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The Basics

This chapter defines what a project is, what we mean by effective project management, and what it requires to manage a project.

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Introduction

Since the first edition of this book, a new approach to software development projects (Agile) has been gaining popularity and is even being used on other types of project. The main difference between this and the traditional approach to projects is that the requirements are allowed to develop and change during the project. Where agile methodology is being used, it will have an impact on project management and these instances have all been noted in this new edition.

Effective Project Management

Whatever type of project you are managing, effective project management is about completing the project on time, within budget, and with the needs of the business fully met. This book will show you how to deliver these desired results on each and every project. And it's not rocket science, just common sense and some basic skills.

The four key skills a project manager needs to be effective are:

- **Planning:** a lack of adequate planning is the single most common cause of project failure
- **Organizing:** making sure everything happens when it needs to and not too soon or too late
- **Leading:** the people working on the project, together with all the other project stakeholders
- **Controlling:** in order to measure and report on progress, identify problems and other issues and deal with them



Hot tip



These are the four key skills every project manager needs to develop.

Follow the steps set out in this book to develop these four key skills and you will become an effective project manager.

What is a Project?

To start at the beginning, what do we mean by a project? Put simply, it is a series of tasks or activities that have to be carried out in order to bring about a change or achieve some other identified objective. The project could be a personal one, such as learning a foreign language, a construction project, like building a house, or it could be to implement some new business venture.

Key Characteristics

Whatever type of project it is, there are three key characteristics that can be associated with it:

- 1 It must have a goal (some sort of specific outcome), as there would be no point in carrying out a project if it did not achieve anything of benefit
- 2 It must be started or initiated, as projects do not happen spontaneously
- 3 It needs someone (the project manager) to run it and steer it through to the achievement of the goal

So a project is the implementation of a change, with a beginning, a middle and an end. It will also have a time frame, it will be unique (every project is different in some way), people are involved and it will usually have finite resources (people, time and money).

Project Life Cycle

The beginning, middle and end stages (or phases, as they are sometimes called) of a project all have their own characteristics. This book covers the complete project life cycle, starting with the correct way begin a project (Chapter 2), through however many middle stages or phases there are (Chapter 10), to the final step of closing the project down and learning from it (Chapter 11). This whole approach is based on common sense and best practice developed over many years and countless successful projects.



Don't forget



Every project is unique, don't assume it will work out exactly the same as the last one.

Project Management

So what sort of skills does a project manager need and can anyone do it? In practice, project management requires many of the basic management skills that a line manager needs, but it also requires a different approach.



Hot tip



Project management requires common sense and a structured approach. This book will give you the structured approach.

Can Anyone Do It?

Project management does not require any magic gift, just some common sense coupled with a structured approach to things. Assuming that you, the reader, possess common sense (the purchase of this book would certainly suggest it!), this book will provide you with a structured approach to managing projects.

Line Management

Let's start by considering what's involved in traditional or line management. Typically, this would involve managing a department or a group of people, so first of all you need people to manage. Then you would need objectives for what you have to achieve with the group of people. Then you would need some sort of budget (expenditure for the people and other resources you will use and revenue or targets for the output of the group). Having these things in place, you can get on and manage the business process by allocating and scheduling people's work, developing and motivating people, reviewing their performance and giving them feedback. It does not matter what the group is doing, the management process is the same. To differentiate this from project management, it is referred to as process management.

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Project Management

Now if we consider managing a project, are there any of the preceding things you won't need to have or do as a project manager? The only possible item is 'developing people' which is not usually a project management responsibility (although it could be if someone is permanently allocated to a project manager). The lists are very similar. To manage a project, you will need agreed objectives. You will need people to work on the project. You will need a budget for the people and other resources you will use. You will also need targets for what you will produce.

You will need to allocate and schedule people's work and, while you might not be responsible for people's development, you will still need to motivate them. While you might not review their performance, you will still need to review their work and give them feedback.



So, in summary, there are not that many differences between the line or process management role and the project management role; and most of those differences are quite subtle. As a project manager, you will still need the same sort of infrastructure. You will still have to do the same sort of management tasks and, consequently, you will need the same sort of skills. The real difference between the two roles is that line management is the management of an on-going process, while project management is the management of change.

Don't forget



Project management is the management of change.

Managing a Project

As we saw in the preceding topic, line management involves the management of a process. Your department, division or business will continue answering calls, sending out invoices, or producing widgets as long as you stay in business. Project management, on the other hand, is the management of change.

Management of Change

You will be changing (perhaps radically) the way things are done, which is very different from managing the doing of them. The project manager requires all the basic management skills together with the ability to manage change. So let us look at some of the project or change related activities that are involved in the role, as these are the key things the project manager will need to do to stay in control.

Beware



If you don't understand the objectives, no one else will!

Clarify the objectives

Projects often start out with poorly defined objectives (if any). You will need to resolve these and get them agreed with senior management before the project can properly start.

Develop the plan

Planning is probably the single most important activity a project manager has to carry out. But it's not a one-off activity, the project plan will need to be evolved and adapted through the life of the project.

