A FranklinCovey Title

"The ultimate blueprint for 'unofficial' project managers. You'll go from amateur to adept in seven easy chapters."
—JAY WILKINSON, founder and CEO of Firespring

PROJECT MANAGEMENT FOR THE UNOFFICIAL PROJECT MANAGER

UPDATED AND REVISED EDITION

Kory Kogon | Suzette Blakemore

Praise for *Project Management for the Unofficial Project Manager*

"If you are suddenly thrust into the role of project manager, this book offers a refreshing solution. *Project Management for the Unofficial Project Manager* leads the reader down a path of principles—*Create Value*, *Lead People*, and *Manage Processes*—while providing practical, easy-to-use tools. Yes, this book will give the unofficial project manager a healthy boost of confidence . . . you got this!"

—Bill Yates, PgMP, PMP, PMI-ACP, Executive Vice President at Velociteach

"*Project Management for the Unofficial Project Manager* gets to the HEART of a challenge so many now face in the workplace—the need to ORGANIZE projects, on the fly, without training, to lead their companies to a new future. This is a GREAT book—Exceedingly Practical, Easy-To-Read, Personable, and Hits the Spot—you'll take control fast with the knowledge in these pages."

—Julie Morgenstern, *New York Times* **bestselling author of** *Time Management from the Inside Out*

"*Project Management for the Unofficial Project Manager* is the new benchmark for real & truly effective project management. This is a must-read . . ."

—Gerry Aquino, Organizational Development and Learning at Össur Americas, Inc.

"*Project Management for the Unofficial Project Manager* is the best business improvement book that I have ever read. This book will become the guide for all of our future projects. We are already seeing massive

improvements from the work sessions that Jim Wood conducted at our company, and this book will definitely enhance those improvements. Any person who follows the advice in this book will find a tremendous, positive impact on their career."

—Tim Rancourt, president of Engineering and Manufacturing at Northern Tool + Equipment

"Finally! A project management book that acknowledges and supports the 'people' part of projects. Too many times we are focused on the work without recognizing that it's people and relationships that have the biggest impact on project success. Practicing the Four Foundational Behaviors will help every 'unofficial' project manager engage their team."

—Deanna Carrera, director of Leadership and Learning at First Things First

"In this age of lean corporate headcount, everyone, no matter what their title, is required to fill the role of project manager. And the new book, *Project Management for the Unofficial Project Manager*, covers the core areas that any project professional needs to be successful. Additionally, FranklinCovey's work session gives you simple, straightforward, video-driven content that is easy to understand and put into practice. The book can also serve as a reinforcement tool to remind work session participants of their learning. Both are invaluable resources to any organization interested in improving efficiency and outcomes."

—Robert Fitt, senior director of Human Resources at Broadcom Corporation

"With *Project Management for the Unofficial Project Manager*, FranklinCovey has put project management in the hands of everyday leaders. The book provides practical solutions and a straightforward process to craft shared vision, realistic timelines, and successful deliverables. If you are involved with executing projects of any size, you owe it to yourself and your team to read this book."

— Kenneth Johnson, director of Training and Development for the State of Colorado

"Sometimes we think of projects as large capital expenditures, but often all of our work is an 'unofficial' project, and too often, we find ourselves ill-equipped to manage the process to a successful outcome. *Project Management for the Unofficial Project Manager* ties together a process that everyone can use for project work, as it is for all levels of an organization. One great takeaway from the book is, 'You must clarify a shared and measurable set of expectations.' Without this, a project has little chance of success, because projects are really all about people and their expectations."

—Bonnie Stone, Centralized Learning and Development Manager for the Central Arizona Project

"In today's environment, managers need to lead and complete difficult and multiple projects with limited resources. Authors Kogon, Blakemore, and Wood outline down-to-earth examples and techniques, essential to be successful in this day and age."

— Michael Fung, former CFO of Walmart U.S.

"In an era where collaboration is key, where everyone has a 'real job' to do, in addition to the projects that they are a part of, this book may actually save lives or certainly improve them! People are pulled in so many directions that this book enables the project manager to be highly organized and build authority and credibility. A well-organized project manager is a gift to any organization and will surely deliver extraordinary results."

— Kevin K. Cushing, former CEO of Alphagraphics Inc.

PROJECT MANAGEMENT FOR THE UNOFFICIAL PROJECT MANAGER

UPDATED AND REVISED EDITION

Also by Author

5 Choices: The Path to Extraordinary Productivity by Kory Kogon, Adam Merrill, Leena Rinne

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UPDATED AND REVISED EDITION

KORY KOGON
AND SUZETTE BLAKEMORE

A FRANKLINCOVEY BOOK

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BenBella Books, Inc.

Dallas, TX

BenBella Books, Inc.
10440 N. Central Expressway
Suite 800
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CONTENTS

INTRODUCTION: SO YOU'RE AN "UNOFFICIAL PROJECT MANAGER"?

IN 1999 NASA PROPOSED SENDING into orbit a new ultrahigh-tech telescope that would be able to see into the past nearly to the beginning of the universe. It would photograph stars and galaxies unimaginably distant from Earth and more than 10 billion years old.

NASA estimated that the James Webb Space Telescope project would take eight years to complete and cost a billion dollars.

But in the end, it took *twenty-two years to complete and cost $10 billion*.

Why was the project, according to the *New York Times,* "plagued with enormous cost overruns and delays"?

Of course, many technical problems had to be solved. But project management was also a problem.

The *Times* reports that expensive human errors caused a lot of delays. "The telescope's propulsion valves were damaged when engineers used the wrong solvent to clean them. Dozens of screws that fastened the telescope's massive sunshield came loose during vibration tests. And faulty wiring sent excess voltage into the observatory's transducers." Sounds awful, doesn't it?

Then there were team members who just didn't do their jobs. Many errors "should have been detected by the inspector, who did not inspect."[1]

Ultimately, the Webb Telescope was launched, and it now sends back images of deep space that take the breath away. But it should never have taken so long and cost so much.

WE ARE ALL PROJECT MANAGERS NOW

It's odd to think that loose screws and the wrong cleaning fluid could throw such a massive project off course. But project management has never been easy, and the size and complexity of the project make it that much harder.

We assume you aren't in charge of a project that will cost multibillions of dollars and take many years to complete, but you *are* going to manage a project of your own now—or you wouldn't be reading this book.

You're not alone. "We are all project managers now," says prominent project expert Antonio Nieto-Rodriguez. "Soon we will no longer have job descriptions. We will have only project descriptions." Why? Because people are turning more and more to project work to deliver value for their customers. Your project does matter, or you wouldn't be doing it. Since your organization is investing time, money, and resources to get it done, the project likely means a great deal. So it better be worth it.

The Project Management Institute (PMI) says, "The most important aspect of project management is delivering business value to the customer."[2] That might seem obvious, but many projects—in fact, most—fail to do that. Of the millions of projects undertaken in the worlds of business, education, and government, nearly two out of three will never deliver value to a customer.[3]

So you have reason to be apprehensive about taking on the role of a project manager.

For one thing, you were probably never trained for that role. By far, the majority of projects are managed by "unofficial project managers"—and you're likely one of them. Most knowledge workers are already managing projects under the radar—everything from micro-projects like organizing a luncheon to extremely large macro-projects like sending telescopes into space. They deal with kickoff meetings, deliverables, and "milestones" every day, whether they are called project managers or not. And they're doing it by the seat of their pants.

Project management is an essential professional skill for everyone. As project management expert Joy Gumz says, "Operations keeps the lights on, strategy provides a light at the end of the tunnel, but project management is the train engine that moves the organization forward."[4] Adding project management to your portfolio of skills makes you an even more valuable professional.

Although the project management profession has collected a huge body of knowledge on the subject and devised complex computer applications for it, you'll find the basic elements easy to grasp. You don't need to make the job more complicated than it is. One project management pro explains that if you keep the simple things straight, you'll be okay. He says, "Most complex projects fail because [the managers] forgot the very simple things, not because they couldn't deal with complexity."[5]

There are literally hundreds of books about project management. Most are written in the official, formal voice of "real" project management. They are full of intimidating, complicated processes and specialized language.

So you pick up one of those books, read a little, then slowly become overwhelmed. Finally, you just panic, throw the book across the room (or delete it forever), and just continue to wing it.

But this book is different. Although it's based on the best thinking about project management, this book gives you the few principles and tools you really need to succeed as an unofficial project manager.

The principles here are distilled from the *Guide to the Project Management Body of Knowledge* (*PMBOK*), seventh edition, produced by the PMI. *PMBOK* runs to hundreds of pages and describes project management in fine detail. We have narrowed down the robust principles and processes in *PMBOK* to a few essentials and added our own insights about what makes projects successful.

The apparatus of traditional project management can overwhelm a project team, especially if the leader insists on doing projects exactly by the book. The towering discipline of official project management can scare people. In fact, the famous Agile Method of project management was born in reaction to the dogmatic approach taken by some traditionalists. But ironically, even Agile has taken on a lot of complexity.

You don't have to become the "Project Meister" of the "only true process" everyone must obey or lose their heads. At FranklinCovey, we've distilled the best ideas from the world of project management to make them usable and practical for all of us "regular" people who aren't pros. To date, we've taught thousands of unofficial project managers a basic method for project success, and now we're sharing what we've learned with you.

A FranklinCovey client, a director in his organization's Project Management Office, has this to say about our program and tools: "In the last year our organization has overspent on projects by $2.5 million. And the reason is not the 'Big P' projects. The 'Big P' projects have plenty of oversight and corrective action when needed. The greater challenge is the everyday 'Small p' projects. While these projects are small in scope, there are hundreds of them—and no one is paying attention. The big payoff for conducting Franklin-Covey's program *Project Management for the Unofficial Project Manager* is not just to get project success, but to save millions of dollars!"

WHY THIS BOOK

This book is for those of us who are paid to think, innovate, and create. It's for those of us who are asked to "get 'er done." It's neither a comprehensive textbook nor a reference guide. It teaches you the essentials of managing projects and provides basic tools in a real-world context. We have taken the complex world of project management and made it simple, clear, and easy to implement immediately. You'll be riding the wave of the new project economy if you learn these skills.

Interestingly, we've found that these methods and tools have positive side effects. We have applied them to other things we do, even outside work—at home, at school, at all our activities. We live in a chaotic, uber-paced, information-saturated environment, and the ideas in this book have helped us manage not only our projects but also our time and our lives.

WHAT TO EXPECT

This book is organized around a process that takes best practices from both traditional and Agile project management. Each step includes various tools that will help you scope, plan, and execute your project with excellence. Each step includes Application Challenges so you can practice using the tools. Remember to check your learning at the end of each chapter.

Finally, this book is about going from good to great in both your professional and personal lives. It's about learning to do your highest-quality work—whether you're taking on a professional project or planning a perfect wedding. If you consistently practice the principles in this book, you can avoid most of the scars that project managers usually get along the way and repeat success after success.

CHAPTER 1

THE JOB TO BE DONE NOW

HEDDA RISING GRUMBLED ALL THE way to her boss's office that day in June. She feared her career was about to end. Despite her best efforts, regardless of everything she had tried to do, the organization had lost out again, and she figured she was going to have to take the brunt of it.

When she arrived, her boss, Tesman, and several colleagues were hunched over a laptop screen shaking their heads and groaning softly.

"Nervling beat us this time," Tesman said, straightening up and giving Hedda a quick handshake. A respected pharma professional from Turkey, Tesman knew her stuff and was frustrated at the slowness of Lettal's processes. "Nervling got to market first, and we will be the 'also-ran'—if we ever get to market at all."

"We'll get there," Hedda sighed, "but there's still a long trek ahead of us."

"And every month we aren't in the market, we lose a million in revenue." Tesman drove the situation home.

As director of regulatory affairs at Lettal Pharmaceuticals in Oslo, Hedda was responsible for getting the firm's new drugs approved. Any new medicine had to be licensed by the authorities before it went on pharmacy shelves, and Lettal's latest creation—a migraine reliever—was stuck somewhere unapproved in the maze of a government agency. Stuck for

months—generating no revenue for the organization and relieving no migraines.

Meanwhile, competitor Nervling had raced through the approvals process with a similar migraine treatment. Being second in the market did not bode well for Lettal.

Hedda was a scientist, not an administrator, but she had a good relationship with the drug-approvals people in the government, so she had been put in charge of getting those approvals.

But it wasn't working. This was the third time the agency had delayed a major Lettal product release. Hedda figured the third time would be the last time—for her.

As the others floated back to work, Tesman folded her arms, sat down on her desk, and looked hard at Hedda. "On average, the agency approves new drugs within about seven months. With us, it's more like twenty-two months. Our products are as good as anyone's, but we get left in the dust too often."

Hedda figured her job was in free fall.

But Tesman had a different idea. "Hedda, you can solve this. We need a project dedicated to speeding up approvals. Could you take that on?"

"Of course," Hedda said, swallowing awkwardly. Brief panic gave way to mere overwhelm, and she wished she could go back to the lab, look at tissue samples under a microscope, and eat her lunch alone. But now her life had abruptly changed.

She was a project manager.

In the last century most people did a certain specified job that stayed more or less the same until they moved ahead or moved on. The boss judged them by the book. Customers waited submissively until the corporation or the government or the school gave them not what they wanted but what they were going to get.

Things have changed. Customers want what *they* want. We are seeing more frequent organizational transformations, faster development of new products, quicker adoption of new technologies, and so on. This is a global

phenomenon. In other words, we must be nimbler and far more responsive to customers than we used to be. "Doing the old job" isn't enough anymore. Today, to get what they want, customers just look at their phones and say, "Give it to me now." "Fix it now." "Cure my headache now." "You're telling me I can't get my orange squeezer until tomorrow?"

This world isn't patient enough to wait for you to "do your job." The job it wants you to do is to satisfy its needs and wants *now*.

And that was Hedda's problem. Up until today, her job, according to the official description, was to "ensure that all government and organization regulations were met, including complying with industry regulations, both external and internal, developing new policies, and training employees."

Hedda was okay at doing all that. She saw herself as a cop, patrolling around and making sure nobody broke the rules. That job was not going away.

But now on top of that she had to *make things happen* (that's what project managers do). She had to figure out how to get a little tube of chemicals onto a drugstore shelf in a lot less than the two years it was taking now.

Most of us are now Heddas, or soon will be. We live in a project economy where people want *value*, and they want it right away. We hear that "by 2027, some 88 million people around the world are likely to be working in project management, and the value of project-oriented economic activity will have reached $20 trillion."[6]

You're probably one of those 88 million people who were never trained to be project managers. But like Hedda, you are—or you soon will be—an unofficial project manager.

THE "BIG WHAMMY"

So most people are doing projects now. But a Harvard study shows that only 35 percent of the projects undertaken worldwide succeed—which means we're wasting a lot of time and resources.[7]

"While project management experiences a boom," the experts say, "projects tend to confront, over time, a multiple 'whammy' of time and cost

overruns, business-case failures, stakeholder disappointments, and sustainability shortfalls."[8]

In other words, too many projects take too much time, cost too much, turn out to be useless, frustrate everybody, and make the world worse. That's a "big whammy."

So it's natural for Hedda to be a little fearful. After all, she doesn't know how to manage a project. We could tell her to "chill out," but it wouldn't make the big whammy any less real. She needs the skills to get the project done on time and on budget, provide value, satisfy people, and do it again and again.

If you've quietly slipped into the role of unofficial project manager, you know you're fighting project failure every day as you try to push through to a deadline, save a budget, or keep people (or yourself) from messing everything up.

WHY PROJECTS FAIL

Let's understand why projects fail. According to the respected Project Management Institute (PMI has a half-million members in 208 countries), organizations without formal project management processes fail much more often than companies that follow a process. But even those with processes fail much of the time. Here are some common reasons for failure:

- Unclear outcomes or expectations ("Why are we doing this?")
- Lack of commitment or support from leaders ("Okay, go ahead with it, I guess . . .")
- Unrealistic timelines ("We need this yesterday!")
- Lack of or mismanaged budget ("You need *how much* more money?")
- Competing priorities ("I've got to take care of my other job today.")
- Unrealistic resources ("What could you do with half this budget?")

- Politics ("We can't let Enki's department get the better of us.")
- Lack of a big picture ("A few loose screws can't make that much difference, can they?")
- Poor planning ("Don't overthink it. Let's get started already. We know what to do.")
- Lack of leadership ("Who's in charge here, anyway?")
- Changing standards ("So they want this new car to go forwards *and* backwards?")

Do any of these phrases sound familiar? Everybody's facing the same issues. Failure is expensive—whether you're in charge of a project costing multimillions or just thousands.

And there are costs to you, too. People who fail are not happy. Your morale drops, you get disengaged, and your confidence and even your job might be on the line. But this book can give you hope. Unlike the many books on project management that drown you in a dense sea of details, we give you a handful of principles to live by that steer you to success. Principles, said the late Stephen R. Covey, are "rules or laws that are permanent, unchanging and universal in nature."[9] The principles of successful project management will always work for you, regardless of the process you use or the situation you're in. One professional says, "Whether it's a $50,000 study or a $30 billion 'giga' project, the basic tenets of project management should not change."[10]

TO SUM UP

In short, projects rule. People everywhere are quietly slipping into the role of unofficial project manager, trying by their wits to get through to a decent finish. It's often like trying to fly a plane without flying lessons—the likelihood of a big whammy is high. But this little book, based on established project management principles, can guide you across the terrain of your project to a nice finish.

CHECK YOUR LEARNING

- Why is it true that “we are all project managers now”?
- Why do nearly two-thirds of all projects fail to meet their goals?
- “Whether it’s a $50,000 study or a $30 billion ‘giga’ project, the basic tenets of project management should not change.” What is true about this statement?

CHAPTER 2

PRINCIPLES OF PROJECT SUCCESS

THE THREE GOVERNING PRINCIPLES OF successful project management are:

- Create Value
- Lead People
- Manage Processes

These principles sound simple, but they are profound. They add up to the success formula of any project:

CREATE VALUE

It's a strange world, but often projects are called successful if they end on time and stay on budget. Oddly enough, achieving an important, worthwhile,

or useful outcome is rarely mentioned!

It's as if you were to make dinner on time and on budget but serve up lousy food nobody wants to eat. But you could still claim, "My project succeeded!"

Obviously, timeliness and cost-effectiveness are important, but a good project manager is going to prioritize a good outcome over everything else. Highly skilled project teams can and do produce rubbish—in fact, according to the Harvard study mentioned in the previous chapter, they do so about two-thirds of the time.[11]

So what are they missing?

The best measure of project success is whether end users are happy. Those people might be executive sponsors, customers, colleagues, or the family at dinnertime. Whoever they are, your top priority is to please them and ensure the project achieves its intended organizational outcome.

This principle may seem obvious, but based on the known project failure rate, it gets lost somewhere in the tangled wilderness of process management.

For many years, *PMBOK* attributed project success to "process compliance;" that is, getting the process right. Eventually, however, a group of influential experts on project management rebelled and issued the famous "Agile Manifesto," in which they declared: "Our highest priority is to satisfy the customer through early and continuous delivery of *value*."[12]

The latest edition of *PMBOK* (the seventh) now concedes that value is the "fourth" basic principle of project management. To provide value, it says, managers must "continually evaluate and adjust project alignment to business objectives and intended benefits and value . . . defined in quantitative and/or qualitative terms."[13]

But what *is* "value"?

In business, *quantitative* value is usually defined in terms of return on investment (ROI) and/or the net present value (NPV) of the investment in the project. There are well-established formulas for projecting ROI and NPV, which we won't go into here. But you definitely need to do this kind of analysis in the scoping phase or get experts to do it for you. Often, quantitative value is what key stakeholders care most about.

Qualitative value goes beyond the financial numbers. It's a little harder to measure, but no less critical. It's often defined in less tangible terms—increased brand awareness, market share, customer satisfaction, educational results, market trust, and so forth.

In simple terms, as project manager you must constantly keep in the forefront of your mind *why* people care about your project, *how much* they care, and how your project aligns with the larger vision or purpose of the organization. We say value is not the fourth basic principle of project management—it's the first. As expert project manager Elizabeth Harrin says of *PMBOK*'s new list of principles, "I wish this one was higher up the list. If projects don't deliver value, what's the point of them?"

"However," she goes on to say, "we have to determine what 'value' means, and it's going to look different for every project."[14]

How do you do that?

We'll show you how. The tools we provide in this book will ensure that you create value as a project manager. If you use these tools right, we guarantee that you won't be doing dumb things on time and on budget.

LEAD PEOPLE

What's been your experience with project leaders? Or leaders in general?

Stephen R. Covey was fond of saying, "Manage organizations, lead people." You may have worked with people who were good managers but poor leaders. Management is "the coordination and administration of tasks to achieve a goal."[15] But leadership is more than that, as we all know.

Your role as project leader is to inspire people to follow you and the project management process willingly and enthusiastically. You've heard the fable of the goose and the golden eggs—about the impatient farmer who killed the goose to get all the eggs and ended up with nothing. In project management, value is the golden egg, but the project team is the goose.

As a project leader, you'll want to find the golden goose and keep it happy and creative. You won't want to abuse it, overwork it, and burn it out.

"But I'm not a leader," you say. "I'm not even a manager." We hear you. A certain project manager didn't think he was a leader, either—until he had

to become one.

When famous marketing guru Seth Godin was young, he agreed to lead a project for the small, struggling organization he worked for. He himself was totally committed, but he worried about the team of three people assigned to him.

So, he recalls, he started a regular newsletter that "highlighted the work of every person" on the team. "We highlighted their breakthroughs and talked about the new ground we were breaking. Twice a week, I talked about our quest. Twice a week, I chronicled the amazing work of our tiny tribe . . . Within a month six engineers had defected to the tribe working with me . . . Then it was twenty."

Eventually thirty people were working around the clock on Seth's team, and within months they shipped products that saved the organization.

As he explains, "They switched for the journey. They wanted to be part of something that mattered . . . Twenty years later people on that team still talk about what we built. And I, the twenty-four-year-old with no experience and no staff, got to go on the ride of a lifetime."[16]

Why was Seth able to draw such committed people around himself? *Because he valued them.* People naturally want to *matter*—and they want to make a contribution that matters.

According to the research organization Standish Group, project success is due more to the "emotional maturity" of the team than to the process it uses—in fact, more than three times more. Emotional maturity is a measure of "the basic behaviors of how people work together."[17]

So a team can succeed with pretty much any project management process it wants if the team members practice emotionally mature behaviors.

Leading people means modeling those behaviors yourself. As an unofficial project manager, you probably have only informal authority over your team. This is especially true if your team is cross-functional—drawing people from different areas, such as marketing, sales, finance, and product development. You are not their boss.

The only real authority you may have is informal, which is not the same as formal authority.

Comes from your character and capabilities. You're a good listener. You're clear about expectations. People trust you because you're trust*worthy*. You keep your commitments and hold other people to theirs. And you treat them with respect.	Comes from a title. A title doesn't automatically make you a good leader. It may give you the power to enforce rules or penalize people, but titles rarely guarantee willing followers who will give you their best effort.

Even if your title is manager or leader, you will still need "informal authority." You will never succeed without it.

This is especially true with younger workers, who emphasize authenticity, ethics, and values in the companies they work for. According to a Deloitte study, "Whereas older generations tend to respect authority even when they don't agree with it, younger generations are more vocal at resisting it."[18] They won't follow you just because you're "in charge."

Think about people who have had tremendous influence even without a formal title—people like Martin Luther King Jr. and Malala Yousafzai. You may not be leaders like these, but you will need to inspire people to want to play on your team and give their best and finest effort.

If you practice these Five Foundational Behaviors, you will earn the informal authority you need to lead effectively:

These five behaviors are foundational because everything falls apart if people don't live by them. You establish your authority by practicing them.

The team must understand and practice them as well. That's why you post them, discuss them, review them, and hold people accountable for them.

In an early team meeting, ask members what they think about these behaviors. "How would you define them? How will they help our team succeed? How do we deal with each other when we fail to behave? What should we do to keep the behaviors front and center in our work?"

The Five Foundational Behaviors are for the whole team, but you are inescapably the model for the behaviors. You want a formula for leading people? Here it is.

Listen First

Don't make the mistake of thinking you have to have all the answers. The pressure to "know it all" may tempt you to talk more than listen. Your instinct to tell everyone what's what may kick in out of fear. This instinct is potentially fatal.

By "listening first," you take the pressure off yourself to know everything. When people come to you with ideas or complaints, let them talk first.

When a team member tells Hedda (the scientist we met in chapter 1), "I have an idea that will speed things up," she has a choice. She could tell herself, *I'm under deadlines; the pressure is incredible; I can't listen to every idea; not now, I don't have time.* Or she could stop and really try to understand the team member's idea. Yes, it may slow down her day, but in the end, it may make things go faster.

Or Hedda could say to herself, *This person is too junior; she can't have any good ideas we haven't already thought of; I'm the one who's supposed to have the ideas 'cause I'm in charge here.* Yes, it may ruffle Hedda's ego a little to listen to a subordinate, but it would also ease the pressure on her to be the source of all wisdom.

Empathy is key. You don't have to agree or disagree, but you need to get into team members' heads and understand them. When you give them the chance to talk—*without interrupting them*—you'll get new and better ideas *and* they'll feel like you respect them.

Clarify Expectations

Imagine that you couldn't see a pair of shoes you wanted to buy online. Instead, you would have to order them sight unseen. You could go online and describe what you wanted—"I want nice brown shoes in size 10"—and the next day the seller would deliver to you a pair of faux alligator high heels with suede ribbons.

