


So You Are a Good PM . . .  
. . . How Confident Are You  
To Lead IT Projects?

PMISOC - GTISLIG  
Continuing Education Workshop  
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The Universe is hostile to the  
success of your projects.

What are you doing about it?

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**Presentation Objectives**

Have Fun While Learning!  
Learning Lessons . . . Take Aways



In the context of practical experience & lessons learned:

- Understand major differences regarding IT projects
- Bridge the Gap between the Theory & Practice of Project Management
- Provide a panoramic view of IT Project Mgt. practices
- Introduce the Basic "Ten Tools of the Trade" for the PM profession
- Review the use of tools for effective communication

Based on the book "Rainbows & Ratholes:  
Best Practices for Managing Successful Projects"

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### Project Success - The Reality

20% of the projects - cost overruns  
 60% of the projects - time overruns  
 29% of the projects - failed to deliver  
 \* Based on U.S. Govt. GAO Report

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### IT Project Management – RCA Failure Analysis

Classic Mistakes	Category	% of Projects
1. Poor estimation and/or scheduling	(Process)	54%
2. Ineffective stakeholder management	(People)	51%
3. Insufficient risk management	(Process)	47%
4. Insufficient planning	(Process)	39%
5. Shortchanged quality assurance	(Process)	37%
6. Weak personnel and/or team issues	(People)	37%
7. Insufficient project sponsorship	(People)	36%
8. Poor requirements determination	(Process)	31%
9. Inattention to politics	(People)	29%
10. Lack of user involvement	(People)	29%
11. Unrealistic expectations	(People)	27%
12. Undermined motivation	(People)	26%

Based on research by Prof. Ryan Nelson, McIntyre School of Commerce, Univ. of Virginia (7 years study, 74 organizations and 59 projects)  
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### Managing IT Projects What's the Difference?

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**IT Projects Vs. Engineering/Construction**

**Engineering/Construction Project Management**  
Receives a complete & detailed design with BOM; builds & turns over a completed office/building. Industry accepted discipline, processes and terminology

**IT Project Management**

- Identifying tangible end-products and deliverables is a challenge; Lacks the discipline and rigour of engineering; Young profession
- Design solution from concepts; decide build/buy, work with ambiguous requirements; construct the solution, test it, gain user acceptance, turn over to production & support
- Users don't know what they want; they only know what they don't want when you give them something
- Incredible/unbelievable pace of change; Staffing, training & continual skills shortage
- Business doesn't speak our (IT/SW) language but the PM is expected to know a whole lot of detail about the business and the technology
- Need to sell the project continually; Management of Change: changes to people, process and technology
- Project Manager expected to deal with politics, stakeholders, supporters, detractors
- How long will it take if it's only one line of code? – It's not just about coding!

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**What is Project Management?**

. . . the art and science of  
"Getting Work Done"  
with the active  
cooperation of your team

Art - -> Soft Skills  
Science - -> Methodology & Processes

**How do we do projects?**

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**Project Management Environment**

- Accelerated implementation schedules
- Downsizing, mergers & acquisitions
- Faster technology obsolescence
- New and unproven technologies
- Technology focused resources
- Business: Knowledge driven
- Organizational Perspectives & Politics

**. . . Who owns the project?**

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### Emerging Trends

- **Projects** → Means to Achieve Change
- **Hierarchical** → Projectized Management
- **Centralized** → Distributed/Virtual Teams
- **Technology** → People/Process Focus
- **Client/User** → Multiple Levels/Expectations
- **Stakeholders** → Conflicting Demands

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**Methodology, Team Building & Best Practices ...  
 on the back burner!**

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### The PM Challenge

Successful Delivery every time, on time

- Ensure consistency of approach
- Work towards predictable outcomes
- Adopt common processes
- Adhere to standard terminology
- Improve delivery capability
- Provide Value to Clients
- Form a cohesive team
- Establish credibility
- Get the work done!



**"Adopt a Process View" - The First Step!**

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### Project Management

"The PM is responsible for managing **all aspects** of Project Management"

<b>Utilize Work Force</b>	<b>Maintain Cost Control</b>	<b>Ensure Timely Performance</b>	<b>Control Work Content</b>
Project Organization	Resource Planning	Activity Definition	Authorization
Resp./ Relationships	Cost Estimating	Activity Sequencing	Scope Planning/Defn
Staff Acquisitions	Cost Budgeting	Scheduling & Estimating	Change Control
Team Development	Cost Control	Time Control	Business Objectives
<b>Integration Management</b>			
Risk Identification	Status Review/Report	Procurement Planning	Quality Planning
Risk Evaluation	Project Workbook	Solicitation/Selection	Quality Control
Risk Mitigation	Signoffs/ Closure	Contract Admin.	Quality Assurance
<b>Manage Project Risk</b>	<b>Collect And Disseminate Project Info.</b>	<b>Manage Contracted Goods &amp; Serv.</b>	<b>Manage Quality of The Project and PM Process</b>

