

# Project Management

## ABSOLUTE BEGINNER'S GUIDE

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Third Edition

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Gregory M. Horine

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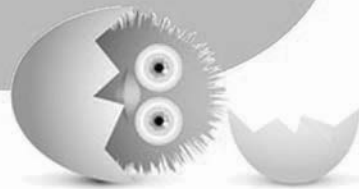


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# Project Management

Third Edition

**ABSOLUTE  
BEGINNER'S  
GUIDE**



Gregory M. Horine

**que**<sup>®</sup>

800 East 96th Street,  
Indianapolis, Indiana 46240

# Project Management Absolute Beginner's Guide, Third Edition

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## About the Author

**Gregory M. Horine** is a certified (PMP, CCP) business technology and IT project management professional with more than 23 years of successful results across multiple industries using servant leadership principles. Primary areas of expertise and strength include the following:

- Project management and leadership
- Complete project lifecycle experience
- Regulatory and process compliance
- Package implementation and integration
- Quality and risk management
- Enterprise solution development
- Effective use of project management tools
- Microsoft Project
- Project and portfolio management tools
- Complex application development
- Data analysis and transformation
- Business process analysis and improvement
- Vendor and procurement management
- Mind mapping tools

In addition, Mr. Horine holds a master's degree in computer science from Ball State University and a bachelor's degree in both marketing and computer science from Anderson College (Anderson, Indiana).

Through his "servant leadership" approach, Mr. Horine has established a track record of empowering his teammates, improving project communications, overcoming technical and political obstacles, and successfully completing projects that meet the targeted objectives.

Mr. Horine is grateful for the guidance and the opportunities that he has received from many mentors throughout his career. Their patience and influence has helped form a rewarding career marked by continuous learning and improvement.

When not engaged in professional endeavors, Mr. Horine hones his project management skills at home with his lovely wife, Mayme, and his five incredible children: Michael, Victoria, Alex, Luke, and Elayna.

## Dedication

*This book is dedicated to the “students” that I constantly visualized in my mind as I developed this book—the bright and caring family that surround my life, including my wife, parents, siblings, in-laws, aunts, uncles, cousins, and grandparents.*

*This book is also dedicated to the parents, families, practitioners, and researchers who are diligently fighting to rescue children from autism spectrum and bipolar disorders.*

*This book is dedicated to my key inspirational sources: my incredible wife, Mayme (I still wake up everyday with a smile in my heart knowing I am married to her), and my “fabulous five” children: Michael, Victoria, Alex, Luke, and Elayna (each one is a hero to me).*

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## INTRODUCTION

As organizations continue to move toward “project-based” management to get more done with fewer resources—and as the demand for effective project managers continues to grow—more and more individuals find themselves with the opportunity to manage projects for the first time.

In an ideal world, every new project manager candidate would complete certified project management training programs and serve as an apprentice before starting his first project manager opportunity, but...this is the real world. In many cases, a quicker, more accessible, and more economical alternative is needed to guide these candidates in managing projects successfully the first time.

The *Absolute Beginner’s Guide to Project Management*, Third Edition, is intended to provide this alternative in a helpful, fun, and practical style.



## About This Book

The objectives of this book include the following:

- To be a pragmatic guide that prepares a new project manager for the “real world.”
- To be an easy-to-use tutorial and reference for any person managing her first project(s).
- To teach the key concepts and fundamentals behind project management techniques. When you understand these, you can apply them effectively independent of toolset, environment, or industry.
- To reduce the on-the-job learning curve by sharing the traits of successful projects and “lessons learned” from less-than-successful projects.
- To balance the breadth of topics covered with adequate depth in specific areas to best prepare a new project manager.
- To review the skills and qualities of effective project managers.
- To emphasize the importance of project “leadership” versus just project “management.”

Consistent with the *Absolute Beginner's Guide* series, this book uses a teaching style to review the essential techniques and skills needed to successfully manage a project. By teaching style, I intend the following:

- A mentoring, coaching style that is fun, easy to read, and practical.
- Assumes that the reader does not have previous hands-on experience with project management.
- Teaches the material as if an instructor were physically present.
- Presents the material in task-oriented, logically ordered, self-contained lessons (chapters) that can be read and comprehended in a short period of time (15 to 30 minutes).
- Emphasizes understanding the principle behind the technique or practice.
- Teaches the material independent of specific tools and methodologies.
- Teaches the material with the assumption that the reader does not have access to organizational templates or methodologies.
- Provides a summary map of the main ideas covered at the end of each chapter. Research has shown that this type of “mind-map” approach can drive better memory recollection when compared to traditional linear summary approaches.

