IFPPM.org

Before PM

Confirm you have a potential project

"As simple as possible, but no simpler." - Albert Einstein

Shapes are indexed to the book, and clickable links to the courses

S → **Need: Problem or Opportunity** S1.1.4 → **Feasibility Study / Needs Assessment / Opportunity Analysis** S1.1.4

The Importance of the Need

Always make sure your project is founded on a real "need", a genuine problem or opportunity.

A project without a real need will have difficulty getting resources and support, and might eventually sputter to a halt.

On the other hand, a project with a real need will get support even if it has problems.

And a project with a real need makes it easy to provide meaningful motivation for the team.

S1.1.4

1 - Initiating

Baseline the objective and initial business case

~ 1% of project effort

Sponsor S2.1.1 · **Customer** S2.1.1 · **Stakeholders** S2.5 · **Strategic Plan Alignment** S1.4

Project Objective S2.4.1, S2.3.2 ← **Assumptions** S2.4.3 · **Constraints** S2.4.3

Business Case (Options Analysis) S2.5 *Schedule & budget accuracy +/- 100%*

Conceptual Solution S2.4.4 → **Project Charter** S2.7 → **Sponsor Review** S2.7

Project Management Training ALL → **Project Manager** S1.7, PMLL 1, PMLL 9

Organizational Skills S1.7.2

Soft Skills
- **Comms**
- **Team Mgmt**
- **Negotiation**
- **Leadership**

S1.7.3 – S1.7.9

Contracted Projects

For contracted projects, the Customer may carry out Initiation and prepare the Requirements. The contractor then prepares the plan, perhaps submits it as a proposal, manages Execution, and reports to the Customer during Monitoring & Control. S3.1.2

Project Manager Essentials

- Project managers should have project management training, organizational skills, domain experience, and soft skills.
- The project manager should have the title "Project Manager", because only that title signals to everyone that they have the two "A" words: the Accountability and Authority to make the project succeed.
- Accountability is a great thing, because it gives you courage, and it gives you a lot of power: you will be the one people will ask if things go wrong.
- Therefore, only the accountable PM can say "If we want this project to be successful, then I need X…" and be listened to.
- Then always send a polite putting on record email for any critically important request.

S1.7

The Power of Accountability

- "If we want this project to be successful, then I need…"
- "If we want this project to finish within budget, then I need…"
- "If we want this project to finish on schedule, then I need…"
- "If we want this project to meet the client's expectations, then I need…"

…

- "… the team dedicated to the project for the next six weeks."
- "… a decision on this made by next Mon."
- "… the procurement in place by next Wed."
- "… the consultant on board by next Fri."
- etc…

PMLL 1

Do not start the next phase until the project has been approved by the Sponsor

2 - Planning

Determine the scope, schedule, budget, and risks within +/- 10% before you start

Deeply Practical Project Management

The core thread of practical PM processes applicable to any kind of project.

1% to 5% of project effort

Optional Review · Optional Review · Optional Review · Optional Review · Optional Review

Core Project Team (CPT) S1.1.3 → **Scenarios / Narrative / Requirements / User Stories** S2.2, S6.3.3, PMLL 6 → **Solution Definition** S3.2 → **Work Breakdown Structure (Deliverables)** S3.4.3, S3.4, PMLL 2

Precedence Diagram S3.5, PMLL 3 · **Procurement Planning** S3.10

Estimates S3.6 ← **Gantt Schedule (Critical Path)** S3.7 · **Cost Rollup** S3.9

Resource Levelling S3.8.1 → **Resource Planning** S3.8.2

Project Management Plan S3.13.1 *Schedule & budget accuracy +/- 10%* → **Sponsor Review** S1.1.3

Iterate & optimize planning as needed

Risk Identification S3.11.4, S3.11.5, PMLL 4 → **Risk Qualification** S3.11.5 → **Risk Quantification** S3.11.7 → **Risk Response Planning** S3.11.8 → **Risk Register Baseline** S3.11.15

Opportunity Identification S3.11.4 → **Opportunity Qualification** S3.11.6 → **Opportunity Quantification** S3.11.7 → **Opportunity Response Planning** S3.11.15 → **Opportunity Register Baseline** S3.11.15

Comms Planning S3.12

Quality Planning S8.4 ← **Business Case Update** S2.5

Planning Essentials

After agreeing the objective, the most important step in baselining the project scope is interviewing everyone and baselining a complete set of requirements to find all the detail behind the objective.

Then after the core team creates the WBS of deliverables, everything in project management gets easy. The entire project is broken down into smaller, more manageable pieces, clear work outputs allocated to a single team member, and are all the project manager really cares about after that.

The precedence diagram is your most important project management tool. Creating the precedence diagram with the core team is what ensures all the deliverables and dependencies are identified, the schedule and critical path will be accurate, and the project plan is realistic and as simple as it can be.

Knowing the schedule critical path is gold, because any slips on the critical path will delay the entire project, so the PM can focus most of their attention on managing the deliverables on the critical path. S3.12, S2.2, S3.4, S3.5, S3.7

Project Planning Fundamental

"A project plan with an insufficient risk reserve, both time and money, is already late and over budget… and it hasn't even started yet!"

S3.11, S3.13.2

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4 - Monitoring & Control

Manage as close to the plan as possible

The Weekly Heartbeat

A one hour issues status meeting of the team leads is only 2.5% of a 40 hour week.

