

5 Step Project Methodology

1 Broadbrush Plan

4 Team Assignments

3 Dynamic Scheduling

2 Work Breakdown Structure

5 Tracking & Status

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Overview of the 5 Step ADPM™ methodology

This book is titled the "Essentials of Project Management" and it's just that. We're going to take you through a five step process for planning projects, developing a work breakdown structure, building a dynamic schedule, assigning people to tasks and tracking results.

There are many things this book will not teach you. We won't deal with the statistics of risk or the alternative ways to develop work estimates or the cost accounting required for project budgets. You'll learn the essence of project management but not all of the detailed information in the Project Management Body of Knowledge (PMBOK™). This book is intended for people running smaller projects with most of the project team coming from their own work unit.

We'll also use project management software in a very straightforward, simple way. This book has many illustrations of applying this simple methodology in Microsoft Project®. Using project management software with this simple methodology is a big time saver so we recommend that approach. Our objective is not to spend a lot of time in the software. The methodology is designed for you to spend an hour or two developing the plan and then 10 or 15 minutes a week using the software to update it. You'll spend the rest of your time managing the project.

In sum, *Essentials of Project Management* addresses first level project management tools. It's appropriate for smaller projects and teams with few cross-functional resources whose business purpose has a tactical focus. Our more advanced publications like *Managing Information Technology Projects*, *Managing Healthcare Projects*, *Managing Cross-functional Projects* and *Managing Engineering & Construction Projects* address more complex projects.

5-step AdPM™ Process

The 5 steps in our process are listed in the following in order on the chart on the next page along with the 12 best practices techniques you will learn. We're going to take you through a five step process for planning projects, developing a work breakdown structure, building a dynamic schedule, assigning people to tasks and tracking results. Those steps are the core of the AdPM™ or Achievement-driven Project Management. As we move through those five steps, you'll learn 12 best practices techniques for delivering projects on time. We'll go through a process of working with your boss, user or customer (we'll call this person the project sponsor) and other interested parties who will be affected by your project (we'll call them project stakeholders). The 12 best practices techniques you'll learn are:

1. *Definng the Project Scope As a Measured Business Result*



Key Outputs from the 5-step AdPM™ Process

Broadbrush Project Plan - 1½ page Document for Project Initiation

The AdPM™ Broadbrush Plan is a concise 1½ page plan that allows executives to make decisions and exercise strategic control over projects and the business value they produce. It also provides them with hard-edged metrics for measuring performance and the quality of deliverables.

Work Breakdown Structure Decomposition - Crystal-clear Accountability & Scope Control

Rather than creating mindless "to do" lists, project managers, or PMs, craft AdPM™ work breakdown structures by decomposing the scope into a high-level achievement network of measurable results that become peoples' accountabilities. Every team member's assignment is in the form of a measurable business outcome. The resulting WBS is compact so PMs can update it quickly but each entry is supported by a work package that makes everything clear so nothing is missed. Both the PM and executives have unambiguous checkpoints to measure progress.

Dynamic Project Scheduling - Update Schedules in 10 Minutes a Week

PMs use dynamic AdPM™ project scheduling techniques that let them update plans in minutes each week and quickly model alternatives for managers to cut duration, lower budgets and adjust the business value a project produces. These techniques give executives the hard data they need for decision-making and consideration of alternatives.

Status Reporting that Spots Problems Early - Clear Checkpoints to Identify Problems Early

With AdPM™ tracking, PMs and sponsors have hard-edged checkpoints to measure progress. They can anticipate problems and implement corrective action early when it costs the least. PMs make concise status reports on projects and always offer a range of alternatives for executives to consider.

