WHAT THEY DIDN'T TELL YOU ABOUT PROJECT MANAGEMENT IN CLASS

ROBIN VYSMA

What they didn't tell you about PROJECT MANAGEMENT in class

'Project Manager' featured in my job description for over 10 years before, in the aftermath of a derailed project, I began to understand the role. I've decided that most of what I'd been taught was not only unhelpful, but a distraction. There's no silver bullet but it would help if we started aiming in the right direction.

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About the author

Robin Vysma became an IT professional graduating from the Queensland University of Technology in August 1988. He served as a developer for the Australian Bureau of Statistics, as the IT manager for the Defence Security Branch in Canberra and as the manager of the Eastern Regional Information Centre, which he established for St John of God Health Care, in Ballarat.

Robin holds a Master of Technology (Computing) from Swinburne, a certificate in management from The Australian Institute of Management and a Cert IV in Workplace Assessment and Training.

He has had formal training in project management from the Australian Institute of Management and with the Thomsett company through the Australian Computer Society.

He has overseen a number of multi-million dollar IT projects in the health and defence industries with an enviable record of success.

</About the author>

Preface

Ever had the feeling that you came from a different planet? Most of us grow out of it. It's taken me a little longer. The discovery of Asperger's Syndrome in my family goes a long way to explain me, or at the very least, it makes a good excuse. I'm well past mid-life and still trying to figure out what I want to be when I grow up. For a while I considered myself a sophisticated business person and even gave serious thought to doing a Masters in Business Administration, but no. I got into management because a few bosses in my career saw in me a talent for fixing things that made it worth enduring my abrupt and self-obsessed personality. (I've heard it a few times).

I've spent most of my career fixing projects that were going horribly wrong. In the last few years I've been developing methodologies for clients to address the reasons their projects have been going wrong. I no longer want to be a project manager but I don't want the lessons I've learned to go to waste.

This is simply an account of my experience; the lessons learned and the opinions that I've accumulated in fifteen years of managing projects. This is not a text book, nor is it a passionate call to arms. The revolution that I propose is necessary and starts with a mind shift. That's all I'm prepared to

advocate at this stage. We need to look at how we go about selecting and monitoring projects from a completely different angle. There is no silver bullet, at least not in this book. There are some answers but this is mostly about asking the right questions because clearly at the moment we are not. It is my hope that at some point in time we will learn how to manage projects better because the amount of money wasted on failed projects could literally feed the world.

For struggling project managers this might just help you regain control of your project. For ambitious up-and-coming project managers it's inside information. For business managers it's a guide to selecting and working with projects and project managers and if you've ever been burnt by a project, it might just be a giggle.

For your education or amusement, this is the life I'm leaving behind.

</Preface>

Becoming PM

Me and Lisa Simpson

I was the inspiration for the character; well I could have been. I blame my first grade teacher. It seems ludicrous now but back then they ranked six year olds according to academic performance. I remember it quite clearly. "Where did I come Mrs McCord?" "You came first Robin." I spent the next twenty years convinced that I was somehow intellectually superior. I was self-righteous, somewhat musical, political and a bit outspoken. That's right, I was Lisa Simpson in drag. Anyway, the innate desire to please (and be praised?) meant that I was often focused on what needed to be done rather than the pursuit of my own dreams. That's not a sour grape. In fact, I'm not unhappy about it. It just explains how I got into project management, a point which I feel necessary to labour because I still struggle with the concept of someone setting out to become a career project manager by choice. It's like cops. I'm glad they're out there but who wants to be a cop? In any case, I'm glad some people do. Perhaps they're all accidental policemen like I was an accidental project manager.

</Me & Lisa Simpson>

Why would you?

This is the first question that I put to each new TAFE class. TAFE is somewhere between high-school and university. It's oriented more toward industry as opposed to research/academia like the universities. My students range from long term unemployed who are there because Centrelink (the social security/welfare department de jour) has decided that they need to take active steps towards becoming employable, to mature age students who are back at school because they want to change or further their careers. Then there are the kids who didn't make it into university. They come with damaged self-esteem and a pinch of bitterness. The mid-life crisis group are a little older and more worldly. They belong to the half that are actually there to learn.

The one thing that all my students have in common is that they enrolled in a technical course. They are there to learn about computers, networks and websites. They have no idea why 'Project Management' is a core subject. They are not interested and resent having to take the subject, and since traditionally the teacher taking Project Management is the one that didn't run fast enough or didn't hear clearly, the class is generally considered somewhat less than 'worth doing.'

They have to pass in order to graduate, which is a pretty strong motivator, but if they're going to take something from the class other than a line on their academic record, they need to be engaged which means it's got to be either fun or relevant. 'Fun' is a stretch. Unless you're suffering from chronic sadomasochism, I wouldn't describe project management as 'fun.' On the other hand, I have a passionate belief in the

relevance of the topic to their chosen industry. I come complete with many years of experience, and have war stories that they can relate to regarding their prospective careers.

If I want them to listen; if my classes are to have any educational value beyond honing online gaming skills; then the first question that has to be addressed is, 'Why are you here?' Why is there a 'project management' subject in the middle of a technical course?

Usually I've got a small class of between five and twenty-five students and I'm given a computer lab to teach in, so they all have computers in front of them upon which most of them are busily updating their Facebook pages. I get them to open another window and go to a job-search engine. I ask them to tell me how many information technology jobs were advertised in the last month that involve 'project management.' There are usually thousands. Then I ask them what kind of money those positions are offering. It's usually quite generous. I tell them that as they learn to understand the role, they will realise that it has little actual authority. The skills needed are not far beyond elementary clerical and the pay is practically obscene. When I finally graduated from university my brother had been an engineer for fifteen years. Within two years I was working on a defence project earning more than he was. It seems grossly unfair but it is the reason I studied computer science. Anyway, some form of formal training in project management, a project to your name with a good reference and a six figure income is a very real possibility. By this stage I've generally got one or two students hanging around after class asking about what kind of qualifications would lead to a career as a project manager. That's a good indicator that I'm a hit and it's going to be a fun semester.

I try to convince them that regardless of whether they end up in project management jobs or not, they need more than technical skills to survive office/lab politics and by the end of day one I've got a reluctant but generally attentive audience.

Of course, every silver lining has its cloud. If you like being part of a team and your working environment is like a second family then perhaps project management is not for you. As a project manager you'll often end up with a new team for each project. There's often quite a bit of friction as the team learns to work together and by the time friendships establish, it's time to move on.

Relationships

Project work puts people under stress and when there is a bond it is often intense, like the relationships born in battle. I once spent an hour walking the streets of Geelong at night in the rain holding hands with my project's vendor representative. She had been a nurse for thirty years and was what I would call 'a woman of substance.' She was a force to be reckoned with, but today her boss had berated her over the phone and, cursed be modern phone technology, the conversation was heard by all in the room. He used obscene language and ended up telling her that if she didn't take the system live she could pay for her own flights home. That was followed by the sound of an angry disconnect. To all of us in the room he was an idiot and she was in the right but it was humiliating. Just being in the room was embarrassing. She stood facing the wall with the phone still to her ear, not moving, not saying anything. Nobody moved. Nobody said anything. I happened to be standing next to her. I took the phone out of her hand and put it in

its cradle. I turned her shoulders to the door and said quietly but loud enough for the rest of the stunned mullets in the room to hear, "We're going for a walk." We walked and talked for maybe an hour. For part of the journey we held hands. We shared stories. At that moment we were close friends. We continued to work together but our friendship faded with the end of the project. I respected and admired her and I believe the converse to be true but we had little in common other than that moment in Geelong. That's not always the case, however.

My first client in the Department of Defence hated all computer people on sight. As far as she was concerned we were all a waste of air space and I was on top of her hit list. It's not hard to see why. She waited nine years for the information system that supposedly supported her office. It took five years of planning and four years programming, and it was.... not good. There was a wardrobe sized cupboard packed full of documentation but an eleven-year-old with a programming guide could have produced a better system in nine weeks let alone nine years.

This project was one of the reasons I decided that project management methodologies are best viewed with a healthy pinch of scepticism. I replaced the system but in doing so spent a lot of department money. Pauline managed the client group that would pilot my system. She had been through this process so many times she flatly refused to take part. Her staff on the other hand, played along and before long were well into it. This was in the early 1990s when desktop computers were slowly replacing 'dumb' computer terminals and although there was still no Internet, email even within the department, was seen as a very handy messaging tool. We weren't quite at the 'one computer per desk' stage but it

was deemed necessary for managers to have computers on their desks. Pauline disagreed. I had run out of logical arguments and it came down to, "Look, your boss has decided you're getting this so if you disagree, go argue with him and let me do my job." Pauline's pen bounced off the wall as she stormed out of the office. It was an open area office with thirteen desks accommodating a selection of army, navy, air force and civilian personnel but it may as well have been a primary school classroom. All eyes were on their work. You could hear breathing – mostly mine. That was almost twenty years ago. We owned a house together for many of those years. I would rate Pauline as one of my best friends. The point is, that as a PM you end up with a new team each project. There are a lot of good-byes and it's hard to tell which are forever.

</Relationships>

Scapegoat material

There's another reason why you might reconsider the decision to become a career PM. If an organisation is losing control of a project, hiring a project manager is a good idea because either of two things will happen: the project manager could fix the project and save the day or the project manager cannot bring the project back on track, in which case it can be safely reported to the board that 'We had a problem with our project manager.' Clearly the alternative scenario, that a senior company executive made a boo boo, would not warrant consideration. It is not inconceivable that you are employed specifically to be a scapegoat. While your experience as a PM may well equip you to manage your way out of the political minefield with your reputation intact, remember that you're working for

people whose executive positions are the rewards for ruthless political efficiency.

</Scapegoat material>

The focal point of all discontent

You have to be fairly thick-skinned. You may not have much in the way of actual authority or even responsibility for the work, but you are the central conduit of all information flow, which makes you the source of all news, good and bad. If something goes wrong, be it an executive decision with ridiculous practical consequences that you have to explain to the team, or your having to report to management that work has gone wrong, if the shit hits the fan it's going to hit you first. If you've done your job well it will land on whoever deserves it. If you've done your job very well, you will have averted the situation before it became an issue, but you can't always do that. When you are being shouted at you have to empathise with the shouter, feel their frustration and recognise, even if they don't as yet, that you are part of the solution and you will fix it for them. If you are inclined to react to an attack; if you are inclined to defend yourself; or if you are inclined to be hurt by a public outburst of harsh words questioning the integrity of your family lineage (yes it's happened) then perhaps a career in project management is not for you.

</The focal point of all discontent>

Because...

One evening, the owner (and General Manager) of the firm through which I consulted, called into the office to drive me home. It was three o'clock in the morning. I didn't even think to ask what he was doing out and about at that time

of night. On the way home he stopped outside a bar called Pig's R's. Strangely appropriate, I thought. He offered to buy me a drink. I needed several and since I wasn't driving I saw no cause for restraint. In the midst of our both bemoaning the insanity of the project I was supposedly managing I heard him say, "Of course if they were all competent, capable organised people they wouldn't need us; so shut up and take the money." I looked at him. He was grinning like a Cheshire cat and I was beginning to understand my role as a project manager.

To me, project management is like prostitution. You are often treated poorly, but they pay you accordingly and there's always an end date.

</Because>
</Why would you?>

Types of project managers

Vendor PM

Project management is about delivering an optimal solution to the sponsors. However, if you have a mortgage and a family dependent on your income then your primary loyalty had better be to those who sign your pay cheques. That's usually your project sponsors, sometimes indirectly. If you're having difficulty reading between the lines, here is a little nugget for sponsors, employers and people at the business end of projects. If your project involves a significant acquisition, there's a good chance that the vendor will put forward a 'Project Manager.' There's an even better chance that you will be paying handsomely for the services of the said project manager. The thought may cross your mind that project managers are expensive and 'Since I'm

already paying for one, do I need my own project manager?' If you're thinking, 'OMG of course you need your own project manager!' then skip to the next section. If you're still with me, read carefully. The optimal solution for the vendor is the one that delivers maximum return for the vendor, not you. If everything goes according to plan then you may not even notice the difference. If you think things are going to go according to plan, then keep reading. You'll get over it. When things do not go according to plan you will soon see that you have been paying the wolf to mind your sheep.

I was once asked to 'fix' a project. It was a software development and installation project that was supposed to cost sixty thousand dollars. They had spent close to a million dollars and there seemed to be no end in sight. This is what happens when you pay the vendor to manage your project for you. You need to be sure that your project manager's first loyalty is to you, which means you need to be the one paying them, not just paying for them.

I've been a vendor project manager too, for several companies. Most of the time it was fun. It ceased to be fun when I realized that what I was installing was outdated, unnecessary and sold for the purpose of trapping the client into a totally unnecessary technology commitment that would cost them dearly. The difference is that I did not have a huge mortgage nor a dependent family and I decided I would rather be unemployed. When I gave notice the client presented me a with a beautiful gift basket. They had been waiting on this system for years. I had been able to clear some obstacles and within a few months they were piloting the first implementation. They were very grateful. If only they knew the rest of the story. The bottom line is that I talk about the project manager's role in relation to

the project sponsor. If you are a vendor project manager then your sponsor is your employer and not the project sponsors.

</Vendor PM>

In house – dual hat PM

A lot of project management careers begin when a staff member is given the task to oversee a big change in the workplace. If this is you, you were probably chosen because of your subject matter expertise. They may even send you on a project management course. In this, your first project, you have two roles. One is to use your expertise to contribute to the outcome. The other is the coordination of the other contributions; project management. The trap here is that because of your subject matter knowledge you may be inclined to make estimates on behalf of other contributors, which doesn't sound unreasonable, except that the ultimate outcome of the project will depend on the knowledge and experience of the other contributors and not just yours. The trick is to remain conscious of which hat you are wearing when you make a decision.

</In house – dual hat PM>
</Types of project manager>
</Becoming PM>

The problem with how it's taught

Methodology

How do we manage things? Forgetting project management for the moment, how do we manage activities in general? A good place to start is to look at how you did things yesterday; keep and perhaps develop the bits that worked well; and change what did not go so well.

Applying that thinking to projects we need to look at past projects. Looking at past projects, it would seem that projects go through different management 'phases' but each one is a bit different. If you look at enough projects you can make a list of possible stages that a project can go through depending on its size, complexity, organisational culture, how it started etc. For the sake of completeness we'll list all possible phases. Now if we consider what happens at each of the possible phases we can provide a number of templates and guidelines which will help navigate the project through the particular phase it is in. It's quite likely that not all phases are going to apply to all projects all the time, so you need to choose the phases relevant to your project and ignore the others in order to deduce the methodology needed to manage your project. This is another way of saying that we have no idea what to do in a project but here are

lots of things that have worked for other projects in the past and some might be relevant to you. The 'toolbox' analogy is used quite a bit. It conveniently accommodates the information, project phases and document templates that are completely superfluous to your needs without discrediting the methodology as a whole.

The problem with this management methodology is that it is a deduction from a false premise and we all know that, "From a false premise, anything and nothing can be deduced." (I'm quoting my university physics lecturer. I don't know where he got it from.) Traditional management is the quantification of the known, extrapolated to make predictions of the unknown – the application of information giving rise to knowledge or wisdom leading to the much coveted competitive edge, prosperity and all things capitalistically rewarding.

When you apply tried and tested principles of management to projects, you provide a mechanism by which senior executives can put a nice healthy tick in the 'due process' box. The methodology however, ends up reducing project management into a tick-box process that any monkey and possibly the odd gifted schnauzer can do. It will guarantee that all the 'i's will be dotted and all the 't's will be crossed but will it ever deliver anything other than paperwork?

A project is an unknown. If it's been done regularly it's not a project. Looking at past projects similar to yours is absolutely invaluable. They will invariably have learned lessons that will apply to you, but the exercise is specific to your project. The generalisation of history and calling it a methodology applicable to all projects is about as sensible as betting on a coin toss. Just because the last two were 'tails' does not make it more likely that the next one is going to be 'heads.' Each event is unique, like every project.

Don't get me wrong. If I owned a consulting firm and employed a hundred project managers, I would consider using a methodology like Prince 2 to deliver a recognisable degree of uniformity and consistency, thereby developing a company 'brand' upon which I could trade. However, in my experience methodologies like Spectrum and Prince 2 are not going to help get the job done. A senior state public servant once said to me directly, "I will hire a Prince 2 certified project manager to justify my selection but I don't expect him to use it." That kind of sums it up. If it sounds like I am casting aspersions upon the management fraternity, I'm not. This particular public servant is someone that I respect as a friend and as a professional. The point is that the primary justification for the adoption of existing project management methodologies is 'What else is there?'

Project managers with Information Technology industry experience (others too but you get it a lot in IT) will be familiar with projects which deliver in stages or 'multiple releases.' Invariably, and not surprisingly, the first 'rollout' is the most chaotic. Subsequent releases (eg. version 2) go more smoothly. It's not hard to see why. The first implementation ran into lots of unforeseen problems. The resource and time estimates were inaccurate but we learn from our mistakes – and that is the basis of management as we know it. Once we have precedent we can predict, plan and 'manage.' Once we've done the first one, we can apply process management principles to subsequent rollouts. My concern and the focus of this publication is that first one. How do we protect ourselves from the seemingly inevitable chaos of the first release?

Planning, costing, resourcing, measurement, evaluation and administration in general are traditionally based on

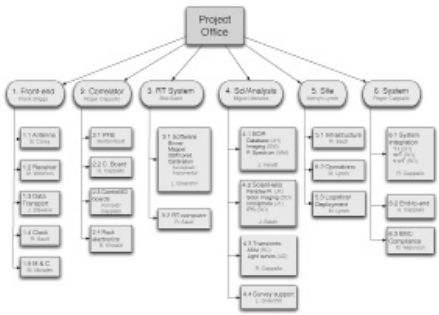
precedent. How did we do it yesterday? How much did it cost? How well did it go? If we did it badly how can we do it better next time? Project management is about management without precedent. We need a methodology that embraces uncertainty instead of disguising it with numbers. We need to approach projects more like we approach research and less like we approach acquisition.

</Methodology>

Traditional project management tools

Consider some project management hot training topics and how you might use them in an actual project.

Work breakdown structures

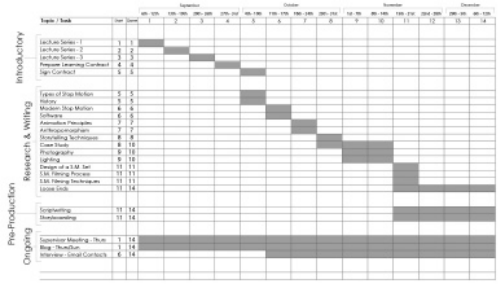


Work breakdown structures are good. I have no arguments there. The basic concept is to break a big unmanageable task into manageable sized chunks. A WBS is a simple upside down tree diagram. The base of the tree is the project and the leaves are the manageable size sub-tasks which will see the project completed. This is a good practice. Most of us do it intuitively anyway even if we don't call it a 'WBS.'

</Work breakdown structures>

Gantt charts

If you've studied project management anywhere, you've probably been taught to use Gantt charts and electronic



project management tools that draw Gantt charts. For the uninitiated, a Gantt chart is a calendar upon which each task is drawn as a bar. If you're a master builder building your one hundred and twelfth house Gantt charts are wonderful. You have a reasonable idea of how long each task will take and the tools can be used to optimise the utilisation of resources, i.e. schedule tasks efficiently. If, on the other hand, you are effecting a significant change for which there is no precedent, i.e. what I would call a 'project' then the challenge is not scheduling the task but estimating how long the task is going to take in the first place. I got the job as PM on the George project (see 'War Stories') because I had considerable experience dealing with their software vendor. I once worked for them and I used that to get the job. The vendor's implementation project managers had drawn up a template of an implementation, a thousand line Gantt chart which was presented to potential customers as evidence of administrative competence. The reality was a bit different. The product's appeal was that it interfaced with the client's machines directly, thus the question which always came up was, 'If we buy a new machine, how long will it take you to develop the interface for our new machine?' The vendor response was always, 'Three days.' Developing software to enable two machines to talk to one another depends on the machines; how complicated they are; whether the manuals are written in English etc. In this case 'new machine' often meant newly invented machine,

not just a recent acquisition. So while 'three days' was an honest answer in that it was probably an average based on interfaces developed to date, in reality it could take anywhere from three hours to three months. I know of one interface development which had the poor programmers attaching LEDs to the wires coming out of the machine in order to learn the machine's responses to certain inputs. That interface development took more than two years. Even if we ignore that example as a statistical outlier, how helpful is a calendar with a three day line on it when the likely variance is measured in months? How useful is 'three days, plus or minus three months'?

The three point estimate: Project Managers with more advanced training may now refer you to estimation formula. Most commonly, expected time = (optimistic time + 4 x most likely time + pessimistic time)/6. It is possible to derive a degree of precision exceeding the accuracy of the source data using complex matrix arithmetic and sufficient data; however, in this case we are talking about the ultimate conclusion to a conversation that started with, "I've got no idea...." and the answers that followed were given under duress after prolonged interrogation. You don't know how long it is going to take and taking a derived figure to your sponsors generates an unrealistic perception of confidence in a deadline against which your competence will be measured. This is like taking a high powered rifle and aiming at your foot. Instead, take all the extracted answers to your sponsors, and use them to manage your sponsors' expectations. Chain together the worst case scenario data and make your sponsors aware of the ugliest possibility. If your sponsors still decide to go ahead with the project you will

do so together, for better or for worse. They may decide not to go ahead, which to a consultant project manager means you have to look for another gravy train, but you will have saved them from potential embarrassment and astute executives will remember you for that.

Even as a vendor project manager I once forced the client to confront some ugly possibilities which resulted in a lot of stress (not for me :-)). The salesman had made it sound easy. I wanted the clients to know that it wasn't, before we started. They didn't want to hear it but they were all committed to the project and everyone from the CEO to grounds staff were on the sidelines waiting to pitch in if things went wrong. It was my first project with this particular vendor and I breathed a sigh of relief when it was over. I had stirred things up a bit, which is what I was employed to do, but I wasn't sure if it was appreciated, until one of the implementers walked into the staff room. She had a huge smile on her face as she dropped her bag on the table and declared to the world, "Well, that was the smoothest implementation we've ever done!" This particular vendor had excellent products and excellent staff. They didn't need me to teach them elementary statistics or how to draw Gantt charts. They needed to learn how to manage client expectations. It was a career highlight for me.

The visual nature of the Gantt chart also implies a degree of precision beyond what is real. If on the Gantt chart, you drew a line representing the current time and it intersected a task, that would suggest to me that the task should be happening about now. The more common interpretation of the Gantt chart is that the amount of the task to the left of 'now' represents the percentage of the task that has been completed. So the mere inclusion of a Gantt chart is setting

a very unrealistic expectation that the project will pan out exactly like this when in reality it's just your best guess. Day four into the machine interface development that was supposed to take three days, I would not be pressing the panic button unless, in accordance with the Gantt chart, I had re-allocated the resources based on the assumption that the task would take three days. No amount of planning is going to help if you simply don't know how long it will take. Consider this: instead of allocating days to work on specific machine interfaces, leave a month to develop all the interfaces. Then leave another month later in the project to complete the interfaces if necessary.

