

Project Management Best Practices



The True Fundamentals of Project Management

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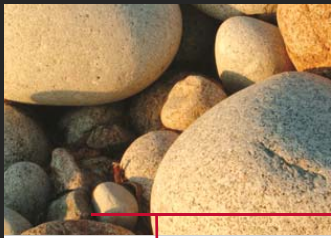


First, Let's Clear a Couple Things Up

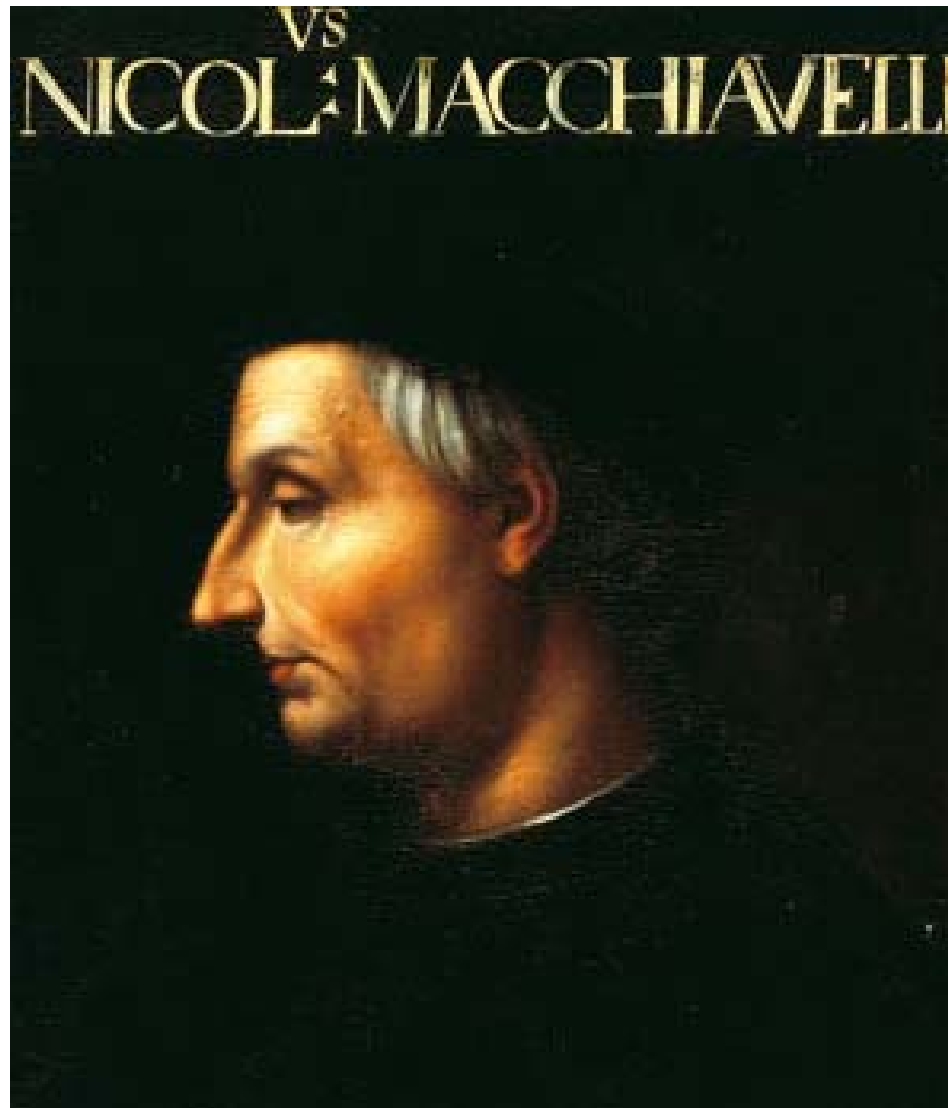


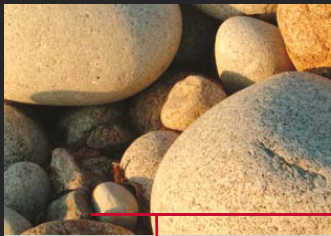
1. Smoking and drinking beer doesn't make a kid an adult
2. Training alone doesn't make a person a PM

Being a good project manager takes diligence, practice, and dedication to the profession



The More I Pondered, The More My Thinking Seemed Like Machiavelli

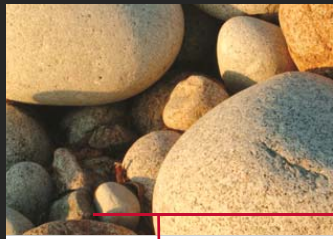




Why Do We Use So Many Project Management Tools?

You Do What You Need To Do to Meet the Project Objectives

You use the tools, methods and approaches that bring the highest chance of successfully performing a project that meets the needs of the project originator or sponsor and satisfies the project stakeholders



Purpose, Organization of the Presentation

Purpose: establish a set of pure fundamentals for project management that will drive a project manager or team toward success.

Fundamentals:

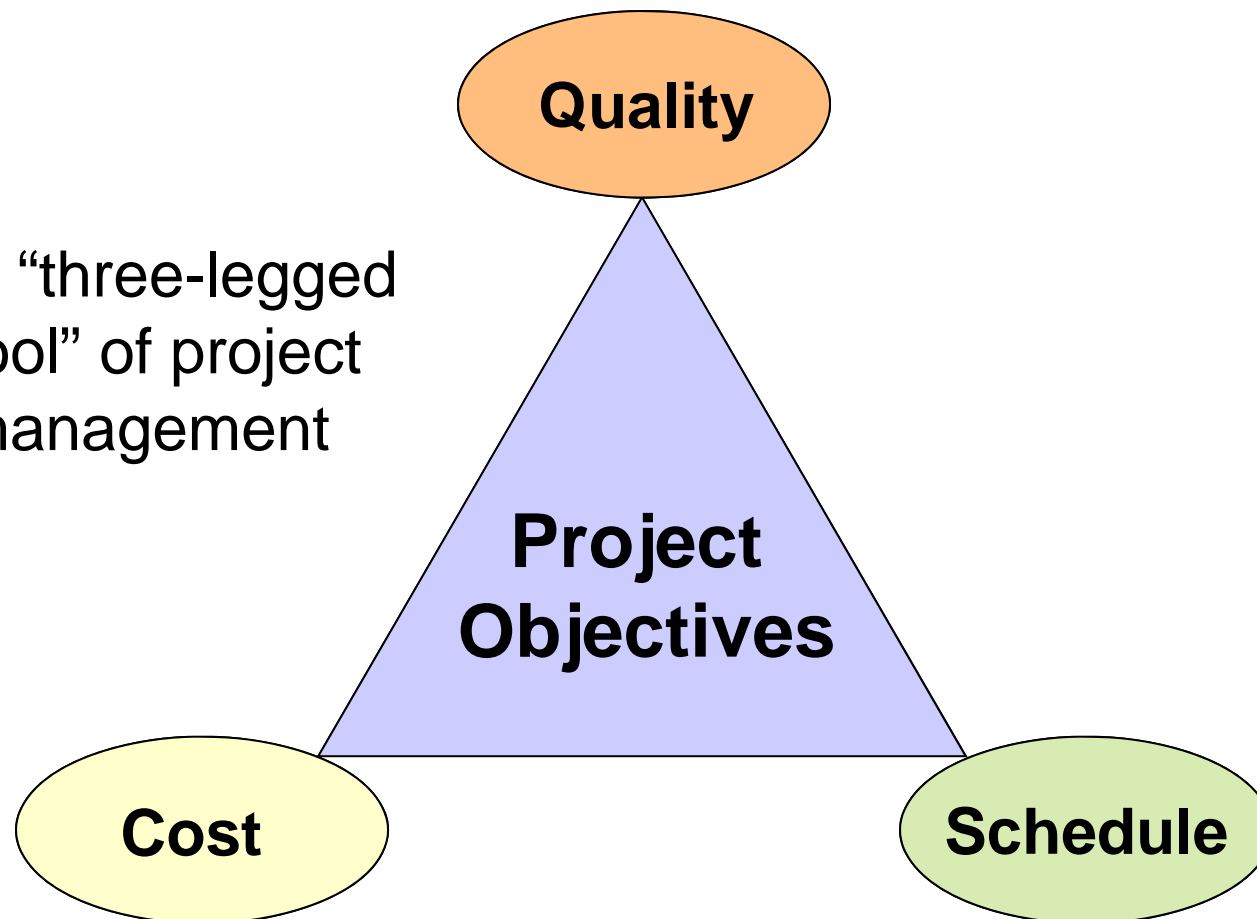
1. Be objectives-oriented
2. Be disciplined
3. Know your stakeholders and their expectations, and communicate ruthlessly
4. Have a plan (but be ready to adapt)
5. Learn and improve

