

LESSONS IN PROJECT MANAGEMENT

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Understand the Characteristics of a Project

Jerry and I had scheduled a meeting prior to the company closing for New Year's Day, and I found him waiting outside my office when I arrived.

"Jerry, I am terribly sorry to be so la—"

"Tom! Good to see you," he interrupted. "Don't be silly about being late. I just got here 15 minutes ago myself."

"It took me longer than anticipated to get the snow shovelled this morning. I must be moving slower in my old age!"

"A shovel? We need to get you a snow blower!"

I smiled at his suggestion, recalling I had similar thoughts just a few hours earlier.

Jerry and his wife, Barbara, were trying to buy their first house, but the hunt for the perfect home had been long and difficult. He shared some

of those struggles with me, and we talked at great length about the house my wife and I purchased a few years ago.

"The right house will come along, Jerry. Did you see any you liked this weekend?"

"Not really, Tom. We looked at a few open houses on Sunday, but the weather prevented us from looking at any more. We are trying to remain optimistic, but it's really starting to drive us crazy."

"Well, stick with it," I said, trying to sound reassuring.

Jerry was a relatively new employee who worked in the Information Infrastructure department. He had big, blue eyes and a thick head of hair with shaggy sideburns. The sideburns and bushy hair gave him the slightly nerdy appearance that many people have come to expect of people who work with computers. If it was possible to tell such things based on a person's appearance, he also looked like someone who liked to work with technology more than people. He had just been given the responsibility of upgrading the company's phone system but wasn't sure he was ready for the task. The work involved inspecting the phone lines, replacing the lines where needed, and upgrading the software. Jerry predicted the effort would take four months to complete and cost upwards of \$350,000. There would be six people involved, although not all full time.

After talking awhile longer about his house-hunting experiences, I asked Jerry if he wanted to talk a bit about his upcoming project.

"Sure," he said. "Actually, I am not sure there is anything you can help me with. Aren't you supposed to help project managers?"

I was initially taken aback, thinking I had perhaps missed something.

"Well, yes. But it sounds like you have a pretty important project. Are you an experienced project manager?"

"Project? Project manager?" Jerry questioned, sounding unsure. "We don't do projects in this department. We just go ahead and get the work done."

The light bulb went off in my head, and I knew I was going to have my hands full. Not only was Jerry an inexperienced project manager, he didn't even know he was the project manager!

"Jerry," I said, "let's talk."

LESSON

Most work typically falls into one of the following categories:

- **Support work** is associated with keeping current production processes working and stable, such as fixing a crashed computer application.
- **Operations work** is associated with the ongoing execution of a company's business processes, such as entering accounting transactions or ordering supplies.
- **Overhead** includes vacation and sick time.
- **Management and leadership** is associated with the time spent managing people and moving the organization forward to achieve its business goals.
- **Projects** are temporary work used to do new things and build new or enhanced products.

Project work is the area of interest in my new job. Projects are not something only certain departments do—they are how work gets done. In fact, projects can exist in any functional area. This is a key difference between the work a person does and the organization where that person works. For instance, your department may execute some projects as well as perform support type work. Your operations area may execute projects as well as operations work. Your management team may even do projects in addition to their management work. This highlights the difference between your functional group and the actual type of work you perform. Although there are differing definitions of projects, all projects have three major characteristics—a finite time frame, uniqueness, and deliverables.

First and foremost, a project must have a start and end date. Although one could quibble about the exact dates, there must be a time before the work existed and there must be a time when the work no longer exists. Entering transactions into an accounting system, for instance, is not a project because the activity goes on indefinitely. Answering questions from the users about the accounting system software is not a project either, since those questions will be asked indefinitely as well. On the other hand, Jerry's work to upgrade the phone system was not happening before, and at some point it will be completed (even if it goes over its deadline, it will either be completed or cancelled). The phone system may be upgraded again, but if that happens, there will be a time gap between the upgrades, so the work is not continuous. The next upgrade will have a start and end date as well.

Understand the Characteristics of a Project

All projects are also unique. They have unique characteristics, unique deliverables, unique people, and unique circumstances. As a contrast, if you worked for the help desk, over time you would begin to master your job since there is a certain rhythm and pattern to the work. Once you get some experience, you find you can handle the repetitive nature of the work by following a certain set of processes and procedures. This is an example of ongoing operations. Working at the help desk today is similar to working there yesterday and it will be similar tomorrow and a year from tomorrow.

On the other hand, projects are unique. This characteristic makes them hard to estimate and hard to manage. Even if the project is similar to one you have done before, new events and circumstances will occur. Each project typically holds its own challenges and opportunities.

Lastly, all projects produce one or more deliverables (deliverables also may be called *products*). These deliverables could be anything from a computer application to an analysis document; from a recommendation to a new house. If the work does not result in the creation of one or more deliverables, then it is not a project. Even if your project is building a service, you would have deliverables such as a procedures manual, training classes, and perhaps marketing literature.

Most people also assign other characteristics to projects. These include a defined scope, a defined set of resources (people, money, equipment, supplies, etc.), common objectives (stated or unstated), and an assigned project manager and project team.

It is important to note there are no upper or lower limits in terms of effort, cost, or duration. A project might take 10,000 hours to complete, or it might take 10 hours to complete. Very small projects are typically called *enhancements* or *discretionary requests*. Of course, how one manages these small and large projects is not the same. The 10 hour project probably does not have any formal project management techniques applied to it at all. A large project will require much more rigor and structure.

Projects can be found in all types of businesses—from marketing to manufacturing to movie studios. Yes, even in the Information Infrastructure department where Jerry works! How many times have major initiatives failed because they were not organized and managed as a project? Many, many times. Jerry wants to just “get the work done.” That type of thinking is fine for a 40-hour project where work can be planned and defined in your head. However, this initiative is too big, too complex, and too important for Jerry to manage in his head. He will have a better chance of success if he defines, structures, and manages the work as a project. When I meet with him next, the education process will continue.