

LESSONS IN PROJECT MANAGEMENT

BY TOM MOCHAL
AND JEFF MOCHAL

2nd
EDITION

Apress®

LESSONS IN PROJECT MANAGEMENT

Tom Mochal and Jeff Mochal

Apress®

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My work on this book is dedicated to my wife Pam and my (now grown) children Lindsay, Sean, and Ashley. Without their love, support, and good humor, none of my work would be possible.

—Tom Moch

For my wife Erika and our two amazing kids Emelia and Samuel. Thank you so much for your constant support and unconditional love. Special thanks to my brother and co-author, Tom, for allowing me to help tell these great stories and lessons on project management.

—Jeff Moch

Contents

About the Authors

Introduction

The Year Begins—On a Slippery Note

Chapter 1: Understand the Characteristics of a Project

Chapter 2: Always Have an Identified and Committed Sponsor

Chapter 3: Report Status on All Projects

Chapter 4: Focus on Deadline Dates

Chapter 5: Apply Some Level of Project Management Discipline

Chapter 6: Define and Plan the Work First

Chapter 7: Don't "Microbuild" or Micromanage the Workplan

Chapter 8: Hire a Diverse Project Team

Chapter 9: Define the Many Aspects of What Is In Scope and Out of Scope

Chapter 10: Use the "Big Three" Documents

Chapter 11: Use Scope Change Management

Chapter 12: Collect Metrics

Chapter 13: Give Performance Feedback Routinely

Chapter 14: Ensure Issues Management Is Everyone's Responsibility

Chapter 15: Shorten Long Meetings to Sharpen the Focus

Chapter 16: Identify the Root Cause of Problems

Chapter 17: Use Quality Assurance to Validate Project Status

Chapter 18: Cancel Projects That Lose Business Support

Chapter 19: Use Risk Management to Discover Potential Problems

Chapter 20: Focus Quality Management on Processes, Not People

Chapter 21: Don't Use Your Estimating Contingency for Scope Changes

Chapter 22: Develop a Communication Plan for Complex Projects

Chapter 23: Scale Your Processes Based on Project Size

Chapter 24: Plan the Project Even If You Start the Work at the Same Time

Chapter 25: Identify the Critical Path and How This Path Drives the End Date

Chapter 26: Change Assumptions to Revise an Estimate

Chapter 27: Don't Forget Face-to-Face Communication on Your Project

Chapter 28: Make Quality a Mindset and Ongoing Process

Chapter 29: Batch Small Scope Change Requests for Sponsor Approval

Chapter 30: Manage Your Vendor Projects Proactively

Chapter 31: Look for Risks Inherent to Your Project

Chapter 32: Get Sponsor Approval Before Investigating Large Scope Change Requests

Chapter 33: Make Sure the Cost of Collecting Metrics Does Not Exceed Their Value

Chapter 34: Use Multiple Estimating Techniques

Chapter 35: Keep Your Schedule Up to Date

Chapter 36: Use Issue Management to Choose the Best of Bad Alternatives

Chapter 37: Collect Metrics That Can Lead to Fundamental Improvements

Chapter 38: Evaluate All Risk Response Options in the Risk Plan

Chapter 39: Manage Client Expectations

Chapter 40: Use Milestones to Track Overall Progress

Chapter 41: Catch Errors as Early as Possible

Chapter 42: Gain Sponsor Approval for Scope Changes Requiring Budget and Deadline Deviation

Chapter 43: Be Proactive to Accelerate the Project Schedule

Chapter 44: Use the Work Breakdown Structure to Identify All the Work

Chapter 45: Write Your Status Reports from the Reader's Perspective

Chapter 46: Update Your Risk Plan Throughout the Project

Chapter 47: Don't Deliver More Than the Client Requested

Chapter 48: Make One Person Responsible for Each Activity

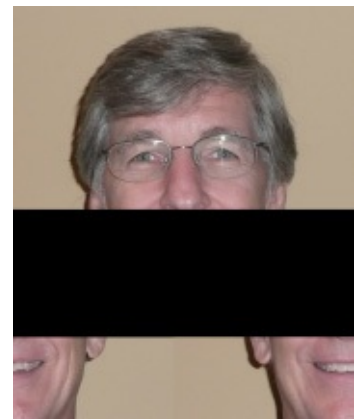
Chapter 49: Focus on Deadlines to Keep Your Project from Wandering

