Rapid Read Series

Project Power

Secrets For Setting Up Your Project For Maximum Effectiveness And Efficiency

By
Dr. Keith Mathis

The Mathis Group, Inc.
106 Lakeview Woods
Eureka, MO 63025
800-224-3731
www.keithmathis.com
kmathis@ix.netcom.com
GSA Contractor Number: GS10F0383M
Project Management Institute Registered Global Education Provider

This publication is designed to provide accurate and authoritative information in regard to the subject matter covered. It is sold with the understanding that neither the author nor the publisher is engaged in rendering legal, accounting, or other professional service. If legal advice or other expert assistance is required, the services of a competent professional person should be sought.

Published in the USA by
Equipper's Press International
For Ordering Additional Copies
Contact the Publisher Directly
Or

Dr. Keith Mathis
The Mathis Group, Inc.
106 Lakeview Woods
Eureka, MO 63025
800-224-3731
kmathis@ix.netcom.com
www.keithmathis.com

Table of Contents

Project Power

This is the first in a series of booklets focusing on project management principles. Project leadership and their team members will find this series a valuable tool in working a successful project plan. This first booklet focuses primarily on phase #1 of the project management process, *Secrets For Setting Up Your Project For Maximum Effectiveness and Efficiency*. Its purpose is in giving details and techniques on how to set up a project in a correct fashion so planning will be easier and more thorough. The creation of the project plan will be specific to Phase #2. Other phases of project management such as monitoring, tracking, close down, and post mortem will be covered in additional Rapid Read Series booklets.

Secrets for Setting up Your Project for Maximum Effectiveness and Efficiency

Many things influence project management today. When we look at projects today compared to fifteen or twenty years ago, we notice a big change. In the old traditional setting, the boss might not even ask for any input, but today team involvement is critical. In a team setting, people are encouraged to give ideas and make decisions. This change governs how projects today are run. Gone is the traditional way of running projects where the boss made the decisions, figured the timeframes, and set all objectives. Today, we need more and more team members who will take the necessary leadership and move the project forward. This becomes a struggle with expectations and culture. This becomes even more difficult with organizations that have strong governmental, military, or influential bureaucratic drivers which can complicate the projects.

It is a fact project management is here to stay. This means more decision making power must move down to the front line level. When this is carried over to the project team, this means you must create decision makers, not order takers. Employees must be taught to make decisions. The need for these skills will not change in the future. The expectations today are that employees can and will make these important decisions. Yes, some traditional supervisors will struggle giving away their power. They mistakenly think they have lost control and are giving their jobs to another. However, in today's organizational culture, this way of thinking is being replaced by a progressive, proactive project management style – Project Power.

Mapping of Project Management Processes (PMBOK – Guide – 2000 Edition, Page 38)

Knowledge Area \ Process Groups	Initiating	Planning	Executing	Controlling	Closing
4. Project Integration Management		4.1 Project Plan Development	4.2 Project Plan Execution	4.3 Integrated Change Control	
5. Project Scope Management	5.1 Initiation	5.2 Scope Planning 5.3 Scope Definition		5.4 Scope Verification 5.5 Scope Change Control	
6. Project Time Management		6.1 Activity Definition 6.2 Activity Sequencing 6.3 Activity Duration Estimating 6.4 Schedule Development		6.5 Schedule Control	
7. Project Cost Management		7.1 Resource Planning 7.2 Cost Estimating 7.3 Cost Budgeting		7.4 Cost Control	
8. Project Quality Management		8.1 Quality Planning	8.2 Quality Assurance	8.3 Quality Control	
9. Project Human Resource Management		9.1 Organizational Planning 9.2 Staff Acquisition	9.3 Team Development		
10. Project Communications Management		10.1 Communications Planning	10.2 Information Distribution	10.3 Performance Reporting	10.4 Administrative Closure
11. Risk Project Management		11.1 Risk Management Planning 11.2 Risk Identification 11.3 Qualitative Risk Analysis 11.4 Quantitative Risk Analysis 11.5 Risk Response Planning		11.6 Risk Monitoring and Control	
12. Project Procurement Management		12.1 Procurement Planning 12.2 Solicitation Planning	12.3 Solicitation 12.4 Source Selection 12.5 Contract Administration		12.6 Contract Closeout

Figure 3–9. Mapping of Project Management Processes to the Process Groups and Knowledge Areas

History of Projects

Projects probably can be traced back to the time of the pyramids. Pyramids had some type of plan, designation of labor and manpower, and a time schedule. Yes, this example has holes in it because the labor force during this time was probably slaves, but there are many things about these pyramids which cause us to be amazed at what they could accomplish with such limitations of tools and machines. This amazement can reassure us that we, too, can complete projects even with limited resources and without the newest technology.

What Is Project Management?

Some people mistakenly think project management is only the ability to run software and technology effectively. Yes, it is true software and technology can make a project run smoothly. However, it is more than just software. Project management has two main areas of focus - a plan and a process.

