



Pfeiffer

Essential resources for training and HR professionals

LOU RUSSELL

# MANAGING PROJECTS

A Practical Guide for Learning Professionals

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# More Praise for *Managing Projects*

“Successfully managing projects takes more than good task- and time-management skills. In *Managing Projects*, Lou Russell discusses the all-important role that influencing plays in getting things done—on time, on spec, and on budget—and weaves this into a rock-solid walkthrough of the principal steps of a project. This is a must-read for anyone with project responsibility—in other words, everyone.”

— **Martin Delahoussaye, vice president publishing,  
HRDQ**

“The book converts the usually boring and intimidating world of project management into easy steps and practical approaches. The ideas are useful and immediately applicable.”

— **Ray Jimenez, PhD, Vignettes Learning**

“Lou Russell is the perfect expert on project management productivity and engagement to write this substantive book. Whether you are a fledgling project manager or a twenty-year veteran, this book will give you the tools to help you manage through constraints and communication. I highly recommend her work.”

— **Teresa Conroy-Roth, senior vice president,  
Technology Partnership Group, Inc.**

“Workload, complexity, and pressure have increased dramatically. For companies to achieve their strategic goals all staff must be competent in basic project management. Lou's book provides just enough to build a baseline but not so much that it overwhelms.”

**— Jane Niederberger, former senior vice president and chief information officer, Anthem Inc.; former vice president operations, WellPoint; investor and consultant, Healthcare Technology and Operations, Neiderberger Ventures, Inc.**

“Anyone who feels overloaded and distracted will benefit from Lou's new book, *Managing Projects*. Lou's book provides hands-on tools to sort through the complexity of a work world that is constantly changing and understaffed. Today's world requires different project-management skills than even five years ago. Thank you, Lou, for this easy-to-read update!”

**— Karen Valencic, Spiral Impact**

“In *Managing Projects*, Lou Russell takes you through a practical journey of immediate project management implementation. She structured the book in a unique fashion, in which I was able to learn, reflect, and implement the principles of project management then and there. Very useful and clever.”

**— Maha Khatib, principal, Learnactive, Dubai**

“If it suddenly seems like you are in charge of *everything* and even multitasking at the speed of light isn't cutting through the chaos, Lou's book helps you rein in the madness and complete more projects with less help, time, and money. You'll learn how to give up control and actually start managing things so you can finally end the day feeling like you've accomplished something.”

**— Leah Nelson, senior conference program manager, Training magazine Events**

“Among those things you can count on are death, taxes, and Lou Russell's ability to transform complex ideas into interesting and immediately usable insights. *Managing Projects* is yet another example of Lou's gift of making even the most mundane and tedious aspects of project

management a captivating and enlightening read. If you spend any of your time trying to run a project you'd be crazy not to invest the time in reading this book.”

— **Dan Brandon, associate director, Financial Services Industry**

“Lou Russell demystifies project management with simple yet incredibly effective steps and tools that any project manager can understand and use. Lou provides a good dose of team building to the process that gets everyone on board ... and in most cases that has been the missing element.”

— **Deb George, The Children's Museum of Indianapolis**

“This book should be titled *The Missing Links of Managing Projects*. From her deep understanding and project management experience, Lou Russell shares unique insights on often overlooked yet highly critical issues that greatly impact the outcomes of our initiatives. An essential volume that will benefit project managers at every level.”

— **Gary VanAntwerp, vice president, Implementation, Training magazine Network, SMMConnect, VFTNetworks**

“In Chapter One of *Managing Projects*, Lou Russell contends that ‘project management is ... a required competency for all business workers.’ I couldn't agree more, and there is no greater blessing to the full-time, professional project manager than leading a team made up of individuals with an understanding and competency in project management. Lou's accessible approach to project management makes that ideal closer to reality.”

— **Kevin Weston, vice president, IT Planning, OneAmerica companies**



*“Managing Projects* is a practical and relevant book for anyone engaged in today's crazy work world. Lou describes the situation facing us so accurately I felt like she must have been following me around! Finally, I now have a guide to help me manage the chaos and feel good about myself in the process.”

