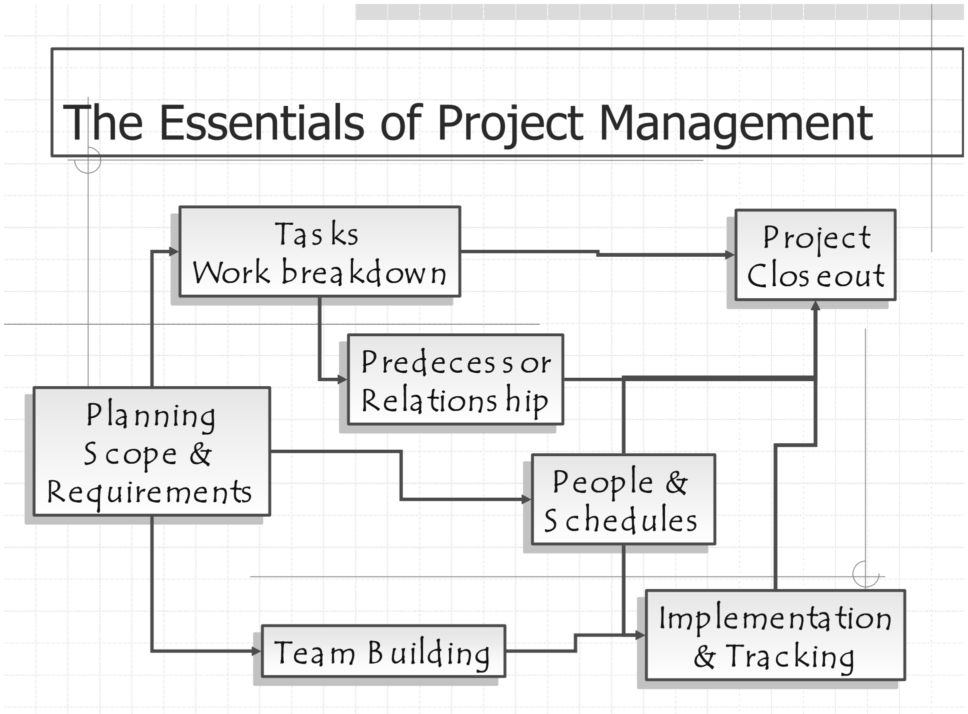
Introduction

This book is titled the "Essentials of Project Management" and it's just that. We're going to take you through a 19-step process for planning, scheduling and leading your project team on small projects. We'll go through a process of working with your boss to:



- *Define the project scope then*
- *Develop our requirements by building an achievement network.*
- *Plan how to lead the project team and create a productive team culture and*
- *Ask the boss for certain kinds of project authorities in a project charter.*
- *Prepare a work schedule for every member of the project team and*
- *Make clear assignments to them so they'll know what's expected.*
- *Gain final approval for our project plan and then launch the project.*
- *Track actual progress against the plan, report progress and solve problems we'll encounter.*

There are many things this book will not teach you. We won't deal with the statistics of risk or the alternative ways to develop work estimates or the accounting required for project budgets. You'll learn the essence of project management but not all of the detailed information in the Project Management Body of Knowledge (PMBOK™). This book is intended for people running smaller projects with most of the project team coming from their own work unit. As mentioned above, we won't be doing formal work estimating or capacity planning for the resources working on the project. Rather, we'll use estimates of the duration, how long a task will take, as the basis for the project plan and tracking.

