Project Management

ABSOLUTE BEGINNER'S GUIDE

No experience necessary!

Fourth Edition

Gregory M. Horine
Contents at a Glance

Introduction ................................................................................................................. 1

Part I  Project Management Jumpstart
1  Project Management Overview ................................................................. 7
2  The Project Manager ................................................................................. 23
3  Essential Elements for Any Successful Project ................................... 33

Part II  Project Planning
4  Defining a Project .................................................................................... 45
5  Planning a Project .................................................................................. 57
6  Developing the Work Breakdown Structure ....................................... 75
7  Estimating the Work ................................................................................ 91
8  Developing the Project Schedule ............................................................ 105
9  Determining the Project Budget ............................................................... 123

Part III  Project Control
10  Controlling a Project ............................................................................... 135
11  Managing Project Changes .................................................................. 155
12  Managing Project Deliverables ............................................................... 171
13  Managing Project Issues ....................................................................... 185
14  Managing Project Risks ......................................................................... 195
15  Managing Project Quality ....................................................................... 213

Part IV  Project Execution
16  Leading a Project .................................................................................... 225
17  Managing Project Communications ....................................................... 237
18  Managing Expectations .......................................................................... 257
19  Keys to Better Project Team Performance .......................................... 277
20  Managing Differences ........................................................................... 289
21  Managing Vendors ................................................................................ 303
22  Ending a Project .................................................................................... 317

Part V  Accelerating the Learning Curve…Even More
23  Making Better Use of Microsoft Project ............................................ 325
24  When Reality Happens .......................................................................... 361
25  The Fun Never Stops ............................................................................. 381
26  Powerful PMP Exam Tips ..................................................................... 407

Index .......................................................................................................................... 421
# Table of Contents

- **Introduction** ........................................................................... 1
- **About This Book** ................................................................ 2
- **Who Should Read This Book?** .................................................. 4
- **How This Book Is Organized** .................................................... 4
- **What’s New in This Edition** ........................................................ 5
- **Conventions Used in This Book** .................................................. 5

## I Project Management Jumpstart

### 1 Project Management Overview .................................................. 7
- What Is Project Management...Exactly? ........................................... 8
- What Is a Project Exactly? ............................................................... 8
- Managing Projects ....................................................................... 10
- An Academic Look ....................................................................... 10
- What Is the Value of Project Management? ...................................... 14
- Why Are Projects Challenging? .................................................... 15
- Growing Demand for Effective Project Managers .......................... 17
- Trends in Project Management ...................................................... 18
- Additional Resources .................................................................... 19

### 2 The Project Manager ................................................................. 23
- One Title, Many Roles ................................................................ 24
- Key Skills of Project Managers .................................................... 25
- Qualities of Successful Project Managers ...................................... 27
- 15 Common Mistakes of Project Managers .................................... 29

### 3 Essential Elements for Any Successful Project ......................... 33
- What Exactly Is a Successful Project? ............................................ 34
- Learning from Troubled Projects .................................................. 35
- Learning from Successful Projects ................................................. 39
- Essential Project Manager Toolkit ................................................ 40
# II Project Planning

## 4 Defining a Project

- Setting the Stage for Success ................................................................. 46
- How Does Defining a Project Relate to Project Planning? ..................... 47
- Project Definition Document ............................................................... 48
  - Required Elements ........................................................................... 49
  - Additional Elements to Consider ...................................................... 51
- Project Definition Checklist ................................................................. 52
  - General ............................................................................................... 53
  - Scope .................................................................................................. 53
  - Stakeholders ..................................................................................... 54
  - Project Approach ............................................................................... 54
  - Other ................................................................................................... 54
  - Acceptance ........................................................................................ 55

## 5 Planning a Project

- Key Project Planning Principles ........................................................... 58
- Important Questions Project Planning Should Answer ......................... 60
- Building a Project Plan ......................................................................... 62
- Summary of Supplemental Project Plan Components ......................... 70
- Project Plan Checklist .......................................................................... 72

## 6 Developing the Work Breakdown Structure

- What Exactly Is a WBS? ........................................................................ 76
- Isn’t WBS Just Another Name for the Project Schedule? ....................... 79
- Key Differences Between the WBS and the Project Schedule .............. 82
- Different Types of Breakdown Structures ............................................ 82
- Why Is the WBS Important? ................................................................. 83
- The Process of Building a WBS .......................................................... 84
  - Getting Started ................................................................................ 85
  - Guidelines for Effective WBS ........................................................... 85
  - Knowing When to Stop .................................................................... 87

## 7 Estimating the Work

- Next Step in the Schedule Development Process .................................. 92
- Managing the Risk, Managing the Estimates ....................................... 94
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reasons for Estimating Woes</td>
<td>95</td>
</tr>
<tr>
<td>Powerful Estimating Techniques and Methods</td>
<td>97</td>
</tr>
<tr>
<td>Best Practices</td>
<td>100</td>
</tr>
<tr>
<td><strong>8 Developing the Project Schedule</strong></td>
<td>105</td>
</tr>
<tr>
<td>The Impact of the Project Schedule</td>
<td>106</td>
</tr>
<tr>
<td>The Goal of the Schedule Development Process</td>
<td>110</td>
</tr>
<tr>
<td>Key Inputs for Building a Schedule</td>
<td>110</td>
</tr>
<tr>
<td>Creating a Schedule</td>
<td>112</td>
</tr>
<tr>
<td>Determining Task Relationships (Sequencing the Work)</td>
<td>113</td>
</tr>
<tr>
<td>Building the Preliminary Schedule</td>
<td>115</td>
</tr>
<tr>
<td>Perform Reality Check</td>
<td>116</td>
</tr>
<tr>
<td>Shorten the Schedule</td>
<td>117</td>
</tr>
<tr>
<td>Walk Through the Schedule</td>
<td>118</td>
</tr>
<tr>
<td>Presenting the Schedule</td>
<td>119</td>
</tr>
<tr>
<td><strong>9 Determining the Project Budget</strong></td>
<td>123</td>
</tr>
<tr>
<td>The Impact of the Project Budget</td>
<td>124</td>
</tr>
<tr>
<td>Principles of an Effective Budget</td>
<td>125</td>
</tr>
<tr>
<td>Creating a Project Budget</td>
<td>126</td>
</tr>
<tr>
<td>Sources of Project Costs</td>
<td>127</td>
</tr>
<tr>
<td>Developing an Initial Budget</td>
<td>130</td>
</tr>
<tr>
<td>Finalizing a Budget</td>
<td>130</td>
</tr>
<tr>
<td>Common Budget Challenges</td>
<td>131</td>
</tr>
<tr>
<td><strong>III Project Control</strong></td>
<td></td>
</tr>
<tr>
<td><strong>10 Controlling a Project</strong></td>
<td>135</td>
</tr>
<tr>
<td>What Is Project Control?</td>
<td>136</td>
</tr>
<tr>
<td>PDA: The Principles of Project Control</td>
<td>137</td>
</tr>
<tr>
<td>Components of Project Control</td>
<td>138</td>
</tr>
<tr>
<td>Management Fundamentals for Project Control</td>
<td>139</td>
</tr>
<tr>
<td>Powerful Techniques for Project Control</td>
<td>141</td>
</tr>
<tr>
<td>Performance Reporting</td>
<td>144</td>
</tr>
<tr>
<td>Variance Responses</td>
<td>146</td>
</tr>
</tbody>
</table>
Leveraging Earned Value Management Concepts ............................................ 146
Common Project Control Challenges ............................................................... 150
Lessons from Project Recoveries ................................................................. 151