For the first couple of years in teaching project management, I warned the students against using Gantt charts at all in project documentation because they do not communicate possible variances and set unrealistic expectations. I taught them to document the timeline in a simple table reducing the project to three to five summary tasks or phases and to write against each one a brief verbal timeline with words chosen VERY carefully to reflect the level of confidence they had in the end date. I've since softened my position on Gantt charts mainly because project documentation can be boring and a coloured graphic helps break up the monotony of the document making it more readable, more likely to actually be read and understood and therefore a better communication device. However, keep it brief, i.e. three to five lines, and preface the graphic with an introductory paragraph setting the reader's expectations according to your confidence in the end date. Use words like 'current expectations, approximately, time frames' and if you can't think of another way of putting it, say it plain: 'This is a best case, no unforeseen obstacles or interruptions timeline' and then you incorporate

a sizable chunk of slack time as a contingency to accommodate variations.

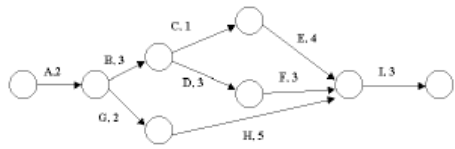
The real threat to estimation - human nature: Rather than teach PMs a mathematical formula to combine various estimates into a statistical prediction, it is better to prepare them for the much greater threat to their professional integrity - human nature. Consider two programmers, George and Mildred. They both have to develop a bit of software for you as part of the project you manage. You ask them for a task duration estimate. George says, "I can do that in a couple of days." Mildred says, "I need at least two weeks." What you don't know is that George, knowing that you're in a hurry and wanting to be cooperative, has given you a best case scenario, one in which there are no interruptions, no distractions, all other tasks take a back seat and there are no unforeseen complications. Mildred, on the other hand, has a lot on her plate and is sick of being hassled by managers like you. She knows she can do the task in an hour if you cleared her desk of all other work but that's not going to happen so she incorporates a generous portion of slack time. She's telling you when she thinks she can have it done for you, which is an honest and practical answer. Asking George and Mildred for worst, most likely, and best case scenarios will not necessarily give you a more accurate estimate but it will tell you a lot about George and Mildred, their work ethic, state of mind, things that might interfere with your project and how to ask them questions in future.

When you've spoken to all your project Georges and Mildreds, you take the numbers and draw up a pretty Gantt chart which you will present to management along with your prediction as to when the project will be finished.

Along with your career. You may as well use a random number generator. Rather than memorising mathematical formulae which you can look up as you need them, better to learn and practise your communication skills. Learn how to conduct an interview, how to construct and ask questions so that you can use George's optimism and Mildred's realism to the project's advantage rather than to your career's detriment. I'm not an authority on this subject but I know enough to wet your appetite. There's some information about asking questions under 'Handy skills – interrogation.'

</Gantt charts>

PERT charts



PERT charts are another favourite. For the uninitiated, a PERT chart is a network diagram, a bit like a flow chart, showing task dependencies and durations, from which one can calculate a project completion date and deduce which tasks are on the 'critical path.' The mechanics of drawing a PERT chart are not particularly challenging. I teach my students how to draw PERT charts for two reasons. Firstly, as with Gantt charts, the industry expects that project managers know how to do them and their competence as a potential project manager may well be judged harshly if they do not know how to do PERT and Gantt charts. They can't be good project managers if they don't get the job in the first place. The second reason for teaching students to do PERT charts of projects is mental gymnastics. It's like sending management students to study mathematics. It helps to exercise the logic and lateral thinking necessary to maintain a task schedule. Having

inflicted a few hours of drawing PERT chart activities on my students I encourage them to ask me how many PERT charts I've drawn in my professional career. My answer is, "Outside the classroom, none."

I can see two potential problems with PERT charts. Firstly, the usefulness of the conclusion is dependent on the accuracy of the time estimates for each task. If your project is like a Lego assembly of well-known, 'done it before' tasks and you have accurate practical duration estimates then it could be useful. However, referring back to the definition of a project, this is rarely the case. Secondly, the examples I use in the classroom are small and carefully constructed to produce a neat diagram which fits on a page. Attempting to draw PERT/CPM diagram of any significant project that I've worked on would lead to a spaghetti diagram resembling a Pro Hart reject the size of the boardroom floor. Add to that the mathematical truism of combining inaccuracies and the result is a very high degree of variance in the final estimation, which makes the development of the PERT/CPM diagram an incredibly convoluted demonstration of the simple fact that you don't know how long it will take. PERT charts can be useful, if you have a VERY small project that is EXTREMELY time critical for which you know EXACTLY how long each task will take. In those circumstances, a PERT/CPM diagram may help to schedule and manage the tasks in the project. Otherwise your time would be better spent listening to your work force and managing the expectations of your sponsors.

</PERT charts>

</Project management traditional tools>

</The problem with how it's taught>

Past mistakes – why fail?

The reason why projects fail does not seem to be such a great mystery. It appears to be well documented, if not well understood. I must confess that the statistics I use in my training are over ten years old but I always challenge my students to reflect upon their project experiences and tell me if anything has changed.

Some Project Success Statistics:

- There is a proven direct correlation between project size and project failure. Over 90% of projects in the US worth over $6 million have failed.
- 30% of US based projects never reached a fruitful conclusion.
- $US 75 billion is wasted annually on projects that fail.
- 51% of projects in the US exceed their budget by 189%.
- Most US based projects deliver only 74% of functionality.

Some reasons given as to why project failure rates are so high:

- Goals, needs, scope not clarified or agreed at the commencement.
- Access to skills inadequate or untimely.
- Team not committed to project.

- Scope creep.
- Project context or priority changes.
- Loss of momentum.

source: 1999 Gartner Institute PM Core Capabilities

To say that project failure rates are 'significant' is possibly the greatest understatement since Noah mumbled, "It looks like rain." Let's transpose an apparently typical project scenario into a familiar environment:

Son:	Hi dad. Would you help me buy a car?
Father:	Sure, son. How much?
Son:	It's a seven thousand dollar car so you'd better make it twenty thousand.

How do you think that conversation would end? It borders on comedy but somehow when it comes to spending millions of shareholder or tax payer dollars, it seems to be 'OK'. In reality it's not comedy it's offensive. The money wasted on failed projects could probably pay off the Australian national debt in a couple of years. Say goodbye to the welfare woes, the healthcare crisis and bumpy roads. We could afford them all with the money wasted on failed projects so it's probably a good idea to reflect upon some of the reasons for the catastrophic failure rates.

My question to you now is: Looking at the reasons given for project failures, which of the given reasons do NOT constitute bad project management? Almost invariably my students would propose that 'unanticipated project context or priority change' is not a management failure. To which I respond, 'Perhaps.' Following the 2011 tsunami in Japan, I'm pretty sure that local authorities there were suddenly much less concerned about the building of new tennis courts, and you wouldn't blame the tennis club's project manager for

that; however, a strategic decision to stop is not a failure. The failure occurs when projects are unable to cope with context or environmental changes and do not stop. There's also an element of risk management in context/priority changes. If you start a project on the assumption that the project's context/priority is set in glass then you're part of the problem. So maybe project context or priority changes can be excluded from the 'bad project management' list but looking at the rest, it seems a fairly safe summation that projects fail primarily because we don't know how to manage them.

Now take a peek at the first statistic. '...Over 90% of projects in the US worth over $6 Million have failed...' It tells a story of its own, and a very interesting one. I would have thought that bigger projects, presided over by professionals, monitored by auditors and answering to the highest level of management would have a much higher chance of success than smaller projects, which don't attract a lot of administrative attention and are often driven by much less qualified and much less expensive managers. Yet the contrary seems to be true. The bigger the project the higher the failure rate. So why the apparent anomaly? The obvious answer is that bigger projects have more complex outcomes and more stakeholders to please etc. but that is precisely why the bigger projects are subject to such management scrutiny. I have an alternative theory.

If you're spending a billion dollars, then managers, vendors, staff and other service providers expect to sign pieces of paper. Nothing begins until the outcomes are clearly defined, agreed, documented and signed off by the relevant contributors, be they decision makers or service providers and therein lies the problem. The formality is, in fact, an overlay of the traditional management methodology onto

the project. Outcomes are bound by contracts to deadlines, the bureaucratic nirvana model of reality. Unfortunately, the most sophisticated mathematical model is still a simplification of reality. Reality is just that little bit more complicated. Physicists thought Newton had the laws of physics figured out until Einstein came along and then came string theory. Now it seems that the parallel universes thing is real!

Assuming that you learn from your mistakes and you're managing the five hundred and twelfth iteration of a process, then your model of reality would be quite refined and a very useful benchmark against which one can make predictions and measure performance. Your perception of how things might work on the first iteration of any process is going to be much more uncertain and so it is with projects, every time. Traditional management is all about minimising the variables. The problem with projects is that almost everything is either variable or unknown.

In contrast to the big project, consider a little project. A small business office is getting a makeover - a new filing system and a kitchen renovation. Budget: fifteen thousand dollars. The office manager is tasked with the job of overseeing the implementation. They don't even call it a 'project' and Georgette doesn't even call herself the 'project manager' until a year later when she reflects upon her experience in a job interview. In the meantime, Georgette knows what has to happen and goes about seeing that it's all done. She also knows that Mrs Marsh, who has been responsible for the data entry team for twenty-seven years, is not going to deal with the change well. She's scared of computers. Mrs Marsh is a pain to deal with but she is very efficient and valuable to the company so it would be bad if she resigned. So while the trades people are remodelling the office, Georgette spends

time with Mrs Marsh painting a picture of how the new system is going to work and what an important role Mrs Marsh has to play in both the implementation and the running of the office afterwards. Georgette has an intimate understanding of the office environment. She commands respect from the office staff and support from the bosses. That's why she was given the task. When things don't go according to plan no one notices except Georgette, because there is no 'plan' as such. Ask Georgette how it's going and you'll get an ear full but the bottom line is that it's happening so everything is OK.

In the billion dollar project, human intuition is safely locked away. Intuition is hard to capture in a contract. You can't manage a billion dollar project with handshakes and chats over coffee, which is a pity because so much more information is exchanged in a handshake than just 'yes.' In management school they tell you that when two people converse, a surprisingly small percentage of the actual communication is contained in the words. The rest is tied up in body language, context, attitude etc. There are elements of confidence, trust and empathy in a handshake agreement. Sometimes a handshake can leave you feeling a certain lack of trust. Although the plumber had assured Georgette that, "We'll fit the new urn tomorrow," she quietly arranges the loan of a jug from the downstairs accounts department because she's dealt with these people before. They are well-meaning but a little optimistic sometimes.

My theory is that the direct correlation between project failure rates and project size is because our fundamental approach to project management is flawed and the bigger the project the harder it is to circumvent 'due process' as represented by the officially recognised company project

management methodology. If you're tempted to skip to the end in a search for the magic solution, there isn't one. If it was that simple everyone would be doing it already. However, hopefully I will stimulate some thought that will nudge you in the right direction.

</Past mistakes – why fail>

The battlefield

I started teaching project management to people who were already managers of sorts. It began with a guest appearance on a training course that a client organisation was delivering internally. My project had enjoyed a very high profile within the organisation and the project management teacher wanted her group to hear from a 'real' project manager. Between us we ended up rewriting the course and when she left, I continued to deliver the course for several years. The target audience was junior and middle managers who were sent there generally because they had a project to supervise in their area. I decided very early on that these people had all the managerial skills they'd need to manage their projects already. My job was to get them ready for the project environment. Like briefing soldiers before combat, my job wasn't to teach them how to shoot, but to appraise them of the nature of their enemy and the terrain in which they would do battle. That's what this section is about. Understanding the battlefield - the world of projects.

Defining words – project vs process

The terminology I use to talk about project management comes from general usage, in particular my general usage

and not any text book in particular, so it's probably a good idea to establish a glossary so that if we disagree, at least we'll know what we're disagreeing about.

Firstly '**projects**.' When I talk about a project I'm talking about an endeavour that has not been undertaken before; has a beginning and an end; is not in anyone's job description; and changes the status quo. If at the end of the project nothing's different then you have either failed or you've not been working on a project.

The opposite to a project is a '**process**' - a task which is repeated. Rather than a beginning and an end, a process has iterations, like doing this year's budget. In the workplace, a process generally belongs to someone and when a process is complete, the environment at large is unchanged.

So mowing the lawn = process. Paving the lawn area = project. It sounds very cut and dried but let me pose the question: 'Building a house' - project or process? I'm currently building a house as an owner builder. For me it's a project. I've not built a house before unless you count the cubby-house that I didn't finish as a child. To Barry the builder building his two hundred and seventeenth house, it's a process. There will be some new parameters and new clients but Barry has done it all before. Barry doesn't have to figure out where to buy bricks. Barry knows that there are a million and seven varieties of tiles and that there's no such thing as a 'heat proof tile' for the wood heater's hearth. Barry doesn't need to spend seven hours on the Internet researching tiles because a well-meaning but ill-informed friend has told him he needs special heat proof tiles for the wood heater hearth! We digress. Barry will call each new house 'a project' but when each house is completed, the only thing different in Barry's world is an extra photo in his portfolio album and a significant improvement in

his bank balance. The management methodology that Barry uses to keep his business efficient is very traditional. Decisions are based on precedent. The lessons learned from past houses can be applied directly to the houses he will build in the future. So from a management perspective, building a house could be a project or a process.

</defining words – Project Vs Process>

Implications to management methodology

When you begin your career as a project manager, the dictionary definition of 'project' vs 'process' is not going to come up in conversation often. The reason it's important to us is that there are serious implications to how you would manage one or the other.

'Normal' management is...

Recapping: In 'normal' management, the expectation as to how and how well you perform your tasks can be based on history. How was it done yesterday? Those of us post puberty in the 70s may remember the British sitcom 'The Liverbirds.' Beryl's job was to put the sticky tape around the top of biscuit barrels. From experience, the biscuit factory's management would have learned the optimal width of the sticky tape and how much had to overlap the tin lid. They would also have learned and recorded the reasonable number of biscuit barrels that a sober capable employee could tape in a day. Thus on day one, Beryl could be given clear instructions as to what to do and on day two, Beryl's performance could be measured according to clear and unambiguous performance metrics. Beryl's job was not very exciting.

</'Normal' management is...>

'Project' management is...

As a consultant I have no fixed place that I go to, to work. The day before the job, I'll use an Internet map search engine like Google maps to plan the route. If Google maps estimates the journey to be forty-five minutes, I leave an hour and a half at least. Why? It's not that I don't trust Google maps but there are too many unknowns. I've never ridden that route before. I am not familiar with the traffic congestion points, alternative routes, which lane to be in and when, and I'm not familiar with parking options at the destination, or where to get a coffee before I start. If your job is project-oriented then there's a good chance that there are no preconceived performance metrics and no historically ratified method of doing the job. This brings to light two enormous challenges: How do you instruct your workforce? And secondly: How do you measure their performance? The waters have been muddied and the usual tools of management are very much out of focus. The significance of this goes beyond getting the job done. Put yourself in the shoes of the finance director who's hired a project manager to help replace the patient management system in a hospital. This is potentially a million dollar project and the success or failure of the project will not only affect the profitability of the hospital directly but it will reflect upon the finance director's reputation. Our very nervous finance director's career hinges on the performance of a team for which the usual elements of control don't exist. And it gets worse.

Our definition of a project includes a change in the status-quo which means that you are changing the workplace which in turn means that you're going to be inflicting stress upon some part of the workforce - the part that you need to work with. So on top of the list of project challenges is that you're probably fighting your own workforce all the way. And it still gets worse.

When you first assemble a team, the authority, social and productivity hierarchies will take some time to stabilize. In an established workplace you're not likely to offend a surgeon by calling him 'Doctor' instead of 'Mister.' You're not likely to leave a VIP out of the loop only to later learn that 'they're not into email.' Basically you wouldn't go into battle with a squad that had never trained together before. But you are expected to start a financially and chronologically constrained project with a fresh and unfamiliar team.

So in short, you're about to start a job in a hostile environment with an uncontrollable workforce and a nervous boss, and that's on a good day. Under the heading of 'why would you?' we covered the possibility of being engaged specifically to be the scapegoat. Your mission, should you accept it, is to rescue the reputation of a high-flying executive who made some bad decisions. Of course, the position advertisement is usually worded somewhat differently.

So much project management methodology is about the mechanics of management. Putting some policies on the shelf to create the illusion that things are 'normal' is like putting a flower in the barrel of an AK47 assault rifle and calling it a vase. Traditional project management methodologies try to turn a project into a process because we all know how to manage a process. Until we get over this, projects will continue to be the pirates on the high seas of business.

<'Project' management is...>
</Implications to management methodology>

Combatants

Again in the name of clarity it is worth taking a look at the players on the stage. The names are less important than the

roles. In fact, don't get too hung up on the names because names are being reinvented, it would seem, every year or so.

These are the roles I'll be talking about in this publication. What you call them is less important. Their responsibilities to your project are very important.

Sponsors: The sponsor or sponsor group is the ultimate owner of the project. They are the ones who will benefit or suffer the most according to the outcome. The sponsor is the one who agrees to the terms of the project including the budget and the sponsor is the only one who can authorise a variation to those terms. Be careful. Those nominated by the administration to act as your sponsors are not always those with the greatest vested interest. Do a mental cross check. Ask yourself, who's paying the bills and who's going to shoot me if it all goes wrong? Those that come to mind are your real sponsors. (See George Project for an example of getting it wrong).

Stakeholders: Stakeholders are those with a vested interest in the project. For example, if we're talking about a computer project then in my mind that includes the implementation team and the technical support groups as well as the users of the system. Sponsors are also stakeholders, as are the vendors. Knowing the stakeholder groups is important because those with a vested interest need to be kept informed. The void of the ill-informed is the target of the rumour mill and paranoid imagination. What's more, you are the mercenary. Stakeholders need constant reassurance that you are still executing their will and not working to someone else's agenda. Given that the standard management tools are out of reach, if they feel out of control then they will 'manage' you the only way they know how, which is to criticise. You need to know who your stakeholders are and you need to keep them engaged and informed.

Champions: Champions are generally stakeholders from the group whose workplace is to be altered by the project. Clinging to life rafts in the sea of discontent, fear and anxiety, are a few stakeholders who begin to see that this project could actually be of benefit to the workplace and specifically themselves. These are your champions. To understand the value of the champions you have to put on your salesman hat and dig up your 'marketing 101' notes, or simply consider the degree of influence a used car salesman has upon your decision to buy a car, compared to the voice of a trusted mechanically inclined friend. If it comes from their peers, it is going to be much more persuasive than anything they hear from you. After all, you are just a management tool. Cherish your champions as they are by far outnumbered by antagonists. Use them to disseminate information and perhaps even to train their peers.

Steering Committee: Generally, you call the sponsor group that you consult for authorisation on budgets, project variations etc. your 'steering committee.' If it's a big group, try to scale it down. It's a lot harder to get the attention, let alone consensus, from ten executives than it is from two or three. Ask them if they can nominate a cut-down group for the purposes of streamlining the administration process. It's not as outrageous as it sounds. In most cases, the executive types love to talk about new concepts and ideas but are happy to step back when it comes time to committing time and actual effort towards a project. Choose your words carefully though. Even though they may not even want to be involved beyond taking credit for the idea, you don't want to make them feel pushed aside. An approach that has worked for me is to recommend the establishment of a second high level committee, which you want to call the 'Advisory Committee' or 'Governance Committee.'

Advisory Committee/Governance Committee: The Robin Vysma definition of governance is hands-off management. The Governor General does not take an active role in the creation or execution of policy. Rather, the governance role is that of ensuring that policies and activities carried out in the organisation's name comply with the organisation's stated mission and values, and with external rules, regulations and standards. They are the big picture people without an actual role to play. In the practical sense, with respect to your project, this is an influential group of people watching your project. This is a good thing. They often don't even meet, but they are on the mailing list for the weekly report and are copied on all reports and communications to the steering committee. If anyone has any concerns about the project activities they will raise it with their colleague in the steering committee, who will consult you if necessary. In effect, you are using the steering committee to filter out potential interference from other powerful people within the organisation. At the same time, most of these influential people had some involvement with the inception of your project and may be able to identify potential pitfalls before you can. So having a governance committee is generally a win-win scenario.

Management Committee: Rumour has it that the art of leadership is delegation so if you have a number of groups or teams working on your project, nominate a team leader for each group and meet with them regularly, preferably weekly. Call this forum the 'management committee.'

Project Manager: Having discussed the project management structure with my students I have, on occasion, posed the question, "In which group do you as the project manager belong?" The reason I ask the question is because as PM you attend all forums. You may well chair and/or minute the steering

committee as well as the management committee forums, but are you a member of the steering committee? The answer is 'no.' Members of the steering committee endorse the project's budget, timeline and deliverables. Your job is to record their decisions. However, when your sponsor says, "Don't be silly, Robin. You are on the steering committee.", then you are on the steering committee. HOWEVER, remember your role and stay out of the decision-making process. Even recommending is dangerous. If pressed for a recommendation or opinion, refer back to those who do matter, "The technical support group recommend.... and I would be inclined to take their advice." It's not a fob-off. Remember that you are an administration mercenary and at the end of the project you will be gone. It is the motivation, competency and resources of the workers and not the project manager, that will determine what's deliverable. It's nice to be asked, but with your project management hat on, your opinion doesn't count.

I keep coming back to your mission as project manager. As long as you understand why you are there the mechanics and even the rules can be flexible.

</Combatants>

Rumour has it...

Twice in my professional career I've had to prize angry fingers off my throat. Most recently I was having lunch with the IT manager of a hospital which was the target of some significant project work. It was a relatively new hospital. It was like having lunch with Michael J Fox. He shook as he talked. The poor fellow was a wreck. The tail end of the conversation went along the lines of, "And now I've heard that they are going to outsource...." Desperate to put Larry at ease I said, "Don't be

silly, Larry. I started that rumour." In truth, I may have helped it along a bit but I didn't actually start it, but I didn't quite get that far in the explanation before, in front of maybe a hundred people in the crowded hospital cafeteria, Larry dived across the table. After I extricated my throat from his rather large hands, I tried to explain myself. I wish I could say that the conversation went smoothly but on the day, articulate eloquence took a back seat to the need to breathe. I've had a bit of time to think about rumours since then.

Do you think that the last political 'leak' to come out of our national capital was the result of the careless indifference of a public servant? I think not. Rumours are powerful weapons that work in two ways:

(1) Rumours rob the owner of the information the opportunity to present the information at a time and in a light that favours their own agenda.
(2) Rumours can act as an antivenene, generating a wave of resistance to an idea before it has even been announced.

You wouldn't knowingly ask your boss for a raise the day staffing cutbacks are being announced. You wouldn't put that proposal forward at a staff meeting of your peers who are not expecting to get a raise. Now put yourself in the shoes of a jealous colleague who wants to harpoon your request for a raise. Who would be told first? Your peers. When would the boss find out about it? The day he has to announce staffing cutbacks. By the time you get to throw your pitch, your good worth is weighed against all of the company woes. It's hardly fair but you've just been blind-sided by the rumour mill.

I'm not suggesting that rumours are a project management tool. In fact, quite the opposite. Project management is

a morally clean vocation. In the volatile and uncertain world of projects, the web of deceit is proportionally complex and uncertain. The only safe path is the truth. Just be aware that not everyone is using the same play book.

</Rumour has it...>

Great expectations

Software developers have a saying: 'Document the bugs and call them features.' A subtle variation worthy of note to the astute project manager is that 'it is easier to manage expectations than to modify the system.' The first classic mistake many project managers make is to project an air of confidence in the project and the outcome. And why wouldn't you? You are there to help them and if there are no problems then you are doing your job well – except you are not.

