LOU RUSSELL

MANAGING PROJECTS

A Practical Guide for Learning Professionals

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.

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Essential resources for training and HR professionals

Managing Projects

A Practical Guide for Learning
Professionals

Lou Russell

President, Russell Martin & Associates

CONTENTS

LIST OF EXHIBITS

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 others 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. This shift in attitude and mindset will help you react more effectively and reduce your stress level.

Chapter 7 is designed to help you create a common language and shared process/documentation strategy. I provide this information because once everyone in your organization notices that your projects are a lot more organized than everyone else's, you are likely to be very popular. So this chapter sets you up to become the project management guru of sorts.

Chapter 8 is my final shot at encouraging you to take your life back. Maybe put a Post-it at the start of this brief chapter so you can read it whenever you're feeling overwhelmed. It will give you a little laugh and get you back into the trenches. It's all about adapting.

ADVICE AT THE START

Think about major changes you had to make in your life, such as choosing to have children, getting married, or changing jobs. Each transition made you nervous about the decision but excited about how it would improve your life. In most cases (I hope), your life was improved a great deal, transformed forever, in fact. However, making these changes was not easy and was likely full of bumps, dragons, surprises, insanity, and trials and tribulations. Still, the blessings and opportunities you received were almost always worth the bumpy and often frightening ride.

You will likely face the same dynamic as you take this step to improve your ability to manage projects.

Think about how many times you leave work frustrated that you were unable to finish the things you'd planned to get done that day. Even worse, you discover that the day has added new things to your list, which was already too long. Each day may just seem impossible. Relax. You are not alone. Here are some recent frustrations shared by my workshop students:

- It seems impossible to check anything off. There is always some part of a project or task that's not quite done or a person who hasn't done what they said they would do. Everything on the list seems to stay an open issue forever.

- Email, social media, and all digital communication are overwhelming. It takes hours each day to keep from drowning entirely under the weight of all the help others need from you.

- No one helps. Worse, no one does what they say they'd do or promised, and no one delivers anything when they said they would deliver it.

- There is no time to be strategic. All I seem to do is put out "fires."

- There aren't enough people to do the work, so I am currently juggling the project workload of multiple people. It's hard to keep it all straight when I'm constantly jumping between projects, and I'm usually doing this juggling act through emails.

- If I make a fuss, I'll be the first name on the next layoff list.

- I've compromised my health and sacrificed time with my family to juggle this insane workload.

- I am past being scalable. I am painfully aware of the lack of quality in my work and I'm drowning in the rework caused by all this juggling.

This list may express the pain that prompted you to open this book. If not, make a note in the margin of what you'd like to change in your workload and life. Life is what good project management is all about. If we can prioritize and manage the important things while saying no to the less important things, we can have success, and so can the businesses we work for.

September 2011   Lou Russell

Start Well to End Well

"Bad News early is Good News." — Steve McNamara

In this chapter:

- How to really do more (projects) with less (help, money, time)
- Why project management is not too hard or academic for you to use every day
- Using PMI's methodologies and other project management methods
- How to feel like you've accomplished something at the end of each day
- How to stop trying to *control* and start *managing*
- How to establish the partnerships required for projects to be successful

In today's chaotic business climate, multitasking is the norm. Jobs have been trimmed, and companies are doing more with less. Roles and responsibilities cannot be defined clearly enough to adapt to the work responsibilities required to flex with the chaos. No one is accountable, except you of course. People are juggling multiple projects and often acting as the project manager for a team of one.

Lou's Project Management Diary

As part of a recent study conducted by Towers Perrin and the researchers of Gang & Gang, a randomly selected group of 1,100 employees and 300 senior human resource executives working for midsized and large-sized companies in the United States and Canada was surveyed. Participants were asked to describe their feelings about their current work. The study captured participants' spontaneous emotional responses about the total work experience. The study determined a set of reasons for workplace negativity. Here are the top five:

- An excessive workload
- Concerns about management's ability to lead the company forward successfully
- Anxiety about the future, particularly longer-term jobs, income, and retirement security
- Lack of challenge in their work; boredom that intensifies existing frustration about workload
- Insufficient recognition (including salary) for performance, contribution, and effort

Think about a project that you are on right now. Use Sidebar 1.1 to think about your project experiences.

The negative emotion is an uncomfortable place in your mind, but I'd like you to stay there for a moment so you can learn more about your current project management competence. If you are like many of my learners, you have written down the word "frustration" or "stress," or something like that. Overall, 80 percent of the learners in our classes list one of these two words when they do this exercise. As a mini-snapshot of current work, the thought

that 80 percent of workers are stressed out is not a positive sign. When we are in an almost constant state of frustration, we don't make good decisions, and our projects struggle.

Let's look at some of the other potential triggers. Your list may include:

- People who aren't accountable
- People who won't deliver on or meet their promised deadlines
- Not enough time
- No executive support
- Unreasonable budgets
- Internal political battles that have nothing to do with the project
- Stakeholders continually changing the scope of the project
- No help

Then, many of our students share the impact of this emotional state on their personal life. These impacts include:

- Limited time and energy for families
- Health issues
- The threat of unemployment due to project failure

> **Sidebar 1.1**
>
> **Emotions Exercise**
>
> Take a minute to write down responses to the following on a piece of scrap paper:
>
> - What is a negative emotion you have experienced on this project?
> - How intense (1 = low, 10 = high) was this emotion?
> - What were a few of the events that triggered this emotion?
> - What is a positive emotion you have experienced on this project?
> - How intense (1 = low, 10 = high) was this emotion?
> - What were a few of the events that triggered this emotion?

In this book, you will learn how to respond to these triggers with preemptive strikes. You will also learn how to recognize when you're lying to yourself, thus creating some of the very stress-inducing triggers you blame on others. Project success through good project management is all about communication with yourself and others. Projects break down during phase transitions and hand-offs—and in large measure due to self-deception.

Return to the positive emotion you wrote about in Sidebar 1.1. The positive emotions tend to be more diverse, which makes sense because what motivates