## OUT-OF-SCOPE

The scope of this book is clearly outlined in the table of contents, but as I will cover later, it is always good to review what is out of scope to ensure understanding of the scope boundaries. Because the field of project management is extremely broad, and we needed to draw the line somewhere, this book focuses on the proper management of a single project. As a result, the following advanced project management subjects are not covered in this book:

- Program management
- Enterprise portfolio management
- Enterprise resource management
- Advanced project risk management topics
- Advanced project quality management topics
- Advanced project procurement management topics

## DISCLAIMER

Although there are definitely concepts, fundamentals, and techniques covered in this book that are of enormous assistance to anyone taking the PMP certification exam, this book is not intended to be an exam preparation guide.

The focus is not on theory, academia, or the PMBOK® (PMI's *A Guide to the Project Management Body of Knowledge*, Fourth Edition). The focus is on getting the first-timer ready to manage his first project in the real-world environment.

Although the PMBOK is admirable industry standard, it is updated every four years to better capture the evolving knowledge in the field and to improve the consistency and clarity of the standards. It is not intended to be a "how-to" guide for a first-time practitioner.

## Who Should Read This Book?

The *Absolute Beginner's Guide to Project Management*, Third Edition is recommended for any person who fits into one or more of the following categories:

- Individuals unsatisfied with other introductory project management books
- Individuals new to project management, such as
  - Technologists
  - Knowledge workers
  - Students
  - Functional managers
- Professionals taking a first project management assignment, such as
  - Team leaders
  - Project coordinators
  - Project administrators
  - Project support
  - Functional managers
- Experienced project managers needing a refresher course
- Experienced project managers with limited formal project management education

## How This Book Is Organized

This book has been divided into five parts:

- Part I, "Project Management Jumpstart," sets up the general framework for our project management discussion and accelerates your project management learning curve, including an insightful review of successful projects and project managers.
- Part II, "Project Planning," reviews the processes that establish the foundation for your project.
- Part III, "Project Control," reviews the processes that allow you to effectively monitor, track, correct, and protect your project's performance.

- Part IV, “Project Execution,” reviews the key leadership and people-focused skills that you need to meet today’s business demands.
- Part V, “Accelerating the Learning Curve...Even More,” provides experienced insights and tips on making better use of Microsoft Project, including the “game-changing” new features of Microsoft Project 2010, and managing specific real-life project situations. It also covers many hot project management topics to further accelerate the knowledge base and skill level of the new project manager.

## Conventions Used in This Book

Throughout the book, I use the following conventions and special features:

- At the beginning of each chapter, you find a quick overview of the major topics that are expounded upon as you read through the material that follows.
- The end of each chapter provides a list of key points along with a visual summary map.
- You also find several special sidebars used throughout this book:



**NOTE** These highlight specific learning points or provide supporting information to the current topic.



**TIP** These highlight specific techniques or recommendations that could be helpful to most project managers.



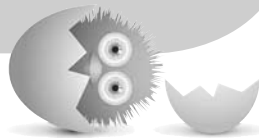
**CAUTION** These highlight specific warnings that a project manager should be aware of.

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## IN THIS CHAPTER

- Learn what comprises a “successful” project
- Understand the common characteristics of “troubled” projects
- Review the common characteristics of successful projects
- Find out which tools are indispensable to most project managers

# 3



## ESSENTIAL ELEMENTS FOR ANY SUCCESSFUL PROJECT

In this chapter, we want to continue the accelerated learning approach we started in the previous chapter. Anytime you are learning a new skill set, especially one that is as broad as project management, one of the most effective ways to reduce your learning curve and focus your mental energies is to understand what “successful” people do in the field, and, equally important, understand what not to do.

With this philosophy in mind, we will take a step up in this chapter and look at projects as a whole and not just the project manager position. We will review the leading causes of “troubled” projects and we’ll discuss the common principles, techniques, and tools underlying most successful projects. With this foundation in place, you will better understand the purpose and the value of the fundamentals covered in the rest of this book, and as a result, be much better positioned for success on your project management assignments.

