Outback
Team Building & Training

Project Management
"Getting It Done"
Workbook

Welcome to the Project Management – "Getting It Done" Workbook

With the "Getting It Done" Workbook, you will walk through the project management process, step by step. It'll take you through creating a successful project and business justification and getting others on board with your idea. Then, it'll help you develop a cohesive project plan and understand the practices for successful project execution. This workbook will be your step by step guide to set you up for success in your future projects.

After this workbook you'll have:

- The ability to write a clear project statement
- A method to evaluate all options when developing a business justification for your project
- The tools to develop a governance strategy through stakeholder analysis
- Practical tools and techniques to develop an effective backward project plan
- A practical review cycle in the implementation stage
- The ability to move projects on to a successful outcome

To get the most out of this workbook, you'll need:

- A project you have worked on, are working on or will be working on to apply project management principals to
- A list of the people involved or affected by your project

Overview

Section One: Why Project Management?

"Trying to manage a project without project management is like trying to play a football game without a game plan." ~ K. Tate

If you've ever seen a home renovation show on TV, you know two things: things don't often go to budget and things rarely go as planned. On a TV show, that makes for great drama and lots of nail-biting moments, but do you want that sort of drama in your professional life?

If you said, "No", then this workbook's for you.

Smooth running projects don't just happen – like most things in life that go well, it happens because a lot of thought went into it to begin with.

So, if you want to avoid the drama of a TV renovation show in your projects at work, strap yourself in for some simple but effective ways to manage your projects.

Ready? Then let's get going.

Section Two: The Project Statement

"No matter how good the team or how efficient the methodology, if we're not solving the right problem, the project fails." ~ Woody Williams

The beginning of a successful project is having a clear idea what your project is trying to do.

But not just *what*. You need to know *why* you're doing your project. What goal it's trying to accomplish and how you'll know when you get there.

A project statement is a more precise way of doing that. A project statement is something you put together at the pre-implementation stage. It's the first thing you do and it's done by answering a series of specific questions about your project. "What questions?" you ask? These questions:

a) Why is this project needed?
b) What does the project need to achieve?
c) What quality standards will be applied to the desired deliverables?
d) How will the project be governed?
e) What are the known risks?

For example, if your project is developing a higher profile for your business, your project statement might look like this:

> *In an attempt to gain more market share (a) we need to increase our business profile to attract more customers and establish ourselves as an authority in the field (b). We know this will have happened because we will become "sought after" rather than "found", as identified by customer feedback forms (c). Decisions for the ongoing success and troubleshooting of the project will be made by a representative of four company departments namely Customer Care, Accounting, IT and senior management (d). Risks include budget, problem tracking customer through-flow, difficulty in gathering real-time market share data, coordination across participating departments, and short trail period given to this project (e).*

Answer these questions and you end up with a clear outline of the trajectory of your project.

Try it yourself:

a) Why is this project needed?

b) What does the project need to achieve?

c) What quality standards will be applied to the desired deliverables?

d) How will the project be governed?

e) What are the known risks?

Write a complete project statement for your project:

Section Three: Developing a Business Justification

"A new idea is delicate. It can be killed by a sneer or a yawn; it can be stabbed to death by a joke or worried to death by a frown on the right person's brow." ~ Charles Brower

Brower makes a good point. Because it's so easy to kill off your project, you need to make sure you've thought the project through and come up with the best approach and the best business justification to get it acted on.

A business justification comes down to two very simple principles: does a project increase a business's revenue or does it make a business more effective?

Pretty much any project you can think of, from an away day for staff (better relationships make for a more effective business) to centralizing business operations (less overhead means greater revenue), boils down to one of those two factors.

Before you pitch your project take the time to develop a sound business case. That's not as hard as it sounds. It's a four step process, so let's begin at the beginning.

Step one: consider the options

Your project statement gave you a clear idea of *what* you want to achieve. Now it's time to think about the different ways you can make that happen.