But what you had in mind was a pair of plain oxford dress shoes. You're very disappointed.

Who's at fault here?

Both parties, actually. You're at fault because you didn't specify what you had in mind.

But the provider failed to clear up exactly what you meant by "nice brown shoes." They had a totally different picture in their head than you had. They didn't ask what was in your head.

A famous writer once said, "The great enemy of communication is the illusion of it"—meaning we fool ourselves if we imagine that people fully understand what we say to them.

One reason projects fail is that people involved lack a shared picture of what is expected. Fuzzy expectations can be fatal to the project.

Suppose a team member tells Hedda, "I want to work on the budget this week." But without a clear idea of what "work on" means, the team member could spend the week, say, inventing new spreadsheets or something else that's useless. So your task is to get a clear picture of what the team member proposes to work on.

Hedda could ask him, "What exactly are you going to work on with the budget?" He might say, "Well, our cost estimates are probably too low. We ought to revisit those and get a more accurate picture." She might disagree and suggest a different task. Or she could respond, "Good. Can you give us updated estimates on Friday?" Now everyone is clear on this team member's commitment.

The key to clarity is to ask questions: "What do you mean by (blank)?" "Is this what you mean?" "Can I clarify one thing?" "How long do you want me to take?" "How much should I spend?" "Who can help me?" And so forth.

Projects succeed when people have a clear, unambiguous picture of what they expect of themselves and others.

Extend Trust

If you avoid delegating tasks, if you don't let team members make decisions, if you're always giving negative feedback, if your project drags on forever—you have a problem trusting people.

If you trust people to keep their commitments, they will almost always follow through. Your trust has a funny effect on them—they will typically work harder. They will want to do their best for the project team.

"People like having trust extended to them," says Stephen M. R. Covey, the son of Stephen R. Covey and author of the best-selling book *The Speed of Trust*. "When it is, people don't need to be managed or supervised; they manage themselves."[19]

Of course, trust is always conditional. A few people might lose your trust if they fail in their commitments. If, for example, a team member is always late, you'll need to be straight with them, but generally people feel motivated when you trust them to do their best.

Watch out, though. You counterfeit (or fake) extending trust when you delegate a task to someone but won't let them do it. "You asked me to research the new Genias system, so I'm going to spend the day on that," says a team member. If Hedda says, "I've already done that," she pulls the rug out from under that person.

Another counterfeit of extending trust is micromanagement. Instead of asking how things are going, you're always telling team members what to do and how to do it. You're checking their emails, demanding to know where they are all the time, or pointing out insignificant errors.

Give team members a chance to earn your trust and they'll almost always do it.

Practice Accountability

If you show up late two or three times to team meetings, what happens to your ability to hold others accountable for their commitments?

As project leader, you're the model for keeping promises. Others will follow your lead whether you like it or not. If you're late with a task, you lose the informal authority to hold other people to their deadlines.

Of course, you need to hold more than just yourself accountable. You hold the team accountable to the Five Foundational Behaviors, too. If Joren shows up late two or three times and experiences no consequences, what do the team members learn about your ability to hold people accountable? They'll think, *Well, if Joren can come in late and nothing happens, maybe it doesn't matter if I come in late*.

That's why the Five Behaviors are the foundation of the team. You post the behaviors, you get consensus on them, and you hold yourself and others to them.

So what do you do if a team member doesn't follow through?

Instead of nagging or scolding the person—or even worse, ignoring the failure—find out why it happened.

Joren says, "Hedda, I committed to audit the lab's documentation, but I couldn't get it done on time." Hedda could assume bad faith and bully him around, or she could act like a leader and probe for the reason. Maybe the lab director wouldn't cooperate. Maybe the task genuinely requires more time. Or maybe Joren got sick.

In any case, Hedda's job is to clear the path for Joren so he can complete his task. She can talk to the lab director. She can extend the time. She can get someone to help Joren or substitute for him.

Practicing accountability is not about punishing people. It's about helping them keep their commitments.

Demonstrate Respect

This foundational behavior may be the most important of all.

For one thing, mutual respect on a project team makes things go faster and better. When people don't respect each other, everything slows down. For example, picture yourself in a business meeting with people you don't respect—you doubt their motives, you discount what they say, you resist their opinions. Obviously, you put on the brakes wherever you can.

Now picture a meeting with people who respect each other. Discussions go smoothly, differences are aired, people talk straight, and agreements come quickly. It's a picture of emotional maturity. Respect speeds up the project.

Respect yourself first, then you can respect others. Respect is its own reward. If you're honest with yourself and others, if you hold on to your integrity, you've succeeded regardless of the outcome of the project.

Showing respect does not mean becoming a doormat. You show respect by speaking the truth. You can hold people accountable respectfully by talking straight with them. In fact, straight talk is a form of respect, if you're considerate about it and consistently practice it with everyone.

How do you demonstrate respect? By practicing the other four Foundational Behaviors: listen first, clarify expectations, extend trust, and practice accountability. If you practice them, people will want to play on your team and win.

The Five Foundational Behaviors are not surface behaviors. If they don't arise from your inner character, you're putting up a façade and people will know it. Without the inner character of a true leader, you can know all about project management processes and still fail. In the words of one professional project manager, your project will be like a watermelon—nice on the outside, and one big mess inside.

To sum up, as Elizabeth Harrin says, "Be a good human."[20]

It will take discipline to stick to the behaviors. You might be on the verge of missing a deadline, there's no way to recover, you're over budget, you've got unprepared team members, executives want to change everything, and your boss says, "I expected this to be done by now. What's the deal with you?"

Under this kind of pressure, you will be able to keep your head if you practice the behaviors. Practice them until they become habits. If you don't, you'll get caught up in managing the process instead of leading people, or what's worse, you'll find yourself hiding from your responsibilities. Either way, you will create little value.

Project leaders often stumble because of two opposite approaches to leadership: abandonment and micromanagement.

Some ineffective managers abandon the team, leaving them to struggle through on their own. Sometimes managers who mean well abandon the team intentionally, believing that it is "tough love." They think the way to develop people is to leave them alone. Nothing could be less helpful. Keeping a vigilant eye on the team and the project schedule is essential. Once you have

set clear expectations, you need to track the team's progress to see if they are winning or losing.

The opposite approach is micromanagement. Managers who get too deep into the details crush the initiative of their team members. Still others do both—they abandon the team for a while and then dive back in to play the hero when things go wrong.

So how do you put these Foundational Behaviors into practice?

We'll show you how. We have woven the principles of effective project leadership into the tools we provide in this book. We have designed the tools to encourage mature team behaviors. If you use these tools right, you will lead your project team to success.

MANAGE THE PROCESS

The third element in our success formula is to "manage the process."

Some people hate the word *process*. It sounds like the clanking machinery of a factory, and we don't want to see ourselves as cogs in the assembly line. If *process* doesn't inspire you, choose another word you like better: *pathway* or *parade* or *pilgrimage*—any *p* word you like.

But you'll still be going through a process to do your project. It could be a complicated, burdensome process or a simple, efficient process. A good process makes things easier—it gives you flexibility and security at the same time. You can feel confident that you're not wandering around aimlessly wasting time and resources, and you can always adjust the process if needed.

Historically, there are two general methods for managing the project process: the Waterfall Method and the Agile Method. Some project managers advocate one method over another; however, both methods can be complicated and tough to install if you're not a professional project manager.

The Waterfall Method

This traditional project management process is a step-by-step approach known informally as the "Waterfall Method" because the resulting project schedule looks like a waterfall:

"The Waterfall Method"

The Waterfall Method evolved to manage projects with a well-defined scope, clear objectives, and a deadline, like flying from Sydney to London or building a skyscraper. This method put people on the moon and built the Shanghai Tower. The project's value was determined while scoping it at the start, with minimal changes along the way, and its value was realized (or not) after the completion of the project.

Like everything else, though, project management is changing.

People want things done faster and want to ensure a project's value before they sign off on it. And speed is not the only issue. There is often a huge cost when people follow a rigid scope, complete the project, and then realize it isn't even close to what's needed. So much for value.

An impatient marketplace isn't always willing to wait while the "water" works its way down the orderly steps of the Waterfall Method. Industries such as software, advertising and marketing, and banking are moving to more nimble ways of doing projects, collectively called the Agile Method.

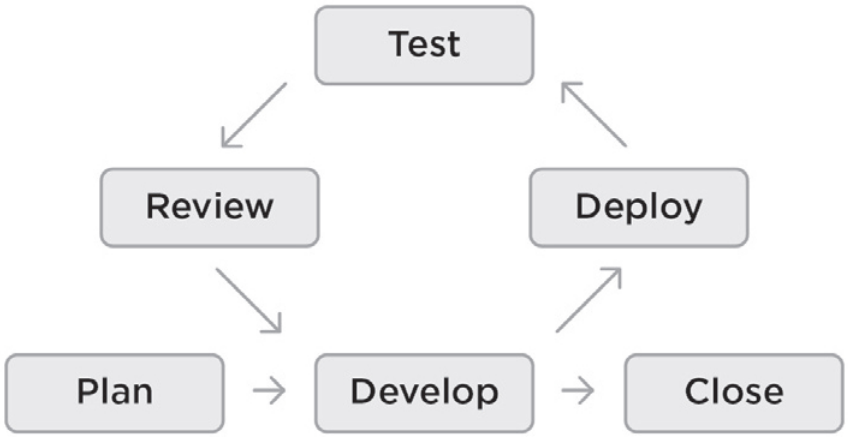
The Agile Method started in the world of software development, where products undergo constant change and improvement as functions and features are added.

People who use the Agile Method focus on fast delivery while they constantly rethink the project's value as they are creating it. They collaborate closely and implement appropriate changes to "sprint" to a finish.

Agile starts with a rough plan. Then the team conducts an "iteration," in which they develop a deliverable quickly, deploy and test it, and then come together for a review. They raise issues and repeat (iterate) the cycle, resolving the issues as they go. When all the issues are resolved, they close

the project and launch the final deliverable. Agile helps teams create value along the way with iterations to ensure the project delivers what's needed.

"The Agile Method"



For today's unofficial project managers, we have taken the best of both the Waterfall and Agile worlds to provide a process that is doable and will consistently achieve project success.

Here's how to lead your project:

First, we SCOPE the project to define its value to the people who will benefit from it.

Then we PLAN how to achieve it.

We ENGAGE people to give their best to the work, revisiting the plan as necessary.

And we TRACK & ADAPT throughout to ensure we're always heading for value.

Finally, we CLOSE the project and celebrate success and lessons learned.

We already follow these steps without thinking about it. For example, have you ever painted an apartment? If you have, you know how the process goes.

First, you go to the paint store. Your project has begun. The sales associate interviews you to clarify expectations. She asks, "What are the walls made of? How much wall space do you want to cover? Where is it? What color do you like? Oil or latex?" She compiles your answers into a clear Project Scope Statement. That's SCOPING.

Next, you and she confer with the mix operator and PLAN the type and quantity of paint, the tools you will need, the time it will take, and so forth.

Now your project goes into the ENGAGE phase. The paint is mixed, the team gets together (you and your partner and your best friend), you prepare the walls, and you roll on the paint.

You TRACK & ADAPT as you go, monitoring the results, watching for drips and missed areas, taking stock between coats, touching up—making sure the walls look the way you want them to. Or you might want to change something—apply a different color to the molding or stencil a design onto a wall. Your friend suggests mauve instead of teal for the bathroom. TRACK & ADAPT is about getting feedback and acting on it to ensure you are providing the highest level of value—even if the new changes don't exactly reflect how you scoped the project in the first place. Acting on valuable feedback creates a higher-value project.

Finally, you CLOSE. When the painting is finished, you clean up, move the furniture back in place, and have pizza. The CLOSE phase requires a little more than that, actually—you document lessons learned for future projects, get key stakeholders to sign off, and you recognize and celebrate all those who contributed to the project! (Pizza is optional.)

The rest of this book is organized around five steps adapted from both the disciplined Waterfall Method and the swifter, more responsive Agile Method. More to the point, if you follow the five steps, you'll be applying universally accepted principles of project success. And you'll hear the stories of people like Hedda who are leading projects and learn from them what works and what doesn't.

By the end of the book, you'll be well equipped with a basic process and tools to carry out your own projects successfully.

TO SUM UP

In short, the success of a project depends on this equation:

SUCCESS ▶ VALUE + PEOPLE + PROCESS

Your first priority is to create value for your customer. You do this by practicing the Five Foundational Behaviors as a team leader and managing the process with excellence. There are five steps in the Franklin-Covey project management process: You scope first, then plan the project, engage the team (practice disciplined accountability), track & adapt to change, and close the project with excellence.

CHECK YOUR LEARNING

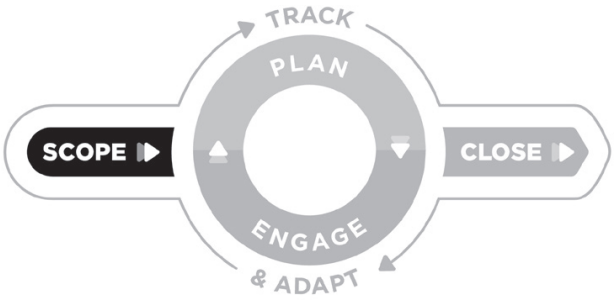
- ✓ What's the difference between compliance with the project management process and delivering value?
- ✓ What is informal authority, and why is it important to an unofficial project manager?
- ✓ How do you build informal authority with people? Which of the Five Foundational Behaviors do you personally need to work on?

- What are the five steps of the FranklinCovey project process?

CHAPTER 3

SCOPING THE PROJECT

The Goal: "Clarify a shared and measurable set of expectations."



THE SCOPE IS THE "WHAT" of the project: "What are we trying to do and what do we need to do to get it done?"

Try an experiment: Blindfold some people, take them to a park, and ask them to walk forward in a straight line. What happens?

They walk in circles. Invariably. Sometimes the circles are wide, sometimes tight. The circles aren't perfect—they're loopy, sometimes in one direction, sometimes another. A lot of people even backtrack.

The point is this: Blindfolded people can't walk in a straight line.

Why? We all walk in circles when we can't see a point of reference like the sun, the moon, a mountain, or a road sign. Without these things to refer to,

we can't move forward.

That's why scoping is so important in project management. If we aren't clear on the destination, we act like we're blindfolded. We end up "circling around" doing re-work, second-guessing, or getting smothered by "scope creep"—the tendency of a project to get sucked into a black hole.

According to *PMBOK*, the "scope" of a project is "the work that needs to be accomplished to deliver a product, service, or result with the specified features and functions."[21] More simply, scope defines what you're going to do to create value—and what you're *not* going to do.

In this chapter you'll find out how to scope a project in order to move ahead instead of going around in circles.

SENSITIVITY TO INITIAL CONDITIONS

Scoping is the most important of the five steps of project management. Even a little misunderstanding about scope can bring disaster down the road. This principle is known as "sensitivity to initial conditions."

If you start even one degree off course on a flight from Sydney to London, you might end up in Rio instead. The same is true with a project you're managing. Without a clear and shared picture of the value you're trying to create, the project is doomed.

One experienced project manager was called in to help on a large project that was flopping badly. When he looked into it, he found nothing but fog. "My first job was to find out why all the stakeholders seemed to be on different planets, let alone different pages. So I quizzed ten key stakeholders about the purpose of the project—suffice it to say that no two answers matched!"

The number-one reason for project failure, the experts say, is "unrealistic expectations based on insufficient data and information."[22]

You've got to make sure that everybody sees the same picture of your project's outcome. Its value must be clear and unquestionable to the people involved.

So how do you make that happen?

You start by learning what everyone expects from the project. You may think everyone has the same thing in mind (for example, a "nice pair of brown shoes"), but a smart project leader starts with the assumption that *nothing is clear*. If you do, you won't hear that unhappy voice down the road that says, "This isn't what we wanted."

To do effective scoping, we:

- Identify key stakeholders.
- Interview key stakeholders.
- Document the project scope.

IDENTIFY KEY STAKEHOLDERS

Let's start by defining a stakeholder as anyone involved in the project or positively or negatively impacted by it. They "hold a stake" in the project. Something is "at stake" for them.

We start to scope when we identify our key stakeholders and skillfully interview them. We want to know what value they expect from the project.

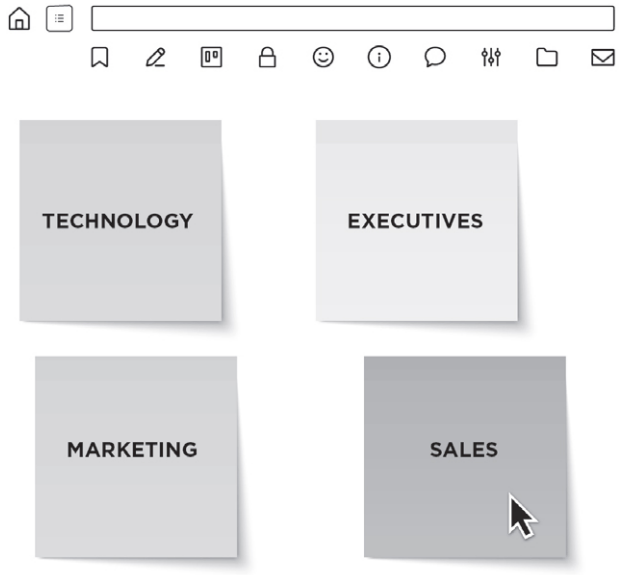
When identifying stakeholders, we cast a wide net to think of everyone we can, so that later we don't have *the one person we forgot* saying, "Excuse me, why didn't you check with me?"

Once we have identified all stakeholders, we identify *key* stakeholders. They are the people who determine the success or failure of the project. They are "decision makers." They are customers, both external and internal. They are the ones who "need the project." They are people who can remove roadblocks or exert influence where you can't. They are clients, regulators, legal advisers, political figures, community members, and activists. They are critics, skeptics, consultants, experts, believers, and disbelievers. They have "energy around" the project.

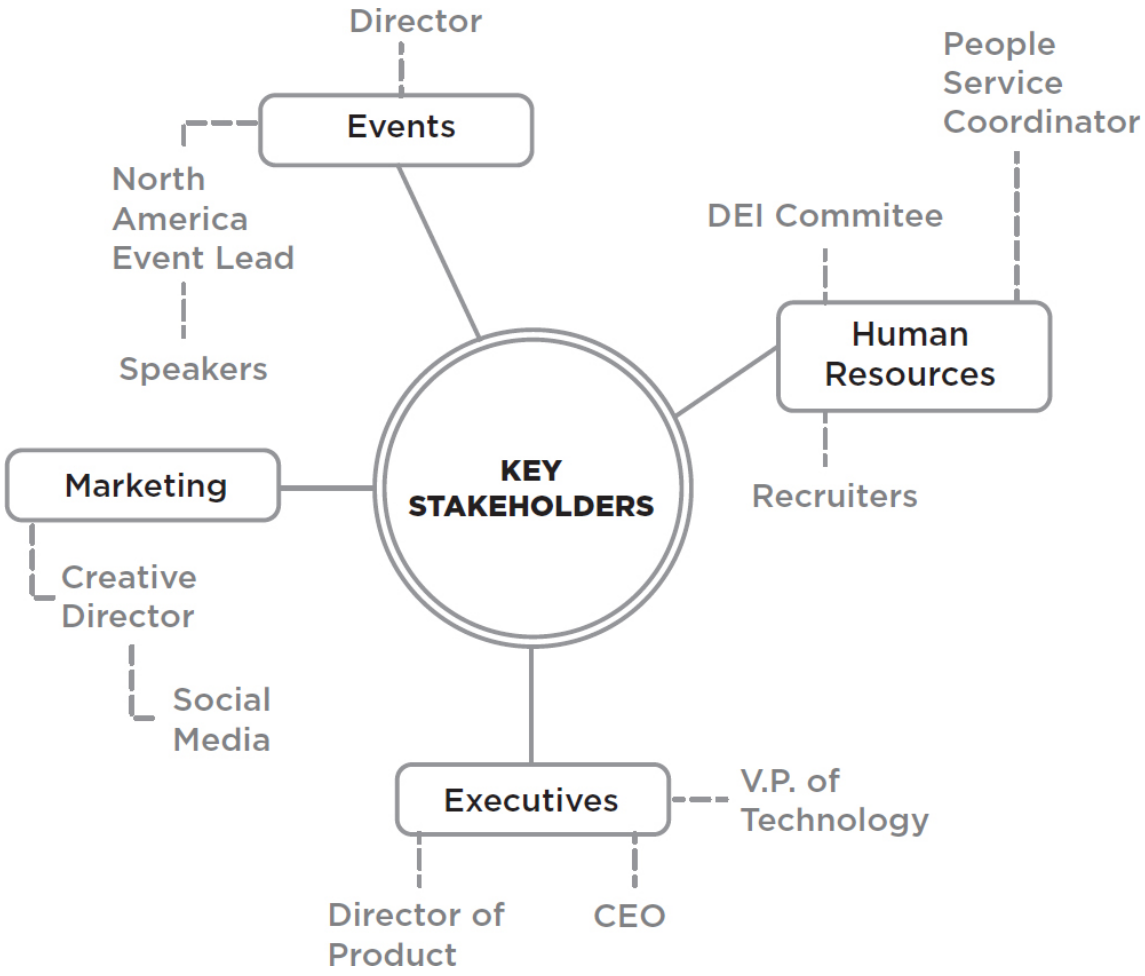
To identify your key stakeholders, brainstorm a list of all the people involved in or affected by the project. Find coworkers, team members, or just friends to help you brainstorm your list—the more people, the better. That way you're less likely to miss someone who should be on the list.

When you brainstorm, go quickly. Go for quantity. Don't judge ideas. Build on each other's ideas. You can brainstorm on a whiteboard with sticky notes or a digital brainstorming tool like this one:

TOOL: STAKEHOLDER IDENTIFICATION



Or use a thought map like this digital example:



If you brainstorm your list thoroughly, you're less likely to get caught unaware down the road. The more effort you spend identifying every possible stakeholder, the smaller the chance of failure.

Let's follow a fictional example. Hedda's pharma organization once spent years developing a new drug only to get laughed out of the market because it required two doses per day. A competitive drug did pretty much the same job on one dose per day, but the development team didn't know that. They had failed to involve the marketing department in the project. So here comes the product marketing director to say, "Why didn't you check with us? We could have told you your two-dose drug wouldn't sell."

In another example, a major bank spent six months on a project to create a new product. The team anticipated "a big hit" with customers and a lot of new revenue. But when they went to unveil the product, the bank's lawyers—who had not been consulted—looked sick. "We love the idea," they said,

"but everything you've built is illegal." The project was a waste of time, and "the team was crushed."[23]

By taking the time to identify everybody who might be "touched" by your project, you will reduce the risk of this kind of mess-up.

Once you have identified the stakeholders, you can put them in categories meaningful to you: deciders, customers, thinkers, creators, advocates, opponents. You can categorize them by function: sales, marketing, finance, administration, customer service, manufacturing, legal, product development, and so forth. Group and arrange them in rows, by color, by hierarchy—any way you want on your brainstorming board.

The most important category is *key stakeholders.*

These people determine whether your project succeeds or fails.

Most project leaders underestimate the importance of this step. They talk to only one customer, one sponsor, or one manager and think they have a clear picture of what's expected. *This is what Tesman wants, so let's go get it done*, Hedda might think.

But in this complex world of multiple, often competing priorities, no project has just one stakeholder. Many people might be affected—not only the sponsor but the sponsor's boss, the sponsor's boss's boss, the finance lead (most crucially!), key clients, key department heads, and so on.

Value is in the eye of the beholder. Together, these key stakeholders decide whether your project has value. Also, value is not the same as relevance—what doesn't matter much to one stakeholder might matter a great deal to another. For example, there might be value in a project to change all the light bulbs in an office building, but how *relevant* is that project to anyone?

Your project must be *valuable* and *relevant* to your key stakeholders.

To determine which stakeholders are key, use the following thinking tool called the Key Stakeholder DANCE:

TOOL: KEY STAKEHOLDER DANCE

Choose key stakeholders who:

DECISIONS	Make decisions that control or influence the project.
AUTHORITY	Grant permission to proceed or stop the project.
NEED	Directly benefit from or are affected by the project.
CONNECTIONS	Are connected to the required people, money, or resources.
ENERGY	Have positive or negative energy that could affect the project.

The D, A, and N categories are usually easy to identify. They define the value of the project, approve it, and sign the budget. Every single one of them needs to be identified.

But don't overlook the C and E key stakeholders—the ones with connections and energy that influence the project. These "influencers" often have a lot of impact, although their authority might be informal. They might include other departments, community activists, and even friends or family members of the deciders.

The E stakeholders have enough positive or negative energy to influence project success. Have you ever run across people who just breathe an atmosphere of negativity? They bring hidden agendas and political flimflam. You wish they would go away, but you might need their expertise or approval. So you must "lead" them or face the big whammy.

The Five Foundational Behaviors will help you with prickly personalities. If you listen empathically to their input, clarify their expectations, trust them as far as you can, keep everyone accountable, and respect their perspectives, they might be less negative. Also, key stakeholders with positive energy or strong connections can offset some of the negative energy. At the same time, you might find that people with negative energy can offset groupthink and bring new and better ideas.

INTERVIEW KEY STAKEHOLDERS

Once you've identified the key stakeholders, you'll want to get as much input from them as you can, as early as you can. The principle here is

"frontloading," which means getting as much input as possible as soon as possible from as many key people as possible.