Chapter 50: Gain Agreement on Project Metrics Ahead of Time

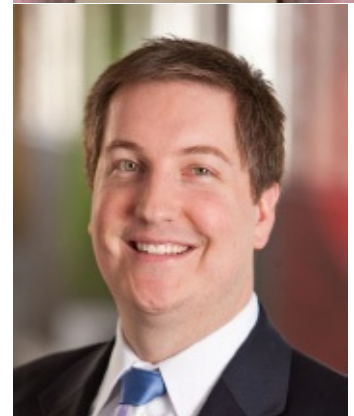
Year-End Recap

Index

About the Authors



Tom Mochal, PgMP, PMP, TSPM is the President of TenStep (www.TenStep.com), a management consulting and training company with over 50 offices around the world. Tom is also the author of 10 additional books on a variety of project management, people management, and related topics. Tom is an internationally recognized speaker, lecturer, instructor, and consultant to companies and organizations around the world. He won the Distinguished Contribution Award from the Project Management Institute for his work spreading knowledge of project management around the world.



Jeff Mochal is currently Director, Communication and External Relations for ConAgra Foods, a Fortune 500 food company with net sales of \$12.7 billion. Jeff is responsible for external communication for ConAgra Foods, developing and executing key media relations strategies designed to strengthen the reputation of ConAgra Foods and its brands with key stakeholder groups. Jeff has extensive expertise in crisis communication, issues management, change management, employee engagement, and media relations. He currently lives outside of Chicago and is pursuing his MBA from the University of Notre Dame.

Introduction

This book represents insights and experience gained from 30 years of experience working on project managing projects, and managing people who were managing projects. Like most project managers, I didn't learn formal project management before I started managing projects. Initially, managing projects just meant determining the work that needed to be done and working with one or more people to get it done. After managing projects a few times, I became more comfortable planning out the work and managing it to completion. These projects ranged from small and large enhancement projects to multimillion dollar initiatives.

This type of project management experience is typical of the way most people learn to manage projects. Most project managers have very little formal project management training and no mentoring at all. They do, however, have good organizational skills and a good feel for the work needed to complete the deliverables required for the project. If they are really good, they also have decent estimating skills, which will ensure they have enough budget and time to complete the project.

That was my story until the mid-1990s, when I was a director at a large beverage company. When I took the position, I inherited a number of projects—one of which was politically sensitive and under pressure to finish within a six-month deadline. The approach of the previous project manager seemed reasonable enough; however, it became clear the work involved with the project has been greatly underestimated. For a variety of reasons, the project took almost 18 months to go live—not the six months originally estimated.

The most frustrating part of this project for me was not being able to provide the guidance and coaching needed for the project manager. I didn't have the formal project management knowledge required to rescue it. At one point, I even set up daily meetings with the project manager, but it seemed a case of the blind leading the blind.

My next assignment at the same company was to build a Project Management Office (PMO) and to deploy formal project management processes throughout the worldwide IT organization. I started as the contributor on this project and gradually acquired more responsibility until I became the program manager of the entire initiative. This allowed me to make the transition from the typical “seat-of-your-pants” project manager to one who understood the methodology side as well. When your job is to build the methodology and coach and train others, you gain an in-depth understanding of project management and how to do it well. So, that is what I did for three years.

After three years, I decided to leave the large company and I thought a lot about what I had learned. I spent most of my career managing work without formal project management training. Now I had formal training and experience using a large scale mega methodology. I wanted to apply my background and experience to create a project management process that project managers would understand and accept. The result is the TenStep[®] Project Management Process (TenStep) available at www.tenstep.com.

When I developed the TenStep Process, I focused on two overriding principles. First, the methodology would be scalable, meaning it would be easy to understand and apply for project managers managing small, medium, and large projects. This allows project managers to manage small projects with

minimum level of project management structure and not feel guilty. It also applies a much higher level of project management structure to large projects without apology.

Second, the 10 steps of the TenStep methodology would be aligned in a way that represents progression of project management competencies. The lower steps represent processes every project manager should practice on every project. As the steps get higher, more rigor and sophistication are typically required, especially for larger and more complex efforts.

When I worked in the large PMO, I also had the pleasure of coaching and training project managers around the world. As I was doing this coaching, I realized it was easier for project managers to learn if I included examples within the lessons. For instance, it was easier for project managers to learn change management if I could apply the principle to their projects, including specific examples of applying scope change management plus instances of misusing the process. If I couldn't think of examples relevant to specific projects, I would come up with examples from other projects to which they could relate.

