



What We *Can Learn* from PROJECT MANAGERS

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CLASSIC PROJECT MANAGEMENT techniques can add to the success of projects and initiatives. We can learn much from these techniques and processes as we think about applying them to a range of projects such as adoption of a content management system, development of a set of documents, or release of a new help system. Here are some of the ideas we cover in this article:

- ▶ Start with the project sponsor and approved project charter
- ▶ Identify critical elements to the project charter
- ▶ Remember to manage by objective
- ▶ Use a project plan

- ▶ Remember inclusion and the perspective of others
- ▶ Understand the project process that includes initiate, plan, execute, monitor and control, and close

The Project Sponsor and Approved Charter

In most settings, success of a project is related to sponsor buy-in. The sponsor will act as your project champion, and without the support of a sponsor, people will not see value in your project. The sponsor is the visionary, and when you have roadblocks, which you mostly likely will, the project sponsor can guide you through the traffic

and open the lane for you to go through. Once you have a sponsor, develop a project charter to get official approval for the project.

In developing the project charter, follow these guidelines to maximize your chances for success:

1. Identify the project stakeholders. Typically these are the executives of the departments the project will impact.
2. Form the project steering committee from the project stakeholders. These are the leaders in the areas that will be impacted by the project.
3. Contact the stakeholders to ask for their approval and to add members of their departments to the planning and implementation team.
 - a. Share the draft of the project charter, especially the scope of the project, budget, proposed timeline, and the defined roles of suggested planning and implementation team members. This allows the stakeholders to see how their staff will be used, and by suggesting team members, you have some input into who will work with you.
 - b. If you do not know which staff you need, call the supervisors and ask for their input. The inquiry call before an email (the meeting before the meeting) is a technique that works well in many settings.
 - c. The project sponsor could be asked for his/her opinion as to which stakeholders and team members might be useful on the project as a starting basis in forming the steering committee and planning and implementation team.

Critical elements in working with the project charter include the following:

1. Ask the stakeholders to name and approve the project planning and implementation team members, who are usually their direct reports. In most businesses and academic institutions, the management style is mostly hierarchical, or top down, and if you ask for the input of executives as you build your team, you will have much more stakeholder and team buy-in.
2. Allow the project planning and implementation team members to have a say in defining the roles they will play on the team, since the charter is a contract between the team and the steering committee.
3. Provide some preliminary budget information when you present your project charter, to show what the project will cost and how it will be funded.
4. Identify a target project timeline with some milestones.

The most important part of the project charter is the scope statement. A well-defined statement of what is in scope and what is out of scope will keep the project focused, help prevent scope creep, and set appropriate and realistic expectations for the project stakeholders and sponsor.

One thing that can keep a project from being completed on time is scope creep. An agreed-upon, focused scope statement in the approved project charter and a realistic timeline should lead to a successful project. Remember, the

project charter is a contract between the project team and the steering committee.

How does one define a successful project? The triple constraint as shown in the Project Management Triangle in Figure 1 applies here:

- ▶ The project scope is well defined.
- ▶ The product deliverable meets the elements of the project scope.
- ▶ The project is on time and within budget.

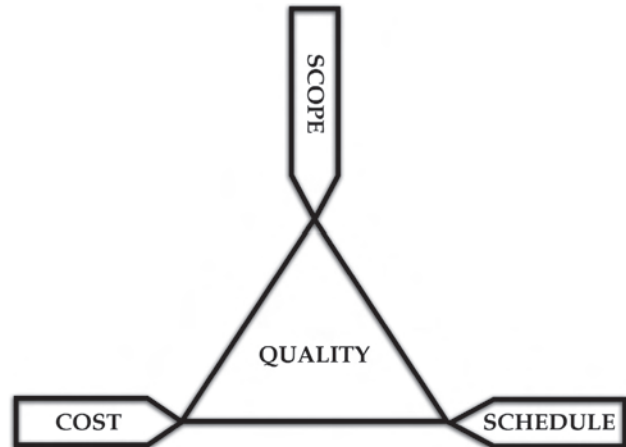


Figure 1. The Project Management Triangle (adapted from the Wikipedia entry for Project Management)

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Management by Objective

Here are some guidelines on how to manage by objective, a concept that will help make your outcome successful.

1. Establish clear and realistic objectives to develop your scope statement. SMART—Specific, Measureable, Attainable, Realistic, Timely—objectives should apply here.
2. Periodically evaluate whether objectives are being met. The project manager should provide an executive summary to the project sponsor and project team biweekly or monthly, and more often closer to the launch of the project. On larger projects, the team should meet weekly before launch, always referring back to the project plan.
3. Implement corrective action when a problem arises.

Project Plan

Some steps in the process of using a project plan are:

1. The project manager sets up a preliminary project plan and schedule with high-level milestones.
2. The plan reflects the organization's work calendar—for example, the fiscal year, holidays, closings.
3. The preliminary project plan is presented to the planning and implementation team.
4. Once the milestones are approved by the team, the project manager and the project team create the detailed project plan of tasks that make up the project milestones (the work breakdown structure).

5. Team members treat the project plan as a living document that will change as more information becomes available and more tasks are outlined. The milestones, however, should not move too much, only within the slack built into the project plan, or the deadlines will slip.

Inclusion

In both corporate and academic settings, it is important to be collegial and include all parties that would be impacted by the results of the project. The most successful projects are those where the work includes the perspectives of everyone who might touch the project or use the deliverable. A project is worthless if the end users of the product or service choose not to use it because the deliverable does not suit their needs.

Project Process

Here are the steps in classic project management as we use them, as adapted from the PMBOK Guide. Use these proven methods to maximize the chances that your project will succeed.

Initiate

1. Select a project manager
2. Divide large projects into phases
3. Determine project objectives
4. Document assumptions and constraints
5. Develop project charter
6. Develop preliminary project scope statement

Plan

1. Create project scope statement
2. Determine team
3. Create work breakdown structure (WBS)
4. Create activity list
5. Estimate resource requirements
6. Determine metrics
7. Estimate time and cost
8. Develop schedule
9. Determine roles and responsibility
10. Identify risk
11. Prepare procurement documents
12. Gain formal approval

Execute

1. Finalize team
2. Execute plan
3. Recommend changes and corrective action
4. Follow processes
5. Conduct team building
6. Schedule progress meetings
7. Select sellers (vendors)

Monitor and Control

1. Assess team against performance measurement baselines
2. Measure according to project plan
3. Determine variance and need for corrective action
4. Verify scope and check for scope creep
5. Integrate change control
6. Perform risk audits
7. Manage reserves
8. Use issue logs
9. Facilitate conflict resolution
10. Measure team member performance
11. Report on performance
12. Create forecasts
13. Administer contracts

Close

1. Develop closure procedures
2. Complete contract closures
3. Confirm work was completed per requirements
4. Gain formal acceptance of product
5. Provide a project “post-mortem”
6. Complete final performance reporting
7. Index and archive records
8. Update “lessons learned” knowledge base
9. Hand off completed product
10. Release resources **i**

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REFERENCE

PMBOK Guide, 3rd ed. Newton Square, PA: Project Management Institute.