



# Project Management Newsletter

Industry

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## Red Projects

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### The Newsletter

This issue continues the discussion of Red Project recovery with a look at the basic processes and functions that must be in place for the project to run. Although this seems like such a trivial subject, all to often a majority of these items are missing and are the initial processes to be implemented to fix the project.

The second topic will focus on management technique and discuss complex management structures - multiple project managers working on parallel and interdependent projects.

### Next Issue

#### Discussion Topic:

Red Project Management Part 3: The Project Manager as a Lobbyist. Part three will cover some techniques for the Project Manager in communicating change and working with executives in modeling the new direction for the project.

#### Tools:

Scope Creep. This article will be a case study in Scope Creep and how it can be represented to executives in a graphic format.

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[newsletter@ecaminc.com](mailto:newsletter@ecaminc.com).

Red Projects are projects that are either significantly behind schedule, over budget or both. This is part two of a four part series on Red Projects that discusses the common problems to look for in the project. February's edition of the *eCameron Project Management News-*

*letter* discussed the most common reason for projects to go off track – poor communication. A major step in correcting this problem is to get back to the basics of project management – meeting minutes, change management, risk assessment and schedule.

## Part 2: Back to the Basics

The first step in fixing a project is to perform an audit. It must be determined that the core processes are in place and being followed to provide the foundation for the project. There are many procedures that are required to run a project correctly, but experience shows that a few commonly missing processes are major contributors to project failure. These items are meeting minutes, change management processes, risk register and a sensible schedule. To simply have the templates or procedures on file is not enough, the audit must be thorough and ascertain that they are actually being used. It must be determined, for instance, that meeting minutes are being published for all meetings and the meeting attendees are reading and correcting the minutes. The audit must analyze risk and mitigation plans and ensure they are current and the mitigations are effective. Each of the processes must be evaluated for their efficacy and corrections made where needed.

Processes that are missing or ineffective must be corrected. Without this solid foundation it will be impossible to determine other issues that are impacting the project performance. The Project Manager must be able to explain why processes were missing or not properly functioning, the steps to correct the problem and an assurance that it will not revert to the "old ways". To be sure, it is part of the Project Manager's job to implement and monitor these core processes. To this point, though, the Project Manager has not successfully identified the reasons contributing to project failure. For this reason, it is sometimes sensible to bring in an outside consultant to

perform the audit. Part 4 in this series will discuss this in more detail.

The fundamental processes to be audited are: meeting minutes, change management, risks register and schedule. The order of precedence is important – it is the immediacy in which they can be implemented. Ultimately the schedule may be the most important, and surely is in the eyes of the customer and management, but a useful schedule requires meetings, a solid understanding of scope and risks and assumptions prior to being developed. After understanding these items the schedule may be built. No schedule at all is better than a misleading schedule.

### Meeting Minutes

Meeting Minutes are the easiest process to implement. Unfortunately the resistance from the team to perform the task is usually very high and difficult to overcome. The adherence to this process will require the utmost vigilance of the Project Manager.

After developing a Meeting Minutes template, a log and educating people on their function, the Project Manager needs to enforce the process and lead by example. Every meeting needs an agenda and minutes - no exception. In addition, the Project Manager must also implement a process that provides him or her with visibility of every meeting so they can ensure minutes are published. When they are not published, the Project Manager has to hold the meeting organizer accountable.

Good minutes are difficult to write. No one likes the added work and they do not see an immediate benefit. It will

take about two months before memories have waned and published minutes are needed. It will happen. Few things are more satisfying than to have the work pay off with "According to the minutes..."