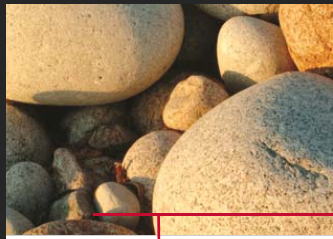
FUNDAMENTAL 1:
BE OBJECTIVES-ORIENTED



The Classic Set of Core Project Objectives Looks Like This

The “three-legged stool” of project management



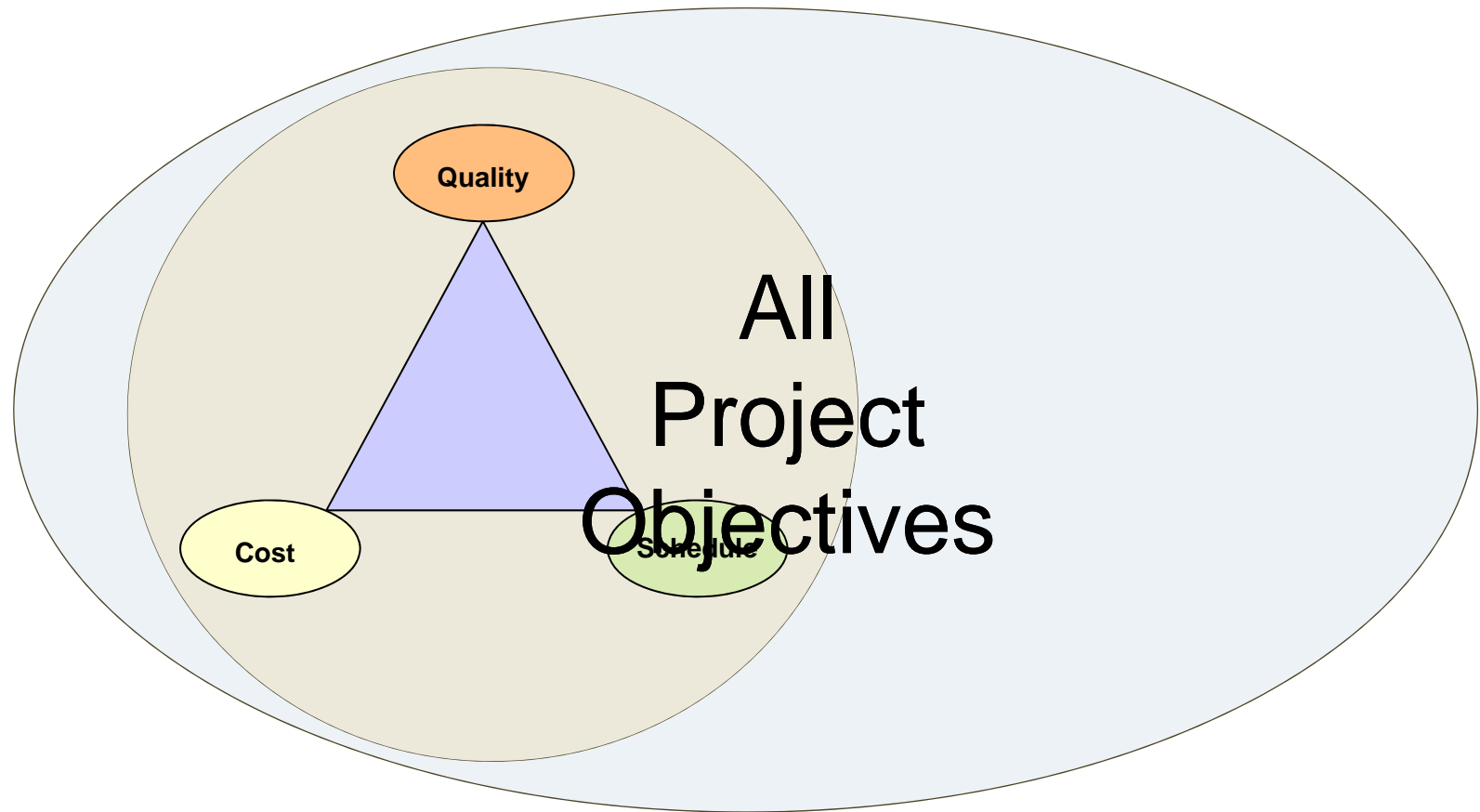


Is The Three-Legged Stool A Few Legs Short? I Think So

- Why? You can deliver a project under budget, on schedule, and with good quality and have miserable stakeholders.
- Examples?
 - Key client contact ticked with communication
 - Client accountant unhappy with invoices
 - Project team abused, beaten down



The Three-Legged Stool is a Subset of the Full Set of Project Objectives



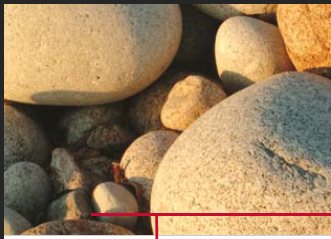


Objectives? Here's One: How Do You Want the Project Team to Operate?



- or -





Objectives? Here's Another: How Do You Want the Project to End?



- or -

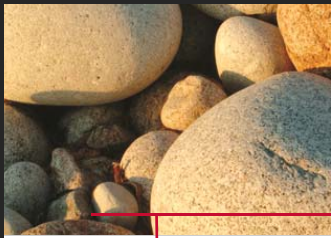




What are Other Objectives Outside Cost/Quality/Schedule?

Other?

- Build a capability? Develop people or systems?
- Have satisfied internal and external stakeholders?
- Build networks? Your reputation?
- And many other possibilities



To Come Up With Objectives: Look Backward Forward

2. Then think “What do I need to do now, at the beginning, and throughout the project, to get the ending I am hoping for?”



1. Pretend you are at the end of the project. How do you want it to end? How do you want it to go?



Fundamental 1: Be Objectives-Oriented

1. From the very beginning of the project, think broadly about your objectives
2. Cost/Schedule/Quality are given – they are critical project objectives. But...
3. There will always be more objectives than just Cost/Schedule/Quality
4. To help thinking about the objectives, imagine you are at the end and looking back. How will you view success?



What if You Are Not a PM? You Should Still Be Objectives-Oriented!

- Having objectives is still very important even if you are not a PM.
- Without objectives a task is just a task. The only objective may be completing it.
- What other objectives can you have?
 - Show your value to a PM?
 - Develop a capability?
 - Build a network?There are lots.

FUNDAMENTAL 2:
BE DISCIPLINED

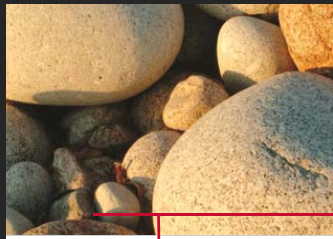
First, Let's Be Clear About What "Be Disciplined" Means



One type of
"Be Disciplined"

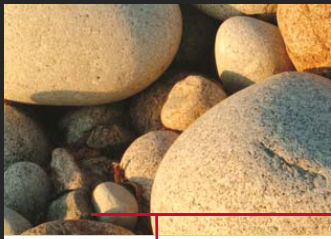


Another type of
"Be Disciplined"



Great Project Managers are Disciplined. They Tend To...

- Sweat the details
- Be ritualistic, following the same (occasionally) boring routines
- Place a very high priority on planning
- Communicate actively using multiple channels
- Avoid making assumptions about what people know and cross-check it



Sometimes the “Little Things” are Big Things. Things I Always Do...

Make sure we are clear on the problem we have to solve. Ask “How do we best make this decision?” when making one.

Have an agenda and meeting objectives for all meetings. Follow up with timely meeting minutes.