This book is the culmination of that teaching method. The marketplace is full of project management books, columns, best practices, tips, and traps. The question is not "Can you find project management techniques?" The question is "Will you remember the right techniques at the appropriate time to apply it on your project?"

Let's face it: very few columns or books are compelling enough to be read over and over again. That's the case with project management content. Project management books tend to get read once (or maybe just scanned) and never picked up again. I felt I could communicate a project management lesson more effectively if I could tell a story, a parable perhaps, that showcases a project management lesson. The reader would have the context of how the lesson really applies on a project. The lesson would then be easier to understand and, more importantly, to remember.

This book applies 50 important project management lessons in 50 easy-to-digest stories. In addition to the main lesson, each story also mixes in other project management concepts and definitions. I hope you find the information in this book valuable in your job, and I hope you can apply the lessons to your projects.

—Tom Moch

The Year Begins— On a Slippery Note

The snow was still falling, although lightly and with fewer flakes, as I stared out the bedroom window on the morning of January 4. I could already smell the coffee brewing downstairs in the kitchen, and I longed to pour myself a cupful to warm my insides. But last night's snowstorm had made a mess of the driveway, and I knew the only way my family and I were getting out of the house today was to start digging now. The storm had deposited about six inches of heavy snow, and it took about an hour to carve a clear path from the garage to the street. Time to invest in a snow blower, I thought.

The morning shovelling took much longer than anticipated, leaving me barely enough time to grab a shower and get dressed, let alone have breakfast with my now-awake wife, Pam, and our 5-year-old son, Tim. Sensing my anxiety and realizing I was running late, Pam poured my coffee and cream into a cup-sized Thermos and wrapped a couple pieces of toast in a paper towel. I grabbed both items, planted kisses on Pam and Tim, and headed out the garage door to start my day.

I had barely driven a block when I felt the back end of my Honda turn to the left, against my wishes, and begin skidding toward the curb. As I came to a stop, I could see in my rear-view mirror that the newly fallen flakes were hiding patches of ice underneath. The day had just begun and I had driven less than a half-mile from my house, but I knew one thing for certain—I was going to be late for my first day as Project Management Advisor at Mega Manufacturing.

Mega Manufacturing is the nation's fifth largest manufacturer. Like all large companies, they have a lot of projects and they want to improve how they manage these projects. The perception is that projects take too long, cost too much, and don't fully meet the company expectations.

One way to implement project management processes in a large organization is through a focused Project Management Office (PMO). Mega Manufacturing realizes this. Our company President wanted to start a major initiative this year to build a PMO and then use the PMO to build a better environment for project success. The plan was to start building a PMO in the IT organization and then elevate that organization to be an Enterprise PMO. However, budget tightening and a number of other business priorities forced this broader initiative to be postponed for a year.

I have been working at Mega for ten years and was recently assigned to a new position as Project Management Advisor. My position was funded as a temporary measure to start to prepare project managers for this larger initiative. It was a good opportunity for me, and I was excited to use my knowledge of project management to help others in the company become more efficient and successful with their projects. When I took the job, I knew I would have an opportunity to work with many project managers—some well trained and highly experienced, and some brand new to the concept. Jerry Ackerman was in the latter group. I was meeting him first thing that morning. I hoped that meeting went better than my morning commute.

Understand the Characteristics of a Project

Jerry and I had scheduled a meeting prior to the company closing for New Year's Day, and I found him waiting outside my office when I arrived.

"Jerry, I am terribly sorry to be so la—"

"Tom! Good to see you," he interrupted. "Don't be silly about being late. I just got here 15 minutes ago myself."

"It took me longer than anticipated to get the snow shovelled this morning. I must be moving slower in my old age!"

"A shovel? We need to get you a snow blower!"

I smiled at his suggestion, recalling I had similar thoughts just a few hours earlier.

Jerry and his wife, Barbara, were trying to buy their first house, but the hunt for the perfect home had been long and difficult. He shared some of those struggles with me, and we talked at great length about the house my wife and I purchased a few years ago.

"The right house will come along, Jerry. Did you see any you liked this weekend?"

"Not really, Tom. We looked at a few open houses on Sunday, but the weather prevented us from looking at any more. We are trying to remain optimistic, but it's really starting to drive us crazy."

