



LEADING SUCCESSFUL PROJECTS:

The Lost Art of Influencing People to Maximize Results

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This is a success handbook for you, your team and your company. In our 35 years of business, we've experienced and witnessed first-hand that lasting success comes from sound strategy, effective teamwork, excellent negotiation and artful resource management. With that in mind, we wanted to share this with you for your continual mastery of success and achievement.

This eBook is a summary of best practices and techniques developed by our good friend and colleague, Dr. Matt Fourie. Matt works with the world's largest organizations and advises them on best practices in running and/or "rescuing" high-impact, complex initiatives.

We're excited to dedicate this book and its lessons to you and your team. Feel free to share this book and its lessons. We welcome questions or comments that arise as you use the techniques described herein.

Enjoy—Compliments of Omnikron



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Most of the time they're doing both and that's where we come in!

Leading Successful Projects: The Fine Art of Influencing People to Maximize Results
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TABLE

OF CONTENTS

Introduction: “Managing Projects”	4
Chapter One: Align Stakeholder Expectations	7
Chapter Two: Who Is Accountable?	10
Chapter Three: “Project Success Lies In The Details!”	13
Chapter Four: Get “Close” To Your Most Important Stakeholders!	16
Chapter Five: Scope Creep!	20
Chapter Six: Alignment, Alignment And Alignment!	23
Chapter Seven: Are Your Project Managers Good Problem Solvers?	27
Summary	30



“MANAGING PROJECTS”

Is this a Freudian slip or is it different
than PROJECT MANAGEMENT?

Yes “Managing Projects” and “Project Management” are indeed, different! Project Management practices have evolved into highly professional techniques and tools, but sadly the **“managing”** part lagged behind and never enjoyed the same status. This is especially true in the IT community, as I’m sure you too have experienced.

Since my associates and I have been involved in many consulting assignments where we had run or rescue projects. With that experience under our belts, we wanted to share this eBook to help you or key team members glean tangible success tips & techniques. The following pages will list a few situations and guidelines that demonstrate why projects tend to experience problems and what could be done about them.

Herein you’ll see 7 Tips for Leading and Managing Successful Projects. Some may seem like common sense, but don’t be fooled. Take a look on the next page and rate how well your team may be doing on these “project makers” or “project breakers”!

1. **Align stakeholder expectations** – The Project Management Institute lists this as one of the major reasons for project failure. We will support that through our personal involvement in project management and project rescue efforts with diverse clients in many parts of the world.
2. **Lack of Accountability** – Why is this so difficult to achieve? There are a few core reasons why this is happening and should be easy to rectify.
3. **Lack of Specificity** – Project success lies in the details and it is “better the devil you know than the devil you don’t.”
4. **Too far away from your most important resources** – Do you know who these resources are and do you know how to correctly influence them, especially if they do not have any vested interest in your project?
5. **Scope creep** – Who does not know about this? Do you know why this is happening and what to do about it? Many project staff just do not know how to deal with this, let alone what to do to avoid this from happening in the first place.
6. **Misalignment** – This is the most misunderstood concept in project management and is one of the most important factors contributing to project issues.
7. **Poor problem solving skills** – This might sound out of place, but every Project Manager should be at least a proven professional problem solver. There are many other skills that the PM should possess, but problem solving is at the top of the list. The most common omission is the insistence of finding the underlying reasons or causes of problems.

The suggestions made are general guidelines of how similar situations were solved in the past. Experienced project and management professionals will recognize many of the suggestions, because they are already employing these strategies.

Please use your common sense in every suggestion made. Apply it through the “adopt and adapt” principle. In other words, look at your unique project situation and see what you can adopt from our suggestions and then adapt it for your own situation.



Every decision that comes your way is an opportunity to improve what you are doing, to make some progress, however large or small.