11 Managing Project Changes ........................................................................ 155
What Exactly Is a Project Change and What’s the Big Deal, Anyway? .......... 156
Project Change Types—More Than Scope ...................................................... 157
Relation to Configuration Management and Organizational Change Management ........................................................................... 157
Fundamentals for Managing Project Change .................................................. 159
What Causes Unplanned Scope Changes? ....................................................... 160
Essential Elements of a Project Change Control System ................................. 161
Principles .......................................................................................................... 162
Guidelines ........................................................................................................ 162
Components ...................................................................................................... 163
Powerful Techniques for Minimizing Project Changes ................................... 164
Common Project Change Control Challenges ............................................... 166

12 Managing Project Deliverables ................................................................. 171
“Managing Project Deliverables” Means What, Exactly? .............................. 172
Why Do This? It’s Too Much Work .................................................................. 173
Identify, Protect, and Track: The Principles of Managing Work Products .... 174
Best Practices .................................................................................................. 175
Configuration Management Plan ..................................................................... 180
Common Challenges and Pitfalls ..................................................................... 182

13 Managing Project Issues .......................................................................... 185
The Goals, Objectives, and Principles of Project Issue Management .......... 186
Key Features of Issue Management Systems ................................................... 187
Options for Issue Log ...................................................................................... 189
Best Practices .................................................................................................. 191
Some Special Situations ................................................................................... 192
14 Managing Project Risks ................................................................. 195
   Key Risk Management Principles ............................................... 196
   The Essential Process for Managing Project Risks ....................... 197
      Risk Response Options ...................................................... 199
   Key Risk Management Tools .................................................. 200
   The Common Sources of Project Risk ...................................... 201
   Typical Problems .................................................................... 206
   Powerful Risk Control Strategies .......................................... 208
   Are You Sure It’s a Risk? ......................................................... 209

15 Managing Project Quality .......................................................... 213
   What Is “Project Quality”? ....................................................... 214
   Unique Aspects of Managing Project Quality ............................ 215
   Principles of Managing Project Quality .................................... 215
   Powerful Tools and Techniques for Project Quality .................. 217
   Powerful Quality Strategies ................................................ 220
   Typical Quality-Related Challenges ........................................ 221

IV Project Execution ......................................................................

16 Leading a Project ...................................................................... 225
   More Than Managing ................................................................ 226
   Where Is Leadership Needed on a Project? ................................. 229
   Twelve Keys to Better Project Leadership .................................. 230
   Power of Servant Leadership Approach ................................. 234

17 Managing Project Communications ............................................ 237
   What Are Project Communications? ......................................... 238
   The Importance of Project Communications .............................. 240
   Why Communicating Can Be Tough .......................................... 240
   Seven Powerful Principles ...................................................... 242
   Best Practices of Effective Project Communicators ................... 245
<table>
<thead>
<tr>
<th>18 Managing Expectations</th>
<th>257</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of Reviewing Stakeholder Expectation Management</td>
<td>258</td>
</tr>
<tr>
<td>Critical Aspects of Expectations</td>
<td>259</td>
</tr>
<tr>
<td>Balancing Reality and Perception</td>
<td>259</td>
</tr>
<tr>
<td>Not Just Scope Management</td>
<td>260</td>
</tr>
<tr>
<td>Seven Master Principles of Expectation Management</td>
<td>265</td>
</tr>
<tr>
<td>Essential Elements of Managing Expectations</td>
<td>266</td>
</tr>
<tr>
<td>Project Planning and Control Elements—A Quick Review</td>
<td>266</td>
</tr>
<tr>
<td>Leveraging Kickoff Meetings</td>
<td>268</td>
</tr>
<tr>
<td>Requirements Management—The Difference Maker</td>
<td>270</td>
</tr>
<tr>
<td>19 Keys to Better Project Team Performance</td>
<td>277</td>
</tr>
<tr>
<td>High-Performing Teams</td>
<td>278</td>
</tr>
<tr>
<td>Ten Key Management Principles</td>
<td>278</td>
</tr>
<tr>
<td>Proven Techniques for Better Team Performance</td>
<td>282</td>
</tr>
<tr>
<td>Special Situations</td>
<td>285</td>
</tr>
<tr>
<td>20 Managing Differences</td>
<td>289</td>
</tr>
<tr>
<td>Five Key Principles</td>
<td>290</td>
</tr>
<tr>
<td>Proven Techniques for Leading Cross-Functional Projects</td>
<td>293</td>
</tr>
<tr>
<td>Proven Techniques for Leading Cross-Cultural Projects</td>
<td>296</td>
</tr>
<tr>
<td>Proven Techniques for Leading Virtual Projects</td>
<td>296</td>
</tr>
<tr>
<td>21 Managing Vendors</td>
<td>303</td>
</tr>
<tr>
<td>First, Let’s Clarify a Few Terms</td>
<td>304</td>
</tr>
<tr>
<td>Ten Proven Principles of Vendor Management</td>
<td>304</td>
</tr>
<tr>
<td>Twelve Tips for Buyers</td>
<td>307</td>
</tr>
<tr>
<td>Seven Tips for Sellers</td>
<td>310</td>
</tr>
<tr>
<td>Twelve Key Project Management Skills for Better Vendor</td>
<td>311</td>
</tr>
<tr>
<td>Management</td>
<td></td>
</tr>
</tbody>
</table>
## Stuff You Need to Know About Contracts

- Conditions for a Legal Contract .................................................. 311
- Key Contract Elements ................................................................... 312
- Primary Contract Types ................................................................. 312
- The Impact of Each Contract Type .................................................. 313

## Ending a Project ........................................................................ 317

- Three Key Principles .................................................................... 318
- Project End Checklist: 13 Important Steps .................................... 318
- Common Project Closing Challenges ............................................. 320
- Methods for Ending a Contract or a Project .................................. 321
  - Terminating a Contract ................................................................. 321
  - Terminating a Project .................................................................. 322

## Accelerating the Learning Curve...Even More

### Making Better Use of Microsoft Project .................................. 325

- Understand This…and It All Becomes Easier .................................. 326
- Need-to-Know Features ................................................................. 329
- New Project Best Practices ............................................................ 337
- Keys to Making Resource Leveling Work ..................................... 341
- Powerful Reporting Secrets .......................................................... 343
- More Insights to a Better Project Schedule .................................... 349
- Project 2010—The Game Changer ................................................ 352
- What Do I Need to Know About Project 2013, Project 2016, Project Online, and Office 365 Planner? .............................................. 355
  - Project Online ............................................................................. 355
  - Project 2013 ................................................................................ 355
  - Project 2016 ................................................................................. 356
  - Office 365 Planner ....................................................................... 356