Some points to keep in mind on minutes

- All meeting minutes must have action items (with responsibility and due date assigned), a general discussion section and conclusions.
- All meeting attendees need to understand that if they do not agree with the minutes they have one week to challenge or amend them. They need to understand that the minutes will be considered the plan of record.
- Team members should take minutes for meetings they attend or organize. Since it is hard to get the customer or management to take minutes on meetings, a team member should be "volunteered" to do the task. The benefit is that the minute taker includes items that are meaningful to them. Hence minutes written by the team will have more information that is pertinent to the team. Often proofing someone else's minutes does not catch the items that were missed. An administrative assistant that is not intimately aware of the subtleties of the project should *not* take the minutes. This attempt to reduce workload on team members, or the Project Manager, will produce minutes that omit the fine points of what was said. This is a common failure of minutes.
- Minutes refresh the meeting in the eye of the author. If the project team writes the minutes, they will be more in touch with the real results or where the meeting may have missed a point.
- The description section of the minutes should summarize all points mentioned in the meeting – not only the conclusions of the meeting should be captured. The minutes serve as an historical record of the objections and rebuttals. It should reference any discussion resulting in an Action Item, debate prior to a conclusion and comments to the agenda of the next meeting.
- The Project Manager should be copied on and READ all minutes. The slightest change of scope or commitment should be challenged. This is the place where the Project Manager can stay on top of subtle scope changes by the customer and management.

#### **Benefits of Minutes**

- Improves the organization and control of meetings.
- Provides a written record of discussion and agreements
- Documents action items, due dates and responsibilities.
- Sets goals for subsequent meetings.

#### **Change Management**

Implementing a change management process, or following an existing, is one of the hardest jobs in a project. Prior to attempting the implementation, the Project Manager must enlist the support of every person in the escalation path. This

cannot be a passing "We are going to implement a change control process, will you support it?" Of course, the answer will be "Yes". Upper management must understand the process as well as the effect of implementing the process on the project. When there is agreement on the process, publish minutes on these meetings confirming their support and understanding of the process and their responsibilities.

There will be a struggle as people are introduced to the change management process. Change requests will be met with:

- "We don't need this, it has never been done before." (At least on this project.)
- "This has to be in scope, the system won't work without it." (A variant: "It is a bug in the requirements.")
- "This is a small change; we don't need all this paperwork."
- "This could never cost that much!" (Variant: "This could be done with an **IF** statement and a **DO** loop.")

As change requests, and their associated impact, are reviewed, the people that must approve them will realize the change will affect one or more of the following: the budget (internal cost), the "real" cost (generation of a Purchase Order), the project schedule and individual performance appraisals. The latter may provide for some contentious situations.

As people start to challenge change requests, upper management needs to have their role reaffirmed – supporting the Project Manager in ensuring the cost and schedule impacts are properly accounted for. When objections increase on a Change Request, management will need to be apprised of the potential issues and the financial impact. Significant skill and tenacity will be required from the Project Manager to maintain management support. Lack of management support may be a significant part of the reason the project is in trouble. Initially, the Project Manager cannot let any change requests go unaccounted for. The precedent of lax change management, especially while recovering a failing project, sets the stage for continual arguments about the process and a high probability of continued failure.

Implementing a change management process may highlight other issues in the project. If implementation of a change management process generates a series of change requests, it often shows that the requirements were not properly defined. This has a tendency to point at the business analyst and the customer. This can make for a very defensive situation, especially if the customer wants to place all the blame on the project team. The customer will attempt to shift their failures to the business analyst (who, indeed, may bear some of the responsibility), but a business analyst will rarely know the customer's needs better than the customer, hence they rarely hold all the blame. The customer is surely going to own a major part of the poor definition of the system. The Project Manager needs to pay special attention if accusations are made and must be very objective in assigning any fault. Regardless, senior management needs to be prepared and ready for the reaction.

Next to communication, scope creep and poor definition are the major causes of project problems. If either is an issue,

change request processes will not necessarily stop them, but it will surely bring them into the spotlight.

### **Benefits of Change Management**

- Controls deviation from scope.
- Identifies poorly defined components.
- Retroactively captures scope creep to identify problems with the project.
- Identify financial concerns from scope creep.

### **Risk Register**

If risk register does not exist, it must be created. If it exists it must be refreshed. The risk register consists of: (1) the risk, (2) probability of occurrence, (3) the financial and schedule impact, (4) related risk, and (5) mitigation plans. The core team needs to be involved and take this task seriously. The steps to follow are list below.