Step One: Broadbrush Project Plan

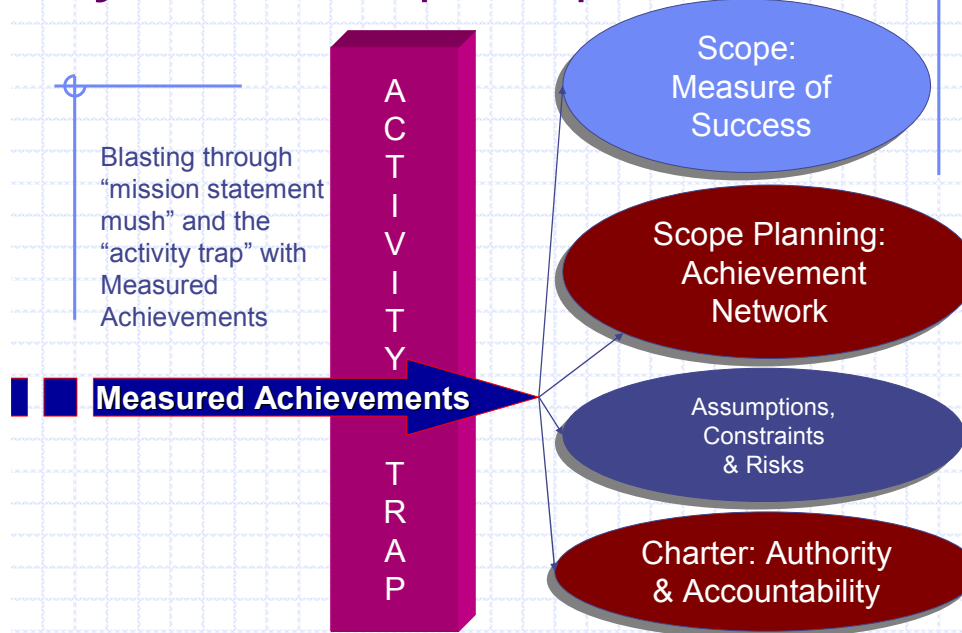
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Step One: Broadbrush Project Plan

We start our project management work by defining the scope of the project with the sponsor. That is, we define the business objective the project sponsor wants. When we set about defining the scope during project planning there are a number of traps to avoid. One trap is thinking about what we have to do rather than the project's "end results." Thinking about the activities we need to complete is much easier than thinking about the business outcome the project should produce. This is the activity trap where we become consumed with detailing all the "To Do's" in the project. Sometimes we get so consumed with those delicious details that we lose sight of the business purpose. In the activity trap, a project manager (PM) receives a project assignment, thinks about the first thing that has to be done and starts work, figuring that they'll think about the next step when they come to it.

Project Plan: Scope/Requirements



through those conflicts before we start work rather than discovering them when we are almost done. Unfortunately, the activity trap snares so many PMs that it is one of the two leading causes of project failure. The activity trap wastes resources and frustrates project team members with continuously changing assignments. The lure of the activity trap, that bottomless pit, has ruined countless projects.

Top Down Project Planning

Broadbrush Project Plan

1. Scope: Measure of Success (MOS™)
2. High-level Achievements (HLA™)
3. Charter
 - Assumptions & Constraints
 - Risks
 - PM Authority
 - Change Control
 - "Rough-cut" Resource Requirements

This is a 1-2 page strategic decision-making document used to initiate the project

We'll avoid the activity trap with a 1-2 page document, called the Broadbrush plan which covers the big-picture decisions that are required before we can start our project. When the project sponsor and stakeholders approve the Broadbrush plan, the Initiation phase of the project is complete. The key to this process is to avoid those delicious technical details that quickly drag us into the "activity trap." Our focus during a Broadbrush planning process is to provide the sponsor with the opportunity to make decisions about the end results the project will produce. Our focus is on the measured business-relevant outcomes not the details of how we will achieve them. We also want to secure the project executive's decisions on cross-functional authority that support the way we'll manage the project team. We keep the document short and high-level so we engage the executive's attention. We can develop long formal plans or contracts later when the strategy is approved.

A Broadbrush project plan is never long but requires thought, decisions and agreement on three things:

The measure of project success (MOS™) - an

unambiguous measurement of the project's outcome. For example "Answer 90% of our customers' inquiries in 120 seconds or less with no more than 5% callbacks on the same problem. (Scope)

A High-level Achievement Network (HLA™) - a hierarchical network of measured achievements that leads to the MOS™. (Requirements)

Project Charter – a short narrative covering risks, assumptions, constraints, resource requirements, change control, and PM authority.