You are sailing through uncharted waters. To tell your paying passengers that the journey is a done deal is dishonest and irresponsible. You may have a high level of confidence in the outcome but it is not a given. There WILL be bumps in the road and some might even be serious enough that you need to re-engage the sponsors and perhaps change course. They need to be aware of this from the start. When that happens, and it will, how do you think your sponsors will react if all they've ever heard from you is, "Everything's going swell"? They need to be quietly confident, a little bit worried and ready to step in to help you if it's needed. Furthermore, your job as PM is to keep decision makers accountable for their decisions. If the sponsors do not understand the potential pitfalls then they cannot make an informed decision and since you are the conduit for project communication the failing is yours.

Think ahead to the 'things have gone wrong' conversation that you will inevitably have with your sponsor. Are they pleased to hear from you despite the news being bad? If not, then you have not been managing their expectations appropriately. If you come armed with information and options, you are doing them and yourself a number of favours. You are reminding them that not only do they own the project but they still ultimately control it. You are demonstrating that they will hear the bad news from you first which in turn fosters trust. When your sponsor's bosses and peers hear of the problem they will be on the phone, not to you but to your sponsor. If your sponsors are informed and aware of the options they will be able to answer that call with confidence. They will be perceived as being in control, dealing with the problem. So even though the news is bad, you've made them feel needed and look good.

The converse scenario is rather unpleasant. Your boss (and sponsor) gets a call from a colleague or her boss. There's a problem with your project and she has absolutely no idea. Think ahead to the tone and recipient of her next call. Be afraid.

Project management is all about truth. Sometimes it's brutal and sometimes it's hidden because no one in the organisation has been game to say it. Like it or not, you have to bring it out into the open and strangely enough, most of the time it is appreciated.

</Great expectations>

Change stress

'A change is like a holiday' may apply to lounge room furniture but change is not necessarily so welcome in the workplace. Taking people out of their comfort zone may be

a healthy personal development exercise but in the workplace, comfort is being in control and any changes to the way things are done threatens that control. On top of that, workplace changes can demote experts to newbies. Not only does this damage their standing within the organisation but they may even take a salary hit if pay is linked to productivity. So they're being criticised for not performing because they're learning something that you've inflicted upon them and they're going to love you for it – not really! Even when the project is introducing some potentially positive changes, if it came from the corporate office, then even agreeing with it can be construed as disloyalty to the local managers. The saddest scenario I've witnessed is people resigning after thirty years with the company because in their own minds they saw the introduction of computerised systems as marking the end of their usefulness in the workplace. While nothing could have been further from the truth their mindset was born at home watching grandchildren playing computer games.

Given that the change is ultimately driven by corporate profits and not the well-being of the staff, some of whom will probably lose their jobs, they are most likely to be of a disposition best described as disagreeable if not openly hostile. It is not rare for their hostility to be directed at the project manager who is perceived to be a mercenary engaged by the company to do management's dirty work.

By now you may have gathered that 'Organisational Change Management' is going to feature under the heading of 'Skills a project manager should have' and you'd be right but there's another scenario designed to make a project manager's day. Of the two sides of the story, one is articulated by MBAs (Masters of Business Administration graduates) proficient in

negotiation skills who earned their positions with political acumen, and against that, it is easy to dismiss the whinging of workers who have to learn something new. But what if there is some substance to all the kicking and screaming coming from the rank and file? They may well lack articulate flare but they are on the front line and are best positioned to judge project implications to their workplaces. Sadly, this scenario is not rare. The people who are nice to you and pay you generously because you're going to get their project done for them, have got it wrong. The people who are nasty to you have some very good reasons to complain and when that realisation sets like concrete around your ankles you know you're going to have a fun project.

</Change stress>

Teamwork

Teamwork features under 'Handy skills' as well. The reason for having it here is to explain the significance of teamwork to project management. The abridged version is that another contributing factor to the inaccuracies of your project estimates is that the group that has been assembled to work on the project is not going to perform to its full potential, not immediately anyway. In plain words, if your estimates are based on theoretical capabilities then the reality is going to hurt.

It takes a while for the pecking orders to establish; for the communication protocol to stabilise. I've spent a ridiculous amount of time fending off criticism unrelated to any project I was working on because I began emails with 'John, could you look into..... Thanks, Robin.' Way back then email was new. They were used to letters and memos and because

I didn't begin with 'Dear' John... it offended many. It was considered abrupt or even condescending, inappropriate to my station. I, on the other hand, considered email as a conversational medium. I hugely admired my boss and he wasn't an unattractive man but I can't imagine ever addressing him as 'Dear' and found it difficult to do so in an email. We all got over it, of course. My point is that this is the sort of thing that is time-consuming and not the sort of thing you get with an established team in an established workplace. The productivity of any team is a function of the working relationships between members. Managing relationships within the team is going to take a lot more of your time than you think. In fact, it's pretty much all you do. Remember your mission? You're really a relationship manager. Not just between workers and management but also helping those working together for the first time to build working relationships. Those with accounting or business experience will understand the full cost of staff turnover. It's not just the ad in the paper and the interviews or even the exorbitant fees you have to pay agencies to short list applicants but the productivity hit that any team takes in order to integrate a single newbie is significant. With a project they're all new.

</Teamwork>

</The battlefield>

How it could be taught

My encounters with the popular project management methodologies including Prince 2, PMBoK and Spectrum, were less than helpful and only inspired me to avoid them even more. The first few project management training courses I attended were very focused on how things should be. They painted a picture of the ideal project. The idea was that when you get back to your office you stir the quagmire in the hope that it will produce a soufflé. It seldom does. In the mid-nineties I spent several days training with a fellow called Rob Thomsett. He described a chaotic world full of personalities and politics. My honest initial and slightly paranoid reaction was, "He knows! He's been to my office!" I was sure that that was why I'd been sent there. Not only did I learn stuff that I could actually apply to my situation, but until then I had been convinced that the study of project management was akin to the application of bureaucracy to astrology - pointless. Rob inspired me to keep looking at project management but through different eyes.

Chaos mathematicians gave the world a formal and irrefutable version of 'we're missing something.' It sounds silly at first and chaos mathematicians were treated as silly in the beginning but the Internet we take for granted today may

well owe its existence to chaos mathematicians. When they first connected two computers together with wires, the listening computer didn't get all the messages. Increasing the power going down the wires reduced, but could not eliminate, the errors. Chaos mathematicians deduced from the seemingly random pattern of errors that the solution was not just elusive but, with our current understanding of the universe, did not exist. Engineers changed their approach and now when your computer is talking to the printer, or other computers on the Internet, there's a bit of "What? Say again?" going on in the background.

And that exhausts my understanding of chaos mathematics. However, I submit for your consideration a project equivalence: that the catastrophic failure rate of projects suggests that there is something fundamentally wrong with our current approach to project management, way beyond some discipline in the application of methodology. Basically we're looking at it all wrong.

In this chapter, 'How it should be taught' we will look at the basics and a radically different model for projects that has been highly successful in some sectors. I propose a project manager's 'mission.' I feel it safe to assume that to do your job well you first have to understand why you're there. Although I don't believe you need to be any particular personality type, it is worth looking into how different aspects of your personality can make you powerful or vulnerable as a project manager. We'll look into how to make use of a Jung-Myers-Briggs personality profile. I'll list some skills and tools that I think might help you on the job. I will introduce the documents that I consider essential to project management. If you've been in my classes you'd be forgiven for thinking I love documentation. In reality,

I'm no different to most, i.e. I've always hated documentation with a vengeance, until I saw it work. George Orwell was right. "He who controls the past controls the future." Your career will routinely hang on who said what. As a project manager you are often the outsider and in the heat of battle, who are the local generals going to trust, their own or the mercenary?

So now for 'how to manage a project.'

It's just a phase

Most methodologies like to break projects into stages. The PMBoK methodology documentation talks about five basic 'process groups.' Prince 2 calls them 'processes' and there are apparently seven. From memory, Spectrum called them 'phases' and there were even more of them. It's about grouping activities so you can talk about them. It doesn't matter what you call them. I tend to talk about 'phases.'

The seven Prince 2 project 'processes' (aka 'phases') are:

1. Starting a project
2. Initiating a project
3. Directing a project
4. Controlling a stage
5. Managing stage boundaries
6. Managing product delivery
7. Closing a project

Similarly PMBoK methodology breaks a project into five 'process groups':

1. Initiating
2. Planning
3. Executing

4. Monitoring and Controlling
5. Closing

PMBoK's second angle on project management is 'knowledge areas' and it lists nine. I like this approach. In fact, I'd like to add to the list (see 'Handy skills') but for now let's look at the project phases. Apparently not all phases will apply to all projects. These methodologies are to be considered a 'toolkit' for project managers, meaning that you select the components that are relevant to you. Other methodologies include 'conceptualisation,' 'feasibility,' 'authorisation' and 'launch' phases. These are not incorrect or irrelevant but having a comprehensive list of scenarios which may or may not be relevant to my project has not been particularly helpful. It's like opening a manual on eye surgery when you are trying to extricate an ingrown hair.

The mechanics of project management are basically clerical and the anatomical breakdown of a project into possible, but not always relevant scenarios, is of limited value. I look at it this way:

Regardless of scale or complexity, projects go through three phases:

1. planning or start-up
2. execution
3. closing

Until you've got the 'go-ahead', you're planning or 'starting.' Once you've got the go-ahead, you're executing, and when you've delivered the payload you're closing or finishing up a project. This is not a dumbed-down version of project management but more of a helicopter view, one that is always going to be relevant.

</It's just a phase>

Project start-up

I tend to talk about start-up or planning 'phases' and the use of the plural of 'phase' is not an accident. Projects begin when someone in the staffroom says, "At ACME they do it this way ..." to which the boss replies, "How much would that cost?" and so begins an iterative cycle of ideas, endorsement and details. The idea has been expressed. The question from the boss "How much would that cost?" is in a way, authorisation to spend a bit of work time gathering information. The cycle continues at next week's staff meeting. "I looked into ACME's...." As the cycle gains momentum the iterations become more and more formal and eventually something actually gets written down. At first it may be just a minuted discussion at the staff meeting. At some point in time the boss will need to see a business case and the idea finally becomes recognised as a potential project. In some cases a feasibility study might be asked for to answer the question 'is it even possible?' In any case, the cycle continues until you are given the money to spend.

So you've got the job and you're sitting at your desk. You've turned on the computer and adjusted the clock. You've flipped the calendar to the correct month and arranged the pens in your top draw into a useful order. Now what? Perhaps the project is under way already. Unfortunately, project managers are often engaged well into the project, after the boss finally realizes that the current staff actually have real jobs already. In that case you need to do some catching up. Either way, there are two documents that need to exist before you get stuck into the project: a proposal and some kind of plan of execution. Look for them. Ask for them by description rather than name because they could have many names. If you can't

find them, you need to create them and have them endorsed by your sponsor. What these documents establish is:

(1) That what is proposed is appropriately aligned with what the organisation is all about, i.e. its mission, and current business strategies, so that organisational commitment to the project's objectives is irrefutable and its priority can be managed in the context of the organisation at large.
(2) That there are agreed outcomes and the money, timeframes and resources needed to deliver them.

The first is the 'proposal' or 'business case.' The second could be called a 'project plan,' 'charter' 'project brief' or 'project statement of work.' Some methodologies differentiate between these but I tend to use them interchangeably, whatever the client is most familiar with. I've settled on 'charter' as a default. The most sensible name is 'project plan' but I found that people think the Gantt chart is the plan and there is so much more to the plan than that. In each case the form and formality of the document will depend on the scale and profile of your project and the culture of your organisation. What is not negotiable is its purpose and that it exists and is endorsed by the project sponsors. Endorsement of the charter marks the end of phase one and the beginning of project execution.

There are some notes on proposals and project charters under 'Special Docs.'

</Project startup>

Project execution

As with start-up, the manifestation of project execution activities as well as output can vary dramatically depending

on the profile and size of the project and the cultural environment in which you work. However, the elements will all be there. Take for example the 'launch.'

Launch

The project 'launch' might be an email broadcast to all stakeholders announcing the go-ahead or it could be a nationwide road show complete with champagne morning teas, slide show presentations and a guest appearance by your CEO. So while the launch may or may not be a significant company calendar event, it is always significant to your project. Everyone who's heard about the project and contributed to its inception needs to know that talking and planning are over. It's happening now. The launch sets the tone for future communications and sets in motion the plans that have been devised to date.

</Launch>

Tracking

A lot of what you do once you've got the go-ahead is tracking, comparing spending against the budget, progress against the timeline and output. Does it still look like you'll be able to deliver the project payload as promised? Do you still expect to finish on time? How much extra is it going to cost? These are questions that will take up permanent residence at the tip of each sponsor's tongue and you have to have an informed answer close at hand at all times. Also, the very moment it looks like you might go over time, over budget or the payload may be compromised, you need to start some contingency planning and rehearsing the 'we've got a problem' talk that you'll soon be having with your sponsors.

</Tracking>

Reporting

I have yet to meet a sane person who likes to write reports; however, like brushing your teeth, you make it a habit when you appreciate the benefits.

Reports have all sorts of titles like 'status reports' and 'periodic reports' etc. but to avoid confusion, I'll talk about the 'big report' and the 'short report.' The big report is the formal one, addressing key aspects of the charter and treated with the same degree of formatting and ceremony as the charter. It should include planned-versus-actual information about budget, timeline and deliverables. It is a formal report used in boardrooms by your sponsors and to pad the filing cabinets of auditors.

The short report, on the other hand, is a primary weapon for the project manager which if done well can be the difference between a happy project and a nightmare.

When you're implementing a change in someone's workplace they're understandably nervous. It has taken years to establish the office pecking order but when the work-place changes there's always a reshuffle. The rumour mill will fill any information void. Bosses, your sponsors included, are nervous because in many ways the performance of their departments, and therefore their reputations, lies in your hands. Their stress is compounded because they don't know how to manage you. If they are nervous and are not constantly appraised of the situation, they'll come looking for you demanding all sorts of reports. And as mentioned before if they are nervous and don't feel in control, they will manage you the only way they know how, which is to criticise.

Enter the short report, a weekly snippet of information distributed to every stakeholder at a regular time. Unlike the big report,

this is not a formality. This is one you want people to read and understand. The subliminal messages you are sending are:

- progress, see!
- if there are any problems, you'll hear it from me first, I promise
- if you can think of any obstacles please tell me
- if you have any questions you can ask me
- it's still your project; you are still in control, through me
- it's challenging and we're encountering obstacles every day but we are still on track.

It's a lot to say and you have to say it in as few words as possible. Remember this is one you WANT people, even those who haven't asked for it, to read. It has to be brief enough that even a glimpse through the preview panel between the reader scrolling to it and pressing delete should impart some information. The body of your email might look something like this:

- This Week
  - a couple of bullet points as evidence of progress/activity
  - an 'Expected to achieve but didn't' subheading
    - if they're reading this they've probably read last week's!
    - remember to include 'but expect to catch up...' i.e. an indication as to whether it's a problem or just a reschedule
- Next Week
  - reminder to those doing
  - anticipation is part of engaging

- Current Issues & Challenges
  - Don't leave this blank. Use this as a reminder that this is a project, and that the outcome is not a given. You are dealing with obstacles daily. Tell them!
- Are we on track?
  - A one liner at most. One word if you can get away with it e.g. 'just' If the answer is 'no', include a very short explanation.

Remember to have a quick discussion with your sponsor before you press 'send' about any current issues and challenges and the reasons, should the 'are we on track' not amount to 'yes.' There's a good chance that senior stakeholders reading this will not come to you with their concerns but call your sponsor directly. If your sponsor has been briefed they will be able to respond as though they are fully in charge of a difficult situation, which is appropriate.

To maximise the probability of your report being read:

- plain text email only, maybe some bold & indenting. I'd even avoid html because not all email clients/readers display it correctly by default.
- no attachments & no 'click here.'
- use bullet points and white space to make it scannable.
- do not mention a task or issue twice, i.e. if it's under 'expected to achieve but didn't, don't list it again under 'next week.' List the task in one or the other. This is not a comprehensive list, just a show of progress.

Keep 'em coming. Don't ever miss a report. If you're stuck in hospital after a car accident, call your sponsor and talk them through how to broadcast a short message on your behalf. Keep it regular, same time every week, ***NOT*** Friday

afternoon because if it generates concerns, the concernee's minor concern will brew into hate-filled rage by Monday morning and if you have ruined their weekend they will be sure to ruin your next month!

I've been accused of generating spam, affectionately I think. I've also received some interesting responses to my final short report, thanking contributors and the patience of those affected etc. I've received emails expressing gratitude and congratulations from people I didn't know were watching, in some cases people I didn't know, who were somehow involved with a project's inception and ended up on my mailing list.

Short reports are very quick to do. This is stuff you talk about every day. There's no research to do. In terms of benefit for effort, your short reports will be one of the best investments you'll make. They help control rumours; they keep stakeholders engaged and involved; they minimise anxiety and fear and they help to manage the expectations of your sponsors so that when there are problems, you don't first have to placate them.

</Reporting>

Variations

The goal posts will move. Take that as a given. Most projects involve a number of different disciplines. Consider an IT project. You can't let an IT person design a computer system. You'll end up with a brilliant solution, but not necessarily to any known problem. Likewise, you can't let business experts design a computer system because you'll likely get an electronic version of what they already do and while that might have some benefits you risk missing the opportunities that the technology offers. The ultimate solution is born of the

collaboration between IT and business experts. Nothing new so far, but if you think that you are going to build a system according to the specifications that you've come up with, then your ship has sprung a leak. While the 'design phase' might be over, the interaction between the business people and the IT people continues through testing, delivery sign-off, chance meetings in the canteen etc. Also during the official 'design phase' which concluded with the documentation of the agreed system-to-be, the business people learned a bit about what the technology can do, and the IT people learned a bit about the business subject matter. Those thought processes do not suddenly stop when the specifications are agreed to and you don't want them to. Both sides will continue to identify opportunities and problems and that's a good thing, except that it messes up your neat project phases model. The trick is to accommodate project variations. Of course, get it as right as you can before you start but in your project charter document, include a line, a paragraph or a chapter stating that all variations to the charter, including outcomes will be subject to sponsor endorsement. As well as establishing some practical terms of engagement, this also serves to manage the expectations of your sponsors. "Before we begin, please understand that this plan represents our current best estimates, which may change as we go."

</Variations>

A few dollars more

One of the reasons projects go over budget is because anyone close enough to the project will try and use the project as their own private Make-a-Wish Foundation. It saves a lot of proposal writing and cost justification if they can simply charge it to your project. Sometimes sweeteners are included in the project budget, i.e. upgrades that aren't absolutely essential

to project success, but included anyway as a way to sweeten up the work force. These are OK, as long as they have been approved by the sponsor. When there's a change in project manager you sometimes get stakeholders fishing for extras.

When I took on the PACS project, a senior neurosurgeon approached me announcing that he needed a thirty thousand dollar workstation and not the ten thousand dollar workstation he had been allocated by the project. (Although you only needed a standard browser on a desktop computer to view PACS images, a variety of more sophisticated machines and diagnostics tools were made available to radiologists, surgeons etc.) Long before the 'Big Bang Theory' (the TV series, not the actual science) and the discovery of Asperger's Syndrome I had learned that people at the peak of their profession often have strange personalities. My little inner voice told me that asking him to fill out a form might be a career limiting move. I made arrangements to see him, to get some details. I planned to write up the project variation request on his behalf and take it to the steering committee. He didn't keep me waiting. It was a short conversation.

"Why do you need the thirty thousand dollar workstation?"
"Emergency Department have got one."

And that unfortunately, was it. I stared at him in vain hoping for some expression of humour or perhaps more information but there was nothing. For a moment I sat in silence remaining absolutely motionless, fearful that any muscular activity in the region of my face would result in hysterical laughter. I suspect that awkward silences were common-place in conversations with my neurosurgeon because he didn't seem to notice. Eventually I asked him to visit the Emergency Department

and make a list of some things that their workstations did that his didn't, which I would then take to the steering committee on his behalf. As it happened, my predecessor had done his work very thoroughly and the neurosurgeon didn't need the features that the extra twenty thousand dollars bought.

The trap is that you can neither agree nor disagree and when those more articulate than my neurosurgeon are pouring their hearts out making justifications to their claim it is often difficult not to agree. Clearly if you show a hint of dissent you will be cut to ribbons because it is their area of expertise and not yours. Unless you are also a neurosurgeon of equivalent standing, being part of the conversation about what tools are appropriate is going to be seriously career limiting, but you are equally unqualified to agree. Even a casual affirmative nod can result in an email copied to you and to your sponsors getting back to your desk before you do saying, …'and the project manager agrees....'

Remember your project manager's mission. Practise staying diplomatically supportive but politically neutral. If all else fails, explain the project variation process to them, like I did with my neurosurgeon.

</A few dollars more>

Fire fighting

Even the happiest projects are not going to unfold exactly as first anticipated. Whether the office stays happy or turns into a badly scripted re-enactment of the Spanish Inquisition depends on how you navigate around the obstacles.

Your project variation management methodology is one fire extinguisher but there will be fires and obstacles outside that particular realm of your control. Your general purpose weapon is 'issue management.' An issue is anything that

threatens the project triple constraint or cornerstones, i.e. time, cost or deliverables. If anything threatens to make the project cost more, take longer or not deliver as promised then you have a problem. If it cannot be brought back in line with the resources at your disposal, as listed in the charter, then you need to escalate the problem to the sponsors. Good project managers will come armed with options and recommendations but it must ultimately fall back on the sponsors to decide what to do. Your job is to document. Keep an 'issue log.' For every threat, record dates, times, persons responsible, actions taken and outcomes. If the project ends happily no one will ever see your issue log. It will get filed away with project archives for the legally required period before being destroyed. If, on the other hand, there's finger pointing happening, you need to be able to attribute blame appropriately and at the end of the project it will be too late to recall, so you need to maintain the issues log in real time. On the PACS project (see 'War Stories') the vendor signed a contract which offered to pay five thousand dollars per day for every day the project was late. The product was eventually commissioned several months outside the time-frame described in the business case. The question, "How much can we bill them?" was raised. In this case, to the best of my knowledge, that course of action was not pursued, but if it ever is and lawyers get involved then your answers had better be numeric and devoid of the words 'I think.' Some delays were caused by the client and some by the vendor and if you rely on your memory, it had better be better than mine!

Obviously the earlier you find out that things are going wrong, the better your chances of being able to deal with them gracefully. So how do you find out things are going wrong? Meetings are the obvious and formal source of data

but they're not always enough. Spend an hour each day looking at what tasks are supposed to be happening. For each task, get the person responsible on the phone. "How's it going?" "Do you still expect to be finished Tuesday?" "Do you need any assistance?" If you don't ask, you won't know until Tuesday and if the answer is not good, then you have no room to move, no opportunity to take corrective action. I love email because of its convenience and the fact that there is indelible record of the communication but in this case don't rely on email or text messages. You will learn a lot about the probability of getting the task finished by Tuesday by the tone of the other person's voice, their choice of words or the sound of poker machines in the background.

</Firefighting>
</Project execution>

Project closure

Handover

Your final act in many projects will be to 'hand over the keys' metaphorically speaking but there's a bit more to 'handover' than just that.