If you can get it down to 20 minutes, it is less than 1% of the week.

The weekly meeting is the *heartbeat* of the project.

S5.7

Weekly Issues Status Meetings S5.2 · **Monthly Project Reviews** S5.10 PMLL 5, 10 · **Triple Constraint Rebalancing** S1.5, S5.10.5

Change Control S1.6.3 – S5.3

Project Management Fundamentals

"Just like changing the side of a triangle, changing any one of the three constraints of scope, time, or cost will cause a change in one or both of the others."

When the risk budget is being burned too fast, ask for guidance in the most constructively positive way: "What is **most** important to you, the scope, schedule, or budget?"

Your second most important priority is to succeed. Your first most important priority is to T3: "Tell The Truth".

S1.5, S5.10.3

3 - Executing

Create the product, service, or result

Full Project Team S4.2 · **Motivation Strategy** S4.2.9 → **Kickoff Meetings (Internal & External)** S4.4.1 → **Project Requirements Review (PRR)** S4.4.2 → **Designs / Drafts / Mockups / Prototypes** S4.5.1 → **Reviews** S1.6.3, S5.6.3 → **Builds / Increments / Iterations / Versions** S4.5.1 → **Reviews** S1.6.3, S5.6.3 → **Acceptance** • Scenario Verification • Three Party Verification S6.2.1, S6.3.3 → **Phasing** S6.3.1 → **Piloting** S6.3.2 → **Full Implement-ation** S6.3.4 → **Support, Training & Documentation** S6.3.5

Change Management Planning S6.3.1

Agile / Iterative / Incremental / Scrum / Spiral Development *

Top 3 Drivers Of Project Success

1. Scope Definition. First get your scope in ORDer, by baselining the Objective, Requirements, and work breakdown structure of Deliverables, so then the planned schedule and budget will be accurately sized.

2. Manage Scope Change. Implement rigorous change control, ensuring every requested change to the planned scope is written down, getting team wide input on the impact, estimating the additional schedule, budget, and risks, making a recommendation on whether it should be done now, later, or not at all, and then always obtaining Sponsor approval of the additional schedule and budget required before proceeding.

3. User Reviews. Ensure the development activities are "agile", with multiple builds / drafts / increments / iterations / sprints / versions, with user reviews in between, to catch any errors or omissions and obtain redirection as early as possible when it is least disruptive and costly. *

S1.6.3, S2.4.1, S3.2, S3.4, S5.3, S4.5.1, S5.6.3

Key Scope Management Technique

Whenever scope increases, for bad reasons or good, whether you just missed it during planning or a user review found something you had not realized, try very hard to find some existing scope you can trade out of the project to balance off the new scope instead of constantly increasing the overall budget and schedule.

This often does not look possible at first. But you should always try. Look at all the existing scope and see if you can find some that can at least be delayed, possibly to a future project or phase, to avoid constantly increasing the scope, schedule, and budget of your current project.

Because more new scope is probably going to come along soon, and this is going to happen again. Therefore, try very, very hard to avoid falling into the second most common cause of project failure: making the project better, and better, and better… until it blows up.

S6.3.3

*** See IFPPM reference: *"Project Development Methodologies: Waterfall, Incremental, Iterative, Spiral, Lean, Kanban, Agile, Scrum, and the rest"***

Do not start the next phase until the project has been approved by the Sponsor

5 - Closing

Wrap up in an organized fashion

Delivery & Handover S6.3.4, S8.3.5 → **Procurement Closure** S6.2 → **Lessons Learned Report** S6.3 → **Team Closure / Celebration** S8.5 → **Project Final Report** S6.6 → F

Lessons Learned Essentials

Lessons learned gathering is the highest ROI process in the PM life-cycle.

Ideally, lessons learned should be gathered as the project proceeds, after major reviews or events, facilitated with an online tool like a shared Wiki.

For live lessons learned gathering events, make sure you use a laptop and monitor or shared document so everyone can see the lessons learned as you type, to make the meeting half as long and twice as effective.

And make sure you brief the team, "No names or blame, this is about all of us getting better", and "Let's capture both things that did not go well that we want to avoid, and things that did go well that we want to repeat."

S6.4

Deeply Practical Project Management

This flowchart identifies the essential thread of PM best practices, refined over the past 100 years, that apply to any kind of project in any domain, and maximize value with the least effort.

For more information see the *Institute For Practical Project Management* at IFPPM.org, also providing the following completely free resources:

- The 250 page standard *Deeply Practical Project Management*.
- The companion book *Project Development Methodologies: Waterfall, Incremental, Iterative, Spiral, Lean, Kanban, Agile, Scrum, and the rest*.
- The book *How To Plan Your Project With MS Office*.
- The $44M example project *Magical Devices Version 3*, including a project charter, work breakdown structure, precedence diagram, Gantt schedule, cost curve, risk register, and project plan.
- A complete set of MS Office project management templates.

The IFPPM also provides online self-paced courses, and administers the certification *Deeply Practical Project Manager* (DPPM).

Always all free for non-profits, see IFPPM.org/non-profits

Indicates Sponsor / Customer involvement

Download this flowchart and one for smaller projects from IFPPM.org/learn
Print shops can print this version on A0 size paper

SX.Y = DPPM book section
PMLL X = PM Lessons Learned course (Many Atlantis are clickable)

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Repeat and overlap for a multi-phase effort