-Dr. Charles Kepner



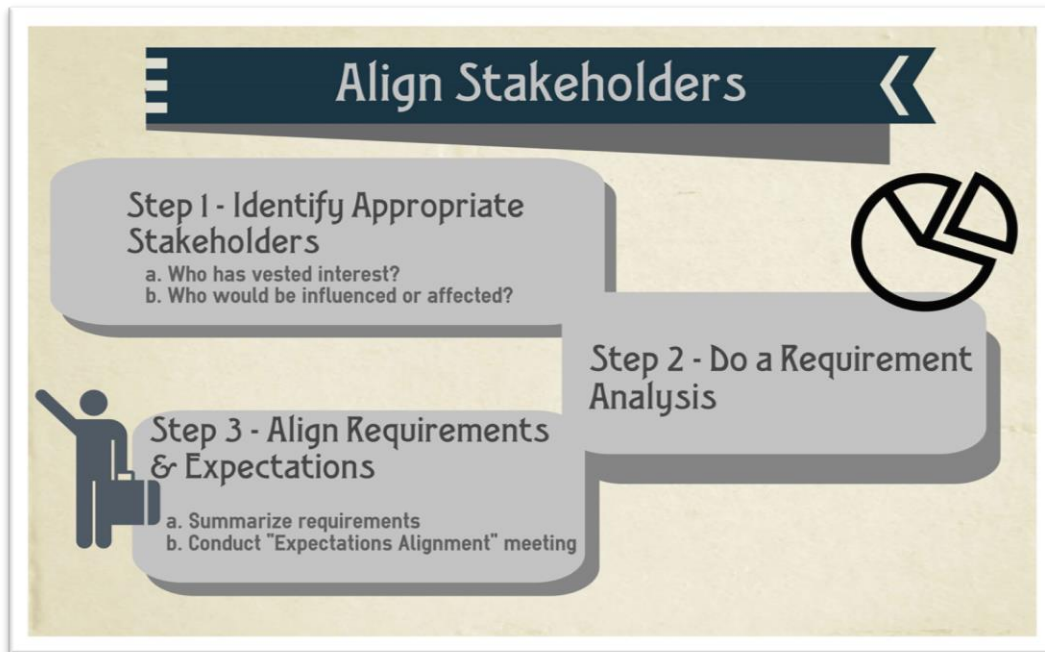
1. ALIGN STAKEHOLDER EXPECTATIONS

...or be prepared to
deal with a toxic
fall-out!

This is where all the trouble starts. When we asked project managers what they would like to fix first they always answered without doubt, “the varied project expectations and outcomes/deliverables that most of our stakeholders do not agree on.”

Stakeholder “mis-alignment” is the underlying reason causing effects such as:

- ◆ **Scope creep** – end users assuming that their expectations were covered by the project scope and are now trying to include this into the scope.
- ◆ **Vendor issues** – vendors who were not aware that a specific expectation also included “x” and now would drive the costs beyond the reach of profitability.
- ◆ **Budgeting issues** – resources not planned for because it was not anticipated correctly and not included in the design phases of the project causing time and budget issues.
- ◆ **Resources issues** – non-availability of SME resources when needed and scheduling difficulties to get resources at a time and place when they are needed.
- ◆ **Quality of work** – the quality of work suffers due to having to cut corners trying to incorporate certain additional work not originally planned for.



Here are five steps involved in aligning stakeholder expectations:

1. Identifying all the appropriate stakeholders who need to provide outputs/deliverables/inputs into this project and also those stakeholders who will have to provide services to achieve the deliverables agreed to. As you can see from the statement above we need to consider various stakeholders based on the following two questions:

- a. **Who do we need to consider that would have some kind of vested interest in this project?** This normally involves decision makers inside and most importantly outside the company. This also includes those that could consciously or sub-consciously influence the effectiveness of your project. Lastly you need to consider the implementers and contributors that you would rely on to provide inputs that would make this project successful.
- b. **Who do we need to consider that would be influenced or affected by this project?** This would provide a different set of stakeholders and in many cases they would overlap with some of the stakeholders already listed above. By the same token we could also identify important ones that we might have overlooked. This question normally identifies those stakeholders we tend to not think about, such as a security guard at the entrance of your work complex having requirements about vehicles entering the facility.

2. **Do a requirement analysis** for all the stakeholders. At this stage we have another shortcoming entering the equation and that is we tend to use a Business Analyst to do this task. In most companies they normally are junior staff who do not have the necessary business knowledge or experience to fully understand a requirement being listed by a Business person. They cannot question its validity or talk about the requirement meaningfully. I know that it would be more expensive to use an experienced person, but I will guarantee you that it will cost you less than what the scope creep is going to cost you eventually.
3. **Align the requirements and expectations.** This is the most difficult part, but if done correctly would have a major impact on your project staff and the eventual success in terms of costs, time and quality of your project. I would suggest you do the following:
4. **Summarize all the requirements that align** from the outset, because they do not need any further discussion. Put all of these in a document and circulate for all the stakeholders to evaluate.
5. **Conduct an “Expectations Alignment” meeting** with all the stakeholders involved. This could be one meeting or several meetings with the vested interest parties only. It is normally more productive to have specific meetings with appropriate vested stakeholders.

It might seem like “overkill” to do it this way, but believe me if you follow these guidelines you will have a 100% improved chance of running a successful project. You would have been proactive in solving one of the most important causes for project failure.

Rescuing IT Projects, by John Hudson

“According to the Standish Group, a successful project must be completed on time, on budget and deliver the promised quality.

