

# Project Management in the Real World

## **Shortcuts to success**

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Elizabeth Harrin



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# Contents

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List of Figures and Tables	ix
About the Author	xi
Acknowledgements	xiii
Glossary	xv
Preface	xix
Foreword	xxi
<b>Section 1: Managing project budgets</b>	<b>1</b>
<b>1</b> Create a realistic budget	2
<b>2</b> Calculate the true cost	7
<b>3</b> Agree a budget tolerance	10
<b>4</b> Track estimate to complete	14
<b>5</b> Have a contingency fund	18
<b>6</b> Gain buy-in for collective responsibility	21
<b>7</b> Agree who holds signing authority	26
<b>8</b> Watch each budget line	28
<b>9</b> Arrange for a peer review	31
<b>10</b> Manage the model	34
<b>11</b> Manage projects with no budget carefully	37
<b>Section 2: Managing project scope</b>	<b>41</b>
<b>12</b> Keep it small	43
<b>13</b> Work out how to manage changes	46

<b>14</b>	Include quality planning in scope	49
<b>15</b>	Work out how to track benefits	52
<b>16</b>	Eliminate ambiguity	57
<b>17</b>	Use version control	60
<b>18</b>	Put a post-project review in scope	64
<b>19</b>	Identify risks up front	69
<b>20</b>	Manage risks	72
<b>21</b>	Manage issues	77
<b>22</b>	Document assumptions	80
<b>23</b>	Involve users in scope definition	83
	<b>Section 3: Managing project teams</b>	<b>89</b>
<b>24</b>	Communicate and document changes	90
<b>25</b>	Get them to believe	94
<b>26</b>	Know the culture of your team	96
<b>27</b>	Agree who is going to sign off	98
<b>28</b>	Don't forget the soft stuff	100
<b>29</b>	Train your sponsor	103
<b>30</b>	Bribe your team	107
<b>31</b>	Carry out stakeholder analysis	109
<b>32</b>	Present your stuff interestingly	115
<b>33</b>	Organize a party	117
<b>34</b>	Find out what motivates your stakeholders	119
	<b>Section 4: Managing project plans</b>	<b>121</b>
<b>35</b>	Keep up the momentum	122

<b>36</b>	Plan first – set end date later	124
<b>37</b>	Manage fixed-date projects carefully	127
<b>38</b>	Have short tasks	131
<b>39</b>	Understand the critical path	134
<b>40</b>	Understand where you're starting from	138
<b>41</b>	Baseline your plan	140
<b>42</b>	Record time	143
<b>43</b>	Make meetings productive	145
<b>44</b>	Delegate subplans to workstream leaders	148
<b>45</b>	Work out when you will leave	151
	<b>Section 5: Managing yourself</b>	<b>153</b>
<b>46</b>	Get organized	154
<b>47</b>	Keep your records tidy	157
<b>48</b>	Don't lose sight of the end goal	159
<b>49</b>	Promote yourself	163
<b>50</b>	Don't panic	167
<b>51</b>	Know what's a showstopper	169
<b>52</b>	Learn how to facilitate	172
<b>53</b>	Get a mentor	176
<b>54</b>	Do documentation	179
<b>55</b>	Don't be afraid to suggest they pull the plug	183
<b>56</b>	Archive effectively	185
	Appendix	187
	Notes	189

*Contents*

Further reading	197
Index	201

# List of Figures and Tables

---

Figure 2.1	Types of project expenditure	8
Figure 3.1	Time and budget tolerances for a hypothetical project	12
Figure 4.1	Calculating estimate at completion	16
Figure II	The golden triangle of scope, resources and time management	42
Figure 17.1	Sample version control table	62
Figure 19.1	Matrix for calculating risk priority	71
Figure 23.1	The mental model mismatch	87
Figure 24.1	The change communication wheel	91
Figure 31.1	Mapping stakeholder interest and influence	112
Figure 39.1	Critical path diagram for glass collection project	136
Figure 44.1	Example project organization structure	149
Figure 46.1	Urgent and important tasks	155
Figure 48.1	Helicopter view of a project	162
Table 15.1	Types of success criteria	54
Table 17.1	Tips for version control	63
Table 18.1	PPR checklist: example questions to ask during the post-project review	67
Table 20.1	Risk responses	75
Table 39.1	Task list for project to start up a collection scheme for recycling glass	135
Table 40.1	Types of dependency	139
Table 47.1	Tips for record-keeping	158
Table 54.1	Standard project documents	181
Table 54.2	Example of a signature area on a typical project document	181

# About the Author

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Elizabeth Harrin has worked within the financial services industry since 1998. Now a senior project manager for the global financial services company AXA, she has successfully led a wide range of technology and business projects, involving managing international project teams across multiple sites. Elizabeth is a PRINCE2 Practitioner and is trained in the Six Sigma process improvement methodology as a Black Belt. An alumnus of the universities of York and Roehampton, Elizabeth is a keen gardener, a hobby which is seriously hampered by the fact that she currently lives and works in Paris, where vegetable patches are non-existent.

