Book Strategic Project Management Made Simple

Practical Tools for Leaders and Teams

Terry Schmidt
Wiley, 2009
Listen now

- play
- pause

00:00
00:00

Recommendation

Have you ever been part of a project that seemed to be an empty exercise in chart maintenance? Terry Schmidt shows you how to avoid that pitfall by designing your project to provide real strategic value to your company. He also provides excellent tools you can use on every project to make sure that its work is meaningful, that your logical design for the project is sound and that you have organized its work in purposeful chunks. Since project management depends on people, Schmidt shows you how to involve your colleagues, team members and stakeholders. He organizes his chapters for clarity and ends them with summaries of the main points. He provides the forms you need, and explains how to adapt and use them. Schmidt illustrates his principles with real-world examples drawn from his long experience consulting with companies and governments. He even throws in some nice humor and a few quite funny cartoons. *BooksInShort* recommends this helpful, thoughtful look at project management. Schmidt goes beyond explaining the right techniques to focus on doing projects in a way that provides strategic value.

Take-Aways

- Think strategically and focus on a project's purpose, not on its tools and charts.
- Give your project a strategic structure by knowing what you are doing and why.
- Check your project assumptions by testing if-then connections. Learn as the project progresses and incorporate what you learn back into the project.
- Multiple projects will align properly only if you carefully point them at the same strategic goal.
- You can use tracking charts, such as the "Logical Framework" or "Logframe," to align the strategic elements of your project.
- Never mistake dealing with problems for managing your project to fulfill its purpose.
- Use only verifiable, meaningful project measurements, not just those that are easy to get.
- Look outside your project to its larger context to find its objectives and purpose.
- The way you "chunk" or segment your project's work will determine the coherence of your team's assignments.
- Spend real effort on managing your project through effective management of people.

Summary

Project Management Is Much More Than Charts

Whether your project is big or small, you can use strategic tools and approaches to manage it effectively.

The most important project management task is to understand exactly what you are trying to do, what success will look like and how you will know you have reached

it.

> "The question of what the project should accomplish and...why it needs to be done, deserves fine-tuned attention because those answers drive everything else."

Avoid six common project-planning mistakes:

1. **Having fuzzy objectives** – When you begin a project without a clear destination you will end up doing a great deal of unusable work.
2. **Working without context** – If you don't know how your effort fits into a larger picture, you probably are working without the ability to make course corrections.
3. **Using the wrong tools** – Use the right tools, not just the easily available tools.
4. **Believing stakeholders don't matter** – No project exists in isolation. Be sure your work has meaning for those who will assess what you produce.
5. **Being too busy to plan** – If you don't take the time to plan well, you will miss deadlines, and you will waste time and resources fixing mistakes.
6. **Wasting people because you lack a plan** – Happy people work well; frustrated people don't. Without a plan, your team will be frustrated. They'll have no idea what to do.

> "Traditional project management focuses on task-level details and loses sight of the benefits projects aim to deliver...conventional approaches perpetuate tunnel vision...when we need...the big picture."

Start your projects correctly with good planning. If you are an executive sponsoring a project, be sure your project leaders understand the strategic intent of their assigned tasks.

Savvy project managers understand how advantageous it is to work on a well-designed undertaking.

Projects with Strong Structures

To gather the information you need to give your project real structure, ask four "critical strategic questions":

1. **What do we need to get done and why do we need to do it?** – You might think this answer is obvious, but as you listen carefully to the responses executives and team members give to this question, you may hear a surprising range of answers. You need to know the "what" and "why" of your project, or nothing else will matter.
2. **What will success look like and how do we measure it?** – Some measurements are easy, but irrelevant, so skip them. Look at what your project is intended to do so you can define success. Then figure out what metrics to use to measure it.
3. **What makes success possible?** – Don't focus just on the elements you control. Look at the larger context and catalog the outside factors you depend upon to succeed. What other influences, such as training and resource availability, can also affect your success?
4. **How are you going to get from here to there?** – With the first three questions answered, begin digging into the project's details. Determine everything you have to do to fulfill its purposes and accomplish each task.

