


***Pragmatic PM:***  
*Five Tools for Success on Any Type  
of Project*

By Dave Pratt, PMP

**DHP**



**The Usual Scenario**

- You're the new person on the job, the new hire with eager eyes and a desire to prove yourself. Your boss approaches you with a smile on his face and worry in his eyes. "Sarah, I've got a project for you. There's this project..."

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## The Usual Scenario #2

- You're a volunteer for a large service organization in your community. You've been with the group for a couple of years. The club president approaches you. "Bill, the annual charity auction is in a couple of months. The chairperson has to leave town for family reasons. We need someone like you and Alex to manage the project. Think you two can pick up the project?"

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## 5 Top Reasons Projects Fail

- 1. Inadequately trained and/or inexperienced project managers;
- 2. Failure to set and manage expectations;
- 3. Poor leadership at any and all levels;
- 4. Failure to adequately identify, document and track requirements; and
- 5. Poor plans and planning processes.

(Source: *Frank Winter*)

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## Finding Success

The difference between success and failure:

- The lack of attention to project management principles that can lead to high failure rates for projects.
- In 2002, **56% of the firms surveyed claimed at least 1 project failure**, with the average loss per firm from these failures at \$12.5 million and the largest single IT project write-off of \$210 million. (Center for Business Practices).
- **28% of projects will fail outright and 46% will finish “Challenged”** – late, over budget or with reduced functionality (Standish Group)
- **75% of large software projects suffer significant cost and schedule overruns or fail outright**, with 50% a result of poor requirements gathering (Data and Analysis Center for Software, US Dept. of Defense Information Analysis Center)
- How many small IT or building construction/renovation fail unnoticed, with hardly a whimper?
- How many non-profit fund raisers never get off the ground, or fizzle because the project manager didn't have anywhere to turn for help? **DHP**



## Success - That Elusive Dream

- Success...
  - The federal level:
    - VA Medical System Integration – on track for success
    - The FBI's criminal tracking system – not so much
  - Our Own State
    - Many successful projects currently underway or finished in past year
    - Recent newspaper reports about specific projects – no so much
  - The Private Sector
    - Many banking and health care system success stories
    - Many subtle failures – no so much
  - Non-IT Projects
    - The Floating Bridge Upgrade
      - Ahead of Schedule
      - Under Costs
    - Home construction projects – not so much (note: personal bias)
    - Service organizations who raise massive amounts of money in spite of economic down-turns
- DHP**

## Where to you turn?

### ■ Traditional Texts?

- Hard to read
- Bombastic—verbose
- Seldom get to the point
- Impossibly long
- Applied text is difficult to find (although there are some good ones out there for specific elements of PM).

But who has the time?!?

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## Recent Examples of PM Books

Name	Publisher	Price	Year Released	# Pages	Competitive Ranking
Effective Project Management: Traditional, Adaptive, Extreme,	Wiley	\$31.50	2003	504 pages	6
The Art of Project Management	O'Reilly Media	\$35.39	2005	352 pages	3
A Guide To The Project Management Body Of Knowledge	Project Management Institute	\$29.97	2004	380 pages	4
Fundamentals of Technology Project Management	Mc Press; Bk&CD-Rom edition	\$32.97	2005	495 pages	5
Project Quality Management: Why, What and How	J. Ross Publishing	\$35.00	2005	161	1.
Project Requirements: A guide to Best Practices	Management Concepts	\$35.00	2006	226	1



## The Doctrine

- Project Plan
- Project Organization Chart
- Project Charter
- Scope Statement
- Scope Management Plan
- Requirements & Specifications
- Change Management Plan
- Work Breakdown Structure
- Project Schedule
- Schedule Management Plan
- Cost Estimates
- Cost Management Plan
- Cost Management Plan
- Staffing Management Plan
- Quality Management Plan
- Communications Management Plan
- Requirements Management Plan
- Risk Management Plan
- Risk Response Plan
- Procurement Management Plan
- Issue Management Plan
- Issue Tracking List
- Change Control Plan
- Change Control Inventory
- Formal Meetings
- Others

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What Processes Do You Use?

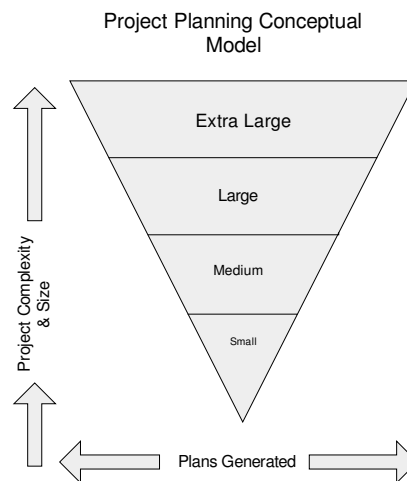
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## The Genesis of "Pragmatic PM"

- A tool we can use...
  - To start with;
  - Based on real experience from real PMs;
  - Backed by sound PM principles.