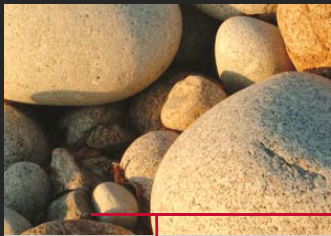
After a big meeting ask: “Was this meeting what you expected and did it meet your needs? Is there anything we could have done to make it better?”

Check with the client at our first meeting and routinely afterward “How are we doing, are we meeting your expectations?”

Ask my client “How do we address change?” when planning.

Have a 15-minute project meeting each week.

Integrate schedule planning and budgeting, and think about risks.



Another Example: Use Redundant Communication to Improve Delivery

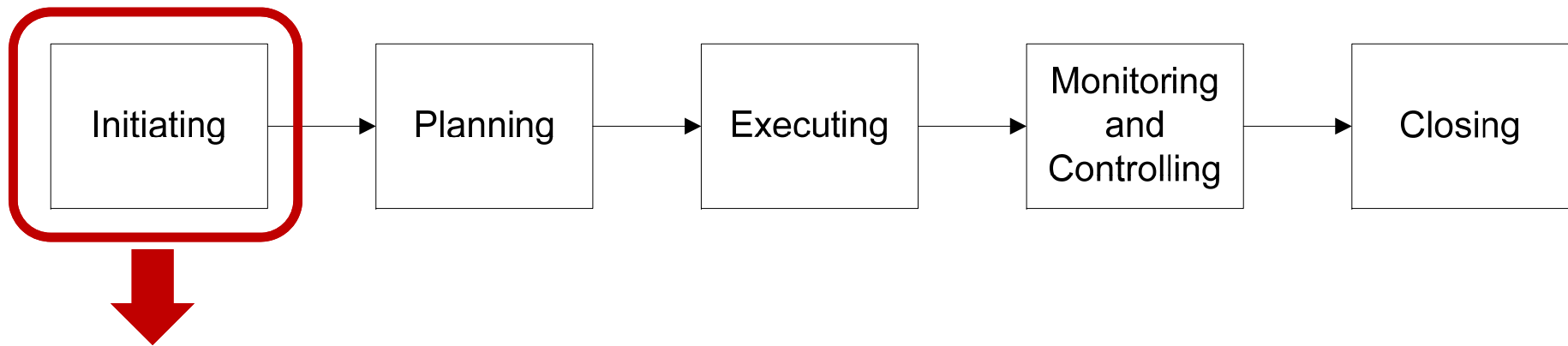
“To get employees to do something, managers need to ask them at least twice....Managers who were deliberately redundant moved their projects forward faster and more smoothly.

“Researchers found that managers who were particularly effective planned their redundant communications, with very little time between their first and second messages.”

“Effective Managers Say the Same Thing Twice (or More)”,
Harvard Business Review, May 2011



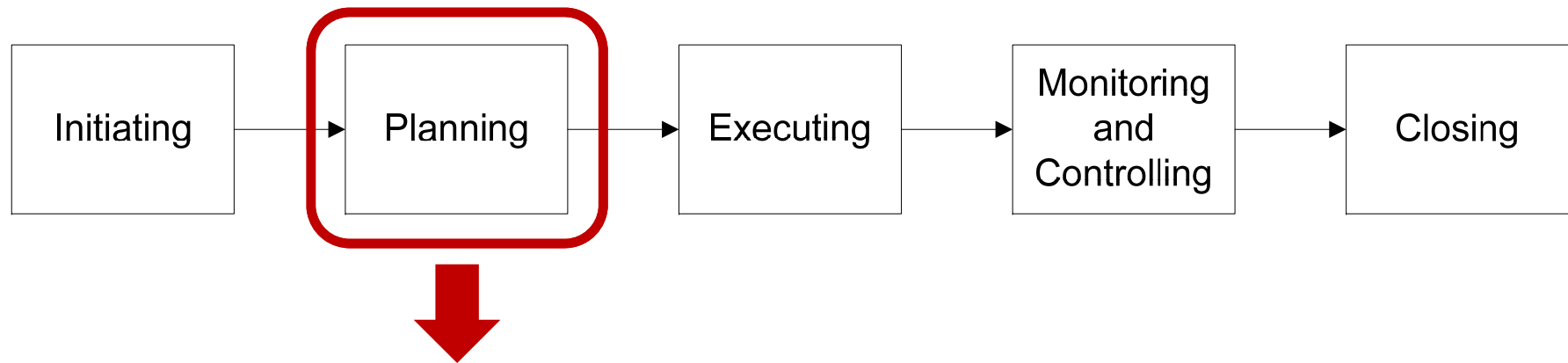
Discipline is Critical Throughout the Entire Project



- Ask: “What is the project?” Poor framing is one of the biggest causes of problems.
- Ask: “Who are the stakeholders? How will they define success on the project?”
- Establish norms for meetings, communication



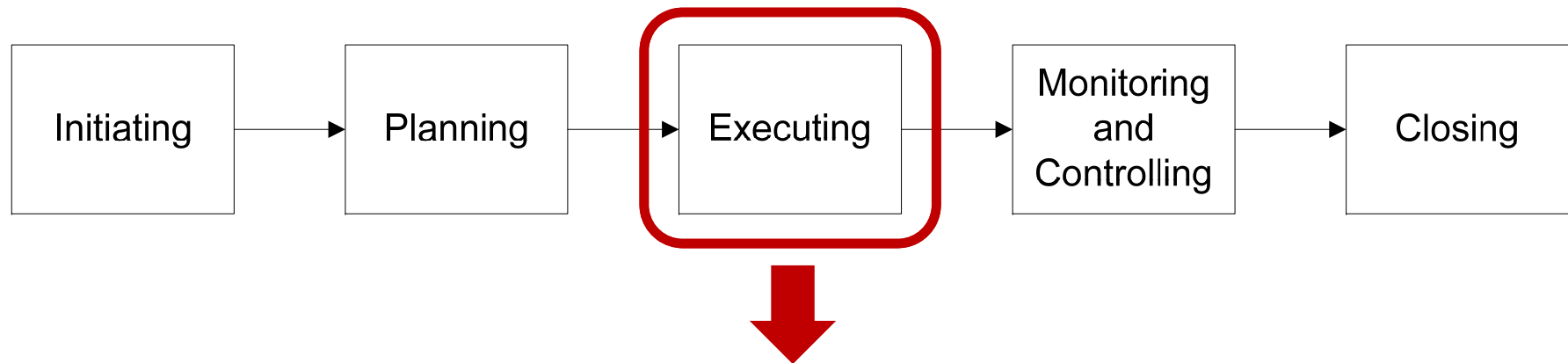
Discipline is Critical Throughout the Entire Project



- First ask: “What is the best way to plan?”
- Evaluate the results of your previous plans.
- Define desired outcomes, systems, product.
- Use a careful planning process, document it.



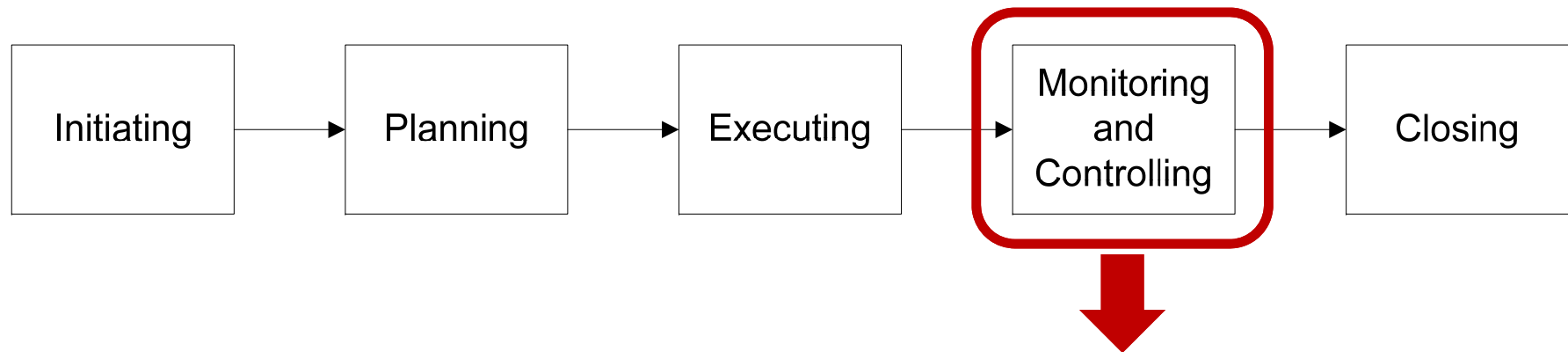
Discipline is Critical Throughout the Entire Project



- Start checking that performance is acceptable as soon as you start the project. Make corrections to keep things on-track.
- Get ahead of things.
- Document carefully...meetings, etc.