Many project leaders make the mistake of charging into the project without frontloading. When we ask them why they don't do it, their answers are always the same:

- "I don't have time for that."
- "I think I already know what they want."
- "I don't know how to interview people."
- "I don't have access to those key stakeholders."
- "I don't want them to lose confidence in me. Doesn't asking a lot of questions make me look dumb?"

Each of these excuses will put your project in real jeopardy right from the start. At the same time, some of them may be true—for example, "I don't have access to those key stakeholders."

Of course, getting access to busy, influential people can be tough. So here are some tips for making useful contacts with key stakeholders:

Discover the communication methods stakeholders prefer. Do they want to be texted? Emailed? Do they want to talk in person or on the phone?

Introduce yourself and your role. If they don't know you, make sure they fully understand your purpose in contacting them.

For high-level stakeholders, reach out to their preferred contact. Some prefer that you talk to some other knowledgeable person, as given their position, they may not be up on the issues you're dealing with.

Capture their attention with a "hook." Everyone, especially people whose time is limited, needs to know WIIFM—"What's in it for me?" So start by hooking them with something they care about.

- "This project means a lot to your sales goals, so I need to make sure I have all the information I need from you to make it a great success."
- "Your input is essential. With your research expertise, we can make this project succeed."
- "I want to make sure I completely understand your expectations so this project delivers the value you're looking for."

Briefly explain what you need and why, so you don't waste their time. "Dr. Venda, because we're trying to speed up our drug-development process, we need you to share with us your experience fast-tracking drug projects—specifically the 5-FL project and the 6-SV project."

Follow up. Don't give up—call, email, chat. Don't leave them hanging. Keep them in the loop as the project progresses.

Balance courage with consideration to meet your needs and theirs. Your stakeholders are not out to sabotage your project—they're just busy. So have the courage to step up, let them know the value of the time you're asking for, and be prepared to ask a few vital questions. And have the consideration to put on a pair of very big ears and listen deeply. And be sensitive to the demands on their time.

Don't assume you already know what your stakeholders want. If you're assigned to run a project to "speed up that process," you need to ask, "Why, by how much, by when, who can help, and who decides what's fast enough?" You might also need to ask, "What's the expected return on investment? What's the net present value of the investment?" Without clear answers, you're heading off blindfolded in a general direction that takes you in circles.

Your goal is to understand the unique perspectives and desired results of each key stakeholder *before* you start the project.

Use the following Project Scope Statement to guide your interviews.

TOOL: PROJECT SCOPE STATEMENT

Project Name:

Project Purpose	**Feedback Loops**
Why are we doing this project?	Who needs to provide feedback? When and how?
Description	**People Resources**
How would you describe this project?	Who are the key team members?
Desired Results	**Priorities**
What specific outcomes must we achieve to be successful?	How would you prioritize these constraints? (1 = most important) Time: Quality: Budget:
	Time
	When is the project due?
	Quality
	What does “done” look like? How will we know?
	Budget
	What is the budget?
Exclusions	**Acceptance Criteria**
What is out of the project’s scope and should	Who needs to sign off on the project—and

NOT be included?	when?

You will want to ask the questions in this tool of all your key stakeholders.

Let's look briefly at each part of this tool, using the example of Kimani, who leads a team of teachers in an urban school in the United States.

Project Purpose

"Why are we doing this project?"

The purpose statement should tap into the organization's goals. For example, Kimani's school struggles with stagnant reading scores, so reading improvement is its strategic priority. (Note that the tool contains a line item for Project Purpose and another for Desired Results. What is the difference between them? We'll see.)

Description

"How would you describe this project?"

Here you answer the how, what, and when of the project. "What part of the school day will be for reading instruction? What methods will we use? What materials will be required? How will we measure individual improvement? How will we celebrate achievements? Who can help?" And so forth.

Desired Results

"What specific outcomes must we achieve to be successful?"

Outcomes should be described as specifically as possible and link to a strategic priority: "A measurable increase in reading fluency and comprehension." How will you measure those things? When will you be able to tell you've achieved the outcomes?

For example:

- "Raise aggregate reading scores by three levels per term."
- "Have 60 percent of students reach grade-level competency in reading by end of school year (currently only 47 percent)."
- "Increase proficiency scores by 20 percent by end of school year."

Exclusions

"What is out of the project's scope and should NOT be included?"

A great way to avoid the famous "scope creep" is to decide what you should *not* include in the project, at least initially. For example, Kimani's team chooses not to participate in certain testing schemes promoted by outside interest groups. Knowing the exclusions saves you time, money, and headaches over work you don't need to do or that may not provide value.

Feedback Loops

"Who needs to provide feedback? When and how?"

Feedback loops enable you to keep moving toward creating value. Good feedback helps you keep your initial commitments and be agile (within reason) so you can make needed corrections or enhancements to the project's value along the way. This is very different from scope creep.

For example, Kimani's stakeholders include her own team members, the school administration, the district reading resource officer, the school's community council (representing parents), and a curriculum provider.

Ask stakeholders, "What do you need to know and when as the project goes forward?" Also *tell* stakeholders, "Here's what *I* need to know and when." Get clear on how to get and give feedback—email, text, phone, videoconference, whatever. Account for time-zone differences. For example:

- "Taunee: Feedback on curriculum choices per the project schedule. (Interface with the textbook provider on the West Coast.)"

- "Irene: Feedback on program activities and results to the community council each week."
- "Ren: Feedback on individual outliers—ongoing weekly team meetings."

People Resources

"Who are the key team members?"

When you have the luxury of choosing some, or all, of your team members, think beyond the obvious—whether they have the right technical skills. As we've emphasized before, you'll make better progress with people who practice the Five Foundational Behaviors.

If you can, choose good listeners who talk straight. Choose people you trust to be responsible and accountable for their work. Choose people who behave respectfully toward others. Often, these human skills count more toward project success than technical skills.

For an organization-wide project, you might want cross-functional team members: "Abdul from marketing, Rob from finance, Chauntel from sales."

Obviously, you can't always choose your team members. In Kimani's case, she works with the teachers who are on-site regardless of their level of enthusiasm for the project. But remember, your *own* commitment to the Five Foundational Behaviors shouldn't change based on the makeup of your team, whether team members were your first choice or not. You want a team that feels included, respected, and openly invited to volunteer their best efforts to make the project a success. You'll be surprised how even less-thanenthused team members perk up when they feel respected and included.

Priorities

"How would you prioritize these constraints?"

- Time: The project must start "no earlier than" and finish "no later than."

- Quality: The degree of compliance to quality standards in two areas: process and product. Are you following a quality project management process? (If you stick with this book, you will!) And will your final deliverable meet stakeholders' requirements? Will it have the benefits and features they're asking for? (Quality is subjective—the stakeholders decide what it is.)
- Budget: The approved estimate of costs.

Are we most concerned about finishing on time or doing the job with quality? Or is the budget most important?

These constraints are like threads in a spider's web. If you pull on one thread, you shake up the whole web. If quality is most important, it will affect the budget and time involved. If time is of the essence, you might have to downplay quality and spend more on budget. And so forth.

If your project is to paint your apartment, you'll inevitably face constraints:

- Time: "I've only got one weekend."
- Quality: "I'd like to use one color of oil paint on the walls and another color on the molding."
- Budget: "I've set aside a hundred dollars for the project."

Taken together, these constraints may or may not be reasonable. For example, oil paint requires more careful application and more complicated cleanup than latex. As for the budget, latex paint is generally about half as costly as oil paint. You might not be able to afford the different kinds of oil paint you want.

So you'll prioritize. Given the constraints of time and budget, you might have to settle for a little less quality—only one color of less expensive paint. If you really want high quality, you'll need to spend more and take longer.

Make sure you ask key stakeholders to rank the three constraints *and explain their ranking*.

One of our colleagues tells this story:

On Tuesday morning the marketing director stopped me in the hall. “I’ve been looking for you,” she said. “I’ve got a quick project and I need your help.”

I learned she wanted a new podcast ready for a product rollout that weekend. She continued, “Here’s what I need from you: a really cool podcast script so I can record it Thursday night before the rollout. I want to tell people about all the features on the new product. Also, a nice podcast cover and an announcement so our customers will know it’s coming.”

I asked, “So how much do we have to spend on this project, and who in product development can help me with the content?”

“Take it out of your discretionary budget. And you need to stay away from the product-development people—they’re up to their necks trying to get the product ready.”

I sensed a big whammy in the air. None of this boded well for me. Before I learned project management skills, I would have said okay, walked back to my desk, and promptly pulled my hair out. Instead, I wouldn’t let her go until I’d talked her through the priorities.

“Which is most important? A cool, well-informed script; using only the two hundred I have left in my budget; or getting it all done by Thursday?”

She answered like a typical executive: “All of it!”

So I asked the questions a different way. “I know it’s all important, but let’s put it this way. Is publishing the podcast before the rollout the most important thing? Couldn’t we take the time to do it really well and just follow the communication plan we already set up? We could put a great podcast out next week, but Thursday is really pushing it.”

She thought for a minute. “No,” she said. “We need the impact of a podcast before Saturday.”

“Okay, so having the script ready by Thursday is the most important priority?”

“Yes.”

“Great, that’s helpful,” I continued. “With no access to the developers, I don’t know the latest flash and sizzle about the product. Would you settle for a script that just generalizes about the product without getting into all the details?”

“I guess that would be all right. I can add some detail myself. I just don’t want you interrupting the developers right now.”

“Okay, I think I can make this happen. But a high-quality cover requires art and a budget bigger than a couple of hundred. Especially if you want it overnight. I can’t promise I can deliver what you want without the money and the help.”

“How much and who do you need?”

“I’ll let you know if you’ll give me a couple of hours,” I said.

“Okay.”

I smiled as she walked away.

Why did our colleague smile?

Because by clarifying expectations and prioritizing the list of constraints, she was able to negotiate a bigger budget and more resources. Instead of pulling her hair out, she has a good chance of getting the results her boss wants and keeping her hair.

Acceptance Criteria

"Who needs to sign off on the project—and when?"

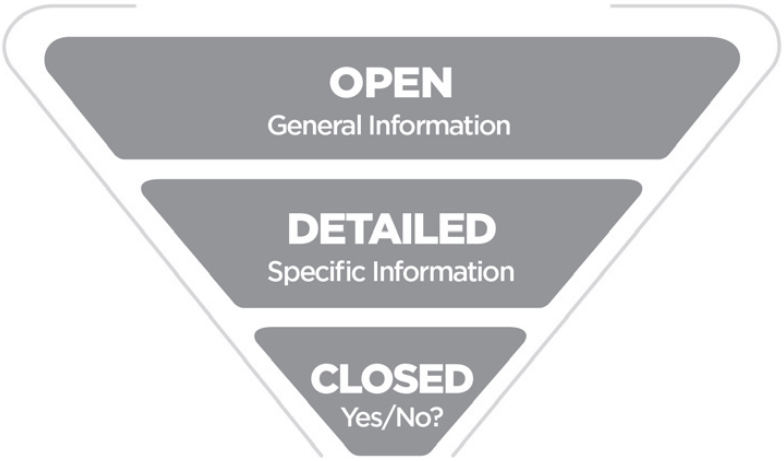
For example, if the boss needs a high-quality podcast cover, somebody in the graphics department will have to create the image. That probably means you need sign-off from the graphics manager. You might also want the marketing director to sign off on the podcast script—to be sure you get the messaging right.

By now you can see why key stakeholder interviews are so important. Remember that value is in the eye of the key stakeholder—if you don't tie down what that value is, you might do a bang-up job on a project that's worthless.

How to Ask Questions

When you're asking questions, go from general to specific so you can get as precise a picture as possible of the vision in the key stakeholders' minds.

Filter your questions through a funnel like this:



- Open questions get at the big picture: "How do you define success on this project?"
- Detailed questions drill down to leaner information: "Could you tell me more about what that means to you or what it would look like?"
- Closed questions are the key to success: "So here is what I hear you saying . . . Did I get that exactly right?"

Use the funnel questions to tie down the value of your project. If you don't, you'll get answers that are too general ("I need a cool podcast script"). Ask the detailed questions to get past the over-general to the specific ("What do you mean by a 'cool' script?" "How long should it be?" "Do you want an interview format?").

The closed questions give you a clear picture of what the stakeholder really wants ("Okay, I heard you say it should be no more than fifteen minutes. An interview format would be more interesting than just a talking head. And 'cool' means full of flash and sizzle, like introductory music and a couple of customer endorsements. Have I got it right?").

Sometimes you won't be able to interview key stakeholders individually and you'll meet with a group of them. Group interviews can work well. You get a lot more input faster. You might get better insights as people hear each other's viewpoints and build on each other's ideas (that's called synergy).

But group interviews can go wrong if everyone's trying to talk at once and take over the agenda. So here are some tips for group interviews:

- Get as many stakeholders together as you can in one room or online.
- Set a strict time limit. Promise to stop at the set time and keep your promise.
- Set a ground rule that no one can interrupt anyone else. The purpose of the meeting is to hear each other out.
- Give each person only a few minutes to answer your questions.
- Don't argue with anybody. Ask a question only if you need clarification. Then thank the contributor and move on.
- Record the meeting and distribute the results to all stakeholders.

It might be a good idea to post the Five Foundational Behaviors as ground rules for the meeting.

If you follow these tips, you'll get maximum information in minimal time.

Keep in mind that projects attract controversy. Stakeholders may disagree with each other. They'll question the approach you're taking, costs,

resources, timing—even the value of doing the project at all. But not in this group interview setting.

Make sure they understand they are there to listen respectfully to everyone. You can discuss issues later by appointment (your project management app might feature a function for tracking those issues).

Don't be surprised if your questions lead to a project different from the one you had in mind. You might see the project in a new light. Stakeholders will be grateful that you cleared things up.

Most important, you'll glean from stakeholders what the true value of the project is. As a result, the project will bring a good return on investment, and your influence will grow as a contributor to organizational success.

DOCUMENT THE PROJECT SCOPE

The outcome of your interviews should be a Project Scope Statement.

According to *PMBOK*, the Project Scope Statement defines the main elements of the project, that is, "the work performed to deliver a product, service, or result with the specified features and functions."[24] The following sample defines the scope of Kimani's project to improve student reading skills:

TOOL: KEY STAKEHOLDER INTERVIEWS

Project Name: *Grade-Level Reading Project*

Project Purpose	**Feedback Loops**
Why are we doing this project? *Our school struggles with stagnant reading scores. 53 percent of our students are reading below grade level, and only 19 percent are proficient. So reading improvement is our top strategic priority.*	Who needs to provide feedback? When and how? *Our team members, principal and vice principal, district reading resource officer, school's community council (representing parents), and our curriculum provider Reading Ring.*

Description

How would you describe this project?

- *Increase guided reading to 45 minutes/day and independent reading to 45 minutes/day.*
- *Use Reading Ring phonics and total physical response method and obtain RR materials for each student.*
- *Use RR test materials to gauge progress.*
- *Celebrate achievements with Rocket to Rainbow tags.*
- *Recruit reading volunteers from community council.*

People Resources

Who are the key team members?

- *Kimani, project lead*
- *Taunee, content expert on Reading Ring curriculum*
- *Irene, community council representative*
- *Ren, special education*
- *Alzo, first-grade rep*
- *Fleur, second-grade rep*
- *Jim, third-grade rep*

Desired Results

What specific outcomes must we achieve to be successful?

A measurable increase in reading fluency and comprehension.

- *Raise aggregate reading scores by three levels per term.*
- *Have 60 percent of students reach grade-level competency in reading by end of school year (currently only 47 percent).*
- *Increase proficiency scores by 20 percent by end of school year.*

Priorities

How would you prioritize these constraints? (1 = most important)

Time: *1* Quality: *2* Budget: *3 Students are measurably lagging in reading competency by one year. It's critical to reach grade level by the end of this school year.*

Time

When is the project due? *End of school year.*

Quality

What does "done" look like? How will we know?

"Done" when desired results are achieved.

Budget

What is the budget? *Three-year subscription/student = $61 plus incidentals. Total: $15,000.*

Exclusions

What is out of the project's scope and should NOT be included?

Acceptance Criteria

Who needs to sign off, on what, and when?

Omit K-3 testing option promoted by state school office.	*Teacher team to sign off on curriculum and approach by July 20. Administrator, specialist, and community council to sign off by August 20.*

Let's look at each part of this sample Project Scope Statement. The "Not This" column contains typical responses that are not helpful to the project team. The "This" column features answers that are more detailed and specific.

	NOT THIS	**THIS**
Project Purpose	*We are doing this project because our students need to read better.*	*Our school struggles with stagnant reading scores. 53 percent of our students are reading below grade level, and only 19 percent are proficient. So reading improvement is our top strategic priority.*
Description	*Spend more time on reading and try out new ideas.*	*We will increase guided and independent reading time to 45 minutes/day each and change our instruction approach using the Reading Ring method and materials from Curious Curriculum Co.*
Desired Results	*Beat last year's reading numbers.*	• *Raise aggregate reading scores by three levels per term.* • *Have 60 percent of students reach grade-level competency in reading by end of school year (currently only 47 percent).* • *Increase proficiency scores by 20 percent by end of school year.*
Exclusions	*No outside tests.*	*Not to include K–3 reading tests promoted by the district.*
Feedback Loops	*Administrators.*	*Administrators, district reading specialist, and community council.*
People Resources	*Faculty members.*	*1st–3rd grade teachers, principal, resource specialists, volunteer parents.*
Priorities	*Timing.*	*Students are measurably lagging in reading*

		competency by one year. It's critical to reach grade level by the end of this school year.
Acceptance Criteria	*Faculty and administrators.*	*Teacher team to sign off on curriculum and approach by July 20. Administrator and community council to sign off by August 20.*

What are the advantages of documenting the project scope in this way?

The document provides a "compass" for getting where you need to go. Stephen R. Covey said, "We are more in need of a compass than a road map. We often don't know what the terrain ahead will be like or what we will need to go through it; much will depend on our judgment at the time. But a compass will always give us direction."[25]

The scope statement gives you the direction you need without binding you to too many details. Stakeholders can see in one place the why, what, when, and how of the project.

You might hold a project kickoff meeting where you can review the document with key stakeholders. Their signatures on the scope statement represent consensus. Once they sign off, you have at least some leverage for holding them to their commitments. This leverage can be very useful to an unofficial project manager, especially if stakeholders start to change their minds about the project scope.

The scope statement does not necessarily tie down exactly what the project is or is not. You will want the clearest possible Project Scope Statement up front, but you'll also want to be open to feedback and value-added changes along the life of the project. Although it isn't sacred, the Project Scope Statement keeps people honest about the project. Up front, people tend to be starry-eyed and impractical about what this magnificent project can achieve. "During the magical early stages of the project," says Seth Godin, "we envision not just perfect execution but limitless features. At this stage, every project needs a truth teller."[26]

As project manager, you need to be the "truth teller." The Project Scope Statement reduces the risk that the project becomes the stakeholders' never-ending wish list and you become the genie who's supposed to grant all their wishes.

CURING A HEADACHE

Hedda Rising loved the brain. In high school she saw a video about brain anatomy and was fascinated. At university she got her degree in biology and then an advanced degree in brain science.

As an intern at the European Medicines Agency (EMA) in Amsterdam, she learned a lot about how drugs work on the brain, and then got her job at Lettal.

Restless after a few years of testing brain tissue samples, she applied for a promotion. Given her experience in Amsterdam, the Lettal executives made her assistant director of regulatory affairs and then director.

But now she would like nothing better than to disappear back into the lab. Suddenly she had two jobs—policing the research department and this new project. "Shorten the approval time," Tesman demanded. And she knew there wouldn't be any letup on either job.

With the help of her assistant, Berta, she brainstormed a list of project stakeholders and then narrowed it down to the key stakeholders: Tesman, of course; the board of directors; the marketing director; a financial analyst; the legal department; and some senior researchers. Reluctantly, she included Dr. Brack, the crisp, no-nonsense head of research.

Hedda conducted a few one-on-one interviews but eventually had to hold a group interview online with some who couldn't join otherwise. After explaining the Five Foundational Behaviors, she asked each stakeholder to answer her questions in turn. "How do you see the problem? What is it costing us? What's causing the problem? What do you think we should do about it? What is a reasonable outcome? Who should be on the project team?"

Things went well until it was Dr. Brack's turn. A brilliant scientist, he was famous for speaking his mind and annoying people in the process. "I don't know why we are even talking about this," he said. "Science dictates how we develop drugs, not rules and regulations made up by some bureaucrat. We have to keep testing the migraine compound until we're sure it works; that's reality. Developing a new drug takes just as long as it takes. You can't 'speed up' science!"

Hedda sensed that the big whammy was about to get her, and she wished she had the migraine pill right now. She'd always tried to avoid Dr. Brack because his ego filled any room he entered. But she respected the ground rules and merely said, "Thank you, Dr. Brack. Next?"

But the issue touched off the other researchers. Taking their cue from Dr. Brack, the others got defensive, too. One spoke up and said she was tired of being blamed for things beyond her control, she was already working ninety-hour weeks, and she couldn't work any harder or faster. Another researcher was skeptical about how much faster other drug companies were: "I don't trust their processes. They're all crooks." Eilert, a medical writer, claimed that the organization just wanted to make more money faster and didn't care about the process.

Hedda could sense the big whammy hanging over her head. But she spoke up last. "Look, I know science can't be rushed. But if we're always slow to market, we soon won't even be *in* the market. Tesman knows that, and so do you all. I believe we can do better. People—suffering people—need our help now, and if we can give it to them earlier than we have done in the past, they'll get better sooner, and we'll feel better about ourselves."

After that, the conference was quiet. Then Tesman congratulated Hedda on her work with the key stakeholders. "Hedda has a very good point. It's not just a question of profits. It's about easing pain and suffering."

Hedda had her charter for the project. Most stakeholders hadn't known that their rate of approvals was slowing down. The financial analyst shared the grim results of falling behind in the market. The researchers were defensive, but because of the ground rules, they could get most of their concerns off their chests without sparking a big argument.

Most important, Hedda reminded them that doing great things for patients was their reason for being.

Hedda now had enough information to draft a scope statement. It looked like the following:

TOOL: PROJECT SCOPE STATEMENT

Project Name: *Time-to-Market Improvement*

Project Purpose	**Feedback Loops**
Why are we doing this project? *Better-quality submissions can benefit patients and the firm alike: Launching products more quickly can shorten waiting times for life-enhancing therapies and generate more days of peak sales. Each month we are not in the market can cost us millions.*	Who needs to provide feedback? When and how? *Monthly stakeholder update meetings to ensure continued value.*
Description	**People Resources**
How would you describe this project? *We will create a new comprehensive system for submitting applications earlier and with better quality.*	Who are the key team members? • *Joren, medical writer* • *Eilert, medical writer* • *Thea, legal counsel* • *Dr. Brack, research director* • *Jorge, project assistant*
Desired Results	**Priorities**
What specific outcomes must we achieve to be successful? *Average product approval time 67 percent faster—from twenty-two months to seven months—after two fiscal years. 18 million in increased revenues due to increased average time in market.*	How would you prioritize these constraints? (1 = most important) Time: *2* Quality: *1* Budget: *3*
	Time
	When is the project due? *Two fiscal years*
	Quality
	What does “done” look like? How will we know?

	Approvals at least as rapid as our key competitors' approvals
	Budget
	What is the budget? *2 million*
Exclusions	**Acceptance Criteria**
What is out of the project's scope and should NOT be included? *Clinical-trial protocols must remain the same. No changes allowed in effectiveness and safety standards.*	Who needs to sign off on the project—and when? *Board of directors and CFO to sign off on project plan by April 30.*

Hedda distributed the scope statement draft to all stakeholders. People started talking, sharing ideas, and making suggestions. A few things changed, but the scope of the project remained roughly the same. A few days later they all signed the second draft, and even the touchy Dr. Brack agreed that the scope was reasonable.

Imagine what would have happened if Hedda hadn't followed the simple steps of the scoping process. Her only authority would be a verbal request from the CEO. She'd be getting little or no support from key people with priorities of their own. She wouldn't know if the project made sense financially or how much budget she needed. She wouldn't even know what the goal really was or how much time she had to achieve it.

Can you see her asking the board of directors for 2 million for a project without a clear goal?

Can you see her a few months from now trying to keep a group of busy professionals working on a goal they didn't know about and had no input on?

Can you see her making no difference at all after two fiscal years?

Like a blindfolded person trying to walk a straight line, she would most likely end up circling right back where she started.

But by following the scoping process, Hedda has the equivalent of a compass that gives her direction. The scope statement provides clear *shared* expectations for the project, and the built-in feedback loops allow for needed adjustments along the way. There are no guarantees in project work, but now Hedda's chances of getting it right have gone way up. No big whammy for her.

APPLICATION CHALLENGE: KEY STAKEHOLDER INTERVIEW

Use the following blank Key Stakeholder Interview form to interview a key stakeholder on *your* project.

TOOL: KEY STAKEHOLDER INTERVIEWS

Project Name:

Project Purpose	**Feedback Loops**
Why are we doing this project?	Who needs to provide feedback? When and how?
Description	**People Resources**
How would you describe this project?	Who are the key team members?

Desired Results	**Priorities**
What specific outcomes must we achieve to be successful?	How would you prioritize these constraints? (1 = most important) Time: Quality: Budget:
	Time
	When is the project due?
	Quality
	What does “done” look like? How will we know?
	Budget
	What is the budget?
Exclusions	**Acceptance Criteria**
What is out of the project’s scope and should NOT be included?	Who needs to sign off, on what, and when?

