

Introductory Project Management Guide

Introduction

Suppose you are a rising star at work and the boss has given you your first assignment to head up a project. Depending on the nature of the project and what kind of work you do, you might have to engage in a variety of tasks that you haven't tackled before, such as assembling a team to complete the project on time and on budget, mapping out a plan and monitoring your progress at key steps along the way, using appropriate planning tools such as project management software or wall charts, and keeping your team motivated and on target.

Perhaps you have managed projects before, but not recently. Or, you have been given a new kind of project you are not familiar with, and you want to make sure you handle the job right. If so, you've come to the right place. The *Project Management Guide* gives you the essence of what you need to know, in terms of successful project management from A to Z.

Each lesson can be read and absorbed in about 10 minutes. We cover crucial aspects of project management including plotting out your path, drawing upon age-old and cutting-edge supporting tools, expending your resources carefully, assembling a winning team, monitoring your progress, adjusting course (if you have to), and learning from your experience so that you will be even better at managing other projects in the future.

If you are like many professionals today, you are very busy! Your time is precious. When you're handed a challenging assignment and need some direction, you need it in a hurry. And that is precisely what the *Project Management Guide* offers you, a quick reference tool—divided into 18 crucial aspects of project management—that offers the basics. You will be able to digest a lesson or two each morning if you choose, before everyone else gets to work. Moreover, with this handy pocket guide, you are never more than a few pages away from homing in on the precise information that you need.

So, let's get started on the path to effective project management.

Lesson 1. So You're Going to Manage a Project?

In this lesson, you learn what a project is, essential skills for project managers, and what it takes to be a good project manager.

The Elements of a Project

What exactly is a project? You hear the word used all the time at work, as well as at home. People say, "I am going to add a deck in the backyard. It will be a real project." Or, "Our team's project is to determine consumer preferences in our industry through the year 2010." Or, "I have a little project I would like you to tackle. I think that you can be finished by this afternoon."

TIP

When you boil it all down, projects can be viewed as having four essential elements: a specific timeframe, an orchestrated approach to co-dependent events, a desired outcome, and unique characteristics.

Specific Timeframe

Projects are temporary undertakings. In this regard, they are different from ongoing programs that obviously had a beginning, but may not have a desired end, at least for the foreseeable future. Projects can last years or even decades, as in the case of public works programs, feeding the world's hungry, or sending space crafts to other galaxies. But most of the projects that you face in the work-a-day world will be somewhere in the range of hours to weeks, or possibly months, but usually not years or decades. (Moreover, the scope of this book will be limited to projects of short duration, say six months at the most, but usually shorter than that.)

A project begins when some person or group in authority authorizes its beginning. The initiating party has the authority, the budget, and the resources to enable the project to come to fruition, or as Captain Jean Luc Packard of the Starship Enterprise often said, "Make it so." By definition, every project initiated is engaged for a precise period, although those charged with achieving the project's goals often feel as if the project were going on forever. When project goals are completed (the subject of discussion below), a project ends and, invariably, something else takes its place.

TIP

Much of the effort of the people on a project, and certainly the use of resources, including funds, are directed toward ensuring that the project is designed to achieve the desired outcome and be completed as scheduled in an appropriate manner.

Along the way toward completion or realization of a desired outcome, the project may have interim due dates in which "deliverables" must be completed. Deliverables can take the form of a report, provision of service, a prototype, an actual product, a new procedure, or any one of a number of other forms. Each deliverable and each interim goal achieved helps to ensure that the overall project will be finished on time and on budget.

Plain English

Deliverables

Something of value generated by a project management team as scheduled, to be offered to an authorizing party, a reviewing committee, client constituent, or other concerned party, often taking the form of a plan, report, prescript procedure, product, or service.

An Orchestrated Approach to Co-dependent Events

Projects involve a series of related events. One event leads to another. Sometimes multiple events are contingent upon other multiple events overlapping in intricate patterns. Indeed, if projects did not involve multiple events, they would not be projects. They would be single tasks or a series of single tasks that are laid out in some sequential pattern.

Plain English

Task or event

A divisible, definable unit of work related to a project, which may or may not include subtasks.

Projects are more involved; some may be so complex that the only way to understand the pattern of interrelated events is to depict them on a chart, or use specially developed project management software. Such tools enable the project manager to see which tasks need to be executed concurrently, versus sequentially, and so on.

Plain English

Project Manager

An individual who has the responsibility for overseeing all aspects of the day-to-day activities in pursuit of a project goal, including coordinating staff, allocating resources, managing the budget, and coordinating overall efforts to achieve a specific, desired result.

CAUTION

Coordination of events for some projects is so crucial that if one single event is not executed as scheduled, the entire project could be at risk!

Effective project management requires the ability to view the project at hand with a holistic perspective. By seeing the various interrelated project events and activities as part of an overall system, the project manager and project team have a better chance of approaching the project in a coordinated fashion, supporting each other at critical junctures, recognizing where bottle necks and dead ends may occur, and staying focused as a team to ensure effective completion of the project.