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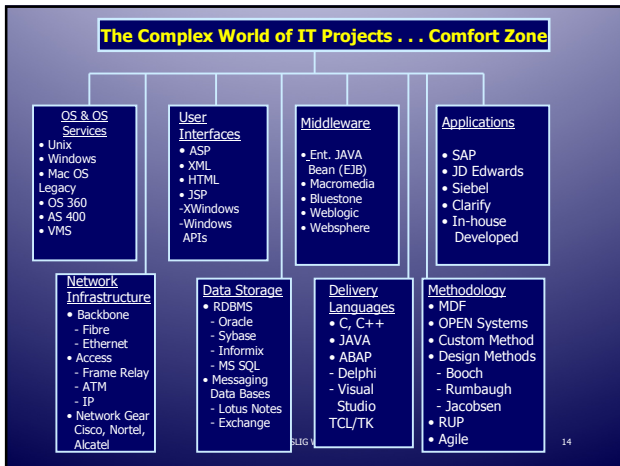
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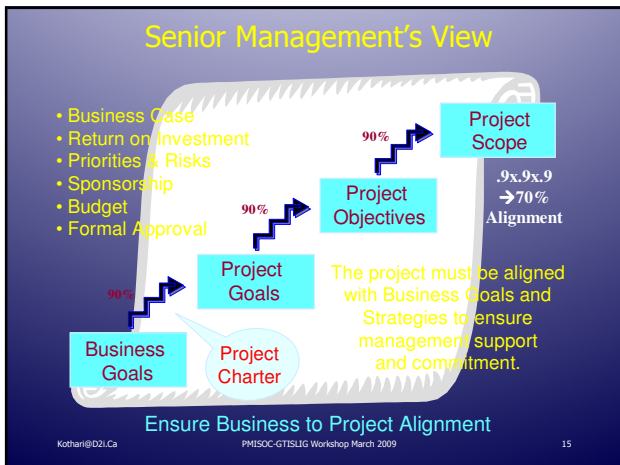
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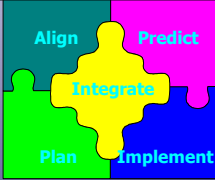
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Methodology – Who Needs It?  
 Pain, Paperwork & Policing, . . .  
 or  
 A vehicle to

- Align the project to the business
- Plan & implement the project
- Ensure predictability of process outcomes & results
- Manage scope & customer expectations
- Validate approvals, gating, Go/No Go
- Engage the Client



Methodology {  
 + PM Processes  
 + PM Phases (Org specific)  
 + Tools/Templates

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### Generic Life Cycle of IT Projects

- Justify:** Business Justification
- Initiate:** Pre-planning, Funding, Approval
- Plan:** Planning, Validation, Scheduling
- Agree:** Final Baseline, Vendor Contract
- Execute:** Develop, Test, Training, Cutover  
 Transition to Business  
 Management of Change
- Warranty:** Post Production
- Support:** On-going support, Enhancements

What is the life cycle in your organization?

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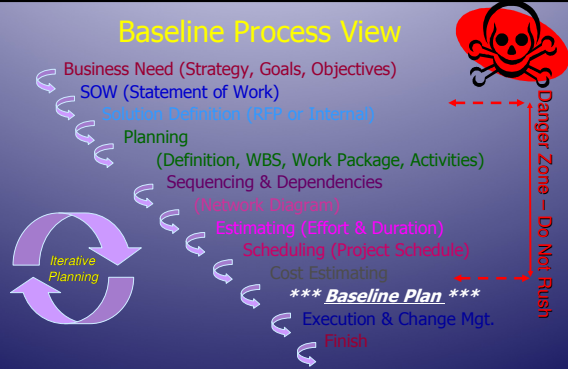
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### Baseline Process View



Business Need (Strategy, Goals, Objectives)  
 SOW (Statement of Work)  
 Solution Definition (RFP or Internal)  
 Planning (Definition, WBS, Work Package, Activities)  
 Sequencing & Dependencies (Network Diagram)  
 Estimating (Effort & Duration)  
 Scheduling (Project Schedule)  
 Cost Estimating  
 \*\*\* **Baseline Plan** \*\*\*  
 Execution & Change Mgt.  
 Finish