## What Exactly Is a “Successful” Project?

You would think it would be relatively straightforward to describe the attributes of a successful project. Well, let's just say this endeavor has kept more than a few “spin doctors,” “politicians,” and “history revisionists” employed throughout organizations across our great land. Why is this the case? There are several reasons for this:

- There is a lack of universal harmony of what comprises project success metrics. It seems that every project management educational source and organizational process maturity standard has a slightly different definition of project success.
- For many projects, the acceptance and success criteria are never established or agreed to by all key stakeholders.
- In many cases, an organization might define a project as successful even when some of the textbook criteria for project success (such as schedule, cost, and client expectations) are not completely met. This is often the case if the project achieved strategic business or organizational objectives.
- In other cases, a “cancelled” project might be a “successful” project if there was a plan for one or more “go/no-go” decision points.

From a utopian, academic standpoint, the “ultimate” successful project would be defined as a project that:

- **Delivers as promised**—Project produces all the stated deliverables.
- **Completes on-time**—Project completes within the approved schedule.
- **Completes within budget**—Project completes under the approved budget.
- **Delivers quality**—Project deliverables meet all functional, performance, and quality specifications.
- **Achieves original purpose**—The project achieves its original goals, objectives, and purpose.
- **Meets all stakeholder expectations**—The complete expectations of each key stakeholder are met, including all client acceptance criteria, and each key stakeholder accepts the project results without reservation.
- **Maintains “win-win” relationships**—The needs of the project are met with a “people focus” and do not require sacrificing the needs of individual team members or vendors. Participants on successful projects should be enthusiastic when the project is complete and eager to repeat a similar experience.



**TIP** An excellent technique is to identify, document, review, and approve any criteria that will be used to measure the success of the project during the project definition and planning processes.

## Learning from Troubled Projects

Before we review the common traits of many successful projects, you can learn a lot from “less-than-successful” projects. From my experience, the reasons for project troubles can be generally classified in two groups: project-level issues and organizational-level issues.

One of the key differences in the two groups is the level of control that the project manager has over these factors. For project-level issues, the project manager has tremendous influence on these matters. In most cases, the project manager can either avoid the issue or take action to resolve it if it does occur. For organizational-level issues, the project manager cannot generally fix the problem, but the project manager can certainly have influence on them by asking the right questions, anticipating the associated risks and issues, focusing extra efforts to compensate for the issue, and developing contingency plans to minimize the impact on the project.

Also, please note that these issues are not exclusive. In most cases, there is overlap, and if you have one of these factors present in a project, you will generally have others. Table 3.1 summarizes these issues, gives specific examples of each, and notes what type of issue it is (organizational, project, or both).

**TABLE 3.1** Common Reasons for Troubled Projects

Reason	Example(s)	Type	Key Learning Point
Project not aligned	Project not aligned with business unit or organizational goals; project not aligned with other projects	Org.	Verify alignment before project kicks off
Lack of management support	Insufficient funding; insufficient resources; issues not resolved; senior management performance criteria not aligned with project success criteria	Org.	Understand project impact of organizational structure; ensure proper senior management involvement in project organization; advocate PMO and Steering Committee structures

(continues)



**TABLE 3.1** (continued)

Reason	Example(s)	Type	Key Learning Point
Lack of stakeholder buy-in	Purpose and goals not clear; “trust” relationship not established; inadequate communications; mismatched expectations; all stakeholders not involved	Both	Gain acceptance of project purpose, goals, and success upfront; ensure all stakeholders are identified and consulted; constantly communicate and validate understanding
Inadequate project sponsor	Inactive, unengaged sponsor; lack of leadership; ethical issues; not handling organizational issues; not supportive of project management process	Org.	Educate the sponsor on her roles and responsibilities; gain formal authorization of project and the project management position; understand sponsor’s motives and incentives
Too many project sponsors	Conflicting project goals; lack of ownership; political battles	Org.	Relates to the need for proper project alignment and clear roles and responsibilities
Lack of clarity on roles and responsibilities	Inefficient work efforts; missed deadlines; lower team morale; delayed issue resolution	Both	Use <i>Responsibility Matrix</i> to clarify all roles and responsibilities; Review roles and responsibilities with each individual; Validate expectations in advance
Poor communication	Inconsistent, incomplete, or nonexistent status information on key project metrics; inadequate tracking and monitoring of project progress; not listening to stakeholder concerns or feedback; not using proper mediums for certain project communications; messages are not clear or occur too frequently	Project	Develop a project Communications Plan that is acceptable to all stakeholders; establish tracking and monitoring mechanisms during planning; constantly seek questions and feedback; Understand each stakeholder’s perspective; clearly set context of each message
Price wars	Due to budget reduction measures or market pressures, management agrees to perform project at or below estimated costs	Org.	Develop complete, detailed project budgets; communicate associated risks; improve negotiating skills

