

Project Management Reference

Guidelines and Checklist

What constitutes a good project goal statement?

The project goal statement should be the driving force behind the project. It should be the touchstone against which everything done on the project is measured. A good project goal statement is SMART

Specific

Measurable

Agreed-upon

Realistic

Time-framed

Specific: The goal should state exactly what the project is to accomplish. It should be phrased using action words (such as "design," "build," "implement," etc.). It should be limited to those essential elements of the project that communicate the purpose of the project and the outcome expected.

Measurable: If you can't measure it, you can't manage it. In the broadest sense, the whole goal statement is a measure for the project; if the goal is accomplished, the project is a success. However, there are usually several short-term or small measurements that can be built into the goal. Caution: Watch for words that can be misinterpreted such as; improve, increase, reduce (by how much?), customer satisfaction (who decides if they're satisfied and how?), etc. If you must include them, be sure to include how they will be measured. If you use "jargon" terms, be sure that everyone who reads them interprets them the same way.

Agreed-upon: Does everyone in the organization have to agree that the project is necessary and desirable? No. Then who? Obviously, those who must do the project need to agree that it is necessary. Realistically, those individuals who control the resources necessary to get the project done need to agree that it is important. In addition, those who will be impacted by the project should agree that it needs to be done. Beyond that, agreement about the project is not likely to impact your ability to get it done one way or another.

Realistic: This is not a synonym for "easy." Realistic, in this case, means "do-able." It means that the learning curve is not a vertical slope; that the skills needed to do the work are available; that the project fits with the overall strategy and goals of the organization. A realistic project may push the skills and knowledge of the people working on it but it shouldn't break them.

Time-framed: Probably one of the easiest parts of the goal to establish the deadline. Very little is ever accomplished without a deadline. This is particularly true of work that is in addition to everything else that you need to do in your day. Building the delivery deadline into the project goal keeps it in front of the team and lets the organization know when they can expect to see the results.

Most effective project goals are between 25 and 50 words. They can be written on one side of a 3" x 5" card. They can be quoted at the drop of a hat.

What is the difference between defining a project and planning one?

In defining a project (also called defining the "scope" of the project), you are setting parameters -- building the box to hold the project plan. The plan is the detail of how the project will be accomplished. The project definition tells you what is inside and what is outside the box. It sets limits on the project. A good project definition is defense against "scope creep" that gradual (or not-so-gradual) expansion of the project as it unfolds. When defining a project, it is also important to establish the difference between the necessary components and deliverables and those that are desirable but not absolutely necessary.

One way to do this is to define Needs and Wants. This yields a short list of those things that **MUST** be part of the project as opposed to a long list of all the things that **COULD** be part of the project.

Think of Needs as "black and white" a Need must be met in order for the project to be seen as even minimally successful. A Want, on the other hand, is a "shade of grey" some Wants are more important than others but, none of them are absolutely necessary for minimum success. Rank the list of Wants in order of importance the most important at the top of the list and the others in descending order of importance down to the level of, "That would be nice but I really don't care."

Use the lists of Needs and Wants to evaluate What you propose to do with the project -- your proposed solutions. First, test proposed solutions against the Needs. Discard any that do not meet all the Needs. Next, test them against the Wants. Which solutions meet the most important Wants? Which meet the largest number of Wants? The solution that meets all the Needs and as many of the Wants as practical, is probably the best.

Once you have defined the project, you can plan to deliver the required solution.

Obviously, if you can meet all the Needs and the majority of the Wants, it is going to be seen as a resounding success. However, if all you can do is meet all the Needs and a few of the Wants, it can still be viewed as successful.

Defining Needs and Wants is an excellent way to define the scope of a project and to set the parameters for project planning. It can be a catalyst for discussion about what is really needed from the project. And, it can force realistic decisions about what can and can't be done.

What are the things I should be monitoring regularly on my projects?

Monitoring some projects is like herding cats; as soon as you get one piece pointed in the right direction, the others will find some new mischief to get in to. Still, you do have to monitor your projects in order to manage them. Tracking progress on a project should be a regular part of your daily routine, even if you have other duties that require your attention. Below are the things that should be checked on regularly.

At the most fundamental level, you need to track the differences between what was planned and what is actually happening. This includes whether start and finish dates for

activities are being met; how cost estimates are working out in reality; whether planned resource requirements are matching actual utilization; and, whether the expected outputs are being created. This may seem a bit self-evident but I have seen project after project slide further and further behind schedule solely due to a lack of effective monitoring of these most basic elements.