- Whether a list exists or not, a brainstorming session is the best method of gleaning them. The key team members should be assembled and risks and assumptions written down. At this point in time perceived risk validity of either should not be questioned. They should be well understood along with their impact. Any linkage between risks should be highlighted. Mitigation plans for each risk should be outlined.
- If a list already exists, the results should be compared to the list generated above. Omissions, additions and any risks that have fired should be noted. Remove the risks that have a low probability of occurrence **and** an insignificant impact. Any risk with a probability of occurrence greater than 60% should be incorporated into the plan and schedule.
- In a meeting with key management and the customer, publish the list with an assessment of the impact. Prior to publication, make sure that key stakeholders are aware of the findings. Any risks that have fired and the mitigation taken should be reported on. Although everyone understands that risks will affect the project, few are willing to accept the result of more cost and schedule slides. The Project Manager will be required to hone their lobbying skills prior to publishing this list.

There are immediate benefits for the team. First, the team gets together and reviews and amends the list. This is a great opportunity to reinforce that communication and teamwork is the new order.

The second benefit is the ability to see what the burning issues are at this point in time. The team will be quick to point out that some items were not planned on, are out of scope or the mitigation was not executed or appropriate. It is quite possible that problems enumerated here can go a long way in fixing the project.

Lastly, it provides a checkpoint so when a risk fires the team knows the potential mitigation plans and are more prepared. Discussing the risk often changes behavior and will reduce the chance of occurrence or minimize its impact.

When reviewing the risk register it may become apparent that some risk has fired and, through the project compensat-

ing for it, scope has changed. Any changes to scope need a Change Request to note the historical deviation from scope and account for the financial impact.

Risks and their attributes are not static. These lists must be periodically reviewed, refreshed and published. Any major changes to the lists should be discussed with management and the customer.

### **Benefits of a Risk Register**

- Highlights risk to the entire team.
- Enumerates mitigation plans.
- Identifies existing scope creep.
- Identifies potential schedule modifications
- Calculates risk contingency budget

### **Schedule**

Last, but surely not least, is the schedule. The Project Manager needs to start with the most basic of schedules - the milestones - and work back to a detailed schedule. Schedules are very unique to each project. Beyond design, develop, test and deploy (in an IT software project), few things will be in common. But there are a few attributes of a schedules use that must be present:

- The schedule must be built and agreed to by the team and any dependant parties (vendors, other groups and the customer). The team must trust and believe in the schedule. Too often the team will leave this to the Project Manager. This concept is the farthest from the reality. Only the team members know the details of the system. The Project Manager can keep them in check but cannot develop the schedule in a vacuum.
- The Project Manager must hold people accountable for meeting their part of the schedule. Once the schedule is complete, the Project Manager must ensure the team and any dependant parties make their commitments. This is the reason everyone was part of building the schedule, they said they could do it in the timeframe noted.
- The schedule must be reported on to all stakeholders - team, management and the customer. The schedule is not just for the Project Manager to task his or her team. It is a reporting tool to the management and the customer – the good, the bad and the recovery plans for missed deadlines. This, above all, will build more confidence in the Project Manager.
- Some schedules are not possible. Regardless of the money and people thrown at them, the milestones may not be

eCameron, Inc. has significant experience managing and correcting projects that have run into trouble. This gives us the ability to assist companies in averting the problems at the beginning of a project and correcting projects that are not meeting their goals. For more information please contact:

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achievable. Preparing scope changes, phased deliveries and moving a milestone may be required to create a sensible schedule. These are not positive events and will take significant skill to prepare, but presenting a non-realistic

#### **Benefits of a Schedule**

- Monitors and tracks project progress.
- Enumerates dependencies.
- Reports on conformance to schedule.
- Provides resource utilization and allocation.
- Emphasizes Change Request impact on schedule.
- Helps calculate the cost of project and delays.

schedule is not an option.