**TABLE 3.1** (continued)

Reason	Example(s)	Type	Key Learning Point
Resource conflicts	Lack of dedicated team members; key resources not available when scheduled	Org.	Develop project Resource Plan; gain commitments from Resource Managers; encourage centralized organizational structure for resource planning/ deployment
Inadequate project manager	Lack of leadership; inexperienced or untrained project manager; ineffective project manager	Both	Organizational commitment to PM education; use of PM mentorship programs
Underestimate change impact	Not understanding the complete effects on both existing processes and people that the "change" introduced by the project will have; not properly preparing or planning for the "change"	Org.	Use project sponsor and business process owners to champion the new process; involve additional stakeholders to understand their needs and to solicit their support; plan for the necessary communications and training (change management plan); plan for the "disruptive" deployment period; utilize pilot approaches to minimize impact
Inadequate planning	Management does not require or allow time for proper planning; incomplete scope or deliverables list; incomplete "work identification; lack of detailed schedule; inadequate risk identification; assumptions not documented; lack of schedule and budget contingency	Both	Educate senior management on the value of proper planning; use standard methodology for project planning; gain format acceptance or Project Plan before proceeding; develop realistic project schedule and budget, as well as tools and processes to keep updated; Identify and document project risks and mitigation strategies
Lack of change control management	Scope of work increases without proper schedule, budget, or resource adjustments; changes occur to deliverables, schedule, or budget without proper notification and approval	Project	Utilize formal change control procedures to properly assess and communicate any change to the scope, schedule, budget, and targeted project deliverable

(continues)

**TABLE 3.1** (continued)

Reason	Example(s)	Type	Key Learning Point
Lack of completion criteria	Missed stakeholder expectations; increased costs or missed deadlines due to rework; lack of smooth transition from one phase to another	Both	Ensure success criteria is established during planning phase; Define user acceptance criteria for project deliverables; Define exit criteria for project phases
Inadequate progress tracking	Inability to measure project status and probability for success; inability to review project at key points to make go/no-go decisions	Both	Establish and execute periodic status meetings and reporting (weekly in most cases); review project at scheduled intervals against established criteria to determine if project should progress into next phase
Unforeseen technical difficulties	Effort spent resolving technical issues drive missed schedules and increased costs; unproven technology does not meet user expectations	Project	Structure project to deal with high-risk technical challenges early in the project; prove the technology before making additional investment; leverage technical expertise to support team capabilities
Poor requirements definition and/or management	Documented requirements not aligned with actual objective, workflow, or process; updated/changed requirements not implemented; delivered product is not adequate; stakeholders not satisfied	Both	Utilize requirements gathering techniques that elicit engaged participation and make it easier for stakeholders to visualize final deliverable; evaluate how requirements are reviewed and approved; establish a process to manage and communicate updates to requirements



**CAUTION** A good project manager can still end up managing a “troubled” project. Sometimes, your best project management work might be in minimizing the damage from a troubled project.

## Learning from Successful Projects

After reviewing what makes a project successful and the common ills that befall many troubled projects, you likely have a good sense of the qualities and traits shared by most successful projects. Although no two projects are ever the same,

and every project has its own unique set of challenges, there is a common core of principles that successful projects share. By understanding these, a new project manager can better prioritize and better focus his project management efforts. These qualities are generally true about successful projects:

- Project is aligned with organizational goals.
- Project has effective management support.
- Project has effective leadership.
- All key stakeholders are in agreement on the purpose, goals, and objectives of the project.
- All key stakeholders share a common vision on the project results.
- All key stakeholders share realistic expectations for the project results.
- The project results meet the expectations of the key stakeholders.
- Stakeholder expectations are constantly managed and validated throughout the project.
- There is an investment made in proper planning.
- The project scope, approach, and deliverables are clearly defined and agreed upon during planning.
- Each stakeholder and team member's role(s) and responsibilities are clearly communicated and understood.
- A high priority is placed on accurate and complete work effort estimates.
- A realistic schedule is developed and agreed upon.
- The project team is results focused and customer-oriented.
- Requirements are effectively defined and properly managed.
- Project communications are consistent, effective, and focused on understanding.
- Project progress is measured consistently from the current baseline.
- Project issues and subsequent action items are aggressively pursued.
- There is a strong sense of collaboration and teamwork.
- Expectations and changes surrounding scope, quality, schedule, and cost are closely managed.
- Project resources are skilled and available when needed.