Sometime You Do Want a Chart

The answers to these questions are pivotal to planning your project. You can use them to fill out a "Logical Framework" chart. The "Logframe" is a four-by-four grid showing a project's "objectives, success measures, verification (of those measures) and assumptions" across the top, and the project's "goals, purpose, outcomes and inputs" down the left side. Once you fill in this grid with data drawn from your answers to the four strategic questions, you can compare adjacent boxes using "if-then" conditional reasoning to be sure that all the elements of the project align.

> "Achieving organization excellence is an ongoing process, not a one-shot workshop event."

The Logframe has many applications; at its heart, it provides a solid, logical foundation for framing a project. It can help you structure project evaluations, set a course for team learning and development, and create strategic IT structures and algorithms. However, it is a strategic summary and alignment tool, not a detailed action plan. The time to begin using a Logframe is at the beginning of a project. In fact, the more outside your organizational culture the project is, the more useful the Logframe chart will be in helping you develop a handle on it.

Projects and Corporate Strategy

If your company is working through many projects at the same time, each one should connect to your overall strategy because the projects' end results are likely to feed into each other. You don't want to be like a crew building a tunnel, working from opposite directions, only to find that the ends are far apart when you thought you were ready to join them.

> "A good design, developed and supported by the team, has a much better chance of success than a perfect design developed by a project manager...with only minor team involvement."

Take eight steps to create a logical project plan:

1. Make the context of the project planning clear and the issues explicit.
2. Be sure you've included the project's main players, including stakeholders.
3. Check the context of the project, including all affected business units.
4. Develop a team vision of your goal and a mission statement of how to accomplish it.
5. Constantly seek to improve the value you are adding and how you measure it.

6. Distill your goals into core strategies and analyze them against your metrics.
7. Implement the core strategies to create your project execution plan.
8. Update the plans and follow up; cycle the process again as needed.

Know What You Are Trying to Accomplish

Charging out to solve problems won't lead to a successful project. Use careful analysis to convert each problem into a clear objective. Get to the detailed root cause of the problem. Avoid foggy targets; to get real work done, you must be clear and concise. Create separate objectives for your outcomes and purposes, which are not the same thing. Outcomes are the results of the project's work. Purposes are the reason you want to achieve those results, that is, the impact created when the project reaches its goals.

> "Project management is like juggling three balls – time, cost and quality. Program management is like a troupe of circus performers standing in a circle, each juggling three balls and swapping balls from time to time." (G. Reiss)

List, track and manage each result in terms of what you promised to deliver, when you will deliver it and what resources you need. Carefully analyze your if-then links and challenge every premise to be sure it is worthwhile. Better approaches to your work will pay solid rewards, including a richer fulfillment of each objective and the project's purpose.

> "The three major resources of interest are time, people and assets. A wisely chunked activity list is the starting point for the schedules, responsibility charts and resource budgets."

To find out if you are accomplishing your project's purpose and each of its objectives, determine how you are going to measure results. As you select measurements, describe them in clear sentences and bullet points. Determine how you will verify or authenticate each measure. If you can't truly verify a measurement, it isn't worth gathering. Repeat the process of choosing and writing the measures and verification methods for each project goal and result. Then set the document aside for at least several days. Come back to it with a clear mind and look at it again. You are likely to find things you can improve.

> "Measures are the instruments on your project dashboard, so choose those needed to intelligently guide your project journey."

Never decide on your measurements too quickly. They are very important to your ability to manage the project, so dedicate the necessary time to get them right.