### When Reality Happens ................................................................. 361

- What If I’m in a Project Management “Lite” Culture? ...................... 362
- What If I Can’t Develop a Detailed Schedule? .............................. 364
- What If I Must Manage to a Hard Milestone Date? ......................... 365
- What If I Have Difficult Resources? .............................................. 368
What Can I Do About Turnover ................................................................. 369
Tips for Managing a Selection Process .................................................. 370
Tips for Managing a Testing Process ...................................................... 375
25 The Fun Never Stops ........................................................................... 381
Agile Approaches .................................................................................. 382
HIPAA, Privacy, and Security ................................................................. 386
Project Management Offices ................................................................. 388
  Traits of Successful PMOs .................................................................. 390
Portfolio Project Management .............................................................. 392
Governance Processes ........................................................................... 393
Critical Chain Project Management ....................................................... 394
Web-Based Project Management and Collaboration Tools .................... 396
Requirements Management Tools ......................................................... 398
Mind Mapping Tools ............................................................................ 399
Value of Certifications .......................................................................... 401
Project Management Training ............................................................... 402
26 Powerful PMP Exam Tips .................................................................. 407
Common “Context” Differences ............................................................. 408
Common “Experience” Differences ......................................................... 409
Common Terminology Differences ......................................................... 410
What’s Important to PMI? ..................................................................... 411
Key PMI Assumptions and Themes ........................................................ 412
What Is the PMP Exam Like? ................................................................ 414
Exam Topics Not Covered by PMBOK .................................................... 415
Exam Preparation Strategies .................................................................. 416
Exam-Taking Tips .................................................................................. 417
Index ......................................................................................................... 421
About the Author

Gregory M. Horine is a certified (PMP, CCP) business technology and IT project management professional with more than 27 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
- Complex application development
- Package implementation and integration
- Enterprise solution development
- Effective use of project management tools
- Microsoft Project
- Project and portfolio management tools
- Data analysis and transformation
- Business process analysis and improvement
- Vendor and procurement management
- Mind mapping tools
- Quality and risk management
- Regulatory and process compliance

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.
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 surrounds 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 every day 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).

Acknowledgments

I am grateful for the patience, support, and teamwork demonstrated by the following individuals: my editor, Laura Norman; the Que Publishing team, my family; and my parents, Carla and Bud.

In addition, I want to acknowledge the talents and professionalism of Mr. Craig Thurmond for his graphical design contributions to this book.

We Want to Hear from You!

As the reader of this book, you are our most important critic and commentator. We value your opinion and want to know what we’re doing right, what we could do better, what areas you’d like to see us publish in, and any other words of wisdom you’re willing to pass our way.

We welcome your comments. You can email or write to let us know what you did or didn’t like about this book—as well as what we can do to make our books better.

Please note that we cannot help you with technical problems related to the topic of this book.

When you write, please be sure to include this book’s title and author as well as your name and email address. We will carefully review your comments and share them with the author and editors who worked on the book.

Email: feedback@quepublishing.com

Mail: Que Publishing
     ATTN: Reader Feedback
     800 East 96th Street
     Indianapolis, IN 46240 USA
Reader Services

Register your copy of *Project Management Absolute Beginner's Guide* at quepublishing.com for convenient access to downloads, updates, and corrections as they become available. To start the registration process, go to quepublishing.com/register and log in or create an account*. Enter the product ISBN, 9780789756756, and click Submit. When the process is complete, you will find any available bonus content under Registered Products.

*Be sure to check the box that you would like to hear from us to receive exclusive discounts on future editions of this product.
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 a 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.

*Absolute Beginner’s Guide to Project Management*, Fourth 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 a first project.
• 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 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 Guide (PMI’s A Guide to the Project Management Body of Knowledge). The focus is on getting the first-timer ready to manage a first project in the real-world environment.

Although the PMBOK is an 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.

That being said, I have added some PMP exam-preparation pointers in Chapter 25, “The Fun Never Stops.”
Who Should Read This Book?

Absolute Beginner’s Guide to Project Management, Fourth 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
- 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 enable 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 to better handle real-life project situations that will further accelerate the knowledge base and skill level of the new project manager. Key topics include making better use of Microsoft Project, dealing with real-world situations, and other concepts that a new project manager is likely to encounter. And new to the fourth edition is a bonus section on PMP exam preparation.

What’s New in This Edition

While the key principles of project management, leading teams, and effective communication that this book has focused on since 2005 are timeless, this book has always been ahead of the curve in addressing leading-edge trends in projects and project management and in providing powerful tips to help reduce the learning curves for new project managers. Hot key trends in project management, such as agile approaches, leading virtual/remote teams, leading disparate teams, and cloud collaboration tools, have been included since the first edition.

However, it has been four years since the third edition.

In this edition, existing sections have been enhanced with more references to those trends mentioned before, especially the sections on Microsoft Project (in Chapter 23) and agile approaches (in Chapter 25). Also, a new section was added in Chapter 25 to cover key security, HIPPA compliance, and privacy learning points.

On top of that, all references to the PMBOK have been updated with the PMBOK Guide – Sixth Edition references (currently scheduled for release in 2017), and a new bonus chapter (Chapter 26) on PMP exam preparation has been added.

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.
THE PROJECT MANAGER

As we reviewed in Chapter 1, “Project Management Overview,” the project manager has many activities to perform, challenges to overcome, and responsibilities to uphold over the life of a project. Depending on your individual experiences, your industry background, and the manner in which project management has been implemented, this review might have been quite enlightening to you.

To ensure that we have a common understanding of what a project manager does, in this chapter I review the different roles a project manager plays over the life of a project and discuss the prerequisite skills that you need to perform those roles. Most importantly, I accelerate your learning curve by sharing the characteristics of successful project managers and the common mistakes made by many others.
One Title, Many Roles

You’ve likely heard many of the analogies before to describe the role of project manager—the “captain” of the ship, the “conductor” of the orchestra, the “coach” of the team, the “catalyst” of the engine, and so on. There’s truth and insight in each of the analogies, but each can be incomplete as well. To gain better understanding of what a project manager does, let’s briefly discuss each of the key roles played by the project manager:

- **Planner**—Ensures that the project is defined properly and completely for success, all stakeholders are engaged, work effort approach is determined, required resources are available when needed, and processes are in place to properly execute and control the project.

- **Organizer**—Using work breakdown, estimating, and scheduling techniques, determines the complete work effort for the project, the proper sequence of the work activities, when the work will be accomplished, who will do the work, and how much the work will cost.

- **Point Person**—Serves as the central point of contact for all oral and written project communications.

- **Quartermaster**—Ensures the project has the resources, materials, and facilities it needs when it needs it.

- **Facilitator**—Ensures that stakeholders and team members who come from different perspectives understand each other and work together to accomplish the project goals.

- **Persuader**—Gains agreement from the stakeholders on project definition, success criteria, and approach; manages stakeholder expectations throughout the project while managing the competing demands of time, cost, and quality; and gains agreement on resource decisions and issue resolution action steps.

- **Problem Solver**—Utilizes root-cause analysis process experience, prior project experience, and technical knowledge to resolve unforeseen technical issues and take any necessary corrective actions.

- **Umbrella**—Works to shield the project team from the politics and “noise” surrounding the project, so they can stay focused and productive.

- **Coach**—Determines and communicates the role each team member plays and the importance of that role to the project’s success, finds ways to motivate each team member, looks for ways to improve the skills of each team member, and provides constructive and timely feedback on individual performances.
• **Bulldog**—Performs the follow-up to ensure that commitments are maintained, issues are resolved, and action items are completed.

• **Librarian**—Manages all information, communications, and documentation involved in the project.

**NOTE** Although there is consensus that the disciplines and techniques used in project management can be applied in any industry, there is no consensus on whether individual project managers can be effective in a different industry. There is no doubt that the more knowledge and experience that a project manager has in the subject matter area of the project, the more value he or she can offer. However, depending on the size of the initiative and the team composition, a project manager with different industry experience can bring tremendous value if that person is strong in the other four key skill categories discussed.

