not get his own way. Not getting their way causes negativity. They frown, withdraw, go off on a tirade, and literally cry.	• These people are usually legacies who are assigned to a project because of circumstance. • If you must work with this kind of individual, be prepared to supply a supportive environment and constant encouragement that they are doing well. • You also have to lower stress and pressure levels on this person.
Criticizers will knock down a creative approach, a different way of doing something or a new suggestion. Their mission is to disagree with anything that is said. They like to be right, no matter what, and finds problems rather than opportunities wherever they go. They seldom, if ever, give you positive feedback but will always jump on your mistakes and their favorite saying is "Bad idea."	• Since criticizers like to give negative feedback but are rarely specific, ask them for examples, evidence, or their reasoning for disagreeing. • Emphasize that you are open to incorporating their concerns to make the project as good as possible but must have specifics to justify them. • Emphasize that you value their opinion and want to understand their concerns. Usually, they will see that it is too much work to criticize you, because you always press them for more information that they cannot give.

Personality Trait	How to Address the Trait
Negativists or pessimists object "It will not work" or "It is impossible" when a project is proposed. All too often they deflate any optimism others might have.	• These are people you need to get off the team, if possible. • If you cannot, know that you probably will not be able to change a pessimist's attitude easily. So, for a start, focus on having him adopt some new specific positive habits to take the place of his existing negative ones.
The **Not-My-Job-er** individual expresses negativity by refusing to do any task, no matter how simple, if he decides it is not part of his job responsibilities. For such individuals, it is often their way of getting back at colleagues, managers or the organization itself because of their unhappiness with how they are being treated. Their favorite saying is "It is not part of my job description to do that."	• These are usually legacy members that you have inherited as a part of the organization or the project. • Try to work with them in the areas where their job descriptions fit the project. • If their negative attitude persists, remove them from the project.

Projects and the meetings, deadlines, budgets, and interaction connected with them tend to bring out the best and worst in communications skills and styles. Since projects tend to be team efforts, the more effective the communications are, the more likely the project is to be successful.

As a project manager, you MUST be prepared to encounter different communications styles and more importantly, to not just accept, tolerate, and handle them, but to learn how to use them effectively.

Always bear in mind that the rational, objective person has the upper hand. Do not be intimidated by bullies and the badly behaved people involved with your projects. Realize that many of the attitudes, and the communication styles associated with them, are the result of fear.

Reacting in the same, aggressive way as the attacker will only make things worse, as will becoming a doormat and

allowing them to ridicule and abuse you. As the project manager, you have to maintain your dignity and self-respect, while at the same time not being perceived as threatening or cowering. Stand up straight, and show no fear.

Find out what the person wants to achieve and exactly what the problem is. Be empathetic and ask questions. The more questions you ask, the more the other person is forced into their logical left-brain, and by interrupting the emotional flow by asking questions, you will eventually get him to calm down.

Develop an action plan to resolve the problem, allowing the person to participate in the process, so that he thinks it is his idea. Let him feel that he has won and help him to save face. Remember, they are probably embarrassed by the bad behavior and looking to justify it. So give them a way out, preferably an action to take.

That's it, boys and girls! Now get out there and manage those projects!

GLOSSARY OF COMMONLY USED TERMS IN PROJECT MANAGEMENT

As your career in project management continues, you will hear and see a lot of terms that have specific meanings when used in the context of project management.

The terms listed below are the most commonly used along with their meanings as defined by a lot of people who are currently managing a lot of successful projects.

Accountable - Accountability equals Responsibility plus Authority

Activity - The work or effort needed to achieve a result.

Activity Description - A statement specifying what must be done to achieve a desired result.

Authority - The power or right to make decisions.

Big Hairy Audacious Goal (BHAG) - A highly focused, compelling goal that is seen as attainable but the means to achieve it is not yet known.

Change Order - A document that authorizes a change in some aspect of a project.

Consult - Seek an opinion.

Control - The practice of monitoring progress against a plan so that corrective steps can be taken when a deviation from plan occurs.

Critical Path - The longest sequential path of activities that are absolutely essential for completion of the project.

Customer (a.k.a. Client) - The user of the project deliverables or product.

Decision - A choice made from among several alternatives.

Decision Analysis - A methodology for facilitating high quality decisions.

Deliverable - An agreed outcome.

Deviation - Any variation from planned performance, usually in terms of schedule, cost, functionality, operability or scope of work.

Float - A measure of how much an activity can be delayed before it begins to affect the project finish date.

Gantt Chart - A bar chart that indicates the start date and time, the end date and time, and the duration of each activity in a project.

Inform - Make known the outcome of decisions.

Learning - The process of gaining insights from the current process/activity or new knowledge from other processes/ activities whose implementation will improve the planned or current process or activity.

Milestone - An event of special importance, usually representing the completion of a major phase of project work.

Ongoing Operations - Repetitive work with no defined end.

Peer Review - A review of a design or plan made by a team of experts with the aim of increasing confidence in the design or plan.

Project - Work that happens one-time only and has both a clear beginning and end.

Project Execution Plan (PEP) - A plan that provides a macro view of what is to be done; it summarizes the project itself.

Project Management - The planning, scheduling and controlling of those activities that must be performed to achieve project objectives.

Project Management Plan (PMP) - A plan that summarizes how the project will be managed.

Project Manager - The person who has total responsibility for ensuring that the project is completed on time, within budget, within scope and at the desired performance level.

Purpose - The reason an organization exists – besides making money!

Quality Assurance - The design and implementation of design features and procedures to ensure that specifications can be verified.

RACI Chart - A matrix that defines roles in terms of who is Responsible, Accountable, Consulted, or Informed.

Responsible - Performs the work.

Risk - The possibility that something can go wrong and interfere with the completion of project work.

Risk Log - An interactive log containing a description of all identified risks, their rating and the actions planned to overcome them.

Scenario - A postulated sequence of future events.

Sponsor - The person who orders that a project be done.

Stakeholder - Any individual, group or organization that can affect, or be affected by, the project.

Statement of Work (SOW) - A formally agreed list of the goals, constraints and success criteria for a project.

Strategy - The pattern of moves and approaches devised to achieve organizational objectives.

SWOT analysis - Analysis of an organization's Strengths, Weaknesses, Opportunities and Threats.

Uncertainty - Something that is partially or completely unknown.

Values - Standards an organization lives by.

Variance - Any deviation from plan (in term of cost, schedule, performance, etc.).

Vision - A description of the future you wish to create.

Work Breakdown Structure (WBS) - A method of sub-dividing work into smaller and smaller increments to permit accurate estimates of durations, resources required and costs as well as to assign tasks.