The Reluctant Project Manager

Hints & Tips to Get Your Project Finished!

For many managers, projects are just another task they would rather not have to do.

Many organisations are not set up with projects in mind but, if they are going to develop as a business, they need to successfully undertake projects, none the less. New products need to be launched, new IT systems need to be implemented and new HR policies need to be put in place.

In an ideal world, managers would be trained in project management skills as part of their career development and would be equipped to take on these challenges. But if you are reading this, that's probably not the case.

This booklet is designed to help you avoid the pit-falls and get that project completed, without the benefit of classic project management expertise. It's not pretty, but it works!

Contents

Projects in Context

So what's the big deal anyway?

You might think that projects are something other companies do, like road builders or event organisers . But they are the most effective way to introduce change in any organisation so even if your products and services are fairly standard, you would still benefit from a successful project or two.

Incremental change is all very well but if you are faced with changes in legislation or a dynamic new competitor, you need a step change to stay competitive. A professionally managed project will help you achieve the change you need efficiently.

But we do this anyway as "business as usual"!

There's a distinction to be made between a properly managed project and a series of tasks that goes on indefinitely. Without the specialist skills that running a project introduces, such as planning, risk management or change control, introducing change can be frustrating, slow and expensive. Worst of all, the staff or customers that are affected can lose heart just when you need their support.

So when do I know it's a project?

I won't bore you with the formal definition but if the task has a specific objective, with a specific fund of money and people to work on it, to be completed within a defined timescale and that will be disbanded when you finish , it's a project. There are small ones (£100k—£1m) and large ones (£1m+) but they all have the same challenges to be overcome. Its just a case of how to project manage it not if.

How do other companies approach these projects?

For some organisations, projects are 'business as usual' and have an organisation to match with a Chief Projects Officer, Project Support Office and fulltime Project Managers. But most companies are like yours; a functionally organised structure with department heads. The approach to adopt is called **matrix management;** although staff report vertically, they are assigned to projects under the control of the project manager and so report to two bosses for the duration of the project. Yes, this raises it's own issues which we will come to soon but realistically it's the only way to work

I've been a manager for ages. Why should this project be a problem?

I'm afraid there is a difference between line management experience and the skills and techniques needed to manage a project successfully.

Project management presents a number of unique challenges that you are unlikely to have faced in your line management role:

- As we've seen, projects introduce a lot of **change** very rapidly and it's important that you are able to manage this change effectively, both in making sure it is implemented to meet the business needs of the project but also to help people accept and make the most of this change in their day-to-day activities

- You will probably be working with a new team who are unfamiliar with you and each other so you need to demonstrate your **leadership and team building** skills to get the best out of your team. We will talk more about this later.

- Because of the inherent uncertainty in a project, you will need to manage this **risk** effectively. This means that you will need to spend time identifying risks, deciding how to handle them and then making sure this happens. Again, we will return to this later in this booklet.

If I do what you say, how will that benefit my project?

Basically, by avoiding mistakes and improving quality. A rigorous approach helps you decide what you want, how you are going to do it and making sure the right person does it at the right time and cost. It's difficult to put a price on this but in most cases it will easily outweigh the additional time and cost of managing the project properly.

Before You Start

So who am I doing this for anyway?

If your project is change related then this isn't always an easy question to answer. No doubt there is an individual who came up with the idea in the first place but by the time it lands on your doorstep this isn't always clear. Your first task; **verify your sources** and get back to the originator to make sure you understand his/her real wants and needs.

But don't stop there. You need to identify the other **stakeholders** in the project; that is, the groups, companies and individuals affected by the project. You've already spotted the **customer**, (the person/group that fund the project and will realise the benefits) but there are also **users** (the person/group that interact with the results of the project) and various groups such as other departments, customers and vendors who are impacted in some way. Make sure you write down who they are, what their interest in the project is and most importantly how you will keep them up to date with the project. If they are a stakeholder they need to know.

I know what I should be doing but what about the others?

One of the biggest dangers of a project is that, because it's not been done before, everyone has their own idea what the results should be. You need to define the **scope** of the project very carefully and make sure the customers, users and your project team agree. How you write down the scope depends on the project but make sure you describe the **deliverables** (or results) of the project and highlight what requirements are **included and excluded** to avoid any ambiguity

What about the things I don't know yet?

Unless you have the gift of perfect foresight there are bound to be **assumptions** that will affect what you do. The key thing is to document them clearly; not everyone will make the same assumptions as you! If they are challenged or when you find out that they are correct or not, you can change these and re-plan accordingly, as we will see.