"Well, stick with it," I said, trying to sound reassuring.

Jerry was a relatively new employee who worked in the Information Infrastructure department. He had big, blue eyes and a thick head of hair with shaggy sideburns. The sideburns and bushy hair gave him the slightly nerdish appearance that many people have come to expect of people who work with computers. If it was possible to tell such things based on a person's appearance, he also looked like someone who liked to work with technology more than people. He had just been given the responsibility of upgrading the company's phone system but wasn't sure he was ready for the task. The work involved inspecting the phone lines, replacing the lines where needed, and upgrading the software. Jerry predicted the effort would take four months to complete and cost upwards of \$350,000. There would be six people involved, although not all full time.

After talking awhile longer about his house-hunting experiences, I asked Jerry if he wanted to talk a bit about his upcoming project.

“Sure,” he said. “Actually, I am not sure there is anything you can help me with. Aren’t you supposed to help project managers?”

I was initially taken aback, thinking I had perhaps missed something. “Well, yes. But it sounds like you have a pretty important project. Are you an experienced project manager?”

“Project? Project manager?” Jerry questioned, sounding unsure. “We don’t do projects in this department. We just go ahead and get the work done.”

The light bulb went off in my head, and I knew I was going to have my hands full. Not only was Jerry an inexperienced project manager, he didn’t even know he was the project manager!

“Jerry,” I said, “let’s talk.”

LESSON

Most work typically falls into one of the following categories:

- **Support work** is associated with keeping current production processes working and stable, such as fixing a crashed computer application.
- **Operations work** is associated with the ongoing execution of a company’s business processes, such as entering accounting transactions or ordering supplies.
- **Overhead** includes vacation and sick time.
- **Management and leadership** is associated with the time spent managing people and moving the organization forward to achieve its business goals.
- **Projects** are temporary work used to do new things and build new or enhanced products.

Project work is the area of interest in my new job. Projects are not something only certain departments do—they are how work gets done. In fact, projects can exist in any functional area. This is a key difference between the work a person does and the organization where that person works. For instance, your department may execute some projects as well as perform support type work. Your operations area may execute projects as well as operations work. Your management team may even do projects in addition to their management work. This highlights the difference between your functional group and the actual type of work you perform. Although there are differing definitions of projects, all projects have three major characteristics—a finite time frame, uniqueness, and deliverables.

First and foremost, a project must have a start and end date. Although one could quibble about the exact dates, there must be a time before the work existed and there must be a time when the work no longer exists. Entering transactions into an accounting system, for instance, is not a project because the activity goes on indefinitely. Answering questions from the users about the accounting system software is not a project either, since those questions will be asked indefinitely as well. On the other hand, Jerry’s work to upgrade the phone system was not happening before, and at some point it will be completed (even if it goes over its deadline, it will either be completed or cancelled). The phone system may be upgraded again, but if that happens, there will be a time gap between the upgrades, so the work is not continuous. The next upgrade will have a start and end date as well.

All projects are also unique. They have unique characteristics, unique deliverables, unique people, and unique circumstances. As a contrast, if you worked for the help desk, over time you would begin to master your job since there is a certain rhythm and pattern to the work. Once you get some experience, you find you can handle the repetitive nature of the work by following a certain set of processes and procedures. This is an example of ongoing operations. Working at the help desk today is similar to

working there yesterday and it will be similar tomorrow and a year from tomorrow.

On the other hand, projects are unique. This characteristic makes them hard to estimate and hard to manage. Even if the project is similar to one you have done before, new events and circumstances will occur. Each project typically holds its own challenges and opportunities.

Lastly, all projects produce one or more deliverables (deliverables also may be called *products*). These deliverables could be anything from a computer application to an analysis document; from a recommendation to a new house. If the work does not result in the creation of one or more deliverables, then it is not a project. Even if your project is building a service, you would have deliverables such as a procedures manual, training classes, and perhaps marketing literature.

Most people also assign other characteristics to projects. These include a defined scope, a defined set of resources (people, money, equipment, supplies, etc.), common objectives (stated or unstated), and an assigned project manager and project team.

It is important to note there are no upper or lower limits in terms of effort, cost, or duration. A project might take 10,000 hours to complete, or it might take 10 hours to complete. Very small projects are typically called *enhancements* or *discretionary requests*. Of course, how one manages these small and large projects is not the same. The 10 hour project probably does not have any formal project management techniques applied to it at all. A large project will require much more rigor and structure.