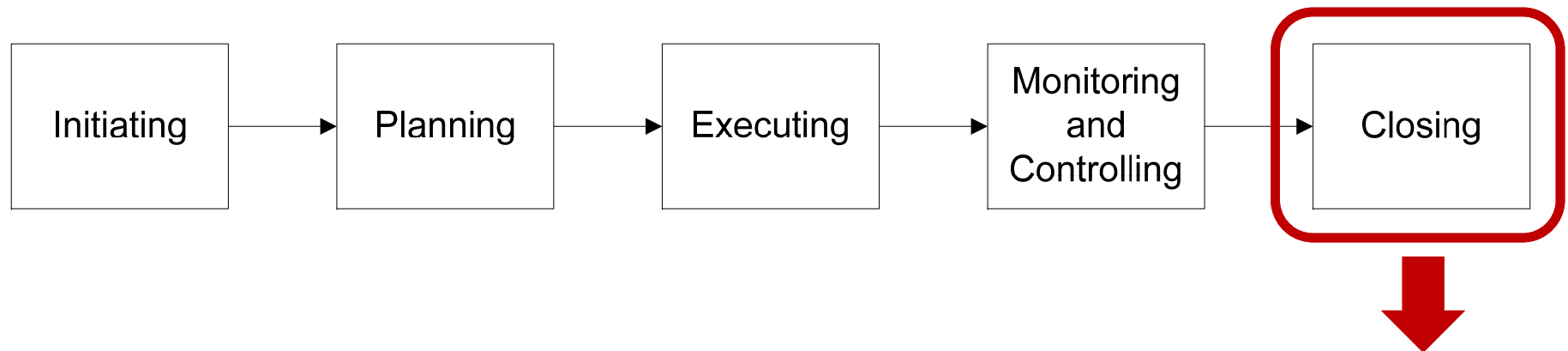
Discipline is Critical Throughout the Entire Project



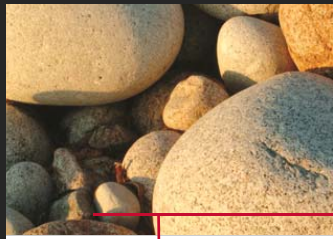
- Establish clear monitoring and controlling benchmarks that everybody understands.
- Used earned value management to improve understanding and provide early control.
- Be ritualistic in your monitoring and reporting – the weekly 15-minute status meeting is good.



Discipline is Critical Throughout the Entire Project



- Close the files early – don't leave a mess.
- Check all feedback loops for satisfaction.
- Do a “post-mortem” at the end or at phase endings – find ways to improve.



Fundamental 2: Be Disciplined

1. Discipline is a key part of being a successful project manager
2. Sweat the details
3. Select best practices and use them
4. Be ritualistic
5. Apply discipline throughout the project life-cycle



What if You Are Not a PM? Be Disciplined!

- (No, this doesn't mean "get spanked")
- Treat the PM like a client.
- Put yourself in the PM's place. Figure out how you can make their life better.
- Plan your work – on paper, with a schedule and budget – and track yourself.
- Communicate **VERY** actively with the PM on your status and plans. Keep them posted.

**FUNDAMENTAL 3:
KNOW YOUR STAKEHOLDERS AND
THEIR EXPECTATIONS...AND
COMMUNICATE RUTHLESSLY**

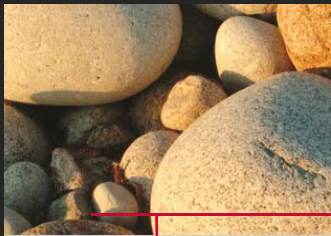


What is Your Objective for Your Stakeholder's Feelings?



- or -



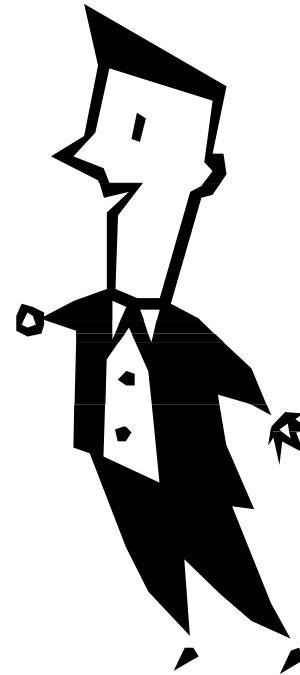


We Tend to Have a Simple View of the Project Client or Sponsor

Project Manager



Client or
Sponsor





But Sometimes There are Multiple Sponsors, Not Always Aligned

You?

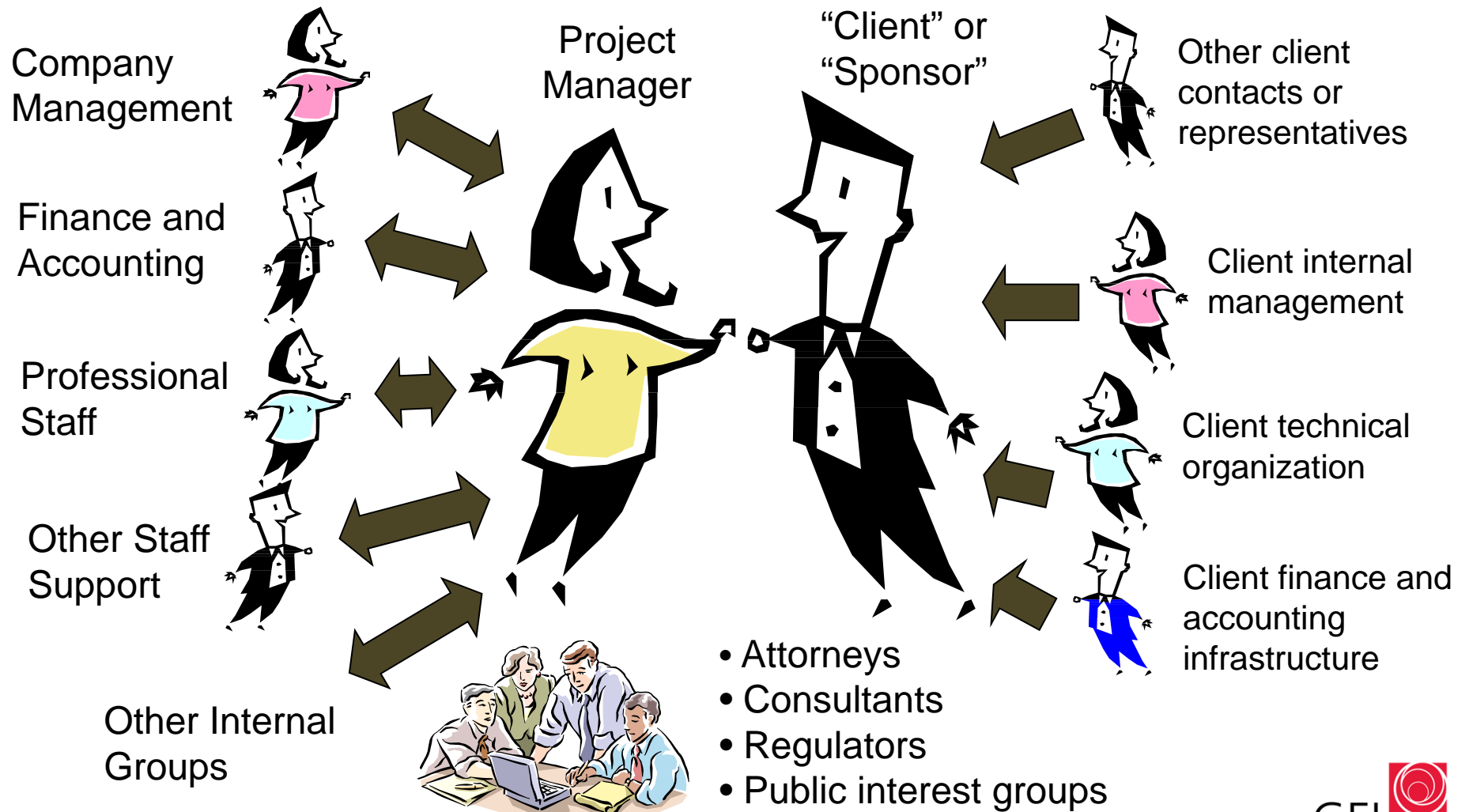


Dream Project Sponsors
(Thoroughly Aligned)