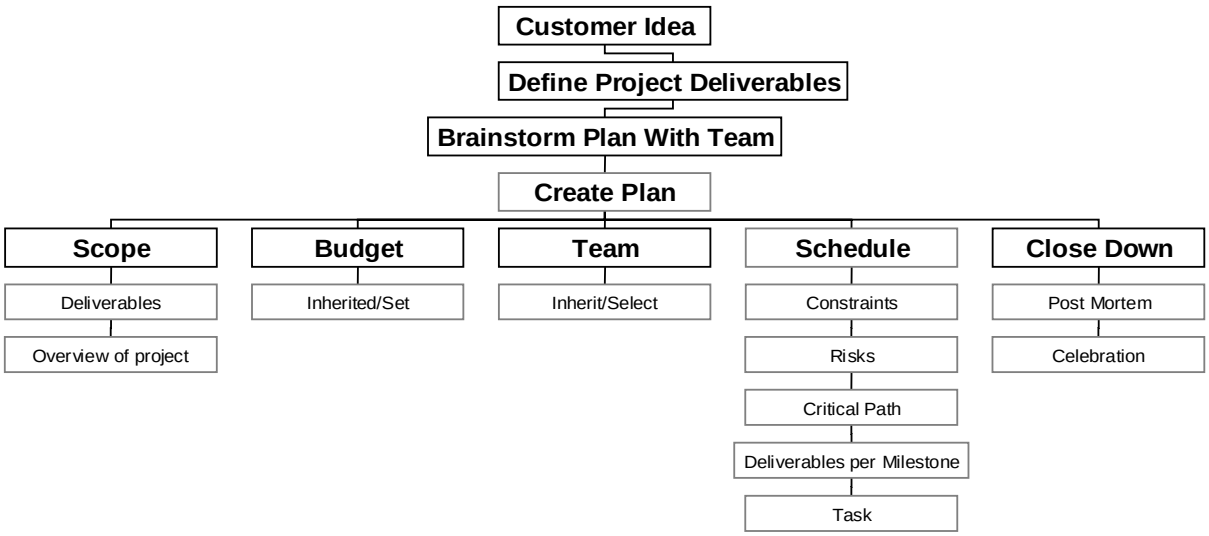
- ***It is a plan.***

Project management can also be defined as a plan which runs a project to its completion using people, a budget, and resources. Leaders with solid project management skills will utilize team members, money, equipment, materials, and time to formulate a plan to accomplish a desired set of goals.

- ***It is a process.***

Project management is nothing more than a specific process that is put into effect to obtain a certain result. The more efficient the process, the more control the project leader has in making sure designated outcomes can be reached with certainty. Project management involves people, along with technology, to run a project. People drive the project and make it successful.

Overview of Project Management Process



What Makes Project Management So Different?

Projects come in every shape and size. Many are attempted with no past history which means project leaders are faced with a constant learning curve. Projects bring pressure to the work environment. Project leaders are often responsible for many tasks, but they must deliver quality results. Team members may also have the responsibility of working on more than one project at a time, and this may create a stressful working situation. Resources are often limited, but expectations for the project leader and team are high. Good project management works with all these negatives and formulates a project plan with realistic outcomes in a realistic schedule.

Who Are Your Customers?

External customers are those for whom you complete the project. They are the ones you try to satisfy with the project's outcome. You normally have a good grasp of how they want the project to run, and you try to deliver great customer service to them. However, there is a second customer whom you will encounter in running a project – the internal customer. Make sure your project team gives both types of customers great service and value.

External Customers - Projects are normally completed at the request of external customers. They initiate the project and will pay for your services. The project is then designed to address a need or problem they have and strives to meet their organization's goals.

Internal Customers - Internal customers are people who provide some sort of service to you as you implement the project plan. There are many people who support and help the project team be successful in completing the project.

Phase #1
Determining Project Specifics

Phase #1

Determining Project Specifics

When you begin examining project specifics, you will find there are many benefits for thoroughly interviewing the customer and carefully planning the project. First, when you gather information up front, you will be able to clarify the skills and expertise needed in the project. You will be able to pinpoint roles and responsibilities for project team members. Second, you can begin setting up your project for easy monitoring of schedules, even though later in phase two is where you apply it with depth. Third, you will be able to brainstorm ways to complete the project on budget and schedule because you will know the real scope of the project. Finally, you will be able to detect problems in their early stages. You do not want to be blindsided and surprised with something you have overlooked. For an example, you have been running a project and schedules have been slipping for three weeks, but no one has told you anything. Now it will cost you major dollars to fix the problem when three weeks ago, you could have done it for almost nothing. You will be able to anticipate these potential bottlenecks or resistance to your project.