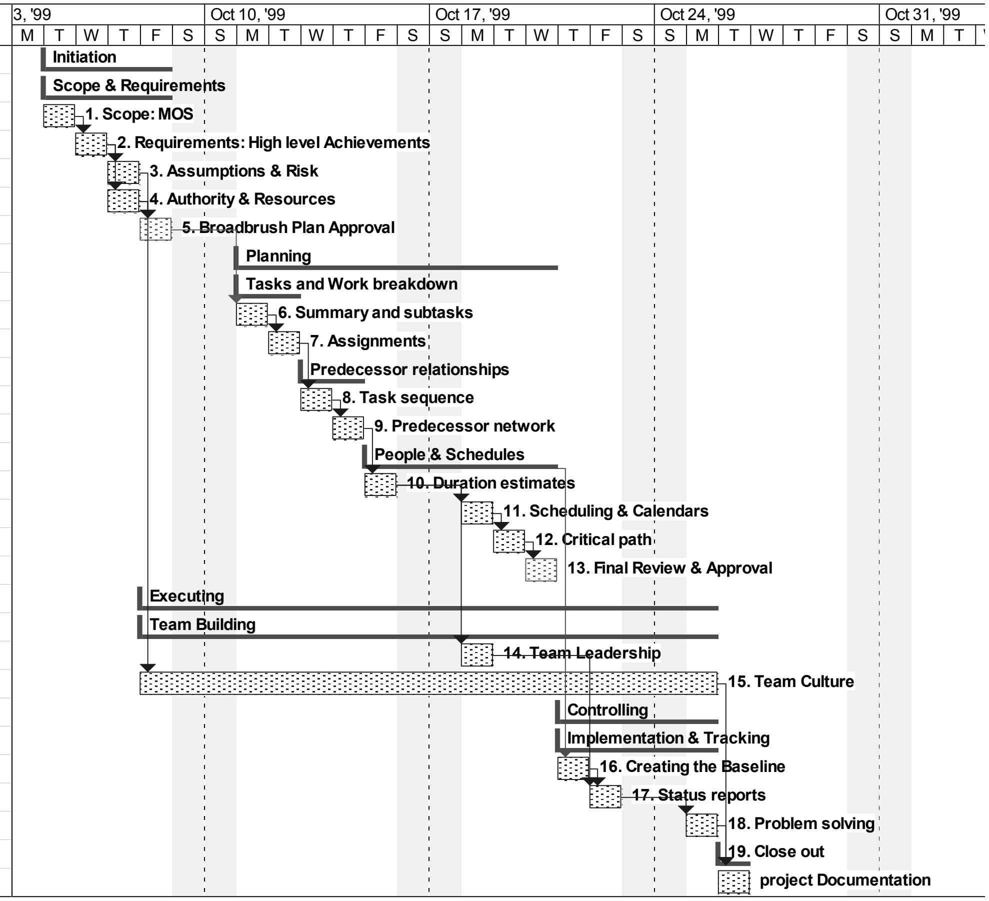
We'll also use project management software in a very straightforward, simple way. This book has many illustrations of applying this simple methodology in Microsoft Project®. The 19-step process can be applied with paper and pencil or a spreadsheet application such as Microsoft Excel®. However, using project management software even with this simple methodology is a big time saver so we recommend that approach. No matter how you build the plan, our objective is not to spend a lot of time in the software. The methodology is designed for you to spend an hour or two developing the plan and then 10 or 15 minutes a week using the software to update it. You'll spend the rest of the week managing the project.

In sum, *Essentials of Project Management* addresses first level project management tools. It's appropriate for smaller projects and teams with few cross-functional resources whose business purpose has a tactical focus. Our more advanced publications like *People, Budgets & Software, Managing Information Technology Projects* and *Managing Engineering & Construction Projects* addresses second-level projects. Here resources are drawn from across functional lines and utilization, budgets and cost control are important. The business purpose of these projects affects several functional units. *Managing Complex Projects* addresses third level project management where the scope aims at a client's or a user's strategic business results. These projects are accepted into executive portfolios after rigorous justification, prioritization and resource allocation. These projects warrant strategic as well as tactical planning, formal risk assessment and trade-off analysis to meet the business needs of user or client accounts.

19-step Process

The 19 steps in our process are listed in order on the Gantt chart below. As you'll see, the process is very sequential, except for the team-building step which runs for most of the project. As long as we have a Gantt chart in front of us, let's take the opportunity to summarize the key elements of any project plan. Down the left hand column, you'll see a list of tasks. This is our work breakdown structure that comes from the requirements we developed during the planning phase. You'll note that some of the tasks are indented and others are not. Those that are flush against the left hand margin are our summary tasks. Indented under each summary task are its subtasks, the components of the summary task. The main portion of the Gantt chart is a graphic that shows boxes for each of our subtasks and darker lines with arrows for the summaries. You'll note that there are lines that connect the subtasks. These lines show our predecessor relationships, what tasks have to be finished before another task can start. Look at the Gantt chart and "step 8 - Task sequence." You see that an arrow points from the end of step 8 to the beginning of step 9. That tells us that step 8 has to be finished before step 9 can start. These predecessor relationships determine the sequence in which the tasks in our project will be done.