How am I going to do this?

There is usually more than one way of getting the results you are looking for. For example, you could develop that HR application you need in your IT department or you could select and buy an off-the-shelf application. Right up front, decide which **approach** you are going to take, as there is no room in your project for uncertainty. If there is an approach you would like to adopt but aren't confident it will work, then you should do a **feasibility study** as an initial step before you make your choice

What about the other stuff that is going on?

If you are lucky enough to be running a project with no external limitations on time, cost and resources then you can skip this one. For those in the real world, however, there are always **constraints** that you need to plan around such as changes to legislation, divestment of staff etc. Likewise any **dependencies** on the results of other projects for example should be identified. In both cases, make sure you verify the real situation from the appropriate manager and then document them

Where should all this be documented?

You should put all this information into a document commonly called a **Project Initiation Document (PID)**. Other names include Project Description or Project Specification but they are basically the same thing; a blueprint for your project. Without doubt, this is the single most important project document so even if you hate writing, don't neglect it.

Planning Your Project

So what do we need to do?

Any project should have a **project plan** that the project team work from. Strictly speaking, this is part of the PID but it's important enough to warrant a couple of pages on it's own. Especially as it will change repeatedly during the life of the project and so, unlike other parts of the PID, you will need to keep re-issuing it. If you are working with a software vendor, consulting company or other partner on your project, they will probably have a template project plan that you can use for reference. It's certainly worth asking as it can save a lot of time and, if nothing else, is a good checklist to make sure you've not missed anything. If you have to create a plan from scratch, then there are a few steps you should go through or it's easy to overlook tasks.

I'm heading for a Breakdown!

In this case, that's a good thing. What you need is a **Work Breakdown Structure (WBS)** which is a logical decomposition of the steps or tasks needed to deliver the results of the project. It doesn't sound much when it's described like that, but it's fundamental to planning, assigning resources and monitoring project performance. So make sure you do this carefully.
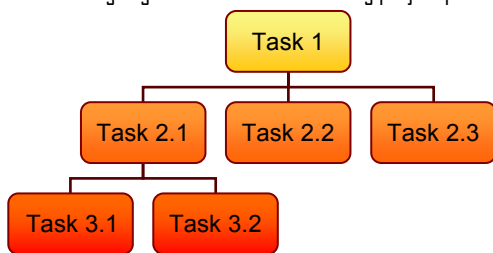
The first step is to list the major steps in the project e.g. design, build, test and implement. Then take each of these in turn and sub-divide them into individual tasks and sub-tasks e.g. review requirements, draw rough design, develop assembly drawing etc. Keep on going until you have the lowest level task that you would sensibly ask someone to do; as a rule of thumb, if it would take about a week to do then you are at the right degree of detail. By drawing these in a hierarchy, you'll have a logical basis for your project plan.

By the way, there is a variation of the WBS that uses deliverable products rather than project stages as the high level structure. There is no right or wrong way, as each approach has it's merits, so just choose which works for you and stick with it.

*But this doesn't tell me when my project will finish?*

Correct. The WBS is only the first step in the planning process and now you need to link these tasks into a sequence and timeline.

Firstly, review the tasks in your WBS and decide what sequence they need to be done in; usually this is quite logical and easy to figure out. Then draw these in a network diagram so that the logical flow of the project is from left to right. To find out the overall duration for the project, estimate a duration for each task (actually write it in the box) and then just add up the total time from left to right (in other words from start to finish).

You will notice that there are more than one paths from left to right so you need to add up the time for each path. The longest duration is actually the shortest time you can complete your project in and is called the **critical path** for obvious reasons. You will need to keep a close eye on this during the project.
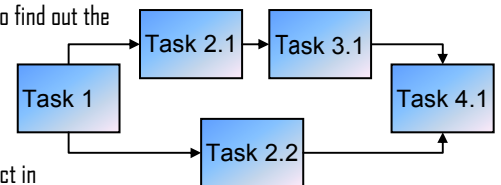
So who is going to do these tasks?

The final step in building your plan is to link the person or other resource required to each task. Ideally, define what skills and experience you would need for each task so you have the flexibility to select from a number of staff but if you are in a small organisation, you may just write names in straight away. Make sure you work out how much **work** is required per task, as it may be possible to reduce duration by adding overtime or by splitting a task between more than one resource. Also make sure you allow for holidays, training, sickness etc in calculating **availability**; as a rule of thumb, 'full-time' actually means 75% of actual working days.

Finally, if you have the same person lines up for more than one task, you may find you have overcommitted them and you will need to delay one task or find some more help if they are going to complete their work on time.