TO SUM UP

In short, the first step in project management is scoping, which means getting as much information about the project as possible as early as possible from as many key stakeholders as possible. By scoping, you come to a clear and shared understanding of the purpose and priorities you are serving with your project.

To scope properly, brainstorm a list of all the stakeholders. Then use your Key Stakeholder Interview tool and your Question Funnel to discover their priorities. Document everything in your Project Scope Statement and get written approvals.

CHECK YOUR LEARNING

- ✓ Explain the principle of frontloading. What is the value of frontloading?
- ✓ Can you define what "success" means for your project?
- ✓ Describe how to conduct an effective group stakeholder interview.
- ✓ How do you use the Question Funnel to get clear on exactly what stakeholders want?
- ✓ What are the benefits of the Project Scope Statement?

CHAPTER 4

PLANNING THE PROJECT

The Goal: "Create a clear map for smart decision-making."

OLIVIA WAS THE HUMAN RESOURCES director in a medium-sized American company, and she had a serious problem.

The employees were leaving.

Not just a few, but a lot of them. It felt like a wave crashing on the beach. She was pretty sure she knew why.

The priorities of her colleagues had changed. The economic turbulence of the age had affected them. Instead of sacrificing their whole waking lives to the firm, most of them wanted more time for their families, more time for

renewal—just more time for themselves. The old culture put the organization first. The new culture wanted a different life.

Olivia also knew that the executive team didn't like this new culture. They resisted people who wanted to work from home. The suspicious C-suite figured the employees were taking more and more advantage of them—they wanted the employees in the office where they could keep an eye on them. So top talent was floating toward the exits.

In Olivia's organization, there was really no reason most people couldn't work at home. So long as they did good work, did it matter where they did it? She sympathized but wasn't sure how to solve the problem. Meanwhile, she watched the turnover rate go up, along with the ruinous cost of trying to replace key people.

Then she decided to try the project management approach.

Using the Key Stakeholder Interview tool, she interviewed her key stakeholders—the executive team—individually about the problem. "At this rate, we will have 50 percent turnover in our development group this year," she said. "Replacing them will cost $12 million. What do you think we should do about this?"

"We need to do something to stop it!" the CEO said.

"Would you like me to propose a project for keeping our good people instead of watching them leave us?"

"Absolutely!" the CEO said.

Now she had a project.

In scoping the project, Olivia identified the key stakeholders and interviewed them carefully. She helped the CEO set his priorities and didn't stop interviewing until she was clear about everyone's thinking. Then she delivered a detailed scope statement signed by all the key stakeholders.

Basically, they decided to move to a hybrid work system where employees would work where they could do their best work—at home, at the office, or somewhere else. They would have a lot more flexibility to balance work with other priorities.

Now it was time to plan the project.

Like a compass, the Project Scope Statement tells you what direction to go. Like a road map, the project plan tells you how to get there.

Project planning mostly involves scheduling activities and assigning resources. According to *PMBOK*, the plan document also "identifies the

strategies and actions required to promote productive involvement of stakeholders in project decision-making and execution."[27] So the plan is flexible. You take a "rolling wave" approach to planning. According to project leadership expert Alexander Laufer, "Recognizing that firm commitments cannot be made on the basis of volatile information, you develop plans in waves as the project unfolds and information becomes more reliable."[28] In other words, tests and reviews and feedback over time might and probably will mean changing the plan.

In this chapter you'll find out how to create a flexible project plan so everyone knows what to do. There are two steps:

- Build a risk strategy.
- Create a project schedule.

BUILD A RISK STRATEGY

Are you familiar with Murphy? We all run into him from time to time, especially when we least expect it. According to Murphy's Law, "Anything that can go wrong, will." It's much better to plan for the "what-ifs" than to deal with the pain of "if only." You can keep the "what-ifs" to a minimum by creating a risk-management strategy.

There are three steps to building a risk-management strategy:

1. Identify risks.
2. Prioritize risks.
3. Plan for risks.

Identify Risks

First, identify the risks to the project and then assess their impact. Do this before you put together your project schedule.

List all the things you think could go wrong. Here's a sample list of some of the things that could cause problems with Olivia's project:

- People working at home might feel isolated.
- Data security could be at risk.
- Useful collaboration might not happen.
- Keeping people safe and healthy could become a problem.
- Customer relationships might suffer.
- People working away from the office might slack off.
- People can burn out if they don't put boundaries on their work.
- Olivia could lose her mind.

Any of these risks could affect Olivia's success. Finance, team strength, changing priorities, technology, disruptive innovations, political issues—all of these are potential sources of risk to any project.

Olivia started to feel a little overwhelmed when her team brainstormed the list of risks. How could she ever manage any of these threats? And what if they all became real?

Of course, there's no way she can eliminate all risks to the project. But not all risks deserve equal thought and attention, so Olivia's next step was to prioritize the risks.

Prioritize Risks

Here's the formula for assessing risks to your project:

The following Risk Strategy tool helps you determine which risks definitely need a plan and which ones are less likely to affect the project. Either way, with a plan you'll feel less stress.

How serious is the impact of each risk factor? On a scale of 1–5, would it be "worst case" (5)? Relatively important (4)? Minimal impact (2)?

How probable is the risk factor? Is it going to happen (5)? Is there a fifty-fifty chance that it will happen (3)? Is it unlikely to happen (1)?

Olivia gave each risk factor an impact and probability score. Then she multiplied the scores for each factor.

TOOL: RISK STRATEGY

Project Name: Hybrid Environment **Date**

Identify and Prioritize

List the project risks and score each on a 1–5 scale for Impact and Probability. Multiply those two scores to calculate the total risk score.

	Risk	Impact	Probability	Score
1	*Isolation*	4	3	12
2	*Data insecurity*	4	3	12
3	*Lack of collaboration*	5	2	10
4	*Safety and health*	3	3	9
5	*Customer relationships*	4	4	16
6	*Slacking off*	3	2	6
7	*Burnout*	3	3	9

Olivia figured that customers would probably get lost in this shuffle if their contacts at the organization were all over the place. That would create a big mess.

Another big problem: People working remotely would be connecting personal devices to the organization from all kinds of places. How could the company ensure that its data would stay completely secure?

How well do people work in isolation? Working alone most of the time can make people feel cut off from their friends at work and from the

organization. If people didn't collaborate like they used to, what would happen to creativity and productivity?

Plan for Risks

For the risks she rated 12 and higher, Olivia needed to plan how to TAME them.

TAME is an acronym for the four options you have for managing risk:

- Transfer: Shift the risk to a third party.
- Accept: Acknowledge the risk and deal with it if it occurs.
- Mitigate: Lessen the risk by reducing its probability and/or impact.
- Eliminate: Remove the risk.

For every risk scoring 12 or above, you need a strategy to handle it.

Olivia thought through her options for TAMEing the isolation risk. A little research showed that demographics make a difference. Older employees much preferred working from home, while those who were younger than twenty-five wanted to be at the office. So she decided to MITIGATE the risk by surveying employees and helping individuals plan their work in keeping with their preferences.

She figured that the implications for data security were too complex for her to handle. Nobody inside the IT department felt very confident about it, either. So she decided to TRANSFER the risk by hiring a consultant to advise the IT staff.

Finally, the company risked riling up customers or suppliers who wouldn't be able to find the people they wanted to talk to. They would get lost in the "please hold" maze. To ELIMINATE the risk of exasperating customers, Olivia recommended reconfiguring the entire customer-contact system.

So Olivia created the following risk-management plan. She assigned each strategy to a team member who would own it and account for it.

TOOL: RISK-MANAGEMENT PLAN

Plan a Strategy for High Risks

For each risk scoring 12 or above, create a strategy to handle the risk.

	Risk	Score	Strategy	Who
1	*Isolation*	*12*	*Survey employees; find out what they prefer.*	*Olivia*
2	*Data insecurity*	*12*	*Hire consultant to assess and recommend solutions.*	*Cesar*
5	*Customer relationships*	*16*	*Revise customer-contact system.*	*Val*

Like Olivia, you won't be able to eliminate all risk, but you can TAME most high-level risks with a good risk-management plan. At the same time, resolve to keep an eye on the lower-level risks to make sure they stay below 12 on the scale and don't rise up to overwhelm you.

Communicate your risk-management plan to key stakeholders. Respect for them means they should know what the high-scoring risks are. If the risk of failure is great, you're obligated to communicate it to them.

Communication about risk increases your chance of success. When all stakeholders and team members know the plan, you can all pull together to TAME the risks.

CREATE A PROJECT SCHEDULE

Once you've planned how to manage risk, you can create the project schedule. Just as GPS (Global Positioning System) helps you navigate accurately to a new destination, a project schedule shows you where you're

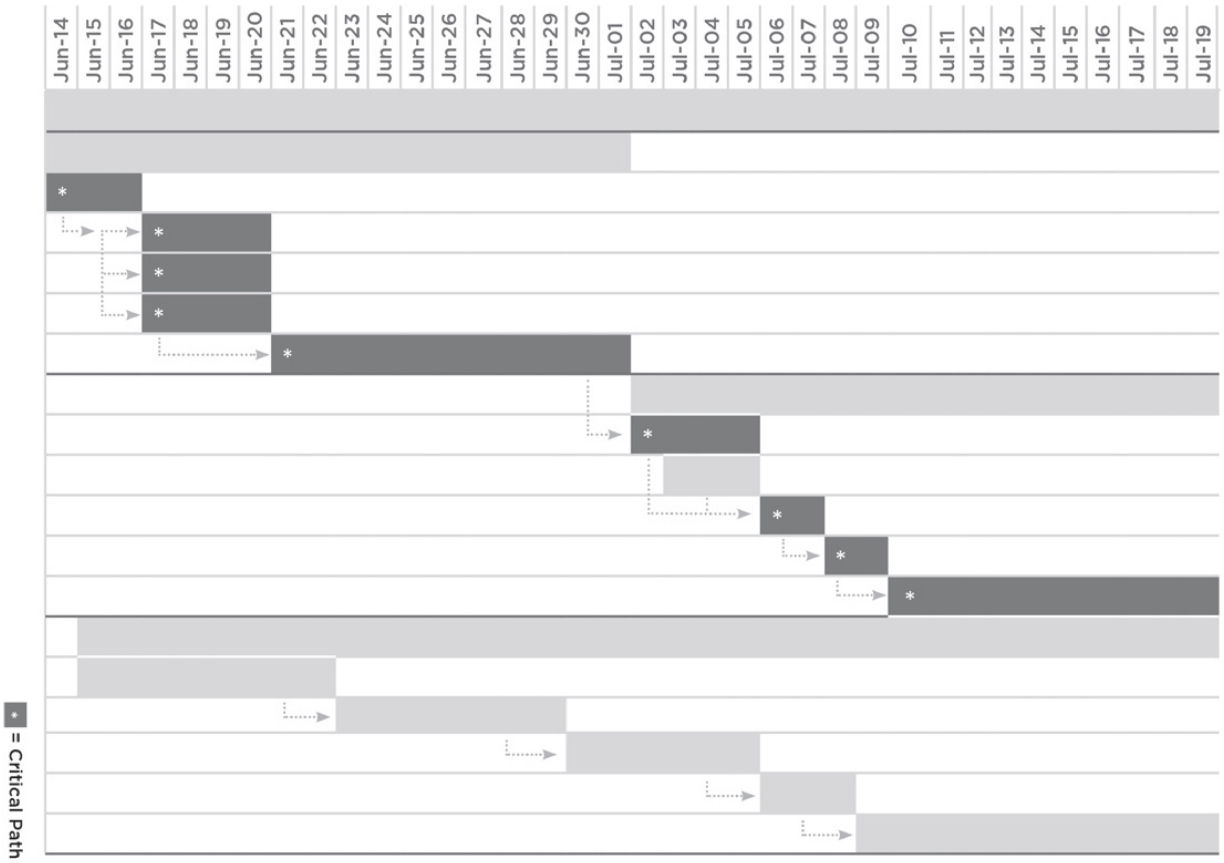
going and how to get there, and allows you to adapt smoothly as things change—which they will.

The purpose of creating a project schedule is to arrive at the "critical path," which is the longest sequence of activities that must start and end on time and be done with quality. It is your most strategic instrument for managing the project.

If you know the critical path, you can control the project like a captain controls a ship—you know what needs to be done, by whom, and by when. If anything on the critical path is late, the whole project will be late. Anything done poorly on the critical path jeopardizes the budget and quality of the project outcome.

When you create a project schedule, the critical path is what you build toward. In a finished project schedule, the critical path is represented by the dark-gray line.

TOOL: PROJECT SCHEDULE



There are many software or online programs that can automatically create the schedule and the critical path for you, which can make your life a lot easier and raise the probability of success. There's an explosion of apps out there to help you build a schedule. Some are expensive and sophisticated, and are more suited to the professional project manager; those would probably frustrate you and slow you down because of the long learning curve required to use them.

Other project management apps are cheaper and less demanding. Because that territory is constantly changing, we won't be recommending particular products, but project management programs should feature at least these few basics:

- A project schedule that spells out who is to do what by when.
- Project tools or templates like the ones in this book.

- Secure file sharing so team members and key stakeholders can share information.

Try a couple out and sample their benefits. Once you clearly understand the steps required to build a project schedule, you'll gain the confidence to give project software or an online program a try.

Here are the steps you take to create the project schedule and arrive at the critical path:

1. Develop the Work Breakdown Structure (WBS).
2. Sequence activities.
3. Identify and assign people to each activity.
4. Estimate the duration of each activity.
5. Identify the critical path.

Project Schedule Step 1. Develop the Work Breakdown Structure (WBS).

The Work Breakdown Structure (WBS) is a list of all the things that go into making the project a success.

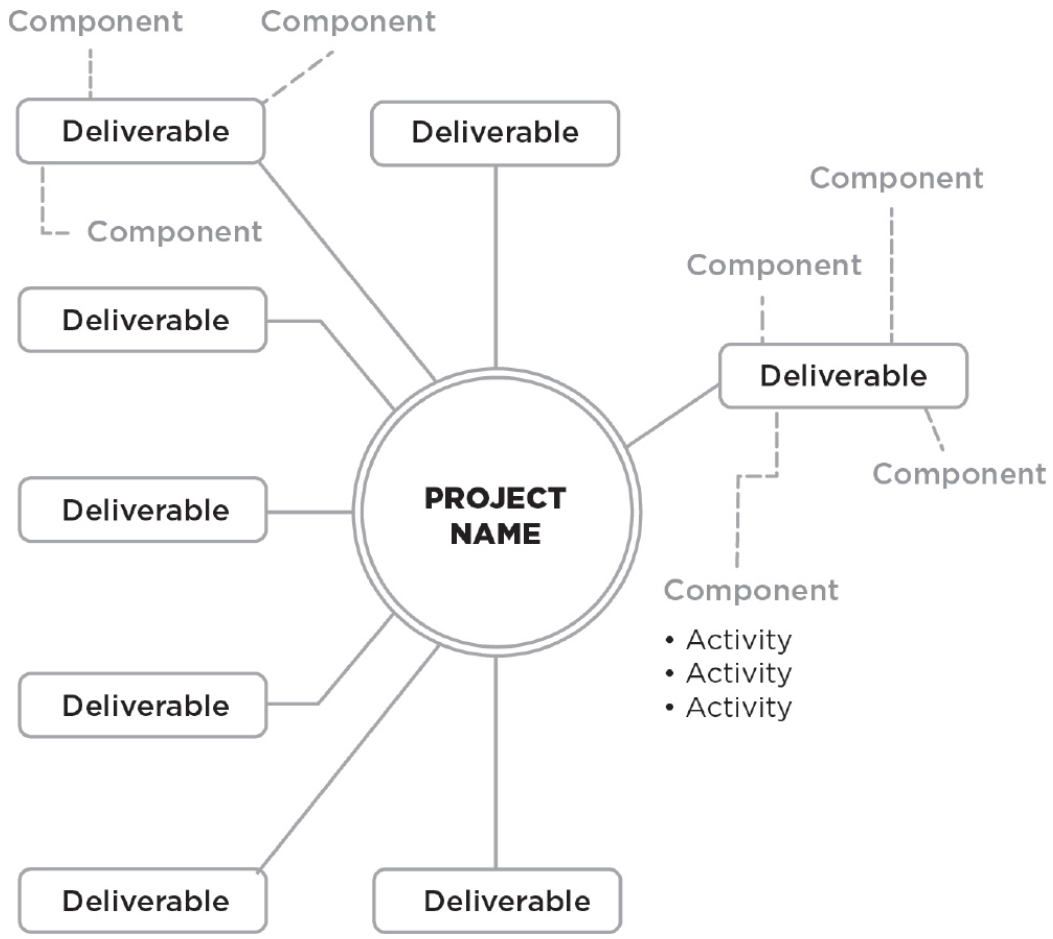
Those "things" are called deliverables. What is a deliverable? It's not a task but a product of some kind. For example, there's a difference between "*buy* a laptop" and a "*laptop*." One is a verb and the other is a noun. A deliverable is always a noun. Once you've decided that a laptop is a deliverable, you can assign someone to deliver it.

When you start the WBS, you might not know all the deliverables that go into your project. So get together and brainstorm.

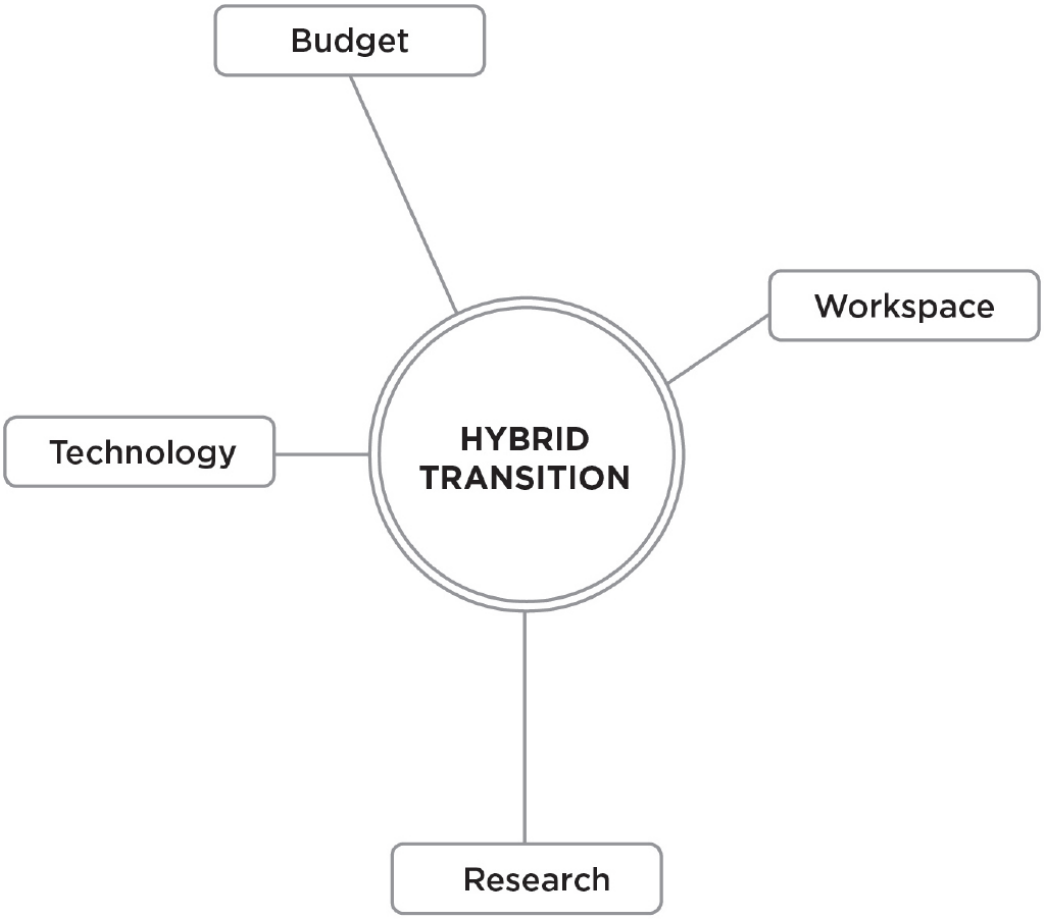
Brainstorm with the project team as well as any other stakeholders you can get to join you. We strongly recommend including customers and suppliers if appropriate so you can get their perspectives as well. Remember the principle of frontloading: Get as much information from as many people as possible as early as possible. Frontloading prevents a lot of heartburn down the road because you cover more ground early and anticipate risks right up front.

We like to brainstorm using a mind map. It allows you to come up with ideas without worrying about putting them in order.

TOOL: MIND MAPS

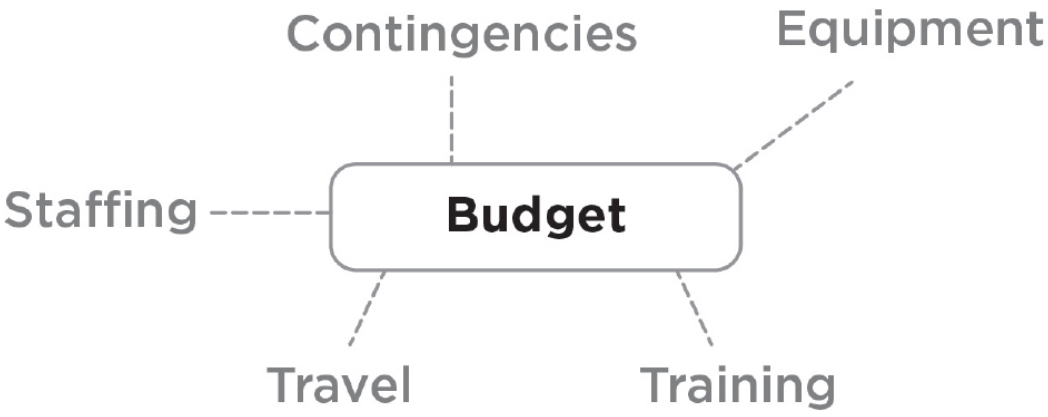


The name of the project goes in the center. From there, you draw lines out to the deliverables that you come up with in your brainstorm. On the next page is Olivia's mind map for transitioning her organization to a hybrid workspace model. Her team must deliver research on best practices, technology solutions, and a new plan for workspace, along with a budget for the transition.



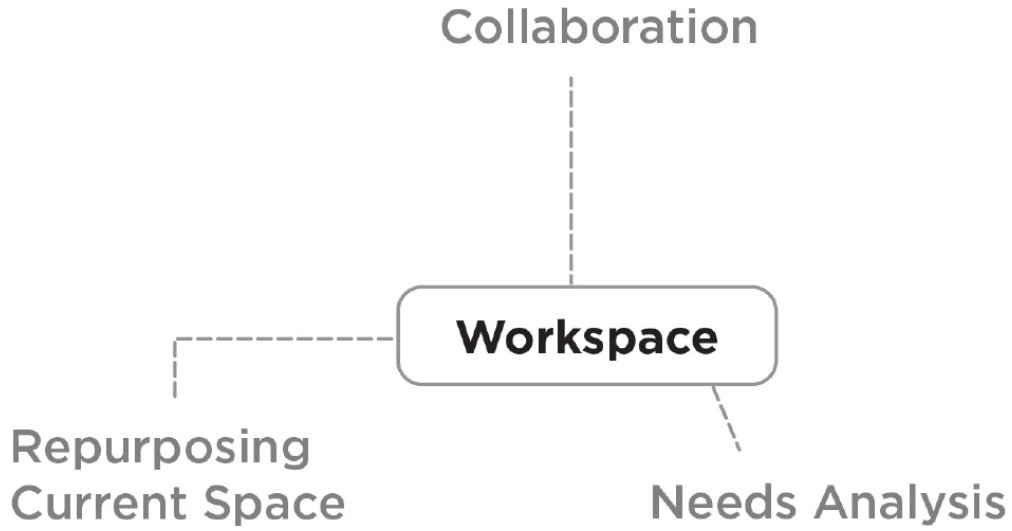
Once you've thought of all your deliverables, brainstorm the components of each deliverable. A component is a deliverable that enables a higher-level deliverable. Let's take one of the deliverables above: budget. What are the components?

For example, you can break down the budget deliverable into these components:



To create the budget, you add together these typical components. Multiply work hours for each staff member and add up their compensation. Add the costs of equipment and services you need to purchase from outside sources. Include travel and training costs. When you've summed all that up, add 10 percent for contingencies.