Projects can be found in all types of businesses—from marketing to manufacturing to movie studios. Yes, even in the Information Infrastructure department where Jerry works! How many times have major initiatives failed because they were not organized and managed as a project? Many, many times. Jerry wants to just “get the work done.” That type of thinking is fine for a 40-hour project where work can be planned and defined in your head. However, this initiative is too big, too complex, and too important for Jerry to manage in his head. He will have a better chance of success if he defines, structures, and manages the work as a project. When I meet with him next, the education process will continue.

Always Have an Identified and Committed Sponsor

The next day I had an opportunity to meet with Ashley Parker, the project manager on a large Marketing information database project that was just beginning a major new phase. Ashley was married and had two children. She often volunteered at her kids' school and helped out once a month at their neighborhood church. She was wearing dark pants with a plain red turtleneck and red-framed glasses when she came into my office at a little past 2 p.m. Good, solid business clothes—nothing fancy, but nothing odd either. On second look, the red glasses did give her a bit of pizzazz. Her hair was shoulder length, and she stood about 5' 3", even with heels on. She had a solid image, but I'd soon see if she was a solid project manager. I had known Ashley for about three years, although we had never really worked together before.

"Hello Ashley. How are you?" I asked as she entered my office.

"I am doing okay, I guess. Am I interrupting you?"

"Not at all. I'm just filling out a form for new business cards."

Ashley smiled and sat down in the chair in front of my desk. She had a look of concern on her face, so I asked her to give me an update on her project. She informed me that her team had just completed phase one of the project. The next phase needed to start right away, but she wasn't sure the business client was fully involved. The original business sponsor had recently been reassigned, and Ashley hadn't met the new manager in that role.

We discussed her situation for a few minutes.

"In today's rapidly changing business environment, it is not uncommon for companies to experience turnover of key project resources," I explained. "The Marketing and Sales department seems to have more people coming and going than most. That's one reason it makes sense to break large projects down into phases, each of which can be managed as an individual project. You are very smart to use this approach. Whenever you complete one phase, you always have a chance for a checkpoint to make sure everything is ready to proceed to the next phase."

"Thanks," she responded.

"Did you complete a Project Charter document before the project started?" I asked.

"Yes, I did," she answered.

"How old is it?"

“It was written and approved four months ago.”

“I assume your previous sponsor approved the project. Has the new sponsor seen the Project Charter?”

“I don’t think so,” Ashley responded. “He has so many things on his mind; I don’t think our project is on his radar screen yet.”

“You are entering a new phase,” I confirmed with Ashley, who nodded. “Have you updated the Project Charter to reflect the new work?”

Ashley shook her head. “We haven’t been able to get the time we need from the sponsor and the client to validate the remaining work.”

“Okay, the worst thing would be to continue the project without business involvement and then have to redo much of the work later on—or even cancel the whole project for lack of sponsorship. Let’s not keep things going based on their own momentum. Now is the time to revalidate business commitment and sponsorship, and make sure you are still on the right track. Then you can refocus the team for the next phase.”

LESSON

The term *client* is used in multiple contexts. Sometimes the term refers to a specific person and sometimes the term refers to the group of people receiving the project benefit. For instance, if you say, “The client asked us to include some new requirements,” you may be referring to a specific person or you may be referring to the generic client organization. Some organizations use the term *customer* or *user* to refer to the person or group receiving value from the project. At Meg Manufacturing, we use the term *client*.

Sponsors have ultimate authority over projects, and they are almost always within the client organization. In most companies, the simplest way to identify the sponsor is to ask who is providing funding for the work. The sponsor also resolves major issues and changes, approves major deliverables, and provides high-level direction. The sponsor acts as a champion for the project within his or her organization—and elsewhere as needed. If the project is large and the sponsor is senior enough in the company, he or she may take on the role of executive sponsor and delegate the day-to-day decision making to a lower-level project sponsor.

Typically, a project would not get funded or started without a sponsor. However, in some projects, the sponsor tends to sink into the background and does not remain actively engaged in the project. When this happens, the client organization can start to lose interest and focus. Good project managers should make sure this never happens. The sponsor should be kept as actively involved as possible. To accomplish this, project managers should meet with the sponsor regularly, keep him or her informed of project progress, and frequently ask for direction and advice.

