

How to Manage Complex Programs
High-Impact Techniques for Handling Project Workflow, Deliverables, and Teams
By Tom Kendrick, PMP
(A book review by R. Max Wideman, FPMI)

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Introduction

This book provides valuable insights for those who have responsibility for managing large-scale programs, i.e. as *program* managers as distinct from *project* managers. These are challenges where many projects are involved together with "other related work" and where so-called other related work is essential but not necessarily projectized. This type of responsibility typically requires careful coordination of the countless distinct actions that constitute the interconnection of all the assembled projects, and sub projects, some of which are often being conducted in far away places.

As the write-up on this book's cover sheet observes:¹

"[This book] delivers exactly what it promises – high-impact techniques for handling project workflow, deliverables, and teams. These techniques will enable you and your program staff to convert large-scale undertakings into collections of smaller, well-managed projects. While the scope will remain complex and layered, the information and techniques presented [in this book] will allow you to manage them coherently and efficiently. These strategies can be applied to any program, [but] are especially well adapted to high-tech undertakings."

And that includes, of course, large-sale information-technology programs. But it assumes, of course, that you also have 100% support from the political masters that are inevitably involved in promoting the venture, and that you brook absolutely no interference in the day-to-day management of same.

Further:²

"Kendrick reveals, in clear, accessible text, amplified by diagrams, graphs, and real-life examples, the fundamental concepts and proven approaches that will help you master program management. Step by step, this book will guide you through controlling the structures and hierarchies that make up a large-scale program, from initiation through execution and finally successful closure.

You'll see how to:

- Break complex deliverables into management chunks;
- Control program scope;
- Develop credible, workable plans that manage workflow dependencies;
- Conduct periodic in-depth plan reviews;
- Establish effective governance;
- Manage diverse stakeholder perspectives and priorities;
- Organize program staff and project leaders into a high-performing team;
- And more."

About the author

Tom Kendrick, PMP, is the program director for Project Management and Agile Management for UC Berkley Extension and a faculty member of the American Management Association. His professional experience includes twenty years with Hewlett-Packard and five years as an internal project management consultant for Visa Inc. He has also directed projects in the United States, Europe, and Asia for General Electric, DuPont, ADP Network Services, and as an independent consultant. He is also the author of several books on project management.

Book Structure

The contents of this book are set out in eight chapters and one appendix as follows:

1. Program Management
 2. Program Initiation
 3. Program Deliverable Management
 4. Program Planning and Organizing
 5. Program Leadership
 6. Program Execution and Control
 7. Program Closure
 8. Conclusion
- Selected Program Management Bibliography

This book has 318 pages but no Glossary of terms. The text is fairly well written and understandable, but our main concern is that quite a number of paragraphs are long (15 to 17 lines) containing as many as eight sentences.³ That makes them difficult to digest, especially for those practicing in this new world of high-speed stress. Or, for that matter, for the younger set who have been brought up on Twitter.

However, the book is well laid out with ample illustrations and bulleted lists to support the concepts being described in the text. In terms of reading, we would describe the book as sound advice in practical and realistic terms, presented at an academic level. Chapters 2 through 6 are by far the largest, ranging from 43 to 59 pages.

In terms of comfortable readership, we suspect that the largest audience would be from the Information Technology Sector, although other project management sectors such as those listed in "*Table 3-2 Program deliverable categories and examples*"⁴ will benefit from studying the book.

What we liked

To capture the interest of casual readers, each chapter of this book is preceded by a quotation, no doubt to jog the mind, such as this one that is very relevant to the subject matter at hand:

"Dividing an elephant in half does not make two small elephants"

Peter Senge, *The Fifth Discipline*.

The definition of "Program" is called out at the very beginning of Chapter 1 by comparing it with the author's definition of a project.⁵ Thus:

"*Projects* are undertakings that are of finite duration and seek to deliver a specific result using limited assigned resources."

As author Tom Kendrick correctly observes: "*Program*" is a term that means different things in different

contexts.⁶ But here Tom prefers to default to the Project Management Institute's definition, namely:

"A *program* is a group of related projects, subprograms, and program activities that are managed in a coordinated way to obtain benefits not available from managing them individually."

Having laid this fundamental groundwork, Tom goes on in Chapter 1 to explore the organizational context for programs, and describe a range of program types and sizes. He then discusses program origins and challenges, and most importantly, explores the dimensions of complexity that programs must face.⁷ As an example, Tom briefly describes the massive NASA space program and concludes that:⁸

"Thousands of contributors worked on the projects that made the program successful. Without a clear division of the program into phases, missions, functions, and detailed projects (not to mention an enormous amount of talent and money), none of what was accomplished would have been even remotely possible."

