



## A PM's gotta do, what a PM's gotta do ...

*"A reality checklist for Project Intakes"*

The quote above is a free interpretation after John Wayne's quote in the movie "Hondo": "A man gotta do, what a man gotta do". It is the statement expressed by a man, in this a project manager, when they are about to do something which may be unpleasant or which they are pretending to be unpleasant.

### **The Experience:**

A serious nightmare of a PM is a false start of a project. A false start is very likely to occur if the project has no perceived significance, no defined importance, and no associated deadlines or, of course even worse, a combination of these 3 criteria. These aspects are silent killers of a project and they ensure the PM will have a difficult time or even loses the battle from the start. Under these circumstances a PM will be constantly struggling right from the start to get sufficient and skilled resources for the project, he will be constantly changing (extending) your planning and have changing and eroding goals on the "objectives" of the project.

Such a problematic start is caused by unclear definition of the main project aspects at the very start of the project:

- What is the problem to solve
- What are the deliverables
- Fuzzy situation on who the stakeholders are and where their interests lay
- Unknown importance and priority of the project (absolute and in relation to other projects)
- Unclear business case
- No or unclear deadlines
- Alignment of the project to the overall strategic goals

The consequence is dramatic. The project will fail in a big bang or dimple along and will die a "big whisper death", due to the number of failures around the ownership, economics, delivery, quality and moreover frustration on all fronts. An inexperienced PM will default to living through a very lengthy and awkward "tables turned" situation where he tries to keep the project going against all odds, where no support and real interest exists anymore from the stakeholder side.

What can and should a project manager do in these circumstances ?

### **The Project Manager Role and Ability:**

A professional PM is only as good as his last project outcome. The market value of a professional PM is determined by reputation. A professional PM should thus be able to "sense" and create the ability to make a project a success right from the start, and steer clear from projects that are set up for failure with determination. Non-essential and failed projects are in any case bad for the customer as well, so killing bad projects is a "win-win" for both parties. Creating a successful project outcome or effective project kill is not just luck - taking a well structured and assertive approach is a requirement.

The starting point and foundation of effective project management is for sure the use of best practices in PM (refer to ISO 21500) – but it needs to be underpinned by a formidable assertive PM attitude. A professional PM does not "just do what he is told" and just "operates best practices". On the contrary he needs to control the project, defend and manage his project customer's best interest, and build and protect his reputation.



Aspects of this "best practice activities" are listed below:

- Ask the right (painful) questions right from the start
  - o Demand to know why the project should be done
- Avoid any form of confusion on leadership and governance
  - o The rule of 1: there can only be 1 PM, 1 sponsor, 1...
- Ensure clear communications and a common PM language
  - o Create a clear structure and rhythm of formal communication
  - o Demand attendance - do not accept constant excuses for lack of attendance (as it means defacto interest is fading)
  - o Respect all specialist opinions, yet drive for solutions and decisions
  - o Keep documentation in 1 place, no project management by email
- Dig for the "unknown unknowns" constantly
  - o Look for potential trouble at all times
- Search and drive for deliverables
  - o Versus just executing activities
- Does not get emotionally attached to a project
  - o Do not have the tables turned: the PM does not "want the project" - the stakeholders should.
- Putting project in exception or "go for the kill" if he feels this is required
  - o Do not let compelling situations drag on

To be able to execute the above activities a professional and effective PM must have the following character traits:

- Cannot live in fear
- Cannot play a popularity contest
- Cannot choose sides
- Must think independent
- Instills discipline in the project team
- Has a sound hierarchy & authority dis-respect issue
- Does not panic easily
- Does not play a victim role
- Is able to shed of stress easily
- Has accumulated many scars and the ability to learn quick
- Does not put himself in competition with specialists but builds real team play
- Does not blame and does not live in the past, however says "ok, what do we do now"

Persons who become effective PMs are usually already in possession of many the basic required character traits starting out in their career. This means that becoming an effective PM is not for everyone. But even for people with the suitable personality aptitudes these skillswill have to be deliberately developed to a professional level. This can take up to ten years. Conditioning, honing and development takes place mainly by exposure to doing many projects in combination with receiving the right debriefing and mentoring. Effective project managers in the end learn to live by the "a PM's gotta do, what a PMs gotta do " mentality.