For example, in the *developing a higher business profile* project used above, some options might be:

- Design a new website to increase presence
- Increase social media presence
- Implement a billboard campaign
- Use radio and TV advertising
- Sponsor sports events

The list could go on. And it should because generating as many ideas as you can, means you're looking at the project from many different angles. And that means when you offer your business case for the project, you've likely thought of all the approaches people will fire at you.

Try it yourself:

Write out as many DIFFERENT options you can think of for your project. Don't judge them or censor yourself, that'll be step two.

Step two: evaluate

Here's where you take all your ideas and decide the best one to take forward to make a business case for your project.

In a minute, rate each of your ideas using the following system:

1 = You want to do it and can do it
2 = You want to do it but can't do it
3 = You don't want to do it but can do it
4 = You don't want to do it and can't do it

If we go back to our example, the rating may look like this:

- Design a new website to increase presence – 2 (Not enough budget)
- Increase social media presence – 1
- Implement a billboard campaign – 1
- Use radio and TV advertising – 2 (Not enough budget)
- Sponsor sports events – 4

If you find yourself giving lots of ideas a 1 make sure the idea really is a 1 and not a 2.

Try it yourself:

Rate your project ideas in the previous section.

Step three: stakeholder analysis

Why is it useful to work out where your stakeholders stand? Well, for some of the reasons below:

- Knowing the level of interest in your project means you can get the most powerful stakeholders to help frame and support your business case, and input into your project early – all of which helps you get your project moving.
- Identifying and listening to those who don't support you means you can develop answers to their concerns early.
- Doing the above means you can increase support for your project as it progresses.

The following grid is one way to think about your stakeholders and what to do to appeal to them.

	Low Interest	**High Interest**
High Power	Listen for system or process objections	Keep informed; ask for help
Low Power	Listen for implementation objections	Look for ways to involve

Power (vertical axis: High / Low) — **Interest** (horizontal axis: Low / High)

The grid works like this:

- **High power, high interest:** These people are your champions. These are the ones to keep involved and informed and seek advice and direction from.
- **High power, low interest:** These people may not like your project and also have the ability to put an end to it. Validate their objections early and work to resolve them.
- **Low power, high interest:** These people like your project, but can't directly help to make it happen. Keep them informed and offer them ways to get involved. If approved, these people may be the ones who implement it.
- **Low power, low interest:** These people may not like your project, but can't quash it. Like the low power, high interest group these people may be the ones who implement your project. Listen to their objections especially in terms of implementation.

In our example, it may look like this:

Increase social media presence:

Power

	Interest Low	Interest High
High	Listen for system or process objections Bob S - Senior Manager Andrew - Senior Manager Jill - Admin	Keep informed; ask for help Claire - Head of Marketing Staci - GM Bill - Head of IT
Low	Listen for implementation objections Trevor - Front line staff Carla - Front line staff Jude - Front line staff	Look for ways to involve Margaret - IT Ellen - Front line staff Jake - Customer Care Manager

Interest: Low / High

Billboard campaign:

Power

	Interest Low	Interest High
High	Listen for system or process objections Bob S - Senior Manager Bill - Head of IT Ellen - Front line staff Carla - Front line staff	Keep informed; ask for help Claire - Head of Marketing Andrew - Senior Manager
Low	Listen for implementation objections Margaret - IT Jude - Front line staff Staci - GM	Look for ways to involve Trevor - Front line staff Jake - Customer Care Manager Jill - Admin

Interest: Low / High

Using these grids, you can now see where the power lies and how much interest they have in moving your project forward. Which of these two grids looks like the best project to run with?