And finally, "The conflicting needs of dealing with detailed-level complexity and high-level longer-term objectives are what make program management challenging."⁹

If that doesn't whet your appetite, nothing will!

In the same chapter, Tom goes on to describe the rationale for effective limits on project and program size. Such detail is also valuable in analyzing program and project failure. Tom suggests that project management methods do work well, but only up to a point, with the following as useful limits for *project* parameters:¹⁰

- Approximately ten to twelve full-time contributors
- Roughly 6 to 8 months of overall project duration
- About 100 to 200 lowest-level activities in the project work breakdown structure
- Around 100 effort-months of estimated work
- A budget nearing \$1 million

Presumably, more than that calls for the introduction of a program management structure. Naturally, Tom follows this with a brief outline of the life of a program life span consisting simply of: *Program Initiation*, *Program execution* and *Program closure*. What could appear simpler?

Well, it turns out that *Program Complexity* is the real challenge because of the several types of problems that can arise, ranging from the simple to the insolvable, especially relating to program scope. Here, Tom concludes that:¹¹

"Although there are structural similarities between the hierarchy describing program scope and that for program projects, there are many additional complexities associated with understanding workflow and developing a coordinated program plan."

With that and in the next five chapters, Ken's book launches into the meat of its subject by discussing in great detail the program phases as listed earlier, namely: Initiation, Deliverable Management, Planning and Organizing, Leadership, and Execution and Control. Of all of the five chapters, we were very pleased to see that the last chapter is the largest. Too often, books on project management conclude with project planning, leaving the reader high and dry when it comes to actual execution.

Snippets

Author Tom Kendrick's book is too large and too detailed to give fair comment in a limited book review such as this. Instead, we have picked up some valuable pearls of wisdom from each chapter many of

which we feel are not only essential prerequisites to conducting a program but also have broader implications. Here is our selection.

Chapter 2 Program Initiation

- Launching a program of almost any scale benefits from a well-planned startup to ensure that it hits the ground running.¹²
- ...each new program benefits greatly from a clear and compelling business case showing how it contributes value that supports the organization's goals.¹³
- Undertaking a multiyear program to deal with a current situation can be perilous unless the objectives are sufficiently flexible to deal with future realities as they emerge.¹⁴
- For both projects and programs, sponsorship works best when the people involved have a substantial stake in the work.¹⁵
- ... effective program leaders work to identify and connect with all the individuals having sponsorship responsibilities to ensure that they understand their roles and what the program is undertaking.¹⁶
- At the inception of a program, document the expected benefits, and engage in sufficient analysis to build confidence that the efforts will be worthwhile.¹⁷
- Programs decompose the work into component projects to simplify the work and manage risk, but this is only effective when you do a good job of creating a balanced mix of projects having modest size, substantial independence, and reasonable levels of inherent risk.¹⁸

Chapter 3 Program Deliverable Management

- It is always dangerous for any task to have two (or more) owners, because this may result in everyone thinking someone else will take responsibility. [Also,] Multiple owners can result in turf battles, conflicts, and other unpleasantness.¹⁹
- Stakeholder analysis begins with the most influential individuals in the mix, those with sponsorship responsibility for program work.²⁰
- Stakeholders who will be affected by program deliverables must also be part of your analysis.²¹
- Based on the work of Noriaki Kano in Japan in the 1980s, requirements can be thought of as falling into three broad categories: basic, performance, and excitement.²²
- Stakeholder priority conflicts and resolution ... it is rarely possible to make all stakeholders equally happy.²³

Editorial comment: Which suggests that a successful project (or program) is one that makes everyone feels about equally unhappy!

- Characterizing programs ... Two useful distinctions that can help with this are the timing of the deliverables (integrated "big bang" delivery versus incremental "step-by-step delivery) and the type of deliverables (tangible versus intangible).²⁴

The remainder of this chapter discusses, among other things, different types of program road maps, system analysis, scope risks and optimization, documentation, and program change management. It concludes with a valuable list of "Key Ideas for Program Deliverable Management".