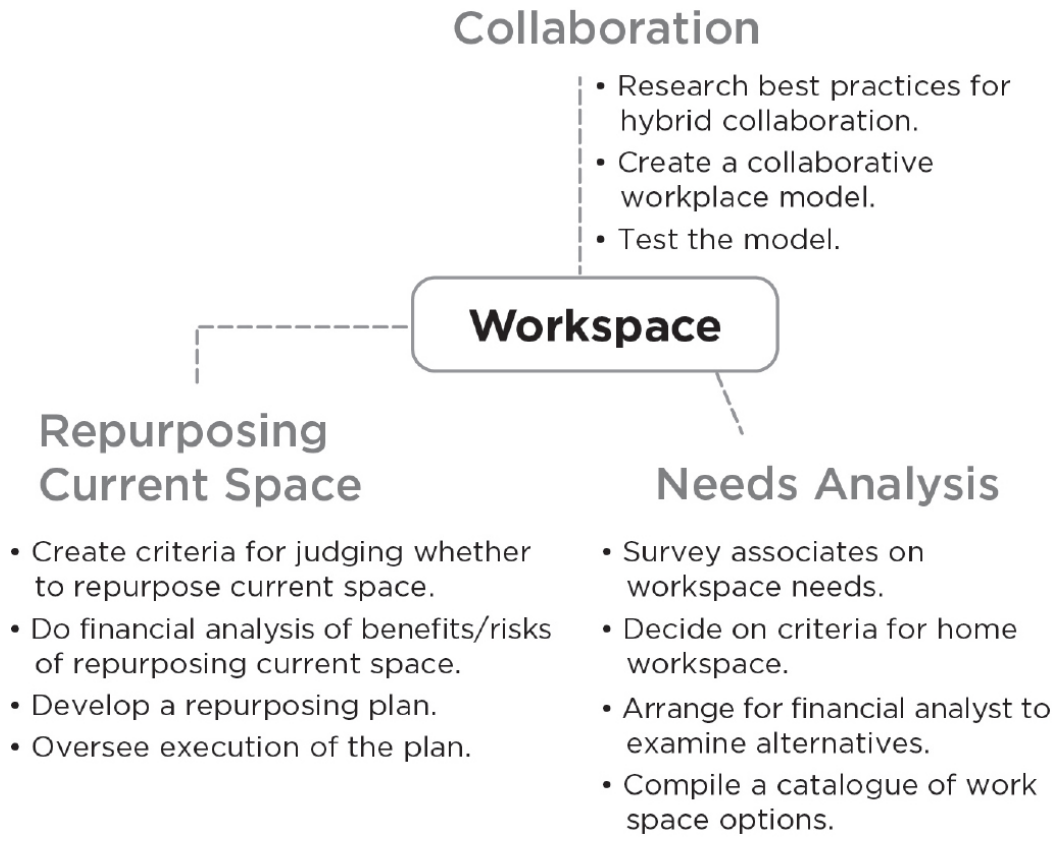
Here's a Work Breakdown Structure for Olivia's transition-to-hybrid project:



With your deliverables and components on the map, you are ready to brainstorm the activities associated with each. Here is a tip: Start each activity with a verb (*create*, *do*, *develop*, *survey*, and so on). Each activity is an action you will take to create the deliverable. Keep brainstorming all the actions you'll have to take to complete each deliverable. Here is an example:

One big issue: How can the company help workers succeed off-site as well as in the office? There are so many questions. Olivia decided on three deliverables:

- A needs analysis of all workers to define their best working location and conditions.
- A decision on how to collaborate in a hybrid environment.
- A plan for repurposing the organization's current block of offices to save on rent and provide workspace for remaining people and activities.



You can do mind mapping in a live meeting, or you can do it remotely. There are dozens of digital mind-mapping programs to choose from, as well as software that lets you brainstorm in lists or on virtual sticky notes. Many project management apps feature mind mapping for this purpose.

The nice thing about mind maps is that your deliverables are grouped topically. But listing and sticky-note software also lets you group and arrange notes in categories.

No matter which method you use, make sure you follow the brainstorming guidelines:

- Go quickly.
- Go for quantity.
- Don't judge ideas.
- Build on the ideas of others.

APPLICATION CHALLENGE: WORK BREAKDOWN STRUCTURE

Start a Work Breakdown Structure for your own project:

1. Brainstorm the project's high-end deliverables.
2. Choose one deliverable and add components.
3. Choose one component and add activities.

Project Schedule Step 2. Sequence Activities.

Some activities can happen at the same time. Others are dependent on other activities.

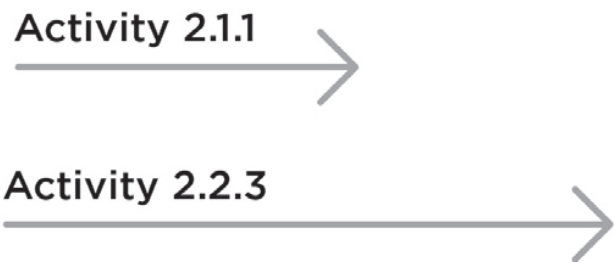
There are different types of dependencies. You will most often use the Finish-to-Start dependency, where one activity must be finished before another can start. You put those activities in the "Predecessor" column of your WBS. For example, developing the plan must come before executing the plan.

ID	Deliverables/Components/ Activities	Predecessor	Work Hours	Duration (Days)	Start Date	End Date	Who
1	WORKSPACE						
1.1	Repurposing current space						
1.1.1	Create criteria						
1.1.2	Financial cost/benefit analysis	1.1.1					
1.1.3	Develop repurposing plan	1.1.1, 1.1.2					
1.1.4	Execute repurposing plan	1.1.3					

"Start-to-Finish"

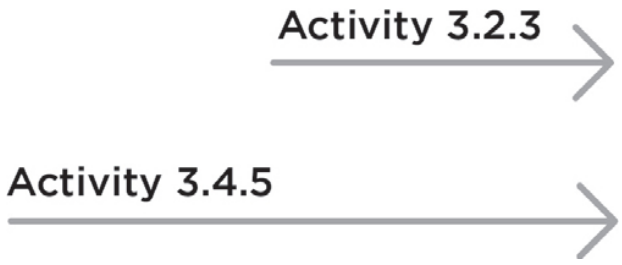
You might need to define other dependencies, such as Start-to-Start activities that overlap. In this dependency, the start of one task triggers the start of another. For example, one person can be doing research on repurposing Olivia's workspace while another is researching best practices for collaboration in a hybrid work model.

"Start-to-Start"



Some activities can't be finished until others are finished: This is a Finish-to-Finish dependency. For example, a new drug trial can't be finished until the last patient has been visited and evaluated.

"Finish-to-Finish"



Project Schedule Step 3. Identify and Assign People to Each Activity.

Now that you know what needs to be done, who's going to do it?

"THE GOAL DEFINES THE TEAM"

The principle here is "the goal defines the team," not the other way around. If you have the luxury of choosing your project team, recruit people who can clearly contribute to your project—and since every project is unique, your team might change from project to project.

When you do have the option to choose your team, a common mistake is to assign whoever is available to the team instead of finding people with the right values and skillsets. Remember to be practical, too—it doesn't hurt to have a few influential people on the team to give your project some cachet in the organization.

In Hedda's case, Lettal Pharmaceuticals abounded in talent, and she had her pick of team members because her CEO, Tesman, was behind her. The problem was that no one wanted to work on a goal to "speed up regulatory approvals." Most of Hedda's colleagues were scientists who had no interest in the project. Frankly, she wasn't too thrilled about it, either.

Filling in her WBS, Hedda soon found herself at a loss. Just about everyone she asked to join the team turned her down. Of course, her assistant, Berta, would do anything she was asked to do and was a lifesaver. But who else could she count on?

Tesman started throwing names at her. But Hedda realized that these were just people who were available, not the best people for the job.

She put off for a week talking to the thorny Dr. Brack. He was the best person for the job by far, as he was the most productive and experienced researcher in the organization—and the most respected. And although he had objected to the whole project in the beginning, he knew it was needed. If she could just get Dr. Brack on the team, others would follow.

She expected him to refuse, too, but to her surprise he was willing. "I guess it is time to shake things up here," he said. "Honestly, I didn't realize until our meeting that we were so far behind the market. Yes, I'll do my best for you."

With Dr. Brack on board, several of his associates volunteered as well. She recruited the firm's two medical writers, Joren and Eilert. They had written all the firm's drug applications and knew the process well. They were also full of ideas for speeding up the process. Thea, the organization's counsel, agreed to help with the legal issues around getting faster approvals. Although a little shy and reserved, Thea had masterful knowledge of the regulations. And Tesman had assigned Rina, a crack finance person, to do the budgeting and financial analysis.

Now Hedda had her core team.

"THIS CAN'T BE GOOD"

Olivia had an even tougher time recruiting *her* team, but not for lack of interest in the project.

As she filled in her WBS, Olivia found it to be a tough task because everyone in the organization was so strapped for time.

She made a list of all her team members' skillsets and realized she still had a few gaps.

"I'm going to add a few people to the team," she told the CEO as they passed in the hall.

"You just reminded me," the CEO said, stopping and turning around. "I need to talk to you about your team. Can we meet for ten minutes? Bring your list of team members and the new people you want to add."

"Okay," Olivia said. *This can't be good*, she thought.

She had her tablet open as she met with the CEO and Maria, the HR director.

"My team members are in the first column, and the second column is the people I want to ask for. With this group, this project can work."

"I see a couple of problems," said the CEO. "We've got two emergency projects going with data security. I've had to put Toby and Viola on them full-time. Also, Maria's got an ongoing personnel problem to solve, so you're going to have less access to her." Maria looked apologetic.

"I've got more bad news, Olivia," she said. "One of your requests, Antonio, gave his notice last night. He told me he was just burned out."

Olivia was angry and tempted to scream and quit in a huff. Nobody was cooperating!

But then she remembered why she was doing this project in the first place. Everyone was overwhelmed, not just her. "I can't believe we're losing Antonio."

"That *is* sad news," said the CEO, turning to Olivia. "I know this is frustrating, Olivia, and I'm sorry to take people away, but I have no choice. Without them, the network will go down and we'll be out of business for a week." Olivia could just feel the big whammy about to fall on her.

Fortunately, Maria had a few ideas for Olivia. "Look, I know you don't know my assistant, Drew, very well, and he takes some getting used to. But he's very conscientious, he knows our people, and you can count on him. We can look at some other possibilities, too."

"At this point, I'm open to anything."

Maria was firm. "Olivia, you've frontloaded this project superbly. You've scoped things so well and worked hard at getting approvals. We're not going to abandon you now."

A half hour later, Olivia had a revised team.

Back at her workstation, she laughed when she caught sight of the Five Foundational Behaviors posted on the wall. She had felt anger, frustration, and overwhelm, but none of these feelings had gotten the better of her. She looked at the behaviors again: "Listen first . . . demonstrate respect."

Maybe I'm finally getting this, she thought, as she picked up her phone to text Drew, her new team member.

Both Hedda's and Olivia's cases show that putting the team together is not always going to go smoothly. A good project scope with buy-in from key

stakeholders puts you in a position to get the people and resources you need.

A clear WBS enables people to take on activities that make sense for them. It also builds your informal authority with your team: You don't always need to be the one "assigning" tasks. The team should review the WBS with you and, when possible, volunteer for assignments.

In keeping with the Five Foundational Behaviors, when team members get to participate in the scheduling, they buy in more readily and stay engaged.

Project Schedule Step 4. Estimate the Duration of Each Activity.

Now that your Work Breakdown Structure is in place and team assignments have been made, the next step is to estimate how long each activity will take. Then you'll know what budget you need and what the actual schedule looks like.

The principle here is that "work" and "duration" are two different things.

WORK ≠ DURATION

Work is the amount of time it takes to do the task. *Duration* is the amount of time it *will* take.

For instance, you might estimate that it will take sixteen hours to paint the walls in an apartment, so you block out sixteen hours for it in your project schedule. But your sixteen-hour block might be unrealistic—do you really have sixteen straight hours?

Will you have other appointments? Online meetings? Family to care for? Meals? *Sleep*?

Duration is the time needed to get the work done, accounting for everything else you need to do in real life. You do what's possible. You might schedule the painting in four-hour shifts over four days, so the duration of the activity is four days, not sixteen hours. Now you can accurately schedule the activity into your plan.

For example, finalizing Olivia's transition-to-hybrid plan might take only a few hours, but the *duration* is over a week. Why? Because it will take that long for key stakeholders to review and vet the plan. Remember: Time is one

of the three constraints (in addition to quality and budget). Unreasonable deadlines can sink a project and often do. Don't try to be a hero and schedule tasks so tightly that there is no "flex" in the schedule. Provide a little breathing space.

Of course, you face the pressure from key stakeholders to "get it done—now!" It helps to answer that pressure with "duration" rather than "work," so they get an accurate sense of how long the project will take.

If your project has a hard-and-fast deadline, work backward from that date to fill in the schedule. Use the duration of activities to determine if the work can be done in the time allotted.

Don't promise to meet a deadline you know you can't meet. Instead, have the "priorities" conversation with stakeholders if the schedule looks too tight. Your integrity is on the line, and that's more important than anything else.

Now, watch out.

Don't make the duration of activities *too* long. You might create a culture of procrastination on the team, with folks waiting until the last minute to get their work done. In project management, we call it Parkinson's Law—"work takes exactly the amount of time allotted for it."

For example, if you think painting the apartment will take four days, but you add another four days "to play it safe," count on it: It will take you eight days. And you'll probably be painting until midnight on the eighth day.

So find the sweet spot when estimating the duration of a task. Here are some suggestions for estimating duration:

- Draw on your experience. You've done projects before, and you know something about painting. Be realistic.
- Ask someone who knows. People who have painted apartments can give you useful estimates.
- Use the PERT formula to figure out how long each activity will take. Despite its imposing name, "Program Evaluation and Review Technique," PERT is a cool tool that helps you cope quickly with uncertainty.

TOOL: PERT

$$\text{DURATION} = (o + 4n + p) / 6$$

It's a simple formula: *o* is the most optimistic duration, *p* is the most pessimistic, and *n* stands for "normal" or "most likely." In PERT, the number 4 balances the common tendency to make unrealistically short estimates of duration. The formula divides by 6 because there are six data points: an optimistic point, a pessimistic point, and four mostlikely points.

But all you need to know is the formula.

Here's how it works: Hedda figures that Rina, a financial whiz, can do a cost/benefit analysis on her deliverable in a day. But given her workload, Rina says it will take her at least a week (five days) or at worst three weeks (fifteen business days) on the outside. So Rina's PERT looks like this:

$$\text{DURATION} = 1 \text{ day} + (4 \times 5 \text{ days}) + 15 \text{ days}$$

Which adds up to 36. Divide 36 by 6 and you get 6. So the estimated duration of Rina's activity is six days on the project schedule.

APPLICATION CHALLENGE: ESTIMATE DURATION OF ACTIVITIES

Referring to your WBS, estimate the duration of the activities required to finish a major deliverable for your project. Use PERT if it would help.

Estimate the duration of all the tasks on the WBS. Now you can enter the activities into the project schedule. This schedule is a bar chart (also known as a Gantt chart) that shows when each activity begins and ends and how activities depend on each other. Olivia assigned each activity to a team member (their initials are in the "Who" column). Now her project schedule looks like the following:

ID	Deliverables/Components/Activities	Predecessor	Duration (Days)	Start Date	End Date	Who
1	**WORKSPACE**					
1.1	Repurposing current space		90	1/15	4/15	O
1.1.1	Create criteria		1	1/15	1/16	D
1.1.2	Financial cost/benefit analysis	1.1.1	6	1/16	1/22	G
1.1.3	Develop repurposing plan	1.1.1, 1.1.2	13	1/23	2/5	D
1.1.4	Execute repurposing plan	1.1.3	70	2/6	4/15	O
2	**RESEARCH**					
2.1	Literature review		25	1/15	2/13	O
2.1.1	Review business publications		20	1/15	2/5	O
2.1.2	Attend Future of Work Forum		3	2/7	2/10	M
2.1.3	Report to stakeholders	2.1.1, 2.1.2	2	2/11	2/13	O
3	**TECHNOLOGY**					
3.1	Assessment of tech for distributed workplaces		35	1/15	2/10	F
3.1.1	Survey current home workspaces		10	1/15	1/25	F, A
3.1.2	Evaluate what others have done		10	1/25	2/5	A
3.1.3	Evaluate apps for distributed workplaces		20	1/15	2/5	F
3.1.4	Recommend tech overhaul	3.1.1, 3.1.2	5	2/5	2/10	F
4	**BUDGET**		30	1/15	2/15	V
4.1	Workspace ROI calculations		15	1/15	1/30	G
4.1.1	Determine average cost/employee		10	1/15	1/25	L
4.1.2	Estimate savings from repurposing current workspace	4.1.1, 4.1.2	2	1/26	1/28	G
4.1.3	Estimate budget	4.1.1, 4.1.2	2	1/30	2/14	V
4.1.4	Take from capital or operations?	4.1.3	1	2/15	2/15	CEO

For tasks that take only hours, we usually round up to one day.

Another, perhaps simpler way to keep your project on track is to set up "milestones" in the schedule. Like a traffic sign, a milestone is a signal that you've reached an important decision point in the project. Driving down a road, you'll see signs that tell you stop, turn, exit, or go back. When you reach a milestone, you have to make that kind of decision.

Without these checkpoints, you can get lost. Think of milestones as the occasional signals your GPS gives you. It doesn't speak to you every step of the way, but it will indicate where and when you're supposed to turn or which road to take. You make indications like these when you set milestones into your project schedule.

You set your own milestones. For example, if you feel the need to bring key stakeholders together at an important decision point, that's a milestone. Put it into your schedule.

For instance, Hedda set milestones to get input from key stakeholders. One of their first steps was to build a working model of an accelerated

process to get drugs to market. It was crucial to get the best thinking from stakeholders about this model before committing to build the real thing. So she calendared issue-gathering meetings throughout the project schedule as key milestones.

Ask yourself, "What are the milestones in my project schedule? Where are the important potential 'turning points'?"

Project Schedule Step 5. Identify the Critical Path.

All the scheduling work you've done now pays off—you've arrived at the final goal of project scheduling—the critical path.

Remember, the critical path is the longest sequence of activities that must start and end on time and be done with quality. Any problem on the critical path threatens the whole project. If any activity on the critical path is late, the whole project will be late.

By identifying the critical path, you can see in advance where bottlenecks might occur that would jeopardize the project.

Once you start executing your project, you'll be fighting the Bottleneck Monster. Remember that some tasks have to be finished before others can start. Hedda can't set a budget before she gets a cost/benefit analysis from Rina. Olivia can't account for upcoming developments in the world of hybrid workspace until Maria reports what she learned at the Future of Work Forum.

If one critical Finish-to-Start activity isn't done on time, you have a bottleneck.

You have one weekend to paint your apartment. In that time, you must buy your paint, move the furniture away from the walls, lay down drop cloths, clean the walls, tape around windows, apply a coat of primer, and wait for it to dry. Only then can you roll on the paint.

	Task	Duration	Comments
1	Buy paint and primer.	2 hours	You can do this anytime and still make your deadline. You might wait for a paint sale.
2	Move furniture away from walls.	1/2 hour	Again, if you can live with this, it can be done in advance.
3	Lay down drop cloths.	1/2 hour	You might do this the night before you prep and paint.
4	Clean walls.	3–6 hours	This is a big undertaking. If you use a sanding machine, it can take half the time of doing it by hand.
5	Tape around windows.	2 hours	This time-consuming task could be done in advance.
6	Apply a coat of primer.	3–6 hours	It depends. Are you rolling paint by hand or spray-painting?
7	Wait for primer to dry.	3 hours	Oil-based primer takes three hours to dry.
8	Apply paint.	3–6 hours	Again, rollers or spray?

If you add up the estimated duration of all the activities, how long will your painting project take? Somewhere between seventeen and twenty-six hours, depending on your method of painting.

Now, what is the *critical path* through your painting project? Activities 1, 2, 3, and 5 can be done before the weekend. Since only activities 4, 6, 7, and 8 must be done in sequence on the weekend, the critical path is the duration of those activities—somewhere between twelve and twenty-one hours.

You might foresee a bottleneck at step 4. If you damage the walls by sanding them, you might have to make repairs. If the old paint turns out to be very resistant, it could take a lot longer than you thought to clean the walls.

Another bottleneck could occur at step 7. If it rains heavily over the weekend, the primer could need a day or so to dry.

Use these tips for avoiding bottlenecks on the critical path:

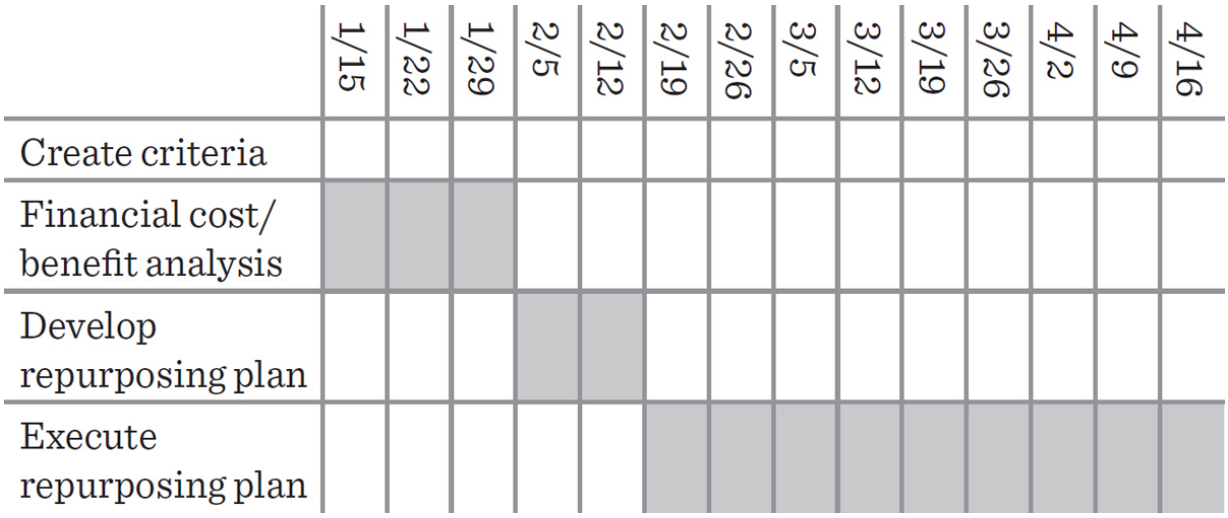
- **Best people.** Put your most trusted, talented, reliable, and engaged people on the critical-path activities.
- **Cross-training.** Make sure more than one person can do critical-path activities—this means training people to do more than one job. Who will do activity A if the best person becomes unavailable?
- **Team Accountability Sessions.** Huddle regularly as a team to ensure the critical path is on target. Huddles will help you spot bottlenecks and minimize fires that break out along the path. (We will talk more about team accountability later.)

Doing the work to identify an accurate critical path provides three amazing benefits.

First, the project schedule becomes a strategic management tool. You can identify which team members are needed when, move people around when pressures or potential opportunities arise, and stay on target for delivering the value you promised to deliver.

Second, you can identify activities that could be done anytime and are *not* part of the critical path (these activities are called “slack” or “float”). Third, you can anticipate and plan for bottlenecks on the critical path.

Your project management program can probably calculate your critical path instantly. It might look like this:



WHAT SCHEDULING PROGRAMS SHOULD I USE?

As we've said, programs and apps for scheduling projects have proliferated in the past few years. Most project schedules are created in a bar chart (or Gantt chart), which displays visually the project's timeline and tasks on one screen. You can see the start and end dates and the tasks scheduled for a given day, culminating in a valuable critical path!

Present findings 2/16–2/20	Produce second draft 3/30–4/30 Janae, Pier, Liu, Vanka	Select design 2/28–3/15 entire team	Do third-level edit (proofing) 5/21–5/30 Kamal

Any of the existing scheduling programs might be useful to you. New ones get released frequently, which makes project management easy to understand and helps you collaborate at a glance with the rest of your team.

Our goal here is to encourage you to give scheduling programs a try. The program will be your best friend if you apply the basic principles of project scheduling: Identify tasks and duration, identify dependencies between tasks, assign resources to each task, and define the critical path. Then track your progress and adapt as needed.

TO SUM UP

In short, the second step in project management is planning. Here you calculate the cost, take stock of the risks of failure, and create a project schedule by which you can lead the team to success on time and on budget.

To plan properly, use your Risk Strategy and Risk-Management Plan to anticipate and TAME problems that might derail your project. Then follow the five steps for scheduling the project:

1. Develop the Work Breakdown Structure (WBS).
2. Sequence activities.
3. Identify and assign people to each activity.
4. Estimate the duration of each activity.
5. Identify the critical path.

The better you plan, the more likely your project will succeed. That's just basic reality. But don't expect or even hope for things to go *exactly* according to plan. Invite feedback to generate adaptations along the way that will enhance the value of the project.

CHECK YOUR LEARNING

- How do you identify risks to your project before they arise? How do you create a risk-management strategy? How will you TAME the risks to your project?
- How do you break a project down into manageable activities?
- What's the difference between the time needed to do a task and the "duration" of the task? How do you estimate the duration of an activity?

- [ ] What is the “critical path”? What are some ways to protect the critical path?

CHAPTER 5

ENGAGING THE TEAM

The Goal: "Inspire shared accountability."

NOW THE QUESTION FOR YOU as an unofficial project manager is, how do you get and keep a team focused on and passionately executing *your* project?

According to *PMBOK*, effective project managers lead their project teams to "a high level of performance."[29] That requires team members who are not only skilled but also highly engaged. In this chapter you'll find out how to keep the team engaged in project success. There are two key activities:

- Create a cadence of accountability.
- Hold Performance Conversations.

CREATE A CADENCE OF ACCOUNTABILITY

What does it take to execute the project successfully *as a team*? How do you keep the team fixed on the goal? How do you keep them alert, absorbed, and motivated?

In a word: accountability.

Most people shrink away when they hear that word. It's a negative word. They see Mom or Dad sending them to bed without supper or the boss standing ominously in the office door staring at them. As an unofficial project manager, you likely don't have much formal authority over your team members. You are not Mom or Dad or the boss.

But the principle of accountability is simple: When you keep your commitments, you become a trustworthy human being. You gain the trust of your team members, who will be encouraged to keep their commitments as well. You also gain the trust of your stakeholders, who will be motivated to keep their commitments to you. You're living the definition of informal authority when you inspire people to *choose* to play on your team. Accountability starts with *you*.

By keeping your own commitments regularly and consistently, you can consistently hold people accountable for theirs. It might surprise you, but strict accountability makes people *more* engaged, not less.

