

5 everyday project management omissions that derail deadlines and budgets

A GUIDE TO THE SIMPLE EVERYDAY OVERSIGHTS THAT LEAD TO MAJOR PROBLEMS IN PROJECTS (AND HOW TO PREVENT THEM)





WRITTEN WITH JULIA CHECCHIA

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ABOUT JULIA CHECCHIA

In addition to a hefty CV in project and program management for organisations such as PWC, UNSW, ServiceNow, Hitachi and IBM, Julia is qualified as a scrum master, product owner, project management professional and program manager. Julia also trains and mentors project managers.

“SUCCESS IS NOTHING MORE THAN A FEW SIMPLE DISCIPLINES, PRACTICED EVERYDAY”

JOHN ROHN

IN PROJECT MANAGEMENT, IT DOESN'T TAKE MUCH FOR THINGS TO CAREEN OFF COURSE.

Sometimes poor judgement, wilful negligence or laziness are to blame. But often it's nothing more than the simplest of everyday omissions (repeated over a long duration) that compound to catastrophe. The fallout can include time wastage, frustration and budget blowout.

In this eBook, Julia reveals the common omissions project managers overlook and their impacts. In exploring these, we'll highlight the specific practices you should implement (and persevere with) at all costs to protect your project—and sanity.

HOW 'BUSYNESS' GETS IN THE WAY OF IMPORTANT PRACTICES

We all know how it is. You begin with the best intentions, but as your project gathers momentum it can be hard to maintain best practice as your workload trebles and time becomes a precious commodity. Yet as in the butterfly effect, neglecting such practices will only create exponentially more workload for you long term. No matter how busy things get, investing the small additional amount of time each day to do a thorough job is nothing compared to the time required to fix things once omissions graduate into full-blown issues.

“FAILURE IS NOTHING MORE THAN A FEW SIMPLE OMISSIONS MADE EVERYDAY”

JULIA CHECCHIA



1 YOU HAVEN'T PROPERLY DEFINED THE SCOPE

IN THE (ONCE POPULAR) WATERFALL METHODOLOGY, PROJECT MANAGERS BROUGHT THE TEAM TOGETHER TO DETERMINE THE WORK BREAKDOWN STRUCTURE AND DICTIONARY.

Today, people say the work breakdown structure is dead, preferring instead the agile methodology's backlog catalogue. But the purpose is ultimately the same. It's just in agile it's the product owner's responsibility to create the backlog catalogue, making it easy to dismiss as 'somebody else's problem'.

Do not be tempted to skip out on properly defining the scope, even in agile. The product owner still needs a mechanism to understand the major deliverables and dependencies between them. Only you as the project manager can facilitate this. When you assume agile will take care of everything, you end up putting out fires later when the gaps lead to issues. Particularly in a multi-vendor environment, failure to understand the link between deliverables means you can't prioritise or assign resources effectively.

SCOPE PLANNING ESSENTIALS

To define the scope, start with a list of deliverables and then create to-dos. Set out the ultimate goal for the project. Whether you define it as work packages or user stories, you need to understand what will be delivered, then the 'how' and 'when'. You can't afford not to pull everyone into a room to understand the full dependency on your deliverables! You won't have a reliable schedule without doing so.

2 YOU SCHEDULE PROJECT DATES MANUALLY AND FORGET TO DO MODELLING

WHATEVER PLATFORM YOU USE FOR PROJECT MANAGEMENT SCHEDULING, IF YOU WANT TO UNDERSTAND A PROJECT CRITICAL PATH, YOUR SCHEDULING TOOL MUST BE STRUCTURED AS A SERIES OF INTERCONNECTED ACTIVITIES OR DELIVERABLES.

There should be very few manually scheduled tasks in your project timeline. From start to end, all activities should flow automatically.

The only three dates you should schedule manually are:

- Your project start date
- Hard coded constraints
- Risk or issue eventuation or completion date (when it impacts a subsequent deliverable)

Julia has seen cases of project managers claiming they know their critical path, despite not having used a proper tool to generate it. She cautions strongly against this. "Once you have a fabricated critical path that is not supported by a sequence of activities, you lose the ability to use your schedule as a modelling tool. Manually

scheduled activities create a 'garbage-in-garbage-out' situation. You lose tonnes of time crunching numbers because you have no system to calculate the varying possibilities. You simply can't make sound assessments based on this", she says.