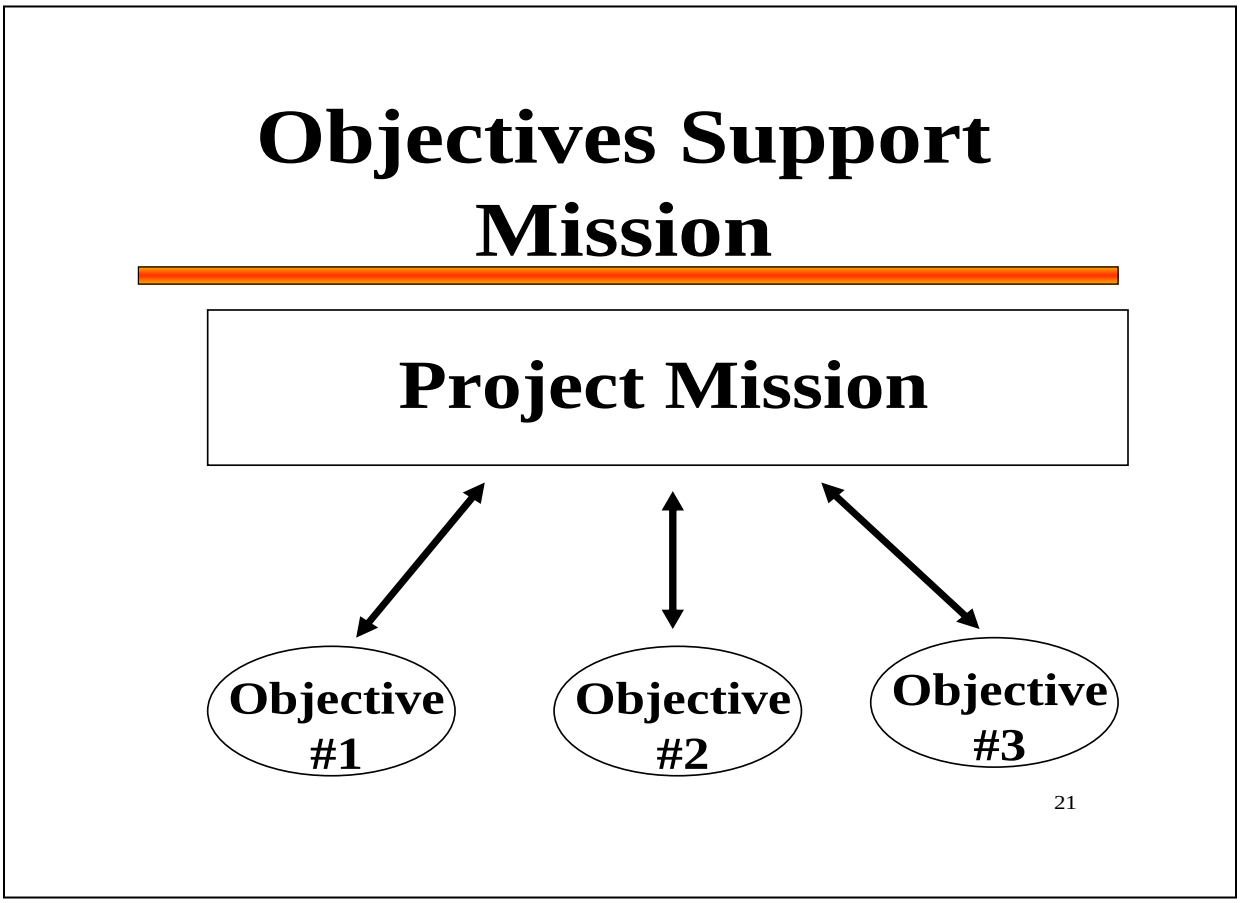
In our culture we are encouraged to go, go, and go. We think activity means progress even if we do not know where we are heading. By gathering information based specifically on the customer's wants and desires, you can better formulate your project plan.

Project Mission

The project mission focuses on the reasons why the project exists and which deliverables will be reached when finished. When you begin planning a project, all areas must be nailed down in the minds of the project team. Everyone must understand and remember the goal. If they

can focus, they will not waver in the duration of the project. They will instantly measure any and all changes to the goal and make decisions accordingly.

The project mission will have objectives and deliverables which support the project and align with the organization's mission as a whole. Sometimes projects are border line in following the company's focus; we call them "pet projects." They are very low on the priority list as far as alignment to the organization's mission. These projects are pushed by systems in power, but when money and resources become tight these projects are often tossed or at least placed on a back burner.



5 Steps In Creating Project Objectives

- ***Objectives must support the project's goal/mission.***

Interviews set the tone for what is coming down the pipeline with your project. You must acquire correct information in a thorough interview in order to establish relevant objectives to meet the goal of the project. Sometimes you must ask hard questions to discuss the bottom line. Remember, you are in charge of asking questions, and if you are not obtaining beneficial information or if you simply do not understand, you need to rephrase the question. Sometimes it is even good to ask, "What would be good to know about this project that I have not asked you?" The customer will expose extra information that is almost always helpful.

- ***Objectives must have some way of being measured.***

Evaluate your project's core objectives; make sure they can be measured for completion. Often, objectives will focus on improvements but with little specifics for measuring progress. It is human nature to want to see success. Do not set your team up for failure with objectives which are too large or unclear. These can not be measured and will only cause frustration and ultimately hurt morale for future projects.

- ***Objectives must have a deadline set for achievement.***

Don't just throw out a time or date. If you are just picking a date from the air, then you are doing nothing any different from those who create a project plan without information. Make sure you take into account all the issues the project and the project team are facing. Many objectives will have only a brief statement while others will be numbered with detailed sub points.

- ***Objectives must give team members authority.***

Authority can be defined as the power, right, and stamp of approval to make decisions. By making an assignment to a particular person, it will become a high priority. Do not be afraid to give people a milestone or a

series of tasks which all support a larger piece of the project. By delegating pieces of the project, it is easier for individuals to control and advance the project. Remember, though, people need authority to run their portion of the project. Authority demonstrates trust in that person and gives the freedom to make a certain range of decisions.