DEATH BY WHIRLWIND

How many great projects are launched with cheers and banners and T-shirts and giveaway pens, and then they just fade away into memory like an old picnic at the park? Maybe you even find the dusty old giveaway pen in your drawer one day and you think, *Whatever happened to that project?*

Usually, the project died not because it was a bad idea but because people had too much other stuff to do and weren't being held accountable for

it. More and more often, projects are cross-functional, drawing teams together from all over the organization. The downside of cross-functional teams is that the team members have other jobs to do. You end up overwhelmed with priorities coming at you from different directions—we call it the "daily whirlwind."

When you're pulled all over the place by the whirlwind, it's easy to focus on what is right in front of you. If your commitment to the project isn't front and center all the time, it will slip away in a heavy breeze.

When people know they will be held accountable for their promises *regularly* and *often*, they are much more likely to perform. But if that doesn't happen, they won't think you're serious, and they will fly off into the whirlwind.

Ideally, team members hold *each other* accountable before management does. When they realize they'll be accounting to their team regularly and often, they're more likely to play. When they choose their own commitments, they become more engaged. When they decide for themselves how to balance the project with their whirlwind, they become more laser focused.

You can make all that happen, but you will have to lead the way by creating a "cadence of accountability."

A cadence is a regular and repeated pattern of activity.

The key to engaging the team is to hold regular and frequent Team Accountability Sessions, thus setting in place a cadence of accountability. These meetings are totally different from the typical "project status meetings." In such meetings, the boss usually tells team members what their commitments are going to be, resulting in the death of engagement.

This chart illustrates the differences:

Typical Project Status Meeting	**Team Accountability Session**
We meet occasionally at random times.	We meet regularly and often.
We chat. We sit around waiting for everybody to show up. We complain about how busy we are.	We focus on the project schedule. Are we where we're supposed to be? If not, why not?
We point fingers at others and make excuses for our lack of follow-through.	We *report on* the commitments we chose to make in the previous session to move the project forward.

The project manager tells us what our commitments are going to be.	We *choose* the commitments we will make to move the project forward.
The project manager waits and watches to see if we will keep our commitments.	The project manager commits to clear the path so we can keep our commitments.

We call it a Team Accountability Session. You can call it a huddle or a quick-check meeting. In the Agile Method, it's called a Daily Standup Meeting or "Daily Scrum," a term taken from the game of rugby. In a scrum, rugby players start a play by packing close together with heads down, trying to get possession of the ball. For our purposes, a daily or weekly "scrum" is a fast-paced meeting where incremental goals are set and everyone commits to do something to meet the goal.

This scrum resembles the huddle in gridiron football, where the players cluster together between plays and decide what their next objective is and who's going to do what to get there.

This meeting goes by *fast*. This is not a strategy session. It's not the typical "staff meeting." It's all about "moving the ball"—the project schedule—forward. It's usually incremental, with a focus on the next day's or the next week's work. It's a quick, high-focus huddle to see if we're winning or losing—mostly to find out if we're on track or if anybody needs help.

Depending on your project, you may need to hold these sessions daily, several times a day, or every other day. But we strongly recommend that you don't let a week go by without a Team Accountability Session, or, like the airplane that's one degree off course, you'll be heading into a storm that won't be pleasant.

One organization we worked with held a "micro" session twice a day every day, at 9 a.m. and 3 p.m. They were monitoring progress on the production of machine parts. Each part took less than a day to make, but each was crucial to the project. So twice a day, a small subset of the core team met to ensure the required part had been produced and that they were ready to complete the next part on time.

So, do these four things in every session:

1. **Review the project schedule as a team.** Treat it like a scoreboard in a game: Is our team losing or winning? Where are we falling behind? Why are we falling behind? If you're using a project program that includes a scoreboard, team members can check it even before the meeting.
2. **Report on commitments made in the previous session.** Recognize successes. If someone misses a commitment, find out why—not to blame the person, but to figure out together how to overcome whatever obstacle is in the path.
3. **Make commitments to keep the schedule moving.** Ideally, team members make their own commitments without being assigned. As project leader, question these commitments. See if the team agrees on them. If the team member isn't sure what to do next, the team can help.
4. **Clear the path.** Determine who's going to do what to clear away any obstacles you've identified. Often the project leader is the only one who can do this—finding resources, fixing budgets, clearing up organizational issues, and so forth. But team members might be able to clear the path for other team members who lack a certain skill or relationship.

That's it. Four things that you can usually do in a few minutes. Of course, some sessions take longer if the issues warrant it, but strive for speed and efficiency. If you can do it in twenty minutes, don't take thirty.

What are the benefits of the Team Accountability Session?

- The team members always know if they are winning or losing the game, which is motivating in itself. The project schedule becomes their "scoreboard," and they will want to drive up the score. The threat of the big whammy recedes into the distance.
- Team members know that they will be accounting to the team for their promises. A spirit of accountability naturally grows stronger. The cadence keeps team members from feeling isolated and reminds them that their commitments matter.

- Team members come up with their own commitments, thus feeling more ownership of the project. When the team ratifies their commitments, they feel more confident that their contribution will be valued.
- A spirit of helpfulness comes over the team as members discuss and decide how to clear the path for each other. They know they can get help if the "whirlwind" threatens to overwhelm them. And they worry less about failure because they know the others will jump in to help if they encounter problems along the path.

The accountability session shows that you care about the project. How often do we get asked to do something at work that nobody actually cares that much about? When we take on assignments, accept meetings, and make commitments, we silently ask ourselves, *I wonder how much this really matters?* and then we wait for proof that it does.

Great project managers prove that every request, every commitment, every missed deadline matters. And in doing so, they earn high levels of respect and follow-through from the team.

The accountability session also surfaces problems quickly so you can deal with them quickly *as a team*. Because lots of problems arise when you're carrying out a project, nobody should feel like they have to solve them alone. Seth Godin has this insight: "As the project gets built, our instinct is to hide. Hide our roadblocks, our mistakes, our worries. As we hide, we keep the rest of the team in the dark. As the darkness settles in, it's easier than ever to keep hiding, because to unhide now is double the trouble."[30]

Projects often stumble because people stumble. They get lost, they run into roadblocks, they get diverted. Your job as leader is not to manage them but to help them manage themselves. That means "clearing the path" for them, making it possible for them to keep their commitments.

The cadence of accountability is vital to project success. A team in cadence marches together. They are going to win. Everybody knows what's expected when and how to achieve it. No one person is responsible; no one person gets the glory or takes the fall. Everybody moves forward together; anyone who needs help gets the whole team's support.

Your team might be in the same room with you, but more likely they're all over the place—probably even scattered around the world. Online workspaces have become part of the norm and make it possible for the team to work together as if they were in the same room. You or anyone on the team can access all the project information. The team can see the project schedule, add in their commitments, and tell at all times if they're on track.

WAKING FROM A NIGHTMARE

Hedda's project was in trouble. After a full year, she had little progress to show for all her efforts. Nothing of substance had changed about the product-approval process, and she had only one fiscal year left to show results. Her boss, Tesman, noted the problem and called for a project status meeting on a Friday afternoon.

Hedda was mortified. "This project really needs a full-time leader, and I already have a full-time job," she complained. "The last three months have been a nightmare trying to deal with the agency queries about the migraine drug. It's taken me day and all night. I haven't had a minute to think about this project."

It was the same story from the other team members. The writers were swamped. The legal counsel had no time. As for Dr. Brack, he was buried in the lab with dozens of bench scientists. "We've got ten products in the pipeline," he said. "Do you realize how much testing we have to do?"

Tesman stood fast. "We all committed to a goal of 67 percent faster approval time by a year from now. If we fail, we might as well stop working on the pipeline because we'll be closing our doors. This project is *wildly* important to the future of this firm. Now, how can we get it done?"

There was silence in the room. The only sounds were the background noises from the videoconference.

Tesman spoke again. "Here's what I propose we do. Every Monday morning from now on, this team will meet. We should do four things.

"First, let's review the project schedule to see where we are. If we're behind, we'll find out why and discuss what to do to get back on track.

"Second, let's review the commitments we've made to move the schedule forward. If for some reason some haven't been able to keep their commitments, we'll explore why and figure out a way to help.

"Third, let's each make specific commitments each week to move the project forward. Ideally, each team member will know generally what needs to be done and what else they have to do for their jobs. So everyone should choose their own commitments.

"Fourth, if there are barriers to keeping our commitments, we will figure out how to clear them away. If there are barriers only I can remove, I will. But we should also commit to clear the path for each other.

"This meeting should last no more than one half hour. If we need to discuss some issues in more depth, we'll do it elsewhere. But Monday mornings we'll keep to this agenda, so it won't be just another time-consuming meeting.

"Is it all right with you, Hedda, if you lead the first session? Then we can trade off if you'd like."

Her face flushed. Feeling confused but hopeful, Hedda agreed. To record the Monday session, she prepared the following tool.

TOOL: TEAM ACCOUNTABILITY SESSION

Date

Project Schedule Issues

Report on Commitments

Make New Commitments

Clear the Path

With this tool, Hedda could record and follow up on all the team commitments each week.

A TEAM ACCOUNTABILITY SESSION

"Good morning, we have half an hour to review our schedule and make commitments to move forward. This is a short meeting because we want to stay focused. We don't need another unproductive meeting on our schedule." Hedda started out with a little shake in her voice. She hadn't done this before.

They were way behind on their project schedule, as they already knew. "As you can see, so far we've made progress on a couple of deliverables, but we have a long way to go to catch up. So let's see what commitments we can make to that end. Dr. Brack, let's start with you."

A veteran researcher and looking like it, Dr. Brack rubbed his grizzled chin and said, "We've got these ten projects in the pipeline. I've been

thinking about how some of them could be accelerated. I'd like to identify them and create a revised schedule to move them along faster. And that's my commitment."

Hedda was relieved. She'd half expected Dr. Brack to unsettle the meeting somehow, but he was on board with the ground rules. A professional all the way.

Several team members on videoconference made substantial commitments. And Tesman, the CEO, committed to bring in a consulting firm that specialized in their predicament. Then it was Rina's turn. Hedda trusted Rina's skills.

"I've got a lot going on. I have to complete my part of the organization audit this week, so I commit to doing that."

Hedda hesitated. "Rina, I know that's crucial work, but how does it help us move *our* project forward?"

Rina was sharp. She laughed a little and said, "Of course, I see what you mean. Well . . . I probably need to update the cost/benefit analysis that's nearly a year old. I think I can commit to doing that on top of the audit."

"Thanks, Rina." Hedda sighed. She knew how hard Rina worked.

The rest of the session went well. By reviewing the project schedule, everyone could see what deliverables they were responsible for and renew their commitments to deliver. Hedda was pleased that everyone was so cooperative and that they were buying into the process—until it was the turn of the medical writers, Joren and Eilert.

Joren began, "We committed to deliver an accelerated process for writing submissions. We have always assumed we couldn't start writing the application until the drug trials were finished. I mean, we had no data until then, so how could we start earlier?

"But I think we *can* start earlier. The hardest part to write is the toxicology report—where we present the data about whether the drug will, you know, poison the patient or not. It always takes us more time than any of the other sections. We have to prove the drug is safe.

"Well, suppose we started writing the tox report as soon as we start developing the drug? I mean, we've had a lot of experience. We can usually anticipate what we need to put into the report, all the graphs and illustrations and so forth. Why not get a head start by creating a dummy report and then just filling in the data as it comes? It would save boatloads of time."

Eilert's face reddened. "It can't be done. It's ridiculous to even try. How can we possibly guess at something like that? It's the most important part of the submission—it tells the regulators if we're going to make patients sicker or even kill them!"

Hedda looked to Tesman for help, but Tesman just looked back at Hedda. She was the project leader, and it was her job to make it work.

She hesitated.

"Joren," she said, "what's your commitment here?"

Dismayed by his colleague, Joren sheepishly said, "I guess I commit to creating a dummy tox report."

"Let's call it a *prototype* tox report, shall we?" Tesman smirked, and the tension lifted a bit.

"No, *dummy is* the right word for it." Eilert got up and walked out of the meeting.

Hedda wound things up. The meeting left a big anxious hole inside her. How was she going to deal with this conflict? She couldn't lose Eilert. Deep down she knew he was a better writer than Joren, who was more of a plodder, although very reliable.

THE FOUNDATIONAL BEHAVIORS AND TEAM ACCOUNTABILITY

So Hedda had a problem with a team member. What if you have such a problem? Somebody who's always downbeat or unhelpful? Or somebody who doesn't pull their weight? Or somebody who is downright destructive? What happens to the project when team members fall apart on you?

You have lots of choices. You can sack them from the team. You can shame them, reprimand them, or ignore them and hope they go away. But none of these reactive choices is going to build up your informal authority.

You hold them accountable through the Five Foundational Behaviors. When you forget to practice them, you might win a battle with somebody but end up losing the war.

When things get hard to handle with a team member, you're going to feel disappointed, frustrated, or angry. If you let these emotions overwhelm you—

and you unload them on the team member—you have *really* lost the war.

Have you ever hit the Send button on a text when you're angry? It feels great in the moment, but later you wish you could recall it? How much damage have you just done to a relationship or even your professional life? It's okay to feel disappointment, frustration, and anger, but a good leader can manage those emotions.

Remember, your job is not just to finish a project—it's also to build a great project team. And that means building people up, especially when times get tough.

So how *do* you hold people accountable who aren't holding themselves accountable? You must first hold *yourself* accountable to the Five Foundational Behaviors.

Suppose a team member comes to the Team Accountability Session and says they just couldn't keep their promise that week. First, what is the downside of doing nothing about it? What are you teaching the team? You're teaching them that commitments don't matter. You're teaching them that they can let *their* commitments slide, too. What about the people who do keep their commitments? They start to lose respect for *you*.

Once *you* violate the Five Behaviors, you will no longer have a team that honors the behaviors.

So the first time someone misses a commitment, use the Five Behaviors to find out what's getting in the way:

Listen first. Let the team member describe why the commitment was missed. Listen carefully. "The auditors dropped a pile of requests on me, and I ran out of time." Respectfully restate to make sure you understand: "So the audit occupied your entire week."

Clarify expectations. Restate the commitment and update the deadline for completion. "We really need that new component. Would Wednesday be too soon?"

Extend trust. Don't let the team member get discouraged or disheartened. Gently express confidence. "You're the best one for this job. We'll be counting on you."

Practice accountability. Make sure the team member understands the specific impact of their actions. “Okay, so we’ll have the component at least by Thursday. We’re already a week behind, and we can’t move forward without it.” Offer to clear the path if needed.

Demonstrate respect. Acknowledge the reality of competing demands. Be empathic about the situation. “We all know what it means to have the auditors come on-site.”

By consistently holding people accountable in the Team Accountability Session, you do two important things to build your team:

- The team member will learn to “own” the problem. They will understand that they let the *team* down, not just themselves or you.
- The rest of the team will watch this and think, *I don’t want to put myself in that position*.

This is pure accountability on the team level. All team members strengthen their resolve to bring their best efforts to the team and the project.

APPLICATION CHALLENGE: HOLD A TEAM ACCOUNTABILITY SESSION

Use the following Team Accountability Session tool to role play a session on your project.

TOOL: TEAM ACCOUNTABILITY SESSION

Date

Project Schedule Issues

Report on Commitments

Make New Commitments

Clear the Path

HOLD PERFORMANCE CONVERSATIONS

Now, what if a team member like Eilert disrupts the project? What if a team member is consistently negative? What if you have a chronic problem with a team member who doesn't keep commitments?

You will have to take the next step: a Performance Conversation. Use this tool to prepare for a private conversation with that person.

TOOL: PERFORMANCE CONVERSATION PLANNER

With Whom	**When**
What Is My Intent?	

What Are the Facts of the Situation?	**What Is the Impact on the Project?**
Action Items	**By Whom**

Let’s explain this tool.

What is your intent? The Performance Conversation Planner asks you to define your intent first. Why are you asking for the conversation? You do this for two important reasons: First, to clarify your agenda for yourself. Second, you want to ensure that the conversation is only about the outcomes of the project.

What are the facts? Next, think through the facts you need to share and record them. These are observable events, not opinions. Make sure you are prepared to provide examples or evidence of the behavior at issue or mistakes made.

What is the impact? Be prepared to articulate the impact these facts have on the project so the team member clearly understands the big picture.

Now you can hold an effective conversation. Getting clear on how your end of the conversation will go is a great way to calm down and communicate professionally. And if you *demonstrate respect* throughout, you are more likely to get the results you want.

Clearly, and in a firm but inviting tone of voice, state your intent and the facts. This is *clarifying* the problem. Then pause. Give the team member time to process the information and let it sink in. Then listen—really listen—to their point of view on the facts.

Listen with empathy. Put yourself in the team member's place and understand their point of view the best you can. Sit back and be quiet. If you listen quietly, you give the other person a chance to get their emotions out in the open and decompress—you don't have to agree, disagree, or defend yourself—and you might be learning something valuable. Just listening gives you a chance to find out why the person isn't performing.

What are the action items? Once the person feels understood, ask them for suggestions on how to solve the problem and *clarify expectations*. Usually, they'll know what to suggest. Then lay out in clear and specific terms what you expect from them and what they can expect from you. *Practice accountability* by agreeing on specific action items and deadlines. Set an appointment for reviewing progress on those expectations. Make sure they know you'll be following up on a certain date.

Extend trust by expressing confidence in them. Even if you have misgivings about them, don't give up on people except as a last resort. Remember, you're building not only a project but also a project *team*.

Now let's see how Hedda handles a Performance Conversation with Eilert, the headstrong medical writer who balks at developing an important component of the project. First, she gets very clear on her own intent. Then she records the facts and their impact on the project as clearly as possible.

TOOL: PERFORMANCE CONVERSATION PLANNER

With Whom Eilert Lovborg	**When** June 1
What Is My Intent?	
• To find out what Eilert will commit to do in relation to the prototype submission process. • To ascertain if Eilert will recommit to keeping the ground rules we agreed on for this project.	
What Are the Facts of the Situation?	**What Is the Impact on the Project?**
In the May 28 Team Accountability Session, Eilert spoke with great energy against a proposed component of the submission process. He appeared to be angry. He then left the meeting without explanation and without making further commitments.	• When Eilert violated the ground rules, he undermined team morale and threatened the success of the project. • By refusing to commit to advancing the project schedule, he threatens to delay the project.

A HIGH-STAKES PERFORMANCE CONVERSATION

Hedda met with Eilert on the morning of June 1 in a private conference room. She read to him her intent, the facts as she saw them, and the impact of those facts on the project. She then invited him to respond.

Eilert fidgeted with his blond hair, sitting unsteadily in his chair. Hedda sat back to listen.

"Like I said, you can't write a tox report until you have the tox data. It's totally backward. Joren doesn't know what he's doing, anyway. I've worked

with him for a couple of years now, and he never listens to reality. He just sits there with his stone face, and nothing seems to seep in.

"How many times have I shared an idea with *him* and he just shuts me down. He never says, 'No, that won't work' or 'We can't do that'—he just ignores me. And then he comes up with this silly notion that you can report tox data before you have it, and everybody nods and smiles and says, 'Go right ahead, Joren. That sounds good, Joren.' It makes me wonder if I'm the only sane person in the room." Eilert stopped talking to catch his breath.

Hedda now saw that there was a good deal more going on here than mere disagreement over a proposal. There were personal things to deal with.

"If I understand you, Joren has never listened to your ideas and ignores you, so it's ironic that an idea of *his* gets a hearing—an idea you consider impossible and illogical. It's like an upside-down world."

"That's exactly right." Eilert sat up—he felt that someone had finally heard him. "I have ideas too, lots of ideas for speeding up the writing process. But he won't listen to them, and since he's the senior writer, he's the one who gets his ideas out there."

"The team isn't getting the benefit of your ideas because Joren blocks them." Hedda wanted to understand clearly what was going on.

"Well, I'm not sure he's blocking them. It's like he doesn't even *hear* them."

"So you feel that it's not that he deliberately blocks you—it's that he doesn't listen well."

"Yes. I mean, he has good ideas. His idea to get an early start on tox reports isn't bad. I suppose it could be done. It's just that I have good ideas, too."

Hedda and Eilert settled on a few action items.

Action Items	**By Whom**
Hold a Performance Conversation with Joren about his style of working with Eilert.	Hedda
Commit to collaborate with Joren on the toxicology report prototype.	Eilert
Hold a special team meeting so Eilert can present his ideas for speeding up the writing process.	Hedda will arrange.

Recommit immediately to the Five Foundational Behaviors as ground rules for the team.	Eilert

In this way, Hedda was able to bring Eilert back into the team as a productive member. Many of his ideas turned out to be useful—some were brilliant. Eilert carefully followed the ground rules from then on, with only a few lapses now and then. He was an energetic character.

Hedda also held a Performance Conversation with Joren to get to the root of his treatment of Eilert. It turned out that Joren didn't realize he was ignoring Eilert's ideas, and he committed to demonstrate more respect and to listen better to his colleagues.

As Joren and Eilert returned to work together, they listened respectfully to each other. They decided to use a "rolling wave" process for writing reports. They drafted a whole report up front, and then as data "rolled" toward them like waves in the sea, they incorporated it into the draft. This process saved a lot of time.

Hedda had more than a few such conversations with team members over the next year. She brought Rina in to talk about late legal filings. She had to speak with Dr. Brack a couple of times about his tendency to dismiss other team members' comments as not worth listening to. And there was one touchy conversation about a relationship that was getting a little *too* close—she invited the HR director to sit in on that one.

What would have happened if Hedda didn't have the Performance Conversation tool? What if there were no ground rules? We can only guess, but the shadow of the big whammy would undoubtedly have grown darker all the time.

You've seen how this method works for hard conversations, but the Performance Conversation tool can be used to plan positive conversations, too. You might be wondering, *Why would I ever need to plan a positive conversation?*

Think about the last time someone gave you positive feedback. Likely you heard, "Good work!" or "Nice job!" You felt good but still wondered, *What part of my job was nice?*

Take your informal authority up a notch by giving specific positive feedback the right way. Declare your intent, and share the facts and impact of

the good work. When you tell people exactly what they did that was great and how it affected the project, you build the relationship and encourage them to replicate their good work. You'll build momentum on the project.

A NERVOUS MEETING

Drew sat outside the project room. He was waiting for Olivia, who had asked to meet him there. He wasn't sure what the meeting was about. He was an assistant human resources manager, yet strangely enough, not much of a people person. He took things very personally and worried that he had done something wrong.

"Drew!" Olivia turned the corner. "Thanks for waiting. It has been a crazy day."

"No problem," Drew said, shakily. "What's up? Do you need me to do something?"

"No," Olivia said. "No new assignments today. In fact, I asked you here to thank you."

They both sat down, and Olivia pulled up her project folder on her laptop. "Drew, you've been doing great work on the survey, and we've been so busy I didn't want to miss letting you know what a big impact you've had on this project."

Drew smiled weakly, but he felt a little uncomfortable. No one had ever called him to a formal meeting just to thank him for something. He braced himself for the *real* reason for this meeting—he was sure Olivia was softening him up for bad news.

Olivia went on. "There are a couple of specific things I noticed while you were working on the survey. First, I was so impressed with how you engaged Val and Jack. In fact, they mentioned to me how much they enjoyed working with you. They told me you were clear about what was needed, you checked in with them regularly, and you stopped to help them when they were off track. As a result, the three of you got the survey done on time. That's impressive feedback."

Drew was gradually growing less tense and uncommonly happy.

"One more thing," Olivia said. "After working so hard, I'm sure you were exhausted. You had every reason to take a break, and I wouldn't have thought anything of it if you did. Instead, you came to me and asked what we needed done now. With Maria off on sick leave, we were falling behind on the training plan, but because you pitched in, we got it back on track."

"It was nothing," Drew said. "I just want to help the team."

"You *are* helping. You've been contributing every step of the way. I just wanted you to know your work is noticed. Thank you, Drew. I'm so glad you're on our team." Olivia shook his hand and stood up. "I'm off to the training now."

"Thanks," Drew said. "I know you're busy. I really, really appreciate this. It's not what I expected. Thank you."

The next time you acknowledge someone for a job well done, try using this formula:

- Intent
- Facts
- Impact

An earnest, face-to-face thank-you means so much more than a written note, and the recipient will know exactly how to replicate the good job they've done. The chances are high that they will.

By now you can see that engaging the project is all about engaging people. You can have sophisticated project management programs. You can plan like a pro and run a process like a star. But people are the project—people with jobs, families, feelings, and personalities.

More than likely they also have bosses of their own—and if you're an unofficial project manager, you're not one of them. But that doesn't matter if you can engage the best efforts of people in the project.

And they will choose to bring their best for a leader who inspires and encourages them and holds them accountable.

A wise project manager puts it this way: Engaging successfully "depends on what people—those imperfect, opinionated, stubborn biological entities—decide to do, day in and day out." You might not be their boss, but by

following the principles in this book, your informal authority will grow among the people on your team.

APPLICATION CHALLENGE: PLAN A PERFORMANCE CONVERSATION

Use the following conversation planner to plan and role play a "missed commitment" conversation.

TOOL: PERFORMANCE CONVERSATION PLANNER

With Whom	**When**
What Is My Intent?	

What Are the Facts of the Situation?	**What Is the Impact on the Project?**
Action Items	**By Whom**

TO SUM UP

In short, the third step in project management is engaging the team. Here you determine how you're going to work together. You set the ground rules—the Five Foundational Behaviors. You establish a cadence of accountability—a rhythm of regular and frequent Team Accountability Sessions—so that team members can make and account for commitments to move the project forward. You often meet with team members in Performance Conversations to celebrate their contributions or to help them revise their behavior—or both.