More Likely: Project Sponsors
(Thoroughly Misaligned)

And Who We All Serve is Never Simple



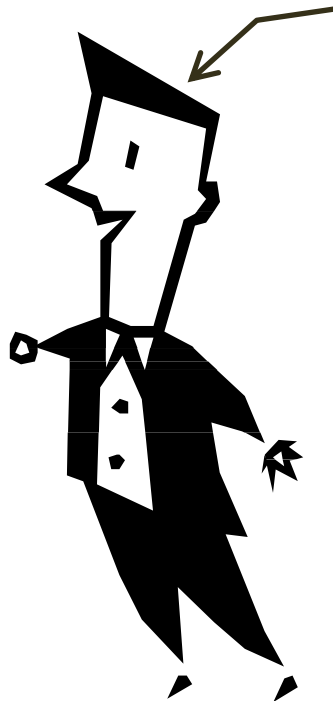


All The Project Stakeholders Have Expectations

Project
Manager



Stakeholder

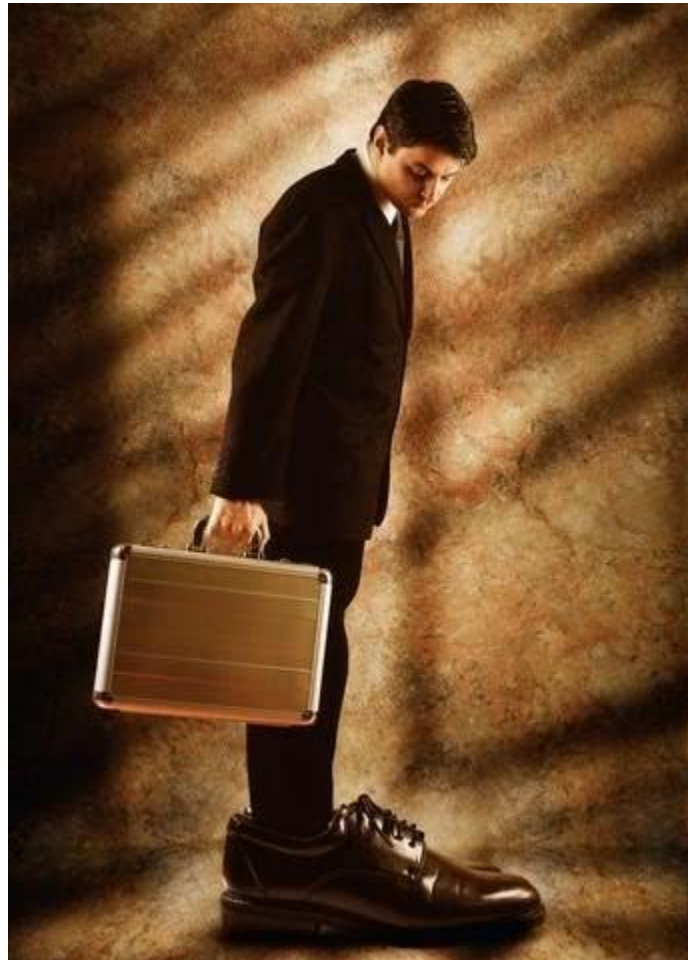


Common Stakeholder Expectations:

- Their involvement in planning, decisions
- Product quality, timeliness
- Your...
 - Communication
 - Availability, responsiveness
 - Problem handling
 - Ethics, truthfulness
- Lots of others



To Help Think About Them, Put Yourself In Your Stakeholder's Shoes



- Think about the life of your stakeholders person – their responsibilities, roles, concerns – and imagine yourself in their shoes.
- Think about how you can help them, make them more successful, and look good. Then do those things.



How to Communicate Well With Stakeholders?



Andy Crowe, Alpha Project Managers: What the Top 2% Know That Everyone Else Does Not, 2006

Survey of over 5000 PMs and their stakeholders

1. Establish clear expectations with stakeholders about what you will communicate and when and keep to the agreed schedule rigidly.
2. Second, write only what your stakeholders want and need to know. Keep it short, keep it relevant.



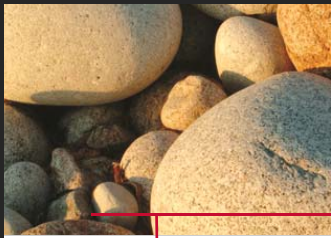
How to Communicate Well With Stakeholders?

3. Don't be afraid to communicate both good and bad news in a timely manner.
4. Finally, write clearly, concisely, and correctly (grammar, spelling, etc.)

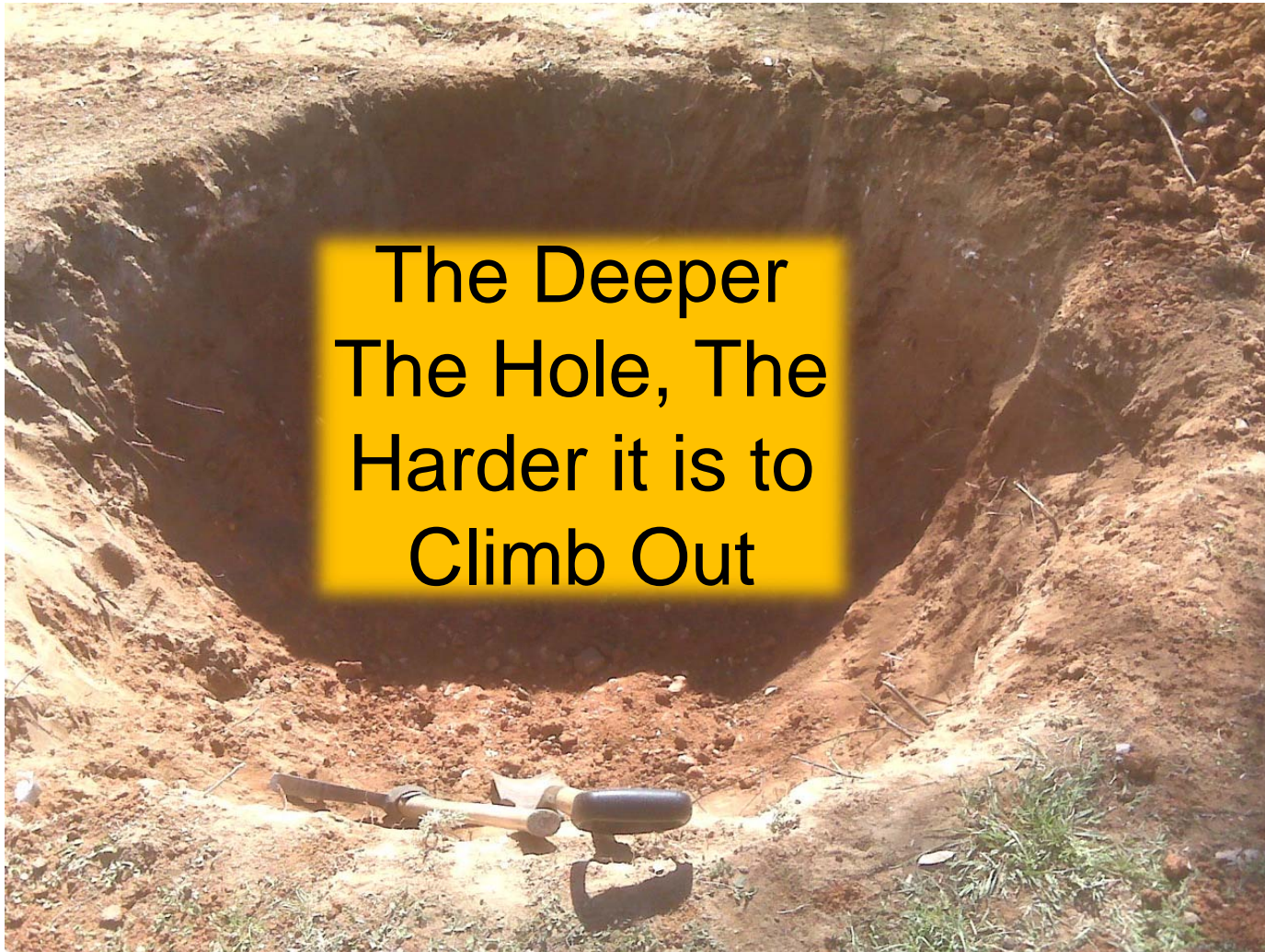


Andy Crowe, Alpha Project Managers: What the Top 2% Know That Everyone Else Does Not, 2006

Survey of over 5000 PMs and their stakeholders



And Remember This Simple Message....





