

Jeff Oltmann on Mastering Projects

## *Backpacker's Guide to Lightweight Project Management*

### Overwhelmed

**T**he field of project management has been around for decades, and the accumulated technical knowledge often feels overwhelming to newcomers. For example, my favorite introductory project management book gets longer with each new edition and now weighs in at 462 pages. Both academic researchers and practicing project managers add new expertise to the field daily, as they explore new ideas such as Agile Project Management.

In my experience, this formidable body of knowledge intimidates many organizations that are newcomers to formal project management. These newcomers can see the benefits of good project management merely by observing their competitors, but they despair at their ability to adopt an extensive set of project management best practices. They are starting from a very low level of project management maturity. Chaos reigns, and the organizational changes required to implement the full suite of project management techniques are too great. They need a lightweight, simple way to start – a backpacker's approach to project management.

I have helped many clients start project management in organizations that had very little of it. First, let me share six of the lessons I've learned about introducing project management where there is none. Then in the next section, I'll tell you what I load into my lightweight project management backpack.

### Six Lightweight Lessons

#### **1 Project management should be a servant, not a master.**

Project management is merely a tool to accomplish business goals. As one of my clients says, "the proper amount of project management is that which is barely sufficient to successfully accomplish the objectives of the project. Any more than this is gold plating."

#### **2 Start by building a common language.**

People can't work together to improve project management practices until they have a way to talk about it. This includes clearly defining key project roles.

#### **3 Contextualize project management.**

There are no turnkey project management solutions. Base your solutions on the best practices of project management, but customize the techniques and language to fit the specific goals of the unique organization. When backpacking, this typically means favoring simple, low overhead and possibly inelegant techniques above theoretical correctness.

#### **4 Pick your battles carefully.**

Focus on the 80% solution – introducing a small number of project management techniques that will yield the highest immediate benefit to the business. It is much better to help newcomers deeply understand a few powerful techniques than it is to give them surface knowledge of many.

## 5 Everything is about organizational change.

Introducing PM into an organization that doesn't use it is mostly about changing ingrained organizational behaviors. Use excellent change management techniques. Here are a few of my favorites.

- Use participative design and implementation techniques to get widespread buy-in and involvement. Find ways to get users' fingerprints all over the PM solution so they have a sense of ownership.
- Make sure the solution improves everyone's job, so it has staying power. Otherwise, it is just another management fad.
- Design for quick wins. Get at least some immediate and highly visible victories so the organization does not lose interest.
- Build strong and persistent management sponsorship. Dilbert aside, you simply cannot make significant, long-lasting changes without it.

## 6 Technology comes last.

When loading your backpack, spend the majority of your up-front time deciding how the people, process, and organizational aspects of doing projects will work. Software and technology play a supporting role and come later. Bringing specific software in too early threatens to shift focus to the software's capabilities, rather than on how to solve the business problems.

### What Goes in the Backpack

How do you accomplish this? I recommend that organizations new to project management load their new lightweight project management

backpack with three things: a common project framework, a starter toolkit, and rudimentary project governance.

First, define a simple project framework that the organization will use to run multiple projects in a consistent way. This framework contains:

1. Agreement on the key roles related to projects, at a minimum the responsibilities of project leader, project team member, and project sponsor.
2. A project lifecycle - a handful of high-level project phases that provide a memorable structure for everything else to fit into. For example, I often use a sequential project lifecycle that has four phases: define, plan, execute, and close. Embarrassingly simple? That's good.
3. Two or three standard approval points (sometimes called gates) sprinkled throughout the project lifecycle. Each time a project is ready to pass one of these points, the right people must review it and agree that moving forward still makes business sense. Hint: Provide checklists that help project teams prepare for gates, as well as encourage reviewers to ask the right questions.