Engage the team using these tools:

- Team Accountability Session record for tracking team commitments and clearing the path
- Performance Conversation Planner for helping individual team members improve their contribution

CHECK YOUR LEARNING

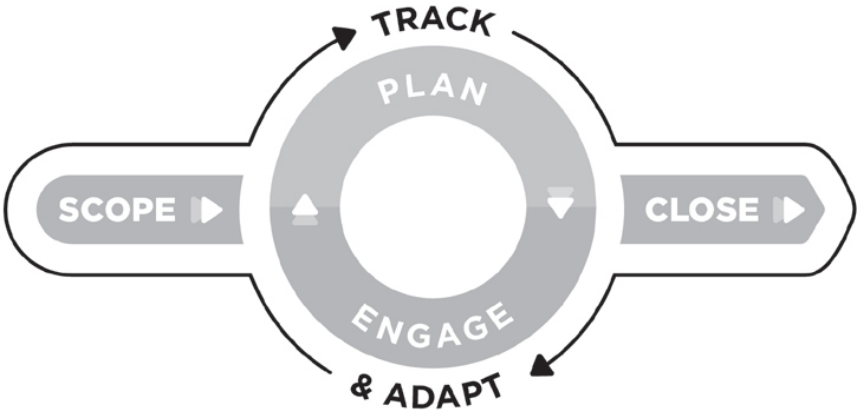
- ✓ How do you make a project engaging for the team?
- ✓ What is a Team Accountability Session? How is it different from the typical staff meeting?
- ✓ Why should you review the project schedule in the Team Accountability Session? Why should you treat it like a scoreboard in a game?
- ✓ Why should you ask team members to report on their commitments and make new commitments?
- ✓ What do you do if a team member misses a commitment?
- ✓ What does it mean to "clear the path" for a team member?

How can the Performance Conversation Planner help you build your relationship with team members while giving effective feedback?

CHAPTER 6

TRACK & ADAPT

The Goal: "Manage scope with agility to ensure value."



WHY DOES "TRACK & ADAPT" surround the process model? Because we're tracking and adapting all the way through the process.

- We've identified key stakeholders and scoped everything as a baseline, ensuring the project adds the value it's meant to add.
- We've planned and created a risk strategy so we can *adapt* if things change or go wrong. We have a project schedule including

feedback loops to *track* problems or opportunities that arise, as well as the critical path.

- We've created a cadence of accountability to *track* our progress and inspire the team to engage consistently.

Throughout the life of the project, we keep track of our plan. We adapt as needed to minimize problems, capitalize on opportunities, and protect the critical path. Our engagement process includes Team Accountability Sessions and Performance Conversations to help us adapt as needed. We've already set ourselves up for success. Everything's good. Still . . .

THE PRINCIPLE OF PROACTIVITY

Olivia couldn't afford to miss a step in her transition-to-hybrid project. Even though everything looked good, the project still felt shaky to her. Many of the associates were still deciding if they wanted to work at home, at the office—or at a different organization. Until most of them made a choice, she couldn't finish the project. So Olivia spent most of her time tracking progress and adapting flexibly to the situation.

Tracking and adapting means making sure the project goes as planned—on time and on budget—and delivers the value promised. In particular, it means tracking the risks you've identified. Are you taking care of risks as you intended? Or do you need to respond differently? Also, have new risks come up? Are you going to need new strategies, or will you even need to re-scope and re-plan the project?

The principle here is proactivity.

- To be proactive is to anticipate problems rather than reacting to them. That's why we do risk planning early in the project.
- But to be proactive is also to change things when they need to be changed rather than to resist change—especially when a change greatly enhances the project's value.

Simply put, things happen to reactive people. Proactive people *make* things happen.

Even if you're doing a great job tracking the plan you already made, you will have to be ready to handle changes. Projects often fail because of the world's tendency to change. Stakeholders may demand new features. They "amend" or "modify" or "adjust" their expectations or mess with deadlines, driving you crazy. Or the market shifts, or technology is suddenly transformed, or a new CEO comes in with new priorities.

As we've said, you can get buried by "scope creep"—the tendency of a project to grow into an uncontrollable monster. Project professionals say that frequent changes in the requirements (scope) and timelines of projects are the number-one challenge they face. And it's not just the fault of those asking for more or different "stuff." Scope creep might happen because the scope wasn't clear in the beginning. Or you may be saying yes to changes without thinking through their implications. The project becomes a free-for-all.

Effective project managers steadily track progress to stop their projects from drifting into chaos. If you maintain a robust cadence of accountability, you'll avoid the tendency of the project to get out of control.

But even if you track progress against the plan, even if you successfully manage your risk strategy—how do you deal with *change*?

Stephen R. Covey said, "Basing our happiness on our ability to control everything is futile."[31] There are limits on what you can control even with the best planning and tracking. The pace of change is so rapid now that we simply don't know what tomorrow or even the next few hours will bring.

Adapting to change means more than just grinning and bearing it. It means getting a feel for change. It may even mean *embracing* change.

Changes to the project may add value to the project. In any project the first attempt at a solution will raise lots of issues. Effective project managers expect change. As stakeholders review the project, issues will arise that couldn't have surfaced any other way. As issues are resolved in new iterations, the team adds more and more value all the time.

Imagine you are building a new electric bike for customers. Over a weekend, you sprint through the creation of a rough version of the bike and let them ride it on Monday. They will find all kinds of problems and opportunities for you to work on.

By Wednesday, you've accounted for all that feedback in your next iteration. Customers try it out again and raise new issues. Somebody has trouble with the balance. Another person wants a softer seat. Another says the gear shift is too stiff.

After your next sprint, you've made all those improvements. Between sprints, the customers raise fewer and fewer issues. Soon they run out of things to ask for and *just love* their new e-bikes.

To add value as you go is the essence of the Agile Method. One of the basic Agile principles reads, "Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage."[32] Obviously, the bike team couldn't plan down to the last detail what the product would look like next week or next month.

A fact of life for project leaders: What was important yesterday might not be as important today. You can lament that fact of life, or you can welcome it —or at least be courteous to it.

You may find yourself changing your objectives, your process, your environment—all based on evolving stakeholder requirements that can add value. So getting feedback and adapting to the feedback is your work at this phase of the project management process.

Ideally, then, you need as rich a feedback loop as you can manage with your stakeholders. You might have trouble assembling them very often for feedback, but you'll find that you'll get more value out of regular and frequent sessions. That's why it's best to build feedback loops into the project schedule from the beginning. That way stakeholders can plan on giving feedback.

Use this status report as a means not only for keeping stakeholders in the loop but also for getting feedback from them to ensure the project keeps moving forward.

COMMUNICATE PROJECT STATUS

Use this tool or one like it to report project status to key stakeholders:

TOOL: PROJECT STATUS REPORT

Project Name				Date
Overall Project Health ☐ On Target ☐ At Risk ☐ In Danger				
Deliverables	On Target	At Risk	In Danger	Notes
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	

Clear the Path	Action	Who	Date

Here is how to use this tool:

Overall project health: Make sure stakeholders know whether the project is on target to be delivered on time and on budget.

Crucially, indicate if the project is at risk or in danger of going off track entirely.

Deliverables: List the deliverables and indicate which are on target, at risk, or in danger of the big whammy. The checkboxes act like traffic lights, so you need to determine if each deliverable is green, yellow, or red. (Some organizations formally label project status as "green," "yellow," or "red.") Green means full speed ahead. Yellow means at risk. If the deliverable is in danger, you've hit a red light. Stop and carefully consider what to do next.

A red or yellow light is a signal to stakeholders that you need their help. It means you've got an issue with resources, timelines, or budget, and you want to provide options for them to clear the path for the team. Sometimes a stakeholder can get something done with the stroke of a pen that the project manager can't do.

Sometimes a red or yellow light indicates an opportunity rather than a problem—an opportunity for adding value. It means you're rethinking a deliverable in light of new information.

Make sure you state problems or opportunities like a news headline, giving a quick summary of what stakeholders need to do, if anything.

NOT THIS

Deliverables	**Notes**
Trial designs	Investment needed
Regulatory partnerships	Progressing

THIS

Deliverables	**Notes**
New "Fast Lane" drug trials are stalled.	To get these trials off the ground, we're going to need more aggressive investment.

Partnership with the medicine control agency promises to speed up our approval process.	Agents are giving us pointers on common pitfalls that the agency sees, and how to avoid them.

Notes: In this section, proactively provide suggestions for fixing problems. In a project status review meeting, record stakeholder feedback—especially ideas that will add value or improve the process.

Clear the path: Define what people commit to do about issues that may affect the project.

The Project Status Report is a "talk document." It's not just a formality but a chance to get the help you need to stay on track—so the status report is a real benefit to you as project manager. An expert said, "All customers want their jobs finished on time and on budget—or preferably faster and cheaper. But if they can't have that, and sometimes they can't, what they really want is to be kept informed along the way."[33]

Who should receive a status report? How often and in what form? Go back to your scoping document and identify which stakeholders require it and how you can best give it to them.

The previous tool can keep stakeholders abreast of what's happening. It's also a way for you to get any obstacles to your progress cleared away. It isn't a complicated document loaded with red tape. It should be an at-a-glance document so key stakeholders and others can easily and quickly see if they're winning or losing—and how they can help.

A FRUITFUL PROJECT REVIEW

Hedda didn't want her key stakeholders worrying about progress on the project, so she scheduled specific milestones where important decisions might have to be made.

One big milestone was a project status review to showcase the working model of a speeded-up process to get drugs to market. It had taken more than a year to get to this milestone, and now it was time to give the board of

directors a chance to raise issues about the model. In this review meeting, they would decide whether to go ahead with the proposed model or back up and start again.

Hedda reported that, despite delays that put the project at risk, most of the deliverables were now on track.

Then she managed the meeting the same way she managed the Team Accountability Sessions. The idea was to get as much input as possible as quickly as possible without a lot of debate. Everyone had a chance to give feedback on the model solution, and she would say, "Thank you. Next?"

The meeting was far more fruitful than she expected. One stakeholder, a representative of a specialty drug company, suggested something new: "We've been partnering with you in developing drugs for people with rare conditions. What if we partnered with you not only in development but also in writing the application so it exactly fits what we need?"

Dr. Brack added, "The chances of speeding up approvals would go way up if we did that." The partnership became an action item.

Then a stakeholder who represented the regulatory agency made a surprising suggestion. "You're trying to get through our process faster, but at the same time we know *our* process is too sluggish. Why don't we work together on ways of expediting *both* our processes?" There was a group intake of breath.

"Why didn't we think of that before?" Eilert exclaimed, and even Joren smiled big. The agency's proposal became an action item that could substantially clear the path to approval.

WHY HOLD PROJECT STATUS REVIEWS?

In the project status review, you should check whether the project is on track to deliver the business value promised at the scoping stage. Are you still in compliance with the financial plan? Do financial projections still make sense? What are the financial implications of any proposed changes?

Project status reviews help you to identify where things might be going off track in time to make adjustments. Put simply, in your review, watch for problems and ask the group how to correct them.

Project Status Reports are essential to the cadence of accountability. Even if things are going smoothly, just letting stakeholders know how things are tracking can keep them calm and connected to the project—and your level of informal authority will continue to rise. Update them regularly even if you have no updates. You'll be seen as a competent project leader, accountable and transparent in both the good and not-so-good times.

So check in with your stakeholders often. They need to know if you're making progress, or, if not, what you're doing about it and how they can help.

Key stakeholders are not just police looking for infractions. They are also rich sources of suggestions for improvement and opportunities for adding value to the project. Don't miss the chance to mine their expertise and diversity of opinion to change the project for the better.

APPLICATION CHALLENGE: PREPARE A PROJECT STATUS REPORT

Use the following tool to assess the status of your project. Get feedback from your stakeholders and watch for opportunities to add value.

TOOL: PROJECT STATUS REPORT

Project Name				Date
Overall Project Health ☐ On Target ☐ At Risk ☐ In Danger				
Deliverables	On Target	At Risk	In Danger	Notes
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	
	☐	☐	☐	

Clear the Path	Action	Who	Date

ADAPT TO CHANGE

One of our consultants started to fix a leaky shower in his bathroom, but being “an idiot at plumbing” (his words), he broke the whole thing. Fixing

the broken shower required new tile work. “While we’re at it,” said the tile guy, “why not retile the whole bathroom?”

“Okay,” our friend said. “Why not?”

But while retiling the bathroom, the tile guy broke through the kitchen wall.

Let’s make this story short. Six months and “heavy expenses” later, our friend had a new bathroom *and* a new kitchen, which he likes very much. But these renovations weren’t in the family financial plan, and the payments will go on and on—and on.

What began as a simple project to fix a leaking pipe turned into a black hole that ate our friend’s bank account. Every project can get out of control like this and consume you. What you thought would take six months turns into three years. What you thought would cost *x* turns into *x* times *x* times *x*!

BLACK HOLES

As mentioned earlier, you could be driven around and around in ever-widening circles by scope creep, as the original project grows gradually out of control. Agile practitioners call this sort of thing “a black hole.”

A black hole happens when one or more deliverables take up more time and energy than expected, throwing the entire project off schedule. Like black holes in outer space, a black hole in a project sucks up everyone’s energies, stealing time from other deliverables.

What causes black holes?

Maybe you didn’t scope the project properly. Maybe you didn’t account for the complexity of a deliverable. Maybe things just *changed*—stakeholder priorities, the market, technology, available budget, and so on.

Your reputation as a project manager depends on delivering value on time and on budget. So you’ll want to avoid letting people add a new feature to the project whenever they feel like it.

Of course, you can’t and shouldn’t avoid all change. Anything can change overnight, and you can’t be the cop who arrests everyone who is trying to change anything. We live in a synergistic world, where people do change their minds and even come up with better ideas that lead to better outcomes.

Then again, sometimes those "better outcomes" are only marginal. So where do you draw the line?

How do you adapt to change and avoid getting sucked into black holes?

Make only high-value changes to the scope. Obviously, you're going to consider changes if they will dramatically increase the value of your project. "Good ideas" or even exciting ideas don't necessarily make that cut. As project leader, help the team distinguish high-value changes from merely good ideas. Generally speaking, a high-value change will:

- Increase ROI and/or NPV significantly.
- Respond to major changes in the marketplace.
- Speed up results substantially.

Changes like these, if accepted by stakeholders, will of course change your project trajectory.

Examine team behavior. Are there too many changes? Is the team truly focused on the critical path, or are they constantly distracted or interrupted? Are they under pressure from a whirlwind of competing priorities? Are they mistaking "good" or "slack" activities for "critical" activities?

Push back respectfully. Sometimes powerful stakeholders may demand changes that are questionable. If so, live strictly by the Five Behaviors. Use the Performance Conversation Planner to stay neutral and gather the facts.

- What is the intent of the change?
- What is the impact?
- What would be required to make the change happen (resources, budget, time)?

You can't make a rational argument for or against any change until you know the answers to these questions.

"HOLD THE PHONE!"

The one thing that will dissuade a powerful scope creeper is money.

For example, demand at ScamCatch was exploding. The surge in online fraud was overwhelming police departments, so energetic young entrepreneur Fen saw an opportunity to fill the gap—to catch scammers within minutes of their crimes.

That's how ScamCatch was born. Scammers preying on Fen's customers could be hiding anywhere from Central Asia to Tierra del Fuego. Contacting his agents in remote parts of the world was slow and sometimes impossible. So he set up a project team to find faster ways to do that. The project team had settled on establishing a private network using standard satellite phones.

Then one day Fen heard that a new type of smartphone was in the works—a smartphone embedded with satellite technology that could reach anyone anywhere.

"I want to be able to use *one* phone for everything," Fen told the project team. "I don't want *two* phones."

Lee, the team leader, researched the cost and complexity of adopting satellite smartphones. Soon she knew the big whammy was about to fall on her. The so-called satellite smartphone was in development but years away from being available on the market, and to use experimental phones cost a towering fortune.

Lee asked for a meeting with Fen. "Please help me with this project change." Together they went through a change-request tool to define the change and figure out the impact it would have on project scope, budgets, and deadlines.

Facts in hand, Lee scheduled a briefing with the key stakeholders in the project, including ScamCatch's chief financial officer. "Thanks for meeting with us today," Lee said. "We are considering a change request to replace the private satellite network with a new kind of smartphone. Before we do, we thought you might appreciate knowing the impact of the change."

Everyone sat in stunned silence as Lee reviewed the change-request form. She described a thicket of domestic and international regulations they would have to follow. And the CFO seemed close to fainting when he heard that the change would cost more than ten times what was budgeted. “We can’t possibly justify that expense. And the product isn’t even available yet!”

After weighing all the data, Fen agreed to postpone the shift to the new smartphone technology.

With the right information and tools, the project manager was able to have a professional and coherent conversation with the stakeholders instead of plunging into a black hole. She was no doormat—she got the right result.

THE PROJECT CHANGE PROCESS

So how can you tell if a change makes sense or not? How do know if that high-tech phone network is that important? You need a project change process so when people come to you and say, “Hey, can you make it do this?” you’ll have a system to decide if you should.

Use this Project Change Request tool to guide your decisions about changes to the project.

TOOL: PROJECT CHANGE REQUEST

Project Name

Request By

Proposed Change

Reasons for the Change

How This Change Will Add Value

How This Change Will Affect the Constraints
Time
Quality
Budget

Key Stakeholder	**Approval**	**Date**

First, circle back to your Project Scope Statement to make sure you clarify the original expectations with the proponent of the change.

Proposed change. Define as specifically as possible what the proponent wants to change in the project scope. Don't settle for vague language. A detailed description of the change helps stakeholders judge the value and the impact of the change on the project plan.

NOT THIS

Proposed Change
Use smartphones embedded with satellite technology instead of a private satellite network.

THIS

Proposed Change
Develop a capability to use smartphones to connect seamlessly between cellphone towers and satellite coverage in remote parts of the world. It will require these steps: • Research benefits and disadvantages of switching to a smartphone environment. • Apply to the International Telecommunication Union for a network license. • Contract with satellite companies to provide low-frequency data transmission. • Consult with countries that do not permit interference with existing data networks or that censor telecommunications. • Contract with smartphone providers to use experimental equipment.

Reasons for the change. Use the proponent's actual language if possible, so your own biases—for or against the change—don't come through.

NOT THIS

Reasons for the Change
The CEO wants to change to smartphone technology because it's more convenient than heavy satellite phones.

THIS

Reasons for the Change

The CEO says, “I want to be able to use *one* phone for everything. I don’t want *two* phones. Satellite phones are big and require heavy batteries. Smartphones are more convenient for our agents.”

How this change will add value. Again, use the proponent’s words.

NOT THIS

How This Change Will Add Value

More connectivity, faster, easier to use.

THIS

How This Change Will Add Value

The proponent says, “Smartphones are easier to use, more convenient, and more familiar to our agents than satellite phones. Plus, with satellite technology embedded, they can connect virtually anywhere on the globe—same as with ordinary satellite phones.”

How this change will affect the constraints. Record your best estimates of the amount of time it will take to make the change and the effect on the project schedule. How will the change affect the standard of quality key stakeholders expect for the deliverables of this project? How will the change affect the project budget?

How This Change Will Affect the Constraints

Time
We estimate that we will need to push back the project deadline by at least six months and possibly a year to carry out licensing and contracting work, as well as to prove the concept. Plus, the product is still in experimental stages.

Quality
We will get the same level of global connectivity with smartphones as with dedicated satellite phones—with greater convenience to the user.

Budget
We estimate the additional licensing, contracting, and proving of the new system will require a 1,000 percent increase in budget. Plus, providers will require at least 10× standard charges per telephone call.

This factual presentation of the change request enables stakeholders to weigh the value of the change to the project. They can judge better if the change adds significant value or threatens to push the project into a black hole.

If the stakeholders approve the change, they should sign the Project Change Request form. If they don't approve, you can document the reason for the denial and keep it in your files, should the subject come up again.

TO STAY OR NOT TO STAY

It took a minute for Olivia to take in the conclusion of Drew's latest survey report.

It took another minute for her to text every key stakeholder and ask for a meeting—ASAP.

"Our survey surprised us," she announced. "It appears that 90 percent of our associates plan to work remotely. We were thinking it would be about 30 or 40 percent, so a major deliverable of our project was the repurposing of the office building.

"Now it looks like the building will be virtually empty. Only the C-suite and the finance and human resources departments have indicated they want to stay in the building, which adds up to only about thirty people. If that's so, we have a serious decision to make.

"Does it make sense to maintain the current building? Do we drop the repurposing plan from the project? Should we plan to relocate those thirty people to a different venue entirely? In other words, do we stay here or not?"

The CEO, a blustery individual, said, "I question this whole project. How can we do business with 90 percent of our employees off-site doing who knows what? I've had my doubts from the beginning about this hybrid thing. Sure, they're going to want to stay home. Who wouldn't?"

This was the CEO talking. Olivia tried not to panic. She had thought all along that Maria, the HR manager, should have led the project, not her. Now she gave Maria a fleeting look: *Help!* But Maria simply returned her look.

"Um, thank you," Olivia responded. "What do others have to say?" Thankfully, she had her project management discipline to fall back on. It was not time yet to decide anything.

The room was quiet for a full minute. Then Drew, who had become her right hand on the team, spoke up. His thin beard trembled; she knew how nervous he was.

"Our survey was not offhand in any way. Our team sat down with every one of nearly three hundred people and went into depth with them. We evaluated their roles, their workstations, their schedules, and their environment. We sketched out a work plan for each person, including how to collaborate. I believe in the integrity of our people, and I believe them when they say they could work remotely more effectively and efficiently."

"Of course they would say that," the CEO interrupted, but Olivia spoke up firmly. "Thank you, Drew. Next?"

One of Drew's surveyors opened her laptop and read off some employee comments about hybrid work and how much better it would be for them and the organization. The main issue for them was commute time—many of them struggled each day just to get from their homes to the downtown offices. Traffic, public transport schedules, family conflicts—it added up to hours out of their daily lives.

Olivia had brought in a consultant from Malfolio to advise on the project, and she invited him to share his findings. He was trimly dressed in a suit, a yellow tie, and socks. "Ironically, your most unengaged employees are the ones who want to come into the office," he said.

"That doesn't make sense." The CEO glared at the consultant, who sniffed back at him.

"It's true that remote work tends to distance employees from 'the organization,'" the consultant replied. "Loyalty declines somewhat. But then you're dealing with a young workforce unlike the last generation, who were 'company people.' Today's workers want to make a contribution, but they don't necessarily identify with an organization."

Jack, the chief financial officer, went next. "I'll tell you what doesn't make sense—paying rent on this building if it's 90 percent unoccupied, or

even 50 percent. We need to get out of the lease and find smaller quarters." He was brief and pointed, as usual.

The CEO warmed to Jack's comment. "We'd save a bundle, wouldn't we?"

Sebastian, the head of European sales, was on videoconference. "But what happens to collaboration? I know we've discussed it before, but people need to be face-to-face sometimes."

"We seem to be able to collaborate with *you* just fine, Seb," Maria broke in, and everyone laughed. "Seriously, though, he's right. We will continue to need good, creative, face-to-face collaboration. I suggest that we change the repurposing component of our plan and start looking for a convenient location with less office space and more collaboration space."

Even the CEO assented to this. Gratefully, Olivia put a Project Change Request form on the electronic whiteboard, and the group filled it in together.

SCOPE CREEP VERSUS SCOPE DISCOVERY

The Project Change Request form requires deep thinking, but don't worry. You don't need to fill it out for every change, but it does give you a thinking process to follow when somebody suggests one. A small change here and there is one thing—you shrug it off or take it on—but the principle of accountability means that you think through big changes using this process.

And be careful about even small changes, because you can get nibbled to death if they start to mount. "You need to settle on a specification and be ruthless about delivering things from the core list before allowing others to be added in," says one expert. "Usually, developers are good people who will bend over backward [to accommodate new requests]. If you multiply this out, it can lead to significant non-delivery down the track."[34]

In Olivia's case, the project required a major scope change. Most project leaders would stumble at this—they live in fear of scope creep as it is—but this was scope gallop. Nevertheless, sometimes the whole scope of the project has to change because of new information.

There's a big difference between scope creep and scope discovery. As a project unfolds, you might learn things that make the original scope statement

inadequate for the real need. The smart project manager pledges allegiance not to the scope statement but to the outcome the project is intended to produce.

Always, the real goal is to create value, not to stay married to a project plan.

How can you tell if you're standing on the edge of a black hole or a truly worthwhile discovery? Here are some guidelines:

If the Suggested Change . . .	Then You Have
• Adds cost and time without adding significant value to the customer. • Makes the project more confusing or less focused. • Provides value that can be produced some other way. • Is motivated by politics rather than a real need.	Scope creep
• Creates significant new value. • Leads to a substantially better way to meet the immediate needs of the stakeholders. • Clarifies the project's purposes. • Focuses the project more narrowly on a manageable solution.	Scope discovery

These guidelines help, but you have to rely on your common sense. If you're constantly adding baggage to the project, you might be sinking under scope creep—especially if the baggage isn't clearly necessary.

So how do you say no to a change request, particularly if the person who wants the change is (let's be honest) more influential than you are?

Take the change through the filter of the Project Change Request tool. It's your "talk document" for your conversation with the proponent. Remember the Five Foundational Behaviors:

- **Listen first.** Make sure you record clearly what the change is and why the proponent wants to make it. Remember to use your key stakeholder questions to clarify.

