PROJECT MANAGEMENT

FOR THE

UNOFFICIAL

PROJECT MANAGER

UPDATED AND REVISED EDITION

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KORY KOGON
AND SUZETTE BLAKEMORE

A FRANKLINCOVEY BOOK

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Introduction: So You're an "Unofficial Project Manager"?

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

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

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

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

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

The *Times* reports that expensive human errors caused a lot of delays. "The telescope's propulsion valves were damaged when engineers used the wrong solvent to clean them. Dozens of screws that fastened the telescope's massive sunshield came loose during vibration tests. And faulty

wiring sent excess voltage into the observatory's transducers." Sounds awful, doesn't it?

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

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

WE ARE ALL PROJECT MANAGERS NOW

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

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

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

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

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

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

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

Although the project management profession has collected a huge body of knowledge on the subject and devised complex computer applications for it, you'll find the basic elements easy to grasp. You don't need to make the job

more complicated than it is. One project management pro explains that if you keep the simple things straight, you'll be okay. He says, "Most complex projects fail because [the managers] forgot the very simple things, not because they couldn't deal with complexity."[5]

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

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

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

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

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

traditionalists. But ironically, even Agile has taken on a lot of complexity.

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

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

WHY THIS BOOK

This book is for those of us who are paid to think, innovate, and create. It's for those of us who are asked to "get 'er done." It's neither a comprehensive textbook nor a reference guide. It teaches you the essentials of managing projects and provides

basic tools in a real-world context. We have taken the complex world of project management and made it simple, clear, and easy to implement immediately. You'll be riding the wave of the new project economy if you learn these skills.

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

WHAT TO EXPECT

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

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

CHAPTER 1

The Job to be Done Now

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

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

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

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

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

As director of regulatory affairs at Lettal Pharmaceuticals in Oslo, Hedda was responsible for getting the firm's new drugs approved. Any new medicine had to be licensed by the authorities before it went on pharmacy shelves, and Lettal's latest creation—a migraine reliever—was stuck somewhere unapproved in the maze of a government agency. Stuck for months—generating no revenue for the organization and relieving no migraines.

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

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

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

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

Hedda figured her job was in free fall.

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

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

She was a project manager.

———

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

Things have changed. Customers want what *they* want. We are seeing more frequent organizational transformations, faster development of new products, quicker adoption of new technologies, and so on. This is a global phenomenon. In other words, we must be nimbler and far more responsive to customers than we used to be. "Doing the old job" isn't enough anymore. Today, to get what they want, customers just look at their phones and say, "Give it to me now." "Fix it now." "Cure my headache now." "You're telling me I can't get my orange squeezer until tomorrow?"

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

And that was Hedda's problem. Up until today, her job, according to the official description, was to "ensure that all

government and organization regulations were met, including complying with industry regulations, both external and internal, developing new policies, and training employees."

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

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

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

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

THE "BIG WHAMMY"

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

"While project management experiences a boom," the experts say, "projects tend to confront, over time, a multiple

'whammy' of time and cost overruns, business-case failures, stakeholder disappointments, and sustainability shortfalls."[8]

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

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

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

WHY PROJECTS FAIL

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

- Unclear outcomes or expectations ("Why are we doing this?")
- Lack of commitment or support from leaders ("Okay, go ahead with it, I guess . . .")

- Unrealistic timelines ("We need this yesterday!")

- Lack of or mismanaged budget ("You need *how much* more money?")

- Competing priorities ("I've got to take care of my other job today.")

- Unrealistic resources ("What could you do with half this budget?")

- Politics ("We can't let Enki's department get the better of us.")

- Lack of a big picture ("A few loose screws can't make that much difference, can they?")

- Poor planning ("Don't overthink it. Let's get started already. We know what to do.")

- Lack of leadership ("Who's in charge here, anyway?")

- Changing standards ("So they want this new car to go forwards *and* backwards?")

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

And there are costs to you, too. People who fail are not happy. Your morale drops, you get disengaged, and your confidence and even your job might be on the line. But this book can give you hope. Unlike the many books on project management that drown you in a dense sea of details, we give you a handful of principles to live by that steer you to success. Principles, said the late Stephen R. Covey, are "rules

or laws that are permanent, unchanging and universal in nature."[9] The principles of successful project management will always work for you, regardless of the process you use or the situation you're in. One professional says, "Whether it's a $50,000 study or a $30 billion 'giga' project, the basic tenets of project management should not change."[10]

TO SUM UP ⌒

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

Check Your Learning

✓ Why is it true that "we are all project managers now"?

✓ Why do nearly two-thirds of all projects fail to meet their goals?

✓ "Whether it's a $50,000 study or a $30 billion 'giga' project, the basic tenets of project management should not change." What is true about this statement?
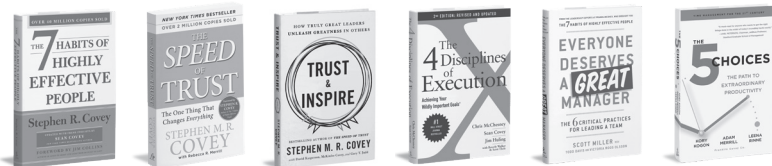
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