

A Practical Approach to Project Management

5 Key Steps to Maximizing Efficiencies, Boosting Employee Morale and Achieving Greater Project Success

PROJECT MANAGEMENT SUCCESS – MAKING GOOD PROGRESS, RELATIVELY SPEAKING

In 1994, The Standish Group – a research firm specializing in project management – published a seminal report entitled *CHAOS*, which has become the de facto standard and definitive source in project management benchmarking. The focus of the report was to identify the scope of software project failures, the major factors that cause software projects to fail and the key ingredients that can reduce project failures. The data and information within the *CHAOS* report has been updated on a regular basis since the original report was published, and a longitudinal perspective of the

Project Outcome	1994	2004
Failed/Cancelled	31%	15%
Finished Successfully	16%	34%
Challenged	53%	51%

When considering the progress that has been made within the discipline of project management, there are certainly reasons to be encouraged. The amount of projects cancelled over the ten-year time span dropped by 16 percent, while the amount of projects finished successfully rose by 18 percent.

Part of the reason for this reported success is that project management processes within organizations have been greatly refined over time, which has been due in large part to the work of the Project Management Institute (PMI). PMI's *PMBOK®* Guide has become the standard and definitive authority within the project management discipline, and many companies subscribe to the standards defined within its pages (including Systemation – all training materials are PMI-compliant).

There are also reasons for continued optimism when looking ahead. While project management training budgets thinned out slightly between 2002-2005 due to a variety of factors including a slowing economy and cost-cutting measures, they are much more plentiful today and growing. Project managers are being trained again – even some coaching is being offered. And individuals are not only getting formal coaching, there are quite a few mentoring programs being developed that allow individuals to go back to knowledgeable, trusted sources that can help them get better along their growth path to project management maturity.

But think for a moment – are all these positive discussions a bunch of sound and fury, signifying nothing? In other words, has the project management discipline as a whole really made much progress over the years? If so, is it acceptable progress?

RUNNING IN PLACE

“Progress is like a merry-go-round. We get up on a speckled wooden horse an’ th’ mechanical pianny plays a chune an’ away we go, hollerin’. We think we’re thravvelin’ like th’ divvle but th’ man that doesn’t care about merry-go-rounds knows that we will come back where we were.”

-Finley Peter Dunne

If the project management industry is proud, even a little giddy, about the above statistics from The Standish Group, it has a funny way of assessing things. After all, a 34 percent success rate is no great shakes. Yet practitioners and managers alike seem to be content with it, patting themselves on the back and getting on their high horses about the great strides that have been made over the years.

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In reality, they're stuck on a project management merry-go-round; running in circles with heads spinning, trying to make greater progress with the many of the same techniques. Many seem to be hoping that variations on the same theme will somehow make the carousel stop moving in circles and they'll actually get somewhere. Or, as Standish posits in its original *CHAOS* report, part of the blame might be laid at the doorstep of the fast moving business environment, or possibly project managers' inclinations to cover failures up, ignore them or rationalize them, which only dooms them to making the same mistakes over and over again. In other words, they're stuck on a project management merry-go-round.

Unfortunately, those pulling the purse strings, mostly high level managers who haven't had the benefit of drinking the same project management Kool-Aid, don't seem to share the industry's somewhat skewed sense of accomplishment. Over the decades, Systemation has spent hundreds of hours speaking with executives in all types of Fortune 1,000 companies, from Verizon and Barclays Bank to Travelers and Bridgestone. When assessing their expectations for project performance, following is what Systemation has found that they, in general, want to see:

- 0% variance on the scope
- Less than 10% variance on schedule
- Less than 10% variance on budget

Sound unrealistic? Maybe, but spending too much time lamenting about pie-in-the-sky expectations misses the point. The real issue is what is being done, at both the individual and organization levels, to try and attain higher levels of success and meet expectations of those who ultimately fund projects.

PMI has done a valiant job moving the industry forward with its *PMBOK Guide* over the years, but even that seems to have reached a point of diminishing returns. The latest version of the *PMBOK Guide* seems to deal less about actual process than it does about semantics. And when it gets to the level of name changing, not much real value is being added. Current project management processes are fairly mature, and are apparently about as tight as they are going to get.