“Of the many Standish Group reports published since 1994, two of the top five causes for failed IT projects have been given as:

- **Incomplete Requirements**
- **Lack of User Involvement...”**

www.kpf.com/resources/blog/it-csi/rescuing-it-projects

2. WHO IS ACCOUNTABLE?

Why is this so difficult?

Accountability is normally not fully understood and we've found in many cases this continues to be the situation for not having adequate accountabilities for project objectives and outcomes. **There tends to be a misunderstanding between the terms accountability and responsibility.**

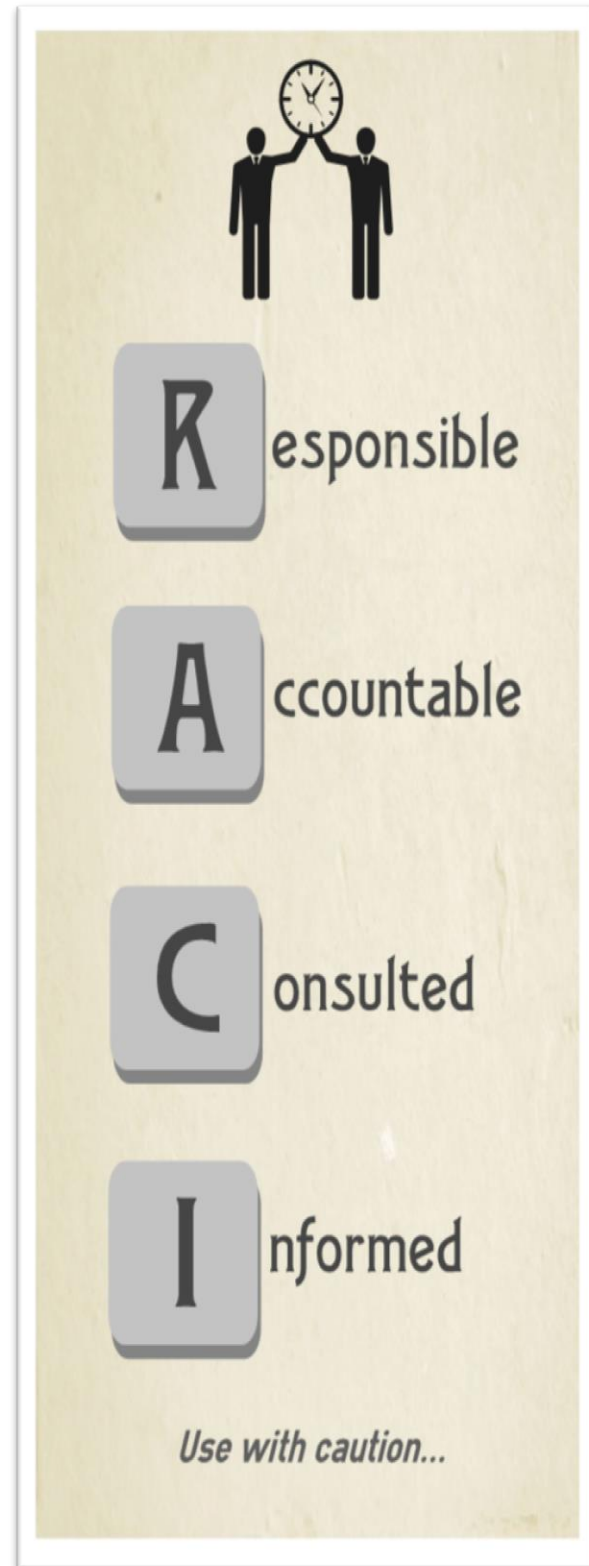


The general rule in project management is that someone has to do the job and someone is accountable for that job. It could be the same person or two different people. So, responsibility is all about who is supposed to perform the task or job, whereas accountability is the one person that would assume final and prime responsibility for that task. The “buck stops” with the person who has accountability and a project team should do everything in their power to ensure that all the project accountabilities are vested with the “internal company team.”

I once worked with a team responsible (note I am not saying accountable) for the successful execution of 85 projects, which were all running over budget and time. When we got involved to help them “rescue” this situation accountability was the first thing we noticed that needed to be corrected. **Nobody on the internal company team was accountable for any of the 85 projects.** The staff were basically coordinators and communicators on behalf of the vendors. They kept each vendor accountable for their respective projects or sub-projects, which created a nightmare and which was totally wrong.

Today project staff are trained in the **RACI (Responsible, Accountable, Consulted and Informed)** model and that is good, but again the deficiency comes with the interpretation of what accountability means. According to the definition offered by ITIL, accountability means someone who has the authority to reject or approve an activity or task and that is what I have a problem with. **Who is ultimately accountable for the successful completion of that activity or task?**

The closest the RACI model gets to answering the question is to look at the responsible person. According to the ITIL definition, the responsible person is the one who is responsible for actually doing it and not the one that is accountable for it. I think that is the GAP and I am not trying to lay blame anywhere, but what I am trying to demonstrate here is that there is some confusion about the requirement in or around ACCOUNTABILITY. That is what we've found in the project world out there.