The second item in the lightweight project management backpack is a starter toolkit. It should contain a *vital few* project management tools that will have a very high impact. Include:

1. A flowchart of steps for project teams to follow when running a project. Keep it simple and put it on a poster.
2. Templates, checklists, and examples that people working on projects can use. Write them in simple language

that is free of project management jargon. This helps part-time, “accidental” project managers. Start small, and add over time. The table below shows the foundational tools that I put in a small starter toolkit:

Project Phase	“How-to” templates, instructions, and examples
Define	<ul style="list-style-type: none"> <li>Define the project’s business value and expected deliverables</li> <li>Identify the key stakeholders and decide how to work with them</li> </ul>
Plan	<ul style="list-style-type: none"> <li>Create a schedule</li> <li>Identify and manage risks</li> </ul>
Execute	<ul style="list-style-type: none"> <li>Monitor progress</li> <li>Make steering decisions</li> </ul>
Close	<ul style="list-style-type: none"> <li>Transition the project’s output to users</li> <li>Learn lessons so future projects will be better</li> </ul>

The final item in the backpack is rudimentary project governance. This is a fancy term for how the new project management system will be managed. Governance systems can be quite sophisticated, but most backpackers benefit from very simple governance.

Therefore, concentrate on establishing a forum and protocol for

- Regular reporting to management on progress of all projects
- Project reviews and gate approvals
- Escalation of issues that projects will inevitably encounter

## Endpoint

A wealth of PM knowledge and techniques is available – something to fit nearly every situation. Although it is a great resource for experienced project managers and teams, the sheer quantity of best practices scares away many low-maturity organizations that would like to reap the benefits of better project management. These newcomers should start with a lightweight backpacker’s approach to project management – a “barely sufficient” project framework, toolkit, and governance.

## Further Information

An example flowchart and tools are on the Resources tab at [www.spspro.com](http://www.spspro.com). Some of the ideas in this article first appeared in a more detailed paper that I wrote for the 2009 Global Congress of the Project Management Institute. You can read that paper at [http://www.spspro.com/SPS\\_cases\\_papers.htm](http://www.spspro.com/SPS_cases_papers.htm)

## About the Author

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## Project Success Factors

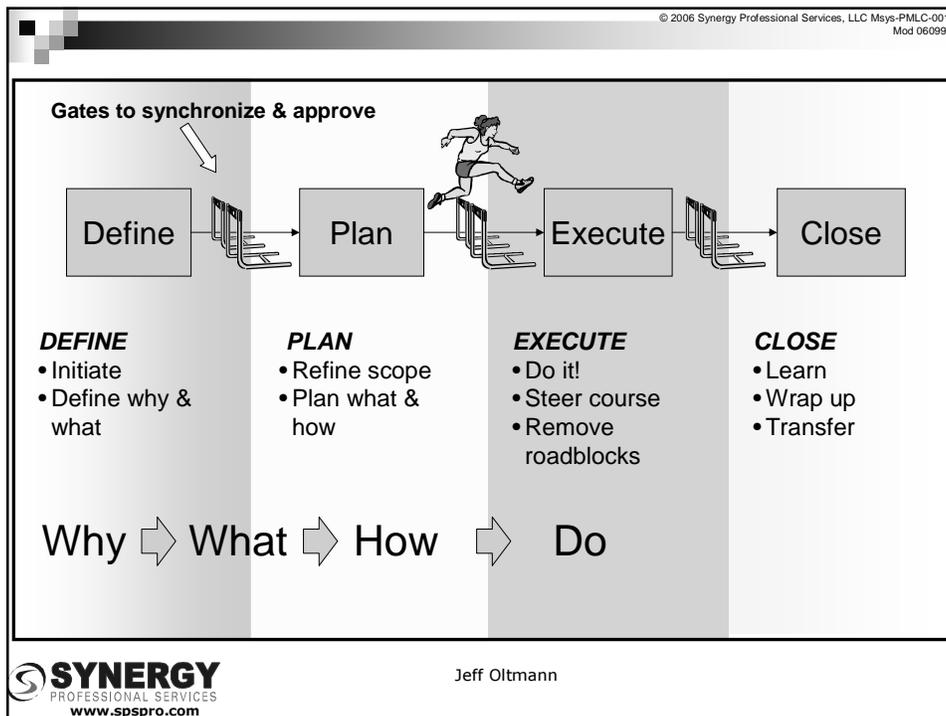
1. Agreement on goals
2. A good plan
3. Progress measurement
4. Constant communications
5. Management support
6. Controlled scope
7. Continuous contact with customer