What, then, is being done wrong, and what can be done to improve project management success rates? What are the people who are actually seeing substantial progress and experiencing real success doing differently than those who fail or simply tread water? Are they more disciplined? Have they instilled more process? Are they better trained? Perhaps, but when one looks at how these individuals are achieving above average success rates, there is something bigger going on.

A FRESH, PRACTICAL APPROACH TO PROJECT MANAGEMENT

Many assume that because major Fortune 1,000 companies are successful in many aspects of business, they must have project management down pat. Breaking news – they struggle with it just as much as anyone. In fact, Systemation often finds that some of the other lesser known, sometimes smaller companies are higher up on the project management maturity ladder than the bigger players are. Systemation has also uncovered some of the secrets they have employed that have gotten them there.

This paper will share those secrets, and will offer some fresh perspectives on how everyone can go about achieving greater success in project management. What it will really offer is a practical approach to project management.

THE REAL ROOTS OF THE PROBLEM

Core problems occur at both the individual and organizational levels. Much is made of how to improve the performance of project managers, but maybe too little is made of the importance that corporate culture and organizational processes have on the overall success of projects. But project managers need to look at the big picture as well as how day-to-day improvements can be made, just as the mariner must have his eye on the sand and rocks as well as on the North Star.

To that end, this paper outlines problems and recommended solutions at both levels, and hence the structure of this discussion will be guided by the following practical equation:

Individual Behavior + Organizational Process = Business Results

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Individual Behavior

Not all project managers are created equal.

Most managers within organizations tend to see all project managers as having the same basic skill levels, and as a result equal expectations are placed on everyone as well. But all project managers are not created equal. According to Daniel H. Kim in “*Leveraging Competence to Build Organizational Capability*”, individuals move through at least five separate stages when acquiring a new skill: Novice, Advanced Beginner, Competent, Proficient and Expert. Each stage reflects different levels of skill competency:

Novice

- *Is aware of abstract concepts and ideas.*
- *Has little or no ability to put ideas into practice in a reliable way.*
- *Requires context-free steps in order to move forward.*

Advanced Beginner

- *Reliably follows the prescribed steps, provided the situation closely matches ones they have previously encountered.*
- *Has considerable experience coping in real-life settings.*
- *Has a deeper appreciation for the subject area and acknowledges his/her own lack of knowledge about the discipline.*

Competent

- *Is able to go beyond simply applying rule-bound procedures in highly structured settings.*
- *Begins internalizing the new tools and concepts.*
- *Has received all the knowledge there is to know about the skill.*

Proficient

- *Reliably applies the tools and principles to any situation in a highly flexible and fluid manner.*
- *Has internalized all the tools and concepts.*
- *Continues to grow only from direct experience gained by continual practice in diverse settings.*

Expert

- *Enmeshes with their environment.*
- *Acts based on practiced understanding and intuition.*
- *Advances in the field through direct interaction with other experts.*

Whether an organization follows the above taxonomy or some other classification scheme, the fact remains that project manager maturity runs the gamut. Treating everyone as equals is counterproductive, and leads to limited investment in the project management maturation process. When all project managers are viewed as equals, it becomes easy to be blinded to the fact that most of them actually need help if they are to live up to presumed performance levels. Such a mindset severely limits an organization’s commitment to growth and education among its project management teams, and therefore overall project success is severely limited.

A Constant State of Flux

Systemation has conducted hundreds of pre-assessments to gauge competencies in three key areas: skills, aptitudes and knowledge. Of these three areas, it has been found that aptitude is usually the key indicator of success, which includes the innate things that make people great project managers such as good people skills, being detailed-oriented, creativity, systematic predispositions and an ability to see the big picture. People can be trained to improve in these areas, but some are more predisposed than others to excel at them. In other words, some of it is out of managers’ control.

As one might expect, individuals that score high in all three categories tend to stay in their positions for much shorter periods of time than those that don’t sweep the board. Shining stars usually get promoted higher in organizations, usually to management positions. The unfortunate consequence is that organizations never enjoy the strongest possible project management base for any extended period of time.