Fundamental 3: Know Your Stakeholders and Communicate

1. We have MANY internal and external stakeholders on projects, with diverse expectations.
2. Knowing your stakeholders and satisfying their expectations is one of your most important responsibilities.
3. Communication is critical and almost never done well enough. Be proactive, be disciplined, and focus it.

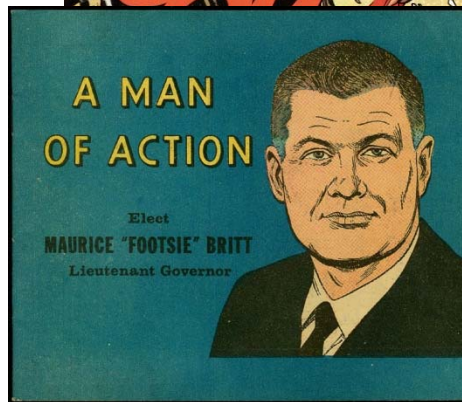


What if You Are Not a PM? Know Your PM and Communicate!

- Put yourself in the shoes of the PM. Observe them. Not all are alike.
- Regular communication back to the PM is REALLY critical and doesn't have to take much time. Without information the PM has to fill in gaps and is left wondering on status and when things will be received, and (can dramatically) add to their stress.
- Try to take the burden off them.

FUNDAMENTAL 4:
HAVE A PLAN
(BUT BE READY TO ADAPT)

Our Culture is Not Big on Planning



MAN OF ACTION

PHOTOGRAPHS BY DAVID WALZES
STYLING PHIL LEE AND DAVID WALZES
HAIR AND MAKEUP VANESSA PEREZ AND NORSHEDA KAHMAN
MORE: CHARLIE WOOD @ LA MODELS





Maybe That Explains The Typical Low Rate of Project Success

United States Government Accountability Office Review of federally funded technology projects found “413 of 840 (**49%**) of federally funded IT **projects are either poorly planned, poorly performing or both**”.

“Price Waterhouse Coopers survey of 200 global companies found that **over half of all projects fail, and only a meager 2.5%** of corporations’ projects consistently **meet their targets** for scope, time, and cost.”

“KPMG survey of Project Management practices at 100 businesses across a broad cross section of industries shows **50%** of respondents indicated that their **projects failed** to consistently achieve what they set out to achieve!”

IBM survey of 1,500 change management executives in the success / failure rates of “change” projects finds; “**only 40%** of projects **met** schedule, budget and quality **goals**”



Why is Project Performance So Poor? Overoptimism For One

Research from Noble Prize Winner Daniel Kahneman and his associate Amos Tversky Shows....

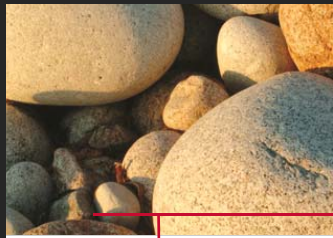


Daniel Kahneman and Amos Tversky

“Overly optimistic forecasts of the outcomes of projects are found everywhere.”

“The term *planning fallacy* describes plans and forecasts that...

- Are unrealistically close to best-case scenarios
- Could be improved by consulting the statistics of similar cases”



Another Cause: Not Sticking to a Realistic Plan (and Dubious Intent?)

“Contractors of kitchen renovations and weapon systems readily admit (though not to their clients) that they routinely make most of their profit on additions to the regular plan....”

“[Customers] end up paying much more than they would if they had made a realistic plan and stuck to it.”

Daniel Kahneman, Thinking, Fast and Slow, 2012



Why Plan Aggressively?

Simple. It's cheaper to fail on paper than in real life.



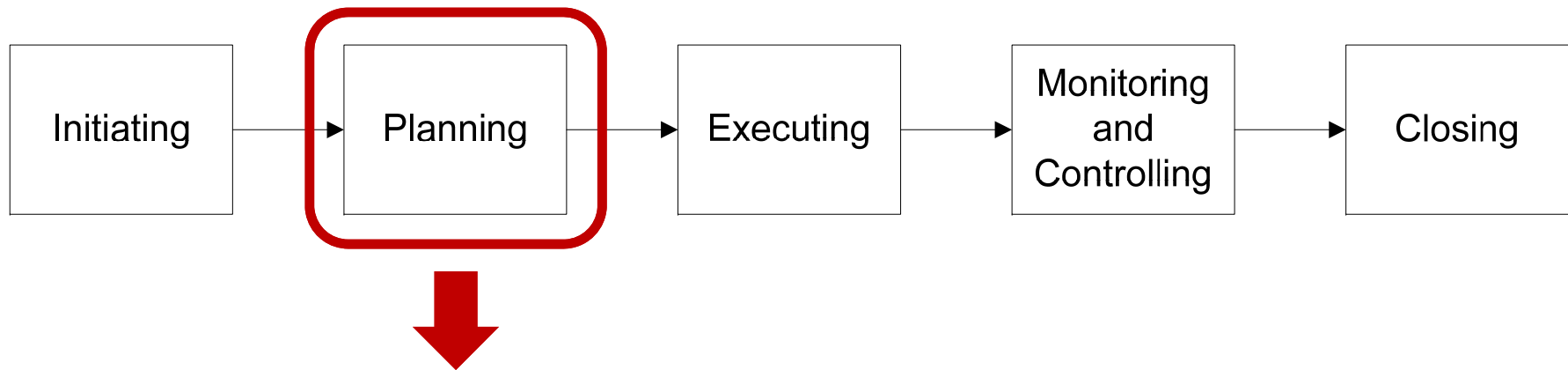
Cheap



Expensive

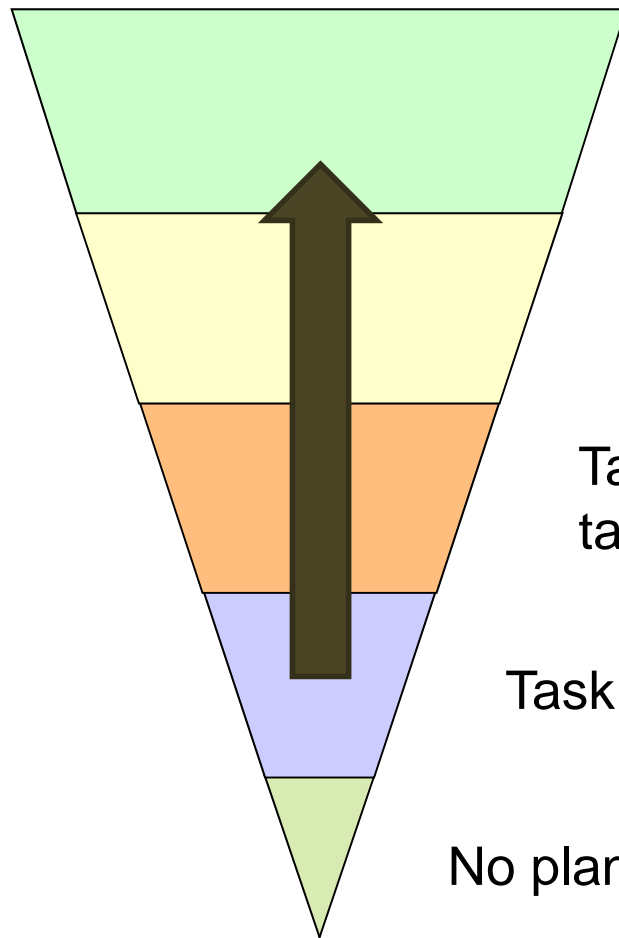


So Planning is Important. How Do You Do it? Remember This Slide?