I can think of two aspects to 'handover.' The first and most obvious is that the payload of the project, i.e. any revised policies, procedures, products etc. must replace the relevant current policies, procedures products etc. It's worth noting that creating, rehearsing, documenting and even the execution of that cut-over process is not part of the 'closing phase' but is part of the payload itself. The line between 'execution' and 'closing' is not as clear as 'planning' to 'execution.' The important message is to start designing the cut-over process very early on in the project. The PACS project is a spectacular

example. Although the product was technically sound and universally popular during the planning stages, the industry experience was that the actual workplace take up was very slow. Under pressure people generally revert back to what they are familiar with and if you're looking at x-rays, you're probably not reminiscing about your last vacation. We learned from that experience. Our entire project was oriented around cutting production of film, and not 'implementing the PACS.' Long before the machines had arrived the 'workplace readiness team' was designing the transition from the use of film to online x-rays in every department in every client hospital. This group of very clever and a little bit sneaky people delivered project benefit worth millions of dollars.

The second thing to 'handover' and another reason for projects to go over time and over budget is that they can be hard to finish. There are always opportunities that were identified during the course of the project that one stakeholder doesn't want to let go of; or unfinished items critical to at least one stakeholder which were promised and therefore you can't go home until they're done.

You have no official obligations regarding opportunities identified during the project, assuming they are outside of your scope, but ignoring them would be missing an opportunity to do some good for very little effort and could also burn bridges upon which you could later come to depend. The idea is to find a new owner or sponsor for the opportunity. Even if it doesn't warrant immediate action, it needs to be kept on the books so that as the priorities change within the organisation, the relevant stakeholder has a button to press.

You do have an obligation to address outstanding issues, but that doesn't mean you can't palm them off. The question you have to ask yourself is whether the resolution of the final

items requires the attention of the project team as a whole. If the answer is 'no' then perhaps you can find another owner for this task. Say the delivery and configuration of a high spec laptop for a significant stakeholder is listed as a project deliverable. Everything else is done but the laptop isn't there yet. Accepting delivery of computers and configuring them is what the IT department does. Have a chat with the IT manager. The machine is paid for; it's just late. Can it become an IT help desk item? That way the delivery still has an owner and is still being officially tracked. If the answer is 'yes' then you can cross it off your project list and although you can't count it as an achievement just yet, you can disband the project team and close the budget.

The principle is simple enough but given that you have no actual authority and what you're proposing is apparently contrary to your project mandate, this can sometimes involve a bit of negotiation. The 'palm off' has to meet with the approval of the affected stakeholders so it has to be a realistic alternative management which will see the delivery through. Therefore, it's not just a matter of pasting names next to outstanding tasks. Here are some steps which might help:

Step 1. **Find an appropriate owner:** 'Appropriate' means that they can and they will. 'Can do' means they have the ability, the authority, the resources and the time. 'Will do' means they have the desire to do the task and the respect of the stakeholders.

Step 2. **Agree verbally:** Have a chat with them informally and completely free of obligation. Perhaps they could be the new owners or perhaps they could suggest someone better.

Step 3. **Confirm it in writing:** Do the email thing. 'Thank you for your time just now, just confirming...' Give them a second chance to think about it so that disputes are not public and misunderstandings don't burn bridges. Copy in your sponsor, to give them the opportunity to confirm or dispute the suitability of the new task owner.

Step 4. **Publish!** You have no actual authority but you are the central conduit of information for a significant number of stakeholders. Once you're sure that the recipients have read their emails and had time to respond if they were going to, then use your broadcast medium, whatever you use for your regular short reports, to tell everyone that this task now belongs to this new owner.

If all else fails, there are your sponsors. In most cases they will be keen to see the project closed and will help to find owners for outstanding issues.

</Handover>

Closing the budget

I've attempted to address Accounting 101 for project managers under the heading of 'Project Financials.' Amongst the 'how to's' the primary nugget to take from that section is to make friends with the company accountant. You are part of the paper trail that they use to authorise payments but they are the ones who handle the actual money and only they can stop payments made in the name of the project. Unless otherwise stipulated by your sponsors, the process you follow is similar to the handover:

Step 1. **Agree verbally:** Have a chat with the accountant and your sponsors noting that all the bills are paid (or funds are allocated for the outstanding items which have been handed over).

Step 2. **Confirm in writing:** Do the email thing, 'Thank you for your time.... Just confirming that as of now the project budget is closed....'

Step 3. **Publish:** Give the accountant and the sponsors time to read your message and respond if they've had second thoughts then the use your mailing list to tell all and sundry that the project budget is now closed. Make sure that the accountant and the sponsors are cc'd on that message. You have no actual power or authority but you are the primary communications conduit and that's where your power lies. George Orwell was right about the power of information. You're not pulling a swiftie. You have had an open and honest conversation with the sponsors. The accountant has agreed that it's OK but they can still change their minds. However, after the closure has been published the onus will be on them to explain how item X got charged to the project after it was closed.

</Closing the budget>

PIR

Post implementation reviews ('PIR's) are officially on the agenda to learn from the project's mistakes and although sometimes in their haste to close off the projects, sponsors are happy to see them not happen, it's generally worth

having a PIR on the project timeline. Officially they're for looking into the project payload. Did it deliver what was promised in the business case? Did the project deliver on time and within budget? Did the various contributors (staff, vendors, sponsors etc) help or hinder? How were those relationships managed?

PIRs have a practical use for the project manager too. They can be a way of delaying a bun-fight. If the resolution of an issue is being hampered by finger pointing, then you can say to all parties,

"The time to learn from our mistakes is the time we need to establish who was at fault and the time to do that is the post-implementation review, which comes later. Right now we have a problem that needs fixing."

Not only does that allow you to get on with the job but at the post-implementation review, much later, tempers have usually died down and there is a much greater opportunity to actually learn something from the mistake.

</PIR>

Party

A project funded party is always a good way to let off steam but there's more to it than that. It's an opportunity to acknowledge the transition pain that some stakeholders have gone through. It's a way of acknowledging and rewarding those whose exceptional efforts helped get you across the line. It's an opportunity to say goodbyes before the team disbands and it offers closure to what for many will have been a traumatic period.

</Party>

</Project closure>

And now for something completely different - Agile

I maintain that if we are going to salvage some of the billions of wasted project dollars we need to look at project management differently. Well, a splinter group of project managers has been doing just that. They have strayed a bit left of convention after looking at the structure and dynamics of highly effective teams, including military corps in real battle situations. As you will see there are still pros and cons but it represents the magnitude of mind shift needed if we are going to make a dent in the current disastrous situation. The methodology is known as 'Agile.'

Traditional project methodology is sequential. We tend to think in terms of 'this and then that.' Concepts lead to designs which lead to specifications, which lead to construction then testing/certification before the congratulatory champagne. It's commonly called the 'waterfall' method because if you draw each stage in a Gantt-like chart, you end up with the end of each phase cascading neatly into the beginning of the next phase and if that worked you wouldn't be reading this book.

Traditional project thinking is to lock in a design before building. 'Agile' starts with the assumption that you can't. If you are really building something new, then the building process and the learning process can't be entirely separated. Accommodating late specification changes is about as practical as trying to stop a freight train with a tooth-pick. If you haven't read the 'Project Manager's Mission' section, now would be a good time to get to it and give it a scan because right or wrong, you need to understand what I mean when I say 'vision' in the context of mission and strategies.

The Agile approach is to have a clear and shared vision and agreement on any relevant strategies. Then make up a vague plan and agree on what can be achieved in the next two weeks. The builders go ahead and do their thing. The management collective meet again when the two weeks is over, then the process repeats. Looking at what has been built, the entire team reconsiders the vision and strategic choices, along with any lessons learned. The vague plan is adjusted and the next step is planned in detail determining what can be achieved in the next two weeks. The design and build processes are intertwined. The collaboration between areas of business and technology continues for the duration of the project until one of two things happens. Either the vision becomes unattainable or the team will deliver an optimal solution.

There is obviously a whole lot more to Agile including clever strategies for shortening meetings, dealing with issues, challenges, work backlogs and capitalising on lessons learned.

So why hasn't Agile taken the world of project management by storm? In some areas it has but not universally for a number of reasons:

(1) It doesn't always work. Agile was born through the study of highly effective teams like sports teams and military squads. Team dynamics change as the membership grows. If your workforce is more of an army than a squad then Agile is not going to work so well. If the outcome is pre-determined and clearly defined then Agile offers little in the way of advantage.
(2) Exponents of Agile have, in part, themselves to blame. An Agile built team in full flight is like a feeding frenzy in a shark pool; like the kindergarden play room floor

when the Lego blocks start to take on the shape of a castle. Every aspect of human nature is exploited including competition and group-think all in the name of productivity. The effect can be intoxicating. When you realize what can be achieved using Agile, it's like standing on the edge looking in on a brave new world and it's hard not to be seduced into thinking this is all-important and all-encompassing. It becomes like a religion and the associated lack of objectivity makes people susceptible to ridicule.

(3) Mathematicians and managers modelling the world like their theories to be universally applicable. If an example can be found which does not behave according to the model, then the theory behind the model must be wrong. Because Agile cannot be applied to all projects, it tends to be dismissed as a theory, which is a pity because the current 'one size fits all' methodology clearly isn't working either. It is difficult to apply Agile to very large projects or projects with a large number of interfaces. In those circumstances there's no way around the need to agree on specifications first. Agile's niche seems to be small projects where the optimal solution does not conveniently present itself at the beginning. If you are building a docking system for a space craft to connect to the international space station, then there is not a lot of scope for creativity. On the other hand, if creativity means 'edge' like software development, then Agile may well be for you.

(4) Project managers who don't practise Agile but borrow elements of Agile (like me) can give Agile a bad name if they don't do it sensibly. The Manifesto for Agile software development says: 'We value working software over

comprehensive documentation.' Outside the context of an Agile project this is an excuse not to document.

(5) Finally and perhaps most significantly, lawyers don't like it. Specifications and quotes can be costed, scheduled and written up into contracts and when it all falls into a screaming heap, blame can be allocated by comparing actions to documented promises etc. and the company lawyers get a new Porsche. Cynicism and bad lawyer experiences aside, we are administratively unaccustomed to commitments which cannot be quantified.

Imagine presenting your proposal to the board,

- "I see a product where.....<insert vision here>"
- "If we can build it for under a million dollars, it would be well worth while and I think we can."
- "I reckon that we can do this first bit in under two weeks. If we commit to that, it will cost us fifteen thousand dollars and after that we'll have a much better idea of what's achievable."

By now the Director of Finance has decided that you're a basket case and you're not getting your fifteen thousand dollars, even though earlier she agreed to a six million dollar project which, historically, has a five percent chance of delivering a serviceable outcome, but it did come with a comprehensive plan and a budget.

I believe the obstacles to be artificial, created by our own bureaucracy and if we can overcome them we've taken an enormous leap for mankind. So now I'd like to apologise to all the lawyers I've offended and beg you to consider ways of incorporating this kind of thinking into business contracts.

There's obviously so much more to Agile. It's about leadership versus management and there are some useful tricks like 'spikes.' Early on in the project the team identifies areas of weakness in team knowledge and experience. At this stage the project parameters don't exist to test the weak areas but rather than wait, nominated members or sub-teams target the gaps engaging in exercises possibly unrelated to the actual project in order to get answers to questions like, 'Can the technology do...?' The trouble with 'crossing that bridge when we get to it' is that if the bridge is not crossable, when you get to it, it's too late to choose an alternate route. If the bridge crossing looks like it's going to be a lot of work, then the appropriate forces can be marshalled earlier so that the main body of progress continues more steadily rather than in leaps between hurdles.

Agile represents a radical departure from conventional thinking. Applied well, to the right projects, Agile is project nirvana. It is not a methodology for all projects, but it gives you an idea of the scale of re-think required if we are going to salvage future projects from their otherwise inevitable doom. Perhaps more elements of Agile can be applied to larger projects. Why not iterative development? Given the cost blow-outs and failure to deliver that we have become used to seeing on large scale projects, why commit the full budget to the project? Why not limit your commitment to what can be achieved in a time boxed iteration, for example, two weeks or one month?

</And now for something completely different - Agile>

</How it could be taught>

The perfect PM

I've seen project management excellence in the most unlikely places. My friend, Pauline, for example. There are no superlatives worthy of how well we did ***not*** get on at first, but as I watched her in the workplace I began to admire her and I like to believe the converse is also true, but I'm not game to ask. Either way we ended up house mates as she needed a place to stay while her house was being built. I watched her deal with shoddy workmanship, dishonesty and general incompetence quietly and calmly but with ruthless efficiency. The amazing bit is how she could sit and have a beer or a cup of tea with the trades people on site while they talked about obstacles and what had to happen next. They always seemed pleased to see her. She had a very clear vision and realistic expectations. She had done her homework. She did not lose her temper, at least not in front of them. She exposed dishonesty with calm indifference rather than retribution, remaining focused on the required outcome. In the end the house was completed to her satisfaction without compromise.

So what sort of person makes a good PM? I've attended a number of motivational seminars where they explore the seven attributes of highly effective people and I have come to the conclusion that if you ever meet someone with all of

the attribute boxes ticked then your only choices are to marry them, because you surely couldn't afford them; or shoot them, because they're obviously possessed by aliens. There is merit in attention to detail and there is merit in seeing the big picture, but in human terms the characteristics tend to be mutually exclusive. We tend to be one or the other. Most management schools put you through some kind of personality profiling exercise. I like these exercises because they are fun but rather than trying to become an impossibly-good-at-everything person, use them to become aware of your strengths and weaknesses as they pertain to project management, and use that knowledge to populate your team with skills that complement yours. I am a big picture person. I have difficulty reading the credits after a movie because I tend to want to absorb it as a picture. I have to consciously choose to focus on one line and read it. For me, having someone in the office with a strong fixation on details is going to lead to lots of arguments but it will invariably save me from being blind-sided because I've missed a small but important detail. In reality, you're not often going to be given the chance to choose your team; however, an awareness of what sort of people are on your team will help to identify potential areas of vulnerability.

The personality profiling exercise I like the most so far is the Jung Myers Briggs typology test. It breaks down a personality type into four parts. This is my interpretation:

Personality Part	ie	Possible Values
Energy	Where do you get your energy? It's Friday afternoon. You've had a hard week and you need to recharge your batteries. What would you like to do? Do you like to be home, curled up on the sofa with a book? Or would you prefer to be at the pub with friends?	**I**ntroversion (if you like the book) **E**xtroversion (if you like the noisy pub)

Personality Part	ie	Possible Values
Reconnaissance	How do you gather information? Do you see the big picture first or do you see the details first?	**S**ensing (if you're a details person) I**n**tuition (if you're a big picture person)
Decisions	How do you process information? Do you make decisions based on gut feelings or numbers?	**T**hinking (numbers) **F**eeling (gut)
Execution	How do you implement the decision? Are you a 'stick to the plan' person? Does ticking off an achieved milestone make you feel good or do you like to hang onto your options?	**J**udging (if closure is good) **P**erceiving (if having options is good)

The outcome will be a profile consisting of four letters being one of I or E (Introversion/Extroversion), one of S or N (Sensing/Intuition), one of T or F (Thinking/Feeling) and one of J or P (Judging/Perceiving). You can do the test online. At the end there's often a button to list famous people who have similar profiles to yourself. It can be quite enlightening.

One morning, my house-mate and I were getting dressed to go out. The music on the radio was interrupted by some breaking local news. Apparently a police officer was hospitalised after being assaulted by two men on a motorcycle. There were witnesses. Of the two men, one was average height and wore grey overalls. The other was slightly shorter and wore blue jeans and an army jacket. Both had blue helmets. I looked up at my reflection in the hall mirror. I looked at my house-mate who was already looking back at me. Even my bike matched the description given. This was going to be a rough day. Looking at your own personality type is like

looking in the mirror. It's an opportunity to see where you're most vulnerable, so having done the test, consider your personality's four aspects and their implications to a day on the job as a project manager.

Jung Myers Briggs – Personality Typology & the Project Manager

Personality Aspect	*You are...*	*Project Managers Horoscope*
Energy	Introverted (I)	You may find meetings and presentations of project start-up exhausting. Schedule some alone time to recharge our batteries.
	Extroverted (E)	Be careful not to interpret all the positive vibes you get from people as cooperation.
Reconnaissance	Sensing (S)	Developing accurate plans takes time. You may have to deal with impatient stakeholders.
	Intuitive (N)	You will be going in the right direction but remember to look where you walk. Missing detail is your biggest risk.
Decisions	Thinking (T)	Be careful not to use a decision table to the exclusion of the expertise around you. Ask your team. If it doesn't 'feel right' then perhaps it isn't. Revisit the decision parameters and their significance.
	Feeling (F)	You'll go with your gut, but remember to go back and do a decision table to ILLUSTRATE how you made your decision. If you can't then perhaps you need to revisit the question.

Personality Aspect	*You are...*	*Project Managers Horoscope*
Executing a plan	Judging (J)	You'll finish on time but have you missed any opportunities? How many toes did you have to step on to get there? Try not to burn any bridges unnecessarily.
	Perceiving (P)	You'll design a better outcome but remember that time has a way of diminishing the value of an achievement.

The project manager's mission

If there is an underlying mantra to this book let it be to focus on the 'why' rather than what, how, who or when. To strive without a mission is to drive without direction. The appreciation of the ultimate purpose behind each task will guide you as to what has to happen, who is best suited and when it should happen. When you understand exactly why you have to do something the mechanics of who, how, when etc. tend to present themselves. The 'why' will pertain to your particular and unique situation and may be relevant only at that one point in time. It is the one thing that an Internet search will not help you with. I learned about mission-oriented management from an order of Catholic Sisters.

I had the great privilege of working for the Sisters of St John of God for seven years, during the time when the sisters still ultimately controlled the organisation. The Sisters created and ran a healthcare organisation comprising a nationwide chain of hospitals and a number of diagnostic and medical centre facilities. Although I believe that Jesus

must surely have been the coolest dude to walk the face of the earth, to me whether Mary was a virgin or not bears no relevance to what Jesus was saying. I'm technically not even a Christian; however, that didn't matter to the Sisters. "Our mission and values are clearly stated. You don't have to be Catholic to work on our mission or to abide by our values." I learned from the Sisters how to use mission and values to make business activities focused, efficient and profitable. To the Sisters, the mission statement was not just poetic prose to adorn the walls of the boardroom. They lived it and breathed it. Let me give you an example.

I had a young work experience fellow working for me. He was absolutely invaluable and it wasn't hard to convince management to create a substantive paid position for him. Before the Sisters, the Australian federal government paid my bills. Junior employees in the federal public service were subject to 'flexi-time' or 'banked hours.' As long as you worked seventy-eight hours and thirty minutes per fortnight, you could be fairly flexible about which hours you worked. I proposed the introduction of a similar scheme for our newest IT support staff member. My boss' response was a considered but stern, "No. He's here to perform a function and not to pass the time." I sat down with my new employee and explained the management decision. I told him that he could come and go as he pleased with the proviso that, if he wasn't going to be in the office during standard working hours, he let me and reception know so that urgent support calls could be directed to me and he could never be accused of being AWOL. The effect of that conversation, apart from that he seemed to grow yet another ten centimetres taller than me, was that I had a lot less paperwork to do and he seemed to spend a lot more hours in the office than

he was required to. The office network ran like clockwork. Rules and regulations are less important when your team shares a vision and a mission.

Sadly, many of the organisations I've worked for since do in fact, simply use the mission statement to adorn the walls of the boardroom, and to fill glossy brochures with eloquent picturesque general motherhood goodness words. The concept of 'mission' is that it gives you purpose. If an organisation has a mission, then the mission statement should expound the very essence of the organisation's existence. It should pertain to each employee's every waking moment on the job from the CEO to the cleaning staff and even lawyers. When I see a corporate mission statement that says 'We exist to make money for the shareholders and then the staff in that order,' I'll beg them for a job because that level of honesty and clarity would surely make them not only refreshing to work for but extremely efficient. Surely nine out of ten corporations, especially those with shareholders, exist for no other purpose. Whether the business at hand is making cars or washing cars they do so to make money. Money is the 'why.' Making or washing cars is simply the mechanics of their striving to achieve their mission. Making or washing is the 'how.' Money is the 'why.'

The single mindedness of the mission gives focus to business decisions and activity. What is going to make us the most money? Now you can debate short term and long term strategies and make a decision based on the net effect, which will make you the most money.

There are a few other companion terms to 'mission,' the common use of which are equally vague. Below is one interpretation (mine). I include them here because I'm going to refer to them later.

term	definition
Mission:	The very reason your task, project or organisation exists.
Vision:	A picture of the future, in graphic detail.
Strategy:	A statement of direction or tack.
Plan:	An action list.

Imagine you are planning a road trip.

Road trip example	
Mission	to experience North Queensland culture.
Vision	to sit at a beach-side cafe looking at photos we have taken en-route. There are pictures of cane fields, rivers and people that we have met.
Strategy	- avoid toll roads - avoid unsealed roads - frequent stops, more than just petrol and supplies
Plan	- travel west on the ring road - turn north onto the Hume highway - etc.

Quite clearly, even if the destination ended up being the same, if your ultimate purpose for travelling was to avoid the in-laws, the route you take, the way you make the bookings, who you tell, perhaps even your choice of transport might be very different. "I'm sorry. Mum, we're going on the bike."

Having a well-defined mission pays. If you want a real-world example, jump to 'War Stories – PACS.' In that section I describe two similar projects. Both were technically

successful but the difference in return on investment could be measured in millions of dollars. The primary difference between the projects was that one was focused on the installation of PACS (x-rays online) and they did just that. The other was focused on cutting production of x-ray film, and they did, three years ahead of schedule. The return on investment hinged on cutting production of film not the installation itself, but it did not come automatically once x-ray images became available online.

To be truly effective, you need to understand your purpose. A subtle difference in project focus can be the difference between success and failure. So in the context of the already well-focused project, what is the project manager's mission? Why is the project manager there? What is the single-minded point of focus that governs every waking moment of a project manager on the job? Why does the role exist? I've toyed with this over the years. I started with statements about timely delivery and fiscal responsibility but it's really not true. I took on the project to implement an on-line x-rays (PACS) system for a major public healthcare provider mid-project. It was quite intimidating because what I found in the project office suggested that my predecessor was very thorough. I certainly couldn't fault his work. There were a few high level players who decided that this was an opportunity to get funding for something that was obviously rejected under the previous project manager. I found myself saying over and over again, "At the end of this project I'm still not going to be a radiographer and I'm still not going to be an orthopaedic surgeon. In fact, I'm not going to be here!" The gist of it was to stop them trying to convince me that they needed a $30,000 workstation. That wasn't my decision. It occurred to me that the ultimate project outcome would

in fact, have very little to do with me. If the vendor didn't deliver a suitable product, or if the technicians were unable to integrate it, then the project would fail, totally irrespective of my talents. So why did they get rid of their previous project manager? What was my talent? I've had a bit of time to think about it since then and this is what I've come up with:

Project manager's mission:

- to keep workers accountable for their work
- to keep decision makers accountable for their decisions
- to act as a communications conduit between them.

Now go back and review the skills needed to be a project manager and they will start to make more sense. My tip for project managers: Understand your mission. The skills you need are nothing more than clerical administration. Anyone with administration experience has the office skills to be a project manager. The mission will tell you how and where to apply those skills. If you find yourself wondering 'what do I do now?' remind yourself of why you are there. The answer will present itself. If you need to be reminded of what goes into a project charter document, a quick Internet search will give you plenty of examples of how to structure one but the understanding of the ultimate purpose of the charter will give you your content.

Note that there is nothing in the mission about the subject matter of your project. I've been involved primarily with information technology projects because my background is in computer science. That's what they called it in yesteryear. However, doing and managing require very different skill sets. I've secured contracts to manage projects because of my knowledge of the subject matter, but in terms of actually

doing the job, sometimes it is better not to know the subject matter. If you are an engineer and you are overseeing an engineering project, then it would be hard not to make assumptions about how things might work. However, it is not your engineering expertise that will deliver the project. Your job is to manage. It is the expertise and experience of the project engineer and not the project manager which will ultimately be on show at the end of the project.