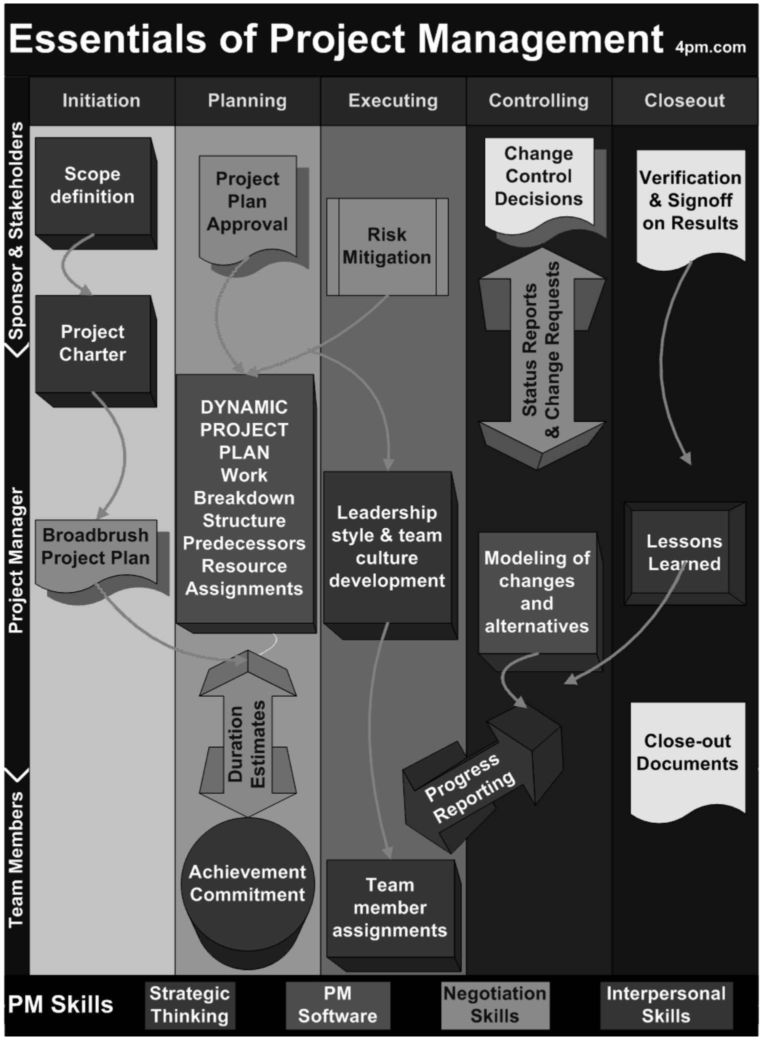
ID	Task Name
1	Initiation
2	Scope & Requirements
3	1. Scope: MOS
4	2. Requirements: High level Achievements
5	3. Assumptions & Risk
6	4. Authority & Resources
7	5. Broadbrush Plan Approval
8	Planning
9	Tasks and Work breakdown
10	6. Summary and subtasks
11	7. Assignments
12	Predecessor relationships
13	8. Task sequence
14	9. Predecessor network
15	People & Schedules
16	10. Duration estimates
17	11. Scheduling & Calendars
18	12. Critical path
19	13. Final Review & Approval
20	Executing
21	Team Building
22	14. Team Leadership
23	15. Team Culture
24	Controlling
25	Implementation & Tracking
26	16. Creating the Baseline
27	17. Status reports
28	18. Problem solving
29	19. Close out
30	project Documentation



The diagram also breaks out our process into the 5 major categories or domains, as developed by the Project Management Institute (PMI®). These domains are