Chapter 4 Program Planning and Organizing

- To ensure coherence, it is best to define a consistent life [span] that will be followed by each project in the program. Having a common life [span] provides for effective synchronization of

work undertaken by separate project teams and a foundation for aggregating project plans into useful program-level schedules for analysis and tracking.²⁵

- Program Plan Change Management ... Once a baseline for the next stage of a program work is set, establish a formal process for detailed assessment of any plan changes that are proposed, with a default disposition of "reject" or at least "defer" that ensures that only essential plan changes representing significant, credible value to the program will be accepted.²⁶
- Decomposing a program into a set of projects is one of the sources of complexity that makes program management challenging. Managing this complexity requires reviewing the initial program breakdown structure to explore adjustments that might result in a set of projects that could be more easily managed.²⁷

In the remainder of this chapter, Tom Kendrick goes into great detail on integrating, interface management, workflow risks and documentation. The chapter concludes with a list of "Key Ideas for Program Planning and Organizing".²⁸

More snippets

Chapter 5 Program Leadership

- Getting a large community of people heading in the same direction starts with a clear definition and vision of what is to be accomplished.²⁹
- At the program level, you will need a staff of skilled and competent contributors who can assume responsibility for organizing and leading the work and for performing the functions of a program management office (PMO) (whether or not that terminology is used).³⁰
- Major programs rely on a hierarchy of teams and leaders. Organizing all the contributors into aligned project teams that can operate smoothly is crucial to good program management.³¹
- Managing large-scale staffing and a significant budget carries a good deal of risk; so good program management also depends on identifying, assessing, and managing program resource risks.³²
- Governance and Stakeholder Expectations ... The larger the program, the more likely that its inception depends on a single, powerful, often visionary, individual.³³
- Decision processes that strive for consensus (or at least some level of cooperative buy-in) from all important players serve programs much better than those that rely primarily on a small cabal of decision makers who drive program decisions with minimal input from the people their decisions will be inflicted upon.³⁴

Again, the remainder of this chapter goes into considerable detail and ends with a useful list of "Key Ideas for Program Leadership".³⁵

Chapter 6 Program Execution and Control

As mentioned earlier, this is the longest chapter of all. It follows a logical path through such topics as: Sponsor and Stakeholder Expectations Management, Program Metrics, Status Tracking, Reporting and Information Management, Controlling Scope, and so on. However, we have a couple of comments we think are worth noting.

This chapter, like previous chapters starts out with a quote, thus:

"In preparing for battle, I have always found that plans are useless, but planning is indispensable"

Dwight D. Eisenhower³⁶

"Even if you do an outstanding job of program planning, you will inevitably encounter surprises, problems, and other issues. It is also true, however, that with systematic analysis you will encounter fewer unexpected events than you would with less planning. Lowering the stress, even a little bit, can make a good deal of difference when leading a major program."³⁷

Similar to previous chapters, this chapter ends with a list of ten bullets under the heading: "Key Ideas for Program Execution and Control".

Chapter 7 Program Closure

"Begin at the beginning," the King said gravely, "and go on till you come to the end; then stop."

Lewis Carroll, *Alice's Adventures in Wonderland*³⁸

How appropriate that is. Many are the programs that do not know how to stop! In a few short pages, Tom Kendrick tells you exactly how.

Downside

If there is any downside to this book, it is that managing a large, complex, and risk-ridden program is clearly not for the faint of heart. Where you can study the essentials of managing a large-scale program, and experience the practical nuances of doing so, is an open question.

Summary/Conclusion

We very much enjoyed reviewing this book. And while we have not had the benefit of experiencing the challenges of managing a large-scale **program** (as distinct from managing a large scale **project**), nevertheless much of the advice in the book came across as very recognizable and realistic.

R. Max Wideman
Fellow, PMI

¹ Kendrick, Tom, PMP, *How to Manage Complex Programs*: published by www.amacombooks.org USA, 2016, Book front-cover sheet.

² Ibid, back-cover sheet

³ Ibid, See for example on pages 29-30, 84 and 113, etc.

⁴ Ibid, p91

⁵ Ibid, p4

⁶ Ibid

⁷ Ibid, p3

⁸ Ibid, pp5-6

⁹ Ibid, p7

¹⁰ Ibid, p11

¹¹ Ibid, p19

¹² Ibid, p23

¹³ Ibid, p25

¹⁴ Ibid, p26

¹⁵ Ibid, p28

16 Ibid
17 Ibid, p34
18 Ibid, p51
19 Ibid, p81
20 Ibid, p82
21 Ibid, p83
22 Ibid, p85
23 Ibid, p88
24 Ibid, p90
25 Ibid, p131
26 Ibid, p133
27 Ibid, p142
28 Ibid, p180
29 Ibid, p183
30 Ibid
31 Ibid
32 Ibid
33 Ibid, p184
34 Ibid, p187
35 Ibid, p225
36 Ibid, p229
37 Ibid
38 Ibid, p291