To know the answer, we need one more step: the roles of each person. That might look like this:

Increase social media presence:

	Listen for system or process objections	Keep informed; ask for help
High	Bob S - Senior Manager Andrew - Senior Manager Jill - Admin	Claire - Head of Marketing Staci - GM Bill - Head of IT
Low	Listen for implementation objections Trevor - Front line staff Carla - Front line staff Jude - Front line staff	Look for ways to involve Margaret - IT Ellen - Front line staff Jake - Customer Care Manager
	Low	High

Power (vertical axis), **Interest** (horizontal axis)

Billboard campaign:

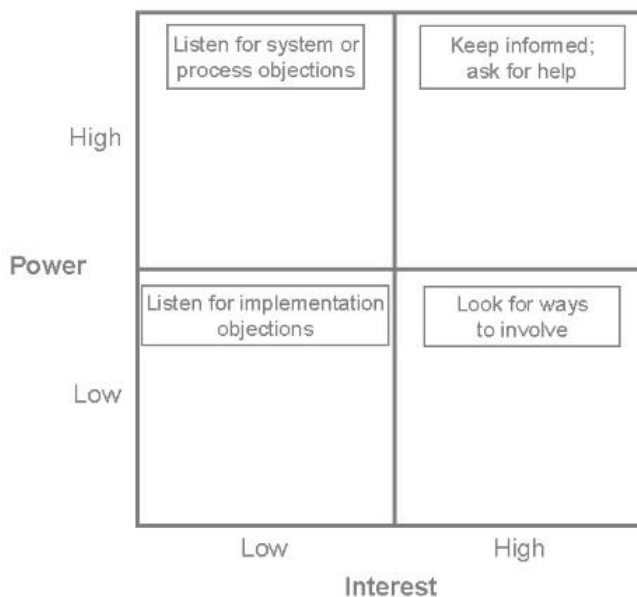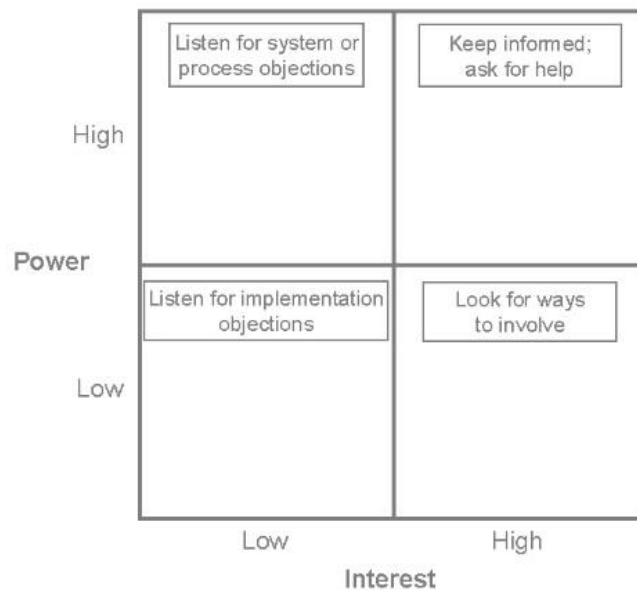|	Listen for system or process objections	Keep informed; ask for help
High	Bob S - Senior Manager Bill - Head of IT Ellen - Front line staff Carla - Front line staff	Claire - Head of Marketing Andrew - Senior Manager
Low	Listen for implementation objections Margaret - IT Jude - Front line staff Staci - GM	Look for ways to involve Trevor - Front line staff Jake - Customer Care Manager Jill - Admin
	Low	High

Power (vertical axis), **Interest** (horizontal axis)