Burnout is another contributing factor to a project team’s constant state of flux. The interminable deadlines that characterize and define the role can be exhausting. Over time, the frenetic pace and pressure of constant deadlines can simply wear project managers down. As a result, there is a lot of internal churn. In fact, project management turnover rates average an astounding 30-40 percent per year, and project managers’ careers last less than a decade. Project managers either switch jobs or change careers, leaving project management teams in a constant state of flux and making it extremely hard to maintain any semblance of project management maturity.

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This unique dynamic means that project teams are constantly getting “diluted” and need to be rebuilt. And the more change inherent within a team or organization, the more knowing what is expected becomes a dark mystery to all newcomers. Unless an organization is very good about documenting process and expectations, and very, very few are, then the ability to grasp and understand expectations begins to diminish. This leaves everyone to define their own measures of success and expectations. And as The Standish Group correctly points out, project managers then resort to hiding outcomes that they perceive to be bad, and only show the results believed to be good.

For example, when reporting gets sent up the management chain, it gets massaged at every stage based on personal preferences and desires. Subterfuge, misdirection and illusion abound, and no one gets a clear picture of what is really going on. Each hand the report touches becomes quicker than the eye of reality. It's no wonder that achieving success in project management can seem like it will take nothing short of a lot of a miracle. No accurate records and no accountability means trends cannot be observed, and that means everyone is forced to guess what it's going to take to get better. Organizations can no longer intelligently make important decisions, the opportunity for strategic influencing is laid bare and the entire process breaks down.

In the battle for project management success, everyone loses when the art of deception becomes the game to win.

Organizational Process

The Importance of Momentum and Culture

Defining a project management process within an organization is actually the easy part. Usually a small committee or someone that's very gung-ho about project management goes off and interviews a few people. A process is then developed and implemented that defines what they believe to be the proper steps that a good project manager should be following.

For the sake of realistic and pragmatic implementation, these processes are usually reduced to template-based approaches. This seems reasonable, but unfortunately success for driving organizational process is often measured by how many steps can be stuffed into each template. The process becomes unnecessarily complex and extremely difficult to police.

Say, for example, a template includes 100 questions or criteria. Not everyone is going to answer each and every one completely, if at all. Even if each project manager forgets or intentionally skips only five of them, no two people will skip the same five. Everyone ignores different parts, leading to a wide variety of adoption levels and an inability for individuals to see the value of following established processes. Adoption momentum slows, until it finally stalls and peters out. A lack of consensus and cooperation ends up crushing it. But maintaining momentum is critical, for it absolutely must exist in order for groups to accomplish anything.

Another main reason adoption is so difficult is because that is where project management intersects with company culture. Organizational cultures are the number one inhibitor to process adoption, and they can make or break any company-wide project management initiative. Culture can influence – even change – organizational process; processes never change culture. Culture is not something that can be transformed overnight. It takes a very long time. Culture outlives process every time.

Business Results

It's been said that a rational man acting in the real world is one who decides where he will strike a balance between what he desires and what can be done. Just because you want specific results does not mean they are achievable. It's not about what one wants; it's more about what one can realistically expect to get. Baseball fans can quickly tell you that a good hitter is one who can hit .300 or better; and that a good fastball pitcher can throw the ball 90+ mph. Football fans can tell you that the benchmark used to determine whether or not a running back had a good year is if he rushed for 1,000 yards.

How does the average fan know these things? Because members of the media and statisticians have analyzed data accumulated since the inception of each respective sport. Why is the bar for hitters not set at .500 or for rushers at 3,000 yards? It's because these goals have never been achieved, and are therefore simply unrealistic. The same holds for project management – planners and practitioners alike need to be searching for the best that can be attained, not the best that can be wished for.

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Many organizations tend to subscribe to a “let’s shoot for the stars, maybe we’ll hit the moon” mentality. This may be useful in some disciplines, but not in project management. Organizations need to set realistic goals.

5 PRACTICAL STEPS TO MAXIMIZING EFFICIENCIES, BOOSTING EMPLOYEE MORALE AND ACHIEVING GREATER PROJECT SUCCESS

“I’d rather ride on an ass that carries me than a horse that throws me.”