Manage the risks

Change always involves risks and these risks are compounded by the uncertainty and unknown that will exist at the start of a project. It is therefore essential to carry out some sort of risk assessment exercise as early as possible in the project. Failure to do so could result in the project getting knocked off the rails by the first thing that goes wrong. Risk management is critical to the success of a project.



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Manage and motivate the team

As project manager, you do not usually have line management responsibility for the team, but you still have to keep the team managed and motivated. In fact, it is even more important if you don't have direct managerial authority for the people in the team.



Communicate with everyone

People need to know what's happening on a project. Not just the people on the project team but everyone who is affected by it.

Measure progress against plan

The project manager needs an accurate way of measuring project progress and, having measured it, they need to keep everyone in the picture about how the project is going.

Deal with problems

Problems will occur, so you need to plan for them and deal with them. If you have identified potential risks, you can make contingency plans for them, but, if you haven't, you will need to deal with any problems before they cause a major upset.

Steer the project to a successful conclusion

As well as dealing with day to day issues, the project manager also has to retain the big picture and make sure the project stays on track until its destination.

Hot tip



Communicate with everyone involved on or affected by your project.

4 Steps to Success

Earlier, we defined a project as having a beginning, a middle and an end. We can build on that definition and expand it into four steps to a successful project.

- 1 Identify your objective or goal, what the project is trying to achieve, and agree it with all concerned
- 2 Plan how you are going to get there and decide how you are going to measure progress against the plan
- 3 Carry it out by managing the project until you have achieved your objectives
- 4 Hand it over; you have achieved your objectives and your job is done

Beware



Never ever be tempted to dive straight in at step two or three.



It sounds simple, and it is, but it is amazing how many people just want to dive in at step three and get on with it. The other problem the same people have is with step four, letting go. If they haven't defined their objectives or planned the project properly, the chances are that it will never be quite right. They will keep having to make changes until they have finally understood the business objectives. This is what they should have done, but probably failed to do, in step one!

Responsibility & Authority

When you are asked to manage a project (or perhaps told to), you are effectively being asked to take responsibility for it. Accepting that responsibility is the commitment that you make to your organization.

Responsibility

Lack of accountability is a common reason for project failure. If a project is to be successful, it is absolutely essential that the project manager accepts full responsibility for it. They are responsible if it goes well and they are equally responsible if it goes badly. They need to understand the objectives and be clear on why it matters to their organization.

Authority

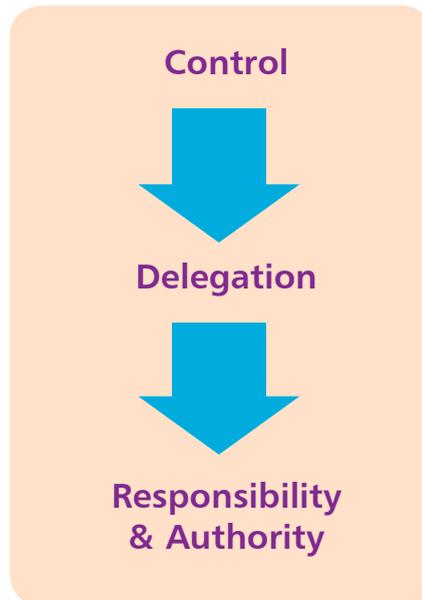
The other side of the coin is that once the project manager has accepted responsibility for a project, then the organization must give them sufficient authority to carry it out. It is a basic tenet of management that you cannot have responsibility without being given an equal level of authority.

Delegation

The organization is delegating to the project manager. In the same way, the project manager will be delegating responsibility and authority to the people working on the project.

Control

The final part of this process is control. When delegating tasks to team members, you still have responsibility for ensuring that they carry them out correctly. This means having some form of control. The more significant the task, or the more inexperienced the delegate, the more control you need to keep over it. But good delegation is about trusting people and allowing them to get on with it, while still being there to help if they need assistance.



Beware



If you don't fully support a project, then don't accept it.

Hot tip



Trust your team and delegate to them, but make sure you stay in control.

Good Project Managers

We all want to be seen as good project managers, but what exactly makes someone a good project manager?

Successful Project Management

Well, for a start, a good project manager will be a successful project manager. They will have a record of managing projects that have been successful. But there are other things we can also observe in successful project managers, so, if you want to be a successful project manager, follow these steps:

- 1 Be committed to the project, believe in it and actively support it
- 2 Be a good motivator and make everyone feel like they really are part of the team
- 3 Delegate by using the skills and abilities of the team members and acknowledge their work
- 4 Know and understand what the business needs from the project and communicate it to the team
- 5 Believe in yourself and know where you are going, the team will be looking to you for a lead
- 6 Be seen to be making progress by keeping track of each piece of work that the team completes
- 7 Be well organized, nothing is more worrying than a disorganized project manager
- 8 Stay in control of things; if you don't know what's going on, the project is likely to go off the rails
- 9 Be proactive rather than reactive and communicate with everyone involved with the project

Hot tip



Make sure you really understand the business needs.