For a schedule to be effective, it must include risk and issue treatment plans, with risks assessed for each core deliverable. After deciding whether you will either avoid, transfer, mitigate or accept an identified risk, you can use the scheduling tool to model risk impact.

If an issue occurs, it is bound to impact dependent activities. That's why adding issue completion dates to the schedule and properly using activity relationships to model issue resolution to the critical path is so powerful.

PRO TIP

You can't rely on a 'finger in the air' estimation when running a major project. And you certainly shouldn't be using an Excel to map the critical path manually! You need a project platform that offers seamless forecasting functionality and project modelling.

AUTOMATED PROJECT MANAGEMENT SOFTWARE IS A MUST

A modelling tool gives you the power to see what will happen when you adjust the variables. Whichever tool you prefer (whether Trello, Microsoft Project, Jira, Primavera, Service Now or another tool), taking advantage of automated scheduling that forecasts problems in advance supports you to take preventative or corrective measures as you go.

YOU MUST MONITOR THE ONGOING RISKS OF YOUR DELIVERABLES!

For every deliverable in your project you should understand:

- The deliverable's risk
- The risk to the total project if that deliverable were late

While some project managers are fastidious in conducting initial risk workshops and ongoing meetings to assess changes, others forget altogether. They create excellent risk management plans only to 'file and forget'. This might satisfy an auditor, but it's you who pay the price when you don't bother to follow your risk management plan - you will find yourself managing issues rather than risks.

Don't assume the person assigned to a risk will deal with it! Conducting ongoing risk meetings is essential so you can take corrective or preventative actions and avoid impact to your entire project.

Along with allowing you to model paths, adding risk treatment eventuation and issue completion dates to your schedule can also help you to negotiate activities and provide empirical data for sponsorship support.

3 YOU IGNORE BASIC COST MANAGEMENT

JULIA RECOUNTS A PROJECT MANAGER WHO ONCE TOLD HER "I AM NOT A FINANCIAL MANAGER AND I SHOULD NOT HAVE TO DO THE COSTINGS FOR MY PROJECT. SOMEONE ELSE SHOULD DO THAT".

And it's true, you might be lucky enough to have a financial or procurement manager who handles the finances and contract management for you. But a project manager must still understand basic cost and procurement management intricacies.

If you don't understand different vendor contract types, you may not be maximising vendor resource utilisation. If you don't understand financial management, you might not understand the impact of cash availability versus activity re-prioritisation.

WHY IT'S ESSENTIAL TO KNOW THE NUANCES OF 'FIXED FEE' VS 'TIME AND MATERIAL' CONTRACTS

With fixed fee contracts, things are (relatively) simple. Your requirement is well defined, and the vendor is happy to take all the risks to deliver. In contrast, when your requirements lack clarity, vendors operate on a time and materials contract to reduce their risks, and this is where things can get messy.

This contract type essentially removes the vendor's commitment to produce a deliverable by an agreed date. They may commit to a statement of work and initial estimate, but after commencing, it begins to creep, with more people and more days required to complete the job. Though this is frustrating, it's up to you to manage the contract assumptions appropriately and agree on a facet of earned value management to forecast costs.

PRO TIP

Julia has led multivendor projects where vendors were engaged on 'time and materials' contracts, while others were hired on fixed fee contracts. Her understanding of cost, procurement and earned value management helped to make sound trade-off schedule decisions to maximise project financials. When you have such knowledge, you can use it to create integrated project change control impact assessment on occasions where trade-off is not possible.

4 YOU UNDERESTIMATE THE TIME NEEDED FOR GOVERNANCE ACTIVITIES

STAKEHOLDER MANAGEMENT OR RESOURCE MANAGEMENT? THIS CONCEPT CREATES CONFUSION IN THE PROJECT WORLD, PARTICULARLY WHEN CLASSIFYING THE PROJECT TEAM.

While the project team is no doubt a stakeholder group, they must be thought of and managed as resources rather than lumped under the general stakeholder umbrella. Why is this an issue? You forget to factor in time for good governance and good team communication.