I want to make a suggestion that we need to let common sense prevail and use the RACI model in a way that would stop all possible reasons for having a project fail. I suggest the following: Call it what you want or do what your organization is used to, but make sure to cover the Roles and Responsibilities by using keywords in a RACI matrix by being more specific. It worked handsomely for me over the years by ensuring the following:

- ◆ Indicate who is the approver. You cannot use an **“A”** for that, so use the key word **“approve.”**
- ◆ Use the **“A”** for accountability, but educate your staff that this means accountable for the **ultimate success or failure** – no exceptions!
- ◆ Use the **“R”** for **responsible** and meaning who is to perform the task or do the job – you can have more than one responsible person. Even better, why don't you use key words to more **specifically describe the actual task** such as; make recommendation, do research, conduct interviews, and other similar short descriptions?
- ◆ Use the rest as you are used to, but if something is important enough to be noted please go ahead and use your common sense and use your own short descriptions. This will aid clarification rather than causing confusion.

"It's not that they can't see the solution. They can't see the problem."

- G.K. Chesterton

When we explained these definitions to our team with the 85 projects, they implemented a new RACI and within 6 months they “plugged the leaks” in the system. All the new projects were running much more effectively and some even started to track within their budget and time constraints.

3. “PROJECT SUCCESS LIES IN THE DETAILS”

Better the devil you know than the devil you don't



We normally say, “**The devil lies in the detail**” and that is the exact same impact if you are not being specific in what you do in project management or even more precisely when you are managing projects.

You don't know what you don't know is very true, especially if you are dealing with complex issues and relationships in project management. So, when managing a project you will rely heavily on factual and exact verified information, otherwise you would be doomed to failure. We suggest very specific process questions you could ask that would help you to derive explicit statements from staff, vendors and customers. Questions such as:

- ◆ Can you be more specific about “x”?
- ◆ What do you mean by “x”?
- ◆ What is happening that is not supposed to be happening?
- ◆ What is supposed to happen but does not?
- ◆ What is the impact of this problem on the following stakeholders, components and/or requirements of the project?
- ◆ What is the ultimate effect that you are worried about in this situation?
- ◆ What issues and challenges are you experiencing regarding this problem situation?

The previous questions or combination of questions are invaluable in the following project situations.

1. **Determining project expectations at the outset of the project** – The more specific we can be with a requirement/expectation the better it would be. For example, the businessperson tells you they need to “have access to the application at all times.” You can be more specific by asking that same person to explain to you what they mean by “having access at all times?” The answer to this question will be more revealing and create insight into what their actual expectations are.
2. **Determining actual project deliverables** – In deciding what this project would deliver, it would also be a good practice to decide what it would not deliver. In other words what is not included in this project. For example, the deliverable might be to “provide a monthly market report on sales closed.” It will not provide any information on sales that did not materialize.

“We normally say, ‘**The devil lies in the detail**’ and that is the exact same impact if you are not being specific in what you do in project management or even more precisely when you are managing projects.”

3. **Being specific in your Work Breakdown Structure (WBS)** – Project staff typically would cluster certain similar activities together and then later forget which activities are actually represented in the written task or activity. The more specific the activities the easier it is to determine RACI, the more accurate the cost estimations, the easier it would be to modify tasks when something goes wrong and easier to monitor and control the execution of tasks.

4. GET “CLOSE” TO YOUR MOST IMPORTANT STAKEHOLDERS

Do you even know who they are and why they are important to you?

It is a serious mistake to assume that all resources allocated to your project are equally motivated to see your project becoming a success. It could be possible that a critical resource does not have any insight or interest in your project whatsoever and they are one of the resources to deliver a critical component at a particular time. There are two components important here. First, **you need to know who your resources are and you need to align them** in an appropriate way.



Second, you need to make sure you **know who are your important resources that could make or break the success of your project**. We will discuss the importance of both and what you can do to “arrange” this for your own project.

Let’s talk about the Resource Alignment Matrix first – This is a matrix that would inform you about anomalies in your resources. Anomalies such as someone that could have a devastating impact on your project, but nobody is aware of this situation. Let’s look at an example of this to explain how you could determine these GAPS.