# Acknowledgements

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I am indebted to the many managers and companies who have generously given their time and offered their experience for these case studies.

In many ways, producing this book was a family affair. Numerous errors were spotted and erased by the eagle eyes of Pauline Harrin. Several of the diagrams were produced by Caroline Harrin, whose talent for turning my scribbles into graphics that mean something never fails to amaze. And if it wasn't for my father Alan, who taught me how to program on a tape-driven computer, I might not be working with technology today.

Thanks are due in particular to my husband, Jon Borley, who was generous with his great ideas, suggestions and cups of tea.

I am also grateful to the team at BCS, in particular Matthew Flynn for his patience and support throughout the process. His input, plus that of the two anonymous reviewers, helped me improve the text. The book has been extensively proofread and reviewed, and so any errors or omissions in it are strictly my own.

# Glossary

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**Actual cost of work performed (ACWP)** Amount of money spent on the project activities up until a given date.

**Assumptions** Statements made during a project that are not based on known or certain facts.

**Baseline** Stake-in-the-sand view of a project schedule, budget or other moveable activity that provides a comparison of the actual situation against the expected situation.

**Business-as-usual** Day-to-day activity as distinct from project activity.

**Change control** Process of managing change in a controlled way.

**Change management** See *change control*.

**Contingency** Provision made within the project planning stages to allow for unforeseen circumstances; usually built into the budget or schedule.

**Critical path** Longest route through a project plan; collective name for the group of tasks that must be completed on time in order for the project to deliver to the planned end date.

**Critical path analysis** Process of establishing the critical path; can include drawing out the critical path diagrammatically.

**Deliverable** Something tangible delivered as a result of the project.

**Dependency** Relationship that links the order in which activities are carried out. Task B is said to be dependent on task A if the start or finish date of task A must be reached before task B can start.

**Earned value analysis (EVA)** Method to establish the budget and schedule position of a project based on resource planning.

**Estimate at completion (EAC)** Total budget required to finish the project, calculated by adding together estimate to complete and expenditure incurred to date.

**Estimate to complete (ETC)** Budget required to finish the project calculated from a given date to the project end.

**Ice-breaker** Activity or short game used to introduce team members to one another; used in workshops, long meetings and at the beginning of projects.

**Issue** Risk that has actually occurred or another known circumstance that may impact the project's outcomes.

**Issue log** Document listing all the issues that are impacting the project; updated with the activities required to actively manage and resolve each issue.

**Issue register** See *issue log*.

**Milestone** Date by when a particular chunk of work is due to be completed.

**Network diagram** Visual representation of a project plan, showing the links between each task; used in critical path analysis.

**Plan** Document, or several documents, detailing exactly what the project needs to do in order to deliver the objectives; a practical analysis of what deliverable will be produced by whom and when.

**Pilot phase/stage** Project implementation in miniature to test and assess the impact of the deliverables before the project is fully rolled out.

**Programme** Collection of projects with a common theme, sponsor or reporting process.

**Proof of concept** Test of the project deliverables in a controlled environment; shorter and more laboratory-based than a pilot.

**Post-implementation review** See *post-project review*.

**Post-project review** Meeting to evaluate the project's successes and challenges and record any learning for future projects; a way of sharing corporate knowledge.

**Project board** See *steering group*.

**Requirements document** Document that records all the things (requirements) the end user wants from the project; used as a basis for technical documentation.

**Risk** Statement of the possibility that something unforeseen will happen to the project that will have a negative or positive impact on the outcome.

**Risk log** Document listing all the risks that may impact the project; updated with the activities required to minimize each risk.

**Risk register** See *risk log*.

**Risk response** Approach to managing a risk; typically one of: avoidance, transference, reduction, acceptance.

**Schedule** Document listing all the tasks that need to be done in order to complete the project and the dependencies between them; the project calendar.

**Scope statement** Description of what is included in the project and what is not; covers deliverables but also groups of people impacted and the reach of the intended activity.