### Reality Checklist for success:

To ensure a healthy start of a project an effective PM will use all his skills to push for the execution of a formal set of activities at the start of a project, ensuring that at each step is approached with the "gotta do what I gotta do" mentality.



The following is a compilation a set of essential success factors, which have to be properly managed during the project management activities.

Mandate

- Projects need referential **integrity** and need to exist **officially**: look for an UID (unique identifier of a project), title and short description – and make sure the project is visible on a central list. This assures there is evidence that the mandate is “genuine”.
- Create clarity on **who will be responsible** for leading the intake process. Assign a single PM and business analyst role to the mandated project.
- Make sure basic objectives are understood: get a **written "functional requirements document"** compiled.
- Make sure all project related documentation is stored in a **single, well-managed repository**. For instance SharePoint or similar. Steer away from managing information by “did you see my last email”.

Gather requirements

- **Clear the objectives**, what is the problem that needs to be solved. Vague objectives should be noted as a risk on the risk log. Challenge the objectives by weary of “solve world hunger” or “create world peace” projects, narrow them down to the bare minimum essential “fit for purpose”. Shake all non required weight from the objectives list. A good practice to steer this is to create a “primary objective” and a “nice to have or secondary objectives list”. Kill as many things as you can from the second list. You are doing the customer a big favor this way. Reduction of resource requirements, ability to do more projects and setting the stage to make this project a success by making it less complex.
- Create a **draft business case**, what are the reasons (compliance, law, financial, new product) for doing this project. If there is no clear reason for doing the project, then set out towards killing it. You do not want to work on a project with no business case, as you are sure to not get resources and add no value, and the customer really does not need such projects, however he might not be aware.
- Define **acceptance criteria**, what is required to measure and define the success of and closure point of the project. Without acceptance criteria you and your project team do not know when you are off the hook at the end of the project. Project either keeps running forever and you as PM become the “operational focal person” for the rest of your career, or projects and you as PM are considered a failure because your perceived inability to close a project. In both cases your PM career comes to a grinding halt, as you cannot free up yourself to move to your next project and because people see you as a lousy PM.
- Ask for the **expected time frames**. Makes sure to understand the reasons behind the stated timeframes. Are they real hard deadlines, or just “wishes”. Mentioned dates should be treated as constraints or even risks at this point, but by no means as “planning”. A reality based time frame can only be defined if the deliverables and required approach are understood and a reality based planning exercise has been executed. Never commit at this stage and create a preliminary plan that you just “shrink to fit” to suit the stated deadlines in order to avoid false expectation. If the planning exercise shows that the stated deadlines cannot be met, go back to requirements (can we do less?) and approach (can we do a phases approach?). This creates a reality-based approach right from the start.
- Start off with a product focus:
  - Brainstorm on a **product breakdown structure (PBS)** - a list scheme of all deliverables that need to be produced to get to deliver the required outputs (reach the objectives). Very often over 25% of the required products fail to make it to the radar at the start of a project and are very often a reason for



failure of the project! This is usually due to a narrow focus on some aspects of the project neglecting other relevant areas (i.e. deep technology focus but forgetting the buildup of a governance structure to operate the technology successfully afterwards). Use a small team and post-its on white board, take picture, formalize in a second step later on.