But It's Going to Take Too Long!

The first plan you come up with will probably not meet your constraints so you will need to go back and repeat this process. Check your estimates for work and duration, see if you can do some tasks in parallel but don't make unrealistic assumptions that will come back to haunt you later.

Getting Things Done

Now we've started what should I be doing?

Well first of all what are your **responsibilities** as project manager. Probably the following:

- day-to-day management of the project

- ensure the results of project are delivered to right quality, at the right cost and within the right timescale

- ensure the results of the project meet the needs of the project customer

What is interesting is that it does not include "Do the project work yourself" although many organisations may think this. In smaller projects, the project manager may be expected to do some of the project work themselves but it must be made clear **this is a different project role** and if the project manager is able to do it, he/she is working as a project team member not a project manager at that time. So the individual has two roles that they have to juggle.
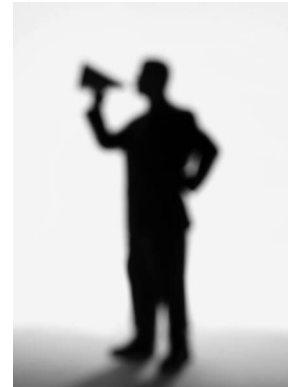
How do I manage on a daily basis?

Like any management role, there is a basic **perform-check-correct** process that you should have in the back of your mind. You should define and assign work to be performed by your project team, check the quality and time spent on each task as it is completed and then update the project plan and revise if necessary.

Except for the most simple of tasks, definition of the work should include a written description of what is needed, how it should be done and most importantly, how you will test it is fit for purpose. Without that, your project quality will suffer.

To check the work, ensure you have another person to run an independent QA check. This doesn't need to be as time consuming as it sounds; in many cases, a review of a document or a visual inspection of a component is all that is required.

If there is a QA problem or a delay in completing a task, then you need to see what impact this will have on your other project tasks and adjust the project accordingly. This is where project management software like MS Project comes into it's own, as you can make changes very quickly and update your team accordingly.

So it's really no different from my other management activities?

Actually, although it's similar, there are some specific things you should be doing that you probably won't be doing as part of your other responsibilities.

To start with, **change control** is a big part of the project managers job. As you go through the project, there will be suggestions on how the project can be improved by producing something new or different. You need to make sure that you look at these carefully, see what impact it would have on the project cost and timescale and, if it still makes sense, re-plan accordingly. You really need a written record of these change requests (an **issue log)** and what the outcome was, so you can track any changes in the project duration and cost. People have short memories when they come to review your project!

You also need to manage the **risk** in your project. There are risks both from within the project (what if your project team fall ill or some equipment doesn't work?) and from outside (what if regulations change or your company is acquired?). These should be documented in a **risk log** and you should then decide what to do about them; in many cases you can't avoid the risk but you can reduce it or make a **contingency plan** in case the risk becomes reality.

How can I help my project team?

In most cases, the project team will be from different departments or organisations, with different ways of working. A big part of your task is to ensure they swiftly become a proper team with a single objective, a positive and supportive culture and a single consistent way of working. This will test your leadership skills as well as your influencing and conflict management ability, so plan some team building and individual appraisal time into your diary.

Who Does What

What help can I expect with my project?

Believe it or not, the project manager isn't the only person with responsibility for the success of the project. Which makes sense, when you think about it, as though you may be able to deliver the results of the project there is no guarantee that they will deliver the benefits they were supposed to. Also, if you were responsible for the project, you should have the authority to stop it if necessary and that wouldn't be a sensible step as you may not have a completely objective view.

Instead, the overall ownership of the project should lie with a **project sponsor** (or project champion) who may be supported with other individuals on a **project board.** This individual is normally the senior manager who is both paying for the project and will get the benefit of the results of the project at the end. As such they own the business case for the project and have the final decision to stop the project at any time. After all, it's their money!

The project board may include other senior managers who advise and support the project sponsor in directing the project; a senior user, who represents the user community, and a senior supplier, who represents the project team and is often from a vendor or contractor. Having them on board ensures a blend of experience that can help with good decision making.

If you don't have a project sponsor for your project, get one straight away! Make sure their responsibilities are agreed and then you can concentrate on delivering the project.

But what about the project team?

You will recall that the PM is not responsible for doing the project. That's the project teams job and during the planning phase, you should have identified who does what. But the tricky part is in ensuring things get done. Most of the project team report to other line managers and so you don't have the normal levers of pay reviews and career management to help motivate them. Instead, you should rely on leadership and teambuilding (as mentioned before) and also define clearly the roles and responsibilities of the team,

For example, you need to ensure that the **responsibility** for doing a task implies the **accountability** for completing it satisfactorily. If tasks aren't done and there is no response, then you will quickly lose the commitment of the team.