- ***Objectives need to be documented.***

Documentation will keep you and your team focused on the project. Documentation will help clarify where you have been and in what future direction you are headed. Yet, documentation seems to be one of the weakest areas on all project teams. We often close out a project with little or no documentation, and we have no new ideas, processes, or best practices to pass on except what we have kept logged in our memory. Sometimes, we even pitch our project notes taken during meetings throughout the project. Yes, it is important to document all projects and maintain a register of what has been discovered throughout the project. This type of documentation is invaluable for the future establishing of project best practices.

- ***Objectives drive the project forward.***

As you have meetings and discuss objectives and deliverables, you need to make sure you are driving the project forward. This is accomplished best by making sure you have action plans and assignments throughout the project. This should include specific actions steps and detailed implementation plans. You also must decide how you will measure each objective or deliverable. This forces you to create progress indicators throughout the project for measuring. This is why you have

Gantt charts, time charts and critical path charts to help measure the progress of the project. These charts will be discussed in more detail and with more specifics in future phases. The following chart will demonstrate one way of tracking each action.

Action Item #	Action Item Description	Assigned To	Date Reported	Due Date	Status	Resolution/ Comments
1	Create pilot plan for testing project deliverables.	Bob J.	5/29/xx	7/1/xx	On Time	Pilot Project finished by 6/25/xx
2	Check on building contractor availability for making adjustments to present structure.	Tim M.	5/29/xx	6/1/xx	Behind	Discussions and meetings have been ongoing. Nothing nailed down on availability.
3	Talk to the Graphic Arts department about changing the colors on our project logo. Bring estimate of cost and effort to the next status meeting.	Barbara G.	5/29/xx	6/16/xx	On Time	A meeting is schedule for 6/5/xx

Setting Measurable Project Objectives

Examine ten projects at random, and you will see some of the worst written objectives. Project objectives are often hard to track, vague, and lacking in depth. In project objectives, people need details to help know where they are in the process, and data helps them make informed decisions. I like to recommend "DISCO" when forming objectives. "DISCO" can be spelled out to point us in the proper direction for creating project objectives and tracking their progress.

- ***D – Detail specifics.***

Give as much information as possible and make these objectives very specific. Far too many objectives have been set which are very gray in nature and lack data to help team members understand all specifics.

- ***I – Include qualitative and quantitative measurements.***

Objectives must be measured. When you look at an objective, you must ask, "Can we measure this?" If not, it needs to be rewritten so that it can be measured and tracked for successful completion. The only way to do this is to make sure qualitative and quantitative components are set.

Qualitative measurements measure a project based on quality standards, quality indicators, or quality characteristics. Defect ratio, break down ratio, and improvement needs are all to be considered. Each of these can be prioritized and broken down into a specific tracking mechanism to follow and monitor.

Quantitative measurements measure the project based on numerical indicators. Some of the most common quantitative measurements are time, budget, production, work hours, process time, and development progress. Quantitative measurements normally include the need to set a series of benchmarks as a starting point to begin tracking.

- ***S – Seek consensus with the team.***

Making sure the team agrees with the measurement is very important. Sometimes objectives are set at the beginning of the project, and they are very loose. When the team sets a standard of measurement, it will usually be detailed and understandable. It is important because the team needs to be on the same page during planning. They must agree that these standards are the best possible measurements considering the project.

- ***C – Create a reasonable approach in obtaining those objectives.***

The approach for reaching objectives is very important. Unless the approach is understood by the entire team and supported, there will be conflict in the team's processes. Conflict means you will have people going in different directions and using various methods.

- ***O– Operate in a methodical timeframe.***

Setting up a timeline and follow it. This timeline must make sense and be publicized to the entire team. You must constantly focus on maintaining clarity.

An example of a great DISCO objective is, "We will design 15 training courses that meet organizational development guidelines by June 30 with a budget of $483,000. We will include courses on supervision, communication, performance appraisals, and creating an optimistic workplace." DISCO objectives can be very successful in pushing the project forward and bridging the gap for communication. However, good objectives will never write themselves, nor will they track themselves.

Interviewing The Customer

Many project plans are created on a superficial level with little depth. This is due in part to a lack of understanding of the real objective or scope of the project. In order to create an effective project plan, do a proper interview with your customer. The external customer and the internal project sponsor who is designating the resources for the project both need to be interviewed. When plans are designed without a detailed interview, there may be major holes which can hurt the efficiency and cost resources.

Interviewing the customer will help you pinpoint how the customer wants the project to run. Create and adjust your questions to fit the industry and the particular customer. Phrase these questions so you can gather relevant information and break down the customer's specific objectives and scope.

- ***Explain some of the particular characteristics of the organization's culture or internal dynamics.***

Know the culture or internal dynamics of the organization where the project will be implemented. In many projects, the culture will not mean

anything. In others, the culture can sabotage a successful completion. For example, when the culture is hostile or the organization is experiencing conflict, a project may be hindered. Knowing this ahead of time can enable the team to make needed adjustments early for success.

- ***Who are the main players in the project?***

This points us toward organizational support for the project. Look for people with position power who can help push the project, or a piece of the project, forward to completion. This information and the ability to contact these people give you a degree of leverage which can be used at very strategic times.

- ***Detail the internal politics surrounding this project.***

Politics within a project can make a difference in planning and funding. Priorities may be adjusted. For example, many projects with government agencies were placed on hold or even stopped since 9/11 and the Iraq situation. Each of these decisions by our government caused all departments to adjust their budgets and resources to support only the highest priority projects.