In this simple example, with roles added the route forward becomes clear: a project geared toward increasing the company's social media presence.
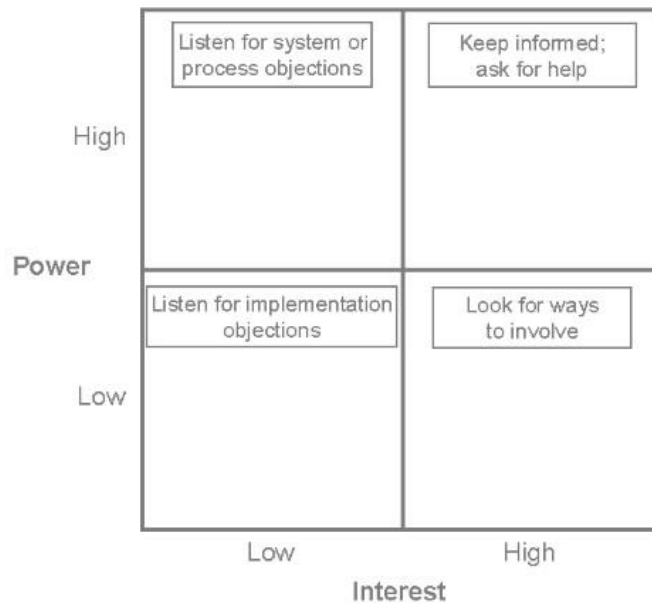
Try it yourself:

Using your list of stakeholders, apply their names to this grid for each number 1 you have. Then, apply roles to each name and decide on the easiest route forward.

Power (High / Low)

	Low Interest	High Interest
High	Listen for system or process objections	Keep informed; ask for help
Low	Listen for implementation objections	Look for ways to involve

Interest (Low / High)

Power (High / Low)

	Low Interest	High Interest
High	Listen for system or process objections	Keep informed; ask for help
Low	Listen for implementation objections	Look for ways to involve

Interest (Low / High)

Power / Interest Grid (top)

	Low Interest	High Interest
High Power	Listen for system or process objections	Keep informed; ask for help
Low Power	Listen for implementation objections	Look for ways to involve

Power (vertical axis: High / Low)

Interest (horizontal axis: Low / High)

Power / Interest Grid (bottom)

	Low Interest	High Interest
High Power	Listen for system or process objections	Keep informed; ask for help
Low Power	Listen for implementation objections	Look for ways to involve

Power (vertical axis: High / Low)

Interest (horizontal axis: Low / High)

Step four: write a business case

Back at the start of this section we said there are only two fundamental grounds on which to justify a project: does a project increase a business's revenue or does it make a business more effective?

Now that you know which option to build your project on and you know the two principals to base your business case on, the last step is simple – write a business case that will appeal to the key decision-making stakeholders in your grid. Ideally this will be the camp that has high power and high interest in your project.

In our example above, the project option is to increase the social media presence of the company. The key decision-making stakeholders in high power and high interest camp are Claire (Head of Marketing), Staci (GM) and Bill (Head of IT).

Your job is now to write a short business case that will appeal to these three people making the case that the project will either generate revenue or make the business more effective (or do both).

In our example the business case could be:

> *Social media works. It's a powerful tool to raise a business's profile. In fact, Sir Richard Branson, founder of the Virgin Group said, "Embracing social media isn't just a bit of fun, it is a vital way to communicate, keep your ear to the ground and improve your business."*

> *In our industry social media has been neglected by 76% of our competitors. That means if we get in now, we stand a good chance of dominating social media in our industry.*

> *What would that mean? A recent study showed that for every dollar spent on raising a company's social media presence, revenues increased by 10%. And not only that, but having such close contact with customers means we can better target the needs of our customers.*

> *By giving this project the green light, you'll be giving our company a social media presence. You'll be growing our business and starting a vital conversation with our customers.*

Make sense? Now you give it a go.

Try it yourself:

Write a business case for your project.

Section Four: Establishing Governance

"Examine what is said and not who speaks." ~ Unknown

In the last section we looked at four types of stakeholders.

The key to effective governance of a project lies with two of them: those with **high power, low interest** and those with **low power, low interest**.

Why? Because there's a reason why they're not interested in your project. And, if you're willing to listen, these people are telling you something important. They're telling you what's wrong with your project.

If the goal is sound governance, what you need to know is what problems your project is facing.