To help you with this, involve the line manager of the staff in the project task, so that they underline the importance of the task.

I've also got these vendors to manage as well

Vendors and contractors are another special case; the commercial terms of reference may have been defined in a contract or agreement but you can't rely on that to manage them successfully. Remember that you have purchased human beings to help you on the project and so don't approach them in the same way you would buy your office stationery. They need leadership just like your own staff so, once you have selected them, consider them as 'part of the team'. They may also have significant experience in similar projects with other clients, so make the most of your investment and seek their advice and guidance.

In many cases, if there is a main vendor who is doing a significant part of the work, they may nominate a project manager of their own. This should make your life easier, as you can work directly with him/her and they will take care of updating their staff. But don't assume you can delegate ownership of the project to them; there can only be one project manager and that's you.
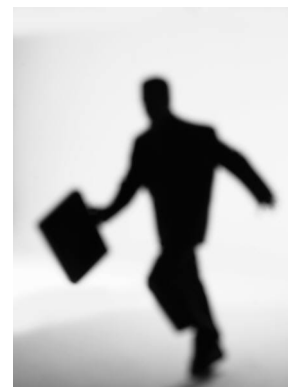
You mentioned the Project Support Office?

This individual or group is the 'owner' of the project management process in your organisation; they advise on procedures, help with planning and problem solving and general administration. Even if you don't have a PSO, try and get some admin support to help on a part time basis with collecting timesheets, putting reports together etc. It will let you focus on the real management tasks.

Keeping on Track

How do I know I'm making progress?

The first thing is to make sure you keep the project plan up to date, both with the revised schedule for the activities you've not done yet and the actual effort spent on those you have. By keeping separate revisions of the project, you will be able to compare the initial plan that you included in the PID with the latest planned completion date and, most importantly, know why it has changed.

But my MD wants to know what I've done as well

Of course he does. But what he doesn't want is a list of every individual task that has been completed; that would be far to much detail. Instead, when you create your plan you should identify **milestones** that you agree with your MD (or whoever the project sponsor is) These should be significant events or deliverables within the project and you report to him/her when these are competed and if they are early/late compared to your plan. This is an effective way of measuring progress in a meaningful and easy to understand way.

If things go wrong, won't my MD stop the project?

Well, he/she has the authority to do this and if the project is not going to be successful that may well be the right thing to do. The question is, when to do this and how do you and your MD know it's not going to work. When you planned the project, you should have identified major tasks or **stages** such as 'Design', 'Build' etc. Now, from your plan work out when you expect to complete these and arrange a meeting with your project board around that time. At this meeting, you will update the board on progress and your latest plan for the next stage and then ask for the go-ahead on the next stage. This gives the project sponsor a chance to decide if the project still meets his/her business case and whether it would be better to stop now, rather than invest more time and money.

Getting It Finished

Now we've gone live can I get on with something else?

Not quite yet I'm afraid. It's natural to think you're finished and certainly the project team have done most of their work but there's still work to do.

Firstly, you should update your project plan with the final actual figures for each task and write an **end project report** that summarises formally how you have performed against your PID. In particular, refer back to the original needs and benefits and explain how successful you expect the project to be. You should also include in this report any **lessons learned** when things went spectacularly well or badly, so that you or your colleagues don't make the same mistakes again or, more positively, repeat the successful things. This report should be reviewed by the project board and only then should they formally close the project.

Shouldn't I measure the benefits from the project?

The problem with this is that usually you won't be able to see the real business benefits until some time after the project is finished. That doesn't mean you should ignore them but you don't really want the project to remain open until this point in time. What you should do is plan how you will measure them and when, so that this vital step doesn't get forgotten. This **benefits analysis** isn't part of the project and so isn't necessarily your responsibility, so make sure you agree with the project sponsor who is going to do this.

What about the support staff?

That is another important task in closing the project. Most project deliverables, whether they are a new inventory system or a new HR policy, will need support and maintenance if they are to work effectively. So you should plan a handover to the staff responsible for this, train them thoroughly and provide the documentation they will need.

About SGK Consulting

If you would rather do this properly, we provide project management consulting and training to equip you with the expertise and knowledge to manage your next project with poise and panache.

We've even been known to roll our sleeves up and get stuck in ourselves on an interim project management basis.

So please get in touch and we'd be glad to meet up and see how we can help

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