- Project team proactively identifies risk and determines mitigation strategies to reduce project exposure.
- Project team anticipates and overcomes obstacles to ensure project meets objectives.

## Essential Project Manager Toolkit

Although there are many facets of project management and many lessons to be learned from both troubled projects and successful projects, there is an essential set of tangible tools that any project manager needs to have to best manage any project. Table 3.2 lists these essential tools and why they are important.

The important principles to remember regarding project management tools are as follows:

- Any planning document needs to be reviewed and agreed to by appropriate project stakeholders and team members.
- Separate documents are not always needed. Smaller projects might combine relevant information (especially “plan” documents) into a single “grouped” document.
- The essential tools represent the key information and thought processes that are needed to effectively manage the project.

**TABLE 3.2** Essential Project Manager Tools

<b>Tool</b>	<b>Description</b>	<b>Value</b>	<b>Notes</b>
Project Charter	Authorizes project and the project manager	Provides official notice to the organization	Might not always be a formal document; at a minimum, get an email notification
Project Definition Document	Defines project purpose, objectives, success criteria, and scope	Key for managing expectations, controlling scope, and completing other planning efforts	Core tool
Requirements	Defines the specifications for product/output of the project	Key for managing expectations and controlling scope	Core tool; document or database

TABLE 3.2 (continued)

Tool	Description	Value	Notes
Project Schedule	Shows all work efforts, properly estimated, with logical dependencies, assigned to responsible resources scheduled against a calendar	Key for directing all project team work efforts; key for managing expectations; allows for impact and what-if simulations when things change	Core tool
Status Reports	Periodic reviews of actual performance versus expected performance	Provides essential information to stakeholders; allows for timely identification of performance variances	See Chapter 10, "Controlling a Project," and Chapter 17, "Maintaining Project Communications," for more details
Milestone Chart	A summary of the detailed project schedule showing progress against key milestones	Allows stakeholders to see high-level project progress on one page	Detailed schedule roll-ups can be difficult to read and interpret; incorporate into Status Report
Project Organization Chart	Shows all project stakeholders and the working relationships among them	Allows team members to get a better understanding of the project roles and organizational dynamics	On smaller projects, might be combined with project plan or project definition document
Responsibility Matrix	Defines all project roles and indicates what responsibilities each role has	Key for managing expectations; establishes accountability	On smaller projects, might be combined with project plan or project definition document
Communication Plan	Defines the how, what, when, and who regarding the flow of project information to stakeholders	Key for managing expectations; establishes buy-in	On smaller projects, might be combined with project plan or project definition document

(continues)

**TABLE 3.2** (continued)

<b>Tool</b>	<b>Description</b>	<b>Value</b>	<b>Notes</b>
Quality Management Plan	Defines the approaches and methods that will be utilized to manage the quality levels of project processes and results	Key for managing expectations regarding quality, performance, and regulatory compliance matters; impacts work efforts and project schedule; establishes accountability	On smaller projects, might be combined with project plan or project definition document
Staffing Management Plan	Lists how project resources will be acquired, when they are needed, how much they are needed, and how long they will be needed	Key for building schedule; key for properly managing resources	Might also include role profiles, rates, training needs; on smaller projects, might be combined with project plan or project schedule
Risk Response Plan	Lists each identified risk and the planned response strategy for each	Communicates potential issues in advance; proactive measures help reduce impact to project	On smaller projects, might be combined with project plan or project definition document
Project Plan	Formal, approved document that is used to manage project execution	Includes all other supplemental planning documents; key output of project planning	On smaller projects, might be combined with project plan or project definition document
Deliverable Summary	Defines and lists all deliverables to be produced by the project	Key to managing expectations; ensures proper visibility, tracking, and reporting of targeted deliverables	Might be combined with status reports; might be part of a project communications
Project Log	Captures essential information for each project risk, issue, action item, and change request	Ensures proper visibility, tracking, and reporting of items impacting the project	Core tool
Change Request Form	Captures essential information for any requested change that impacts scope, schedule, or budget	Allows change item to be properly assessed and communicated before action is taken	Core tool

**TABLE 3.2** (continued)

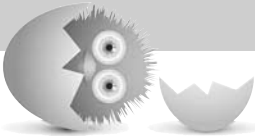
Tool	Description	Value	Notes
Project Repository	The location where all pertinent project information is stored	Key part of managing project information; Project team knows where to find current project documents	Identified in Project Plan and/or Configuration Management Plan; most are digital, but might have physical location, too
Project Notebook	Used by project manager to maintain official record of important project documents and deliverables	Part of managing project information	Electronic and/or hardcopy versions; frequently incorporated into Project Repository



## THE ABSOLUTE MINIMUM

At this point, you should have a solid understanding of the following:

- What defines a successful project and why it is not always easy to measure
- The common reasons why projects get in trouble and what you can do to avoid them
- The key principles that serve as the foundation for most successful projects
- The essential project management tools and why they are important



The map in Figure 3.1 summarizes the main points reviewed in this chapter.

