

Book Reviews – Set #1: Three brief critiques

By R. Max Wideman, FPMP

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Introduction

We have to confess that for various reasons, including a change in lifestyle, we have not been able to find the time to keep pace with our customary project management reading. This applies particularly to our in-depth critical reviews of technical books that we have undertaken in the past. So, to catch up, we have decided to simplify our approach. We shall no longer highlight the "What we liked" in the books under review, but neither shall we point out the "Downside". Instead we shall briefly describe our general impressions and recommendations.

Books discussed in this Review

- Book 1 An Introduction to Project Management, 3rd & 4th Edition
- Book 2 The Six Sigma Handbook, 3rd Edition
- Book 3 Facilitating Project Performance Improvement

Book 1 An Introduction to Project Management, Fourth Edition, by Kathy Schwalbe, 2012

Introduction

We reviewed the 2nd edition of this book in more detail back in 2009.¹ We are now taking a look at the 3rd Edition. However, author Kathy Schwalbe has recently released her 4th Edition of this book, which is based on the new version of the PMBOK[®] Guide (Fifth Edition).

The 4th Edition is a hefty tome of over 500 pages. It offers a general yet concise introduction to project management with up-to-date information on how good project, program, and portfolio management can help you achieve organizational success. The book generally follows the natural life span of a project and uses the Project Management Institute's Project Management Body of Knowledge Guide ("PMBOK") as its foundation. The text includes over 50 samples of tools and techniques applied to one large project and it also includes brief guides to Microsoft Project and AtTask.

New to the 4th Edition is also a 60-day trial of MatchWare's MindView Business software. This allows you to create a work breakdown structure from a mind map and then easily import it into a Gantt chart. The author has also added a feature called Video Highlights and links to the videos from the free companion Web site at www.intropm.com.

Author Kathy Schwalbe's objective is to provide a comprehensive coverage of project management. This includes references to program management and project portfolio management. Her intent is to teach the subject, including its associated tools and techniques, for practical application in a project environment.

Kathy considers her book is suitable for all majors, including business, engineering, healthcare and more.² As an update, Kathy is working with a co-author, Dan Furlong, to publish a variation of this text

called *An Introduction to Healthcare Project Management*, available in June 2013. She said that several instructors asked her to write this new book, and she was happy to find an excellent co-author and practitioner at the Medical University of South Carolina to help her write it.

About the author

Kathy is a Professor in the Department of Business Administration at Augsburg College in Minneapolis, where she primarily teaches courses in project management and problem solving for business. Before entering academia in 1991, Kathy started out as a project manager in the Air Force and subsequently worked for ten years in industry. So Kathy has the experience to back up her work. She may be reached at schwalbe@augsborg.edu. For more information, visit www.kathyschwalbe.com.

Table of Contents

The content of this book is set out in nine chapters and three Appendices as follows:

1. An Introduction to Project, Program and Portfolio Management
 2. Project, Program and Portfolio Selection
 3. Initiating Projects
 4. Planning Projects, Part I (Project Integration, Scope, Time, and Cost Management)
 5. Project Planning Part II (Project Quality, Human Resources, Communications, Risk, and Procurement Management)
 6. Executing Projects
 7. Monitoring and Controlling Projects
 8. Closing Projects
 9. Best Practices in Project Management
- Appendix A – Brief Guide to Microsoft Project 2010³
Appendix B – Brief Guide to AtTask
Appendix C - Resources

The book has over 500 pages. Each chapter is preceded by a table of Learning Objectives for the chapter and concludes with a Case Study Wrap-up, A Chapter Summary, A Quick multiple-choice Quiz, Discussion Questions, Exercises, Team Projects and a listing of the Key Terms introduced in the preceding chapter. The book also has a complete Glossary of these terms at the end of the book.

General observations and recommendations

This book is a comprehensive and thorough treatise on its subject. It is well written with a good balance between text, tables, charts and illustrations. It is easy to read, though the amount of relatively in-depth content provided may seem overwhelming at times. But remember that the book is intended as a reference companion for an academic course. However, the load is brightened from time to time by the introduction of humorous sketches or comic strips.

The book contains many interesting insights. For example, on "Project Portfolio Selection":

"Projects and programs have existed for a long time, as has some form of project portfolio management. There is no simple process for deciding how to create project portfolios, but the goal of project portfolio management is clear: to help maximize business value to ensure enterprise success. You can measure business value in several ways, such as in market share, profit margins, growth rates, share prices, and customer or

employee satisfaction ratings.