Let's say John is your internal person from the DNS department that would be required to complete and implement your DNS package for you. You know this is important and you assume that John will do his magic as usual but there is one factor you are missing. Look at the following table:

Project Resource	Type of Activity	Authority Area	Level of Interest	Level of Influence	Priority Indicator	Actions to get Buy-in
John	Do DNS package and install	Type of package	1	5	1	Get John to become member of Project team at that stage of project
Sheryl	Develop email protocol	Email protocol	5	5	5	Already involved

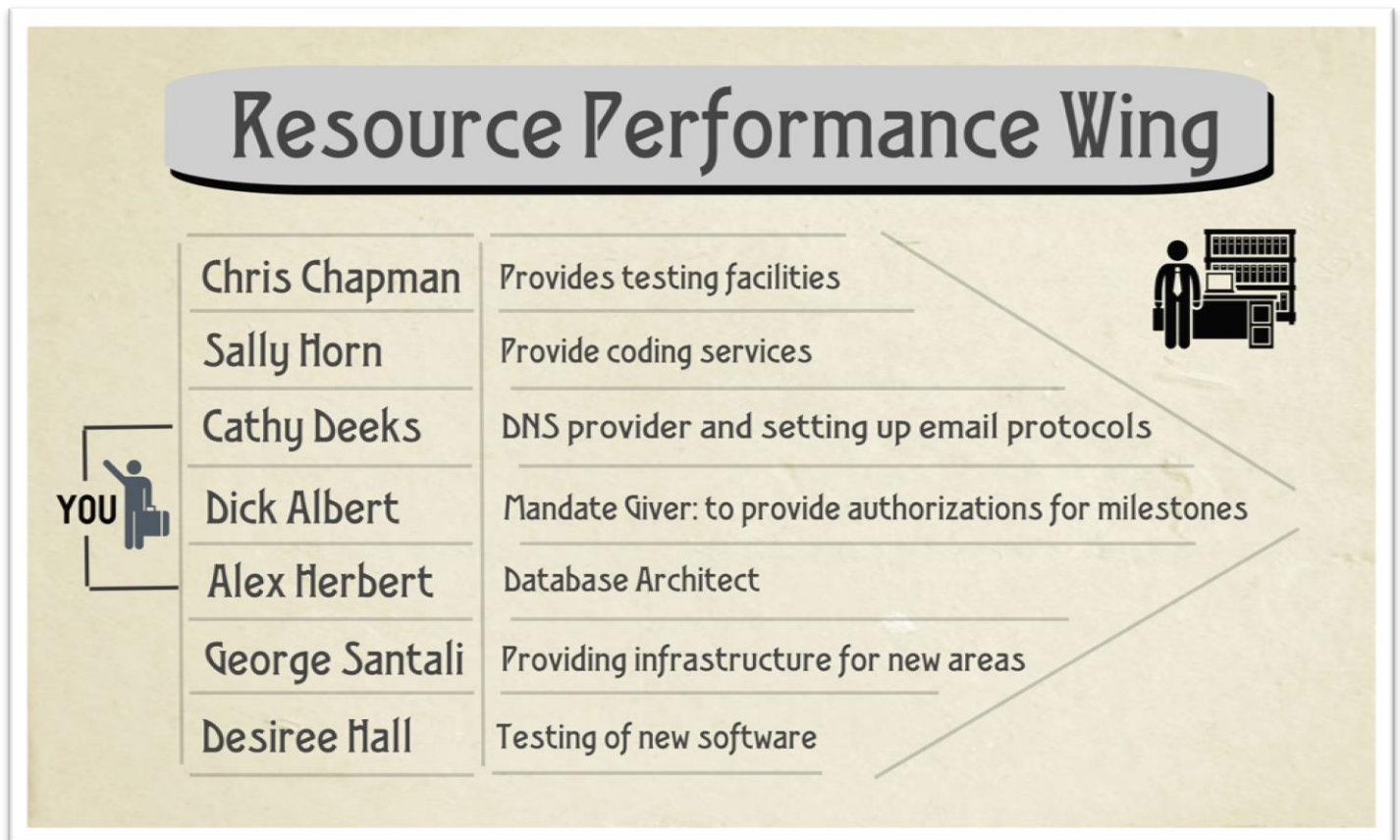
We know John has an important job to do for our project, but John is not involved in our project and he is also not going to be the end-user. John really has no motivation other than doing his job or his reputation. His interest level would be a 1/5, but his level of influence is 5/5. That is a major potential problem and you need to develop strategies to get him "to have skin in the game."

On the other hand you have Sheryl that is an end-user and she would be responsible for developing appropriate email protocols to be ready by launch date. She has "skin in the game" and therefore her interest level would be a 5/5 and also her level of influence is the same 5/5. You do not have to do a special strategy to get her involved, because she is already involved and motivated.