- Create **short descriptions** of those products to make sure there is more than just 1 word describing it. Products can be anything from hardware, software, decisions, licenses, hiring a person, creating a user manual, creating procedures, train people. This makes sure there is a common understanding of the products and avoids debates and interpretations each time one reviews the PBS.
- **Do not limit the project** to only technical or IT deliverables. Think governance structures, training, staffing, licenses, audits, approvals...
- Make sure to understand the relative and absolute position of the project in the **priority ranking at the customer**. If there is a whole portfolio of projects existing, prioritization techniques are required. Challenge whether this project is required and will get resourced vehemently from the start.
- Drive for **formal approval** to get project visibility: Create a project brief and get it "approved" by your project board. If you cannot get a project board and associated approval, refuse to start the project. You are doing yourself and the customer a favor. If nobody is interested and there is no basic governance you will find yourself in a tables turned scenario immediately. You as PM will be pushing for progress on the project and fight to get resources, however the customer is not helping and seems not interested. Such a project will go nowhere. You will look like an incompetent PM.
- Attention to the following:
  - Treat stated objectives like "install new server" as a **risk**, and go to next point
  - Never confuse "products to work on" with "objectives to reach" (always drill for "**what is the problem to be solved**")
  - **Sequence** these delivery of products (logical order over time, respecting causality)
  - See what is **known or unknown** about how and who to produce the products (and create a risk register alongside). Strive to surface "unknown unknowns" and convert them to "known unknowns" in order to mitigate them:
    - According Rumsfeld: „There are known knows; there are things we know we know. We also know there are known unknowns; that is to say we know there are some things we do not know. But there are also unknown unknowns – there are things we do not know we don't know.“
  - Start an **issue register** and make sure to note all concerns, questions, important tasks in a register (Excel list, or better SharePoint list)
  - Make sure to store all project documentation in a central place and **manage the content vehemently**, create alerts for people. Aim to create a "pull" system for info versus "push". Make sure people understand that if the information is not on the platform, it does not exist for you and the team. Once your team starts to notice that they are able to easier find current information on the managed platform versus relying on "did you see my last email", you start to save time and reduce miscommunications.

#### Initiation

- Get **acceptance** for doing the initiation phase of the project. In this phase you need to work on managing and mitigating the risks (unknowns about the products you will need to produce), start to shape and write formal work packages for these tasks and make sure to assign **1 responsible per work package**.



- Start a **weekly checkpoint meeting** with people responsible for work packages. Create a formal write up of the meeting for reference. Only have people who have active WP in that meeting, this avoids large groups in meetings with “tourists”. Dismiss “interested people” without active WPs from your meeting. They can read the notes on the platform and approach the PM or WP owners for info.
- Similar start a **bi weekly “highlight” meeting** with the project board. If they do not show up put the project in exception. Projects where the board takes no interest go nowhere and lead to the previously discussed “tables turned syndrome”.
- With the risks managed you should now be able to **produce a PID** (describing the plan for the rest of the project (quality and acceptance, resource, budget...)).
- Make sure to **define stages**, work packages per stage and products that will be produced by each stage. With all this you should now be able to produce a Gant chart - and show a **realistic timeline** for the project.
- The rest is **execution**. Highlight reports, keep issue and risk log, raise exceptions and so on.
- Having **clear objectives and acceptance criteria** defined upfront will allow you to close the project.

## In the Spotlight: Project Management

The classic view of Project Management is the discipline of planning, organizing, motivating, and controlling resources to achieve specific goals. However a project is a temporary endeavor with a defined beginning and end undertaken to meet unique goals and objectives, typically to bring about beneficial change or added value.

The primary challenge of project management is to achieve all of the project goals and objectives while honoring the preconceived constraints. These primary constraints are scope, time, quality and budget.

In practice the PM is faced with handling many startling, surprising and real-world situations to get and keep a project into a controlled state, right from the start of the project. The all-encompassing crucial and recurring question is: Is this project (still) worth doing?

This means that in reality effective PM cannot and will not only consist of the straightforward use of textbook PM best practices, which tells us mainly “what to do” and a bit of “when to do it”.

Real world management of a project toward a success, or effective kill, depends heavily on having a PM on board who knows “how to do it” and lives by the motto “a PM’s gotta do, what a PM’s gotta do”.