All projects need an active sponsor—either an executive sponsor or a tactical project sponsor. If the project does not have an active sponsor, the project manager may feel obligated to fill the void and make many of the business decisions that are really the responsibility of the sponsor. This may keep the project going in the short term but almost always results in a less than optimal solution from a business perspective.

Unfortunately, even an engaged sponsor sometimes leaves in the middle of a project. This is the situation Ashley faces. She has a project in progress and is ready to move from one phase to the next.

Many project managers would be tempted to just keep the project moving and continue working until someone tells them to stop. Ashley, however, recognizes that this is not right because two very big problems can occur.

First, new sponsors have new ideas and new requirements. To a certain extent, that is the privilege of being the sponsor. Ashley wants to make sure she understands any differences between the desires of the old sponsor and the new one. Otherwise, she may end up having to perform more work later when the new sponsor finally has more time to pay closer attention.

Second, transitioning from one sponsor to another can lead to a lack of focus from the client organization. Ashley recognizes this since she told me her clients were not as engaged as they should be. This usually manifests itself in the form of unanswered phone calls, unreturned messages, missed meetings, or missed deadlines. In Ashley's case, the loss of focus from her client organization was probably directly related to the loss of her original sponsor.

It's not easy to stop a project, especially since the resources allocated to the project could become idle or could potentially be reassigned. However, Ashley cannot continue without an identified sponsor and client commitment. She should talk to her manager and the client manager about validating who the new sponsor will be and get him or her engaged soon. If the project is still important to the client, Ashley should be able to get a new sponsor involved, reenergize the client group, and continue the work. If she cannot get a new client sponsor, she and her manager need to put the project on hold. This would be a potentially painful step, but not as painful to the company as completing an irrelevant project. Once clients understand that a project will be put on hold, they will have to make a decision on its relevant importance. If it is important enough, it will receive the proper level of focus. If not, the project will probably not be continued.

Report Status on All Projects

Mega Manufacturing is headquartered in Dickens, Illinois, population 90,000. The laid-back town is located about 55 miles northeast of Chicago, and Mega Manufacturing is by far its leading industry. The second biggest source of jobs in the town is Northeast Illinois State University, a small liberal arts college with an annual student population of 8,000. Pam and I moved to Dickens 11 years ago when I was hired in Mega's IT department. Several months after we moved, the university hired Pam as ticket coordinator in the Athletics department. She is currently sports information director for the university, a title she has held for the last three years.

Although fairly small, the town is genuinely charming and very beautiful, with many tree-lined streets and an open, inviting attitude. We tell our out-of-town friends our city is very family friendly, with great schools, plenty of parks, and a low crime rate. And when we want to get away for the weekend, we just hop in the car and head for Chicago.

That's exactly what Mike Miller did over the weekend. He and his family spent Saturday and Sunday in Chicago, catching a Bulls game on Saturday night. Mike was a popular employee in our office and had a great reputation as a patient, thoughtful man who would bend over backwards to help a friend or colleague. His office was full of family photos, including several pictures of his kids in their baseball uniforms, soccer uniforms, and his youngest daughter in a ballerina tutu. He asked me to stop by on January 13 to discuss a project he was doing to install document management software in the Legal department.

"How is life treating you Mike?" I asked as I entered his office.

"Oh, good and bad, Tom," he responded. "The kids and I just got back from a fun weekend in Chicago catching the Bulls crush the Cleveland Cavaliers. So that was good."

"And what's the bad?"

"Well, it's this darn project I am working on. That's why I asked you to stop by today. I could really use your advice, Coach."

I smiled. Mike gave me the nickname "Coach" at last year's annual New Year's Eve party when my transfer was announced. He liked to call people by nicknames, and I had to admit the practice carried a certain degree of charm and camaraderie. Mike always made you feel like a friend, even if you were meeting him for the first time.

"Give me some of the details, Mike. What exactly is the problem?"

"My sponsor saw a report on the desk of the finance director showing the status on a big project

underway in the finance area. He started to ask questions, and now it turns out I need to do a status report as well.”

“Interesting,” I said. “Sounds like you don’t currently report status. Is that right?”

“No, we don’t,” Mike said. “Now my sponsor wants a status report like the one from finance. This report is four pages long and contains more detail than we track here. It’s going to take us a long time to get the report done—time we could be spending working on the project.”

I could see where this was leading. “Don’t you consider communicating with your business clients part of your work on the project?” I asked.

