

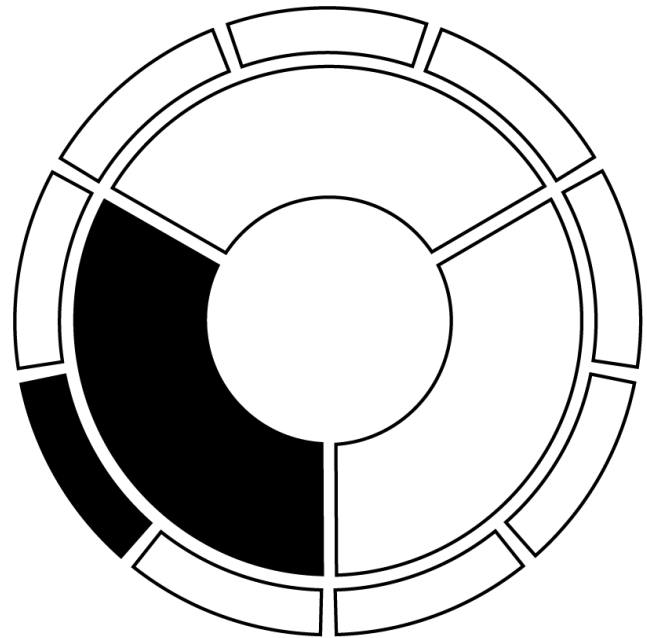
PROJECT MANAGEMENT

PROJECT IMPLEMENTATION

This skill set is concerned with planning quarterly and monthly projects, defining objectives, workstreams, tasks and timelines, coordinating the people and activities necessary to stay on track and consistently complete projects on time and on budget.

REFLECTION QUESTIONS

- How do we currently plan our quarterly and monthly projects?
- How do we define objectives, workstreams, tasks and timelines?
- How do we currently coordinate the people and activities necessary to stay on track with project milestones and budgets?

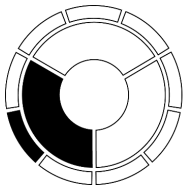


FUNDAMENTALS OF PROJECT MANAGEMENT

A simple definition of “project” is an “effort” that managers and teams undertake with a specific definition of success (or deliverables), usually combined with a clear beginning and end to that effort.

Projects are distinct from the ongoing management activities that might be called “management responsibilities” or “operations”. Roughly half of the work managers undertake in the workplace would fall into this second category of ongoing responsibilities. We might think of these as well-defined processes, routines, or weekly activities. In other words, “operations”. The other half of activities that managers are usually engaged in are the efforts that we will call “projects”. Quality management pioneer Joseph Juran defines a project as “a problem scheduled for a solution”.





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While this definition may be technically correct, the word “problem” does not fully capture the opportunities that are, in fact, the motivation behind many projects.

A project may be undertaken to capitalize on a business opportunity, or to improve a process that will enable greater success for the organization.

For example, a project could be started to design and implement an employee training program, to design a new product or upgrade an existing product, or to restructure a department. In addition to thoughtfully planning a project, to achieve the intended outcome, projects must be actively managed in specific ways over time, from inception to completion. Before beginning a project, it is important to take time to determine the problem the project is trying to solve or the opportunity it is attempting to capitalize on.

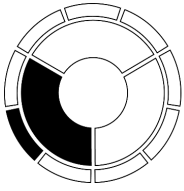
Popular project management author and expert James P. Lewis once wrote, “Projects do not fail at the end; they fail at the beginning”. While some projects are more simple and others are more complex, every project plan should offer the stakeholders’ clarity on the answers to five fundamental questions. For simplicity’s sake, we will frame these project planning questions as... Why? What? How? When? Who? We will look at each of these project planning questions in more detail in a separate training video.

Clearly, good intentions are never enough to implement a project successfully. The details of the activities and tasks associated with the project, must be managed carefully. And this especially includes the human element of every project: the people doing the work. In another section, we will review the keys to managing project activities over time so that your projects will be concluded successfully with the best chance of achieving their stated purposes and goals.

PROJECT PLANNING

Many managers are self-described “action takers” and “doers”. These managers enjoy getting things done, accomplishing outcomes, and making progress. Perhaps you can identify with this?





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While this is certainly a positive thing, the downside is that many managers have a bias for “doing” over “planning”. Experience shows that most projects that fail, suffer more from poor planning than poor implementation.

Unfortunately, many managers’ performance suffers, along with their departments and even their broader organization’s, as a result of “successfully implementing a poorly designed strategy”. The old, familiar saying is perhaps cliché and an oversimplification, but it is nevertheless relevant here. “If you fail to plan, you plan to fail”.

One well-known project management expert has estimated that each hour allotted to project planning results in a three-hour decrease in the time it takes to successfully implement the project. It is also worth highlighting that well-planned projects are far more likely to result in success than poorly-planned projects.

As the other, familiar saying goes, “An ounce of prevention is equal to a pound of cure”. Clearly, not all projects are the same. Complex projects require a comprehensive, detailed project plan.