Regardless of the monitoring process you choose to use face-to-face meetings, e-mail, written reports, periodic group meetings, etc., you, as the project leader, have the responsibility of tracking the project. If you are not receiving the information you need, you must go and get it. Setting a clear expectation for progress and status reporting at the beginning of the project is an important step in keeping a project under control. However, if you set an expectation, for example, that status reports are to be submitted weekly, you must follow-up on it. If someone has not submitted a report by the deadline, you must contact them and get it. You can't very well make decisions about what should be done when the project gets off track if you don't know it's off track.

Monitoring the technical aspects of a project is usually where the energy is focused. Most project leaders, particularly inside organizations, are first and foremost, technical experts. In many cases, their technical expertise not their project management skills -- is why they were given the project in the first place. However, if all the attention is placed on technical measurement, there is a strong likelihood that the things that will cause problems in the project will be team and interpersonal issues. I have never seen a project team "blow up" over a technical problem. Some projects fail due to insurmountable technical problems. Project teams fail over interpersonal issues. So, in addition to the monitoring those nice clean technical tasks, you must also keep an eye on the "health and welfare" of the team working on the project.

And, while we're on the subject of difficult-to-measure items, there is always the issue of monitoring the status of your project in light of every other project that your company is undertaking at the same time. Shifting priorities plague virtually every project. Keeping a "weather eye" on the changing priorities in your environment can warn you of impending problems in time to prepare for them.

Project monitoring is a process. It needs to be done constantly and consistently. Set the pattern at the outset of your projects. Plan how you will monitor progress right along with how you will accomplish the work. Set the process in motion and keep it moving from the beginning.

What should a good status report cover?

You must keep current on the work being done on your projects. Information is the life blood of most projects. Regular, timely, accurate status reporting is critical. Different projects have different information needs, but all of them share the basic need for timely, complete status updates on a regular basis. There is no substitute for face-to-face contact with project team members. Whenever possible, you should check on status personally. This doesn't eliminate the need for a good paper trail, however. So, you should also get written status reports on a regular basis.

There are four things you need to know from everyone:

What have you done since your last status report?

In the process of doing it, what did you run into, both positive and negative?

What did you do about what you ran into, both positive and negative?
What are you going to do next?

The first and last of these should be self-explanatory. Numbers two and three, could use a little more explanation. The information from "In the process of doing it, what did you run into, both positive and negative?" should give a clear picture of both the problems and successes that have occurred. Hopefully, the status report is not the first time you've heard about a problem that someone has run into. However, having the written record is a good way to ensure that problems, and their resolution, get tracked. But, you don't want to only focus on problems. It's nice to be able to track successes those unexpected positive things that happen occasionally in the same way. This is particularly important in the case of a discovery or an idea that could impact the direction of either the work being done or the project as a whole. As with problems, you need to track what is done with the successes.

The third question, "What did you do about what you ran into, both positive and negative?" should give you the details about the resolution or disposition of the problem or success. If it doesn't, or if you feel you need more information, go after it. You can't afford to have unresolved issues wandering around loose in your projects.

When it comes to reports from people on the project team, the general rule of thumb for frequency is once a week. In some cases, once every two weeks may be enough.

Rarely, however, is a gap of more than two weeks between reports desirable. Too much can happen in that time. You need to be more on top of things than that. When dealing with your need to report status to management, whatever they request is what you should do. If the status reports from your team are complete, developing a status report for the whole project should be relatively easy just cut and paste.

How should I deal with changes to my project?

Changes to projects are almost inevitable. As project work progresses, discoveries are made, problems are encountered and solved, new requirements are discovered. All of these have the potential to change one or more of the three main constraints that bound any project -- Time (the deadline), Resources (the people, materials and money available to do the project), and Output (the required deliverables).

Any change that affects one of these constraints can seriously affect the ultimate delivery of the project. For instance, if the deadline is tightened, you will need more resources to deliver the same output. If the resources available are reduced (usually in the form of lost people), you will likely need more time to deliver the output. If the output requirements change (usually added functionality or features) you will need either more time or more resources.

Sometimes, changes to a project occur in one major hit a significant new feature or function is required. Usually, changes occur little by little, over the life of the project. These small changes, in and of themselves, are not significant. However, taken together, they have a serious impact on the project.

For purposes of self-protection as well as for good records, you should document every change to the project. There are several things you should make note of:

Who is requesting that the change be made?

What exactly, and in detail are they asking to be changed?

What, in their opinion, is the priority of making the change? How important is it?

What, in YOUR opinion, is the impact that making the change is likely to have on the project?

What exactly, and in detail is going to happen to the existing project plans as a result of the change? What additional resources will be required? How much additional time will be required? Will it affect either the timing or the content of the delivery? Who needs to be notified about the change? Who is authorizing the change?