“We were communicating fine without having to do a four-page status report. We always took time to let the client know what was going on whenever he asked. You know, it’s all this paperwork that turns people against methodology.”

“Project managers need to consider effective, proactive communication as part of their job,” I replied. “But let’s be clear: there is a difference between ‘reporting status’ and ‘status reports.’”

LESSON

Many years ago, a good project manager might have gotten away with being a poor communicator. The clients typically didn’t like it, but as long as project managers could deliver the goods, clients were inclined to let them do their own thing.

In today’s world, however, projects need to be undertaken in partnership with clients, and that partnership absolutely requires solid communication. If you are managing a large project, you may have a multifaceted communication approach. On a smaller project, the communication needs are simpler. However, reporting status is not an option. It is a requirement on all projects, large and small.

Status reporting can take many forms depending on the size of the project. The project manager may request that team members submit status reports on a weekly, biweekly, or monthly basis. These reports are used by the project manager to understand the detailed status of the work against expected target dates. These team status reports also include specific problems, concerns, and risks that team members are encountering.

The project manager also creates status updates for his or her functional manager, as well as the sponsor and other stakeholders. This status report contains summarized information that is of most interest to these stakeholders. These are typically written documents, although they could be e-mail messages or web page updates. They could even be voicemail messages.

In addition to status reports, most projects have some form of status meeting. Again, these could be at different levels. The project manager might have a weekly status meeting with members of the team and a separate status meeting with sponsors, managers, and a steering committee. Typically one meeting will not suffice, since the level of detail and audience interest is vastly different between senior management and the project team.

The main function of status reporting is to communicate project accomplishments, but you should also use it to highlight any major problems, changes, risks, etc. The purpose of status reporting is to manage expectations and to ensure that all participants and stakeholders have a common understanding of the project today and what the future looks like. No one likes surprises. Proactive and ongoing communication is the key to making it all work.

It sounds like Mike does not see proactive communication as a core responsibility of the project manager. Mike is a reactive communicator. He says he provides a full status of the project whenever his sponsor asks for it, but what he doesn't realize is this lack of effective, proactive communication is exactly what is causing the sponsor to request additional information in the form of a formal status report.

My discussion with Mike centers around two main points.

- Proactive communication is absolutely part of the job of a project manager. The ability to proactively anticipate the communication needs of your stakeholders is one of the criteria separating casual project managers from mature and professional project managers.
- *Reporting status* is not the same as a *status report*. Reporting status is something all project managers need to do. Paper status reports are just one delivery mechanism.

While the sponsor has requested a specific four-page status report he saw elsewhere, there are probably many alternatives. Mike should talk with the sponsor to determine what his informational needs are, and then provide that information. Managers do not want to see the day-to-day minutia that is occurring on the project. They usually want you to stick to the major facts and tell them if they should be worried about anything. A common technique is to report the status of a project with an overall color code of green (okay), yellow (caution), or red (in trouble). Remember as well that the status report is a recap. If any major problems or events occur during the month, you should be communicating at the time of the occurrence.

It sounds like Mike's department does not have a standard status reporting process, so he'll need to work with the sponsor on how to best meet the sponsor's desire for more project information. Generally, the sponsor will be reasonable. If certain types of information are hard to report, chances are he will not require it. As mentioned earlier, there are many ways to report status. A formal status report document may not be needed at all.

Understanding the informational needs of your stakeholders is a part of communications planning. This should be done at the beginning of a project. Mike is playing catch-up now, but this experience should strengthen his understanding of this critical project management function so he can do better in the future.

Focus on Deadline Dates

January 15 brought an unusual amount of excitement and happiness to the office, especially considering we had just been hit with our second big snowstorm of the year. I figure the joyful spirit was attributable to it being payday. I heard a lot of people talking about overspending during the holidays and how they were in need of a financial shot in the arm. I, too, spent more than I planned and was excited to get my first paycheck as project management advisor. My promotion came with a nice raise, but I wasn't sure what my new semi-monthly compensation would be after taxes. I received my paycheck by mid-morning and was pleased with the new total.

Leaning back in my office chair, I picked up the framed picture on my desk of Tim as a newborn baby and stared in amazement at how little he was at birth and how quickly he was growing. He had bright green eyes like his mother and a big head like his dear old dad. I was still staring at his picture when Lindsay Peterson arrived. Her quiet knock broke my trance, and I stood up quickly to greet her.