When I took on the PACS project I had already decided I was done with project work. I took on the project for two reasons. Firstly, the hospital where I would spend most of my time was two hundred and eighty metres from my front door – very convenient. Secondly, the recruitment ad said, 'PACS experience would be highly regarded but not required.' The 'not required' told me that these guys were able to distinguish between doing and managing. Curiosity (and insufficient funds to retire) led me to apply. Having no prior experience with PACS meant that I had to ask a lot of questions. On more than one occasion while a team leader was patiently explaining the technology to the dumb project manager, someone else in the room disagreed. The ensuing discussion barely raised an eyebrow but had it not happened then, it would have led to a disastrous misunderstanding later. Disaster was averted simply because those doing it did the explaining and not the project manager.

If you want help in wording a mission statement for your project have a look at the chapter on 'Tools of the Trade.' The 'Happy Cake Analysis Method' was born in the classroom while I was trying to explain 'mission' to my students.

</The project manager's mission>

</The perfect PM>

Handy skills

In this section I want to talk about the sort of skills that you might call upon in your time as project manager. There are countless resources available already, so unless I have a slightly unorthodox point of view I'm just going to name them. The point I'd like to make is that there is no 'secret project management business.' The mechanics of project management are not that different from being an office clerk; however, certain skills and personality traits can come in handy.

Task management

Scheduling and tracking tasks means keeping track of who's doing what. You can do it on paper, in a spreadsheet or a database. You can use the company helpdesk software which is effectively designed for tracking tasks. There is also a variety of web based collaboration tools which will allow a number of concurrent users to be updating who is doing what. My advice is to start with something you're familiar with. If you start with a sophisticated tool, it will bend you into working the way it was designed to be used. When you have a feel for what you need, then you'll be better able to recognise a better tool if you see one. The real challenge is to know how much information to record. A dossier on every

happening on your project is only useful if you also have time to do something with that information. Collecting information is not project management. Acting on information is. Unless you have a very well-staffed project office, you're not going to be in a position to micro-manage every task. If you need to micro-manage every task then it's time to start looking for a new project anyway! Basically, if you don't have competent people working on your project it is going to crash and burn and the issue that you need to resolve with your sponsors before you begin, is resourcing. This is where inflicting a task documentation template on your project can be counter-productive. Instead, be selective about task documentation. In most cases you only need to know who's responsible. You can't micro-manage all of them so if you find you have to, walk away.

I remember the words clearly because I rehearsed them a hundred times on the way to the Chief Information Officer's office in my mind, and to the owner and general manager of the firm through which I consulted. "Come September, I will not be the project manager of a failed project. These issues need to be resolved now or I walk, now." I have probably never been so terrified in my life, but it was the ultimate and unavoidable truth. It was such a traumatic project that part of me wanted to hear, "Well F— you!" Mentally I was already packing up my things. I didn't need the money that badly.

Assuming that most of the team are pretty good, micro-manage those you absolutely have to and only for a little while. Either of two things will happen. They will catch up and start to manage themselves or you will have the evidence to take to the sponsors to support your request for additional or alternative resources.

</Task management>

Issues management

An 'issue' is anything that threatens the 'triple constraint' aka 'project cornerstones' i.e. time, cost and deliverables. Anything that threatens the ultimate cost, deadline or project payload is an issue which you need to track. I keep a simple spreadsheet. Each issue is recorded as a row in the spreadsheet with some basic information like dates, owners, activities, decision outcomes, including the impact on time, cost and deliverables. The row number of the issue in the spreadsheet is used to file any associated paperwork in numeric order.

Tracking issues is a thankless task for which the very best outcome is that the issues file never sees the light of day. It is, unfortunately, a necessary evil. For more about managing issues, skip to the section on 'fire-fighting.'

</Issues management>

Scope

'Scope' is simply what's in and what's out, which sounds pretty straight forward but remember that lack of scope clarity is a popular reason for project failure so it's worthy of some scrutiny. In some text books 'scope' refers to time, cost and deliverables, popularly referred to as the 'triple constraint.' You'll see these three drawn as a triangle in every project management course you'll ever do. In practice when people say 'scope' they're often referring just to the project deliverables or measurable outcomes. So for the purpose of clarity I'll talk about the 'deliverables' that are in scope.

A scope statement is generally a list of measurable achievable project objectives. It is the definition of the project

payload. I quite like bullet points myself, structured like a tick list so that when each one is ticked off, you have delivered as promised. There's no room for general motherhood statements or wish lists. Each project objective must be measurable in order to quantify 'done.' There can be no ambiguity as to whether an objective has been achieved or not. A good strategy is to tabulate your in-scope objectives against a list of tests which will verify delivery. For example, if a project objective is 'to establish a high speed data link between building A and building K', the associated test might be, 'Using a workstation in building K, Susie will download a two gigabyte image file from the server in building A and it will take less than thirty seconds.' Some who read this will think, "Yep that's a fast network" but others will be thinking, "How old is this document? That's woeful!" That's precisely why the success criteria must be quantified at the start. Each 'test' must include who's responsible for deciding whether it is a success or not. It must identify what actions will constitute the test and exactly what outcome will indicate success. When you've completed the table, separate the information. The objectives become the scope and the tests become part of the 'quality plan' or 'success measurement.' However it's documented make sure that the project technicians agree that the test represents a conclusive assessment and make sure that the sponsors agree that that's how success will be measured. Also make sure that all of that agreeing is on record.

I would consider the above to be good advice but hardly rocket science. So why is it so hard to get right? One reason, for example, might be that upon discovering that the office kitchen is to be renovated, it is not unreasonable for a stakeholder to assume that they're getting new appliances, which is about time because the microwave sounds like an aircraft on take-off and

makes the nearby monitors flicker when in use. How angry are they going to be to find the old microwave in the new kitchen? The scope of the project was limited to building a new kitchen. There was no mention of buying new appliances. Regardless of who's to blame, that much ill-will at the end of the project is not going to reflect well upon your performance. Furthermore, if the offended stakeholder has enough clout the project might be forced over budget to accommodate what they thought they were getting all along. So not only do you have unhappy customers but you've also gone over budget.

This scenario happens all too often and can be avoided without too much work. Imagine a random scattering of seashells on a beach. You draw an imaginary line around an interesting selection and because you don't want to spill your umbrella'd drink; you ask your kids to pick them up for you. Can you hear yourself saying, "Not that one!" quite a bit? The line in the sand is defined as much by what's out as by what's in. When you're writing up your project scope look for related items, opportunities or 'maybe' items that were excluded, and list them also. Have two sub headings to your scope:

- objectives included
- objectives excluded

If your significant stakeholder knew at the start that 'new kitchen' did not also mean 'new microwave' they might choose to have some quiet words with your sponsor and perhaps extra funds would be found so that the new kitchen will get a new microwave. What's important is that the argument happens before you start so that regardless of the outcome of that discussion, any residual discontent will not be directed at you and will not hamper project execution.

</Scope>

Time management

I did a time management course many years ago. I remember few details but I remember that I learned some valuable lessons like sometimes the desire to organise the office can lead to double handling. Sometimes it's better to just do it or dump it on the spot. Suffice it to say that if you have the opportunity to do a time management course, do it.

</Time management>

People skills

Leadership

The manager is the one you go to when you need a leave pass authorised. The leader is the one you go to when in trouble.

While working for the Bureau of Statistics in the late eighties, our department was tipped off that there was to be an external audit. While the department operated fairly efficiently it was not well-managed. For example, some staff were several years behind with their time sheets. In the middle of the chaos that ensued stood Andrea. Andrea was larger than the socially accepted anorexic norm, of Greek descent, the office trainee, the most junior person in the department, eighteen years old and one of only two females. Although not treated badly, Andrea was generally ignored as she went about her filing tasks, until today. Today Andrea stood in the middle of the open area office giving orders. Everyone, including the department manager, took orders from Andrea. I was at my desk busy with my allocated tasks but all the time, out of the corner of my eye, I watched Andrea. She was like Captain Janeway at the helm of the

starship USS Voyager fending off an alien attack. Around her was a blur of frantic activity but in the centre, clear and composed overseeing her minions stood Andrea. I wondered if anyone else noticed what was happening. Tomorrow the office would be a boy's shop again and Andrea would be the slightly awkward office clerk once more but today she was our leader.

I like to talk about leadership vs management in my classes and pose the question: 'Is project management leadership or management?' By this stage I've got my students thinking of themselves as project managers and they like to think of themselves as leaders; however, the ultimate success or failure of the project will depend on those making the decisions and doing the work. Your job is about managing accountability. By my own definitions project management is more management than leadership. However, if you have the opportunity to do some leadership training, I highly recommend that you take it. It is always easier to work with people who are inspired and motivated, and sometimes the difference is just showing them a little respect.

</Leadership>

Interrogation

I once had to interview thirty applicants to fill eight positions in the public service. Twenty-nine of those interviewed could have done the job well but it was not enough to pick the best eight. I was required to rank all thirty in order of merit. Attempting to differentiate between the applicants I began to realise that the answers that I was judging them by were as much a reflection of my questions than of the applicant's suitability to the task. Several years later, I was given a lesson on how to do it better.

Part of a major information technology upgrade for a Bunbury hospital in Western Australia was the recruitment of an IT manager. Being from the somewhat remote corporate office, I was happy to conduct the interviews but I did insist on a local representative for the interview panel. The nominated individual was the hospital engineer. His job was all about supporting infrastructure and services like air conditioning and lighting. Although in a highly regarded position, he was not part of the management team to whom the IT manager would report. He had little experience with computers and I was slightly annoyed, thinking that they weren't taking the process seriously and that this poor bugger had drawn the short straw. Then I met him. It turned out that in a past career he worked for a recruitment firm. He asked what I wanted to learn about the interviewees and looked at my questions. He shook his head then set about explaining why my questions were crap. It was a spectacularly enlightening experience. We re-wrote the questions together and I've been thinking about interviewing techniques ever since.

Information vs questions

When interviewing prospective house mates, a popular first question is, "What do you do for a living?" It is a reasonable question. One's chosen vocation can tell you a lot about their character, social standing and wealth. Now play this scenario backwards. You want to know about someone's wealth, social standing and character. How does this add to the questions you might ask your interviewee? How did they end up in that vocation? For example, was it choice, inheritance or lack of options? How long have they been doing it? You will be much better equipped to ad-lib questions if

you are focused on the information you need rather than the questions you need to ask.

If the only thing you are concerned about is getting the rent then consider that while an unemployed person is more likely to have problems paying the rent than a stockbroker, the hippy may be more forthcoming with what he has than the greedy stockbroker. The information you actually want is not only ***can*** they pay the rent but also ***will*** they pay the rent? "May I see a current bank statement? If I were to contact your previous landlord, what would they tell me about your rent payments?" Try to overcome the desire to start with writing questions when you have to interview someone. Firstly decide what information you need, then construct questions that will give you that information.

</Information vs questions>

Personal questions

Having convinced the Defence Security Branch that I was technically and managerially suitable, I then had to go through a security screening exercise which involved some very personal discussions about everything from parking fines to sexual partners and where I had met them. My interviewer was a well-spoken and articulate, gentle, mature-aged woman who casually explained to me that they were interested in my moral, ethical and legal 'boundaries' and whether they could be exploited. Basically they wanted to know if I was susceptible to blackmail. Apparently I wasn't. The interviewer was quite disarming and I felt inclined to be generously forthcoming with information which turned out to be the right thing to do.

This was such a perfect exhibition of interviewing technique. Perhaps this is a reflection of my age but to me sex and

sexual partners tend to be things one does not discuss in polite circles. This would be a topic for the pub after the consumption of some social lubricant, not at a job interview. One may be reluctant to answer and if pressed might be inclined to lie, in the name of modesty of course. So if you want honest answers, how do you go about asking personal questions?

I give my TAFE students the following scenario. It is tragically a true story from my younger days. This is an attempt to glean an educational positive from a very dark memory.

> You are at a party. There are lots of people and lots of noise. You are in the bathroom because the lounge room is full and besides, the bath is being used as an ice chest for the drinks. You have had several alcoholic beverages. You are not inebriated but socially well-lubricated. In the conversation, you are trying to make the point that because a woman has a much greater fat to muscle ratio than a man and because muscle is heavier than fat, a woman would be expected to weigh significantly less than a man who was physically the same size. There is a woman in your group who is approximately the same physical size as you.
>
> I considered Sheryl to be the sexiest woman I had ever met. She was a big girl in that she was as tall as me and built like me, only with more feminine curves. For the record, back then I would have described myself as having a slightly larger than athletic build. I didn't consider myself 'fat.' In fact, at the time I was quite self-conscious about being scrawny. I didn't think of Sheryl as fat. At the time I saw nothing wrong with asking her to stand on the bathroom scales.

By now most of the class were giggling hysterically at my obvious social incompetence so I put it to them,

"How should you ask the question?" I left them in small groups constructing some interview questions while I went to the staff room to coax a female colleague to visit my class. She was coincidently physically similar to me but unlike poor Sheryl, Annette had been fully appraised of the situation. When we returned to the classroom I introduced Annette. "I believe you have some questions for Annette?" I could see members of each group looking at their questions, then looking at Annette and then squirming. There's usually one bolder than the bunch who will give it a go. They soon learned that it is so much harder in practice.

As a project manager you will be asking lots of questions. You may or may not have the occasion to solicit personal information but be aware that asking questions is a skill, one that can be learned and one that can serve you well.

</Personal questions>
</Interrogation>

Negotiation skills

I left a project. In fact, I left the organisation because I felt that my sponsors, the company executives, were sitting on the fence too much and not getting involved when I needed them to do so. It was their decisions I was trying to implement but they lacked the will to get their hands dirty when it came to dealing with the recalcitrant employees. It was a tactical error on my part. I backed the executives into a corner where they had to react to disobedience but they didn't, which made my position untenable. My successor was someone I hugely admired and still do. The handover period was a week, during which she could observe and devise her own strategies. Unfortunately, I had tonsillitis, bad. I could barely say two words without excruciating pain. However, delaying

the handover would have served no one, least of all me. I apologised as best I could and said to Susie, "You've got to deal with them sooner or later. It might as well be now." At our very first project team meeting Susie was bombarded with stupid, irrelevant crap. The language was highly offensive, sexist and inappropriate in topic and tone. I could see what they were doing. They had directly disobeyed a corporate directive and gotten away with it. They'd successfully gotten rid of one project manager (me) and they wanted to establish the pecking order with the new project manager from the start. Susie was getting hammered. I was quietly fuming and getting ready to interject but I hesitated because of the throat pain that I knew would accompany each word. In the delay I was treated to a lesson in negotiation skills. Susie took the report that they had been arguing about in hand and waved it about in the air. "This is very important," she said. "And we will come back to it, I absolutely promise." Then, still smiling and with grand gestures worthy of a guest appearance on Wheel of Fortune, she placed the report on the ground in the corner of the room. "For now I am putting it aside because we've got even more pressing issues which we are going to deal with one at a time." As the meeting dissolved, there were smiles all round but there was absolutely no doubt as to who was running the show. In the car on the way home I couldn't hold back any longer. "Where did you learn negotiation skills?" I asked. Susie laughed. She looked at me, even though she was driving. "That's easy," she said. "I have three children." She treated them like children, which is fair enough because they were acting like children, but they loved it! Without a raised voice or hint of confrontation she had let them know that she knew their game and could play it just as well. I relaxed back into the passenger seat

and watched the road appearing in the headlights, all the while thinking, wow! This was an element of human interaction which was as foreign to me as Klingon (a reference for my Star Trekker friends). That was thirteen years ago. Susie is now my life coach.

In some of my courses I talk about negotiation skills. Occasionally, a bright student who has actually been paying attention challenges the relevance of 'negotiation skills' to project management. They will quote the PM mission that I've given them. 'If my opinion doesn't count why do I need negotiation skills?' If you're thinking along these lines then kudos to you for paying attention and getting it and it's time to go to the next level where you learn the project management 'rule number two' which is 'there are no rules.'

If the executives are at odds with the rank and file members of the team, who do you think is going to win the argument? My money would be on the executives for two reasons. Firstly, because one would generally expect the executives to have a consummate appreciation of the big picture, and secondly, because the executives got to be executives because they know how to win an argument and sometimes logic is the casualty. Yes, ultimately your job is to keep them accountable but your job is also to act as the communication conduit between them and sometimes that communication needs facilitation.

I am supremely lucky to have survived telling my CEO that I didn't like his 'attitude to computing' with my career intact. On the same day I had told my director that he had made some serious errors in judgement on the project I had been sent in to fix. I suspect that my immediate supervisor may have got a talking to about teaching me a bit about diplomacy but in both cases my message got through despite my

lack of tact. These people are pretty unique. Putting your bosses ego in a blender is not generally a good career move. Subject matter experts like technicians, engineers, builders, programmers etc. are there because of their expertise in engineering, construction, technology etc. Sometimes they lack the articulate prose necessary to advise an executive that they're perhaps about to make a bad decision. It may well be that they have another agenda and that the executive is right but on one side of the table you have a technician who's thinking, 'I'm the expert, you should listen to me' and on the other side you have a professional negotiator who's used to getting his/her way. Your job is to make sure that logic sees the light of day. To do so, it sometimes helps to understand the process of negotiation.

Communication skills in general, oral, presentation, written, diplomacy and protocol are essential to good project management. To this day I'm somewhat ashamed of my behaviour during the Professional Communication classes that I was forced to attend at uni. I resented that it was a core subject and I was a little bit rebellious. I was there to study technology and not this arts rubbish. Ironically, it turns out to have been one of the most valuable classes I have attended, and Karma that I'm now teaching project management to TAFE students who resent having to attend my classes for the same reasons I resented having to do 'Professional Communications.'

</Negotiation skills>

Managing upwards

See also: 'negotiation skills.' One of the most difficult jobs you'll do as a project manager is to communicate to the ones who write your pay cheques that things aren't going the way

they'd like things to go, and that perhaps they've made a boo boo. I highly recommend the application of a liberal dose of tact and diplomacy. Diplomacy is not my strength but I would suggest that, as an absolute minimum you try to give them an opportunity to save face and/or take credit for the change in position themselves.

Two principles come into play here. Firstly, the truth is not negotiable. It is critically important that it is told, preferably by you, the project manager, and preferably to the decision makers before they hear about it from any other source. Remember that your role is about keeping decision makers accountable for their decisions, which you cannot do if you don't keep them informed. While the information rests with you so does the responsibility. Pass it on and let those whose job it is to make decisions do their job.

Secondly, you must accept the authority of the decision makers and respect their decision whether you like it or not. At this point your role is to ensure that there is a formal record of the decision. This is where it can get ugly. Likely scenario: your ego is going to take a hit so that your 'superiors' can save face. I'm OK with that. A worst case scenario is that your integrity takes a hit so that the bosses can protect theirs and that is not acceptable.

</Managing upwards>

Conflict resolution

'Organisational change management' would be on the top of my list of skills relevant to project management, with negotiation skills a little further down. You can use these to avert conflict but sadly not always. My conflict resolution material comes from a quick Internet search and picking out

the bits most relevant to my experiences. If you feel it's relevant to your situation then I highly recommend doing your own research and perhaps doing some conflict resolution training. Interpret what you see and hear and create your own conflict resolution manual. Applied wisdom is best summarised in your own words. This is the summary that worked for me. My primary source was worldpeace.org.au (about 2008) and the teachings of my life coach, Susie.

Step 1: **Define** the conflict

If defined objectively, rather than subjectively, which is how most of us do it, conflict means only this: we need a new way of doing things; the old way has failed. Pain likes companionship and fanned by passion attracts subject matter into the affray to fuel its fire. Remove the superfluous fuel from the fire. Like scoping the project, perhaps make a list of things you're not fighting about; things that can be addressed separately so that you can agree to resolve the issue of the moment.

Step 2: **Demonise** the problem and not your adversary.

It is not you against me; it is you and me against the problem. The problem is the enemy, our enemy. In a battle, even if one side does win, the first reaction of the loser is, 'I want a rematch. I will come back with meaner words, harder fists and bigger bombs. Then the enemy will learn, then they will be good and then we will have peace forever.' This is an illusion, but few can give it up. By focusing on the problem, and not the person with the problem, a climate of cooperation and not competition is enhanced.

Step 3: **Diminish.** One shared separation vs many shared concerns.

List what you have in common as well as what separates you, and not just the good stuff. Include needs and concerns. Let the resolution of what separates you strengthen your relationship.

Step 4: **Deeds.** Don't ask 'what happened?' but, "What did you do?"

A combatant's version of 'what happened' tends to be self-justifying. Better questions would be, "What are you angry about? What did you do?." These elicit facts, not opinions. Misconceptions are clarified, not prolonged.

Step 5: **Detect**. Practise active listening, not passive hearing.

Conflicts escalate when partners try to talk more than listen and then only listen as a time-out for verbal rearming. Listening well is an act of caring. If you are a good listener, you have many friends. If you are a poor listener, you have many acquaintances.

Step 6: **Domain**. Choose a place to resolve the conflict, not the battleground itself.

Armies tend to sign peace treaties far from war zones. Too many emotions are there. Some schools have peace rooms. Anyone who was fighting in the school yard, the halls, the bus is sent to the peace room at the time set. Who will be there? Mediators: classmates who have been trained in non-violent conflict resolution. principles and psychologists in schools that have peace rooms see the results in lower rates of violence.

Step 7: **Do**. Start with what's do-able.

Restoration of peace cannot be done quickly. If it took a long time for the dispute to begin, it will take time to end it. Take one small step in the right direction and give people a reason to look in the direction of peace.

Step 8: **Dismiss**. Develop forgiveness skills.

Many people are willing to say after the conflict, "I'm going to bury the hatchet." To themselves, they add, "But I'm going to mark exactly where I bury it, just in case I need to dig it up for the next fight." Forgiveness looks forward, vengeance looks backward. If you have truly decided to move on, then dismiss the conflict and accept a future where the elements of the conflict have no place.

Step 9: **Doctor**, heal thyself first.

Do these nine steps of non-violent conflict resolution always work? No. Sometimes the conflict partners are so emotionally wounded or ideologically dogmatic, that nothing can stop the violence. One absolute certainty is that the only person in the world that you have the power to change is yourself. Start there before you seek to influence others.

</Conflict resolution>

Organisational change management

It was the early nineteen nineties. As the most junior corporate IT employee I supported the local network and user group which consisted of a half dozen corporate executives and their secretaries. I didn't have my own secretary but we all helped each other out and if I needed to book travel

I generally borrowed an executive secretary. It's not that I couldn't book my own travel but they had all the contacts, corporate accounts etc. at their finger tips. In return I kept the local network running and helped out with local technical support. I travelled quite a bit for work and I could always tell if I was in the good books with the secretaries by what sort of car was waiting for me at the airport. If I was in the good books it would be a top of the range luxury sedan. If I was in the bad books it would be a poverty pack manual Toyota Starlet hatch. The joke's on them because I would rather drive a small manual than a huge automatic limousine. At the time of converting the office from WordPerfect to Microsoft Word I got to drive the Starlet. There was no doubt that the version of WordPerfect was the better product at the time but there wasn't much in it and 'open systems' was still a pipe dream. In the absence of vendor independent standards, using the same word processor as most of our business partners enabled electronic sharing of documents. To me it was a no-brainer and the battle that the proposed change generated seemed disproportionate to the subject. The blood on the walls may have been metaphoric, but the passion in the fight was real and scary. I couldn't see what the fuss was about. It took one or two more keystrokes to do certain functions but we were talking about a group of secretaries who could type at over one hundred words per minute. They were a formidable but also an intelligent group and I refused to concede defeat without hearing a logical argument. Finally, my own director's secretary pulled me aside. "Look, Robin," she said. "I am *the* WordPerfect expert. Everyone in this organisation, Australia-wide comes to me with their word processing problems because I am the expert in WordPerfect. You're taking this away from me. If we switch to Word I'll be just like everyone else." She left me standing there contemplating

perhaps the most significant project management lesson I have ever been given. The transition went quite smoothly after all the executive secretaries were given advanced training in Microsoft Word so that they could help the rest of the organisation with the transition.