You can evaluate many of the stakeholders or resources in your project just to check their "motivation" status. You'll be surprised what you will find and initiate an excellent way to get behind all of your resources and to ensure an on-time and on-budget delivery.

Resource Performance Wing

The second factor is to look at which of your resources are really the ones you need to get close to and involve at all times. This is the Resource Performance Wing developed by my friend Piet Nieman who worked for a major utility group and used this tool continually to ensure successful completion of all his projects. I acquired this from him and been using it constantly and it saved my bacon on many occasions.



Here's how it works:

1. You list your resources for a **specific window of project performance** and also what services they need to provide. You would mostly get this information from your Resources Alignment Matrix.
2. Put your **most important resources** closest to you as you are the Project Manager.

3. The **Mandate Giver** is the person that would provide authorizations to most of your milestone activities.
4. Arrange the rest of your resources in order of importance to you as you see it at that stage of your project. This gives you a visible rendition of all your resources in level of importance. Looking at the diagram it means that you need to spend quality time with at least Cathy, Dick, Alex and John. Quality time means the following:
 - a. Include and involve them in all your communications.
 - b. Ask for their inputs even if they are not the SME to answer your questions.
 - c. Use them as sounding boards and get their inputs on a regular basis.
 - d. Use them to influence others that you might have potential difficulties with.

The **Resource Alignment Matrix** and the **Resource Performance Wing** will help you with your recognition of important resources and not overlook any blind spots that might be there with a specific resource.



5. SCOPE CREEP

The biggest excuse in Managing Projects; How to avoid this pitfall



Whenever something goes wrong in a project's performance it is often blamed on "scope creep." Scope creep has become such a familiar feature in project management that it is mostly accepted as the correct reason and even worse, being accepted as a fact of project life. The prevailing belief is that it cannot be helped, it is "beyond the PM's control," and therefore is part of the necessary evil in managing projects. Not True!

To decide what to do about this scope creep excuse we need to first investigate the reasons why we are experiencing scope creep. We will make suggestions what could be done to minimize the probability of experiencing the scope creep situation. The most common reasons for experiencing scope creep include the following:

◆ **Poor initial alignment of stakeholder expectations** – We dealt with this in section one. This is when the initial requirements or expectations are not actively discussed, detailed and aligned with the end-user and/or customer. We are undertaking this project to satisfy a customer need and if not met and completed we will not be able to earn revenue with this service.

- ◆ **Poor initial scoping of the project** – The customer agreed to expectations and requirements, which are interpreted in project deliverables that would be summarized by the project’s scope. If we do not understand the exact implications of the customer needs then the chances are poor that we would be able to interpret this in appropriate deliverables. This results in a poor scope that will have to be modified as we progress through the project.
- ◆ **Poor monitoring and control** – If you were not keeping your finger on the pulse, how will you know that you need to take action? Taking action could avoid additional actions and hence avoid pressure on scope requirements.
- ◆ **Poor “feedback loop”** – Not getting feedback in time or not getting feedback in specific enough details could also put pressure on the initial scope. Most project issues can be resolved fairly successfully if detected and action taken in time. Getting into the habit of identifying GAPS with the project requirements early could save you and your project a lot of time, effort and rework.
- ◆ **“Poor speak”** – This is all about being specific and again this was covered in detail in section three. Specificity plays a major role in all of the bullet points above. Not verifying in detail what has been communicated can leave room for personal biased interpretation, which is not good.
- ◆ **Legitimate reasons** – This is where we had technology improvements or the scope of the project genuinely altered due to market or condition changes.

So, how do we suggest you tackle this issue of scope creep successfully? Firstly, we suggest that you do not freak out when it happens, but immediately try to find the underlying reasons why it occurred. Knowing what caused it might alert you to future similar problems with this same project and you need to treat this instance as a warning sign of what is to come. This should be the ideal time to fix the problem and to avoid more serious potential future scope creep situations.

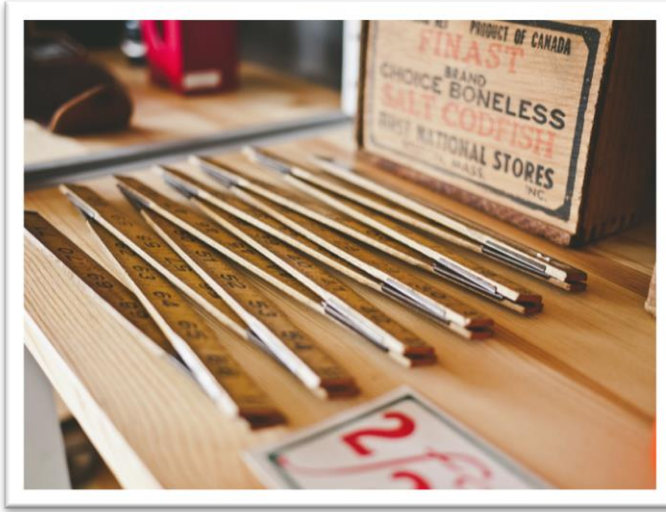
We would suggest the following strategy:

1. **Based on past experience it all starts with having vague, ill defined or poorly stated client/end-user expectations.** Do not use a “junior” person to formulate the client expectations, because they do not always have the necessary business experience to interpret what the business meant by a specific requirement. You might think that this is going over the top, but we can guarantee you that you will “thank your stars” over and over as you progress through your own project. This is going to save you many iterations of the project scope.
2. **Once you have all the expectations you need to translate this into project deliverables.** This is not easy to do and we suggest you do this in small teams with a combination of stakeholders until you have your final list. This final list should state emphatically what is not included in these deliverables. There is nothing more clear than stating what will not be delivered.

Scope creep has become such a familiar feature in project management that it is mostly accepted as the correct reason and even worse, being accepted as a fact of project life.

3. **In the midst of all this is the nagging requirement of being as specific as possible.** This is true for all the points above. The listing of expectations and project scope deliverables to the way the internal project communications are handled needs to be highly specific.
4. **Create an effective feedback loop** that ensures you and your staff have their “ears to the ground” all the time to gather project intelligence. Nothing can be as effective as being proactive. This will also ensure that if anything does go wrong, it is contained and dealt with quickly and effectively.

6. ALIGNMENT, ALIGNMENT AND ALIGNMENT



This is the most misunderstood concept in managing projects.

Whenever we get involved with a team to help them to rescue their project, we quickly encounter the term “not aligned.” I mean this happens 100% of the time, which means there is always an element of misalignment. Here are a few examples:

- ◆ **Misalignment of the customer’s expectations** to those of the project team. In some cases, the project manager works as a middleman between the customer and suggested vendor, and the vendor may not meet the customer’s expectations.
- ◆ **Misalignment of resources** – this is where you need a specific experienced resource, but you’ve been provided with a junior resource.
- ◆ **Misalignment of the budget** with the deliverables of the project, mostly because the deliverable was not clear, and the estimation was totally inadequate.
- ◆ **Misalignment of work breakdown activities** with the project deliverables either because the deliverables were not understood or were not specific enough.

There is bad news and there is good news regarding alignment. The bad news is that “alignment issues” are a major cause in project failures. The good news is that they are fairly easy to fix. **The fix lies in the alignment requirement to be adhered to from the outset of the project.** Unfortunately this requires you to get involved in many additional activities in the beginning of the planning process, but all worth it. In Project Management we have a saying that every hour you spend on careful planning will save you nine hours later in the project.

The definition for alignment is very interesting. It has the following two meanings, which I think are applicable to **managing projects**:

1. **Arrangement in a straight line, or in correct or appropriate relative positions**, like the act of aligning parts of a machine or parts of a project. (I’ve added the section “parts of a project” because I think it is highly relevant in that way)
2. **A position of agreement or alliance**, which I think is what it is all about in projects.

*I would then summarize it as,
“Alignment is an
ACT to align ALL
PARTS of a project
and reach a
POSITION OF
AGREEMENT or
ALLIANCE”*

Salvaging Value from Project Failure



“Misaligned priorities in different organizational units reveal strategic weakness in the organization and can result in optimized performance of the parts at the expense of the overall organization. Misaligned priorities in organizational units commonly result in perverse incentives at the individual level of analysis. Perverse incentives refer to incentive systems that inadvertently provide rewards for behaviors that undermine the organizational strategy.”

-Aaron U. Bolin, PhD, SALVAGING VALUE FROM PROJECT FAILURE, Journal for Performance Improvement, 2012



I would then summarize it as, “Alignment is an ACT to align ALL PARTS of a project and reach a POSITION OF AGREEMENT or ALLIANCE.”

The above definition is significant, because it means you will not get alignment unless there is an act to get all parties aligned and it is not good enough without the agreement of all the stakeholders. This tells us that you actively will have to get stakeholders together to discuss, iron out and agree on all the factors mentioned above.

You might rightfully ask, “How would we execute the above with our clients?” That is a fair question and the following would be our guidelines to achieve the “ACT” and the “AGREEMENT” portions of the alignment definition:

1. Once the initial expectations were gathered from all the stakeholders we would **decide with the project sponsor and project manager which stakeholders to gather in which meetings** to discuss final deliverables and to get alignment at the same time.
2. **During the meetings GAPS are identified, ill-defined requirements are clarified and the final project deliverables are crystallized.** We go one step further and we then get all the stakeholders to agree which deliverables are minimum requirements (non-negotiable) for the project. We identify and get agreement on these and also identify which of the remaining deliverables are highly desirable and which are just “nice to have” requirements. The value of knowing this up-front is priceless!