"Lindsay, come in, come in! Sorry I didn't see you right away."

"That's okay, Tom," she replied. "I find myself doing the same thing with my new girl."

Lindsay worked in the Application Support area and had recently returned from maternity leave after the birth of her daughter Patricia in November. Her husband Al was a carpenter by trade and made quite a lot of money as an insurance contractor. I had not seen Lindsay in several months, but she looked much the same, with the addition of black circles under her eyes. As a parent, I understood about sleepless nights with a newborn.

"So how is life with little Patricia?"

"You know, she is only two months old, but I already find it hard to remember life without her. She is such a wonderful little baby, and she brings so much joy to Al and me. We'll have to invite you and Pam over for dinner one night so you can see her."

I thanked her for the offer and took a few minutes to peruse the pictures of Patricia she pulled from her purse. She was a cute baby with a round face and blue eyes. I was a little surprised to see she was bald, though, as Lindsay and Al both had full, thick heads of hair.

"So please tell me about your project," I said, returning to my chair.

Lindsay's Application Support team did not do projects often, but when they did, the projects tended to be complex. Her current project was a good example. She was managing a complex enhancement to a Sales department application. They had the most knowledge of this package, since they supported it on an ongoing basis.

“I’m not sure what to do,” she began. “I’ve got good people on the team, but we are falling behind schedule. Some team members have been unable to allocate the time required to get the work done on schedule. Most of them are trying to balance work on my project with their other support responsibilities. When the current release has problems, they need to shift time over for that.”

“How are you managing the project plan and keeping track of end dates?” I inquired.

“Every Wednesday and Friday I ask the team to give me an update. I ask for the number of hours spent on each assigned activity and what percent is complete. The problem is it seems that the work is always 90 percent complete. By the time it’s 100 percent complete, we have missed the deadline. When I talk to people about the project falling behind, they tell me they haven’t been able to allocate the time the activity requires. If the activity takes 40 hours of effort, they don’t consider it a problem unless they go over 40 hours. If it takes them a week longer to work all 40 hours, they still think they are doing okay.”

I drilled a little deeper. “What is the purpose of asking people how many hours they worked on each activity?”

Lindsay was a little puzzled. “Having the team report hours tells me how much time they are spending on each project activity and helps me to validate how close the original estimates were.”

“Okay. I think you are getting that information,” I agreed. “But it’s not enough. You’re falling behind. What information would be the most helpful for future project planning?”

She thought for a minute. “The deadline dates are really the most important. What I really want to know is when the work will be done.”

LESSON

Have you ever managed a project where the work was always 90 percent complete? After a period of frustration, you realize that asking people what percentage of work is complete is only of limited value.

Estimating effort hours is important in setting up the original schedule and determining completion dates. But once the schedule is created and activities are assigned, the focus should switch to getting the work done on time. This does not mean actual effort hours are unimportant. They are important—especially if you are charging a client on an hourly basis, or if the project team contains contracted resources charged on an hourly basis.

However, in a typical internal project utilizing internal resources, it is easier and more effective to manage the project based on the assigned end dates. Then just one question needs to be asked and validated: When will the work be done?

Lindsay’s project showcases a common scenario. An activity may have been estimated to take 40 effort hours and two weeks to complete. Of the two estimates, the more important aspect of success is whether the work was completed within the two weeks. To a certain extent, it really doesn’t matter whether the actual effort took 30 hours or 60—as long as it is completed within two weeks (assuming, of course, there are no charges for each excess hour of work). When Lindsay receives status updates from the team, she should validate whether each activity will be completed by its deadline. If team members think it will, then Lindsay is fine. If they don’t think it will, then Lindsay can take corrective

action if necessary.

Regardless of how diligent your team members are, some deadlines will still be missed. If the work is not complete, the project manager's question is still "When will the work be done?" This line of questioning eliminates the problem of an activity being 90 percent complete, then 95 percent complete, then 99 percent complete but one, two, and then three weeks late. Asking for the completion date also allows the team member to personally recommit to a new deadline date. This personal commitment makes the team member more motivated to actually meet the deadline date.

There are reasons for keeping track of percent complete at a project level for those using Earned Value Management techniques. There are also reasons to keep track of actual effort hours. However, for schedule management, focus on when the work will be done. Managing the effort hours and the budget are two indicators of success, but managing by completion date is the best way to keep a project focused on its deadlines.

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