In conjunction with this process the Project Manager needs to go on the offensive with the stakeholders and the team. He or she must become a premiere lobbyist – a person to promote the project and the team. Therefore, the next installment, Part Three, in this series will discuss the active communication that a Project Manager must do in order to promote to management, the customer and the team the success in correcting problems.

To assist in implementing these techniques, one will find templates and procedures available on eCameron's website at: <http://www.ecaminc.com/Templates/Templates.html>.

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## **Technique: Complex Management Structures**

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Some business models use a complex management structure with multiple Project Managers and no central or program management. This structure requires significantly more coordination and communication between project management members than in traditional management structures. This structure is low overhead and can be very cost effective.

This discussion centers on difficulties in a project structure where multiple Project Managers handle various departments' input for the overall program. The goal is to understand the traps one may fall into and some techniques to use to overcome them.

Clearly defined and understood roles for all managers is the most important factor to make this structure work. This is the same as the roles and responsibilities within any one of the project teams, but is directed at coordinating the management teams. Without a clear understanding of roles and responsibilities, the group will lose effectiveness by relegating members to assumed roles and can result in: (1) Project Managers with little responsibility or authority, (2) responsibilities wrongly assumed by others, (3) approval for given elements of the system without full acceptance of the truly responsible party, and (4) a component missing significant functionality.

In the absence of written delineation of roles and responsibilities, one of the management team members should press for resolution. Unfortunately, without roles and responsibilities no one may raise the issue. In such situations the Project Manager that assumes the task should proceed with caution first apprising their supervisor with the concern and then raising the concern with other management team members. Initial conversation with peers might determine they have the same concern; their input will be valuable. Regardless a solution must be proposed and approved by the group.

Two of the subtle ways for the roles to become hazy and ill defined are through stereotyping or assumption of roles from prior projects.

Stereotyping (or the worse form, prejudice) would be where others assign a team member a de facto role based on title, job function, gender, demeanor, etc. Examples include:

- A mild mannered team member in the midst of other aggressive members. Even though the intentions of the team are not to overpower the individual, the unintended result may be to overlook the responsibility of the less aggressive individual.
- Gender bias can happen in both directions, women treated as administrative assistants or men placed in (as opposed to assuming) overly domineering roles. Both can result in serious lack of communication through marginalizing certain team members.
- Organizational stereotypes. A frequent situation is an IT organization designing a system under the premise that they know the requirements of the user better than the user. The scenario is founded on the basis that the user community is "IT illiterate", alienating the representatives from that group.

The assumption of duties from prior roles may be more common and certainly more innocent. In these cases, people who have been in a role of authority are now in a situation of sharing the authority with others. If that person has been in the authoritarian role for a significant length of time, this can be a difficult attribute for them to change.

Lack of charter can also produce the situation where a team member may think they have authority or responsibility for a given domain/organization when in fact they are only in an advisory role. In this case, one can conclude that it is management's view that the organization is not critical in the overall project. This puts the person in an extremely difficult position of being responsible for input but having no authority over the outcome.

The suggestion for a Project Manager in these situations is to become more assertive and propose solutions to fill the gaps. Some of these solutions are:

- Propose a charter. Draft a program charter with the key player's roles and responsibilities defined and propose it to the management team for clarification. Such a document can identify others that are equally unclear on their role and can quickly clarify the situation.

- Do not act in ambiguous roles - be the role of the Project Manager. Require that all Project Managers generate meeting agenda, book meeting rooms, publish minutes, turn in status reports, etc. The "nice manager" that does everyone's grunt work will only exacerbate any role misconception or stereotyping.
- Become involved. Determine the business meetings, design reviews, testing processes, etc. that affect the group and attend those meetings. Insure the attendees for future meetings are appropriate and make corrections as necessary.
- Assert the position's responsibility. Assert the role and position by simply becoming more vocal about the roles and responsibilities.
- Assume authority. If there is implied authority, take it. This "bull in the china closet" approach only works in the right environment. This can shock and offend others and can result in confrontation. One's supervisor should be in agreement that this approach is appropriate. As such, it should be used as a last resort.