• **Insurance Agent**—Continuously works to identify risks and develop responses to those risk events in advance.

• **Police Officer**—Consistently measures progress against the plan, develops corrective actions, and reviews the quality of both project processes and project deliverables.

• **Salesperson**—An extension of the Persuader and Coach roles, but this role is focused on “selling” the benefits of the project to the organization, serving as a “change agent,” and inspiring team members to meet project goals and overcome project challenges.

### Key Skills of Project Managers

Although a broad range of skills is needed to effectively manage the people, process, and technical aspects of any project, it becomes clear there is a set of key skills that each project manager should have. Although these skill categories are not necessarily exclusive of each other, let’s group them into five categories to streamline our review and discussion:

1. **Project Management Fundamentals**—The “science” part of project management, covered in this book, including office productivity suite (such as Microsoft Office, email, and so on) and project management software skills.
2. **Business Management Skills**—Those skills that would be equally valuable to an operations or line-of-business manager, such as budgeting, finance, procurement, organizational dynamics, team development, performance management, coaching, and motivation.

   **TIP** Active listening is one of the secret weapons of effective project managers.

3. **Technical Knowledge**—The knowledge gained from experience and competence in the focal area of the project. With it, you greatly increase your effectiveness as a project manager. You have more credibility, and you can ask better questions, validate the estimates and detail plans of team members, help solve technical issues, develop better solutions, and serve more of a leadership role.

4. **Communication Skills**—Because communication is regarded as the most important project management skill by the Project Management Institute (PMI), I feel it is important to separate these out. Skills included in this category include all written communication skills (correspondence, emails, documents), oral communication skills, facilitation skills, presentation skills, and—the most valuable—active listening. Active listening can be defined as “really listening” and the ability to listen with focus, empathy, and the desire to connect with the speaker.

   **NOTE** The specific combination of skills that are required for a project manager to be successful on a given project vary depending on the size and nature of the project. For example, as a general rule, on larger projects, technical knowledge is less important than competence in the other skill categories.

5. **Leadership Skills**—This category overlaps with some of the others and focuses on the attitude and mindset required for project management. However, it also includes key skills such as interpersonal and general people relationship-building skills, adaptability, flexibility, people management, degree of customer orientation, analytical skills, problem-solving skills, and the ability to keep the big picture in mind.

   **NOTE** In PMBOK Guide – Sixth Edition, PMI combines these key skill sets into three groups in the PMI Talent Triangle (shown in Figure 3.2):
Technical project management—The knowledge, skills, and behaviors related to specific domains of project, program, and portfolio management. The technical aspects of performing one’s role.

Leadership—The knowledge, skills, and behaviors needed to guide, motivate, and direct a team, to help an organization achieve its business goals.

Strategic and business management—The knowledge of and expertise in the industry and organization that enhances performance and better delivers business outcomes.

I know, I know...after reading this, you are probably thinking either one or more of the following:

- “You must be kidding! I need to be good in all those areas to manage a project?”
- “Wait! I’ve been on projects before, and I’ve yet to see a project manager who could do all that.”
- “Wait, you must be kidding! If anyone was excellent in all those areas, they’d be a CxO of our company.”

To help answer all these questions, please understand two important observations:

1. Many projects are not successful.
2. You do not need to get an “A” in all these categories to be successful as a project manager.

The key is that the project manager has the right mix of skills to meet the needs of the given project. In addition, a self-assessment against these skill categories enables you to leverage your strengths, compensate for your deficiencies, and focus your self-improvement program.

Qualities of Successful Project Managers

Given the many roles played by a project manager, the broad range of skills needed, and the inherent challenges in successfully delivering a project, we need to find ways to accelerate the learning process. Two key ways to accelerate our learning are understanding the qualities of successful project managers and understanding the common mistakes made by project managers.
Successful project managers do not share personality types, appearances, or sizes, but they do share three important features:

1. They excel in at least two of the five key skill categories (Project Management Fundamentals, Business Management Skills, Technical Knowledge, Communication Skills, Leadership Skills) and are either good enough in the other categories or staff their teams to compensate for their deficiencies.

2. They avoid the common mistakes described in the next section.

3. They bring a mindset and approach to project management that is best characterized by one or more of the following qualities:
   - **Takes ownership**—Takes responsibility and accountability for the project; leads by example; brings energy and drive to the project; without this attitude, all the skills and techniques in the world will only get you so far.
   - **Savvy**—Understands people and the dynamics of the organization; navigates tricky politics; has the ability to quickly read and diffuse emotionally charged situations; thinks fast on his feet; builds relationships; leverages personal power for benefit of the project.
   - **Intensity with a smile**—Balances an assertive, resilient, tenacious, results-oriented focus with a style that makes people want to help; consistently follows up on everything and their resolutions without annoying everyone.
   - **Eye of the storm**—Demonstrates ability to be the calm eye of the project hurricane; high tolerance for ambiguity; takes the heat from key stakeholders (CxOs, business managers, and project team); exhibits a calm, confident aura when others are showing signs of issue or project stress.
   - **Strong customer-service orientation**—Demonstrates ability to see each stakeholder’s perspective; able to provide voice of all key stakeholders (especially the sponsor) to the project team; has strong facilitation and collaboration skills; and has excellent active listening skills.
   - **People-focused**—Takes a team-oriented approach; understands that methodology, process, and tools are important, but without quality people it’s very difficult to complete a project successfully.
   - **Always keeps “eye on the ball”**—Stays focused on the project goals and objectives. There are many ways to accomplish a given objective, which is especially important to remember when things don’t go as planned.
• **Controlled passion**—Balances passion for completing the project objectives with a healthy detached perspective, which enables him to make better decisions, to continue to see all points of view, to better anticipate risks, and to better respond to project issues.

• **Healthy paranoia**—Balances a confident, positive outlook with a realism that assumes nothing, constantly questions, and verifies everything.

• **Context understanding**—Understands the context of the project—the priority that your project has among the organization’s portfolio of projects and how it aligns with the overall goals of the organization.

• **Looking for trouble**—Constantly looking and listening for potential risks, issues, or obstacles; confronts doubt head-on; deals with disgruntled users right away; understands that most of these situations are opportunities and can be resolved upfront before they become full-scale crisis points.

### 15 Common Mistakes of Project Managers

Although we review many of the common errors made in each of the fundamental areas of project management throughout this book (so you can avoid them), understanding the most common project management mistakes helps focus our efforts and helps us to avoid the same mistakes on our projects. The following are some of the most common mistakes made by project managers:

1. Not clearly understanding how or ensuring that the project is aligned with organizational objectives.
2. Not properly managing stakeholder expectations throughout the project.
3. Not gaining agreement and buy-in on project goals and success criteria from key stakeholders.
4. Not developing a realistic schedule that includes all work efforts, task dependencies, bottom-up estimates, and assigned leveled resources.
5. Not getting buy-in and acceptance on the project schedule.
6. Not clearly deciding and communicating who is responsible for what.
7. Not utilizing change control procedures to manage the scope of the project.
8. Not communicating consistently and effectively with all key stakeholders.
9. Not executing the project plan.
10. Not tackling key risks early in the project.
11. Not proactively identifying risks and developing contingency plans (responses) for those risks.
12. Not obtaining the right resources with the right skills at the right time.
15. Insufficiently managing and leading the project team.