Many factors are involved in ensuring enterprise success. Organizations cannot only pursue projects that have a special financial value. They must also consider resource availability (including people, equipment, and cash); risks that could affect success; and other concerns, such as potential mergers, public relations, balancing investments, and other factors that affect enterprise success."⁴

Another example:

"Some organizations spend a great deal of time and money on training efforts for general project management skills, but after training, a project manager might still not know how to tailor their project management skills to the organization's particular needs. Because of this problem, some organizations develop their own internal project methodologies. The *PMBOK*[®] *Guide* is a **standard** that describes best practices for **what** should be done to manage a project. A **methodology** describes **how** things should be done"⁵

In an early section, Kathy suggests that project managers and their teams must develop their knowledge and skills in the following areas:⁶

- All nine project management (PMBOK) knowledge areas
- The application area (domain, industry, market, etc.)
- The project environment (politics, culture, change management, etc.)
- General management (financial management, strategic planning, etc.)
- Human relations (leadership, motivation, negotiations, etc.)

If you can master all of that, you should be a CEO in no time!

In our opinion, this book provides sound practical advice, and excellent content for the thorough study of its subject.

R. Max Wideman
Fellow, PMI



Book 2 The Six Sigma Handbook, 3rd Edition, Pyzdek & Keller, 2009

Introduction

For those who may not know, Six Sigma is a rigorous, focused, and highly effective implementation of proven quality principles and techniques developed from the work of many well-known quality management pioneers such as Deming and Crosby. It is a philosophy that seeks to apply scientific method to the design and operation of management systems and business processes that enable employees to deliver the greatest value to customers and owners. It is different from the earlier "Three Sigma Performance" in that the former applied only to manufacturing processes, whereas the "Six" variety is applied to all important business processes.

Since project management is an important business process, it is relevant to our interest. However, because the scope of Six Sigma is much broader than that of project management, and its impact more far reaching, it has developed into a virtual cult that champions progressively: "Green Belts and Black Belts" and seeks to influence managers at all levels.

Nevertheless, authors Pyzdek & Keller observe that:⁷

"Despite its name, Six Sigma's magic isn't in statistical or high-tech razzle-dazzle. Six Sigma relies on tried and true methods that have been used for decades. By some measures, Six Sigma discards a great deal of the complexity that characterized Total Quality Management (TQM). Six Sigma takes a handful of proven methods and trains a small cadre of in-house technical leaders, known as Six Sigma Black Belts, to a high level of proficiency in the application of these techniques. To be sure, some of the methods Black Belts use are advanced, including up-to-date computer technology. But the tools are applied within a simple performance improvement model known as Define-Measure-Analyze-Improve-Control, or DMAIC."

About the author

Thomas Pyzdek is a Six Sigma consultant with 30m years experience in the field. He is a recipient of the American Society for Quality (ASQ) Edwards Medal for outstanding contributions to the practice of quality management. Paul Keller is Vice President and senior consultant with Quality America, a Six Sigma Training company. He is also author of *Six Sigma Demystified*.

Table of Contents

The content of this book is set out in twelve chapters and seventeen Appendices as follows:

Part I – Six Sigma Implementation and Management

1. Building the Responsive Six Sigma Organization
2. Recognizing Opportunity (Linking Six Sigma Projects to Strategies)
3. Data-driven Management
4. Maximizing Resources (Choosing the Right Projects)

Part II – Six Sigma Tools and Techniques

5. Project Management (Using DMAIC and DMADV Models)
6. The Define Phase (Project Charters, WBS, Deliverables & Scheduling)
7. The Measure Phase
8. Process Behavior Charts
9. Measurement Systems Evaluation
10. Analyze Phase
11. The Improve/Design Phase
12. Control/Verify Phase

Appendices – These appendices provide detailed information on specific tools, techniques and other aspects of the Six Sigma technical family.

The book has a total of 548 pages and the Appendices include a ***Glossary of Basic Statistical Terms***

General observations and recommendations

While, like project management, the practice of quality management obviously involves the art of people management, it is, and in our view, generally under represented in most projects. For example, how often is "quality grade" recognized as a separate variable independent of "scope" in most projects, but instead buried in some vague notion of "performance", or automatically expected at some unspecified level or standard? Therefore, it is well worth the while for project managers to pay some

attention to the Six Sigma concepts. Indeed, it will be noted that Chapters 2, 4, 5, and 6 of this book pay special attention to the subject of projects associated with Six Sigma initiatives.

Interestingly, this sequence of quality improvement as represented by "Define-Measure-Analyze-Improve-Control" (DMAIC) is not unlike the sequence of the project management process groups: "Initiating-Planning-Executing-Monitoring&Controlling-Closing. However, the application of Six Sigma depends on the availability of sufficient data to work on, something that is not necessarily available on short-term, fast-paced, unique projects. That's because its application is highly dependent upon the science of repetitive data observations and collection, the application of mathematical and statistical techniques, as well as analysis and problem solving.

This book is well illustrated with tables, charts, illustrations and equations. It provides extensive, in-depth coverage of the subject matter. However, many of the pages are heavy with text containing overly long paragraphs, and acronyms whose definitions get lost in early paragraphs. It also includes strange words like "muda" that turns out to mean waste in the value production stream including all types of defective work.⁸ For those without the appropriate background, it represents very heavy reading.