— **Lori Miller, alumna, Lou's Project Management certificate program**

# About This Book

# **Why is this book important?**

There are three forces combining to create an unmanageable workload and work life for people: staffing, technology, and fear. Reduced staff in the workplace means that most people are asked to juggle multiple jobs that were previously done by other people. People are universally juggling multiple projects while playing multiple roles, all while doing their real job. Technology helps us work more quickly, but it follows us 24/7, triggering constant interruption and driving inefficient multitasking. Fear is rampant because layoffs are continuing, and it is evident that each of us can only scale so far before we break. Fear drives stress, which drives poor-quality projects. This book helps clarify how these three factors drive unreasonable project expectations, poor quality, and constant rework, which in turn increases fear. It's a negative reinforcing loop. To escape this new triple constraint requires that we bite the bullet and change the way we do projects.

# **What can you achieve with this book?**

First, this book challenges the way you look at your workload. You will learn quick, simple ways to work on the most important projects while keeping your interruptions at bay. Next, this book helps you communicate with others more effectively through a 30-minute Project Charter, creating realistic expectations when a project starts and facilitating bad news early—when you can still do something

about it. Then, as you plan and manage each of your projects, you'll learn how to influence others and manage yourself so that the stress doesn't destroy your ability to adapt. Finally, you'll learn how to take small bits of time to capture lessons learned and grow your own ability to manage a flexible structure on every project. Best of all, at least a couple of times a week, you will leave work feeling like you actually accomplished something.

# **How is this book organized?**

You can approach this book in different ways. If you are on a project right now and you have a specific question about how to manage a particular issue, you can skip right to Chapters 2 (Define), 3 (Plan), 4 (Manage), or 5 (Review) and find tools and techniques that are immediately applicable. If you are new to project management, focus on Chapters 2-5 for a primer that gets you through the entire project management process. Do a project while reading these chapters for maximum value. If you are a more experienced project manager, consider skimming Chapters 2-5 and focusing on Chapters 6-7 to grow your ability to manage a portfolio of projects for your organization. Finally, Chapter 8 is designed to celebrate your success and review the whole book. You can start there if you'd like, wait until the end, or save it for a rainy day.

## About Pfeiffer

Pfeiffer serves the professional development and hands-on resource needs of training and human resource practitioners and gives them products to do their jobs better. We deliver proven ideas and solutions from experts in HR development and HR management, and we offer effective and customizable tools to improve workplace performance. From novice to seasoned professional, Pfeiffer is the source you can trust to make yourself and your organization more successful.



**Essential Knowledge** Pfeiffer produces insightful, practical, and comprehensive materials on topics that matter the most to training and HR professionals. Our Essential Knowledge resources translate the expertise of seasoned professionals into practical, how-to guidance on critical workplace issues and problems. These resources are supported by case studies, worksheets, and job aids and are frequently supplemented with CD-ROMs, websites, and other means of making the content easier to read, understand, and use.



**Essential Tools** Pfeiffer's Essential Tools resources save time and expense by offering proven, ready-to-use materials—including exercises, activities, games, instruments, and assessments—for use during a training or team-learning event. These resources are frequently offered in looseleaf or CD-ROM format to facilitate copying and customization of the material.

Pfeiffer also recognizes the remarkable power of new technologies in expanding the reach and effectiveness of training. While e-hype has often created whizbang solutions in search of a problem, we are dedicated to bringing convenience and enhancements to proven training solutions. All our e-tools comply with rigorous functionality standards. The most appropriate technology wrapped around essential content yields the perfect solution for today's on-the-go trainers and human resource professionals.



*Essential resources for training and HR professionals*

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# Managing Projects

A Practical Guide for Learning  
Professionals

**Lou Russell**

President, Russell Martin & Associates

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# Preface

I am a shiny object person. I really like working on new things, and I'm not very good at finishing things up, including this book (special thanks to Matt Holt, Pfeiffer acquisition editor extraordinaire, for his infinite patience). I consider myself a very creative person, and love discussing new ideas. It became evident to me as I started my own consulting business over 25 years ago that I was going to have to figure out a discipline that would help me successfully juggle and finish multiple projects.

As a beginning programmer at AT&T in the late 1970s, I had project management procedures (they were called BSPs, for Bell Systems Practices) that were so detailed they specified how many wastebaskets and ashtrays you would need for your project. Times have seriously changed. In those days, projects were done by dedicated teams with one dedicated project manager. Today, I am juggling multiple projects (not unlike you, I'm sure) with a highly matrixed group of stakeholders, most of whom do not report to me in any formal capacity.

