

Five Things You Can Implement Now for Better Project Management in Your Organization

(and a Sixth for Good Measure!)

Do you want to increase your rate of project success, but are unsure of where to start? While project management is a large and growing discipline, at Schedule Associates we're confident that by doing a good job in these six areas you'll see a significant and rapid improvement in the rate of project success within your organization.

- 1) **Project Phases and Gates**—Define and start using pre-defined phases and gates (also called “checkpoints” or “toll booths”) through which all projects in the organization must pass. Collectively these define the project lifecycle of projects in your organization and typically there are five to seven of these phases for each project. For example, phases might be Concept, Feasibility, Requirements Definition, Design, Verification, Implementation, and Closure. Define phases that make sense for your type of projects and your organization.

Gates are points at the end of each phase at which the project team must demonstrate that they've accomplished the desired project objectives, that the requested deliverables have been provided, before they are given the go-ahead (and the corresponding funding and resources) to move into the next phase of the project. Gates provide natural points for making mid-course corrections to projects and even for terminating projects that no longer make good sense.

Gates are also ways of clearly establishing and communicating expectations for the project and for holding those responsible to them. In addition, they're great ways of motivating team members to accomplish objectives in that they provide a milestone to shoot for that falls prior to the end of the project.

Finally, if you're striving to get projects managed in a consistent manner throughout the organization, implementing phases and gates is one of the fastest and most efficient ways of doing that.

- 2) **Project Charters**—A project charter is a document used to spell out the project manager's authority to get the project done as well as any limitations on that authority. It's a way of overcoming the “I have all of the responsibility and none of the authority”-syndrome. The charter should address budgetary responsibility in terms of what leeway the project manager has to make purchases and procure services. It should include a definition of his or her ability to procure resources for the project. Can they procure resources internally as needed? Do they have

authority to outsource or even hire outside of the organization in order to complete the project? It will also denote the project manager's ability to make decisions about what is and isn't included in the scope of the project.

Along with the definition of the project manager's authority, the charter also clarifies limitations on that authority, constraints within which the project manager must operate.

The charter is also an excellent document for defining the expectations for how the project manager should keep stakeholders apprised of the project's status and the actions that should be taken in the event that the project falls off its plan.

In addition to clarifying the project manager's role, the charter is an opportunity to get managers to agree on the high-level definition of the project and the project manager's responsibility. Having managers sign the charter ensures there's a high-level consensus among the management team about the project and the project manager's role in it.

- 3) **Project Scope Definition**—It's impossible to plan and execute a successful project if it's not clear what that project is. One of the first and most vital steps in planning a project is defining what's included within the scope of the project. Surprisingly, this step of the project management process is often glossed over resulting in subsequent problems down the road.

The project's scope should be such that when it's complete, when those tasks have been done, the goals for the project are achieved. After you've defined the project scope ask yourself, "If we do these things will we accomplish our objectives for the project?"

Equally important to defining what's included in the project is identifying those things that are not included within the project's scope. This is often the source of misunderstandings, typically in which stakeholders thought more was going to be delivered than actually was, and these sorts of expectations are best identified and managed early in the project's life.

Project managers have a well-accepted way of documenting the project scope in something called the "work breakdown structure" or "WBS." A well-crafted WBS is the cornerstone on which most of the project planning is built. Without a good WBS, estimates of resource utilization, schedule, and required financing for the project are likely to be inaccurate.

- 4) **Change Management**—Even the best-laid project plans aren't likely to capture all of what's bound to happen as the project progresses. In today's world of rapidly changing technology, shifting political landscapes and dynamic business environments the one thing we can be sure of is that things will change as the project is underway. A documented change management process outlines how those changes will be dealt with over the course of the project.

The change management process typically includes information on how changes are to be submitted to the project team, who may submit those changes, how they will be prioritized, and who reviews and ultimately makes decisions regarding the implementation of those change requests. For those working with external clients, the change management process may address how changes are to be paid for. This is important if the project manager isn't going to get trapped into performing additional scope with the same budget and staffing levels, something commonly called "scope creep."

The change management process should be documented and shared with project stakeholders at the outset of the project so that it's clear how change will be managed once the project is underway and what people's roles are in the process.

Change management allows us to accomplish project objectives and ultimately, to satisfy the customer while remaining open to opportunities and changes that inevitably will surface during the course of the project.

- 5) **Risk Management**—Some say that this is where it all starts, that we should understand risks to the project prior to undertaking additional project planning. Without a doubt, risk is an important element of all projects and needs to be an integral consideration when assembling the project plan.

While there's a fair amount of both art and science to risk management, coping with risk essentially involves asking two questions. "What are the risks that might affect our project?" and "What are we going to do in response to those risks?" Through this proactive process we're able to identify those activities that are most likely to help us stay on plan even when risks occur, and we're doing this before those risks occur. That's key. Only by performing risk planning at the beginning of the project do we have the resources, time and alternate plans at the ready to deal with risks when they occur during the project.

- 6) **Requirements Definition**—Unfortunately, there are many examples of unsuccessful projects in the world; projects that didn't finish on schedule, didn't live within their budget, and/or didn't deliver the desired scope at the requested quality levels. Upon investigation many of these problems have been traced to inadequate requirements management. Requirements weren't collected at the beginning of the project or were incomplete, they changed over the life of the project or, project work wasn't mapped back to the original requirements to ensure that requirements were being fulfilled as a result of the work being done on the project.

It's unlikely that a project will be successfully completed if the requirements to be fulfilled by the project's output, whether that output is a product or service, aren't understood. Thus, one of the first steps in requirements management is understanding and documenting what the requirements are for the project's deliverable. The project scope can then be defined so as to fulfill these requirements.

When assembling a project plan ask yourself, "Do we know what we're shooting for here?" and if not, "Do we have plans in place to determine what it is the project should deliver?" By defining the requirements for the project's deliverable we're providing a target for the project team to shoot for and a definition of what constitutes success on the project.

From those of us at Schedule Associates, best of luck with your project management improvements!