**THE ABSOLUTE MINIMUM**

At this point, you should have a high-level understanding of the following:

- The different roles played by the project manager
- The five key skill areas every project manager should master
- The common qualities of successful project managers
- The common mistakes made by project managers
The map in Figure 2.1 summarizes the main points we reviewed in this chapter.

**FIGURE 2.1**
Project manager overview.
This page intentionally left blank
absorption of projects, 322
AC (Actual Costs), 148
acceptance criteria, 62
acceptance of risk, 199
accountability, 152
accuracy levels for work estimation, 99
acquisition of resources, 63
action, 138
active listening, 26
Actual Costs (AC), 148
agendas (meeting), 252
agile project management, 382–386
aligner role, 227
alignment of projects, 35, 294
allocation of resources, 116–117
Alternative Project Approaches section (Project Definition documents), 51
analogous (top-down) estimating, 97
Approvals section (change request forms), 164
archive folders, 179–180
assigned resources, displaying in Microsoft Project, 350
assignments, 283–284
assumptions
avoidance of, 266
defined, 209
document assumptions, 50, 126
tracking, 166
Assumptions section (Project Definition documents), 50
audio conferencing, 249
auditors (QA), 143, 208, 218
Audits section (CM Plans), 181
autolinked tasks (Microsoft Project), 338
avoidance of risk, 199
BAC (Budget at Completion), 148
backlogs, 384
backups, repository, 178
baselines
establishing, 141, 176
in Microsoft Project, 329, 336
resetting, 146, 152
best practices
configuration management, 175–180
issue management, 191–192
Microsoft Project, 337–343
project communications communications option, 247–250
email and text-only communication, 250–251
general communications management, 245–247
buffers
efficiency of, 396
feeder buffers, 395
including in budgets, 126
monitoring flow of, 396
project buffers, 395
resource buffers, 395
build/release process, 178
Bulldog role, 25
business management skills, 26
business risk factors, 204
buyer organizations, management of, 307–309

Index
calendars (Microsoft Project), 328–330

calmness under pressure, 28

canceled projects, 146

cancelled projects, 322

CAPM (Certified Associate Project Management Professional), 401

CCB (change control board), 164

CCPM (critical chain project management), 100, 394–396

central information repository establishing, 175

updating, 319

certification (PMP), 18

eligibility for, 408

exam tips
“context” differences, 408–409

exam preparation strategies, 416–417

exam topics not covered by PMBOK, 415

exam-taking tips, 417–418

“experience” differences, 409–410

key resources, 419

overview of, 407–408

PMI PMP Examination Content Outline, 416

PMI’s vision of project management, 411–412

question types and formats, 414–415

summary of, 419

terminology differences, 410–411

types of, 401–402

value of, 401–402

Certified Associate Project Management Professional (CAPM), 401

challenges of project management

difficult resources, 368–369

hard milestone data, 365–367

lack of schedule detail, 364–365

project management “lite” cultures, 362–364

resource turnover, 369–370

testing process, 375–378

vendor selection, 370–375

change (project)

CCB (change control board), 164

challenges of, 166–167

change control management

change control plans, 70 defined, 138

lack of, 37

change request forms, 163–164

change request tracking logs, 164

configuration management, relationship with, 157–158

defined, 156

impact of, 37, 202

management fundamentals for, 159–160

minimizing, 164–166

organizational change management, relationship with, 157–158

overview of, 155–156

project change control systems

components of, 163–164

defined, 156

guidelines for, 162

principles of, 162

scope creep and, 155–156

summary of, 169

types of, 157

unplanned scope changes, causes of, 160–161

change control board (CCB), 164

Change Information section (change request forms), 163

change requests

forms, 42, 163–164

tracking logs, 164

Change Working Time option (Microsoft Project), 339

charters (team), 282

charts

Gantt charts, 119, 410

milestone charts, 41, 119

project organization charts, 41, 67–68

checklists

project definition checklist, 52–55

project end checklist, 318

project plan checklist, 72

value of, 217

checkpoints, 142

clarity, importance of, 36, 152, 243, 278

client acceptance,
documenting, 318–319

Closing process group, 11.

See also closure, project

closure, meeting, 253

closure, project

challenges of, 320–321

checklist for, 318

contract termination, 321–322

key principles, 318

overview of, 317

project termination, 322

summary of, 324

CM Plans, 70, 172, 180–181

coach role, 24, 227

collaboration, 16

collaborative development, 384

fostering on project teams, 281

project/team collaboration tools, 250

tools for

building issue logs with, 190

web-based project management, 396–398

collapse of projects, 322

color-coding reports, 252

commitment

of project teams, 278

from resource managers, 293–294
How can we make this index more useful? Email us at indexes@quepublishing.com
dependencies, 340
defeaters, 335
Gantt Bar format, 333
Group By feature, 335–336
milestones, 339
new project best practices, 337–343
Office 365 Planner, 356–357
overview of, 325–329
Project 2010, 352–354
Project 2013, 355
Project 2016, 356
Project Online, 355
project scheduling with, 349–351
reporting, 343–349
resource leveling, 341–342
Show Outline feature, 335
sum of, 359
task display, 333
task duration, 328
timescale, 334
version comparison, 357
visual indicators, 331–333
WBS (work breakdown structure), 334–335
pros and cons of, 190

dates, entering into Microsoft Project, 327, 337
defects, 209
definitive accuracy level, 99
deliverables, managing
advantages of, 173–174
best practices, 175–180
challenges of, 182
configuration management plans, 172, 180–181
defined, 172
deliverable summary, 42
deliverable trackers, 177
managing to, 364–365
overview of, 171–172
pre-verifying, 220
principles of, 174–175
summary of, 184
dependencies
defined, 209
in Microsoft Project, 340
deployments
product/system release
deployment process, 178
verifying, 208
detection, 137
deterioration of projects, 322
development versus
operations, 179
diagrams, network, 120
differences, managing, 290–301

cross-cultural projects, 296
cross-functional projects, 293–295
management principles, 290–293
virtual projects, 296–299
difficult resources, managing, 368–369
direct audio (telephone)
communication, 248
directory structure, 176
Directory Structure section
(CM Plans), 180
discipline, 187
displacement of projects, 322
disposal costs, 129
distributed teams, 151
documents
assumptions, 126
Project Definition
documents, 40, 48
optional elements, 51–52
required elements, 49–50
validating, 62
project plans
alternate terms for, 410
building, 62–70
checklist for, 72
description of, 81
key principles, 58–60
overview of, 42, 57–58
questions to ask, 60–62
review and acceptance
process, 72
rolling wave planning, 58
summary of, 74
supplemental
components, 70–72
double reverse logic questions
(PMP exam), 414
Drawing Tools (Project 2010), 354
dysfunctional relations, 294

drawings, 354

e
EAC (Estimate at Completion), 148
Earned Value (EV), 148
Earned Value Management
(EVM), 146–150, 396
effective leadership, elements
of, 230–233
effort distribution estimating, 97
e-mail (electronic mail), 248,
250–251
end dates, entering into
Microsoft Project, 327, 337
ending projects
challenges of, 320–321
checklist for, 318
contract termination, 321–322
key principles, 318
overview of, 317
project termination, 322
summary of, 324
epic scope, 384
equipment costs, 128
escalation procedures,
143–144, 188
Estimate at Completion
(EAC), 148
Estimate to Complete
(ETC), 148
estimating project work
accuracy levels, 99
best practices, 100–101
challenges of, 17
common problems with,
95–97
methods of, 98–99
overview of, 91–92
risk management and, 94–95
role in overall planning
process, 92–94
INDEPENDENT QA AUDITORS