Going back to our example, if we were to imagine (or better still, find out) the objections to increasing the company's social media presence from people in the **high power, low interest** and **low power, low interest** camp, we might find objections such as:

- Bob S – Senior Manager: change to market share may not be caused through a social media campaign; start-up costs and on-going costs could be a waste of money
- Andrew – Senior Manager: not all customers in the company's demographic are tech savvy
- Jill – admin: hard to track market changes reliably
- Trevor – front line staff: front line staff will have to post things to company site
- Carla – front line staff: too late to jump on social media bandwagon
- Jude – front line staff: have tried tech solutions to market share before and they haven't worked

To develop robust governance, the project manager in the example needs to develop a system or process to address each issue. Not only will this allow for effective governance, it also helps to bring each person on board as their objection is heard, understood and acted on.

Try it yourself:

Either speak directly to the people in your **high power, low interest** and **low power, low interest** camps or try to understand what their objections might be.

Then develop meaningful systems or processes to address their objections.

Section Five: Developing a Plan

"Plans are worthless. Planning is essential." ~ Dwight D. Eisenhower

There are many reasons why some project managers pay scant attention to the planning stage. For some, the fact that plans never go according to, well, plan is reason enough to jump straight to implementation. For others, a myriad of variables makes it hard to plan effectively. And then there are those who feel planning kills creativity.

The truth is just as Eisenhower called it: plans never work out, but having one means you know what you're deviating from and have more options when things do go wrong.

So first off, let's review the key components of your plan.

A useful plan includes:

- Objectives
- Available resources – financial, human, materials, IT, etc...
- Key tasks with key personnel for each task
- Timelines
- An identification of risks
- The establishment of contingencies
- An effective communication process

There are two planning strategies.

Strategy one: planning forward

Planning forward is the well-worn planning path. It's what most people do several times a day: you set a goal, and then develop a plan to reach it. One step at a time. Here's an example of a forward plan from the Eclipse Process Framework project:

Phase	Iteration	Primary Objective (risks and use cases scenarios)	Scheduled start or milestone	Duration Estimate (calendar days)
Inception/ Warm-up	M0	• Project acceptance and provisioning. • IBM donation. Project environment established. • Committer meeting. Project organization and plan agreed to.	12/23/2005 1/15/2005	24 days
Elaboration	M1	• Legal process to be completed by initial committers • Train all committers. • Provision project, set up website, mailing lists, etc. • Agree on structure of OpenUP; agree on how to structure of OpenUP into work units, principles and resources to evolve each unit. • Identify outreach activities	1/16/2006 2/28/2006	43 days
Elaboration	M2	• Agree on naming conventions • Agree to key structural information for OpenUP (e.g. tasks, work products, etc. defined) • Engage with additional contributors • Agree on user experience and have a few examples for OpenUP • Validate extensibility / composibility of OpenUP	3/1/2006 4/15/2006	45 days
Elaboration	M3	• Identify an initial set of key promoters presenting at conferences, writing blogs and articles, etc. • Agree on general structure of OpenUP	4/15/2006 5/31/2006	45 days
Construction	M4	• Produce realistic plans for M5 • Agree on a management process • Have all structural content decisions taken • Have 30% of content ready for review • Plan Agile2006, SD Best Practices, and other outreach activities	6/1/2006 7/16/2006	45 days
Construction	M5	• Finalize structure • Improve usability and first impression • Review 30% of content • Make additional 30% of content available for review • Establish a functioning management process for the project • Establish a review board • Produce initial draft collateral for EPF 1.0 launch • Make preview at Agile 2006 successful • Start to build a user community. Identify 2 pilot projects.	7/17/2006 8/4/2006	21 days
Construction	M6	• Improve usability and first impression • Have 60% of content reviewed • Make the final 40% of content available for review • Produce more draft collateral for EPF 1.0 launch • Continue building a user community	8/7/2006 9/1/2006	28 days
Transition / End Game	M7	• End game • Finalize content 0.9 • Finalize launch collateral • Plan next release	9/4/2006 9/29/2006	28 days

As you can see, a forward project plan sets out the tasks in a linear order and assigns resources and timelines. It's a useful way to keep track of a project and have a clear sense if the project is on course.