Plain English

Holistic

The organic or functional relations between the part and the whole.

A Desired Outcome

At the end of each project is the realization of some specific goal or objective. It is not enough to assign a project to someone and say, "See what you can do with this." Nebulous objectives will more than likely lead to a nebulous outcome. A specific objective increases the chances of leading to a specific outcome.

Plain English

Objective

A desired outcome; something worth striving for; the overarching goal of a project; the reason the project was initiated to begin with.

While there may be one major, clear, desired project objective, in pursuit of it there may be interim project objectives. The objectives of a project management team for a food processing

company, for example, might be to improve the quality and taste of the company's macaroni dish. Along the way, the team might conduct taste samples, survey consumers, research competitors, and so on. Completion of each of these events can be regarded as an interim objective toward completion of the overall objective.

In many instances, project teams are charged with achieving a series of increasingly lofty objectives in pursuit of the final, ultimate objective. Indeed, in many cases, teams can only proceed in a stair step fashion to achieve the desired outcome. If they were to proceed in any other manner, they may not be able to develop the skills or insights along the way that will enable them to progress in a productive manner. And just as major league baseball teams start out in spring training by doing calisthenics, warm-up exercises, and reviewing the fundamentals of the game, such as base running, fielding, throwing, bunting and so on, so too are project teams charged with meeting a series of interim objectives and realizing a series of interim outcomes in order to hone their skills and capabilities.

The interim objectives and interim outcomes go by many names. Some people call them goals, some call them milestones, some call them phases, some call them tasks, some call them subtasks. Regardless of the terminology used, the intent is the same: to achieve a desired objective on time and on budget.

Plain English

Milestone

A significant event or juncture in the project.

Time and money are inherent constraints in the pursuit of any project. If the timeline is not specific—the project can be completed any old time—then it is not a project. It might be a wish, it might be a desire, it might be an aim, it might be a long held notion, but it is not a project. By assigning a specific timeframe to a project, project team members can mentally acclimate themselves to the rigors inherent in operating under said constrictions.

Plain English

Timeline

The scheduled start and stop times for a subtask, task, phase, or entire project.

CAUTION

Projects are often completed beyond the timeframe initially allotted. Nevertheless, setting the timeframe is important. If it had not been set, the odds of the project being completed anywhere near the originally earmarked period would be far less.

Although the budget for a project is usually imposed upon a project manager by someone in authority, or by the project manager himself—as with the timeframe constraint—a budget serves as a highly useful and necessary constraint of another nature. It would be nice to have deep pockets for every project that you engage in, but the reality for most organizations and most people is that budgetary limits must be set. And it is just as well.

TIP

Budgetary limits help ensure efficiency. If you know that you only have so many dollars to spend, you spend those dollars more judiciously than you would if you had double or triple that amount.

The great architect Frank Lloyd Wright once said, "Man built most nobly when limitations were at their greatest." Since each architectural achievement is nothing more than a complex project, Wright's observation is as applicable for day-to-day projects routinely faced by managers as it is for a complex, multinational undertaking.

Unique Characteristics

If you have been assigned a multipart project, the likes of which you have never undertaken before, independent of your background and experience, that project is an original, unique undertaking for you. Yet, even if you have just completed something of a similar nature the month before, the new assignment would still represent an original project, with its own set of challenges. Why? Because as time passes, society changes, technology changes, and your workplace changes.

Suppose you are asked to manage the orientation project for your company's new class of recruits. There are ten of them, and they will be with you for a three-week period, just like the group before them. The company's orientation materials have been developed for a long time, they are excellent, and, by and large, they work.

You have excellent facilities and budget, and though limited, they have proven to be adequate, and you are up for the task. Nevertheless, this project is going to be unique, because you haven't encountered these ten people before. Their backgrounds and experiences, the way that they interact with one another and with you, and a host of other factors ensure that challenges will arise during this three-week project, some of which will represent unprecedented challenges.