- *Initiation*
- *Planning*
- *Executing*
- *Controlling*
- *Close-out*

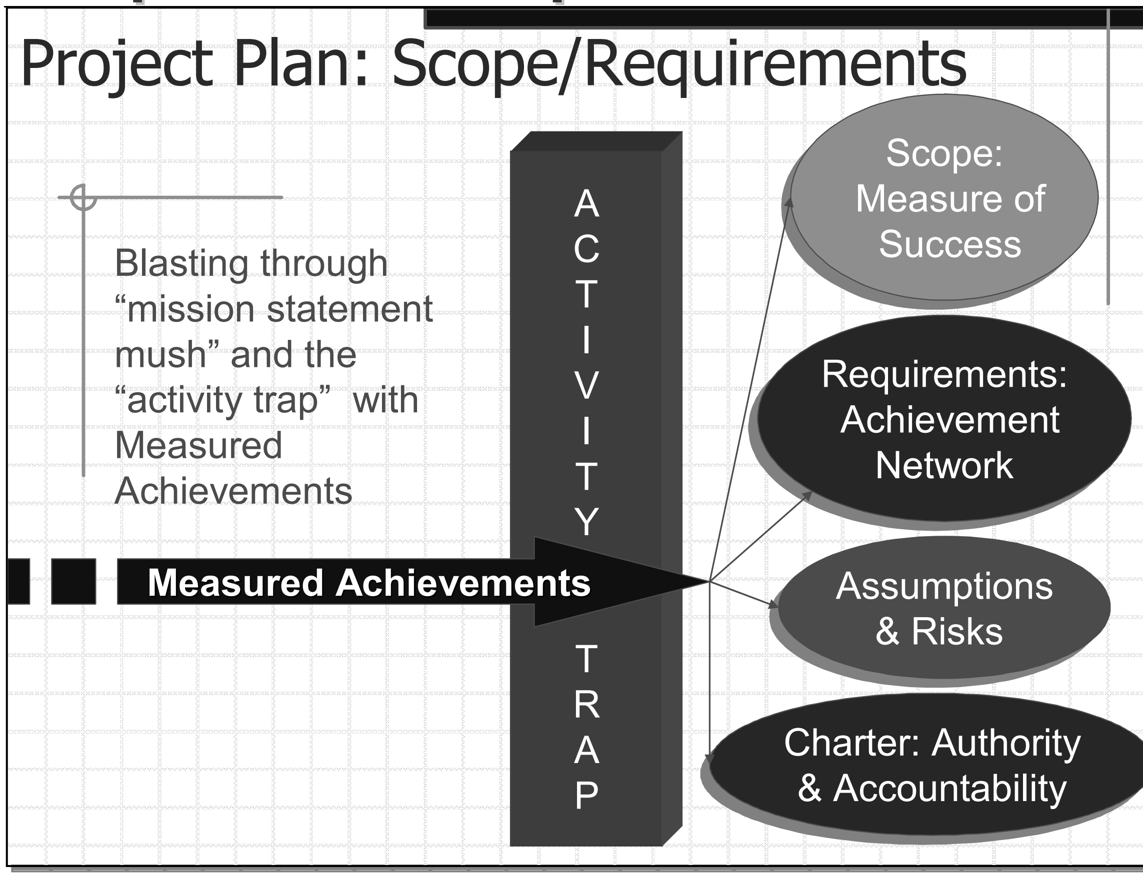
PMI® has also develop a Professionalism and Ethics section which we address in later texts.



Once we have defined the project's scope and requirements, our process will be to lay out the tasks that we need to complete to reach that objective. Then, we'll link them with predecessors to specify the sequence. Last, we'll estimate the duration of each task and assign people to them. After we do that, we'll let the software calculate how long the project takes to complete and then we'll adjust the project plan to try and finish sooner. Last, we'll track actual performance, develop solutions to problems and report status.

For additional reading and information on the topics covered in chapter #1 consult the Supplemental Reading Appendix and also visit our website http://www.4pm.com. There, use the password that we sent you with your book invoice to access even more information for *Essentials of Project Management*.