- ***Are there any hidden issues or agendas that we need to know about?***

It is important to know if there are hidden issues in the organization. Sometimes these little secrets can influence the project in a negative manner. For example, I once had a team member say to me, "I don't know if this is a hidden issue, but you should know that our CEO's girlfriend is on the project team." I asked, "Is this a problem?" He said, "Not if you do what she says." By knowing this up front, I could anticipate and minimize potential problems. Usually, if given an opportunity, people will share these hidden issues with you.

- ***Are there any major areas of resistance that could hinder or defeat the project?***

You want to know what resistance you will be facing when beginning a project. Your customer may say, "We are not sure what the future holds." This is a warning statement for potential resistance. Many companies experience a buy-out or a reduction in the workforce. Many anticipate new leadership coming into the organization. You know that new leadership often will slant a new direction and change the priorities of the company. If job reduction is expected, workers will be filled with distrust and not focused on the project's goals.

- ***When this project is completed, describe what it should look like or how it should function.***

In the interview, your customer will tell you their desired end goals. The customer might not know all the correct project terminology to use when explaining issues concerning the project. However, listen to them tell you about their goals and projected outcomes; you will pick up insightful information as to what they hope to accomplish with the project. For example, you may have a customer who wants a technical project. They might know what they want to do, but they are not aware of the technical terms. Jargon, brand names, and unfamiliar terms confuse the customer because you have taken them outside their comfort and expertise zone. You will have a communication problem from the onset.

- ***Once the project is underway, what type of reporting schedule would you prefer?***

This question allows you to know how much input and feedback you will need to give the customer. When you neglect this question, you run the risk of the customer having a misperception of how often you are going to share updates. The customer may be assuming a weekly update; you may be thinking monthly. By the time a meeting is set to provide feedback, the customer is upset.

- ***Who analyzed and set the timetable?***

This is very important. The timetable is what drives the budget and plan for the project. Unfortunately, many timetables begin as guesses and evolve into a real timetable without being analyzed. Sometimes, people even feel it is unnecessary to figure a functional timetable; dates and times are simply thrown onto the paper with assumptions that the project will get done. With only one project being run, perhaps it will. However, in many organizations, multiple projects are being run by a skeleton workforce, and a timetable for each project is a necessity.

In the interview, you may discover your customer is experiencing frustration and stress from unrealistic time deadlines. Suggest recalculating the timeframe; how tight is the schedule? If the timing is off, you can discuss alternated with the project sponsor or the customer. At the very least, you have notified the project sponsor that the timeline is unrealistic as is, and you will need additional resources.

- ***Do you feel the time schedule is realistic and doable with the present resources?***

Sometimes the timeframe is not figured by the project team doing the project. It is mistakenly completed by people who do not have all the needed information. Progressive organizations are moving away from the project sponsor or the project manager setting the schedule alone. In addition, input from the frontline workers is gathered to determine the time schedule. Frontline employees are some of the best untapped knowledge and expertise in any company.

There is a second common error committed in figuring time schedules. Project plans are often set to mistakenly schedule people for 100% of their time. This will set them up for failure. Organizations do not run at 100% efficiency, and neither do project plans. In most cases, scheduling people at a 70% ratio allows them 30% of their time to attend

meetings, plan, and deal with weekly setbacks. There will be unexpected problems, administrative issues, and emergencies which will require time.

- ***If we discern the timetable or budget is severely off, how do you want us to handle it?***

With this question, you are giving them the opportunity to say, "Come back and talk with us." Encourage this response so that discussing needed changes in the future is a strong probability for running the project in a smooth fashion.

Defining the Project Scope

Every project should have a scope and a detailed plan. The scope can be defined as the set parameter of a project. It normally includes four main areas: budget, timeframe, quality, and the deliverables or the objectives. If you do a detailed interview with your customer, you will have a thorough understanding of these areas and be able to establish the scope of the project.

Define the Scope

- **The scope can be defined as the set parameters of a project.**
- **The scope normally specifies the:**
  - *Scheduled budget*
  - *Scheduled timeframe*
  - *Level of performance or quality*
  - *Specific deliverables or objectives*

If you do not feel the scope is nailed down, you must ask more questions before moving forward. If the scope is wrong, you and your team will waste time and money. Having to redo a section of the project will only increase frustration. If the scope is loosely constructed, you have a scope in process. This means it is being set along the way. This hurts the planning process because you are in a constant state of change. However, it may be fine to have a scope in process if it is because the project is new and has never been done before.

Types of Internal Plans

A comprehensive project plan is a combination of numerous internal plans. By breaking down a project into the different plans utilized, you will be able to monitor its individual parts.

- ***Pilot Plan*** - The pilot plan is a plan used when a project is tested and completed prior to investing in a full project. During the pilot phase, it is not uncommon for the project to experience numerous adjustments. This is normal and will help save time and money in the long run. The pilot plan will focus on processes, quality, speed, and innovation. After the pilot, a full scale role out of the project will follow.
- ***Evaluation Plan*** - How do you know you have completed each phase of the project or each piece of the project? How are success and quality being evaluated? Evaluation plans help you know how things are running throughout the entire project. Project members need to evaluate continuously throughout the project and not wait until the end. This will reduce failure in the project.
- ***Equipment Plan*** – An equipment plan allows you to schedule the usage of equipment during the project. It reduces the chance of investing in more equipment than is necessary.