**Sponsor** Senior manager who heads up the project; person who champions the work and to whom the project manager reports with project progress.

**Stakeholder analysis** Exercise to determine the interest and influence of stakeholders to establish their support for the project and what can be done to influence their position.

**Stakeholder mapping** See *stakeholder analysis*.

**Stakeholders** People who have an impact on, or who are interested in, the project.

**Steering committee** See *steering group*.

**Steering group** Group made up of the project sponsor, project manager and one or two other key stakeholders; this group is responsible for decision making.

**Success criteria** Standards by which the project will be judged at the end to decide whether it has been successful in the eyes of the stakeholders.

**Test scripts** Documents explaining the step-by-step method required to test a deliverable; given to testers to ensure testing is done in a methodical way.

**Workstream** Part of the project that can be managed as a discrete chunk; led by a workstream leader.

# Preface

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*Project Management in the Real World* won't teach you how to be a project manager. It's not going to show you how to set up your first project, walk you through it and see you out the other end with all the benefits realized.

Traditional project management books do that, following the project life-cycle with chapters on project definition, initiation, execution, closure and so on. This book is different.

It's for people who already know that a project has a beginning, a middle and an end and who want to take project management further. It's for people who know the theory and feel there must be an easier way to get things done. It's over 250 years' worth of combined project management experience distilled into 200 pages so you can see how other people run their projects outside the management texts and research papers: how projects get done in the real world.

This book is organized into five sections: managing the project budgets, scope, teams, plans and yourself as project manager. Wherever you are in your project, you should be able to easily find information relevant to the particular situation you find yourself in.

Each section is divided into short chapters, which explore discrete elements of the business of project management. Each chapter includes an anecdote from a manager who has been there and done it or a case study from a project with a valuable lesson to be learnt. For clarity, and also because this book is designed for people without much time to study project management theory extensively, each short chapter covers one discrete point that you can put into practice immediately: you'll understand both why and how things can be done. Dip into the chapters at random and pick a section, or make your way methodically through the section most relevant to where you are in your project at the moment. If a topic particularly grabs you, flick through the further reading suggestions and references to find ways to take it further.

Throughout the book, you will see icons in the margins to guide you to important information in the text. Here's the key:



## HINT

A hint or tip to help you apply the knowledge in the chapter.



### **ANECDOTE**

An anecdote or case study: real-life experiences from project managers who have been there.



### **GOLDEN RULES**

The golden rule to remember, even if you don't remember anything else about the chapter.



### **DEFINITION**

A definition of a project management term or principle.



### **WARNING**

A potential trouble spot or project management pitfall.

Some names and project settings have been changed or disguised at the request of interviewees. The chapters cover the elements that I feel are most relevant to modern project management but are frequently overlooked. It has not been possible to include everything I wanted, and I'm sure you'll have a favourite hint, tip or memory that you believe other project managers could learn from. Please email me with your ideas for another volume at [elizabeth@elizabeth-harrin.co.uk](mailto:elizabeth@elizabeth-harrin.co.uk).

Elizabeth Harrin  
Paris, July 2006

# Foreword

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In this book, Lonnie Pacelli is quoted as saying ‘Surprises are for birthdays’. It was in fact a few days after my birthday that Elizabeth Harrin approached me to write this foreword, a very pleasant surprise!

In the media, we frequently read or hear about project failures, which consequently adversely affects the reputation of all project managers. The success stories rarely hit the headlines. As Chair of the BCS Project Management Specialist Group (BCS PROMS-G), I am, *inter alia*, responsible for promoting professionalism in our specialist sector of the information technology (IT) industry. By providing, through our countrywide events, timely and relevant information on industry developments and by sharing lessons learned, PROMS-G promotes continuing professional development. Our aim is that project managers, and therefore their projects, will be increasingly successful and hit the headlines for the right reasons. Elizabeth is one of our 5,000-plus valued members and an occasional speaker.

A key skill required of all project managers is to identify potential risks and to remove or mitigate their effect before they become issues. While we all appreciate pleasant surprises, it is the unpleasant ones that have the most adverse effects on a project. Regardless of whether you are an experienced project manager, it is highly probable that you will come across both types of surprise.

It is, however, impossible for project managers to foresee all situations that may arise. While we should all attempt to continually develop our professionalism and to keep abreast of developments in our own industry or particular area of expertise, this may not always be possible due to the large amount of change that occurs. It is therefore imperative that project managers are able to focus on these changes and assess their impact rather than spend their precious time resolving underlying project management issues such as budgets, processes and so on.