Iterative Planning

Danger Zone – Do Not Rush

Follow the Process to “Baseline” the Project, then  
 Use automated PM tools to execute the baseline plan

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## Understanding Requirements

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|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|---|---|---|---|---|---|---|

1. What's the Business Need?
  2. What are the Requirements that fulfill the Need?
  3. What is the Rationale for the Requirement?
  4. How will you measure it?
  5. How will you know that the Requirement was met?
  6. How does this Requirement relate to other Requirements?
  7. What's the priority and How important is it?
- Understand the **FURPS** for Requirements

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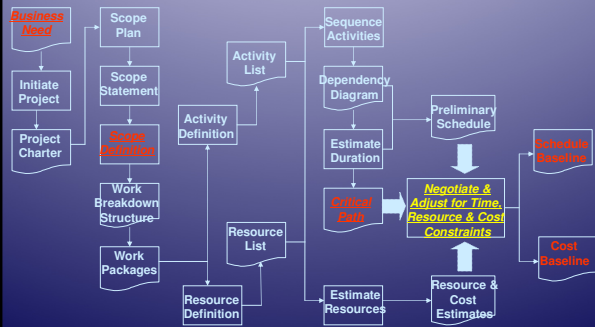
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## Baseline Schedule "The Journey is the Reward"



Baseline schedule ... Result of planning process & negotiations

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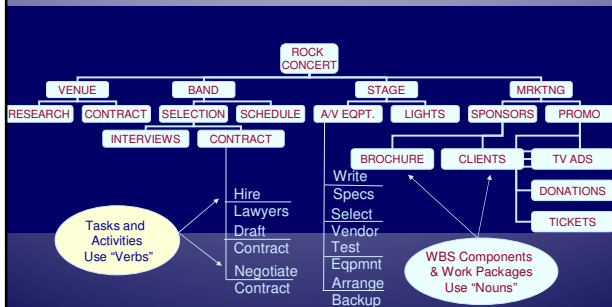
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## Scope or Work Content View How big is the project? What's in & What's out? Focus on "What" before the "How"



Define the scope with Work Breakdown Structure (WBS)  
 Decompose into Work Packages, Deliverables & Activities

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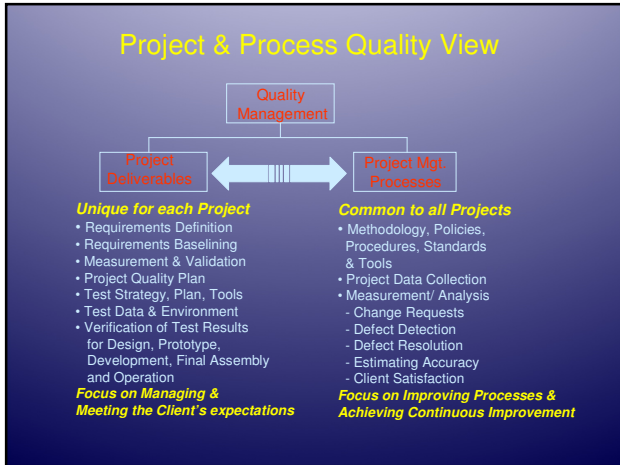
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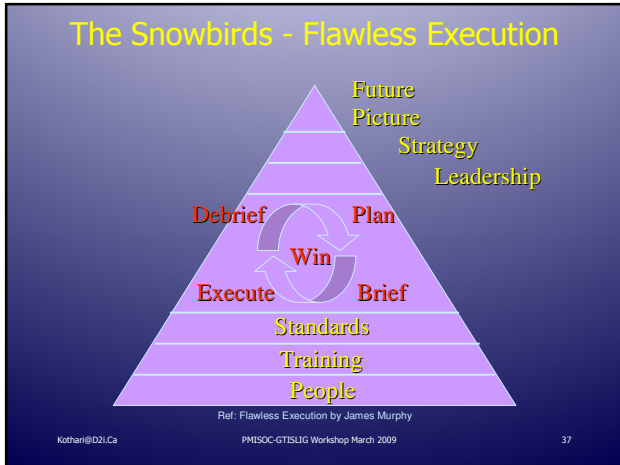
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### Flawless Execution

The "STEALTH" Debrief

- S – Set Time, Location, Prep
- T – Tone ... Nameless, Rankless
- Execution Vs. Objectives
  - Recount Sequence of Events
  - Did We Accomplish the Mission Objectives?
- Analyze Execution
  - Execution Error/ Success
  - Cause of Each Error/ Success
  - Identify Root Causes
- Lessons Learned – Prominent/Recurring Root Cause
- Transfer Lessons Learned \*\*\*
  - Accelerate Experience; Improve Future Execution
- High Note ... Positive Simulation