- ***Reporting or Communication Plan*** – How will you communicate with your customer? How often will you communicate with your customer? It is important that both you and your customer agree and understand how and when the communication will take place. Consider, too, how and when you will communicate with your team members. The project will run more smoothly and with less frustration if there is planned communication.
- ***Training Plan*** – Some projects will require customer training before transitioning the project over to the customer. This might include new processes or using new equipment. Sometimes, a very intensive training plan is needed to equip the customer.
- ***Transfer of Knowledge Plan*** – This plan will enable the organization to keep skills and knowledge within the company. In many organizations, external consultants are hired to work on projects. They might work for the organization for three years and know the project the best. When money gets tight, however, they are often the first to go. If no one has taken the time to transfer their knowledge base to someone who is still with the organization, there is a loss. Unless you have a transfer of knowledge plan, you will see skills and knowledge walking out the door. Secondly, companies hurt themselves with senior staff who are about to retire. These people may have been with the organization twenty or thirty years, and yet they often leave without any type of transference.
- ***Contingency Plan*** –Project planners are sometimes slow at building in risk and contingency planning into the project. This is due in part to faulty assumptions on risks. They assume their project will run smoothly with few problems. Regardless of the project, there will always be a snag to overcome. Go ahead and build in a clear examination of risk and contingency from a proactive stand point.
- ***Crash Plan*** – A crash plan can be defined as bringing the project or a piece of the project to a premature close. It can be for any number of reasons. When crashing a project, you must take into account the ripple

effect to resources, people, time, equipment, budget, and everything associated with the project. You must reexamine your entire plan and look for the holes you missed. Creating a crash plan which has depth and detail will make sure each of the resources and the new timetable are going to be met.

- ***Close Down Plan*** – How will you close down the project and hand it off to the customer? Who is doing what? Project managers sometimes have more of a drop-and-run plan rather than a smooth close down plan. You must have a strategic way to hand the project over to the customer. This close down plan is a joint effort giving the customer the project while at the same time the customer is taking it from you.

In summary, as you look at your whole project, you will see that it is like a big umbrella. It is nothing more than a series of smaller specific plans under the umbrella of the project plan. The better you are with these smaller plans, the better you will be at project planning overall. The better you are at holding people accountable to these individual plans, the better you will be overall in maintaining the project plan.

Six Ways To Give Proper Project Leadership

"Everything rises and falls on leadership." This quote is especially true in running successful projects. You must have strong leadership, or things fall through the crack. Every individual must be committed to do what they say they will do.

There are six ways to give proper leadership as you are setting up a project team.

- ***Create an atmosphere of trust and support.***

Successful project teams feel trust and support throughout the project. Trust cannot be demanded as some mistakenly think. Trust is earned. You must earn trust, and walk the talk consistently. Treat people in a respectful manner. People who are treated badly will unlikely be supportive and cooperative. Avoid and discourage lies and backbiting.

These kill trust and cause people to reject leadership. People can handle mistakes or even failure, but they cannot handle lies and disrespect.

- ***Spell everything out for your team upfront.***

Leaders sometimes try to do the soft sell for their teams. They approach the team with the attitude that the project will not take long and will not need hard work. After the team is committed to the project, the bomb is dropped as to exactly what it will require from them. The leader's credibility is destroyed, and in the future, red flags will go up when another project is proposed. It always works better to tell people the truth. By explaining the depth of the project and how much time you anticipate it will take for completion will build your credibility. Create the right foundation by explaining the process for handling problems, change orders, and assignments. By giving the team the information up front, you set a tone of respect and courtesy.

- ***Monitor and give feedback.***

Giving proper feedback on the positives and negatives of a project is very important. Leaders sometimes erroneously think that if they are not able to give their team rewards, they cannot do anything. Never underestimate the value of a pat on the back with a "good job" accompaniment. If you think people are doing a great job, tell them. In some cases, leaders praise people at the onset of the project but forget to include feedback over the extended time of the project. Remember, praise costs nothing. Point out positive actions with comments. This positive reinforcement helps keep people focused on the right track. On the other hand, you need to be willing to discuss where team members are lagging behind on the project. There must be a willingness to talk about whatever is needed to drive the project.

- ***Build the right team.***

Some project teams experience turf battles. Individuals argue and are uncooperative; they simply do not like each other. Communication and common courtesy can break down causing the project to suffer. Most

people are able to overcome their personal dislikes and still work together. However, the team leader is responsible for addressing any unsolved problems that jeopardize the success of the project. By carefully selecting the team members in the beginning, some of these problems can be avoided.

- ***Keep communication open.***

Keep communication flowing; it helps the productivity and efficiency of the project. Avoid one way communication which is only from top management downward. Communication is needed which crosses department lines and keeps everyone informed and on board. The creation of communication plans, as discussed earlier, can assist in this area.

- ***Keep the end goal clearly in mind.***

Leaders can become sidetracked and forget the need for monitoring the project dates. People may lose focus during a project and allow deadlines to drift. If the missed deadline is early on in the project, it can have a major ripple effect. Once a project starts running late, one missed deadline may lead to other missed dates. If not corrected, this ripple may continue until the end of the project. This creates much pressure for those working on the project down the road because they will inherit the project already behind schedule.