How can we make this index more useful? Email us at indexes@quepublishing.com

summary of, 103
requirements management, 270–273
ETC (Estimate to Complete), 148
summary of, 275
EV (Earned Value), 148
value of, 258
exam tips (PMP)
“experience” differences, 409–410
exam preparation strategies, 416–417
evaluation process (vendors), 373–374
effort, 409–410
EVM (Earned Value Management), 146–150, 396
key PMI assumptions and themes, 412–413
exam topics not covered by PMBOK, 415
key resources, 419
exam-taking tips, 417–418
overview of, 407–408
facilitating meetings, 252
PMI PMP Examination Content Outline, 416
gatekeepers, 175
governing process, 393–394
PMI’s vision of project management, 411–412
glossary of, 442–445
PMI’s vision of project management, 411–412
question types and formats, 414–415
summary of, 419
terminology differences, 410–411
exception-based reporting, 252
Executing process group, 11
execution of projects, 261–264
expectation management components of, 260–265
control and execution elements, 268
expectation management components of, 260–265
kickoff meetings, 268–270
planning elements, 266–267
principles of, 265–266
for project control, 140
for project quality, 216
for project teams, 279
reality/perception balance, 259
gatekeepers, 175
General communications management, 245–247
Goals and Objectives section (Project Definition documents), 49
gold-plating, 222
governance process, 393–394
Greenleaf, Robert, 234
Group By feature (Microsoft Project), 335–336
groups, process, 10–13

H

hammock tasks, 351
hard milestone data, 365–367
headers (Microsoft Project), 339
Health Insurance Portability and Accountability Act (HIPAA), 386–388
healthy paranoia, 196
Help menu (Microsoft Project), 327
heuristic estimating, 97
hidden work, 151
high-maintenance staff, 286
high-performing teams, traits of, 278
HIPAA (Health Insurance Portability and Accountability Act), 386–388
historical information, 98

I

Identification section (change request forms), 163
impact assessment, 163, 198, 261–263
Impact Assessment section (change request forms), 163
independent QA auditors, 143, 218

Gantt Bar format (Microsoft Project), 333, 344
Gantt charts, 119, 333, 344, 410
Gantt, 119, 333, 344, 410
initial budget development, 130
Initiating process group, 11
instant messaging, 249
integration management, 13
interim milestones, 367
interpersonal skills, 252–253
issue data points, 188–189
issue logs, 188–191
administrators, 188
issue data points, 188–189
special situations in, 192–193
tools for, 189–190
visibility of, 192
issue management
best practices, 191–192
defined, 139
escalation procedures, 188
issue logs, 188–191
issue resolution, 152
objectives of, 186–187
overview of, 185–186
principles of, 186–187
process of, 188
risk management, 209
special situations in, 192–193
summary of, 194
iterative development, 382
iterative process, budgets and, 125

J-K
Keyword Conventions section (CM Plans), 181
keywords, 176, 181
kickoff meetings, 268–270, 282, 294
knowledge areas (PMBOK Guide), 13

L
labor costs, 128, 132
leadership skills
for cross-functional projects, 296

M
management. See project management
management reserve, 126
management support, lack of, 35
marketability, improving, 280
materials, bill of (BOM), 83
materials costs, 129
meetings
best practices, 252–253
daily standup, 384
kickoff meetings, 268–270, 282, 294
retrospectives, 385
status meetings, 141
time management in, 282
virtual meetings, 298
memorization questions (PMP exam), 414
Microsoft Office 365 Planner, 356–357
Microsoft Project
autolinked tasks, 338
baselines, 329, 336
calendars, 328–330
Copy Picture function, 334, 345
custom fields, 330
date entry, 327, 337
default settings, 329, 337
dependencies, 340
filters, 335
Gantt Bar format, 333
Group By feature, 335–336
milestones, 339
new project best practices, 337–343
Office 365 Planner, 356–357
overview of, 325–326
Project 2010, 352–354
Project 2013, 355
Project 2016, 356
Project Online, 355
project scheduling with, 349–351
reporting, 343–349
resource leveling, 341–342
Show Outline feature, 335
summary of, 359
tables, 327–329
task display, 333
task duration, 328
timescale, 334
version comparison, 357
visual indicators, 331–333
WBS (work breakdown structure), 334–335
Microsoft Project files, 59
milestones
hard milestone data, 365–367
importance of, 142
interim milestones, 367
managing to, 364
in Microsoft Project, 339
milestone charts, 41, 119
Mindjet MindManager, 115
mind-mapping tools, 399–400
minimizing
project change, 164–166
scope changes, 159–160
minutes of meetings, 253
mitigation of risk, 200
modified WBS (work
breakdown structure), 120
Monitoring and Controlling
process group, 11, 137.
See also project control
monitoring risk, 199
Move Project feature (Project
2010), 354
mutual agreement, contract
termination by, 322

N

NDA (nondisclosure
agreements), 374
network diagrams, 120
New Tasks Created Scheduling
Option to Auto Schedule set-
ing (Microsoft Project), 339
nondisclosure agreements
(NDA), 374
notebooks, project, 43
note-taking during meetings,
253

O

OBS (Organizational Breakdown
Structure), 83
Office 365 Planner, 356–357
offline resources, 20, 419
operational costs, 129
operations
versus development, 179

P

Page Setup (Microsoft Project),
339, 345
parametric estimating, 98
paranoia, 29
Parkinson’s Law, 395
passion, controlled, 29
paste feature (Project 2010), 354
PBS (Project Breakdown
Structure), 83
PDA (prevention, detection,
and action), 137–138
PDF output (Project 2010), 354
people-focused project
management, 28, 384
perception/reality balance, 259
performance of project teams
high-performing teams,
traits of, 278
management principles for,
278–281
overview of, 277–278
performance evaluations, 320
problem situations with,
285–286
summary of, 288
team differences, 290–301
cross-cultural projects, 290–301
cross-functional projects,
292–295
management principles
for, 290–293
summary of, 301
virtual projects, 296–299
techniques for, 282–285
performance reporting, 138,
144–145
Personally Identifiable
Information (PII), 387
persuader role, 24
PERT (weighted average), 98
PfMP (Portfolio Management
Professional), 401
PgMP (Program Management
Professional), 401
phased deployment,
208, 367, 383
phased estimating, 98
PHI (Protected Health
Information), 387
PII (Personally Identifiable
Information), 387
plan-do-review model, 383
Planned Value (PV), 148
planner role, 24, 227
Planning process group, 11.
See also plans
plans
communications plans,
41, 242–243
configuration management
plans, 180–181
expectation management,
266–267
inadequate planning, 37