Eric Verzuh  
J. Davidson Frame



Jeff Oltmann



### Example: Contents of SiTech’s On-line PM Toolkit

<p><i>General</i></p> <ol style="list-style-type: none"> <li>1. Overview of SiTech’s PM process</li> <li>2. Flowchart of steps for running a project</li> <li>3. Exit checklists for all four phases</li> <li>4. Instructions and forms for all gate approvals</li> </ol> <p><i>Define phase</i></p> <ol style="list-style-type: none"> <li>5. Charter tool*</li> <li>6. Definition refinement tool</li> </ol> <p><i>Plan phase</i></p> <ol style="list-style-type: none"> <li>7. Requirements management tool</li> <li>8. Stakeholder management tool</li> <li>9. Risk planning tool</li> <li>10. Work breakdown tool</li> <li>11. Schedule creation and tracking tool</li> </ol>	<p><i>Execute phase</i></p> <ol style="list-style-type: none"> <li>12. Progress reporting tool</li> <li>13. Management dashboard for tracking portfolio of projects</li> <li>14. Change request tool</li> <li>15. Issue and action item tool</li> <li>16. Checklists for hand over to operations</li> </ol> <p><i>Close phase</i></p> <ol style="list-style-type: none"> <li>17. Retrospective tool</li> <li>18. Archiving instructions</li> </ol> <p>* All tools include templates, instructions and completed examples</p>
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### Lessons Learned at SiTech

1. Project management will always be secondary to operations.
2. Start by building a common language.
3. Contextualize project management.
4. Pick battles carefully.
5. Everything is about organizational change.
6. The system is more important than its parts.
7. Technology comes last.
8. Strong and long-lasting executive sponsorship is required.



Targets

May be revised during further scoping and planning

**Key targets**

Desired start date:

Desired completion date:

Estimated cost:

Other:

**Major risks**

**Key assumptions and constraints**

**Major roles and authority**

Role	Name	Major responsibilities
Project manager		
Sponsor		

**Approval to proceed to next phase**

Project manager:

Sponsor:

Funder:

Other:

## Instructions for Completing the Charter

### ***Purpose and Responsibilities***

- This form is used during the define phase of a project to get initial alignment and agreement on why the project is being initiated and what it will produce.
- The sponsor and the project manager should work together to get this charter form filled out. Involve as much of the core project team as possible to get their buy-in.
- The charter is not a replacement for a project plan. Keep it at a higher level of detail; just detailed enough to make a decision at the next gate on whether it is worth investing in detailed planning for the project.
- The completed form should be no longer than 2 – 3 pages. The entire define phase should be short, such as several weeks for many projects at a typical company.

### ***Step-by-Step Instructions***

#### **Short Description**

Enter a brief description of the project so that other people can recognize it quickly. This is just an identification tag, so don't make it too fancy.

#### **Business Alignment**

In this section, describe the why of the project. Explain the business level costs and benefits that your company will get from this project. Why is this project important and how does it link to your company's business objectives?

#### **Deliverables and Success Measures**

In this section, describe the what of the project.

- What are the tangible deliverables that the project will deliver to its customers or users?
- How will you measure whether the project successfully delivered them?
- Use the SMART test. Are the deliverables and success measures Specific, Measurable, Actionable, Realistic, and Time-bound?
- In the *out of scope* section write a short list of things that you don't plan to deliver but that other people might be expecting, based on likely misunderstandings.

#### **Key Targets**

These are order of magnitude estimates, since you are filling out this form during the *define* phase, before any detailed planning has been done for the project. These are not commitments.

# Risk Assessment

**Project name:**  
**Project manager:**  
**Date:**

## ***Identify and Prioritize Risks***

Identify risks to the successful completion of your project. Prioritize the risks by plotting each one on this Probability-Impact (PI) Matrix