- First ask: “What is the best way to plan?”.
- Evaluate the results of your previous plans.
- Define desired outcomes, systems, product.
- Use a careful planning process, document it.

There is a Hierarchy of Basic Planning Products (and Processes)



Linked task list with durations, resources, budgets, risk analysis

Linked task list with durations, resource estimates, task budgets

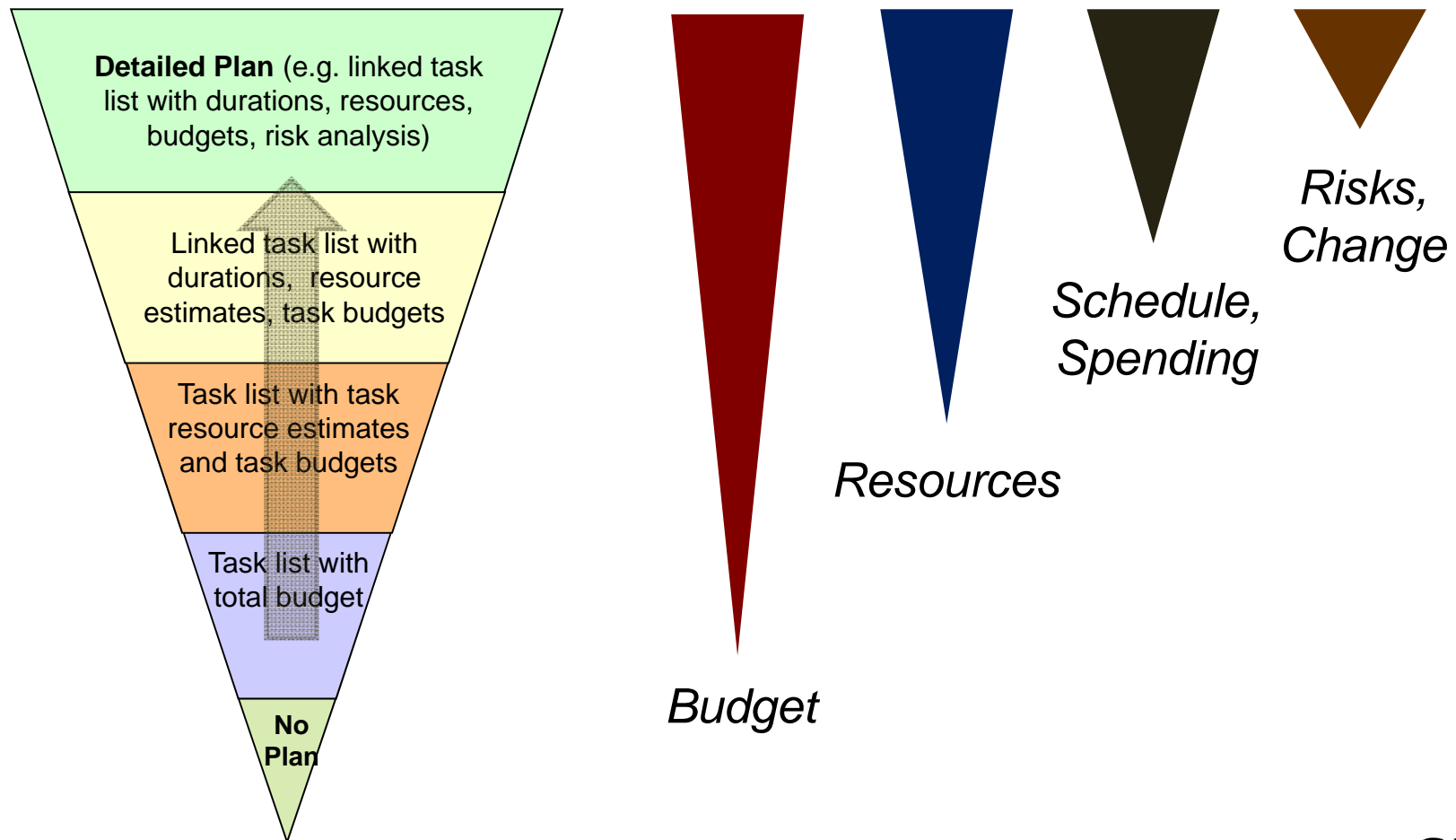
Task list with task resource estimates and task budgets (floating schedule?)

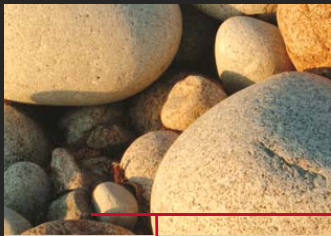
Task list with total budget

No plan

Methods Provide Various Levels of Information and Insight

Level of Information Obtained from Planning Process





A Well-Developed Plan Will Help You Stay on Track...and Adapt

Having a good base plan allows you to see where you are on or off-track and make timely corrections.

9	WBS	Tasks	Task Lead	Start	End	Duration (Days)	% Complete	Working Days	Days Complete	Days Remaining
10	1	Task Category 1	John	1/3/09	3/18/09	75	70%	53	38	15
11	1.1	Sub Tasklevel 2		1/3/09	1/20/09	18	100%	12	18	0
12	1.2	Sub Tasklevel 2		1/21/09	2/19/09	30	95%	22	28	2
13	1.2.1	Sub Tasklevel 3		1/22/09	1/31/09	10	20%	7	2	5
14	1.2.2	Sub Tasklevel 3		1/23/09	2/01/09	10	20%	6	2	4
15	1.3	Sub Tasklevel 2		1/22/09	2/09/09	19	95%	13	18	1
16	1.4	Sub Tasklevel 2		2/10/09	3/18/09	37	50%	27	18	9
17	2	Task Category 2	Jane	3/01/09	5/12/09	73	13%	52	9	43
18	2.1	Sub Tasklevel 2		3/01/09	3/17/09	17	50%	12	8	9
19	2.2	Sub Tasklevel 2		3/01/09	3/17/09	17	30%	12	5	11
20	2.3	Sub Tasklevel 2		3/18/09	4/25/09	39	0%	28	0	38
21	2.4	Sub Tasklevel 2		4/15/09	5/12/09	28	0%	20	0	28
22	3	Task Category 3	Bill	4/25/09	8/02/09	100	0%	70	0	100
23	3.1	Sub Tasklevel 2		4/25/09	5/11/09	17	0%	11	0	17
24	3.2	Sub Tasklevel 2		5/1/2009	5/28/09	17	0%	13	0	17
25	3.3	Sub Tasklevel 2		5/29/09	7/05/09	38	0%	26	0	38
26	3.4	Sub Tasklevel 2		7/05/09	8/02/09	29	0%	20	0	29
27	4	Task Category 4	Bill	4/25/09	8/02/09	100	0%	70	0	100
28	4.1	Sub Tasklevel 2		4/25/09	5/11/09	17	0%	11	0	17
29	4.2	Sub Tasklevel 2		5/1/2009	5/28/09	17	0%	13	0	17
30	4.3	Sub Tasklevel 2		5/29/09	7/05/09	38	0%	26	0	38
31	4.4	Sub Tasklevel 2		7/05/09	8/02/09	29	0%	20	0	29
32										



Risk management helps you anticipate and prevent issues, and also deal with them when necessary.



Fundamental 4: Have a Plan (But Be Ready to Adapt)

1. Planning is sorely undervalued, and project failures are very high.
2. Failure causes? Overoptimism, poor consideration of prior outcomes, not sticking to a plan, and poor intent.
3. Before you start planning, consider the past performance, situation, objectives.
4. Apply discipline once you start execution. Use your plan.

What if You Are Not a PM? Have a Plan (But Be Ready to Adapt)

My Best Project Management Lesson

Over 25 years ago I had an experience as a younger engineer that I frequently tell people that is the best single project management lesson of my life. I want to share it with you.

I started my consulting career in Corvallis at CH2M HILL. I was hired to do EPA Superfund project work. I thought I had been hired to do industrial process engineering.

One of the senior engineers in the office, John Graham, specialized in industrial wastewater work. I was dying to work with him. I finally got my chance when John won a project with Anaheim Citrus Products. He needed some process engineering help and I was available and interested in helping.