## Resistance to Change

*"The only sensible thing was to adapt oneself to existing conditions. Even if it were possible to alter a detail for the better here or there – but it was simple madness to think of it – any benefit arising from that would profit clients in the future only, while one's own interests would be immeasurably injured by attracting the attention of the ever-vengeful officials." -- The Trail, Franz Kafka, Muir translation 1954.*

*"The only proper approach is to learn to accept existing conditions. Even if it were possible to improve specific details – which, however, is merely an absurd superstition – one would have at best achieved something for future cases, while in the process damaging oneself immediately by having attracted the attention of an always vengeful bureaucracy." -- The Trail, Franz Kafka, Breon Mitchell translation 1998*

There is nothing new to be encountered when attempting to change current belief or implemented process. Mr. Kafka expressed it here and, regardless of the translation, it remains the same – difficult and risky. But if "existing conditions" are not providing the desired results, change must occur and the concerns voiced by Mr. Kafka must be addressed.

## Resources and Templates

eCameron's website contains a large variety of reference materials on Project Management subjects. These include templates, processes and further discussions on a variety of topics. Please feel free to browse our site at [www.ecaminc.com](http://www.ecaminc.com)

Or contact: Todd C. Williams, Phone: 1.360.834.7361 e-mail: [todd.williams@ecaminc.com](mailto:todd.williams@ecaminc.com)

Following is a list of some of the items to be found on our website.

Subject	Description	Format	Location
Templates Homepage	Home page for the items listed below	Various	<a href="http://www.ecaminc.com/Templates/Templates.html">http://www.ecaminc.com/Templates/Templates.html</a>
Change Management Process	A complete Change Management process document.	Word	<a href="http://www.ecaminc.com/Templates/CRProcessWord.html">http://www.ecaminc.com/Templates/CRProcessWord.html</a>
Change Log Template	An Excel template for a change log.	Excel	<a href="http://www.ecaminc.com/Templates/CRLogXL.html">http://www.ecaminc.com/Templates/CRLogXL.html</a>
Change Request Template	A Word template Change Request form.	Word	<a href="http://www.ecaminc.com/Templates/CRFormWordDot.html">http://www.ecaminc.com/Templates/CRFormWordDot.html</a>
Estimation Template	An Excel template for estimating project changes.	Excel	<a href="http://www.ecaminc.com/Templates/EstimateXL.html">http://www.ecaminc.com/Templates/EstimateXL.html</a>
Executive Presentation Material	Various presentation ideas and templates for concisely expressing complex data to executives.	Power-Point	<a href="http://www.ecaminc.com/Templates/ExecSummary.html">http://www.ecaminc.com/Templates/ExecSummary.html</a>
Generic Project Document Template	General project template to be used for specification and other control documents.	Word	<a href="http://www.ecaminc.com/Templates/ProjectDocDot.html">http://www.ecaminc.com/Templates/ProjectDocDot.html</a>
Meeting Minutes Template	A Word Template for Meeting Minutes.	Word	<a href="http://www.ecaminc.com/Templates/MinutesWordDot.html">http://www.ecaminc.com/Templates/MinutesWordDot.html</a>
Risk Tool	A risk probability accumulator. Aggregates risk into a project level impact.	Excel	<a href="http://www.ecaminc.com/Templates/RiskToolXL.html">http://www.ecaminc.com/Templates/RiskToolXL.html</a>
Time Reporting	Excel Template for tracking time reporting	Excel	<a href="http://www.ecaminc.com/Templates/TimesheetXL.html">http://www.ecaminc.com/Templates/TimesheetXL.html</a>
Previous Newsletters published by eCameron.		PDF	<a href="http://www.ecaminc.com/ColProjMgmt/CPMIndex.html">http://www.ecaminc.com/ColProjMgmt/CPMIndex.html</a>
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