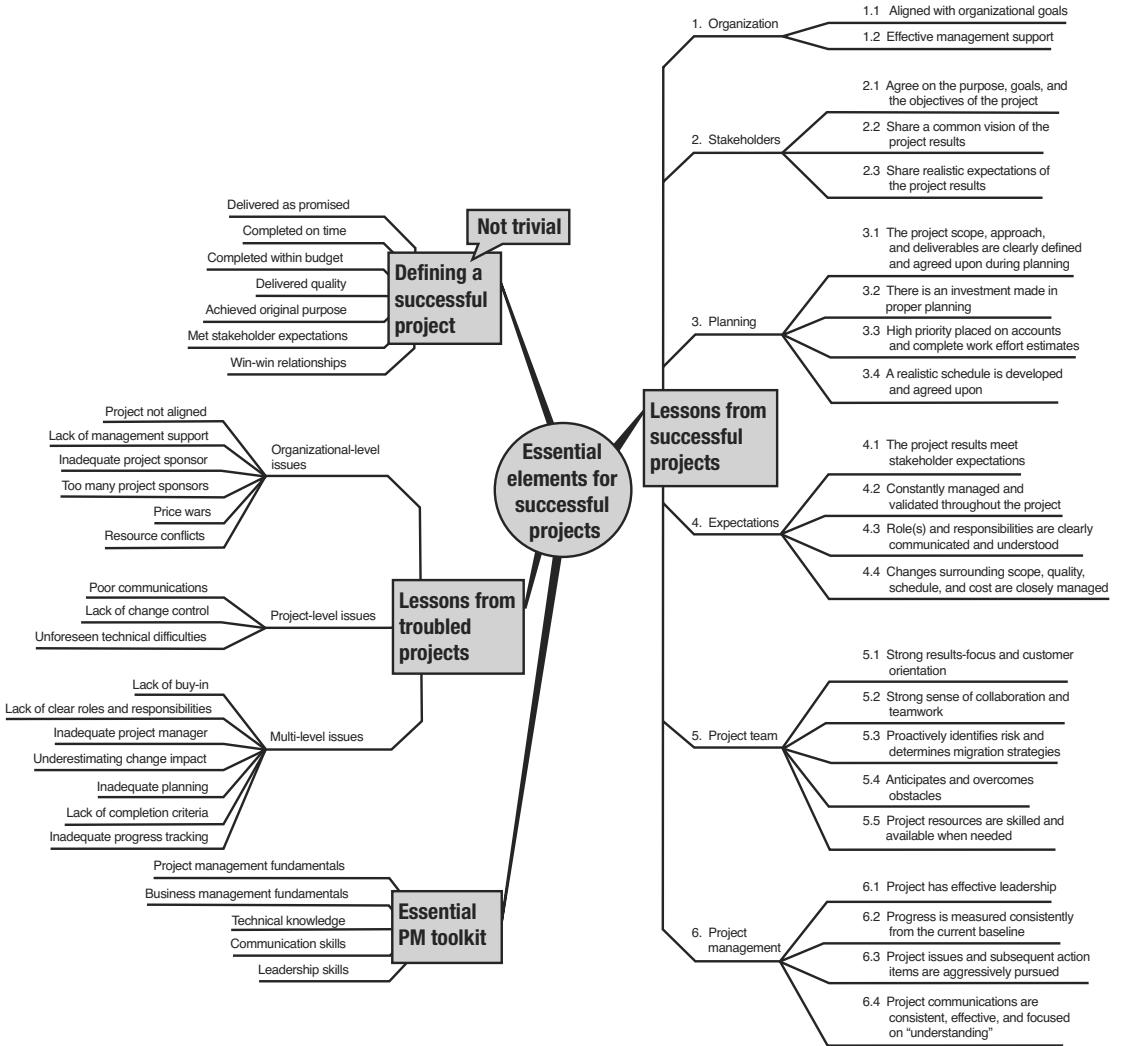


FIGURE 3.1

Essential elements for any successful project overview.

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