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### **Book 3 Facilitating Project Performance Improvement, Jerry Julian, 2010**

#### ***Introduction***

According to the book's cover sheet, *Facilitating Project Performance Improvement – A Practical Guide to Multi-Level Learning*:<sup>9</sup>

"provides a practical guide to facilitating business transformation and performance improvement for project organizations. It is grounded in cutting-edge research in the fields of project management and organizational learning."

In author Jerry Julian's view:<sup>10</sup>

"In project management, doing 'lessons learned' at the end is simply too late. By that time, there's nothing that can be done to improve your results. The key to maximizing the return on any project is multi-level learning, a continuous improvement approach that draws on lean concepts and tools to optimize communication, establish repeatable processes, and leverage cross-team innovations while projects, programs, and strategies are 'in flight'"

Hence, the author's objective is to get across to middle and senior management, including functional department managers, the idea of gathering lessons learned **during** the various phases of a project, while the information is fresh in people's minds. And this applies especially to program managers and the members of the Program Management Office (if it exists) in companies that engage in a stream of projects as their main line of business. The end purpose is to head off repetitive problems before they start by capturing danger signals and transferring mitigation strategies to other projects in the portfolio or program, to avoid runaway calamities.

### ***About the author***

Jerry Julian is an operations and technology performance improvement strategist and President & CEO of Julian Advisory Group. In writing the book, Jerry clearly has Information Technology and Research and Development companies in mind.

### **Table of Contents**

The content of this book is set out in seven chapters and two Appendices as follows:

Introduction

#### **Part 1: Foundations**

1. The need for Multi-Level Learning
2. Foundations and Principles of Multi-Learning

#### **Part 2: Roles**

3. The Multi-Learning Coach
4. The Project and Program Management Function (PMO)

#### **Part 3: Implementing Multi-Level Learning**

5. Facilitating Level 1: Continuous Project Improvement
6. Facilitating Level 2: Cross-Project Management
7. Facilitating Level 3: Strategic Portfolio Alignment
8. Conclusion

Appendix A: Problems with Traditional "Lessons-Learned" Practices

Appendix B: Situated Learning and Communities of Practice

The book has a total of 208 pages and two Appendices but no Glossary of Terms.

### **General observations and recommendations**

In our opinion, the book is generally well written in a clear style, though for ease of reading a number of paragraphs are longer than we normally like to see. In her Foreword to the book as something of a backdrop, Victoria J, Marsick observes:<sup>11</sup>

"Project teams form a temporary community with a common focus even though members may be spread around the world and often cross professional, functional, and cultural boundaries. Project teams bring people together with diverse backgrounds to achieve shared aims on common tasks under tight timelines – often in collaboration with customers and other stakeholders – in ways that require innovation and knowledge sharing. However, the conditions under which project teams work are challenging and turbulent, and organizations are not always prepared to change the way they work when they become "projectized". Learning in project teams often requires coordination, alignment, and intentionality.<sup>12"</sup>

Jerry Julian's position is that Multi-Level learning is neither just top-down nor bottom-up. It is both, because it focuses on facilitating systematic reflection at three levels: strategies, processes, and projects. In larger organizations, these three levels of learning may also reflect different levels in the organizational hierarchy.<sup>13</sup> Chapters 5, 6 & 7 describe how to carry out the Multi-Level learning in detail. We were impressed by Jerry's arguments in favor of the approach, while we recognize the practical difficulties of inserting the extra work into the hectic environment of project work as described

earlier.

The book includes a limited number of illustrations to clarify the concepts being proposed. It is relatively easy reading and provides good advice for those companies willing to undertake such an endeavor.

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¹ Schwalbe, Kathy, *An Introduction to Project Management*. For our 2nd Edition review see http://maxwideman.com/papers/two_books/intro.htm

² Schwalbe, Kathy, *An Introduction to Project Management*, 4th Edition, published by Kathy Schwalbe, LLC, 2012, abstracted from back cover

³ Note: An update for Project 2013 will be available by mid-2013 from www.intropm.com

⁴ Schwalbe, p59

⁵ Ibid, p79

⁶ Ibid, p18

⁷ Pyzdek, Thomas & Paul Keller, *The Six Sigma Handbook*, 3rd Edition, published by McGraw Hill, 2009, p3

⁸ Ibid, p321. Wasted time, motion, and materials are all **muda**. Muda also includes designing goods and services that don't meet customer's needs. One may conjecture that there is plenty of muda around in project management – it is just that it has not been recognized!

⁹ Julian, Jerry, *Facilitating Project Performance Improvement*, AMACOM, 2010, p1

¹⁰ Ibid, front cover flap

¹¹ Ibid, Foreword, p xiii

¹² In case you don't know, "intentionality" is a philosophical concept defined by the Stanford Encyclopedia of Philosophy as "the power of minds to be about, to represent, or to stand for, things, properties and states of affairs" see <http://www.science.uva.nl/~seop/entries/intentionality/>. The term refers to the ability of the mind to form representations **and has nothing to do with intention**.

¹³ Ibid, p4