Project management by our very definition of projects is about managing change. The mechanics of project management are not unlike elementary clerking. More often than not the real challenges are about helping people come to terms with a new way of working. If you only ever do one course to help you become a better project manager make it a course in organisational change management.

</Organisational change management>
</People skills>

Time estimation

There isn't a formula for estimating how long a project is going to take. I have found the established methods to be about as effective as an ashtray on a motorcycle. I'm not saying 'don't do it.' It's all you've got to go by. Ask all the players 'How long is it going to take?' Ask them about best and worst case scenarios. Calculate the project duration from the estimates then multiply by the inverse of your confidence in the estimates you've been given. In other words, add a hunk of slack time.

On the George project, after a series of technical problems, I had to report to the Chief Information Officer that the project could no longer be completed in the estimated time frame. This fellow had made a career out of being a bully. He was very good at it. I think I would have been less stressed standing in front of a firing squad. At least then the outcome would be quite certain. Not knowing what was coming next

was terrifying. When he stopped shouting he whispered in menacing low tones, "Have you included any slack time?" To my dad dishonesty was ahead of murder in crime severity and consequently I grew up with a pathological fear of being caught out lying. I blurted out, "Yes. The team had asked for a week's extension. I am asking for three weeks." I had considered two possible reactions. First, he could have security escort me out of the building minus my keys and pass. The project must finish as soon as possible. How dare I take liberties with the George resources? The coin landed in favour of the second possible reaction. He sat back in his chair. I waited for his reply, "Good, because I will not be going back to the board asking for another extension." Every time you have to report to your sponsor that there's been a delay, that information has to filter up the management tree and at every level there's someone taking the blame. Slack time is good. My advice is to include a generous slice of slack time and be honest about it. Even put it in your timeline. No one has ever been shot for finishing early, and if it's a problem you can fill in the time fine tuning, testing, training, documenting etc. but if you are an hour late it reflects poorly upon your judgement and the performance of the project teams.

</Time estimation>

Project financials

Cost estimation

The two popular ways of estimating the cost of a project are known as 'bottom up' and 'analogous.' Bottom up means tabulate all the cost estimates and add them up. Analogous means find a similar project and ask how much it costs. If you're thinking that bottom up would be the more

responsible and accurate approach then you haven't been paying attention. The problem with adding up everything you know is that you don't know what you've missed. Magnifying your error is the perception of accuracy conveyed by the numerically derived figure. If you're comparing projects, it goes without saying that 'ours will be a bit different' but if you add up the component costs then you have the total cost of your project, except that you don't. The analogous project is a real life experience which will include things going wrong, variations and most importantly, the things they forgot to plan for. If you have the opportunity, do both. The difference between your estimates should tell you how big your contingency fund should be.

See if you can include a contingency fund. Have an open and honest discussion with your sponsors about the level of confidence in the current estimates. Talk about the things that are most likely to blow out the costs. Ask them to keep money aside. If it's needed, you will still need authorisation from your sponsors to access the slush fund, but most critically, your sponsors will not need to report upstream that the project has been incorrectly costed and more money is needed. Criticism for finishing a project under-budget is less likely to be career damaging than a request for more money mid-project. Of course, spare money is perhaps best kept a secret between you and the sponsors so that stakeholders don't start adding to their wish lists prematurely.

A significant challenge that you're likely to face here is that in certain managerial environments fiscal responsibility is interpreted as 'take the cheapest option' and if your project is expected to cost more than an alternative it may not happen. If this is your current situation then skip to the section about writing business cases.

The third approach is to use a model to make an educated guess based on the numbers that you do have. With the help of the company accountant I analysed the costs associated with a number of past information technology projects. I was trying to make the case for the incorporation of support staffing into computer acquisition. I classified each cost as either 'hardware' 'software' or 'people.' The people cost included training, consulting, project management, implementation technicians, staff backfill, overtime etc. At the time, the cost breakdown was almost equal thirds. This was quite the revelation because until then IT projects in the company were costed based on hardware plus software costs. Since then, when pressed for an IT project cost estimate I've taken the cost of the machines, usually the easiest to quantify, and multiplied by three. In each case the estimate turned out to be surprisingly accurate.

</Cost estimation>

The budget

I've only got one piece of advice here: make friends with the company accountant. In order to do so, it helps to learn the basics of accounting. Consider this remedial accounting for project managers who need to talk to accountants. Step one is to understand the difference between capital and expenditure.

Capital: that which can be depreciated. For example, you buy a desk. You can claim the cost of the desk on your tax for the year, OR you can claim one fifth of the cost of the desk for each of the next five years. Whichever way you do it will depend on which serves to minimise your tax load the most, but either way, the desk is a 'capital' cost.

Expenditure: the rest. Costs like project management fees and room rental do not have a life of their own beyond the point in time when they are incurred, so you can really only claim it in that tax period.

The definitions are pretty straight forward but the lines between them get fuzzy with smaller items. Consumables like pencils, are tangible items but are considered expenditure. To confuse things further I have worked on a project where my project management fees, were 'capitalised.' In fact, the project costs were all bundled together and depreciated as a single project cost. I'm not entirely sure if that's proper or even legal, but that's the way the accountant wanted to do it.

The other thing that the accountant will need to know is when the bills are likely to come in. Just because your one hundred thousand dollar budget has been approved doesn't mean that the company has a hundred thousand dollars sitting in the bank waiting to pay your bills. Company money is generally tied up in investments and the accountant will need to know when to liquidate funds so that your bills can be paid. So your budget spreadsheet needs to take on a second dimension, time. The line items on your budget are listed down the left hand column, capital first, and below that expenditure items. Then instead of a single column for expected costs, you have a column for each month. It is not enough to tell the accountant that the new file server will cost seventy thousand dollars. You also need to specify in which month the bill is likely to arrive. If you don't know then guess and be honest about it. Take your best effort budget spreadsheet and make an appointment to see the accountant. Ask what the company reporting requirements are, i.e. what information he/she will need from you during the project. Remember that the accountant is the interface between

the theoretical numbers that have been bandied around in boardroom discussions, and the hard, real world currency needed to pay bills. Ask the accountant if s/he would be so kind as to review your budget to ensure that the information you exchange during the project is compatible. Most accountants will appreciate it if you approach them with an open mind and a budget that's close to right.

</The budget>

Accrual vs cash

With 'cash accounting' money coming in is called 'income' and money going out is called 'expenditure'. It is very simple. With the less simple but more common 'accrual accounting' money earned is called income and expenses incurred are called expenditure. Confused? The difference is in the timing. With cash accounting, the transaction is counted when the money changes hands. With accrual accounting the transaction is counted when the invoices change hands. For example, if I do a day's work on the 12th of April, the accrual accountant would consider me richer on the 12th of April. The cash accountant would not consider me richer until the money hit my account which may not be until the end of the month. I suspect that accrual accounting is more popular commercially because the transactions more closely reflect the paper trail. For example, sending an invoice is money earned. Receiving an invoice is money spent. The thing you need to watch out for is making sure you don't mix the two.

</Accural vs cash>

Paying bills

So you have an approved budget. You've made friends with the accountant with whose help you've put together

a project budget against which you will be recording costs incurred etc. but what do you do with the invoice that's landed on your desk? It's very simple. You write on it 'OK to pay.' You sign and date it. You make a record of it in your own spreadsheet, then you pass it onto the accountant. The only trick is that this simple process is agreed to with your sponsors and the company accountant well before the project commences. The point which needs to be made most clear and documented in the project charter is - who has the right to endorse a bill "ok to pay?"

</Paying bills>
</Project financials>

Office organisation

My boss made the mistake of taking some time off work and while I wasn't required to do his job in his absence I did try and maintain the physical office as best I could, a task made complex by the random nature in which things seemed to be filed. At one point in time I had a piece of paper in my hand and I had to choose between any one of fourteen places where it could logically be filed. While I had been taking care of some smaller projects, he was in the middle of a ten million dollar project to equip nine hospitals with appropriate information technology. John was a brilliant man in many ways but the office was a mess. With the help of some temp staff, I emptied the contents of every shelf and filing cabinet. Between us we invented a filing system on the spot and re-filed everything. Although I was pleased with what we'd done I was a little nervous about how well my boss would appreciate us reorganising the office to that extent without his permission. I was quite

prepared to be at his beck and call for as long as it took for him to learn the new system. I was confident I could instantly find anything he asked for and I was equally confident that he couldn't with the old (non) system. As it happens he was quite happy.

I would find a dental appointment more appealing than the subject of file administration; however over the years I've sacrificed a few weekends locating my desk under a mountain of papers. It's much easier to have a workable system from the start. Here are a couple of quick tips to get you started:

(1) Access

Things can be filed chronologically, by subject or using an index. Chronologically for things like meeting minutes that have relevance in sequence; by subject, alphabetically, for things like the budget and personnel files which are generally identified by name and do not grow significantly in number or size. If you can't file it by name and it's not part of a natural sequence, then an index can help. Create a spreadsheet with at least two columns, one for a brief description, include all the key words you can think of associated with the item, and the second for a sequence number. Arrange the items in the filing cabinet according to the sequence number. Information on tasks, issues and project variations are best stored with an index because they'll come at you in a fairly random fashion. Sometimes you'll find items are overlapping or repeated. To find any items in the filing cabinet do a search in your index spreadsheet on key words. The files you want will be located by the associated sequence numbers.

(2) Information system

A recurrent theme in my ramblings about management in general, not just project management, is to avoid the trap of letting your tools dictate how you work. Sometimes you don't have the choice and corporate policy dictates what tools you use but so many project managers that I have met see project management as creating Gantt charts and using certain project management software packages. I say remember your mission and choose tools that will help. Decide what you need to store and what information you need quick access to. Consider also using a database, simple spreadsheet, Wiki, email folder etc. but sometimes the best 'information system' is a filing cabinet.

</Office organisaiton>

</Handy skills>

Special docs

Proposal

The proposal or business case is the link between your project and the organisation's current business plan. It must be established that what you are proposing is not only appropriate but also beneficial to the organisation at large. There will be a cost/benefit analysis which presumably favours the benefit and this is what the success of your project will be measured against. As well as being good business practice, it is in your interest to clarify beyond any shred of ambiguity what benefit the project is to deliver, otherwise those who want to see the project fail will declare it as such based on their own criteria and you will be defenceless.

An endorsed proposal or business case says 'we *want* to do it.' It does not automatically mean that you are going to do it. Having established that the outcome is desirable, the mechanics of how it is going to happen and how it is going to be managed must be agreed before you start. I've watched the proceedings in the Landrover Club monthly meeting when a proposal to purchase a property was being debated. It was a brilliant concept. An opportunity to play with their toys in a safe controlled environment. A place to meet, compete and a place which could be ecologically managed, thus

saving bush trails from overuse by keen four wheel drivers. The Landrover Club is a very successful, well patronised club but property was expensive and the members at the meeting were understandably hesitant. Members on the committee preparing the proposal were frustrated because support was not one hundred percent and they weren't sure if they were wasting their time. At the time I could see what was happening but I wasn't sure how to stop it. The hesitation came from the perception that 'OK' meant that the committee could go and spend hundreds of thousands of dollars. In reality, the committee only wanted to know if there was sufficient support to continue research. The question, 'Do we want to buy a property?' would have been better articulated as 'Would the purchase of a property be in keeping with the club mission and values?' or in lay-speak, 'Is owning a property desirable and is it appropriate?' To avoid creating unnecessary obstacles to the endorsement of your proposal, make sure your sponsors know what they are agreeing to. In a formal proposal document, prefix the endorsement signature block with - 'Endorsement of this proposal will see the development of an implementation plan, the endorsement of which will see the commencement of the project.' Or words to that effect. The email equivalent might be 'if you're OK with this I'll put together a plan detailing what and who we'll need, costs etc. which I'd like to go over with you before we start.'

</Proposal>

Charter

Call it a 'Project Charter' 'Project Plan' 'Project Brief' or 'Project Statement of Work.' There are subtle differences between the definitions I'm sure, but they all have a similar structure

and I tend to use whatever the client is most comfortable with. 'Project Plan' is probably the most sensible but the name conjures images of Gantt charts and it's so much more than that. 'Charter' is the one I've used most often.

If endorsement of the proposal says that the organisation 'wants' to do it, endorsement of the charter says that the organisation is going to do it, and how. The charter quantifies the mandate issued by the sponsors to the project team. The charter must therefore detail the expected outcomes and what is required to achieve those outcomes. As a project is a delegation usually without precedent, the charter should also explain how the project will be managed including reporting, communications and performance measurement. This is known as the project management methodology or the 'project administration manual.' When the project charter is endorsed, the project moves from stage one (planning) into stage two (execution).

Think forward to the 'things have gone wrong' conversation that you have with your sponsors. Perhaps an unanticipated event has interfered with your project or you underestimated a cost or a team member is not contributing. The charter is your key to engaging the sponsors. If the unanticipated event was a known risk, then the contingency plan already exists and the only legitimate response is, 'Oh well.' If it wasn't an identified risk then the question will be raised, 'Should it have been?' Either way, you and your sponsors need to decide on corrective action and a new plan. An underestimation shouldn't be a huge deal either, if you have managed your sponsors' expectations correctly. Again, you and your sponsors need to decide on corrective action. It may well be that the sponsors decide that it's no longer worth it and halt the project. That is a risk that you take, a risk that is minimised by a well-written project charter.

Reporting that a team member's contribution is inadequate is not a judgement of their performance. Ms X is probably working on a number of projects of which yours is only one. She has other managers hassling her and you are not privy to her other tasks and priorities and you have no idea what's going on in her private life. You are simply stating the hard fact that Ms X's contribution has not been enough to satisfy the project's needs. The resource table in the endorsed charter detailed the contribution needed from Ms X. Perhaps you underestimated Ms X's role. Perhaps she needs a boot in the backside. Perhaps your project can be raised in her priorities. Perhaps you can be given an alternative resource. These are issues outside your control but not outside your sponsor's control and they will either accept a delay or offer a solution – perhaps even the one you recommend.

The charter is a project execution plan that you will use to engage the sponsors as you need them and it is the baseline against which your performance and the performance of the project will be measured. The charter is your contract with management. Regardless of what you call it and regardless of whether it is a formal document embellished with corporate logos, initialled on each page with a signature page at the end or if it's in the body of an email to which you get an 'ok' reply, the purpose of the charter must be addressed and preferably before you start. Above all, as with all project documentation, the trick is not in getting the endorsement, but in communicating your intentions with absolute and brutal clarity. Project execution will present enough challenges without having, 'But I thought...' disagreements within your own team, especially with your boss.

</Charter>

Minutes

"Who wants to take the minutes?" "Oh! Let me!" If you've just heard that you are either living in some kind of parallel universe or listening to a comedy skit. Doing documentation is like visiting the dentist. You do it because you have to and only after avoiding it for long enough for the pain to become life-threatening. This changed for me when I noticed people carrying around the project charter that I'd written for their project. They brought it to meetings and pointed to it saying, "But you said..." and my response was, "And on page twelve we tabulated the resources we would need, but don't ***yet*** have." That minuted conversation caused a flurry of activity which culminated in the required resources being made available along with a note saying, 'Anything else?' I wrote the charter because I was required to but I started to see that it wasn't just to fill the brief-cases of the sponsors when they went to important meetings. It actually worked for me. It was quite a revelation and I started looking at other documents I had to do, like minutes. If your mission is all about managing accountability, then the witnessed records of who said what at the meetings is one of your most powerful weapons.

Some minutes do's and do nots

do: 'Happy Cake' the meeting (see tools). Why are you meeting? What is the ultimate purpose of your getting together? What do you need to walk away with from the meeting? Do you need to meet? Can it be handled in an online/email discussion? Structure your agenda around your meeting purpose. Even if a regular timeslot is booked,

if there's nothing to be achieved by getting together, cancel this week's meeting.

do: 'Happy Cake' agenda items. What is the required outcome of each agenda discussion? Word your agenda items accordingly. If you're thinking of having 'Financial Report' as an agenda item, ask yourself why the financial report is on your agenda. What is the outcome required that pertains to the financial report? Does it simply need to be endorsed by the forum? Is there an item of potential controversy that needs to be resolved? What has to happen? And more importantly, what has to happen *at the meeting*? One thing that always makes me cringe is someone reading out the financial report at the meeting before asking the forum to accept it. I can read. I'm pretty sure that everyone else in the room can too. If the purpose of the meeting is to endorse the financial report then the agenda item should read 'Financial Report Endorsement.' The report should be distributed long enough before the meeting to give participants time to read it and raise objections or comments. The debate about what should go in it can happen largely by email leaving the time at the meeting to simply document the formal response to the report. Even if it is going be rejected, the implications and consequential actions can be determined in advance. Reaching the consensus will involve debate between individuals and maybe groups. If this happens at the meeting then those not directly involved with the debate are spectators. The only part of the conversation pertinent to *every* member of the forum is the consensus to which they are witnesses.

do: Ensure that each agenda item pertains to every member of the forum.

Going on from the previous 'do': If the item doesn't pertain then it belongs to another forum. Perhaps you need to create a subcommittee. The debate about whether the computer system should be depreciated over three years or five is between the accountant and the IT manager and should not involve the Human Resources Manager or the Executive Director of Medical Services. To them the only relevant thing is that the finance report is valid and is to become part of the financial plan, because this will affect every department.

don't: Record everything that's said.

Minutes need not be a transcript of the discussions had. Record only the decisions made and any actions arising. If you have structured your agenda well and done the preparation well you should be able to type up the minutes before the meeting, just don't send them. There is always the possibility that the face to face contact brings forth unanticipated issues which is a good thing. This is the reason why you meet face to face. Limiting the minutes to decisions made, actions arising and new issues identified also increases the probability of the minutes being read, increasing the effectiveness and the validity of the minutes as a communication tool as well as a record of who said what.

don't: Send out a draft or corrections to minutes.

Reflect upon your mission as project manager. Minutes are an essential tool for managing both worker and decision maker accountability. The document is the means and not the end. Sending a draft, even if it is to selected participants and then making corrections before distributing the minutes is time-consuming and while you are occupied in pursuit of clerical excellence you are distracted from your mission. Type up the minutes honestly and then distribute them immediately while the meeting is still fresh in everyone's memory

with a note saying, 'Please advise of any additions or corrections.' If you do get a reply and you have made a mistake, DO NOT send out a corrected copy of the minutes. The minutes are a record of commitments and decisions made at a particular point in time. If you create a second version, then in isolation there is nothing to say that the first is not a true and correct version of history. If the error is significant then distribute a memo or email to warn everyone but the error is officially recorded in the minutes of the next meeting. One of the admin agenda items at the beginning of each meeting along with recording participants and apologies is endorsement of the previous minutes as a true and correct record of the meeting. The minuted response to the agenda item is either 'The minutes of the meeting of <insert date here> were accepted as distributed' or 'The minutes of the meeting were accepted with the following correction…. The file containing the minutes is a chronological chain. Each link is validated by the next.

</Minutes>

Decision tables

Since keeping decision makers accountable for their decisions is central to your mission it is worth talking about the decision-making process and the documentation thereof. I'm not going to get into how to do a decision table. Enough has been written about doing decision tables. What I want to talk about is the role they play because how you tend to use them will depend on your personality type. If you haven't already, have a quick look at the section on 'The Profile of a Perfect PM.' If you haven't already, look up how to do a decision table. If you are just skimming, the gist of it

is that against your short-list of options you list the decision parameters and the 'weight' that each decision parameter contributes to the decision as a whole. You rate each option for each decision parameter and using a spreadsheet calculate the best option. Out of one hundred project managers who have just done a decision table, I would bet that ninety-nine would fit into either of two groups. Group A would be feeling particularly smug, thinking, 'We have the optimal solution' which would be a mistake. Group B would be annoyed with having wasted time on such an academic exercise thinking, 'What a load of crap. What we should have done is...' which would also be a mistake.

You cannot reduce human intuition to a simple table. Look at your team members. You cannot represent their collective wisdom on one page. Merge the two mindsets and ask yourself, does it feel right? Ask your team, does it feel right? If it doesn't then perhaps you can learn something about the decision from the outcome. Perhaps there is a decision parameter missing. Perhaps you've weighted the decision parameters according to the way that you think the world should be rather than the way it actually is. If I were to choose a motorcycle jacket I would say to myself that it is a functional item and not a fashion one. I would say to myself that looks are irrelevant and having found a jacket which is a perfect fit, has pockets in the right places and is suitably robust, I would say to myself, 'who cares if it is florescent pink and has 'I'm a Bad Girl' embossed on the back?' Apparently I do. My ego says that I am not a fashion victim but I am, perhaps not to the same extent as those I scorn for their weakness but I am not immune.

So if you go back and change your table because you weren't happy with the outcome, is that cheating? Some

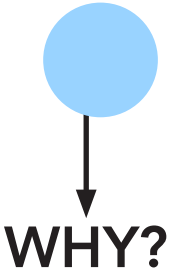
would say 'yes' but it's all in the wording. If you present the table as the mechanism by which you made the decision then you would be lying. On the other hand, if you use the table to illustrate how the decision was made then you would be telling the truth. It just so happens that the decision table taught you a bit about yourself and the environment in which the decision was made as well.

</Decision tables>

</Special docs>

Tools of the trade

Happy cake analysis method

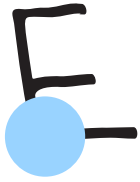


This is not one you'll find in any text book. It was born in the classroom while I was trying to explain 'mission' to a group of students. The mechanics are quite simple. Draw a circle in the centre of the page. In the circle name your task, project or activity. Draw an arrow coming down from the circle. Let the arrow point to a statement which reflects the ultimate outcome for which the task was born. Ask yourself: Why am I doing this task? Consider your answer then ask yourself 'why?' of your answer. Is there an even greater cause?

When I did this the first time in the classroom the example project was to bake a cake. In the centre of the whiteboard I drew a big circle and wrote 'cake' in it. I drew an arrow under the bottom of the circle and invited the cake bakers in the room to reflect upon their cake baking experiences and tell me why they had baked their most recent cake. The first answer I got was, "For my husband." I wrote it under the arrow. I reiterated what I had told them earlier: "When you have identified your ultimate purpose, it should tell you what actions, in this case ingredients, are appropriate." I drew

an arrow leading into the cake from above and above that wrote 'rat poison.' There were nervous giggles all round. Before the day's training session had begun, as people were arriving and introducing themselves, enjoying tea or coffee, I distinctly recall hearing amongst the small talk, "Cheaper than a divorce." This is a true story. "Not that cake?" I asked. While they were re-thinking their cake baking mission I proposed another ingredient, a file. If he was in prison, he could use the file to break out. I challenged them, clearly 'for my husband' is not wrong but perhaps there is a higher purpose for baking the cake? Perhaps one that eliminates poison? The next proposal was 'For his birthday.' This was an improvement because it immediately suggested when it had to be ready by and that candles might be appropriate but it didn't eliminate rat poison or the file. Ask yourself why of the 'why' until there is no greater purpose behind baking the cake. After several iterations we agreed that the ultimate purpose behind baking the cake was to make her husband happy on his birthday. The young woman whose partnership had been scrutinised during this exercise got her revenge. For the remainder of the two day course, every time I challenged participants to reflect upon the purpose behind an activity she said, "Happy Cake it." Attempts to give the exercise a more dignified title were swamped and the name stuck. Want to add focus to your meeting agenda items? Happy Cake them.