I met with John and he laid out what he wanted from me. As I was leaving to start working on his project he said "Brad, before you start, give me your plan."

I was a bit surprised since nobody had asked me to do that before. I told John I understood what I needed to do and he said "Okay; then it won't take you long to write it in a plan and give it to me. Show me what you are going to do, when you are going to do it, and how long it will take".

I went to my office to write my plan. I thought for awhile and finally realized I really wasn't quite sure specifically what I was going to do.

With my tail between my legs I went back to John and confessed I couldn't quite figure out the specifics of the plan. He smiled, said okay, then patiently worked with me until I had the basic ideas worked out. I was able to go back to my office and flush out the details. He and I then went back and forth a bit until we agreed on all the details. Once we were both happy I started the work, executed my plan, and kept John apprised of my status throughout the project. It all went very well.

I realized later that having John tell me, as a project team member, to write a plan for him for my work was the best single lesson I have ever had in project management. Here are some reasons why:

1. Developing my plan forced me to think specifically about what I needed to do, and working with John on the details helped me resolve with him the best course. That lowered my stress.
2. Once we were done planning, John, as the project manager, had the comfort of knowing that I had a plan that he understood. That lowered his stress.
3. I am sure my net work effort was less than it would have been if I had just run off and started working on John's project without some planning. The method was quite cost-effective.
4. In a short lesson John had basically mentored me how to plan a project and also how to effectively delegate work. And it was a safe environment for learning since my errors and inexperience were seen only by John.

So my suggestion is this: if you are a project manager delegating work, ask whoever is working for you to provide you with their plan. If you are being delegated to, offer to the PM to develop a plan and get agreement before you start. Regardless who initiates the plan, neither of you will regret it.



Me, from my monthly LINKS article to Parametrix, July 2010

**FUNDAMENTAL 5:
LEARN AND IMPROVE**



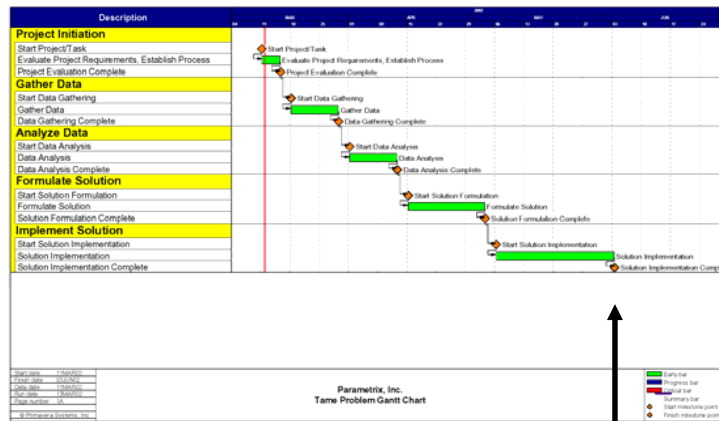
Why Learn and Improve Your Skills as a Project Manager?

“The project managers who are truly able to deliver real value, however, are few and far between, and project managers who can consistently manage a project and the process of delivery are scarce indeed.

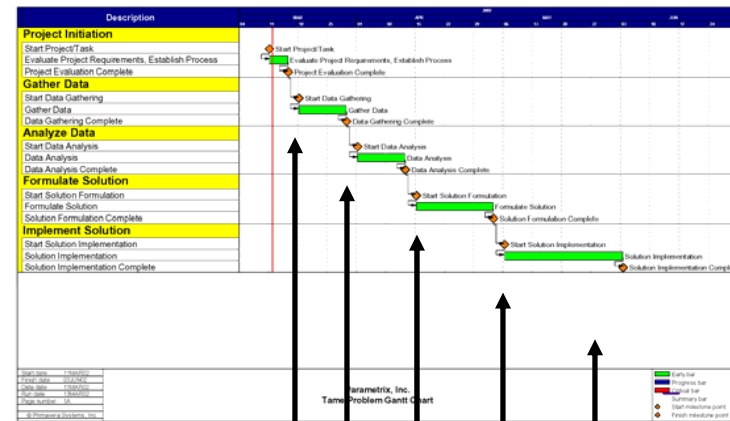
“Projects generate results, and project managers who can deliver these results typically rise quickly through their organization.”

Andy Crowe, Alpha Project Managers: What the Top 2% Know That Everyone Else Does Not, 2006

Constant Learning is Better Than Big End-of-Project Learning

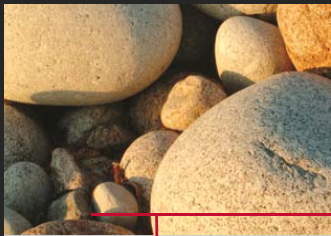


Single project
“Post-Mortem”



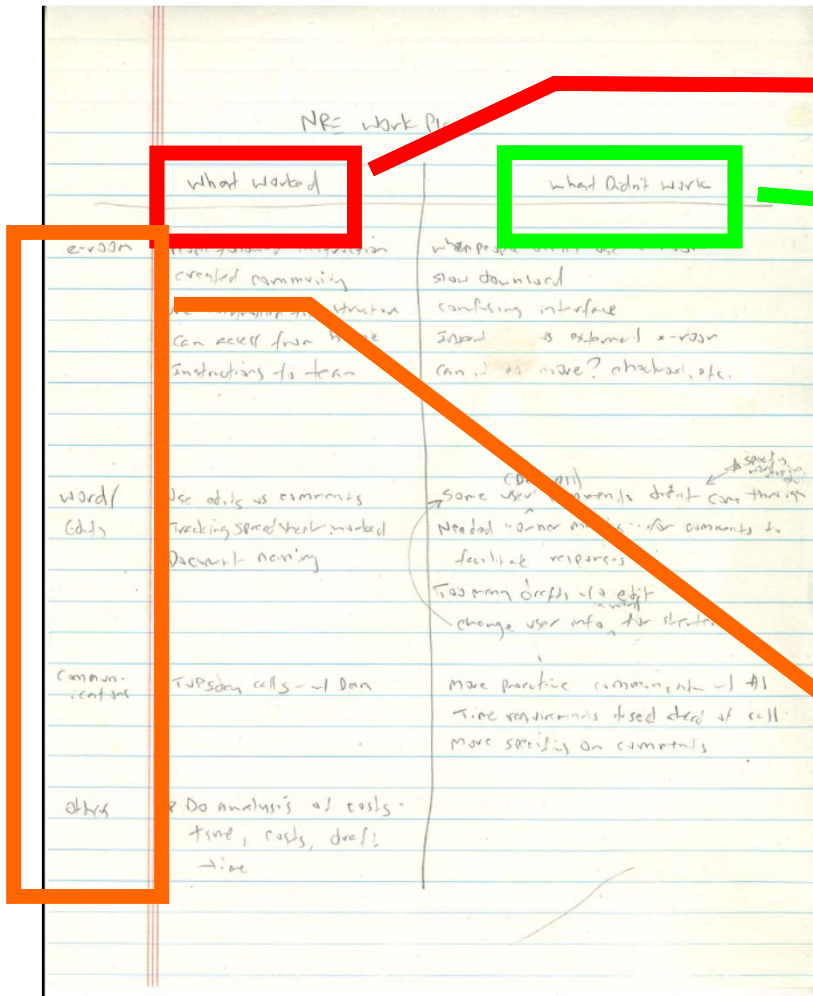
Multiple project lesson-learned
reviews

- Post-mortems almost never happen – people move on
- Small learning events bring improvement and immediate checks on approach, also better delivery



Project Lessons Learned Exercises Don't Have to be Hard

Real Project Review Meeting Notes



What worked?

What didn't work?

Topics



Even if You Are Not a PM You Can Learn and Improve!

- Every day and every task provides and opportunity for learning and improvement.
- Apply the fundamentals of being objective-oriented, being disciplined, understanding and communicating with your stakeholders, planning and adapting, and constant learning.
- Become part of the project management community. Advance your skills.

SUMMARY



There Are Five Fundamentals to Project Management

1. Be objectives-oriented
2. Be disciplined
3. Know your stakeholders and their expectations and communicate ruthlessly
4. Have a plan (but be ready to adapt)
5. Learn and improve

Focus on these fundamentals and you've got a good chance at success!



Questions?

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