This book aims to assist with getting the latter right. It is a valuable reference point for ensuring that a project has the underlying essential processes and authorities in place and that they are working as intended. Some of the pitfalls that await the unwary or unskilled are identified and guidance is provided on how to avoid them. In following these recommendations, and not spending time resolving basic issues, a project manager’s time will increase, allowing him or her to focus instead on the more critical risks and issues.

It is no surprise to me that Elizabeth has written a book that is very easy to read and that you can dip in and out of as required. Each part is self-contained and will provide that nugget of information you have been looking for. Elizabeth has collected the issues, anecdotes and success stories not of entire

projects but of the elements within them. I am pleased that so many project managers were willing to share their experiences, because it is only by sharing and learning from these experiences that we can all continually develop and enable our professionalism to grow. All project managers, whether working in IT or in other industries, will identify easily with the lessons learned. If you find something works for you, then please pass it on. By the way, PROMS-G is always looking for speakers for our events.

The phrase 'Surprises are for birthdays' is one of the mantras that should guide us in all aspects of project management. As a professional project manager and chair of PROMS-G, perhaps I should have anticipated the pleasant surprise of being asked to write this foreword. On the whole though, I would rather focus on avoiding the unpleasant surprises and leave the pleasant surprises just as they are. Elizabeth's book helps to do just that.

Ruth Pullen  
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March 2006

# Section 1

## Managing project budgets

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*Know that with a farm, as with a man, however productive it may be, if it has the spending habit, not much will be left over.*

Marcus Porcius Cato (BC 234–149), *De Agricultura*

More than one-third of projects have a budget of over £1 million, and so knowing how to handle the finances is an essential part of a project manager's repertoire. The initial budget is often just a starting point. An incredible 56 per cent of projects are affected by budget changes, and that's not just a one-off financial revision. The average project, if there is such a thing, has its budget revised 3.4 times.<sup>1</sup>

Keeping on top of all this is not always easy, and it is made harder by the fact that project managers themselves don't always get control over the money. This section covers how to manage project variables over which you do not necessarily have authority, how to find out who has that authority, and how to manage the relationship with the budget holder. Many projects do not appear to have budgets at all, and Chapter 11 looks at working effectively in that environment. This section also looks at reporting, tolerances and contingency.

# 1 Create a realistic budget

---

Even the smallest project will have overheads, your time as the project manager being a minimum. Nearly all projects will have more than that, so part of your role in setting up the project is to define and propose a budget for the work and get that approved.



## BRAINSTORMING THE BUDGET

‘I haven’t had much experience handling money, so doing my first project budget was really hard,’ says Emily Jones, a junior project manager in a small public relations consultancy. The project was to revamp a room that had been used for storing spare furniture into a new area for holding workshops. ‘My sponsor left me to it, so I had to work out the money I thought I’d need by myself.’ Jones set up a brainstorming session with her team and asked them to help her identify all the likely costs for the project. ‘We came up with the obvious ones like staff salaries and buying the new office furniture really quickly,’ she says. ‘Then I asked them to be more creative, and someone said “Hiring a projector for the staff briefing.” OK, so that might not sound really creative, but as our company projector had just broken, and we were scheduled to do a presentation on the project in three weeks at a briefing for all 45 staff, it was a cost I certainly hadn’t thought of.’ In fact, Jones hadn’t even known the company projector was broken. The replacement was on order but not due to arrive for another five weeks. Jones wanted her presentation at the company briefing to be professional, and projector hire was not a great deal of money, so a member of the team was tasked with finding an estimate and the cost was added to the budget. ‘On the subject of hire, we also came up with hiring a van to take the old furniture to a charity warehouse. We could have had the council take it away for free, but we decided we’d rather it went to a good cause, so that cost ended up in the budget too.’

Jones split the identified costs into groups. ‘In the end we had a group of charges for manpower for our time and one part-time contractor, and a group of charges for putting in a new telephone, the decorating costs and some miscellaneous things. I added a contingency line of 15 per cent of the overall budget as I knew many of the costs were just estimates,’ Jones continues. ‘I explained to my sponsor that this was for risk management and he cut it to 10 per cent. I thought that was reasonable, and he approved the budget on that basis.’