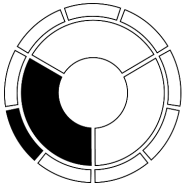
Other projects are more modest in scope and may be implemented with a basic “action plan” that primarily consists of a task list. Yet, even small projects require clarity on the reason for the project, the intended outcomes (or deliverables), and some indication of who is going to do what tasks (and when).

Keep in mind that while a detailed project plan may be essential in the early phases of a large, complex project, the act of planning is not necessarily a one-time event that takes place only at the start.

For large projects, it may take several iterations of the plan before the kick-off. It may also require ongoing updating of the plan as new information becomes available (including the results from the initial stages of the project efforts). This is sometimes referred to as “dynamic steering”.

A project plan should answer five questions, which we summarize as... Why, what, how, when, and who?





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Why

“Why” refers to the purpose of the project. Put another way, the reason for undertaking the effort.

The purpose of the project must take into account the context of the department, the organization and its needs and opportunities in the current time frame. The time frame could be this year, this quarter or even this month, and should be informed by internal and external organizational circumstances.

What

“What” refers to the outcomes or deliverables of the project. Put another way, this is what the organization will have in place after the project concludes successfully. You can think of the “what” as the objectives of the project.

Note that “what” is not the specific actions, work streams or tasks. Nor is it the “milestones” of the project. Those are covered under another section of the project plan. Think of the “what” as “What will we have when the project is completed successfully”.

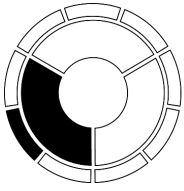
How

The “how” refers to the way the project will be pursued. The “approach” or the “strategy” behind the project. The “how” refers to the methods, the “work streams” and the “sub-projects” that must be undertaken in order for the whole project to succeed. Think of this as “How we will succeed with this project”.

When answering this question, you will need to brainstorm the relevant details of the project so that no important consideration is overlooked.

Some managers think of this as “framing” out the work to be done into major issues and activities, along with a breakdown of each. This results in a high-level action plan that outlines major activities, responsibilities and the basic timeline.





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When and Who

The “when” and “who” questions are answered by what we can refer to as a “Task List”. Each major work stream, or sub-project, should have its own task list.

You are already familiar with a task list. It essentially lists the name of the task, the target completion date (when), and the person responsible for completing the task by the date (who). Every project should have a project plan. The five project planning questions (Why, What, How, When, Who) can be answered briefly, or thoroughly, depending on the complexity of the project., we will put this Project Plan to good use as we look at managing an active project to successful completion.

MANAGING AN ACTIVE PROJECT

The implementation of a successful project comes down to actually doing the “how” (the work streams) that have been outlined in the project plan. With an emphasis on the exact tasks that are detailed in the “when” and the “who” sections of the project plan. There are two different ways to view the “when” and “who” of a project plan.

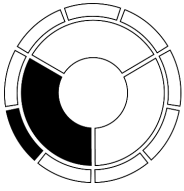
The task lists associated with each work stream (or sub-project).

The major milestones and due dates of key tasks seen on the project schedule, timeline or “Gantt Chart”.

Different organizations, teams and managers use different tools to manage their “Tasks Lists”. While some managers use a spreadsheet to track their specific tasks, with target dates and the person responsible for each. Many organizations prefer the efficiency and visibility that formal project management software tools provide.

Tasks lists detail every single task, grouped according to work streams and deliverable milestones. These lists should include a clear description of the task, the name of the person responsible for it, the target completion date, and optionally, the current percentage completed.





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The *Project Schedule* (milestone calendar or Gantt Chart) indicates the major milestones or deliverables which are outcomes as a result of the completion of groups of tasks. The project schedule details the timeline and sequence of the major steps that must be completed for the project to be successful.

This is especially important for complex projects with multiple work streams and teams whose work needs to be well-coordinated. Ultimately, the best way to keep a project on track is for each team member to assume responsibility for his or her own work. The essence of managing a project to completion is to have regularly scheduled project team meetings.

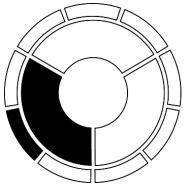
Depending on the scope and timeline of a project, this could be bi-weekly, weekly, or even daily.

During these project team meetings, the project plan, task list, and project schedule are reviewed together with the team. Any deviation from the plan is discussed, and the team members can collaborate to resolve scheduling conflicts or support bottlenecks or sticking points as the project unfolds.

The following conditions make it much easier for a project leader to keep his or her project on track.

- Clearly defined tasks that tie back to the project plan (the work streams).
- Each person responsible for each task has the knowledge and skills necessary to complete it successfully.
- Each person must manage his/her time effectively so that enough time is scheduled on his/her calendar each week to complete the tasks by the deadline.
- Team members provide updates about progress, including receiving feedback and input on best ways to coordinate work and complete the tasks correctly.
- A clear definition of scope of project and authority to take corrective action if the project gets off track or is no longer on the intended timeline.





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Conclusion

This lesson introduced the best practices associated with project management. This included the five project planning questions that all team members should know the answers to, as well as best practices for managing active projects. Project management is the linkage between your annual and quarterly initiatives (and major efforts) and your week to week productivity. This skill is essential for managers and leaders to perform their role effectively.