3. **The project team will determine the work breakdown structure** and will use the various project management tools to itemize what needs to be developed to populate the project with the necessary specific information. Again it would be worthwhile to go back to representatives of the previous stakeholder meetings to get feedback, discuss and problem solve issues that might have been picked up at that time.
4. We are pro-active in these meetings whereas **we also look at “what if” scenarios to prepare all the stakeholders psychologically** for what might have to happen if the “what if” scenario occurs. This way we have a good idea of options when we do run into problems with a project.



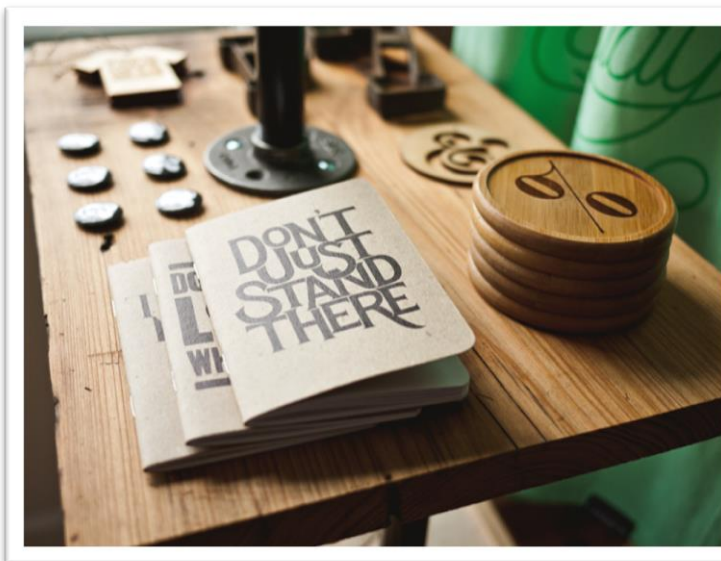
The ultimate aim is to get alignment and buy-in for the deliverables of the project. If there are legitimate reasons for a scope modification we already have a good idea of what could be done to deal with it effectively and with the approval of all the important stakeholders.

Remember what we stated earlier, “One hour of good planning will save nine hours of work later.” This might sound insignificant, but imagine if you spent two weeks with all these meetings. It would save 18 weeks of work later in the project and that is highly significant!

7. ARE YOUR PROJECT MANAGERS GOOD PROBLEM SOLVERS?

It does not matter how good your planning is or how well you've put your project plan together, there will always be unforeseen circumstances that need to be resolved!

The problem solving process is normally started when any of the following situations arise:



- ◆ You have **many issues** currently and you do not know where to start, or
- ◆ You have **one ill-defined and/or performance issue** and you do not know where to start, or
- ◆ You have a **technical deviation from standard** and you need to find the cause of that deviation before you can make any progress, or

- ◆ You need to **find a solution** for a project situation and you do not know what to do, or
- ◆ You need to **make a choice** between at least two options and you do not know which one would best, or
- ◆ You are **faced with a potential risk** and you do not know for sure how to mitigate it successfully.



Why are some companies more successful than others?...

...We don't think it's a mystery. We think it's the quality of thinking in the organization. They come up with innovative solutions to their problems more often than others.

-Dr. Charles Kepner





The aim is to use a problem solving process that provides you and your team with appropriate templates and tools to collectively, and if needed, virtually solve some problems together.

Good problem solving practices have the following characteristics:

1. Include the information sources closest to the problem being experienced. It is not about the “best brains” but rather a case of the “most appropriate” brains.
2. Information generated is made visible and recorded to help the team to arrive at a commonly supported answer.
3. Inputs through collaboration are actively promoted.
4. Ideally an objective facilitator is used to manage the problem solving process and its inputs.
5. The aim and objective is to reach consensus on all aspects to foster buy-in and commitment for implementation.

Project Management should not be a jail sentence. If handled correctly with the correct training, excellent project management is one of the few ways to prove yourself and gain recognition in the organization.

8. SUMMARY

One concept comes to the forefront when thinking about the successful management of projects and that is “common sense.” No one project is the same as the next one and therefore it is important to remember that there are many other skills that could be utilized to run projects effectively.

This e-book is primarily focusing on how to problem solve certain common issues with the worked and proven approaches as mentioned in this book. This surely is not the “be all and end all” of how to manage projects.

We hope you or your team members gleaned value from this eBook. If you'd like more information or need any further information please contact Omnikron.

We look forward to assisting you with your [Training](#) and [Staffing](#) needs.

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