Let's explore this. On a major project, you can be blindsided by the number of boards or steering committees you are expected to report to or sit in. You forget to consider this in your project timeline and before you know it, you're bogged down creating endless governance materials. There is always one more board to respond to, one more approval process to endure or one more committee to attend.

DON'T GET CAUGHT OUT BY A HEAVY GOVERNANCE WORKLOAD

Instead of finding yourself reactive to governance needs, pre-plan these activities for the entire duration of the project.

This includes for:

- Steering committees
- Sprint planning, reviews and retrospectives
- Board meetings and reports
- Team communication and celebrations

Make a thorough assessment of all governance requirements upfront then book them in your calendar - or assign a delegate that can represent you on such matters. Schedule, schedule, and schedule!

Most organisations don't have tools for easily creating governance materials. It's therefore incredibly important to plan thoroughly and resource adequately upfront. Determine who will be responsible for compiling materials, whether it's you or someone else in the project team. And if you're finding governance activities are sucking away all your time, it's critical to document this and raise it as a major issue with your sponsor.

5 YOU NEGLECT TO TAILOR COMMUNICATION TO YOUR AUDIENCE

WHEN DESCRIBING YOUR PROJECT TO DIFFERENT AUDIENCES, IT'S EASY TO FORGET TO TALK TO THEM IN LANGUAGE THEY UNDERSTAND.

Some stakeholders possess little technical knowledge and will only be interested in

benefits or impacts to their job. If you use technical jargon when communicating with them, you will lose them. Through poor communication, you could also fail to understand a major issue that could impact the schedule or budget.

In contrast, when talking to executives you must articulate the attainment of strategic goals. If not, you're probably communicating things that are irrelevant for them. At worst, this could see you lose their support and assistance with removing blockers.



STAKEHOLDER GROUP	HOW TO COMMUNICATE WITH THEM
C-SUITE	<p>Use business-oriented language. Speak to the attainment of strategic goals and objectives. Communicate in terms of achievements or risks to important milestones (such as the start date, vendor contract dates, investment committee dates, user acceptance verification and launch dates).</p> <p>Remember the purpose of each and communicate accordingly:</p> <ul style="list-style-type: none"> ▪ A project's aim is to satisfy an objective. ▪ A project's aim is to satisfy a strategic goal. ▪ A portfolio's aim is to satisfy the organisation's vision.
TECHNICAL TEAMS	<p>Use technical language to be clear, specific and understandable.</p>
BUSINESS TEAM	<p>Speak about the project benefits and how it impacts the team or person's role. Avoid language that is technical or project oriented.</p>



WHY IMPORTANT COMMUNICATIONS SHOULD NEVER BE DELEGATED...

NEVER MAKE THE MISTAKE OF DELEGATING KEY PROJECT DOCUMENTS TO INEXPERIENCED TEAM MEMBERS TO REDUCE YOUR OWN WORKLOAD.

During a programme Julia delivered, a project manager asked a junior project coordinator to produce the kick-off pack on their behalf. As a result, they were handed a document consisting entirely of copy-pasted segments from the statement of work.

There was no time to re-work the pack before the presentation to the entire team (including senior management). The meeting was less than efficient and had to be rescheduled for a later date, wasting precious Time and Materials (T&M) funds.

Take heed! If a document is going to a CFO or CTO, it needs to be produced by someone experienced in communicating in the language of a C-suite audience.

FINAL TAKEAWAYS FOR LIVING 'OMISSION FREE'

WHILE IT MAY SOUND LIKE A LOT TO DO, INVESTING A SMALL AMOUNT OF TIME EACH DAY WILL ELIMINATE YOU HEMORRHAGING EXPONENTIAL HOURS IN THE FUTURE.

1 TAKE THE TIME TO PLAN

This includes scope, deliverables, dependencies, governance activities and responsibilities. Agile is not an excuse to shorten or skip planning.

2 PROPER PROJECT MANAGEMENT TOOLS ARE DESIGNED TO REDUCE YOUR WORKLOAD

They are your friend, so use them! And remember, Excel is not a project management tool (unless you have outstanding skills and a small project).

3 DO IT RIGHT THE FIRST TIME

Or do it twice and prepare for cleanups.

SAY GOODBYE TO OMISSIONS WITH INCREDIBLE PROJECT MANAGEMENT SOLUTIONS

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