That last one, "Who is authorizing the change?" is the key. If you are in a position to authorize the additional resources, the additional time required, or the change in output, great. You can do it. If, on the other hand, you are not in a position to authorize it, your job is to get the information into the hands of whoever is in a position to authorize it. Write it up and get a signature.

I'm afraid I might not be able to deliver every piece of my project by the deadline, how can I get agreement on the priority of parts of the project?

It is not uncommon for a project to simply be too big or too complex to be delivered in its entirety by the deadline. In these cases, there is usually a way to deliver some (or most) of the output by the deadline and continue to provide the remainder once the initial pieces have been handed off. The problem is deciding which pieces are the most critical or most useful? You need to decide, where to put the limited resources for the greatest impact in the shortest time.

A Priority Matrix can be a useful tool for this. A Priority Matrix is a simple two-axis matrix in which the key features or functions of the project deliverable are listed and prioritize according to their importance.

List the features or functions down the left of the matrix. Limit the list to five or fewer items. Trying to prioritize every feature or function of a project is not only much more difficult, it is usually unnecessary. For most projects, there are a few critical features that must be included. All the others are simply enhancements or supporting pieces for these key items. Determine the five top features or functions. Create a set of five columns to the right of the features list. Head the columns 1, 2, 3, 4 and 5 respectively.

Prioritize the list with only one feature or function at each priority level. This is the key to this tool. Each item must have its own position in the priority structure. There cannot be two number 1 priorities. Once all the items have been prioritized, circulate the Priority Matrix among the stakeholders and customers of the project. You can add a list for their sign off if desired. Disagreements about the order of priority should be addressed and the final list approved by everyone.

The goal is to gain general agreement as to which features should take priority over which other features if all work cannot be completed by the deadline. The finalized

Priority Matrix becomes a tool for decision-making about which parts to focus on as the project unfolds.

What if your project is late because some managers fail to cooperate?

Without encouraging "career-limiting behavior" I can only make suggestions about what you as a project manager can do the next time to cover your own posterior. (None of these suggestions address the behavior of the managers since this appears to be outside the scope of your authority and control as the project manager. Without the organizational authority to affect their behavior, there is little point in trying to impact them. You probably won't succeed and it may have serious repercussions for you personally.)

Don't take the situation too personally. There is a real danger in getting too emotionally "invested" in your projects. You should realize that anything that negatively impacts the project - whether you can do anything about it or not - takes on a sinister aspect. You must accept that there will always be things that will impact your projects over which you have little or no control. When these occur, you can only react as best you can with the good of the project as your primary aim.

Make sure that the impact of withheld information, resources, work output, etc., is clear. A good change-control process is helpful here. It allows you to describe the change being made as well as the impact of that change on the project. Document this and be sure that everyone who should be informed is informed.

Realize that shifting priorities are a fact of organizational life. Priorities change constantly in any organization. New challenges arise that require a response from the organization and that response requires that resources be moved from one activity to another. In most instances, those resources come from projects that are as a result of the shift in emphasis no longer as important as they were yesterday. Unfortunately, many times, the project manager is not told the reason they've lost their resources.

Document what happens. Always document the things that happen during a project. Never assume that "everyone knows why this happened." They may, but, then again, they may not, or they may have a completely different understanding of the situation. Try to document the occurrence in a factual way. Try to avoid accusations and conjecture about "why" the thing happened. Document what happened and the impact it had on the project. A good change-control system can help with this. This documentation should become part of the total project documentation and can be included as part of the final project report. A good, carefully worded narrative about why the project was delivered late can reference this documentation.

Use your sponsor. A sponsor is someone in a position of authority in the organization who has agreed to act on behalf of you and the project when an issue is outside your scope of authority and control. If you do not normally identify a sponsor for your projects, seriously consider doing so. One of the functions of a sponsor is to intercede in situations like the one you described. When a conflict occurs, the sponsor should be informed and asked for both advice and for direct assistance in resolving the conflict. The most common conflicts are over needed resources but they can also occur over issues of cooperation and delivery of work or information.

How can I get support from managers who don't have a direct stake in my project but from whom I need resources, like some of their people?

The issue of support from people outside your direct control is a common one. Most projects are staffed by people from several areas of the organization, rarely do they report (in the traditional sense) to the project manager. They are, in effect, "borrowed" resources and they're usually "borrowed" from someone who already had plans for them.

One way to build support is to carefully connect the goal of your project to larger goals in the organization. You should be able to show how achieving your project goal will further the goals of your own area. Try to develop the same connection between the project goal and the goals of those managers from whom you need support.

The farther up the organizational chain you can draw this line, the better. Start with your work group. Move on to your department, your division, etc... Try to pick up the necessary managers along the way.