Creating a budget is like putting together a project schedule, which we’ll look at later. You can work out how much money you will be spending based on what you know needs to be done, just as you work out how much time the project will take based on the same information. Think of the budget as

a shopping list of all the things you need to buy to make sure the project gets completed. Just like a trip to the supermarket, you might not end up spending exactly what you expected but at least the list gives you a reasonably accurate starting point. 'When planning, assume your budget will not be increased or decreased during the project,' writes George Doss in the *IS Project Management Handbook*. 'Budget changes . . . are adjusted through negotiations with the project sponsor based on circumstances at the time.'<sup>2</sup>

There are five steps to creating a project budget:

- (i) Identify the resources required for the project.
- (ii) Estimate the cost for each of those resources.
- (iii) Document the costs and calculate the overall figure.
- (iv) Submit the budget to your steering committee or sponsor for approval.
- (v) Find out your budget code.

Let's take each of those steps in turn.

## IDENTIFY THE RESOURCES REQUIRED FOR THE PROJECT

Review the schedule, project initiation document and any other documents you have to identify the activities that need to be completed. Draw on your stakeholders and project team to brainstorm anything else that might be required, e.g. travel, accommodation, couriers, equipment. Will your project have to pick up the costs incurred by other areas of the business that are impacted by the work you are doing? Ask other managers who have done similar projects to validate your list.

## ESTIMATE THE COST FOR EACH OF THOSE RESOURCES

Every step, every task of the project will have associated costs. Projects that do not have full-time staff may avoid paying for the entire salary of anyone working on it, so ask the finance department whether there is a list of standard chargeable rates per 'type' of employee. For example, your project might have to pay £1,000 per day for an expert manager but £650 per day for a junior marketing executive. Some of these costs may be just 'paper' prices – especially for internal resources. They are just figures you plug into the business case, but in reality money never changes hands. Check out your company's rules for charging for business resources, and also check with each department head about their expectations. For example, if they are loaning you a person, then they may expect the project to fund a temporary resource to backfill that person's day job.



### A NOTE ON ESTIMATING

Given the flexible nature of budgets, and projects in general, it's very hard to pin down costs to an exact figure at this early

stage of the project. And it's not a good idea either, unless you are absolutely 100 per cent sure that your estimation is spot on and will not change.

At this stage, present your estimates as a range rather than a fixed sum. This means your overall project budget, once you have added up all your estimates, will be between £x and £y. It's this range that you present to your steering group and sponsor.

Presenting a range means a little more flexibility later on. It also gives you the chance to start managing the expectations of your sponsor now – they will have to come to terms with vagaries and changes as the project progresses, so now is a good time to start explaining the nature of project management.

## **DOCUMENT THE COSTS AND CALCULATE THE OVERALL ESTIMATE**

Companies that carry out a lot of projects will probably have a standard template for submitting a budget, so find out whether a form already exists. Create your own form in the absence of anything standard, using a method that suits you, for example a computer spreadsheet. The advantage with an electronic budget spreadsheet over using a word-processing package or a paper system is that the figures will update automatically, reducing the risk of manual error and saving time. Group together similar costs, so you have subtotals as well as an overall total, and include a line of contingency for risk management. Compare your budget range with any amount given to you by the project sponsor, and see below for what to do if the figures don't match.

## **SUBMIT THE BUDGET TO YOUR STEERING COMMITTEE OR SPONSOR FOR APPROVAL**

Once you have your budget written down, it needs to be approved before the project can continue. Your sponsor or steering committee is the first point of approval. They will advise you on whether the budget needs another level of approval from finance, a central planning committee, an IT authorization forum or another group, depending on where the funds are actually coming from.



### **WARNING**

More often than not, you'll be asked to kick off the project without budget authorization. In the real world, there are deadlines to meet that won't wait just because the budget committee meets only on the last Tuesday of the month. If

you're asked to start work without the relevant approvals, get on with it! But make sure you have something in writing to cover yourself against any expenditure incurred during the time you're working without an approved budget.

## FIND OUT YOUR BUDGET CODE

Assuming all goes well, the budget will be approved and you will be given the go ahead to spend the money required. Any expenditure needs to be tracked back to the project so the budget holder can keep an eye on what is being spent. The project might be allocated its own pot of money, ring-fenced from other budgets, in which case you will probably have a cost centre code of your own. Alternatively, the project might be allocated a portion of the budget for a particular department. If this is the case, ask your sponsor how they want you to identify project spending. A non-committal answer means you will have to invent your own code, perhaps the project number or a shortened version of its name. When you sign an invoice or raise a purchase order, use the code to ensure the expenditure can be tracked back to the project; make certain that anyone else who has the authority to use the budget does this as well.