Collectively, these elements define our project scope, requirements and charter. Your organization may also require other narrative documents but the above elements are critical for controlling projects and achieving success. They are the strategic foundation for a project.

Technique #1 Scope & Measure of Success

We need to drive projects from one, quantifiable MOST™ (measure of success). Driving a project plan from the success measures keeps the focus where it should be; on achieving the end result. By working with the sponsor to define success before the project starts, the PM is in a much better position to control the project.

Scope: Measure of Success

An objectively verifiable business outcome

- ◆ Clarity on what the sponsor wants
- ◆ Scope change control
 - Clarifies what is included in the project
 - What is excluded because it's not necessary
- ◆ Clear team performance expectations

As an example of a project situation that will be familiar, let's say your sponsor, the Director of Human Resources for a medium sized company, assigns you a project by saying, "Our personnel records are out-of-date. Employees are getting cursory quarterly performance reviews, if they get them at all. I want you to straighten out that whole mess so when a line manager calls we can find up-to-date employee personnel records on the system and quickly give them the data they want. And we want the employee reviews to have solid, detailed feedback on their performance. You can use anyone you need to get this done. This is a high priority. You'll probably have to involve five or six people from your group, some line managers and someone from IT so we get a lot of good input. Decide on how to organize the files and what standards the performance reviews should meet. A good place to start is probably by updating all the records. Then maybe you can draft a memo, for my signature, telling managers that they have to do performance reviews on time and give their people really good

feedback on their performance and developmental needs. Get the team put together and we will figure out the rest of the project from there."

The sponsor has given you a lot of information about this project and what you're supposed to do. It would be very easy to start work on the files and draft that memo. However, all of the information is in the form of activities. The sponsor hasn't told you what end result he or she wants. To succeed with this project, we have to know how the sponsor is going to measure the success of the project when it's done. That definition gives us a tool to control the scope of the project and decide what should not be included in the project.

So, we have to ask the sponsor some questions to get at the business purpose of the “laundry list” of changes that we heard about. We might start by asking, “After the files are up to date and managers are doing thorough performance reviews on time for all the employees what will that do for us?”

The sponsor may answer, “We’ll be on top of things!”

You sense the sponsor is getting just a little bit angry with the questions but you press on because if you don’t find out what problem the sponsor wants to solve and how they will measure success, you have almost no chance of delivering it. So you continue.

“If I know exactly what end result you want, then I can do a good job and give you exactly what you want. Three months after we finish this project, what will be different, what will you expect to see?”

“Okay,” the sponsor answers and then pauses for a moment to think. “Three months after the project’s done, I won’t have managers complaining to me about how we don’t know what’s going on and how it takes forever to get information from us.”

The sponsor is talking about end results instead of activities so we know we’re on the right track. Now we have to make these end results measurable.

You ask, “So if I understand what you want, the employee records have to be current. How current? Would five days be good enough?” The sponsor thinks for a moment and says, “No, we can do better than that. Let’s say the personnel system is never more than 3 days behind.”

You make a note and then ask, “With the records current to within 3 days, how fast do we have to answer a line manager’s questions?”

“That’s a hard one,” the sponsor says, frowning in thought. “Some complex data requests will take time; a day or two, others just a few seconds.”

“Well, how about we set the goal at 80% of the requests are answered in 10 minutes or less?”

The sponsor grins and says, “How about 95%?”

You smile back and say, “It might take a lot longer to get that close to perfection. What percentage are we answering within 10 minutes now?”

The sponsor frowns again and says, “About 1%. Let’s go with 80%, that’ll be a great improvement.”