To understand the context or environment of your project, first identify the core conditional assumptions you made when designing it. Determine how likely the events you posited are to happen. What would be the impact on your project if they do occur? What can you do to prevent negative outcomes or to encourage beneficial ones? Assign dollar costs to the negative events and to the methods of preventing them so you can determine what to do. Once you have the right cost-benefit analysis, start working on your project and managing external influences as well as you can, along with making sure it fulfills its purpose on time and in budget.

The "Strategic Action Cycle"

Use a "Think-Plan-Act-Assess" learning cycle to create a logical path for managing your project's iterations. Establish milestones with their own evaluation processes. Hold periodic replanning and evaluation sessions to ensure that your project remains on track – and on the right track – to meet its deadlines and objectives, and to fulfill its purpose.

The Role of "Chunking"

Divide your project work into segments at the very beginning, but do it with careful thought. How you "chunk" your work will determine its flow and will shape your results. Every project is concerned with time, people and assets. Express these concerns in terms of "schedules, responsibility and resource budgets." Give each chunk a logical, descriptive name and include it in your tracking.

> "Purpose measures are the most important...that's your primary aiming point, the what-should-occur result you expect after you deliver what you can."

Set up a "Responsibility Chart" to coordinate project tasks and assign them as specific jobs. Describe final jobs in narrative form, setting out the work in progressive levels of detail. Make detailed descriptions of immediate work, tightly summarized descriptions of a broader view of the project, and something in between for mid-view program management. Focus on the details of the next piece of work you need to accomplish.

> "If we manage inputs, then we can produce or deliver outcomes. If we produce or deliver outcomes, then we will achieve a purpose. If we achieve a purpose, then we contribute to an important goal."

Be ready to modify your chunking as your project progresses, and as you re-evaluate and assess your results. Keep this process human and positive by celebrating the accomplishment of project steps and involving your staff in successes.

Projects and People

Unless your project is very small, you will need to work with and through other people. As the project manager, you need to understand your people as well as their tasks to ensure that you create good matches between jobs and skills. If you manage people so that they succeed and then celebrate those successes with them, you will get a lot more done than you will if you manage them by correcting mistakes. By centering everyone's work on alignment and strategy, you can get all the participants to talk about the same things in the same language. This will powerfully support your team-building efforts.

> "We sometimes equate project management with the visible planning artifacts – timelines, budgets and reports."

Keep the planning process going, and change your tracking and strategy documents as needed. In the end, the process of project planning is more important that the actual documents you create. Do not become so obsessed by what is on the page that you take your project down a blind alley. Assess the support of your stakeholders, so you know if you need to fill in gaps with them. Try to help them feel invested in your project's success.

"But the heart and soul of every project concerns people – their relationships, skills and ability to work as a team."

Remain self-aware. Keep an eye on your personal energy for the project, and your emotional highs and lows. Continue to sharpen your interpersonal abilities. Emotional intelligence (EI) is a powerful indicator of project management success. If you have high EI, you will be better able to assemble a team, manage others, gain their support and help the team through tough times. You will understand when to make adjustments to keep your team motivated and performing at a high level.

"Call your team to the harmony of excellence and enjoy the tabernacle choir sounds of their harmonized efforts."

No matter how serious the purpose of the project is, ensure the daily work isn't drudgery and keep the team's mood light. People sag under too much weight each day.

Real World Rather than Theory

Take these steps to provide your project with a big return:

- Keep your strategic plan relevant and up-to-date.
- Break down project silos by building teams across them.
- When performance lags, refresh the workload by reinventing your team.
- Use your project to support the company's strategic marketing and sales programs.
- Continually improve each process so it provides a better output.
- Focus on strategy and purpose in your decision and recommendation process.
- If a hot potato shows up in your project, bake it by defining the issue, transforming it into an objective and designing your solution.
- Use brainstorming to break through the logjam if a piece of your project gets stuck.
- Make sure your people have a good place to go after the project ends.

About the Author

Terry Schmidt is a certified project management professional (PMP with 30-plus years of experience. He teaches project management at UCLA and the University of Wisconsin.