### WHAT IF MY SPONSOR ALREADY HAS A BUDGET IN MIND?

Just because this is a sensible five-step approach that allows you to analyse the work involved and cost it accurately does not mean it is followed by all project sponsors. For many reasons, you could find yourself working on a project where the sponsor already has a set figure in mind. Some sponsors will knock off 10 per cent from your total because they believe the numbers are padded. Others may be compelled to halve the budget because someone higher up the chain expects cuts across the board.

If you put your mind to it, you can complete any project to a specified budget – at a hidden cost. Corners will need to be cut, quality might suffer and the customers may not get everything they thought they would. Present your steering group with a couple of options for reducing your proposed budget to their predefined figure, making the trade-off between quality, time, scope and cost. They may still tell you that it's their budget you need to follow, but at least you have explained the risks of delivering to a certain abstract budget figure and you have your planning documentation to back up your arguments.



### GOLDEN RULES

To create a realistic budget, base your predicted expenditure on your project planning documentation and get the budget

approved as quickly as possible to prevent any delay in starting work.

# Index

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- action plans 74, 78–79, 111, 168
- actual cost of work performed (ACWP) xv, 15–17
- ACWP
  - see* actual cost of work performed
- agendas 146, 147
- archiving 185
- assumptions xv, 39, 58, 80–82, 150
- audit trail 47, 79
- authority
  - identifying 98–99
  - signing 26–27
- awards 118
  
- Baccarini, D. 70, 74–75
- backups 158
- Bailey, G. 123
- baselines xv, 140–142
  - of current performance 54–56
- benefits
  - delivering 131, 133
  - tracking 52–56, 152
- Bens, I. 174
- binding decisions 99
- Blackburn, S. 180
- Boddy, D. 111
- Bradbury, D. 32
- Brown, M. 146–147
- budget code 5
- budgets
  - see also* expenditure
  - authorizing spend 26–27
  - business as usual 37–40
  - changes to 3, 11, 13, 24, 48
  - collective responsibility 21–25
  - contingency 2, 4, 11, 18–20, 47
  - creating 2–6
  - documenting 4
  - managing 14–17, 28–30, 34–36
  - methodologies 34–36
  - padding 12
  - reviews of 32
  - working without 4, 37–40
- budget tolerance 10–13
- business-as-usual budget 37–40
- business-as-usual, definition xv
- business-as-usual team 53, 55, 151, 185
- business requirements
  - see also* requirements 58
- business situation, understanding 138–139
  
- career development 163–166, 176–178
- change 46
  - embedding 100–102
- change-control process
  - see also* change management xv, 46–48, 50, 51, 58, 159
- change communication wheel 91–92
- change management xv, 46–48, 78, 142
- change requests 47–48
- Cicmil, S.J.K. 30, 50
- closure 64, 114, 117–118
- collective responsibility 21–25
- commitment
  - recognizing 117
  - stakeholder 56, 85, 131
  - team 94–95
- communication
  - see also* meetings; presentations; reports 83, 90–93, 132
- complaints 44
- conferences 146–147
- constraints
  - documenting 39, 40
  - time 127–130
- contingency xv, 142
  - budget 2, 4, 11, 18–20, 47
  - time 39
- Cooke-Davies, T. 53, 179–180
- corporate culture 97
- cost centre code 5, 23
- costs
  - see also* budgets; expenditure
  - containing 44
  - distribution of 14
  - estimating 3–4, 23, 29, 149
  - human resources 16, 21, 29
  - unforeseen 18, 19
- Crawford, L. 51, 163–164
- credibility 93
- crisis management 167–171
- critical path xv, 134, 135
- critical path analysis xv, 131–133, 134–137
- critical path diagram 135–137
- culture 95, 96–97, 101
  
- deadlines, setting 123, 134, 180
- decision-making 98–99, 101, 105, 129, 161
- Deckro, R.F. 129
- delegation 148–150
- deliverables xv, 43–45, 46, 51, 65
- dependencies
  - see also* critical path analysis xv, 138–139, 150
- deployment
  - see* implementation
- design documents 142
- documentation 179–182
  - archiving 185
  - baselining 142
  - filing 157–158
  - reviews 58, 180
  - signoff 61, 75, 126, 180–182
  - version control 48, 60–63
  
- documents
  - see also* plans
  - design 142
  - project initiation 39, 48, 81, 82
  - requirements xvi, 57–59, 142
  - test 59
- Draper, S.W. 146–147
- Duncan, B. 48
- duration 125–126, 129–130, 132–133, 135
  