- George Herbert

Before offering the five practical steps that always lead to greater project success, the term “practical” must be defined. If something is practical, it is inclined toward or fitted for actual work. It is something that can be applied; not theoretical. It is useful now, and is always mindful and concerned with results.

There are also three important laws that should be associated with this definition:

1. 20 percent of actions directly relate to 80 percent of results;
2. Practicality drives consistency, and consistency drives results;
3. Incremental improvements are always sustainable.

Let’s return to baseball for a simple illustration. In the professional ranks, much time and effort is spent on perfecting the finer points in a pitcher’s motion. Certain drills, exercises and techniques are used to increase muscle memory, which allows professional players to do the right things right, and do them on a consistent basis. Maintaining consistency is the difference between doing something once an inning and doing it with every batter. The positive results take hold and endure. Long after pitchers in professional baseball retire, most can still throw baseballs with surprising accuracy. Sustainable results come from dwelling on the few but important things. It’s what separates the men from the boys.

Whether it’s baseball or project management, the things that make one good are the things that one should focus on. If one concentrates on the 20 percent of his or her actions that directly relate to 80 percent of the results, then improves in just those areas, he or she is going to see results. People that are succeeding are doing fewer things, but they are doing them right, and they are doing them consistently. They are working smarter, not harder.

Five Simple Steps

With practicality now defined and some of its key tenets summarized, we are now ready to explore the five, and only five, practical steps project managers and organizations can implement to achieve marked project management performance improvement.

The five steps include:

1. Project Planning
2. Project Baseline
3. Reporting
4. Change control
5. Project closure

That’s it. If project managers can do these five things, and the little things behind them, they will see great gains in project management performance and greatly enhance their ability to succeed. Sounds simple enough, but sometimes the simplest things are the hardest one to accomplish.

Project Planning

Project managers need to stop overcomplicating this initial phase. In its basic form, project planning focuses on identifying and documenting items related to a project’s scope, time and cost. In short, it is the basic process of documenting the understanding each party holds related to the project.

Nothing else should be allowed to creep into this phase. The worst thing that happens at this stage is when project managers take a project plan and start adding little things to it. The project plan must be matched with the project’s size and complexity and tailored accordingly. It is not a one size fits all approach.

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Project Baseline

The project baseline captures the project's predicted scope, time and costs at the very beginning stages, or anytime thereafter if someone chooses to change them. In other words, it's a snap of the chalk line. Project teams must treat the baseline as sacred, and only modify it through the change control process as described below.

This is possibly one of the hardest things to get through to project managers, and once again culture is the culprit. If a company's culture is one where people tear one another down when mistakes are made, then people are always going to hedge their bets. Nobody thinks what they've got is going to be good enough, and therefore they overestimate what can realistically be done. Project managers must become good at knowing when good enough is, well, good enough, and have the discipline to tow that line.

Reporting

Reports should be based on variances from the baseline in terms of time, cost and scope, and they need to be metric-based to ensure people are collecting information on a regular basis. If metric-based reporting doesn't occur, then managers won't ever get the data they need because no driver or reason exists for collecting it.

Good reporting ensures all people are collecting important information on a regular basis, and keeps all project managers out of the fantasy world they so often like to inhabit. It keeps them anchored in reality. Most project managers don't like to report on progress, and yet somehow they continue to believe (i.e., hope) they will magically improve anyway. Reporting provides a snapshot of where project managers and their projects really are at any given time, and not where people wish them to be.

Change Control

The change control process is meant to protect sacred project baselines while helping to manage key expectations among project stakeholders. The very word 'control' implies that somehow the process is intended to stop something from happening. But while change control does need to be a strict process that treats the project baseline as holy, it does not need to be inflexible. This is an important distinction that eludes many practitioners, much to the detriment of project results.

The main goal of the change control process should be to get and keep everyone on the same page, foster discussion, and then realign expectations when necessary. Rather than emphasizing control per se, project teams should be placing more emphasis on collaboration. In other words, everyone needs to view projects with all three major criteria in mind – cost, scope and time – as this is what leads to project success. If, for example, a change in time is requested, there will likely need to be some give and take in the other two areas to accommodate such a request. When project managers are able to see the big picture, they are much more willing to compromise on certain issues if it means realizing a greater overall result.