Carry out these nine steps and you, too, will be a successful project manager.

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Be Successful

As a project manager, if you do and are seen to do the things listed on the page opposite, you will be successful. That, together with sound common sense, a basic management knowledge and a good understanding of your business, will ensure you stay successful.

In the introduction to the book, we identified four key skills that every project manager needs to have. These were Planning, Organizing, Leading and Controlling. But there is one other key skill a successful project manager needs to have:



Communication

Good project managers are also good communicators. You don't have to be an eloquent orator, you just need to be able to talk to people. Ask them how they are and how their work is going. Tell them what you are doing and why. And never forget that communication is a two way process. As well as talking to people, you also need to be able to listen to them and take in what they have to say.

We will be looking at communication under several topics later in the book but, for now, start by thinking about who you need to communicate with. It isn't just the project team, although you certainly need to communicate with them.

Hot tip



Learn to communicate with people on a regular basis and you will be a better project manager.

Project Management Style

One thing anyone new to project management may need to do is adapt their style of management.

Negotiation

Although a project manager will have people on their project team, at best they will be seconded, but, more likely, they will be shared with their regular line managers. So instead of being able to tell people what to do, the project manager will have to negotiate with them (and probably their line managers as well) and agree what they will do and when they will do it. This requires negotiation and the ability to relate to and see things from other people's points of view.

Prioritization

Most small project teams have no or very few full-time project team members, so the part-time team members will have other work commitments and other priorities. The project manager must be able to discuss priorities and agree them with the team members (and again with their line managers). This can become a real problem, particularly if schedules need to be changed (and they probably will) during the course of the project. The project manager needs to be able to negotiate and renegotiate as necessary.

Communication

As the project manager, you need to communicate with the project team, the project sponsor, and the wider stakeholder group. You will need to communicate well and you will need to communicate often. It is not a one-off process, you will need to keep on communicating to ensure the success of the project.

Hot tip



Be flexible and reasonable in your negotiations. Other people are more likely to be reasonable if you are.



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Getting Commitment

It is essential that the project manager gains the team's full and complete 'buy in' to the aims and objectives of the project and their understanding of the priorities, as these may well be very different from the day to day priorities of the business. In short, the project manager must 'sell' the project to the team members, their managers, and everyone else in the business.

Delegation

If it's starting to sound as if the project manager needs to be some sort of 'Lone Ranger' complete with 'silver bullets' that's not the case. In fact, it is just the opposite. They will not be able to do everything themselves. If they try to, they will quickly alienate the team. So the project manager must delegate effectively.

Effective delegation is all about recognizing and using people's skills and getting the most suitable person to do each task. Again, this needs to be negotiated and evaluated against all the other requirements, to get the best overall result for the project.

Documentation

All of the above discussions and agreements must be documented and copied to the team members (and their line managers, where relevant) so that there is no room for misunderstanding. That is not to say the team members cannot be trusted, but very few of us have a perfect memory. A brief list of tasks, to whom they were allocated to and when they need to be done by, acts as an excellent reminder.

Leadership

Project managers need to be open, build trust with their teams, and motivate them in order to build the team spirit necessary for a successful project team. What they have to demonstrate is real leadership. Not the sort that comes from being 'a star' but the sort that gets built by showing that they are ready to lead by example. To take decisions and accept responsibility for them, to admit mistakes and build on them, to encourage and build the team: that is real leadership.

Project managers are 'enablers' rather than 'doers', they must be able to help and facilitate other people's work. If they don't trust their team, their team won't trust them. They need to help others to do the right thing, rather than doing it themselves. Then people will have pride in their work and will believe it really is a team.

Hot tip



Work on building team spirit by occasionally organizing a fun event. It's a great way to motivate people.

Summary

- A project is a series of tasks or activities that need to be carried out in order to bring about a change
- Every project must have a clearly stated goal or objective, it needs to be initiated and it needs someone (the project manager) to steer it to a successful conclusion
- Projects will take place within a time frame, every one is unique, it will involve people and it will usually have finite resources available
- Successful project management is about getting projects completed on time, within budget, and with the business needs fully met
- To manage a project successfully, you need basic common sense and a structured approach. You provide the common sense and this book will provide the structured approach
- Project managers need to manage change, clarify objectives, develop a plan, analyze risks, manage and motivate the team, measure progress and deal with problems, in order to steer the project to a successful conclusion
- There are four steps to a successful project: identify the objective, plan how you will get there, carry it out and then hand it over as your job is done
- Make sure you take full responsibility for your project and make sure you get sufficient authority to be able to carry it out
- Project managers need to develop four key skills: Planning, Organizing, Leading and Controlling
- Effective delegation is about recognizing and using people's skills to carry out suitable tasks
- Good project managers are successful project managers and they never forget to communicate
- Project managers need to develop a style of management that uses negotiation, prioritization, selling the project, delegation, documentation and leadership