Important Issues To Discuss In The First Project Meeting

When you begin meeting with your project team, there are some foundational issues you must discuss to set the correct tone. These items set the proper roles, responsibilities, and expectations for each team member. If these issues are not addressed, some may unintentionally do their own thing and hurt the productivity of the team.

Issues To Discuss

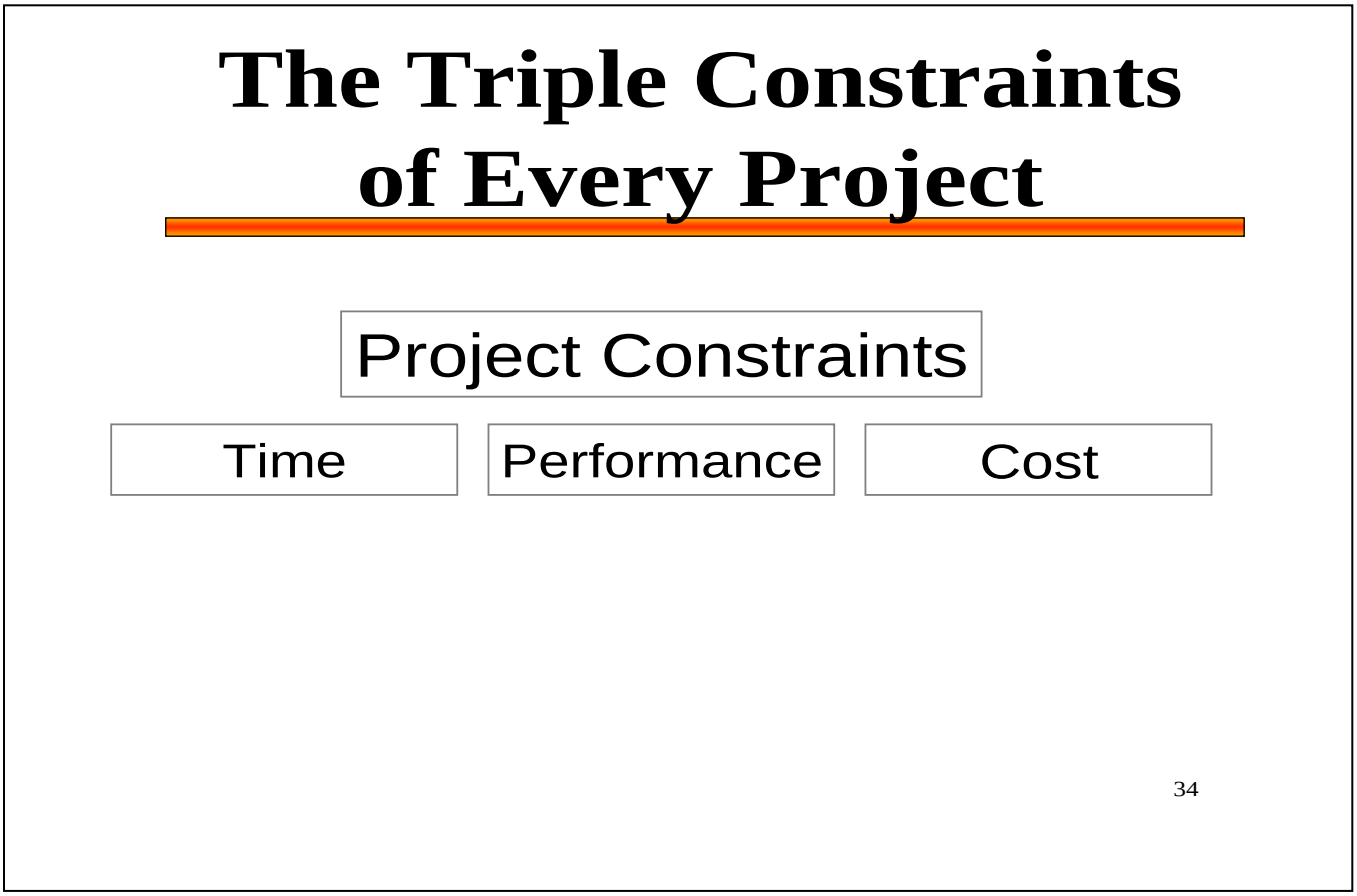
- **State the details of the project.**
- **Explain areas in which you are expecting direction and leadership from others.**
- **Explain how the project should look at completion.**
- **Point out major areas to analyze, brainstorm, and discuss.**
- **Explain all mandated dates, signoffs, and checkpoints.**
- **Set a time to create a code of conduct.**

32

Project Drivers

There are three primary drivers in any project: time, cost, and performance. These are called the triple constraints in project theory. Every project will have one of these constraints being monitored over and over again. Normally, this constraint is also the same one being monitored by the customer on a regular basis. This constraint is called the project driver. You can tell what is most important to the customer by noticing which driver they consistently track.

Don't be fooled, though. Just because the customer says the driver is cost does not mean that is the real driver. More times than not the customer will verbalize cost as the driver even when time or performance is the real one.



Approval and Sign-off

Gaining approvals for the project is different in each organization. In some organizational cultures, asking for approvals might not even work. However, most project leaders can use this technique of attaining approval points to benefit and nail down project decisions.