Depending on the project, you might try looking for goals that involve such things as interdepartmental cooperation; customer service improvements; productivity improvements; divisional revenue enhancements; new product introductions, etc... Using higher-level, longer-term goals as the basis for your request can frequently overcome short-term objections.

This is the first in a regular column of tips, tricks and, hopefully, insights into things that work (and some that don't) in project management. As a project manager for more than twenty-five years, I've pretty well "been there and done that."

Negotiating for the people you really need rather than the ones you were assigned.

Project Planning Checklist

Scan this project planning checklist for possible ideas to be considered in your projects. It is especially good when you're just brainstorming, and giving yourself permission to capture any and all ideas that pop into your head.

Resources

Whose input do we need?

Whose input could we use?

Has anything like this been done before?

What mistakes can we learn from?

What successes can we learn from?

What resources do we have?

What resources might we need?

Executive issues

How does this relate to the strategic plan?

How does it relate to other priorities, directions, goals?

How will this affect our competitive position?

Administration

Who's accountable for this project's success?

Lines of communication

Methods of reporting

What structures do we need?

What planning is still likely to be required?

What re-grouping will we need? How often?

What people do we need?

Current staffing?

Hiring?

Subcontractors?

Consultants?

How do we get involvement?

What skills are required?

Who needs to know how to do what?

What training do we need?

How do we get it?

What other communication do we need?

Who needs to be informed as we go along?

What policies/procedures affected? What needed?

What about morale? Fun?

Staffing?

Finance

What will this cost?

How do we get it?

What might affect the cost?

Might we need additional funds?

What are the potential payoffs (\$)?

Who signs the checks?

Operations

What is the timing?

Hard deadlines?

What might affect timing?

Who's going to do the work?

How do we ensure complete delivery?

Quality

How will we monitor our progress?

How will we know if we're on course?

What data do we need, when?

What reports, to whom, when?

Politics

Whose buy-in do you need?

How can you get it?

Stakeholders, Considerations?

Board
Stockholders
Employees
Suppliers
Customers
Community

Legal
Issues?
Regulations?

Space/Facilities/Equipment
What requires room?
How do you get it?
What tools do we need? When?
Phones
Computers

Research
What might you need to know?

Public Relations
Is there value in others knowing about this?
How do we do that?

Risks
What could happen?
Could we handle it?

Creative thinking...
Who would have concern about the success of this project?
What would they say, ask, or input, that you haven't yet?
What's the worst idea you can imagine, about doing this project?
(What is therefore the best idea, which is its opposite?)
What is the most outrageous thing you can think of, about this project?
How would a 12-year-old kid relate to this project?
What would make this project particularly unique?
What the worst that could happen?
How could we deal with that?
What's the best that could happen?
Are we ready to deal with that?
How do we feel about this project?

Ten Steps to Project Success

Project Charter Review

Gain an understanding of the scope of the project, obtain background on the business unit and project type being presented, and establish the most efficient and cost-effective manner for meeting the expectations of the project sponsor.

1. Identify Project Organization: & Team Requirements
2. Identify requirements as well as purpose for an executive steering committee, oversight board, or advisory team in addition to the personnel requirements for composition of project teams from both the business unit and the IT organization.
3. Conduct A Collaborative Project Team Kickoff Meeting
The kickoff meeting will establish the baseline for the project activities to take place. Issues regarding project scope should be addressed and gain group consensus. Individual roles and accountabilities will be defined for all project stakeholders. Project auditing measures will be determined, and criteria for success will be agreed upon.
4. Analyze Business Requirements That Are Expected In the Project Deliverable
Review all project-related documents, tools, findings, and recommendations and map them to the project plan, tasks and major milestones.
5. Audit Project Tasks & Resource Requirements for Each Project Activity
6. Create a review process and evaluation of team member's workload, proactively identifying and resolving resource constraints or issues.
7. Review & Monitor Project Goals, Objectives and Predicted Risks Through Project Life-Cycle Events
8. Always keep aware of the project environment and any impacts they may alter the original goals or stakeholders expectations.
9. Establish Project Business Rules
Practice the 3 C's cooperation; coordination and communication or your project is destined to fail.
10. Establish and Practice Change Management Principles & Processes

Realize project plans are roadmaps and often detours come about. Be prepared for them before they happen.

Gain Group Consensus by All Stakeholders before Making a Decision
Remember projects are comprised of teams all with a voice in the outcome.

Live up to the label - P.R.O.J.E.C.T

P Planned

R Rational

O Objectives &

J Justified

E Expectations

C Coordinated &

T Team Driven

<http://www.giglmon.net>