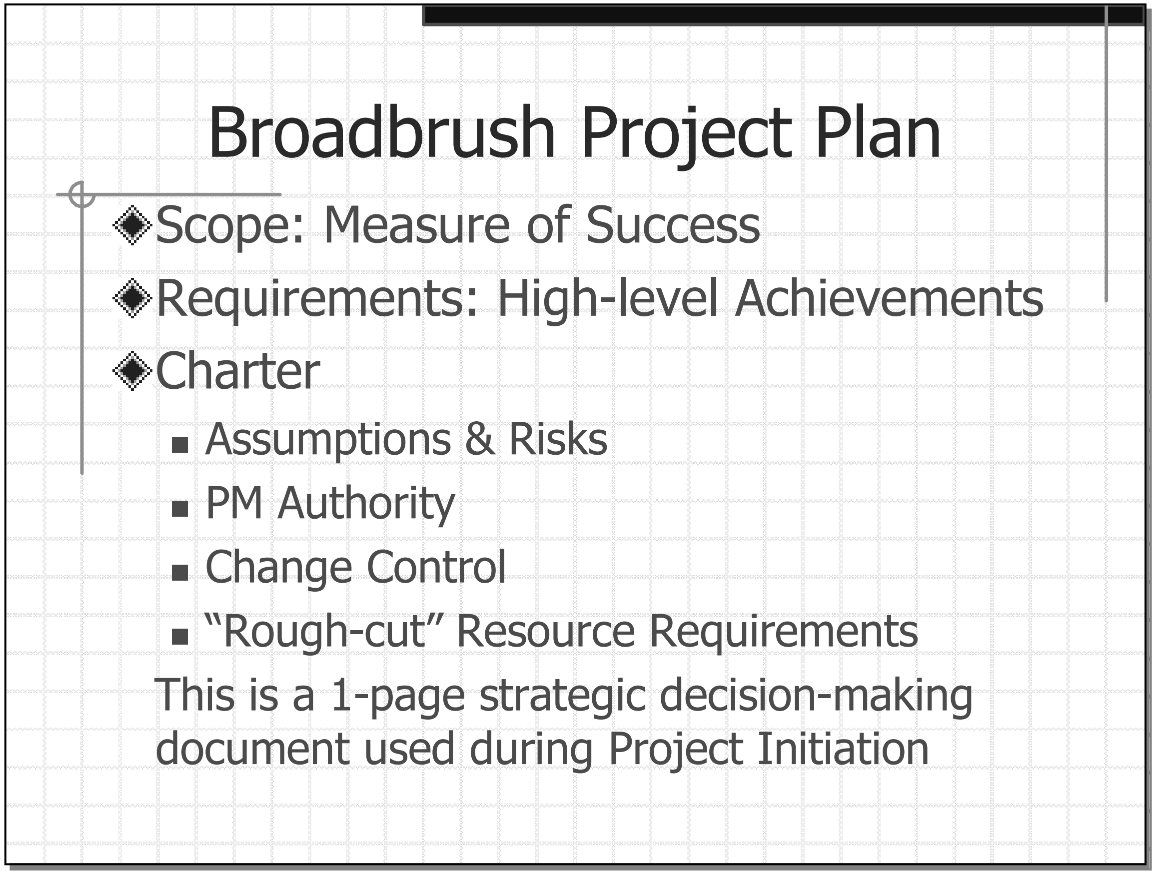
Chapter One: Scope



We start our project management work by defining the scope of the project. That is, we define the project's business objective. When we set about defining the scope during project planning there are a number of traps to avoid. One trap is thinking about what we have to do rather than the project's "end results." Thinking about the activities we need to complete is much easier than thinking about the business outcome the project should produce. This is the activity trap where we become consumed with detailing all the "to do's" in the project; sometimes we get so consumed with those delicious details that we lose sight of the business purpose. In the activity trap, a project manager (PM) receives a project assignment, thinks about the first thing that has to be done and starts work, figuring that they'll think about the next step when they come to it.

Sometimes, we cloak our descent into the activity trap by writing a long and flowery mission statement for the project. This does no harm unless it is a substitute for making the hard "end result" decisions up front. We need to specify exactly what the project will deliver and what it will not deliver. Being that explicit at the beginning may cause some discussion and disagreement but it is far better to work through those conflicts before we start work rather than discovering them when we are almost done. Unfortunately, the activity trap snares so many PMs that it is one of the two leading causes of project failure. The activity trap wastes resources and frustrates project team members with continuously changing assignments. The lure of the activity trap, that bottomless pit, has ruined countless projects.

Project Planning



We'll avoid the activity trap with a 1-2 page document, called the Broadbrush plan which covers the big-picture decisions that are required before we can start our project. When the project sponsor and stakeholders approve the Broadbrush plan, the Initiation phase of the project is complete. The key to this process is to avoid those delicious technical details that quickly drag us into the "activity trap." Our focus during a Broadbrush planning process is to provide the boss with the opportunity to make decisions about the end results the project will produce. Our focus is on the measured business-relevant outcomes not the details of how we will achieve them. We also want to secure the project executive's decisions on cross-functional authority that support the way we'll manage the project team. We keep the document short and high-level so we engage the executive's attention. We can develop long formal plans or contracts later when the strategy is approved.

A Broadbrush project plan is never long but requires thought, decisions and agreement on four things:

- *The measure of project success (MOS™) - an unambiguous measurement of the project's outcome. For example "Answer 90% of our customers' inquiries in 120 seconds or less with no more than 5% callbacks on the same problem. (Scope)*
- *A High-level Achievement Network (HLA™) - a hierarchical network of measured achievements that leads to the MOS™. (Requirements)*