- **Clarify expectations.** Use the tool to identify any added value and impacts on time, quality, and budget.
- **Extend trust.** Assume that the proponent is coming to you in good faith and means well.
- **Practice accountability.** Remember that you are responsible for carrying out the project as agreed, so you have to justify adding to the scope. Make sure stakeholders are absolutely clear on what it will mean to change the scope, and make sure they explicitly approve or deny the request.
- **Demonstrate respect.** It doesn't do any good to fly into a rage or bad-mouth people who propose changes to you. Besides, *you* are a respectful person.

Living by these principles makes it easier to say no when you should.

I WANT MY CANDY *NOW*!

The top salesman of a candy company was constantly overpromising. He took a huge order for a product that required a special gluten-free formula, and the customer wanted it within thirty days. Even though the project team worked day and night to get the formula just right, the ship date was in jeopardy.

Then came the big whammy—the salesperson rushed in and breathlessly announced that the customers now wanted the stuff in two weeks.

The project manager suspected that the salesperson was just trying to meet an earlier revenue goal, but she practiced the Five Behaviors. She listened respectfully. Then together they worked through a Project Change Request form (while he complained she was wasting his time) to clarify the expectation. She asked for a little time to see if she could work this out. She did not want the salesperson to think of her as "reactive" (because she certainly felt that way), and he was itching to get back with his clients.

The project manager shut the door. This was a delicate situation. She didn't want to upset the company's best revenue producer, but the whole deal

was now at serious risk because there was too little time, not enough budget, and most important, the company might be sacrificing quality in a big way. With a couple of team members, she brainstormed solutions, but, as she suspected, she couldn't guarantee to ship a quality product in such a short time. Her integrity was at stake.

Her next thought was to ask the boss to handle it, but she had a good relationship with the salesperson and decided to talk to him directly first.

Carefully, she explained her dilemma. She appreciated his desire to meet his customer's needs, but she was accountable for the quality of the new product. The risk to the firm was enormous.

The salesperson was a little taken aback at her candor and appreciated the respect she showed him. He agreed to go back to the customer and try to find some wiggle room on delivery dates.

It turned out that the customer only thought "it would be nice" to get the shipment earlier, but they would be perfectly happy if it arrived on the original date.

The Five Behaviors saved this project manager, but even if you live by them, you might not be able to control changes. There are times to worry, like when the direction of the project changes radically but the deadline doesn't, or vice versa. Still, you get the best results possible by using the Project Change Request tool and practicing the Five Behaviors.

When we have no control over problems, said Stephen R. Covey, "our responsibility is to smile, to genuinely and peacefully accept these problems, and learn to live with them, even if we don't like them. In this way, we do not empower problems to control us."[35]

APPLICATION CHALLENGE

Use the following tool to analyze a proposed change to your project. Get feedback from your stakeholders and watch for opportunities to add value.

TOOL: PROJECT CHANGE REQUEST

Project Name

Request By

Proposed Change

Reasons for the Change

How This Change Will Add Value

How This Change Will Affect the Constraints

Time

Quality

Budget

Key Stakeholder	Approval	Date

TO SUM UP

In short, the fourth "step" in project management isn't really a step. Using your project plan, you track progress throughout the life of the project. If the situation changes or stakeholders request changes to the project, you adapt as needed.

It's like driving down a road on a journey. You make corrections as you go and eliminate or avoid obstacles. You know where you're going, but sometimes you run into a detour. You have side roads to choose from, but it's best to keep on the main road—the critical path. If you change your destination, it will be for an awfully good reason.

Your tools for tracking the project and adapting to change are the Project Status Report and the Project Change Request.

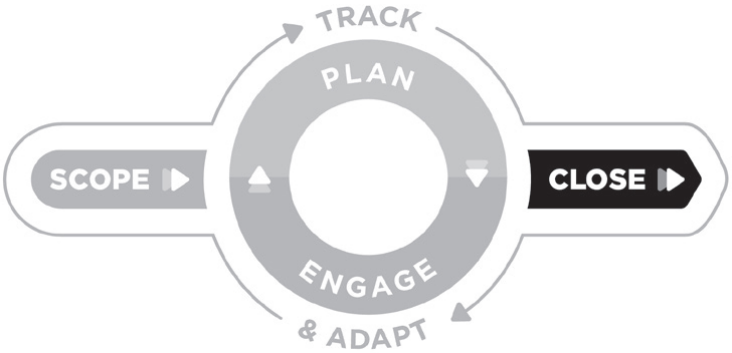
CHECK YOUR LEARNING

- What are the uses of the Project Status Report?
- How do the Five Foundational Behaviors help you cope with unexpected changes?
- What's the difference between scope creep and scope discovery?
- What are the criteria for accepting a substantial change to the project scope?

CHAPTER 7

CLOSE

The Goal: "Celebrate and prepare for future success."



HAVE YOU EVER WORKED ON a project that never ends? Then it's not a project. A project has a beginning and end.

But how do you know when the project is over?

It may seem the answer is obvious ("When it's done"), but you won't really know if the project is over until you do these three things:

- Confirm project close.
- Document lessons learned.
- Celebrate!

Projects are temporary things.

Different organizations have different ways of closing a project. Sometimes it involves heavy archiving of team records. Other organizations are less formal.

Regardless of your process, review each item on this checklist to ensure that your project is thoroughly "done." You might want to hold a stakeholder meeting to review the checklist or just go through it yourself.

TOOL: PROJECT CLOSE CHECKLIST

Confirm Project Close
☐ Confirm fulfillment of project scope.
☐ Confirm fulfillment of approved change requests.
☐ Obtain necessary sign-offs.
☐ Submit final status report, including measurable value added, to key stakeholders.
Document Lessons Learned
☐ Seek feedback from key stakeholders/team members.
☐ Record lessons learned.
☐ Archive project documents.
☐ Publish success.
Celebrate!
☐ Distribute rewards and recognition.

CONFIRM PROJECT CLOSE

To "confirm fulfillment of project scope" means to walk through the scope statement to make sure everything is finished. Do the same thing with the approved change requests to make sure changes have been done to specification.

It's an inspection. Construction people call it a "punch list"; they walk through the building at the end of the project and list the little things that might still need attention: a light bulb is missing, a screw is loose, a section of wall is still unpainted, and so forth. Usually, the building contract isn't fulfilled until every item on the list is "punched" (the builders used to punch a little hole in the margin of the list next to a finished task).

The same is true of your project. The principle of accountability means no loose ends. Failure to close out the punch list can mean people don't get paid—including you. It could mean unnecessary re-work and (worst case) lawsuits.

If the key stakeholders don't see the need to walk through the closing process with you, ask them, "Do you want it done, or *done* done?" In any case, it's a good idea to have them physically sign off on the final Project Status Report.

SUCCESS OR FAILURE?

You'd think it would be easy to say if a project has succeeded or failed, but it's not. Failure, like success, is sometimes a matter of definition and who's doing the defining. Some will love the finished project, some will be skeptical, and some may be unhappy after all.

In closing a project, you face the "speed up–slow down syndrome." Imagine you're driving a tour bus through a great city—some of the tourists will want you to speed up, others want you to slow down, but most of them (the great bulging middle of the normal curve) are just happy to be there.

And if you feel like you may have messed up in some respect, you're in good company. The U.S. Navy once launched a grand project to build an invisible airplane. They spent billions on the project before the budget officer calculated that finishing it would consume the entire budget of the navy for years to come. They canceled the whole thing.[36]

The Shanghai Tower, the world's second-tallest building and one of the most innovative, is universally applauded as an engineering marvel. Yet occupancy rates seriously lagged after its opening in part because of its innovative style—apparently, a lot of space can't be used due to the unique design of the windows.[37]

Was this project a failure? In engineering terms, it was a great success. In business terms, time will tell.

Originally budgeted at AU$7 million, the iconic Sydney Opera House ended up costing more than AU$100 million, or fourteen times the original estimate. According to Danish economic geographer Bent Flyvbjerg, it's "the most expensive cost blowout in the history of megaprojects around the world." Nevertheless, it has turned into one of Australia's most valuable assets, adding nearly AU$800 million to the national economy each year.[38]

Was the Sydney Opera House a failure or a success?

And as we've seen, the James Webb Telescope sends us awe-striking photos of deep space never before imagined—but it was twenty-two years late and overran the budget by 1,000 percent.

Was this project a failure or a success? It's all in how you define it.

One component of a project can fail and still produce good results. Project management methods don't completely prevent failure, but they help mitigate it.

Too often, project "success" is defined by two measures: time and budget. Of course, time and budget matter, but the main measure of success is the value delivered to stakeholders—*people*. Are they happy with the quality produced and the business results you set out to achieve? If so, you have succeeded in your most important job as a project manager.

What if you've done the best you can, but your project is still perceived as a "failure"?

Remember the Foundational Behaviors.

Demonstrate respect to provide a safe and welcoming environment for feedback. *Listen first*, without being defensive, to the people who think the project failed. Then *practice accountability*. Follow this good advice from a project manager: "Give some serious thought to what you could have done better, and deliver it to people in a way that shows that some good came of

the failure, and you're better for it. The 'stench of failure' is the inability to learn from mistakes."[39]

DOCUMENT LESSONS LEARNED

A key reason for formally closing out your project is to document what you've learned along the way. A good project management program will feature a way to do this.

To do this right, you need to conduct another interview—to get feedback from key stakeholders and your team members. It's a good idea to also invite anyone who has to live with the results, namely users of the product or service you've created.

We call this session a "project retrospective." It's a practice taken from the Agile Method. The team holds a retrospective meeting specifically to discuss improvements to the organization's project processes. The agenda for the retrospective is simple:

- What was done well?
- What needs to be done better or differently?
- What unexpected risks did we have to deal with?
- How does our project management process need to change to meet future goals?

Record the feedback for future reference.

The Foundational Behaviors come into play here as well. Look at the positives and the negatives. Ask the team to share their thoughts candidly but remind them to do so respectfully—no finger-pointing at others. As project leader, you are accountable for the outcome, so any fingers should be pointed at you.

Do a lot of listening without responding or getting defensive. Your goal is to collect feedback, not to defend yourself. The overall objective is to do projects better from now on, so it's in your best interest to be quiet and hear

people out. If they feel safe enough to raise ideas for improving the process, they'll more likely want to play in the next game.

Your lessons learned can help the next project produce value faster, cheaper, and better.

When we ask people if they can find the planning documents and the lessons learned from previous projects, the overwhelming answer is "No!"

Don't be like the man who found a bag of gold, dug a hole, hid it, and then forgot where it was. Your project documents are gold. Imagine the wealth of information buried in them for the next unofficial project manager —and it could be *you*. If you can't find the nuggets of gold you earned with such hard work, what a waste. Now you have to go back and learn those lessons all over again.

Publish your success. Let the world know what a great team you have and what they've accomplished. Encourage the higher-ups to acknowledge them with a note. Use the proper media channels to share the team's achievements —organization websites, blogs, podcasts, maybe even social media. Successful projects have great public relations value.

Even if you deem your project a "mixed success," your lessons learned constitute *value* to your organization and to yourself. It's called *intellectual capital*, and it's often just as important as financial capital to the future of your organization.

CELEBRATE PROJECT CLOSE

How do you show your appreciation to people who have given so much to the project?

You'll have your own way of celebrating, but remember a few things.

People like to be recognized. A personal note goes a long way.

A little celebration is a good idea. Bring in key stakeholders and invite them to say a few words about the team. Have some snacks. Be ready to say something nice about each team member. Highlight the lessons you learned.

And above all, make sure everyone understands the value they've created —in measurable, concrete terms—so they will know that they've made a meaningful contribution.

CUTTING THE RIBBON

Olivia was nervous but happy the day they opened the doors on a new company headquarters. With a little creative thinking from the team and the help of the consultant with the yellow socks, she had managed to move the headquarters group into a new suite of offices with plenty of open workstations and high-tech meeting zones for teams. Under the new hybrid system, work teams would still be in the office almost continually, using these first-class facilities.

The finance department had shifted funds from the repurposing project and even found enough money to give bonuses to employees for upgrading their remote workstations. The cost of the new lease was far below the cost of maintaining the old office building. Operational costs were dropping through the floor.

So far, employees were happy with the new hybrid system. They were spending much less time and money on commutes and fancy coffees, so they were pleased with the boost to their bank accounts and time with their families. Sales were already up, and product teams were getting more done.

Now, with the stakeholders in attendance at a ribbon-cutting party, Olivia gave everyone a concise report of the value added by the project. "Our turnover rate in the last quarter has dropped by half. More than two hundred associates are now working remotely, which has already resulted in savings of nearly 50 percent in operational costs. Added to this, employee time on task has gone up by at least 10 percent and is likely to rise further. We attribute that mostly to less commute time.

"Finally, we anticipate the next fiscal year to be radically better than last year due to massive cuts in operational budgets and increased productivity."

Olivia felt pride bubble up as the stakeholders applauded her. She invited the project team to stand and be recognized.

Now it was time to cut the large red ribbon on the door of the new office suite. "You did it," Maria said, giving her a congratulatory pat on the shoulder.

A MIDSUMMER CELEBRATION

It was midsummer eve in Oslo. With the sun still blazing at near midnight, the Lettal company party went on and on with good food, music, and dancing around a bonfire. Hedda and her team had a unique reason to celebrate, and they did. The highlights were recorded to be shared online with Lettal's remote workers.

Then Tesman, the CEO of Lettal, called for quiet to say a few words to everyone.

"I know you were skeptical when we set a goal of cutting our approval times by 67 percent. I too had my doubts. But there are a lot of people in the world who depend on us to get treatments to them—lifesaving, pain-relieving treatments—and I consider it a vastly important responsibility. The more quickly we can do that job, the better.

"We have pressed hard on you for the last two years. We have battered our brains to imagine new ways of doing drug trials, new testing protocols, a new writing process.

"A few changes are in place that I couldn't imagine before. Some of them seem a little crazy. We are partnering with the regulators—some would say 'the enemy'—and they are showing us how to move things along faster. We are fast-tracking certain drugs. And we now start writing reports before we have data!" There was a loud laugh. "Of course, we fill in the data later.

"These and many other changes have paid off. I am happy to report to you tonight that our compound 7XL—a new cancer treatment—has been approved by the control agency in a record five months!" Everybody cheered.

"This will mean hope and relief for thousands of cancer patients around the world."

"It will also mean millions for Lettal Pharmaceuticals," Eilert whispered to Joren, who grinned.

Tesman continued, "And I want to pay tribute tonight to the people who have been overseeing this project: Hedda Rising and her project team. Please raise your glasses to them!" Tesman pulled Hedda to her side and asked her to bring up her team to be recognized.

Hedda spoke up. "It's almost midnight, so I'll be brief. Our team has done the impossible in record time. We were failing for nearly a year, until I learned the importance of accountability—regular, frequent, disciplined accountability. And the team responded beautifully. Thankfully, I learned how

to hold myself accountable as well. Doctors, scientists, writers, legal, finance, marketing—even test subjects—gave their best and finest effort, being accountable to each other for their achievements and solving problems together. You know who you are."

Berta, Tesman, Thea, Rina, and even Dr. Brack were beaming. And Joren and Eilert were giving each other high fives.

"We have a long way to go," Hedda concluded. "In fact, the search for faster and better solutions never ends. Although this project is over, next week we start again!"

TO SUM UP

In short, the last step in the project management process is to close the project. At the close, we evaluate the success of the project and compile "lessons learned" that we can apply to future projects. We also celebrate the many people who helped along the way, recognizing their contributions and showing our personal appreciation.

Use the Project Close Checklist to ensure that you have delivered the value you promised to deliver.

CHECK YOUR LEARNING

- ✓ Why go through a closing process?
- ✓ What is the agenda for a "close" meeting?
- ✓ How are you going to carry forward the lessons you learn on your project?
- ✓ How are you going to recognize the contributions of your team members?

CONCLUSION

YOUR INFORMAL AUTHORITY IS NEEDED NOW!

A FEW FINAL THOUGHTS FROM ONE of our authors:

At the end of an intense project management workshop, one participant asked for a moment of my time.

"I realized something over the past two days," he said. "I need to do more work."

"In which area?" I asked, expecting him to talk about some nuance of the project process. He was a well-educated engineer with a slew of degrees and certifications.

Instead, he confessed, "I need to work on the Foundational Behaviors. I realized my projects fail because I don't communicate well. I don't clarify expectations, and it never occurred to me that my biggest job is to trust and inspire my team.

"This is my biggest takeaway. I can see now how leading wrong makes everything else go wrong, too."

He was one smart man.

The biggest job you have is to grow your informal authority. If you get so caught up in the tactics of managing projects that you forget the Foundational Behaviors, you will not succeed no matter how the project turns out.

Another participant added, "I've been a project manager for my whole career, working on highly successful projects and some very unsuccessful ones. Here's what I've observed.

"Successful projects are transparent. Everyone knows what's working well and what isn't. Information is shared and there's no guessing. In unsuccessful projects, information is doled out on an as-needed basis. People work in silos, keep their heads down, and focus on their own thing. They're discouraged from asking questions."

Clearly, many project leaders still need to catch up with the demands of today. We need you to step up with your informal authority and get things moving!

What we conclude from our experience is that a team can succeed regardless of the process they use if the team members behave with emotional maturity. Character and integrity count as much as skill and knowledge.

Of course, the basic tools and skills in this book will help you be:

- Confident in your ability to manage the process.
- Well equipped to handle every step of the process.
- Less fearful of risk and failure.
- Better able to handle change.

But unless you show *principled* leadership, your teams will flounder.

So, as you practice the Foundational Behaviors, you'll always succeed as a person. As you become more expert in the skills and tools presented here, you'll start to notice that your projects—and your life—are moving more smoothly. You'll be dodging the big whammy and skipping past the black holes with poise and self-assurance.

And in this wild, rapidly changing world we live in, you'll find that unofficial project management might just be the place to be.

GLOSSARY

Many of the following definitions derive from PMI's *Guide to the Project Management Body of Knowledge*, seventh edition.

Acceptance criteria: A set of conditions that must be met before deliverables are accepted.

Activity: A distinct, scheduled portion of work, usually to contribute to completion of a project component.

Agile Method: A method of project management characterized by short phases of work (sprints) and frequent reassessments and adaptations to change.

Black hole: A point at which the project team's attention and energy are "sucked" into an uncontrollable aspect of the project.

Brainstorming: A quick, nonjudgmental, creative data-gathering technique you can use to identify risks, ideas, or solutions to issues. Best practice is to get a diverse group of experts, stakeholders, and team members to brainstorm together.

Budget: The approved estimate of the cost of the project or any Work Breakdown Structure deliverable, component, or activity.

Cadence of accountability: A rhythmic process for ensuring team accountability for commitments made. Sessions are regular *and* frequent.

Project Change Request: A tool for proposing a modification to the project.

Close: A process for finalizing project activities, compiling lessons learned, and recognizing team accomplishments.

Component: A key element or subset of a deliverable.

Constraints: The restrictions or limitations that affect the project, generally in the areas of time, scope, quality, and budget.

Critical path: The longest sequence of scheduled activities that must start and end as scheduled and determine the duration of the project. If any activity on the critical path is late, the entire project will be late. It is your strategic instrument for managing the project.

Daily Scrum: See **Team Accountability Session**.

DANCE: An acronym for *decisions, authority, need, connections,* and *energy*, a set of criteria for identifying key stakeholders on a project.

Deliverable: Any unique and verifiable product, result, or capability that is required to be produced to complete the project.

Dependency: A relationship where two activities are reliant on each other's start or finish.

Duration: The time on the calendar between the start and finish of a scheduled activity.

Estimate: A quantitative guess of the likely amount of costs or resources or duration.

Finish-to-Finish: A relationship in which one activity can't finish until a preceding activity has finished.

Finish-to-Start: A relationship in which an activity can't start until a preceding activity has finished.

Five Foundational Behaviors: Leadership behaviors of an effective project manager: listen first, clarify expectations, extend trust, practice accountability, and demonstrate respect.

FranklinCovey Project Management Process: A straightforward set of best practices and tools from many sources—including traditional and Agile methods—to help unofficial project managers succeed. Based on effective principles of personal leadership and professional behavior.

Frontloading: The practice of getting as much information as possible from as many stakeholders as possible as early as possible to ensure a highly successful outcome and minimal risk.

Gantt chart: A bar chart on which scheduled activities are listed vertically and dates are listed horizontally. The Gantt chart is a popular method for displaying the project schedule.

Informal authority: The ability to inspire team members to want to play on your team and win, even if they do not functionally report to you.

Iteration: A short period of time in which a unit of work is developed, deployed, and tested—followed by review.

Key stakeholder: Any person who determines the success or failure of the project.

Lessons learned: The knowledge gained and recorded during a project that can be used by future project teams to improve their processes.

Milestone: A significant decision point or event in a project.

Mind mapping: A graphic brainstorming tool used to generate ideas, deliverables, components, tasks, and risks.

PERT (Program Evaluation and Review Technique): A technique for estimating the duration of an activity. Duration = $(o + 4n + p) / 6$ where o is the most optimistic duration, p is the most pessimistic, and n stands for "normal," or the duration you think is most likely. The number 4 balances the common tendency to make unrealistically short estimates of duration. The number 6 refers to the number of standard deviations between o and p.

Plan: The process of identifying risks to the project and scheduling project activities.

Project: A temporary endeavor with a start and finish, undertaken to create a unique product, service, or outcome.

Project manager: The person assigned to lead the team responsible for achieving the project objectives.

Project Scope Statement: A tool for defining the project purpose, desired results, constraints, exclusions, and stakeholder approvals.

Project team: A set of individuals who support the project manager in achieving the project objectives.

Risk: An uncertain event or condition that, if it occurs, will have a positive or negative effect on project objectives.

Scope: The sum of the products, services, and results to be provided.

Scope creep: The tendency of a project to change and grow out of control.

Scrum: An Agile methodology designed to guide teams in the iterative and incremental delivery of a product.

Sequencing: The process of identifying and documenting relationships among the project activities.

Sprint: See **Iteration**.

Stakeholder: A person or an organization that is actively involved in the project or is positively or negatively affected by it.

Start-to-Start: A relationship where an activity can't start until a preceding activity has started.

TAME: An acronym for a thinking tool used to decide how to manage a risk—should the risk be *transferred*, *accepted*, *mitigated*, or *eliminated*?

Team Accountability Session: A brief and motivating meeting with four agenda items: review the project schedule to see if the team is on track, report on commitments, commit to new actions that will keep the project on track, and clear the path for team members who confront obstacles.

Track & Adapt: The process of reviewing the progress of the project and identifying any changes that need to be made to the plan.

Waterfall Method: A traditional method of project management best suited for initiatives that have well-defined scope and clear objectives. The Waterfall Method emphasizes nailing the scope, doing heavy upfront planning, executing the plans, and minimizing change requests. The method gets the name "Waterfall" because of the cascading effect of the step-by-step processes. For example, those processes might be identified as initiating, planning, executing, testing, and implementing the final product.

Work: The amount of effort in minutes, hours, or days needed to accomplish a task.

Work Breakdown Structure (WBS): A hierarchy of project deliverables and their associated components, adding up to the whole scope of work to be carried out to accomplish project objectives.

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INDEX

Index can be referenced as a list of searchable words or terms

C

D

E

F

G

H

I

J

K

P

Q

R

S

T

V

W

Y

About the Authors

Kory Kogon is FranklinCovey's Vice President of Content Development, focusing her thought leadership on key pragmatic strategices around leadership and productivity. She is one of the authors of *The 5 Choices: The Path to Extraordinary Productivity*, *Project Management for the Unofficial Project Manager*, and *Presentation Advantage*.

Kory brings more than twenty-five years of business expertise from frontline positions to being an executive team member. Prior to FranklinCovey, Kory spent six years as the Executive Vice President of Worldwide Operations for Alpha-Graphics, Inc, a global organization. She was responsible for the team and projects that helped franchisees start up their business, develop staff, and reach profitability. She led the implementation of ISO 9000 globally and managed the installation of the first company-wide global learning system.

Kory has been honored as one of the "Top 30 Business Women to Watch" in Utah. Kory has earned a Certificate in the Foundations of NeuroLeadership from the NeuroLeadership Institute.

Suzette Blakemore is the Vice President of Sales for FranklinCovey's Enterprise division, where she leads 160 salespeople and is accountable for double-digit annual growth and millions in sales revenue. Suzette is a subject matter expert for FranklinCovey's Communication Advantage series and is well known for her practical approach to achieving and sustaining high levels of superior performance through a focus on productive, effective work. Suzette is also a beloved speaker on the topics of leadership, women leaders, and project management.

Recently recognized by the Women We Admire Organization, Suzette often volunteers to work with small business owners looking to increase sales revenue or build field selling teams. She has served on multiple board and peer committees and enjoys networking wherever possible. Suzette has three adult children and three grandchildren. When she isn't spending time with them, she and her husband John love to travel and scuba dive.

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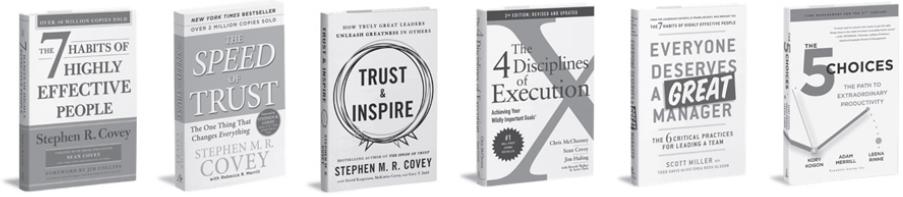

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