- EAC
  - see* estimate at completion
- earned value analysis (EVA) xv, 16
- Elffers, J. 161
- Elkington, P. 69
- emails
  - archiving 158, 185
  - uses of 78, 93, 95, 147, 180
- embedded change 100–102
- end-dates
  - fixed 127–130
  - identifying 32, 124–126, 134
- end goals, achieving 94–162
- estimate at completion (EAC) xv, 15–17
- estimates
  - cost 3–4, 14–17, 23, 29, 149
  - padding 12
  - time 131–132, 142, 144
- estimate to complete (ETC) xv, 14–17
- ETC
  - see* estimate to complete
- EVA
  - see* earned value analysis
- evaluation
  - see also* post-project review 31, 44
- exit strategy 151–152
- expectations
  - see also* mental model mismatch
  - managing 3, 113, 124
- expenditure
  - see also* budgets
  - approval of 23, 26–27
  - predicted 5, 32
  - tracking 5, 11, 14, 16, 29
  
- facilitation 172–175
- failure 183–184
- feedback 43–44, 92, 180
- filing systems 157–158
- Finch, C. 144
- Fink, D. 55
- fixed-date projects 127–130
- focus, maintaining 159–162
  
- Garcia, A.C.B. 146
- Garrett, D. 32
- golden triangle 50

## Index

- Goodman, J. 91  
Greene, R. 161
- Hacker, M. 101–102  
handover 151  
Hebert, J.E. 129  
Heldman, K. 27  
Herroelen, W. 141  
high-level plan 125–126  
human resources, costs of 16, 21, 29
- ice-breaker xvi, 175  
implementation 33, 43–44, 45, 139, 152  
incentives 107–108  
issue management 77–79  
issue register  
  *see* issue log  
issues xvi, 77, 81
- jargon 103–104, 106, 116
- key contact 113  
Kolb, J.A. 174–175
- lead time 27  
Le Guin, U.K. 57  
Leus, R. 141  
Lissak, R. 123  
location, effect of 93, 97, 132  
Love, P.E.D. 70, 74–75
- matrix management 89  
McDowall-Long, K. 176  
meetings 108, 145–147, 174–175  
mental model mismatch  
  *see also* expectations 86  
mentors 176–178  
methodologies, budget 34–36  
metrics  
  *see also* success criteria 32, 52–53  
milestones xvi, 32, 125, 133, 148, 150  
minus tolerances 12–13  
mistakes 65–66, 167–168  
momentum, maintaining 122–123, 131  
motivation 107–108, 117  
  stakeholder 119–120  
multiple teams 148–150  
Murch, R. 171
- network diagram xvi, 135–137  
networking 165, 176, 177  
no-budget projects 37–40
- Obeng, E. 92, 104  
objectives 120, 159  
  commitment to 94  
  of meetings 145–146  
organizational ability 154–156  
organization structure 98–99, 148–149  
overrun 144  
overspend 14, 16–17, 20, 24, 30  
overtime 38, 129, 170  
ownership  
  of change 47–48  
  of issues 78–79, 81  
  of risk 72–76
- paperwork, organizing 157–158
- Paton, R. 111  
peer reviews 31–33  
performance, baseline of current 54–56  
personal organization 154–156  
personal profile, raising 164–166  
personal qualities 167–168  
phased projects 44–45, 53, 75, 125–126  
pilot phase xvi, 43–45  
planning 121, 124–126, 149  
  and assumptions 81  
  critical path analysis 134–137  
  exit strategy 151–152  
  for fixed date projects 127–130  
  using short tasks 131–133  
plans  
  *see also* documents; schedules xvi  
  action 74, 78–79, 111, 168  
  and budgets 7, 11  
  baselining 140–142  
  high level 125–126  
  quality 49–51, 180  
  risk 72, 74  
  subplans 148–150  
  workstream 149–150
- Portny, S.E. 16  
post-implementation review  
  *see* post-project review  
post-project review (PPR) xvi, 64–68, 152  
  information for 54, 76, 79, 142  
PPR  
  *see* post-project review  
presentations 115–116  
prioritization 155  
problems 171  
programme xvi  
progress, monitoring 132, 133, 142  
progress reports 105, 115–116, 142, 150, 161  
project board  
  *see* steering group  
project initiation document 39, 48, 81, 82  
projects  
  failing 183–184  
  fixed date 127–130  
  stopping 169–171, 183–184  
  without budgets 37–40  
project segmentation 132–133  
promotion 163–166  
proof-of-concept stage xvi, 44–45
- quality 41, 50–51, 129, 174  
quality assurance 50, 51  
quality control 50  
quality plan 49–51, 180
- rebaselining 142  
recognition 95, 117–118  
  achieving 164–166  
records  
  archiving 185  
  organizing 157–158  
Reiss, G. 135  
reports  
  financial 16, 20, 23–25, 29  
  peer review 32–33
- post-project review 65  
progress 105, 115–116, 142, 150, 161  
risk 73  
requirements, defining 86–87  
requirements document xvi, 57–59, 142  
resources 41  
  additional 24, 41, 129–130  
  estimating costs 3–4  
  human 16, 21, 29  
  no-budget projects 38–40  
reviews 180  
  documentation 58, 180  
  peer 31–33  
  post-project 64–68  
  quality assurance 51  
rewards 107–108, 117–118  
risk-management plan 74, 75  
risk-mitigation plan 75  
risk log  
  *see* risk register  
risk management 2, 4, 69, 72–76, 142  
risk matrix 70–71  
risk register xvi, 19, 72–74, 181, 183, 187  
  entries in 39, 76, 113, 139, 150  
risk response xvii, 74–75  
risks xvi  
  and contingency 19, 20  
  assessment of 70–71  
  identification 69  
roles  
  of project manager 161–162  
  of sponsor 103–106  
Rothwell, W.J. 174–175
- Salm, G. 70, 74–75  
schedules  
  *see also* critical path analysis xvii, 121  
  and teams 144  
  baseline 140–142  
  changes to 48  
  creating 124–126  
  high level 148, 149  
  quality 51  
Schulte, R. 20  
scope 41  
  changes to 20, 24, 47–48, 58  
  defining 83–87  
  documenting 57–59  
  items to include 43–45, 49–51, 64–68  
  managing 159–162  
scope statement xvii, 65, 85–87, 142  
self-promotion 163–166  
short tasks 131–133  
showstoppers 169–171  
Shrub, A. 132  
signing authority 26–27  
signoff, of documents 61, 75, 126, 180–182  
skills  
  facilitation 172–175  
  organization 154–156  
  soft  
    *see* soft skills  
slippage 132  
Smallman, C. 69