How can we make this index more useful? Email us at indexes@quepublishing.com
Planning process group, 11
project plans, 42
alternate terms for, 410
building, 62–70
checklist for, 72
description of, 81
key principles, 58–60
overview of, 57–58
questions to ask, 60–62
rolling wave planning, 58
summary of, 74
supplemental components, 70–72
quality management plans, 42, 216, 219
relationship with project definition, 47
response plans, 198
risk management plans, 71, 201
risk response plans, 42
staffing management plans, 42
team planning, 279
work plans, 82
PMBOK Guide - Sixth Edition, 3, 10
exam topics not covered by PMBOK, 415
knowledge areas, 13
PMI Talent Triangle, 26–27
process groups, 10–13
updates to, 13
PMI (Project Management Institute). See also PMBOK Guide - Sixth Edition; PMP (Project Management Professional) certification
description of, 10
projects, 9
standards documents, 19–20
Talent Triangle, 26–27
vision of project management, 411–412
website, 10
PMI-ACP (PMI Agile Certified Practitioner), 382
PMI-PBA (PMI Professional in Business Analysis), 401
PMI-RMP (PMI Risk Management Professional), 401
PMI-SP (PMI Scheduling Professional), 401
PMOs (project management offices), 105
responsibilities of, 388–390
successful PMOs, traits of, 390–392
PMP (Project Management Professional) certification, 18
eligibility for, 408
exam tips
“context” differences, 408–409
tax examination strategies, 416–417
tax examination topics not covered by PMBOK, 415
tax examination tips, 417–418
“experience” differences, 409–410
key resources, 419
overview of, 407–408
PMBOK, 415
PMI’s vision of project management, 411–412
question types and formats, 414–415
summary of, 419
terminology differences, 410–411
types of, 401–402
value of, 401–402
point person role, 24, 227
Policies and Standards section (Project Definition documents), 51
political implications of communication, 244
Portfolio Management Professional (PgMP), 401
PPM (Portfolio Project Management), 48, 392–393
Preliminary Cost, Schedule, and Resource Estimates section (Project Definition documents), 51
preliminary schedules, building, 115–116
presenting project schedules, 119–120
prevention, 137
pre-verifying deliverables, 220
price wars, 36
priorities
focus on, 139
risk, 198
privacy, 386–388
proactive communication, 244
proactive project management, 59
probability
determining, 197
probability/impact matrix, 201
problem solver role, 227
Process and Procedures section (CM Plans), 181
process groups (PMBOK Guide), 10–13
procurement management, 139
description of, 13
plans, 71
productivity, facilitating, 279
product/system release deployment process, 178
profiles, risk, 197, 201
Program Management Professional (PgMP), 401
progress tracking, 38
Project. See Microsoft Project
project alignment, 294
project approach, 54
Project Breakdown Structure (PBS), 83
project budgets
challenges of, 131–132
finalizing, 130–131
impact of, 124–125
initial budget development, 130
overview of, 123–124
planning, 126–127
principles of, 125–126
as source of risk, 205
sources of project costs, 127–129
summary of, 133
project buffers, 395
Project calendars (Microsoft Project), 328–329
project cancellation, 146
project change
CCB (change control board), 164
challenges of, 166–167
change request forms, 163–164
change request tracking logs, 164
configuration management, relationship with, 157–158
defined, 156
management fundamentals for, 159–160
minimizing, 164–166
organizational change management, relationship with, 157–158
overview of, 155–156
project change control systems
components of, 163–164
defined, 156
guidelines for, 162
principles of, 162
scope creep and, 155–156
summary of, 169
types of, 157
unplanned scope changes, causes of, 160–161
project change control systems
components of, 163–164
defined, 156
guidelines for, 162
principles of, 162
project charters, 40, 410
project closure
challenges of, 320–321
checklist for, 318–320
contract termination, 321–322
key principles, 318
overview of, 317
project termination, 322
summary of, 324
project communications
challenges of, 240–242
communications option, 247–250
defined, 238–239
description of, 13
e-mail and text-only communication, 250–251
general communications management, 245–247
importance of, 240
interpersonal skills, 252–253
meetings, 252–253
overview of, 237
planning, 242–243
political implications of, 244
principles of, 242–244
proactive communication, 244
push/pull, 246
status reporting, 251–252
summary of, 255
Project Context section (Project Definition documents), 49
project control
action, 138
challenges of, 150–151
components of, 138–139
defined, 136–137
detection, 137
EVM (Earned Value Management), 146–150
management fundamentals for, 139–140
overview of, 135–136
performance reporting, 144–145
prevention, 137
project recovery, 151–152
summary of, 154
techniques for, 141–144
variance responses, 146
Project Definition documents, 40, 48
required elements, 49–50,
51–52
validating, 62
project definition process
checklist, 52–55
project definition checklist, 52–55
Project Definition documents, 48
recommended additions to, 51–52
required elements, 49–50
questions to ask, 46
relationship with project planning, 47
as source of risk, 205
summary of, 56
project deliverables, managing
advantages of, 173–174
best practices, 175–180
challenges of, 182
configuration management plans, 172, 180–181
defined, 172
deliverable trackers, 177
overview of, 171–172
principles of, 174–175
summary of, 184
Project Dependencies section (Project Definition documents), 49
project end checklist, 318
project execution, expectation management and, 261–264
project impact, 261–263
Project Information dialog (Microsoft Project), 337
project issue management
best practices, 191–192
escalation procedures, 188
issue logs, 188–191
objectives of, 186–187
overview of, 185–186
principles of, 186–187
process of, 188
special situations in, 192–193
summary of, 194
How can we make this index more useful? Email us at indexes@quepublishing.com
PROJECT LOGS

project logs, 42, 164

project management
CCPM (critical chain project management), 394–396
challenges of, 15–17
difficult resources, 368–369
hard milestone data, 365–367
lack of schedule detail, 364–365
project management “lite” cultures, 362–364
resource turnover, 369–370
testing process, 375–378
vendor selection, 370–375
definition of, 8
demand for, 17–18
key aspects of, 10
knowledge areas, table of, 13
online resources, 20
portfolio project management, 48
process groups, 10–13
as source of risk, 204–205
summary of, 21, 380
training, 402–403
trends in, 18–19
triple constraint of, 16
value of, 14–15
web-based project management, 396–398

Project Management Institute.
See PMI (Project Management Institute)

project management “lite” cultures, 362–364

project management offices.
See PMOs (project management offices)

Project Management Professional (PMP)
certification. See PMP (Project Management Professional)
certification

project managers
common mistakes of, 29–30
inadequate managers, 37

key roles of, 24–25, 226–227
key skills of, 25–27
qualities of, 27–29, 227–228
summary of, 31
tools for, 40–43
project notebooks, 43
project organization charts, 41,
67–68
project phases, managing to, 365
project plans
alternate terms for, 410
building, 62–70
checklist for, 72
description of, 81
key principles, 58–60
overview of, 42, 57–58
questions to ask, 60–62
review and acceptance process, 72
rolling wave planning, 58
summary of, 74
supplemental components, 70–72
project quality management challenges of, 221–223
description of, 13
overview of, 213–214
principles of, 215–217
quality defined, 214–215
strategies for, 220–221
summary of, 224
tools and techniques for, 217–219
project recovery, 151–152
project repositories. See repositories
project schedules, 13, 41
challenges of
hard milestone data, 365–367
lack of schedule detail, 364–365
compared to WBS (work breakdown structure), 79–82
creation process, 112–113
description of, 81
goals of, 110
impact of, 106–109
key inputs for, 110–111
in Microsoft Project, 349–351
overview of, 105–106
preliminary schedules, building, 115–116
presenting, 119–120
reality checks, performing, 116–117
scheduling software, 115
shortening, 117–118
short-term schedules, 383
as source of risk, 203, 205
summary of, 121
task relationships, determining, 113–115
walking through, 118–119
project scope management, 13
project size, as source of risk, 202
Project Solver role, 24
project sponsors, 36, 202
project teams
high-performing teams, traits of, 278
management principles for, 278–281
overview of, 277–286
problem situations with, 285–286
project/team collaboration tools, 250
as source of risk, 203
summary of, 288
team differences
cross-cultural projects, 296
cross-functional projects, 292–295
key principles for, 290–293
management principles for, 290–293
summary of, 301
virtual projects, 296–299
techniques for, 282–285
project termination, 322
projects, definition of, 8
Protected Health Information (PHI), 387
risk registers, 201
sources of risk, 201–205
strategies for, 208
summary of, 211
terminology, 209
tools for, 200–201
unacknowledged risks, 206
undetected risks, 206
work estimation and, 94–95
risk profiles, 197, 201
risk response plans, 42
Risks section (Project Definition documents), 50
roles
of project managers, 24–25, 226–227
updating in project plans, 65–67
Roles and Responsibilities section (CM Plans), 181
rolling wave planning, 58