Plain English

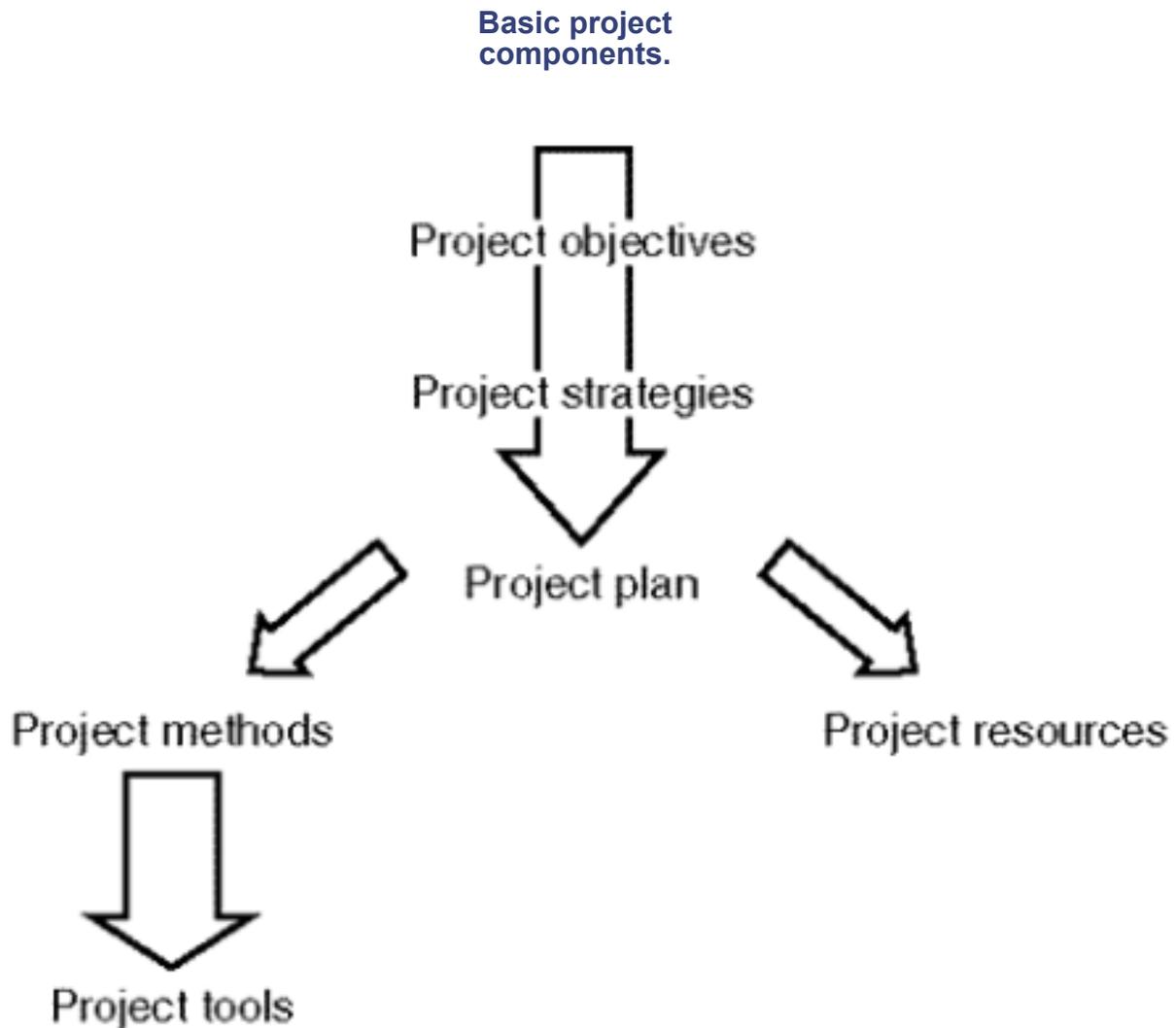
Project

The allocation of resources over a specific timeframe and the coordination of

interrelated events to accomplish an overall objective while meeting both predictable and unique challenges.

Project Planning

All effectively managed projects involve the preparation of the project plan. This is the fundamental document that spells out what is to be achieved, how it is to be achieved, and what resources will be necessary. In *Projects and Trends in the 1990s and the 21st Century*, author Jolyon Hallows says, "The basic project document is the project plan. The project lives and breathes and changes as the project progresses or fails." The basic components of the project, according to Hallows, are laid out in the figure below.



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"With the plan as a road map, telling us how to get from one point to another," says Hallows, "a good project manager recognizes from the outset that a project plan is far more than an

academic exercise or tool for appeasing upper management. It is the blueprint for the entire scope of the project, a vital document which is referred to frequently, often updated on-the-fly, and something without which the project manager cannot proceed."

Plain English

Scope of the project or scope of work

The level of activity and effort necessary to complete a project and achieve the desired outcome as measured by staff hours, staff days, resources consumed, and funds spent.

Prior to laying out the project plan (the subject of [Lesson 4, "Laying Out Your Plan"](#)), the manager starts with a rough pre-plan—this could take the form of an outline, a proposal, a feasibility study, or simply a memorandum. The preplan triggers the project.

From there, a more detailed project plan is drawn up that includes the delegation of tasks among project team members, the identification of interim objectives, which may also be called goals, milestones, or tasks, all laid out in sequence for all concerned with the project to see.

Once the plan commences and the project team members, as well as the project manager, begin to realize what they are really up against, the project plan is invariably modified. Hallows says that

"all plans are guesses to some extent. Good plans are good guess, bad plans are bad guesses." No plans are analogous to horrible guesses.

TIP

Any plan is better than no plan, since no plan doesn't lead anywhere.