Strategy two: planning backwards

Planning backwards does something different. Planning backwards is just like it sounds; it starts at the end and asks, "What do I need to do a week before to make sure I get to that project stage by the end of the week?" Of course, you don't have to plan backwards by weeks, you could do it by days or months; whichever makes most sense for your project.

In our example planning backwards might look like this:

Project time frame: 6 months beginning June 1, 2015
On November 1, 2015 – social media platform is in place and reporting is underway 　　Tasks: 　　Resources needed: 　　People responsible: 　　Identified risks: 　　Contingencies: 　　Communicated by:
On October 26, 2015 – final testing of social media platform is completed 　　Tasks: 　　Resources needed: 　　People responsible: 　　Identified risks: 　　Contingencies: 　　Communicated by:
On October 19, 2015 – final testing of market share reporting mechanism is completed 　　Tasks: 　　Resources needed: 　　People responsible: 　　Identified risks: 　　Contingencies: 　　Communicated by:

Some of the advantages of backward planning are:

- It avoids mistakes in the first few steps that can occur in a planning forward approach
- It helps identify milestones that can be overlooked when planning forward
- It helps identify potential risks that can be overlooked when planning forward
- It helps establish realistic time lines for tasks
- It helps project teams understand the project flow easily

Try it yourself:

Write a backward project plan for your project.

Developing contingencies

One of the biggest drags on a project can be the time spent developing *Plan Bs* or contingencies for identified risks.

The simple truth is lots of things can go wrong, but not everything needs a Plan B. Here's a simple equation to help you work out if you need a Plan B for an identified risk:

Need for Plan B = (Probability of Plan A going wrong) x (the impact of that problem on the project)

The greater the impact, the greater the need for a Plan B. You can apply the same idea to your Plan Bs and create levels of redundancy. That's just what NASA does for key components of a launch.

But don't get carried away with that – levels of redundancy may make sense if you're NASA and lives are at stake. If you're launching a social media campaign, it probably makes less sense and could slow your project down.

Try it yourself:

Apply the contingency equation to the risks in your backwards project plan and develop Plan Bs for those that need them.

With your plan complete, you're ready to implement your project. But there's still work to be done. After all, how do you know the project is running smoothly?

That's the next and last step.

Section Six: Project Implementation – Review & Revise

"Even if you are on the right track, you'll get run over if you just sit there." ~ Will Rogers

Now that your project plan is being implemented your role as Project Manager enters a different phase.

Your Project Sponsor, the person who approved your project, will want to know everything's working as it should be and that any problems are being taken care of.

That's why, as the project enters the implementation stage, your role is to monitor and assess the success of the project.

Some of the key elements you may want to review are:

Is the project currently delivering to schedule? If not, why not?

Is the project within budget? If not, what cost savings can be identified?

Are deliverables being met at key stages? If not, what needs to change?

Are risks being managed? If not are Plan Bs ready to be implemented?

Have any unforeseen issues arisen? If so, how are they being handled?

Your ability to anticipate and stay ahead of potential problems is the key skill of a project manager at the implementation stage. By asking yourself these and other project specific questions, you'll be giving your project the best chance of succeeding.

Section Seven: Three Tips for Success

"A project is complete when it starts working for you, rather than you working for it."
~ Scott Allen

And finally, here's three tips to help you make your projects as effective as they can be.

#1 Projects live or die on how well communication flows. Take time to establish short daily updates for the project team and clear lines of communication for giving feedback and flagging problems.

#2 At some point the project needs to stop being "yours" and become the team's. To create project ownership don't be afraid to give your project team responsibilities and hold them accountable.

#3 It's easy to see people who block your project as enemies. Don't. These people are giving useful information about changes you may need to make to your project. Listen to what they have to say, knowing that identifying problems early saves time, money and effort down the road. Then decide what, if anything, needs to change.

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