S
salesperson role, 227
scale of project, 139
schedule management, 13, 41
challenges of
hard milestone data, 365–367
lack of schedule detail, 364–365
description of, 13
in Microsoft Project, 349–351
project schedules
creation process, 112–113
description of, 81
goals of, 110
impact of, 106–109
key inputs for, 110–111
overview of, 105–106
preliminary schedules, building, 115–116
presenting, 119–120
reality checks, performing, 116–117
shortening, 117–118
as source of risk, 203, 205
summary of, 121
task relationships, determining, 113–115
walking through, 118–119
resource schedules, updating, 320
scheduling software, 115
short-term schedules, 383
Schedule Performance Index (SPI), 148
Schedule Variance (SV), 148
scheduling software, 115
scope creep, 155–156
scope management, 13
big-picture scope, 385–386
description of, 13
project definition checklist, 53–54
scope changes, minimizing, 159–160
scope creep, 155–156
unplanned scope changes, causes of, 160–161
Scope Specifications section (Project Definition documents), 49
SCRUM, 385
security, 386–388
selection process (vendors), 370–375
self-control, 233
seller organizations, management of, 310
The Servant as Leader (Greenleaf), 234
servant leadership approach, 234–235, 291
shortening project schedules, 117–118
short-term schedules, 383
Show Outline feature (Microsoft Project), 335
Show Project Summary Task checkbox (Microsoft Project), 337
signoffs, 142
situational questions (PMP exam), 414
SMART goals, 52
SMEs (subject matter experts), 385
smoke tests, 222
social networking tools, 250
SPI (Schedule Performance Index), 148
sponsorship, project, 202, 293
spreadsheets, 190
sprints, 384, 386
staffing management plans, 42
stakeholders
analysis of, 245
buy-in, 36
definition of, 14
educating, 159
engagement of, 165
expectation management components of, 260–265
control and execution elements, 268
kickoff meetings, 268–270
principles of, 265–266
project planning elements, 266–267
reality/perception balance, 259
requirements management, 270–273, 275
value of, 258
management of, 13
perspective of, 231
project definition checklist, 54
as source of risk, 202
Stakeholders section (Project Definition documents), 50
standards
quality standards, 218
standards documents, 19–20
start dates, entering into
Microsoft Project, 327, 337
status checks, frequency of, 152
Status Information section (change request forms), 164
status meetings, 141
status reports, 41, 251–252
stories, 384
story problem questions (PMP exam), 414
strategic and business management, 27
student syndrome, 395
subject matter experts (SMEs), 385
Success Criteria section (Project Definition documents), 49
suppliers. See vendor management
Status Information section (change request forms), 164
status meetings, 141
status reports, 41, 251–252
stories, 384
story problem questions (PMP exam), 414
strategic and business management, 27
student syndrome, 395
subject matter experts (SMEs), 385
Success Criteria section (Project Definition documents), 49
suppliers. See vendor management
T&M (Time and Materials) contracts, 312–314
Table menu (Microsoft Project), 327
tables (Microsoft Project), 327
Talent Triangle, 26–27
targets, identifying, 216
Targets section (CM Plans), 180
Task calendars (Microsoft Project), 328–329
Task Display format (Microsoft Project), 333
Task Inspector (Project 2010), 353
tasks
assignments, 283–284
defined, 384
duration, 328
entering into Microsoft Project, 339
hammock tasks, 351
relationships, determining, 113–115
Tasks Will Always Honor Their Constraint Dates checkbox (Microsoft Project), 338
teacher role, 233
team (consensus) estimating, 99
Team Planner (Project 2010), 354
teams
high-performing teams, traits of, 278
management principles for, 278–281
overview of, 277–278
problem situations with, 285–286
project/team collaboration tools, 250
as source of risk, 203
summary of, 288
team differences
cross-cultural projects, 296
cross-functional projects, 292–295
key principles for, 290–293
management principles for, 290–293
summary of, 301
virtual projects, 296–299
techniques for, 282–285
technical project management, 27
technology
as source of risk, 203
technical difficulties, impact of, 38
technical knowledge, 26
telephone communication, 248
templates, 218
terminating contracts, 321–322
projects, 322
terminology differences, 410–411
testing process, 375–378
prioritizing, 221
risk management and, 208
smoke tests, 222
text wrap (Project 2010), 354
texting, 249
text-only communication, 250–251
Time and Materials (T&M) contracts, 312–314
timeboxing, 383
timeline summary, 119
Timeline View (Project 2010), 352
time-phased budgets, 125
timescale (Microsoft Project), 334, 345
time-zone conventions, 298
tools
collaboration tools
building issue logs with, 190
web-based project management, 396–398
mind-mapping tools, 399–400
project/team collaboration tools, 250
requirements management tools, 398–399
risk management tools, 200–201
social networking tools, 250
tools section (CM Plans), 181
top-down (analogous) estimating, 97
top-down summary tasks (Project 2010), 353
total lifecycle, budgets and, 125
tracking deliverables, 177
training, 129, 402–403
transference of risk, 200
travel costs, 129
triple constraint of project management, 16
troubled projects, common reasons for, 35–38
trust
earning, 231
in project teams, 278
turnover, managing, 369–370

How can we make this index more useful? Email us at indexes@quepublishing.com
umbrella role, 24, 227
unacknowledged risks, 206
undetected risks, 206
unique identification numbers, 164
unplanned scope changes, 160–161
unstated expectations, 271
updating resource schedules, 320
user-controlled scheduling (Project 2010), 352–353

V
V method, 143, 219
variance analysis, 146–150
variance management plans, 72
variance responses, 146
vendor management
    buyers, 307–309
    contracts, 311–314
    management principles for, 304–307
    overview of, 303–304
    sellers, 310
    skills for, 311
    summary of, 316
    vendor selection, 370–375
    vendors as source of risk, 203
verification
    of deployments, 208
    importance of, 217
version numbering, 176
video conferencing, 248
virtual projects, 296–299
virtual teams, 151
visibility, 152
visual indicators (Microsoft Project), 331–333
Visual Scope Summary section (Project Definition documents), 52
visualizing goals, 231
voice mail, 248
work breakdown structure.
    See WBS (work breakdown structure)
work decomposition process, 85
work estimation
    accuracy levels, 99
    best practices, 100–101
    challenges of, 17
    common problems with, 95–97
    methods of, 98–99
    overview of, 91–92
    risk management and, 94–95
    role in overall planning process, 92–94
    summary of, 103
    techniques for, 97–98
work packages, 141, 218
work plans, 82
work products, 261–263
workflow process, 294

X-Y-Z
XP (extreme programming), 385
XPS output (Project 2010), 354