- soft skills
  - see also* commitment; communication; culture; delegation; motivation 100–102
- sponsors xvii, 103–106
- staged projects 43–45, 53, 75, 125–126
- stakeholder analysis xvii, 109–114
- stakeholder management 99, 101, 113–114
- stakeholder mapping
  - see* stakeholder analysis
- stakeholders xvii, 119–120
- standards, quality 50–51
- status reports 116, 150
- steering group xvii, 106
  - and budgets 4
  - and changes 24, 47
- stopping projects 169–171, 183–184
- 'straw man' 85
- subplans 148–150
- subprojects 133
- success criteria xvii, 52–56
- support, from stakeholders 111–113
  
- tasks
  - and critical path analysis 134–137
  - delegating 148–150
  - identifying 131–132, 134–135, 154–155
  - prioritizing 155
  - short 131–133
- team meetings 24–25, 97, 145–147
- teams
  - and budgets 21–25
  - business-as-usual 53, 55, 151, 185
  - closure 117–118
  - commitment of 94–95
  - communicating with 91–93
  - culture 95, 96–97, 101
  - encouraging 107–108
  - managing 89, 100–102
  - momentum 122–123
  - monitoring 143–144
  - multiple 148–150
- telephone calls 155–156
- telephone conferences 146, 147
- testing 43–45, 50, 58
- test scripts xvii, 59
- time
  - see also* critical path analysis; schedules 41
  - constraints 127–130
  - contingency 39
  - estimating 131–132, 142, 144
  - recording 143–144
- time-bound projects 127–130
- timesheets 23, 29, 143–144
- time tolerance 12, 141–142
- tolerances
  - budget 10–13
  - time 12, 141–142
- total quality management (TQM) 174
- tracking
  - benefits 52–56, 152
  - financial 5, 11, 14, 16, 29
  - schedule 142, 148, 150
- Trompenaars, E. 96
- Truss, C. 91
  
- trust 93
  
- understanding, ensuring 92
- users
  - and scope 83–87
  - requirements 57–59
- user testing documentation 59
  
- Van Maurik, J. 175
- version control 60–63, 142, 182
- video conferencing 146–147
- virtual meetings 146–147
  
- web conferencing 146, 147
- White, T. 53
- Woolliams, P. 96
- workstreams xvii, 148–150
- Wright, J.N. 24