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## Project Planning Needs Hierarchy



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## The Sad Truth

Too many projects lack the minimum essential planning requirements, such as a charter or schedule... because the PMs either don't know what to do, or think the discipline is too complicated and a waste of time.

*"I can't afford to plan. I have to get going on the project!"*

No kidding!

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## The Simple Key to Success

"Doing something is always better than doing nothing..."

Anonymous

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## 5 Keys to Project Success for Any Project

- Describe the Project – Do you really know what you're doing?
- Build a Project Team – Roles, Responsibilities and Communication
- Make a Plan – What's your schedule?
- Manage the Issues – What about when things don't go right?
- Manage Change – Keeping on target

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## Tool #1: Describe the Project

If you can't describe the project succinctly, you probably aren't sure what you're trying to do and won't be able to tell if you were successful or not.

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## Tool #1: Describe the Project


### What it Can Be

- Something on a napkin
- Nothing more than a list
- What it contains:
  - Short, concise description of what the project is
  - Says why the project is important
  - Defines the product that is generated
  - States the objectives
  - Sets the timeline
  - Defines what success means

### Within Doctrine

- Project Charter
- Scope Statement
- Requirements & Specifications
- Others


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## Tool #2: Build a Project Team

A team can be any size, from two to one hundred, but whatever the size, for the team to be successful, the roles and responsibilities of the team members must be clearly laid out. How the team members are to communicate within the team and with interested parties from outside the team, must be defined.

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## Tool #2: Build a Project Team

### What it Can Be

- Something on a napkin
- Nothing more than a handwritten list of names and jobs
- A short meeting or coffee before work
- A spreadsheet
- A detailed deliverable with many components
- Combinations of the above

### Doctrine

- Project Organization Chart
- Project Charter
- Staffing Management Plan
- Communications Management Plan
- Formal Meetings
- Others

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## Tool #3: Make a Plan

A list of tasks that can be scheduled against a reasonable, realistic timeline, whether that schedule is developed using a sophisticated planning tool such as Microsoft Project, or is written on a napkin.

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## Tool #3: Make a Plan

### What it Can Be

- Something on a napkin
- Nothing more than a handwritten list of dates, times, tasks, assignments
- A spreadsheet
- A detailed deliverable with many components
- MS Project schedule, with resource assignments, constraints, resource leveling, etc., etc., etc.
- Combinations of the above

### Within Doctrine

- Project Plan
- Scope Management Plan
- Change Management Plan
- Work Breakdown Structure
- Project Schedule
- Schedule Management Plan
- Cost Estimates
- Cost Management Plan
- Staffing Management Plan
- Cost Management Plan
- Quality Management Plan
- Communications Management Plan
- Requirements Management Plan
- Risk Management Plan
- Risk Response Plan
- Procurement Management Plan
- Issue Management Plan
- Change Control Plan
- Others

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## Tool #4: Manage the Issues

It is the failure to keep a list of issues -- whether they are new ideas, roadblocks or simple objections – track them to resolution and provide feedback to the originator that causes many projects to fail or be rejected by the user. Identify issues and deal with them early, before they become risks to the project or project acceptance can be threatened.

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## Tool #4: Manage the Issues

### What it Can Be

- Something on a napkin
- Nothing more than a handwritten list
- A spreadsheet
- A detailed deliverable with many components
- Combinations of the above

### Doctrine

- Issue Management Plan
- Issue Tracking List
- Formal Meetings
- Others

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## Tool # 5: Manage Change

- Once a project gets going, it seems like everyone wants to change something. Those useful suggestions are often valuable and warrant consideration, and implementation. Too often, they distract from the original objectives, threaten schedule, and have not effectively been communicated and evaluated by the Project Team prior to implementation. The changes may have their genesis in issues that were raised earlier and not effectively addressed.

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## Tool # 5: Manage Change

### What it Can Be

- Something on a napkin
- Nothing more than a handwritten list
- A spreadsheet
- A detailed deliverable with many components
- Short team meetings
- Combinations of the above

### Doctrine

- Change Control Plan
- Change Control Inventory
- Formal Meetings
- Others

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## A Few Final Notes

- Getting ready for the next project;
- Project Closure & Lessons Learned;
- *A Resource-Baker's Dozen. Subtitle: Recommended Reading:*
  - PMBOK
  - Young, Ralph R. *Project Requirements, A Guide to Best Practices, Management Concepts*, Vienna, VA. 2006.
  - Rose, Kenneth H. PMP. *Project Quality: Why, What and How*. J. Ross Publishing. Boca Raton, FL. 2005
  - Others

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## The Bottom Line

“Doing something is always better than  
doing nothing...”

Anonymous

*“And it’s not that hard. Get your napkin and  
get started.”*

*DP*

**DHP**