Simply put, change should not be feared. However, stakeholders must understand that they can't get something for nothing. Instead of prohibiting any adjustments, the change control process should foster the free exchange of ideas, negotiation, collaboration and a realignment of expectations. It should not be a cold gating process or be characterized by one transaction. Rather, it requires multiple iterations, and often times relationships need to be nurtured. This approach serves to remove ambiguity in expectations, and is the *ONLY* process by which the hallowed baseline should be changed.

COMING AROUND FULL CIRCLE – GETTING OFF THE MERRY-GO-ROUND

Individual Behavior

Because of their constant state of flux, project management groups must always be cultivated, trained *and* groomed. Team leaders must be sure to match a project manager's training and behavior to his or her job level. Novice project managers should be given a break while experts are pushed; juniors should be given smaller projects and trusted to get better through experience. Expectations need to be aligned appropriately, while everyone up and down the project management maturity ladder should be given a chance to learn and grow.

Then, all the knowledge gained along the way must be captured and put into a good state where it will be widely shared and in a manner that is actually useful. This forces full disclosure of project performance and helps get the organization realigned with project performance standards. But the consistent practice of desired behavior

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will only come when the community as a whole embraces it. And while costly carrots are no longer the norm in today's budget-constricted environment, harsh sticks only breed deceitful practices and should also be avoided at all costs. The fear of failure must be abolished, for failure can be the best teacher. Besides the practical knowledge that it provides, failure strips away false values and makes individuals realize and understand what's really needed. It stops people from chasing butterflies and puts them to work digging gold.

Organizational Process

Organizations must ensure that whatever process is defined, it is easily assimilated by the current culture. While it might be tempting, or even easy, team leaders must not let their department zealots do the defining. The only force in this step more damaging than human irrationality is irrationality armed with passion. Instead, find people who are 'middle of the road' in their beliefs, even disinterested, as they will have a much more reasonable and realistic approach to how things should and can be accomplished.

It is then important to keep score with regards to compliance – not only as a tool for individual assessment but also to establish a link between organizational practices and project results. The two always need to be connected and correlated, as project managers have got to add value to the organization if they want to remain a part of it.

It must be remembered that the greatest journey begins with the first step. When a project is initiated with a smaller set of processes, it is easier for individuals to see and appreciate the value that comes from them, which in turn increases the chances of getting their buy-in. By starting small and adding things incrementally, people are able to see the value in what they are doing and in the process they embrace. Compliance naturally follows.

It is also critically important to analyze project data to establish project performance standards; and managers must wait until *all* the data is in, which means it must be collected religiously. If people are routinely informed as to how they are doing, they will rally around the cause. They must be encouraged. They must be taught how to spend more time on the essentials. If need be, a service provider should be sought out and brought in that takes a practical approach to training, not one that pushes a 15-course curriculum that takes project managers from A-Z in the

PMBOK.

Finally, reality must be embraced, no matter how it looks. The sky is not less blue because the blind man doesn't see it. The key is to grab on to reality and not immediately pass judgment on it. Managers and leaders must always be open to changing standards, even if that means loosening them up a bit. More and more, finishing a project imperfectly today is viewed as more valuable than one finished perfectly tomorrow.

Business Results

By applying these practical concepts, project managers will experience flatter learning curves, enjoy shorter completion timeframes and spend less time and dollars getting there. They will become more relaxed and less stressed, and huge improvements in employee morale due to less frustration will be realized. Project management will still be as intense, but project managers won't be as worried about not doing enough or getting beat up if they fail. Team members will find they have a more balanced sense of work within them, more people will become aware of the few things that need to be done right, and there will be greater collaboration.

If individual behavior can be affected and organizational processes tweaked, greater project success will be achieved. Individual behavior has to be cultivated, new processes must take company culture into account and better results will only come when reality is embraced. It's time to get off the proverbial merry-go-round, and project managers can do so by adopting a more practical approach to project management.



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