</Happy case analysis method>



Mind maps

I'm not about to tell you how to do a mind map. Plenty has been written about how to draw

mind maps. This is just a plug for mind maps. For those who haven't used a mind map I would encourage you to look up how to do one. For now, it is a network diagram similar in principle to a work breakdown structure. In fact, a work breakdown structure is like a simple mind map of your project activities.

The reason mind maps work is because we tend to organise ourselves with lists like shopping lists, to-do lists etc. and while some people are better at it than others, in general, the human memory is not very good at processing lists. Human memories seem to be stored in clusters linked by proximity. Lost your car keys? If you can remember the last time you had them, you'll recall what you were doing. You may recall what was on the radio or who you were talking to on the phone. Memories are not just linked in sequence but to everything else that was happening at the time. Mind maps allow you to link your information in the same way. I use mind maps to design documents; everything from books to reports, sometimes even letters. Because you can see the relationship between topics it's easier to avoid repeating yourself and if you suddenly remember a subtopic that needs to be included you can literally see where it belongs or how it can be incorporated.

My other use for mind maps is to summarise. In preparation for exams I used to summarise the topic in a mind map. By then it's too late to learn detail, but understanding the relationships between the details allows you to use the element of detail most appropriate to your needs. Also, if you are giving a presentation and your notes are in list form and you are distracted or are taken on a tangent, getting back on topic can be difficult. A list is like a chain; if it's broken the integrity of your presentation becomes unstable. If you're

looking at a mind map of your topic you can see at a glance how the tangential topic might fit in and how to segue to and from it. Mind maps allow you to converse with your audience about the topics in a much more natural and engaging way while still ensuring that you leave nothing out.

</Mind maps>

Electronic project modelling

There is a plethora of project modelling software applications on the market from freeware through to commercial applications worth tens of thousands of dollars per licence. To date, Microsoft Project™ has been the most common. I've incorporated 'How to use Microsoft Project' in my teachings for two reasons. Firstly, there is an industry expectation that you know how to use it. There is a risk that prospective employers might dismiss a candidate if they do not know how to use Microsoft Project. They can't be good project managers if they don't get the job in the first place. Secondly, learning how to use the software teaches students about associating resources with tasks, Gantt charts, tracking and other basic project mathematics. However, I discourage students from using project modelling software on actual projects. The value of any predictions that you can deduce from your model depends on the information you put into your model. Put rubbish in and you get rubbish out. I'm sure you've heard that before but it's more complicated than that. The accuracy of data extrapolated from any model is a function of the accuracy of the data you put in and also the accumulation of error margins. Gantt charts got a bit of a hammering under the heading of 'The Problem with How it's Taught.' The data item causing consternation was a task

estimate which was: one day plus or minus three months. If that single data item makes you somewhat apprehensive about the value of the model and the end date that it might predict, consider that it was one of a thousand tasks represented in the model, every one of which has a 'plus or minus' error margin. You don't need a degree in statistical analysis to appreciate that if you follow the model to the project conclusion, the accumulated error is going to overshadow the conclusion like Mount Everest overshadows a speed bump.

Giving someone a power saw does not make them a carpenter. Feeding data into a computer model does not make you a project manager.

</Electronic project modelling>

</Tools of the trade>

War stories

My 'wisdom' (?) stems from my experience so this publication would be incomplete without some of the war stories from which they were born. In some cases I've changed names to protect the guilty from unnecessary embarrassment – and me from being sued.

Murdock

My bags were packed. My flights to Victoria were booked but instead of heading for the airport I was on my way to a local Perth hospital where the entire IT department had resigned and walked out.

I had been preparing several Victorian hospitals for transition to a new patient management system, from Perth. There had been some arguments but now we were in the home straight. I did not foresee any challenges but given their past project experiences my nervous corporate office superiors were keen to be represented on site and who was I to complain? I quite enjoy the experiences of travel, especially when someone else is paying the bills, so I was less than happy about the change in plans. What does an IT manager do anyway?

By this stage in my career my hands-on support skills were a bit out of date. For most of my professional career I had been involved with projects, so I wasn't exactly sure what I was supposed to do when I got there. I felt sure that the only reason I was sent was because there was no one else. One thing that I was quite sure of was that those projects happening on site would have to be put on hold until replacement support staff could be recruited. That would have to happen quickly so that clinical staff involved with the projects could be advised and the integrity of the projects could be preserved for a later restart. If the projects were allowed to grind to a halt, then regenerating the necessary enthusiasm and momentum would be very difficult even with a full complement of support staff. On the grounds that I was directed there by the Head Office and not the local administration I prepared a memo addressed to the hospital CEO. All the hospital chief administrators called themselves 'CEOs.' The intention was to announce my presence and to tabulate the information technology activities that I would support, and which would cease until a new IT team could be recruited. I was a little angry at being taken away from my own projects in Victoria and quite a bit of my anger was directed at the hospital CEO who was credited as the cause of the walk out. However, I remained 'professional' which to me meant staying focused on what was necessary and what was urgent. I may, however, have been somewhat less than diplomatic in my choice of words.

Apparently my memo was sufficiently offensive for the CEO to reply directly to my superiors in the Corporate Office expressing his displeasure at the lack of respect for his position expressed in my memo. Unfortunately for him, escalation to corporate office brought his behaviour to the

attention of the governing board and ultimately led to the appointment of a new hospital CEO. Looking back I'm pretty sure that the Chief Information Officer (my boss) would have known exactly how I was going to respond in that situation which gives me mixed feelings. On one hand, he used me as a battering ram. On the other hand, he defended me against the word of a CEO to the very end.

</Murdock>

The George project

I learned two things from the George project: how to manage projects and that I didn't want to be a project manager any more. The signs were there at the start but my home life was recovering from a bit of a train wreck. Although well on the road to recovery the debris was still smouldering and I figured that if I wasn't having fun I might as well be making money. How bad could it be?

The good news was that the corporate office where I would be based was walking distance from home and that unfortunately was pretty much the extent of the good news. The job was technically quite complex and the centre of a fierce political battle. They chose hardware against the advice of the software vendor and their own software support teams. They bought an unproven machine, the first of its kind in the country. The project had become the centre piece of a corporate amalgamation which was meeting with the kind of resistance not seen since the Boston Tea Party.

It was like boarding the Hindenburg and lighting a fat cigar with a faulty zippo.

In the middle of the project, as if we weren't having enough fun, one of America's military protegés turned on its former

master and levelled the New York World Trade Centre killing thousands and sending secure facilities around the world, including data centres, like the one housing the project's main computers, into lock-down.

The attack on New York's World Trade Centre was one of those events that's etched in my memory and probably yours. I watched in horror as the news of the attacks unfolded and I started to contemplate the consequences to our global society. Of course, what I should have been contemplating was the consequences to the project. The new servers were housed in an outsourced facility which also housed computers for banks, governments and other big businesses which until this point in time, had been put forward as evidence of their competence and security. If the banks trust them... The severity of the attacks in the U.S.A. made all big businesses understandably nervous and the facility managers did the responsible thing and locked down the data centre. Suddenly neither our software vendors, hardware vendors or even George's staff had the security clearances to enter the outsourced facility and although they had been coming and going for weeks they were now locked out. The implications of the delay were twofold; the first being cost. Projects have an 'idle cost.' That's the cost of existing with nothing happening. Add up the cost of the consultants, their rooms and facilities, all the staff who had been seconded to the project, backfill, lost business etc. etc. and my conservative guestimate of the idle cost of this project was $15,000 per day. Of course, in this type of situation, cost pales into insignificance compared to the reputation of the Chief Information Officer who now has to front the board and explain why the project is to be delayed, again and potentially by several weeks.

Lesson #1: Be careful what you ask for – Part 1. A topic I favour as a core project management skill is interviewing techniques and this is why: I once asked the question, "Who's the project sponsor?" I was given the name of the Divisional General Manager. I was pleased. To have such a senior person on my side makes for quicker resolution of problems. Unfortunately, 'sponsor' is just a title. The real information that I required was 'who's driving?' In other words, who is going to benefit or suffer the most from the outcome of this project and who's paying the bills? Regardless of who is nominated as the sponsor, this is the person or group you must ultimately satisfy. This would be your real sponsor and in my case, clearly it was not the Divisional General Manager. In this case, the Divisional General Manager was the most senior client of the system but he didn't initiate the project. In fact, he was being forced to accept the change, which he didn't agree with. The project was a corporate office initiative to bring the division in question in line with corporate information technology strategies. The project was being driven by the Chief Information Officer.

Having a nominated project sponsor who would prefer to see the project fail is clearly a sub-optimal situation. With the wisdom of hindsight it should have been obvious. At the end of the project, assuming it succeeded, the status quo for the Divisional General Manager would not have changed much at all. The change was to the underlying technology infrastructure. Perhaps there'd be a different phone number to call for support but there would be no significant change to his world. Come to think of it, the Divisional General Manager was quite reserved and a little difficult to engage at the start of the project. The Chief Information Officer on the other hand, was shouting at me quite a bit. It's obvious now

but for the first half of the project, when I thought I was confiding in my sponsor I was actually informing the opposition.

Lesson #2: Be careful what you ask for – Part 2. I guess this one's my own fault for not staying hip with the latest business technology terminology. I got caught unawares, a bit like when 'systems support' became 'facilities management' a term which until then I had associated with catering. Quite early on in the George project I could see that getting the system users onside would be one of the big challenges. I asked for a 'Change Manager.' I was presented with a resume. "I believe this person would make an excellent Change Manager." Enter a young woman who I will call 'Linda.' Linda was appointed and given the title 'Change Manager'; however the role she was expected to perform was that of divisional IT Manager and not Project Change Manager. Now the implementation team had to answer to an inexperienced lamb ill-equipped to deal with the challenges before her. She was instantly despised by the technical team who saw her as yet another link in the unnecessary chain interfering with their work and a shining example of 'COI' (Corporate Office Incompetence). Nowadays I set up a 'Workplace Readiness' team. 'Change Management' could be confused with project variation management and apparently also IT management.

Lesson #3: Don't blame the tool. In this case I do, but I won't in future. This is perhaps the most valuable project management lesson I have learned. The concept of modelling is to extrapolate from the information you have; new and valuable information like when individual tasks, and even the whole project, must start and finish. To save you time and because the real world is so complex, project modelling tools like Microsoft Project make some sensible assumptions,

like one person cannot be in two places at once, and if you put someone on two tasks at once, the modelling software adjusts the timeline accordingly. Microsoft Project does not know that the involvement with each task does not require one hundred percent of the resource's time unless you tell it so, or you tell it to ignore 'resource levelling.' Although I did spend a lot of time dutifully feeding information into Microsoft Project, I did neither. I incorporated the Gantt chart that it produced into my project charter. I did not notice that the minor updates generated an automatically adjusted timeline, in particular the end date had changed. The Chief Information Officer noticed almost immediately and very immediately called the project manager. It was eleven o'clock in the evening. It was not a pleasant conversation. The conversation continued in the morning, in person and it included the owner (and General Manager) of the firm through which I was engaged who was summoned to emphasise the importance of the project and to witness the project manager being berated. In the ensuing conversation with my boss I was banned from using Microsoft Project. This was quite confronting to me because until now, I had felt that the use of Microsoft Project defined my role as project manager. He insisted that if I wanted to draw a Gantt chart I should do so manually using a table in the word processor. I've since gone back to using Microsoft Project, but only as a reporting tool and not as a modelling or planning tool. I figured that I paid for it and it does draw pretty charts that are easily imported into word processing documents. The lesson was that the effort required to model the project in Microsoft Project was more than a full time job, and omission of the tiniest detail could render the information derived from that model worthless. Most importantly,

feeding information into the model does not contribute significantly to your mission as project manager. While you're playing with rubbery numbers derived from verbal estimates you're not listening for issues, watching progress or keeping stakeholders informed and engaged. You lose the ability to actually respond to issues and you effectively lose control of the project. Remember what you are there for. Use whatever tools help you in support of your mission. Do not let the tools dictate what you do.

Lesson #4: How not to motivate your team. This is not a lesson I had to learn but I joined the project too late to stop it. It's worth mentioning because it helps to highlight the importance of people management skills to project management.

In an attempt to placate the hostile regional IT staff, the corporate office offered a $10,000 bonus to key IT staff in an attempt to buy their commitment to the project. It doesn't take a Master's in Business Administration to recognise this as a bad idea. Like it or not IT staff earn quite a bit of money so to them $10,000 was hardly a life-changing figure, not to mention it was insulting considering that they were expected to work on a project that they considered dangerously irresponsible. Unfortunately, I didn't find out about this until it was too late or I would have done my best to stop it and put the money in a project slush fund. I'm not saying I wouldn't have bought myself a dinner or two but mostly it would have been spent on the staff during the project. For example, during technically critical stages of the project, key personnel from Sydney and Perth were expected to spend up to two weeks at a time in Melbourne, away from their families. Although there was no scheduled work in the middle weekend of the two week trip, it was not practical

to send the team home. Perth was a five hour flight away; there were too many days lost; and if something went wrong … it was just sensible to have them in town. Imagine if the members of the team were told, "You can't go home for the weekend, but how about bringing your family over instead? We'll pay their airfares and put you all up in a fancy hotel in the middle of town."

Until now their expertise counted for something in the organisation but now they are being bribed to shut up, do as they're told and ignore their professional instincts. It's like a good cop accepting a bribe to let a rapist go free. On the other hand 'bring your family over' says that despite our differences you are important. We value you and your family. Which approach is most likely to solicit a positive contribution? I'm pretty sure that airfares and weekend accommodation for a spouse and two children would leave enough change out of ten thousand dollars to buy the project manager some champagne to go with the lobster dinner.

Lesson #5 Judge not... Most popular religions censure the judgement of others but we in the Western world are culturally predisposed to judge. The primary source of gratification central to our most popular leisure activity is watching the baddie get blown to smithereens in the conclusion of a movie, the first three quarters of which sets out to justify the violence. The dude was totally evil. He may have been one of God's creations but God obviously made a mistake with this one and we need to correct it. Boom!

Although I try I am not immune. I judged the antagonists to be big fish in a small pond whose egos were dented when they joined the bigger pond. Right or wrong that was not the problem. Although I'm a lapsed geek (I have a degree in Computer Science), I still have enough technology

smarts to recognise, eventually, that the technical support staff, the hub of antagonism, were very good at their jobs. Like George, George's competition had been forced to change computer hardware platforms because the original and recommended hardware vendor had ceased to exist. So critical is this application to the business at hand that they had contracted the software vendor to assist with the data conversion and transfer to the new servers. Their system was offline for 48 hours and they lost 24 hours' worth of data. Unlike this transfer where the machines were next to one another, ours were almost one thousand kilometres apart. Using a modern DSL Internet connection it would be possible to transfer the data in approximately one week. Using the technology of the day, an over-the-wire data transfer would have taken approximately one hundred and forty-five days. Unlike our competitions's transfer we also had to consolidate software versions and modifications, of which there were approximately one thousand, from three different sites. Despite all of this the George team planned and executed a conversion that had the system off-line for only 12 hours and did not lose any data. They were very clever technicians.

At the same time the corporate strategy of consolidation of servers and the separation of the support teams into facilities management and a separate business focused application team seemed like a sensible, tried and proven formula so, if everyone was doing good stuff, why the agro? It's true that the provincials didn't like having their authority diluted but many of the corporate staff behind the project had been promoted beyond their areas of competency and were no match for slick talking salespeople or the corporate bullies who they were keen to please. Such fun.

Lesson #6: Knowing when to run away. I talk about the George project like Vietnam vets talk about the war. I had to cancel my tonsil removal surgery because I could not take leave to go to hospital. I took the contract with the proviso that I would have several days off to attend my step-daughter's wedding on the other side of the country, but when the time came it took the owner and managing director of Clarity Consulting to create the space for me to escape. I lived and worked on opposite sides of a large park close to the centre of Melbourne. For the winter months I did not see the park in daylight. I was walking to work at six-thirty in the morning and walking home sometime between nine in the evening and three in the morning. For the first couple of nights I walked around the park but by the third night it occurred to me that, compared to a day in the office, getting mugged would be a pleasant social encounter.

It was a battle that taught me a lot about myself as well as project management. In that regard it was a good experience but a stressful one. As a project manager, you know you're doing it right when everyone else is stressed and you're not but that was a lesson I was still learning on the George project and there were other stress factors which were still dissipating.

Prior to taking on the George project, within the space of eighteen months I had moved house six times. Three of those times were interstate. I had broken up with the only long term partner I ever had. I had changed jobs twice. I'd sold my house and bought two others (one for my parents). I helped to take care of my brother who had been involved in a serious motorcycle accident. Then I discovered that the person I had started dating was known to the police and possibly a psychopath, and then I caught a cold. The stresses

of the George project were a pleasant distraction at first but by the end, even though I finally felt as though I was holding the reins and not the tail, I had definitely had enough.

The corporate office had bought computers contrary to the advice of the technical support team and the software vendors. The decision led to some senior level dismissals. For the record, this is not what I do for fun. The decision was made to switch vendors again. A demand came to the project office for specifications for alternative machines. In response to, "We'll need a couple of days" I was told that the vendor would be chosen today and that I could be a part of it or I could 'go away' although not in exactly those words. I handed over the files from the original analysis into machine alternatives. I stipulated as loudly as I could to everyone who would listen that this information was two years old. This may be enough information to choose a platform but not enough to place an order. Before placing an order you must consult the technical support team and the software vendor.

The lull in activity while decisions were made on high lasted three weeks after which I heard on the grapevine that it had been announced at one of the regional offices that the corporate infrastructure team had ordered new machines. They would arrive in three weeks time and the project would conclude in June. I was angry. Angry is not a good disposition for a project manager. I had no business being angry. I remembered the words of my boss, "If they were competent, capable, organised people they wouldn't need us" but I was also tired. I wanted to work *with* people and if they hadn't realized by then that I was on their side they could re-do the project with someone else. I didn't need the money that badly. The only thing I feel bad about is that the

George executives did not accept the replacement project manager offered by Clarity Consulting.

</The George project>

Patience & patients – SJOG Geelong vs Ballarat

This is a tale of two hospitals which underwent a significant project to replace their electronic patient management systems. Both hospitals belonged to the same parent organisation. Both hospitals were adopting the same system, similar projects managed in a similar way. While the ultimate outcome was the same, the journey there for one was plain sailing. For the other, it was a cat fight to the death.

Overseeing these two projects from an office four thousand kilometres away presented its own challenges. There was a lot of time spent on the phone. There was a lot of kicking and screaming metaphorically speaking, until the first hospital 'went live' with their new system, and then all the phone calls stopped. When I called it sounded like business as usual. However project management has made me just a bit neurotic. Three days after the new system was supposed to be in operation, I travelled to Geelong to visit. 'Significant project...' I forget what excuse I used. My first question as I arrived was - Can you print an invoice? A private hospital's viability depends on being able to invoice patients as they leave. The answer was 'No.' I went into panic mode demanding to see the on-site vendor representative but my distress was promptly dismissed. "You should expect a few glitches and we have manual systems in place." It was like being in the twilight zone. The locals who had fought the corporate decision were now defending the vendor. I was told with

almost polite disinterest, "The vendor is working on it and we expect to be able to print an invoice by Tuesday."

Staff at the second hospital were losing a system which was specifically developed for them, albeit many years ago. They were less forgiving. Technically the installation went fine but at eleven o'clock at night, four hours after the system was supposed to be 'live' and supporting the hospital, the hospital's CEO received a phone call declaring that the project had been a failure because they couldn't print a receipt. Naturally if the CEO is dragged out of bed, guess who got the next call?

The patient management system is to a hospital what the nervous system is to the human body. Who's in what bed is linked to bed allocation, obviously, but also billing, meals, nursing, cleaning, theatre allocation etc. It goes without saying then that replacing the patient management system is a somewhat traumatic disturbance to the daily operation of the organisation. When the decision is a corporate office imposition, it's not only traumatic but also unpopular. To make matters worse, it's an all-or-nothing decision. The answer to the question 'can the computer do...' is always 'yes.' The catch is that customisation beyond the parameters that the original programmers thought of can be prohibitively expensive and time-consuming. In short, you can't keep the good bits from the old system and only adopt the advantages that the new system offers so there's bound to be some functionality that gets worse.

The finance director of the Geelong hospital engaged the services of a counsellor to help explain the decision to the rank and file. Basically, if all hospitals in the group use the same software, they can help support each other and save heaps on licensing and maintenance costs. At the

first hospital they recognised that at least one department would actually be worse off with the incoming system. This was acknowledged by the hospital senior management who allocated additional resources to that particular department. The voices of dissent were heard, acknowledged and contributed to the ultimate outcome in a positive way.

The second hospital's management team deemed such counselling to be unnecessary.

Since then I've spent a bit of time learning the basics of organisational change management and have incorporated it into my project management. When it comes to information technology projects in particular, research and development projects are different but implementation is like playing with Lego blocks. Sometimes it's complicated but basically the bits fit together. The real challenge is managing all the associated personal traumas that the change introduces. Do that bit well and the work force will cover for a myriad of your sins. Do it poorly and they'll crucify you for not being able to play solitaire on the computers when it's quiet. (Yes, it happened). If you want to be a more effective project manager do some extra training in organisational change management.

</Patience & patients - SJOG Geelong vs Ballarat>

SHIS

A mentor and wise project manager once told me to give your project a name because if you don't, someone else will. 'SHIS' is a case in point. It got called a few other things during the course of the project. SHIS actually stood for 'Small Hospital Information System.' It got its name because it was a sister project to the 'Large Hospital Information System'

project (LHIS). The latter was focused on the larger hospitals in the group and was to address all aspects of information technology including supply systems, finance systems, human resource systems and of course, patient management. Basically it was a big project. The smaller hospitals in the group had a simpler but more urgent need for a new patient management system and thus the SHIS project was born. The theory was that a few years down the track the LHIS and the SHIS projects would merge and use the same patient management system. Provided the SHIS project honoured its brief to use modern scalable technology, then should the LHIS solution prove to be less than optimal, the SHIS could take over and become the corporate standard patient management system. At least they didn't call it the 'PMS' project. In any case, it was a very clever two pronged attack on a problem which addressed the urgent needs of the smaller hospitals leaving the LHIS project to come up with the 'ultimate' solution.

At the helm of the LHIS project was a man called John Southern. He was the Group Information Technology Manager. In modern speak he was the Chief Information Officer. He was my immediate supervisor and a legend. I learned more from him than I could fit in a book and I am eternally indebted to him for the opportunities and support that he gave me. In the early nineteen nineties the use of computers in healthcare was minimal, ad-hoc and often poorly integrated. At the time two hospitals regularly in the news for their leading edge use of information technology were St. Vincent's Hospital and Sydney Adventist Hospital. For less money than they spent on their individual hospitals John delivered to nine hospitals across three states a networked, integrated solution. The magic was his capacity to work with and develop people.