**Brief and Debrief every single time !**

Ref: Flawless Execution by James Murphy PMISOC-GTISLIG Workshop March 2009 38

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### Lessons Learned ... Best Practices for Managing IT Projects

Projects get late...one day at a time!  
If it's not documented, it doesn't exist!  
Micro Management is the #1 Killer of projects.  
If the projects succeeds, the team gets the credit.  
Insist on status reports ... No News is Bad News!  
Don't try to solve "world hunger" when scoping a project.  
Get the Team actively involved ... Leads to commitment!  
One who controls the minutes ... also controls the project!  
Give people responsibility for a deliverable; not an activity!  
Responsibilities are delegated: Commitments are accepted.

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**Lessons Learned ... Best Practices for Managing IT Projects**



Make ground rules known every time; don't assume that people know them.  
 Think as a pessimist, plan for the risks...  
 Act as an optimist, Manage the risks!  
 Management decides to take the risk ... the Project Manager manages the risk.  
 When faced with issues for problem solving, focus on the process first before people.  
 Politics is the ability to influence people with savvy and sensitivity ... Enjoy it!  
 Purpose of Communication is to advance the project towards its completion.  
 PM's job is to help the team member do his/her job better.  
 PM is 100% responsible for success or failure of the project.  
 Make your expectations clearly known to every team member.  
 Don't tell'm how to do their jobs ... help them & challenge them!

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**What's in Your PM Toolkit?**



1. Business Case & Project Charter
2. Project Organization Chart
3. Work Breakdown Structure
4. Dependency Chart & Critical Path
5. Major Milestones, Work Packages, Deliverables & Updated Schedule
6. RACI Chart (Responsibility Matrix)
7. Risk Assessment & Risk Plan (Top 3 Risks)
8. Financial Plan with the Six Measures (TBC, CBC, CAC, CEV, ETC, VAR)
9. Change Order Requests (Most Critical)
10. Status Reports, Issues & Escalations

**Communicate ... Communicate ..... Communicate!**  
*If you are not using these, then what exactly are you using to manage your project?*

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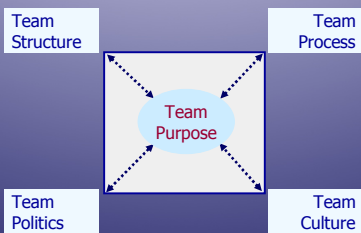
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**People Make Projects Happen!**



**Understanding . . . The Five Pillars of a Team & Ten Golden Rules**

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**Golden Rule #1**

**Assign a PM who is committed to success**

- Credibility and People Skills
- Passion for the project
- Generates Confidence
- Genuinely interested in the Team
- Success Criteria - Outcome vs. Output

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**Golden Rule #2**

**Develop a Project Organization**



- Internal pre-kickoff
- External kickoff
- Vision/purpose/goals
- Inter/intra group dynamics
- Introduce team players
- Project Organization

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**Golden Rule #3**

**Insulate Team from Organizational Politics & Management Issues**

- Client interface responsibility
- Focus on individual deliverables
- Awareness of stakeholder expectations
- Continually sell the project
- Manage internal & external politics
  - Budget, Buy-in, Approvals, Resources
  - Dept. Goals, Priorities, Commitment

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**Managing Project Politics** 

“Having the organizational savvy to get your ideas and recommendations accepted”

Good politics . . . the art of meeting members' needs, solving problems & communicating recommendations . . . to influence project direction towards its intended outcome.

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**Golden Rule #4**

Set Achievable Goals . . .  
Teams Optimize, Individuals Maximize

- Team goals
- Team dynamics
- Individual goals
- Motivational factors
- Team Purpose



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**Golden Rule #5**

Encourage & Facilitate . . .  
. . . Open Communication

- Establish structured communication
- Ensure communication is meaningful
- Help the project move forward
- Exercise authority, responsibility and empowerment
- Formalize delegation, escalation and resolution

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**Golden Rule #6**  
**Institutionalize Positive Mindset**

- Committed team members
- Emphasis on problem resolution
- Facilitate, Mediate, Negotiate
- Consistent Team Processes
- Value differentiation
  - Excellence, Integrity, Learning, Serving
- Unique team "Culture"

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**Is Your Team Empowered?**

Organization or PM Controlled

Team Controlled

Level 1: Goals, Obj. & Processes given

Level 2: Goals given, Objectives developed

Level 3: Direction given; Goals developed

Level 4: Team is Autonomous

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**Golden Rule #7**  
**Practice the Five "R"s**

- Respect
- Recognition
- Rewards
- Rest
- Recreation

Celebrate significant milestones!