The following matrix can be applied for each approval point of the project.

Item/Action	Approved	Date	Approval Signature
	❑ Yes ❑ No		
	❑ Yes ❑ No		
	❑ Yes ❑ No		

Five Goals of Every Project

Project goals keep the focus on what is most important. However, on some teams these primary goals are lost in their meeting's activities. Make sure each meeting is structured so as to move the project forward. Even if the progress is only inches rather than by huge leaps, the team must be pushing the project forward as quickly, safely, and reasonably as possible.

- ***Finish the project within the scheduled timetable.***

Your goal should be to finish the project within the timeframe agreed upon. This means you must do everything possible to drive the project to the end and stay on time. Remember to avoid guessing and incompetence in the planning of the scope so as to have a reasonable time schedule with which to work.

- ***Finish the project within the scheduled budget.***

Budgets are set by some project teams while others inherit them. Whether you set the budget or inherit it, you need to make sure you are doing your best to track your expenditures and know where the money is going. When you finish the project within the scheduled budget, you demonstrate your ability in running the project responsibly.

- ***Finish the project with the same level of quality.***

Unfortunately, when projects lag behind, quality is often sacrificed in order to catch up. Project leaders sometimes feel that in order to pick up speed, pieces of the project will need to be downsized or cut completely. True, the project plan will have to be revised when problems arise, but the revision should never compromise quality. While it is important to keep deadlines, it is equally important to keep the project's quality high throughout the project

- ***Finish the project within the specified guidelines.***

Make sure you are meeting the customer's needs. You must "wow" the customer! This can be done simply by finishing the project with the

specifics the customer really wanted. The best way to solidify this is to verify your accomplishment by customer handoff and close down.

- ***Do the best you can with what you have been given.***

There is no such thing as a perfect project. Some projects run up against major odds and hurdles. For example, many recent projects in our country have endured major setbacks because of terror attacks, severe weather causing power outages, or a nation at war. Even against these catastrophes, projects were remarkably turned around and back on track because of great project team leaders and teams. Project goals were met because they did their best with what came their way.

Questions for Discussion

1. What can you do better to determine project specifics on the front end of the project?

   _____

   _____

   _____

2. List some ways you currently communicate project mission and vision to the project team.

   _____

   _____

   _____

3. In which internal plans can you use more help in creating?

   _____

   _____

   _____

4. In which internal plans are you currently doing a good job?

_____

_____

_____

5. What can be done to increase trust and support for future projects?

_____

_____

_____

6. What approval and sign off's would help you drive the project forward at a faster pace?

_____

_____

_____

Project Overview Sheet

Project Manager:
Project name:
Preparation date:

Project lead	Name of project lead and team members
Purpose of project	
Scope description	
Timeframe	
Resources	
Risks	
Project assumptions	
Specialized approaches	
Concerns or issues	

Communication plan	
Measuring criteria	
Change management plan	
Special processes	
Technology expectations	
Internal systems to examine	
Organizational culture	
Approval signoff	Project Manager: Sponsor:

Measuring Performance

Ideal Performance	Present Performance	Reason For Low Performance	Action To Fix Performance

Project Status Report

To: **Sponsor**
From: **Project Manager**
Date:
Subject: **Monthly Update**

Project # 777 **Server Conversion**
Green – On time
Yellow – Concern
Red - Missing dates and budget

Description of the project:			
Milestone Breakdown	**Responsible Team Member**	**Target Date**	**Status**
Milestone # 1			**Green**
Milestone # 2			**Red**
Milestone # 3			**Yellow**
Resources	**Responsible**		
Hrs **$**			

Overview since last meeting

- **Highlight #1**
- **Highlight #2**
- **Change order #1**
- **Change order #2**

Project Status At A Glance Update

Project Name
Project Completion Date MM/DD/YYYY

Project Sponsor:
Project Manager:
Project Description:

Status At A Glance	*Yes*	*No*
Will the project be finished by the due date?		
Will the project be finished within budget?		
Will the project maintain the proper level of quality?		
Are change orders being maintained and tracked?		
Are cultural issues being addressed?		
Are project risks being managed?		
Are communication plans being followed?		
Are customer feedback sessions being conducted?		
Are internal customer issues being managed?		
Explain all items checked "No"		
Major achievements on this project since last status		
Expected achievements before next status report		
Hurdles or concerns to report		

Meet Dr. Keith Mathis

Dr. Keith Mathis has emerged as one of the most effective business trainers in the field traveling throughout the United States, Canada, Mexico, and South America. His provocative, informative, humorous presentations on a variety of organizational development topics are demanded by progressive companies. An animated and often electrifying platform speaker, Keith never merely talks to an audience, but he also seeks to involve them in his presentations through high content and numerous illustrations. Intellectually demanding of himself, Keith demands no less of his audiences!

Keith is founder of The Mathis Group, a training and consulting company based in St. Louis, Missouri. His client base ranges from private industry to nonprofit organizations. He also works with government agencies through his GSA contract. He is flexible by teaching in full day formats, multi-day conferences, or keynotes.

Keith serves as an adjunct professor of business/management at Nova Southeastern University in Ft. Lauderdale.

Keith holds a B.A. in Behavioral Science, a M.S. in Management, and a Ph.D. in Administration Management.