Meanwhile, the SHIS project was entrusted to the vendor. It was not going so smoothly. It was already running late, had yet to service a single hospital and of their sixty thousand dollar budget they had spent a little over one million. I love this example because it helps to justify project management fees. My brief was simple. 'Sort it out. Just tell us how to fix it.'

It didn't take long. The core technology seemed sound but the solution had been inadequately researched and the system could not accommodate the (admittedly bizarre) Victorian state legislation. My recommendation was to kill it. While it was definitely fixable, we didn't have the resources in-house to fix it and the vendor was questionably competent and morally bankrupt. Unfortunately, my presentation to the Council of Chief Executives quickly degenerated into an outtake from a Carry On movie. To emphasise the absurdity of re-entering a development cycle with the vendor from hell I exploited the project financial position using figures that our big boss had not as yet shared with the other members of the council. The board room was still ablaze with activity when he left the room. I was sitting in 'Oh my God' silence when I felt my supervisor's hand on my shoulder. "Don't let him reach his office." is all he said. I ran down the corridor until I was alongside my director. "You hadn't told them had you?" He had every reason to be angry. "No," he said quietly. By then we had reached his office. As he opened the door he looked at me and smiled, "But it's about time they knew."

Back then, although I would probably have been able to quote the dictionary definition of project terms like 'sponsor' the practical application of that knowledge in the workplace was still ahead of me. I should have known that as the project sponsor, it was his baby. Not only did I embarrass him but

I did so while sinking his pet project in front of his peers. Not even the wisdom of hindsight would have changed my recommendation or my resolve; however, I would handle it very differently now. In case it's not obvious, I am humbly acknowledging that I worked for an extraordinary bunch of people who were able to see value in me despite my political incompetence, otherwise my career would have ended there.

</SHIS>

PACS

I don't know how they came up with 'Picture Archiving and Communication System.' What PACS really means is X-Rays online. X-rays online is a good idea. It's the only project that I've ever worked on where there didn't seem to be a down side. No one didn't want this system. For the greenie in all of us, it means that fifty thousand litres of toxic environmentally unfriendly chemicals per year used for the development of x-ray film are no longer needed. The expensive real estate needed to store the mandatory seven years of historical film could begin to be scaled back. Pre PACS, every single one of the forty-two interns would spend between forty minutes and four hours per day, every day collecting and collating x-rays for the surgeons. Not only did that represent a significant cost, but think of all the doctor-hours that could now be given back to patient care. There were flow-on benefits also. Staff rosters had to be separated by ten hours. Pre PACS interns worked such long hours that this was often difficult. And then of course there were cost savings. The radiology department of Bayside Health produced in the order of three hundred thousand x-ray studies per year, at a film development cost of $2.70 per page.

Bayside Health is a division of the Victorian public healthcare system incorporating several Melbourne-based hospitals including The Alfred, which was the main trauma centre for the state. Bayside Health had chosen a vendor but just before they began the actual implementation they decided they needed a new project manager.

Looking at the project files, it would seem that my predecessor was very articulate, meticulous and well-organised. It was somewhat intimidating and I wondered why they didn't like him. He had stayed long enough to give me a handover during which he seemed both personable and professional. In the past I had taken over projects which had not been well run which in part helped to define my role. I knew what I was there for. If the project was suffering, then so were the clients and they generally welcomed me with open arms. It's not that Bayside Health didn't welcome me with open arms, it's just that I wasn't sure what I was doing there. Looking back I can see now that my predecessor and I made a good team. His meticulous attention to detail had led to an excellent communications network and project documentation. He was a good project manager in the traditional sense of the word but what they needed now was less bureaucracy and more action which meant taking risks, which is generally bad project management. I decided that I would do it my way and not try to walk in my predecessor's shoes. I sat down with the then Chief Information Officer and put forward my intentions, for example, not maintaining the documentation quite as rigorously as my predecessor. She leaned across the table as if she had something intimate to share. "Robin, I know that you have a different style." she said. "That's why we hired you." I still wasn't sure if that was a good thing or not but I decided to proceed on the basis that it was good.

Bayside Health PACS project was a spectacular and heart warming success for which I shouldn't claim full credit, although I regularly do. They were well on the path to success when I joined the team. They had studied a similar implementation interstate which had gone well but was not delivering the benefits as expected. Twelve months after that system was commissioned they were still printing one hundred percent of their x-ray film, the only difference was that instead of costing $2.70 from the developer, they were now costing $5 each from the laser printer. They had gone backwards. According to their business case for PACS, Bayside Health expected to cut production of film by ninety-three percent within the first three years.

Bayside Health cut production of film by ninety-three percent within one month of the PACS being officially commissioned. The difference had little to do with project management in the traditional sense of project management. I've stood in the emergency department while they wheeled the accident victims off the heli-pad. There was running and screaming. They had the 'red team' and the 'blue team.' I saw a stream of blood shoot up the wall next to a patient. You may consider project management stressful, but it was nothing compared to this environment. This was a well organised, finely tuned extreme pressure environment. It would take a very brave and very stupid project manager to stand in the middle of that lot and tell them how to do their jobs.

When you took them away from the Emergency Department floor into a cosy boardroom looking at a presentation slide show they were all in agreement. PACs made good sense. No need to wait for the x-rays to make their way from Radiology to the radiologist and then to the Emergency Department. As soon as they were taken the attending

doctor could view them, even while the radiologist was still writing the official report. Fantastic!

The problem is that back in the work place, under pressure, people revert back to what they are familiar with. In this environment, the dip in the productivity curve brought on by new procedures could mean that someone could die. Although the scale of data being moved around the hospital was pretty huge, the technology was not that different from looking at pictures on the Internet. In fact, the user interface to the PACS was a browser. There were some clever programming modifications to the patient management system to include 'view x-ray' buttons which would then launch the PACS system making it look like an integrated system; however, despite the scale the project was not technically complex. The actual challenge was getting doctors who until now had held x-ray film to the light boxes, to login and view them on a computer screen.

The hospital's training department presented me with another challenge. I was warned that 'doctors don't go to training' and yet it was a requirement of the project to provide training for all the clinical staff. We established a small group of people which included computer people, training people and a doctor who had come to work in the Information Technology department to spearhead what we called the 'workplace readiness team.' This is the group who should take credit for the profitability of the project. Together we devised and executed a reasonably sophisticated and carefully timed marketing plan which would generate interest and teach clinical staff how to use the PACS.

We set up a training room with twenty networked workstations and hired a trainer, knowing that no one would show up to the scheduled training. Instead, training happened by stealth. At each medical conference a PACS implementation

team member would give a five minute 'presentation.' Each doctor was given an interactive DVD to take home. With this they could get a feel for how the system would work in the privacy of their own homes without suffering patronising instruction from someone who wasn't even a doctor. Since the general use of the system involved looking at pictures and not editing or generating them, the system was made available in 'test mode' long before the official launch.

The official launch was a media event staged on behalf of the attending Minister for Health and her film crew. In practice, the hospital staff had been using the system for the past month. Getting the images on screen wasn't difficult. After seeing one or two 'demonstrations' and having a fiddle with the provided DVD, the average doctor was soon viewing x-rays online. It was much more convenient than waiting for the film. The 'go live' date was all about cutting production of film which was easy because by then everyone was already using the PACS.

Reaching the targeted adoption of on-line x-rays three years ahead of schedule was worth millions of dollars to Bayside Health. The implementation logistics required some coordination of course, and the technical support for the project from both within Bayside Health and the vendor was excellent but the payload for the project was delivered by the Workplace Readiness Team and their organisational change management strategy.

</PACS>

DefSIN

My first solo flight as a project manager was for the Australian Defence Security Branch. They called me 'Assistant Director Security – Management Information Systems' which

made my recently graduated head swell. I impressed the interview panel with my knowledge of seven project management phases. I knew they were using the 'Spectrum' project management methodology and I had done a bit of homework. The task at hand was to finish the 'Security Information Records System' or 'SIRS,' a small database application for personnel security clearance data. At the time I didn't really understand what the word 'methodology' meant at all. I had no idea what to do with the mountain of documentation I was confronted with, especially since it all pointed to a tiny single user PC database which, despite all the appropriate 'user sign-offs' was universally hated by all who used it.

At first I resisted the temptation to replace the system. Fixing someone else's problem software is nowhere near as much fun as writing your own. However, I needed to do the fiscally responsible thing for my employer. I know now that when I ultimately came to the conclusion to throw out the existing system the users of the system in the department breathed a sigh of relief.

Page one of the 'systems analysis and design' manual is all about meeting the 'users' and writing specifications. Getting them in a room wasn't as difficult as I thought but getting them to talk was apparently impossible! It was as though they were expecting me to tell them what my new system would be like. According to the manual they were supposed to tell me what they needed with maybe a few 'wants' thrown in but I got nothing. Partly because I just didn't know what else to do, I parked myself in the closest regional security office and watched them work for a few days. Not only did I learn a lot about the business of personnel vetting but they started to talk to me. It was the beginning of a good working relationship.

I was advised that given the unpopularity of the old system the new system had better have a new name. The new system was a networked multi-user database application. They wouldn't let me call it 'SIN' ('Security Information Network') so it became 'DefSIN.'

I did more than manage the development of DefSIN. I was effectively an IT department of one. Although the department seconded for me some brilliant technical support to help with networking issues and implementation logistics, the product was effectively designed and built and implemented by yours truly. Professionally speaking it was a unique and fantastic opportunity in that I got to experience the complete lifecycle of both the system and the project. Usually you're just a cog in a much bigger system. It was the ultimate learning experience and heralded as a success pivotal to the successful creation of the world first 'Consolidated Vetting Unit' which saw the army, navy, air force and civilian public servants vetted by one unit. The reason this was such a big deal is that traditionally Army hates Navy, Navy hates Air Force and they all hate civilians, so it was quite an achievement but it wasn't really me. While DefSIN helped, the woman who ran the regional vetting cell did so with an iron fist and a heart of gold. With her in charge consolidated vetting worked. The day she left things went downhill rapidly.

The DefSIN project highlights project susceptibility to political environmental factors. While the public sector is known for putting bureaucratic obstacles in your path, it can just as easily fast-track. I got the job in the Defence Security Branch almost the day that Sadaam Hussein's forces invaded Kuwait . Defence Security suddenly had a very high public profile. The initial purchase of computers and tools involved

me pointing to things in catalogues. They just seemed to arrive. Two years later the Russian empire dissolved and who needs a Defence Security Branch anyway? My budget was reduced to zero. Luckily by then, although still missing some functionality, the system was already in place and performing its primary functions. The point is that there is a question. Had the political winds changed six months earlier, would my project have succeeded?

DefSIN was a fabulous boost to my ego. It served me one of the greatest complements never actually given. Having practised the installation in the local Canberra office, the implementation team, being me and one assistant, moved to Sydney. At lunchtime on day two, the local boss asked, 'How's it going?'

"It is, to all intents and purposes, fully operational now," I told him. "We've done an initial data conversion. After lunch we'll use that for the training sessions and this evening we'll do a second data conversion to clean up after the training sessions and it'll be all yours by tomorrow." Apparently he misunderstood my instructions and when we got back from lunch everyone was sitting at the new terminals clicking away and using the system as though it had been there for years. The database and user interface were completely different to the old system. The actual underlying database was structured differently. The staff had had no training and no experience with the system at all and yet they all seemed to be using it like they were old hands. My initial reaction when we returned from lunch was to panic, but then no one else was panicking so why should I? Worst case scenario, they'd have to re-enter the data they'd been entering in the afternoon, which is what they'd have to do if we'd spent the afternoon training like we'd planned anyway. My assistant

Angelo and I spent the afternoon mingling quietly watching them work. There was the occasional, "There's a shortcut to doing that, you know..." but they didn't need any training at all. We didn't end up doing the second data conversion. We just left them to get on with their work. I was very proud of the little system I'd created.

</DefSIN>

DSPACS

I knew from his work on my project that Andy was a very knowledgeable man when it came to computers and technology so when I was asked to look into a project that he apparently refused to sign off on, I was slightly annoyed and very suspicious. I sacrificed a weekend to review the project's documentation. I got to about page one hundred when it became abundantly obvious to me that the product would never work. It was fixable but the project would have to stop and make a fairly small change in direction. One point two million of the nine million dollar budget had been spent and the first prototype was up and running but the technology choices meant that it would never do what it was supposed to do.

Although I was in a management position and Andy was a technical consultant, clearly he understood the office politics better than I did. Andy had attended countless project team meetings and each time he pointed to lines in the specification documentation and asked to see them demonstrated before he would sign off the prototype as 'okay.' I didn't have that kind of patience. I took my evaluation to my boss on Monday morning. I had no intention of spending time on this project until I saw a commitment to addressing the

fundamental flaws which I, and obviously Andy, had found. I was promptly thrown out of her office. The project was given to someone else to signoff. Four years and nine million dollars later, the project was canned. It's one of the reasons I left the public service. I was still young enough and idealistic enough to refuse to be a part of a system that happily dismissed waste on such a scale. I still don't really understand what happened but I suspect that it went something like this: the director who goes to the minister with 'we've made a one point two million dollar mistake' gets posted to Antarctica. The golden rule of the public service is that you can't be held responsible for a decision you didn't make. By the time the nine million dollar bill came to the minister's attention the then Director of Security had long since taken up a new role one step further up the ladder no doubt and the new Director of Security is saying, "It's not my project, I just got here." My director flushed eight million dollars of public money down the sewer. You don't have to be a card carrying tree hugger to be offended by wilful waste on such a scale. I could be more forgiving if the failure was the result of well-meaning incompetence but the death of this project was not manslaughter, it was murder in the first degree.

I am much better equipped to handle the situation now. If you've pursued these memoirs then you should be too.

</DSPACS>

</War stories>

Nuggets

This is a summary of certain things I think are valuable and that I would have persist in your memory long enough to effect a change in your professional life.

For everyone!

The universe does not 'obey' our laws of physics. We sometimes forget that science represents our observations of the universe. From our observations we create models. If our models predict things that we know to be true then perhaps the model may be extrapolated to give us answers about things we don't as yet know.

The problem with observation as the basis for modelling projects is that it relies on the future mimicking the past. In a project it doesn't. By our very definition of a project it is a task without precedent. Some things remain consistent if not constant like human nature and seasonal weather, but unless you're about to hand a multi-million dollar project to a nine-year-old you do not need to send your project managers on courses to teach them the importance of managing delivery stage boundaries. The mechanics of project management are not much more sophisticated than clerical work. Project management is the application of ordinary management

skills in an environment, and for a task, for which there is no precedent.

Software developers came up with Agile, a spectacular departure from conventional thinking which has been enormously successful but won't work for every project. Instead of trying to write down a set of rules that govern project management, study the project environment and the implications to the workplace including culture and human behaviour.

</For everyone>

For project managers

Think 'why' before 'what'

Most of the time projects don't come with instructions which is why they pay you the extra money. You will need to get your guidance the old fashioned way. Let what you are there for guide your actions. Look at the section on Project Manager's Mission. If you don't like what I've proposed, decide on your own but be clear about why you're there before you begin because if you're looking for instructions, eventually they'll leave you in the lurch.

Understand who your real sponsors are

It's not always the one/s who have been put forward. Who are you really working for? If you're employed by a vendor then your first priority is to your employer which will affect your ultimate mission.

Be gentle in the delivery of brutal honesty

The truth is not negotiable. The hardest to tell are the bullies who are used to being told what they want to hear. Do it quietly so as to allow them to save face but make sure there is an irrefutable record of your chat.

Hone your people skills

Study organisational change management, conflict resolution, facilitation, training, communication, leadership and teamwork. The skills you need to be a PM aren't special. The trick is to apply them in the project environment.

Develop empathy skills

Your sponsors will be nervous about their reputation and the loss of control. Project victims will be understandably nervous about their jobs and have finely tuned bullshit sensors after listening to management for so many years. Technicians will be frustrated. They think that because they're the experts they should be listened to but they tend to be bad at articulating their concerns to management and they sometimes haven't been given the bigger picture.

Decide on the problem before you choose a solution

If you're busy feeding data into project management software ask yourself why. What is the problem for which this is the solution? If your data comes from asking contributors, 'how long will this take?' then forget your model. No amount of mathematics is going to give you meaningful answers. You might as well use a random number generator.

Manage expectations

Avoid the temptation to calm stakeholders by telling them that everything's going to be fine. Be tactful and diplomatic but honest. If your sponsors are less nervous than you then you are doing something wrong.

Spikes: a lesson out of the Agile play book.

Target the areas of greatest uncertainty with exercises and experiments long before they are due to impact the project.

The output of the exercises might be thrown away but the lessons learned will be invaluable. Either the experimenters will come back with: 'yes it's do-able' or 'too hard!' Advance warning of an impassable bridge is gold indeed.

</For project managers>

For business managers

For the record I'm talking about the survival of your project, your organisation and your career.

Expect that it's not going to go as planned

Think of a project more along the lines of research and development rather than acquisition. Despite the best planning and preparation when you are journeying through uncharted waters the outcome is never an absolute certainty. You may have employed an excellent project manager but stay in touch, listen to them and be prepared to step in. Be prepared to change tack. Do your part to 'sell' the project to the organisation at large from the perspective that it is not only worth the investment but it is also worth the risk.

Leave spare time and money

Study the risk analysis then leave spare time and money according to your level of confidence in the outcome. Let having money left over or finishing early be your biggest problems.

Look for potential collateral benefits as well as damage

Is the journey of value to the organisation or just the final outcome? If the ultimate payload is not forthcoming what

collateral benefits can be gleaned from your investment? Can collateral benefits be incorporated as part of your risk mitigation strategy?

Plan exit strategies

If the worst case scenario presents itself will you be able to stop the project gracefully? Looking at your spare money and slack time, how much has to go before you step in? What will you do? If the plane is on fire will you be able to land it? Will you at least be able to choose where you crash? Will it matter? Is that a risk the organisation is prepared to accept? If you do not have satisfactory answers to these questions then perhaps you are gambling with money that you cannot afford to lose. Try to envisage as many possible endings to the project journey as you can. Consider the presentation that you will make to the Board should the project crash and burn. Consider collateral benefits, lessons learned. The point is to make the hard decisions before you begin and stick to them. In the heat of battle, with the objective in sight the hard decisions will be difficult to identify let alone address. When that happens, not only is your plane out of control but you just got demoted from pilot to passenger.

Be a little bit Agile

Can an Agile-esque approach be applied to your project? Share the vision but plan only the path to what can be delivered, say in the next two weeks. When that has been delivered revisit the vision. Has it changed? Is it still attainable? Is it still affordable? Has the path there changed? If the way forward is still attractive then plan the next iteration. In this way progress is measured in touchable units not theoretical

percentage estimates of task completion. If the vision is no longer attainable or desirable, then execute an appropriate exit strategy. Budget for the whole but commit only to one iteration at a time.

In business speak it seems irresponsible to set aside funds to a project for which there is no detailed map to the ultimate profitable conclusion but tradition's track record is not good. Statistically speaking, your six million dollar project has a less than ten percent chance of delivering a successful outcome. Now of course you have hired the best project manager in the world, you have the best and most motivated team and you are the only manager that thinks like this... The traditional approach is best suited to the distribution of blame when things go wrong. If you want to succeed, it's time to think outside the box.

Hire a qualified project manager

Diplomas or degrees tell you that the holders can organise their thoughts and activities and have the discipline to see a project through, so while not mandatory, formal qualifications are good things to look for. Does it need to be a degree in project management? Not necessarily. The mechanics of project management are clerical work. The skills are people skills and an understanding of the project environment. Look for the right aptitude. Ask about experiences working with difficult people, people under stress and managing upwards. To some extent you are going to need them to manage you and perhaps some of your peers. Will they do it tactfully? Look for an ability to communicate at all necessary levels including with tradespeople, computer programmers, vendors and business executives. I'm not talking about speaking with a street accent or being able to wolf whistle

when a pretty woman walks past, but about understanding their perspective, and being able to articulate issues across disciplines, levels of education and egotism, with diplomacy, efficiency and honesty. Beware of slavish compliance to established methodologies. Certification in Prince 2 on its own is not the answer to your questions. Teaching someone to use a power saw does not make them a carpenter. Ask prospective PM's how their training will help them to manage the project. Look for things that matter to you, things indicative of the aptitude to manage in the environment that you'd have them manage your project in.

</For business managers>

</Nuggets>

THE END

Acknowledgements

My standard answer to 'How's it going?' is 'Nothing Lotto couldn't fix.' I'm not sure how many people get it. It's my way of saying, 'I'm great.' Whilst I wouldn't be overly upset about a million dollar lotto windfall, if the only thing missing is money then things aren't too shabby. I feel that I have had such a fortunate life that wishing for a lottery win is just ungrateful. I have been blessed in so many ways. Below (in no particular order) are just a few of the blessings who have played a part in my personal and professional development.

Majo: Over the years you have been to me a parent, a teacher, a landlord, a nurse, a financier and a friend as well as a sister. I believe that if there is a God and He's looking down upon us mortals wondering if it was all a mistake, I'm sure He spends quite a bit of time looking at you to remind Himself it wasn't. Without you I may never have graduated let alone got this far.

Rob Thomsett: You taught me that project management was not entirely random. Because of you I started looking at the people aspects. You started me thinking about how I would teach project management.

John Southern: Sometimes when I'm flustered or stumped, even in the busiest times I stop and work on something

completely irrelevant. On one such occasion, when I'm sure you thought I was hard at work, I calculated that if they paid you a million dollars per year you would still be saving our employers more than you were costing them. You taught me that mission and values were not just ornaments to decorate boardroom walls. It has become central to my thinking and underpins many aspects of this book.

Pauline Bright: You may never have had 'Project Manager' on your business cards but in many ways you showed me how it's done. You are tough but not hard. You are gentle but not weak. You command respect wherever you go. You have country culture and city smarts. If they ever made a monument to the epitome of an Australian woman it should look like you.

Clarity Consulting: To Dennis and Julian. You taught me what project management was all about. I am in awe of your ability and integrity. I'm sure that if they sent you to the Middle East we could have world peace by next Tuesday.

Susie Ascott: Colleague, friend and life coach, you feature in many of my project management memories. I've watched you walk into the fiercest of battles with little more than a disarming smile and an iron resolve. You are a truly beautiful person from whom I am still learning.

Melbourne: I moved to the city of Melbourne because a vendor offered me a job when my current position in Perth became untenable. Things didn't work out exactly as planned, in fact, spectacularly poorly to the point where it began to affect my health. My network of friends was based in Perth, Canberra and Brisbane, thousands of kilometres away but Melbourne became my friend. In Melbourne I experienced extraordinary acts of kindness and support

from relative strangers including workmates, clients, people I'd met at the pub, the local mechanic and sometimes even from complete strangers. I'm sure that my guardian angel used up a lot of favours that year! At the time it was life saving, but even now looking back it's truly amazing. The 1956 Olympics were known as 'the Friendly Games.' That was a long time ago but Melbourne, you haven't lost it!

"Take a journey through the world of projects. If you've learned about project management in the classroom then the real world of projects is going to be quite an eye opener. There will be monsters against which you are defenceless. There will be seemingly insurmountable obstacles and your career will hinge on your capacity to deliver in this environment.

So what's wrong with the way we teach project management now?

How should it be taught? What are we doing wrong?

The dollars at stake are in the scale of the national debt.

It's time to start looking at project management from a different angle".

"I was both educated and entertained. This should be a compulsory read for anyone involved in management, not just project managers."

Marj Vijsma,
Teacher & Education Administrator

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