That's not the only thing that has changed since my days at AT&T. For example, I once worked on a project where I was told to first research the requirements and then, when I was all finished, to tell the business area the project was done. In other words, I had all the time I needed, no matter what happened along the way. Today, I might get a call with a brief description of the project and a due date; I work backward, not forward.

The project management methods and techniques you will read about in this book reflect the "I need it now" nature of the world you and I live in. We don't have time for 100 pages of proper project management process. We need to

be adaptable and agile. Every day we must be prepared to completely adapt to new or changing needs. This book represents what I believe to be an easier and more realistic way to approach project management.

I have arranged the book in two parts. The first part (Chapters 1-5) provides all the techniques you need to define, plan, manage, and review a project. The second part (Chapters 6-8) shows you how to manage the people side of a project, including how to deal with change and its impact on others in your organization; and how to influence unruly stakeholders and create organizational dashboards.

## **Hard and Soft Skills in One Book**

One of the most exciting aspects of this book is that it is really two books in one. For the first time, I am able to offer you two sets of skills: the “hard skills” of following a project management process in order to successfully manage your project; and at the same time, the “soft skills” (which are often “harder”!) of managing the people who participate in a project as well as those who are impacted by it.

I hope that you will use this book not only to manage your projects more efficiently so that you save both time and money, but also to improve the quality of your life. After all, you and likely everyone you know are working far too many hours under far too much stress. Many employees feel they are being held hostage to their job. Perhaps your being smarter about how you manage projects will help your organization see you as the valuable asset you really are. Use these techniques then to take care of yourself and your family. As I like to say to those who take my classes, “Insanity is just a project constraint.” You shouldn't take any

of what goes on around you too personally; just learn to adapt, laugh, and move on.

Special thanks to my family for their support in everything I do. Thanks to my husband, Doug, for rushing to the store and buying me a new power cable for my laptop when I left one in New Jersey. I just left the new one in Minnesota as well ... sigh. He tries very hard to take care of me, but the shiny objects can still attract me and are my undoing.

Special thanks to my beautiful and talented daughters, Kelly, Kristin, and Katherine. Kelly has graduated and has a real job, and is learning her own project management. It's fun to watch. Kristin and Katherine are juggling academics and sports like pros. I'm proud of them all.

Thanks also to Brittney Tiemann, my project manager, business development manager, and at the moment my whole staff. She was a miracle find after the recession rebooted my business, and I owe a lot to her.

Thanks to Mark Morrow, the “msfixer,” who helped me stay true to my voice. And thanks to all the students who have helped me evolve these ideas and taught me much more than I have taught them.

## **Let's Get Going**

In this book, I share a simple, visual, and practical way to manage your projects. I also share some ideas with you at the end of the book for joining with others in your organization to adopt a project management approach together. In these tough times, a business cannot survive unless its limited resources (and you are one of these) are aligned with the most important work. The chapters ahead will help you do the following:

### **Chapter 2: Define**

*Why* is the enterprise spending money on my project instead of something else?

### **Chapter 3: Plan**

*How* are we going to get this project done?

### **Chapter 4: Manage**

*Adapt* to the project reality

### **Chapter 5: Review**

*Learn* how to improve project management capacity

### **Chapter 6: Organizational Change**

*Navigate* the pushback as your project introduces a New World

### **Chapter 7: Organizational Project Management**

*Grow* a repeatable process for project management and establishing project mentoring

### **Chapter 8: Insanity Is Just a Project Constraint**

Now that you're organized, how will you stay that way?

You can certainly use this book as a reference guide, jumping to a tool you need in a project emergency. I'd recommend a different approach if you are expecting to get lasting improvement from this book. This is a real *hands-on* book that gives you the opportunity to learn while you do. So, if you'd like to "jump right in," then I'd suggest reading Chapters 2 and 3 and trying the techniques on a project you're currently working on. Then read Chapter 4 right before you kick off the project. Read Chapter 5 just as you are finishing up the project.

Chapter 6 will help you when your project stakeholders are driving you crazy—I mean to the point where you want to throw up your hands because you just "don't think you can stand it anymore." Reading this chapter will help you put these stakeholders' behavior in perspective and see their behavior as admittedly irritating but actually very normal.