What we’ve done in this planning session is to get agreement on the scope of the project. We now have an unambiguous measure of project success (MOS)™ with which to drive the planning and we have quantified the sponsor’s expectations for the project. We’ve also given ourselves a tool for controlling changes to the scope of the project. When we were talking about objectives

like “straightening up the records” and “being on top of things” it’s very hard to decide what is and what is not a change in the scope. With a measurable achievement to quantify our scope, controlling scope creep is much easier.

Activity Trap

Activity Trap: Project Death Spiral

We focusing only on what to do next...
not the outcomes we want at the end

- ◆ Activities are so easy to list, that we think are making progress
- ◆ A sound project plan is not a list of attractive features or good ideas

We avoided the activity trap in the discussion with the sponsor, but it is such an obstacle to project success that we should go into it in a bit more detail. The deadly lure of the activity trap defeats most efforts to clarify the scope of projects. This is the point at which a Project Manager (PM) and the project executive can fall into the activity trap. The executive or user has told you what’s wanted, usually has a few ideas about features and the first several steps and says, “It’s time to get going on that project plan.” If we let activities rather than measurable business successes drive the project, we fall headfirst into the activity trap.

Everyone has a list of good ideas and activities that we could translate into a project plan, making it a long "To Do" list. We can hope that these activities improve performance and hope the result satisfies the sponsor. But there's entirely too much hoping in this approach. In the activity trap, the project manager has no way to measure when the tasks are successfully completed. How does the PM decide what tasks to include or how much to

invest in each of them? Politics and power alone will determine what’s in the project and it will forever be a moving target.

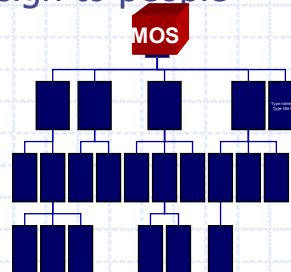
The main problem is that none of these activities are linked to a definition or measure of success. Because the PM never asked the executive to define success, the PM is in a situation where success will be defined as the project progresses or at its conclusion. Worse, the definition of success will be a moving target and people will change it to move the effort in directions they favor.

The project manager and the executives have fallen into the “activity trap,” adding activities they want rather than driving the project plan from the measures of success. They buried themselves in the minutia of tasks rather than focusing on the end result. They added tasks to the plan because they sounded good or have been used before. This project plan also has some “hidden” and potentially dangerous assumptions. Someone, somewhere, has a business problem in mind that the project will fix.

Technique #2 Requirements & High-level Achievement Network

Scope Planning: Achievement Network

- ◆ Decompose MOS™ into requirements
- ◆ Transform Activities into measured results
- ◆ The chain of these high-level achievements leads from where we are to the MOS™
- ◆ Then decompose the HLA™'s into smaller achievements which we will assign to people
- ◆ Every entry in the network is a measured achievement



thinking it through, develop some requirements ideas and then show them to the team. To reach the project's MOS™, "80% of the info requests answered in 10 minutes," the sponsor gave us a few ideas.

The records have to be current within 3 days of personnel actions

Managers have to turn their quarterly reviews in on time

The reviews have to be better, more thorough

HR staff has to know how to answer inquiries in the system efficiently.

With these ideas in mind, we might start talking to a number of other people, including line managers, HR staff and the IT department, to flesh out the ideas. Each of these discussions starts with the PM acquainting everybody with the measure of success. These discussions are another opportunity to dive head-first into the activity trap and all those delicious ideas. The PM keeps the

The MOS™ is not the last measured achievement we'll develop, but it is the most important and the most difficult to conceive. With the sponsor's approval of the MOS™, the project manager can begin decomposing it into a high-level achievement network that will be the project's major supporting achievements. This "spine" of achievements leads to the MOS™. The high-level achievements are not activities; they are also measured business results. We don't think about how we're going to do the work, we simply identify the major measured results which will carry us from where we are now to the measure of success.

Let's continue with our example and see how a project manager handles the development of the high-level achievements, using the measure of project success the sponsor has approved.

Sometimes, we'll sit down and lay out the requirements for a project ourselves. Other times, we'll involve the project team in the process. Let's start by