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### Golden Rule #8

#### Implement Consistent & Predictable Processes

- Standard Methodologies
- Expectation setting/consequences
- Common processes
- Team Interaction
- Briefing and Debriefing
  - Establish common, consistent goals
  - Conduct "Lessons Learned" reviews
  - Institutionalize process improvement
  - Learning is accelerated ... a process
  - Experience is increased ... an asset

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### Golden Rule #9

#### Transition the Team Graciously

- Project closure
- Project archiving
- Performance feedback
- Acid Test



*"Count me in for your next project!"*

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### Rule #10 – Build Your Team With The Five Pillars



**Team Structure**

- Team Organization
- Team Leadership
- Team Objectives
- Team Building
- Team Dynamics
- Team Influence
- Team Motivation
- Team Optimization

**Team Process**

- Open Communication
- Positive Mindset
- Recognition
- Rewards
- Respect
- Recreation
- Team Transition
- Consistent Process

**Team Politics**

**Team Culture**

**Team Purpose & Vision**

People Make Projects Happen!  
Invest in building and nurturing your Project Team

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### Top Ten Rules

1. Appoint a PM who is committed to success
2. **Develop a Project Organization**
3. Insulate Team from Org. Politics & Mgt. Issues
4. **Set Achievable Goals . . .**  
. . . **Teams Optimize, Individuals Maximize**
5. Encourage & Facilitate Open Communication
6. **Institutionalize Positive Mindset**
7. Practice the Five "R"s starting with Respect
8. **Implement Consistent & Predictable Processes**
9. Transition the Team Graciously
10. **Build your team with The Five Pillars**  
- Vision, Structure, Process, Culture & Politics

Apply the Ten Rules . . . Metrics for Team Building



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### Top Ten Rules for Project Managers

- Respect for Team Members
- Build Trust among team members
- Believe in capabilities
- Challenge the team
- Recognize efforts
- Define Roles/ Responsibility/ Contents
- Establish accountability ... for and towards
- Ensure just treatment
- Build/Encourage personal relationships
- Develop a Team Culture & Values

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### Lessons Learned

#### What's so different about IT projects?

- IT projects are political; Learn to play positive politics
- MS Project ... must be the last thing you do; not the first!
- Know the context ... Methodologies, Buzzwords & Context ... (PMBOK, Prince, ASAP, Agile, Time-boxing, Phases, Processes, Gating, Governance etc.)
- Use iterations/ time-boxing effectively
- Practice visible PM – WBS, Dependency chart, RACI etc.
- Build trust, relationship and confidence with Business PM
- Focus on the client & stakeholders ... be client-oriented; Manage client expectations; Engage the Client
- Manage Risk - Not just tech/dev issues but the overall project
- Develop Soft skills - facilitator, communicator, negotiator , mediator

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**More Lessons Learned**

**What's so different about IT projects?**

- Know the Critical Path – Unexpected (BI-Data extraction; OS migration-HW refresh; ERP projects – management of change; Server consolidation – Application & data inventory; SW development- testing)
- Manage Scope for functionality (Good enough) Vs. Solving world hunger (e.g. Data strategy, Enterprise Architecture)
- Manage project communication ... Using all of the tools effectively; Speak Up – Silence Kills!
- Deal with the Techies - It's not just development (it's one of many components)
- Manage the Team – Focus on overall objectives, structure, process, culture etc.

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**"If you want to build a ship,  
don't drum up the men to  
gather up the wood, divide the  
work and give orders.  
Instead, teach them to yearn  
for the vast and endless sea."  
- Antoine De Saint-Exupery**



**What is your team yearning for?**

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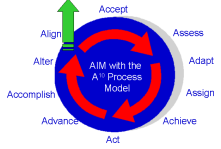
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Additional Resources: Download a checklist for evaluating Project Management and Team Building maturity in your projects at <http://www.d2i.ca> email: [kothari@D2i.Ca](mailto:kothari@D2i.Ca)

From Ratholes to Rainbows

**MANAGING PROJECT RECOVERY**



Dhanu M Kothari  
Romeo Mitchell

**RAINBOWS & Ratholes**

Best practices for managing successful projects

01/the world of project management 02/responsibility without authority 03/where is the rot? 04/getting the baseline right 05/it's out of scope! 06/who's doing what to whom 07/getting to the finish line 08/if it's not documented, it doesn't exist 09/who's on first? 10/uncertainty – the only certainty 11/the cost is the cost is the cost 12/quality is what the client experiences 13/people make projects happen 14/it won't happen if you can't communicate 15/manage your soft skills 16/doing the right thing for your project 17/finish the job with the right tools!

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