

**The Essentials of Project Management, 4<sup>th</sup> Edition**  
**By Dennis Lock**  
**(Review by R. Max Wideman, FPPI)**

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### ***Introduction***

Author Dennis Lock is no stranger to these pages. In past years we have published reviews of several of his books including in particular: *Project Management Tenth Edition*.<sup>1</sup> We mention this book in particular because as Dennis says in his Preface:

"The first edition of this book resulted from a suggestion from Gower<sup>2</sup> that I might produce a précis of my larger work, *Project Management*. This recognized that not all students and practicing project managers needed the comprehensive coverage of the larger work.

I have always been aware of the need to keep this book of *Essentials* in step with its mother text and other project management development. So this fourth edition is the junior complement to the tenth edition of *Project Management*, which was published in 2013. It is intended for practising managers, and for students where project management is one module in their degree syllabus."

Further, Dennis concludes his Preface with these words:

"I am always grateful to serious reviewers and I am particular indebted this time to Max Wideman for reviewing two of my other recent books thoroughly and sympathetically. His comments on those works led me to make some corrections in this revised text."

Thank you Dennis for this public recognition, which is much appreciated.

But with such an accolade in public print, I must now be careful to avoid any suggestion of collegial back scratching, whether good or otherwise. So this time, contrary to usual practice, we'll skip the "What we liked" and "Downside" sections and simply make comment on a few items that we found of particular interest.

The target audience for this work is, of course, anyone who is interested or already involved in serious project management of whatever area of application. Even those whose primary interest is in pursuing an "Agile" approach, mainly in Information Technology projects, will find a lot to learn from the book's broad but lightly-handled coverage.

This book is well written in a clear style. The text is augmented with ample diagrams, figures and tables to ensure the reader's understanding and thus makes for easy reading. True that the text is a digest of a much larger work and might therefore be classified as "Introductory", nevertheless it provides sound basic advice across a whole range of project management art.

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

Dennis Lock is a freelance writer who specializes in project management. His wide industrial experience has included successful management positions in sub-miniature electronics, defence systems, heavy

engineering and international mining. He has fulfilled consultancy assignments in Britain and over seas, and in more recent years has taught project management to masters degree students as an external lecturer at two British universities. Dennis is a Fellow of APM, Fellow of the Institute of Management Services and a Member of the Chartered Management Institute. He has written or edited over 60 management books, mostly for Gower Publishing Limited.

## **Book Structure**

The content of this book is set out in thirteen chapters and one Appendix as follows:

Preface

1. Introduction to Projects and their Management
2. Defining the Project Task
3. Estimating the Project Costs
4. Managing Risk
5. Organizing the Project
6. Work Breakdown Structures
7. Planning the Timescale
8. Scheduling Project Resources
9. Implementing the Project Plan
10. Managing Purchasing
11. Managing Changes
12. Managing Costs
13. Corporate Managers' Support for the Project Manager

Selected Bibliography

The book has a total of 213 pages and the Appendix provides a useful and wide-ranging set of references but the book does not include a Glossary of Terms.

An important observation about this book in general is that the majority of the author's background has been with organizations that buy-in product development services under contract. That is to say, projects are executed by contractors. Thus the author is comfortable using the word "contractor" to refer to the performing organization, even though that "performing organization" is simply a group of people drawn from the organization's internal resources. Here is what Dennis has to say about this organizational arrangement:<sup>3</sup>

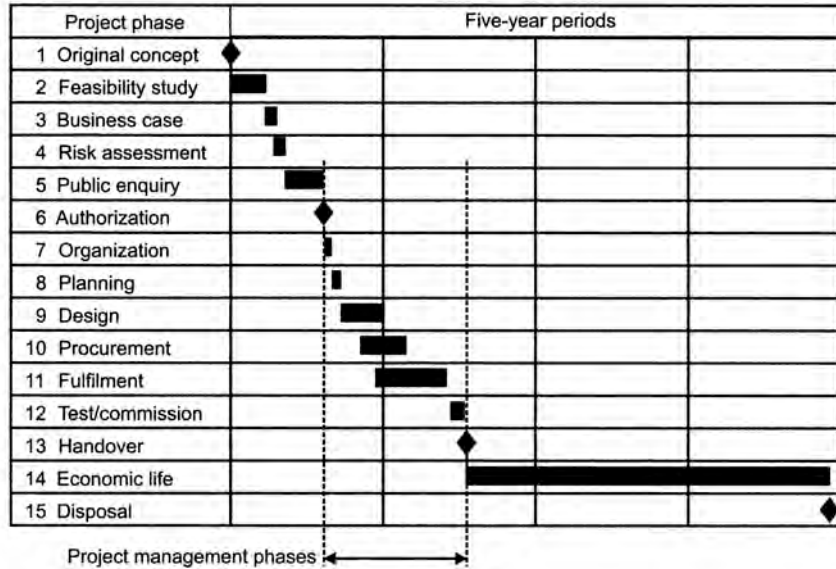
"Many projects are carried out by a contractor for an external organization (the customer). The customer and contract agree terms and prices in a contract. However, this arrangement is clouded for some management change projects, where much of the work is conducted by employees of the organization itself. Then the organization is both contractor and its own customer. For simplicity, I shall use the term contractor throughout this book to describe whoever carries out the project work and customer to describe the owner of the project, regardless of whether the customer and contractor reside in the same organization."

This strategy by the author certainly simplifies the contents of the book. Unfortunately, where projects are conducted "in-house", typically the staff is on the corporate pay role and their time is not specifically allocated to projects but rather to other headings of more interest to corporate finance. Hence, gathering project production cost data is not seen as a necessity and consequently not seen as a constraint on the work, as it is when the work is done under contract.

Perhaps that is why *Agile* Project Management is so popular, and more appropriate, for in-house project work, especially where information technology is concerned.

**Pearls of Wisdom – In general**

It is said, "A picture is worth a thousand words". This figure comes close:<sup>4</sup>



**Figure 1: Typical life cycle (life history) of a large project**

Note that this is a large project covering an eight-year period, and in the author's mind "Project Management" is called up only over a short period between milestone: "6 Authorization" and milestone: "13 Handover". This stance is not unusual. However, the "Project" itself starts at milestone "1 Original Concept". That's when serious money starts flowing, and those expenditures may well be capitalized as a part of the project cost, at least partially.

If this is true, then shouldn't activities 2 through 5 also be "project managed"?

Indeed, the author cites the case of implementing large-scale organizational change initiatives, where staff resist change, have concerns over possible redundancies, or simply resent coping with the teething problems that inevitably arise. But as Dennis observes:<sup>5</sup>

"In recent years these difficulties have led to new ways of assessing and managing the benefits realization of management of change and IT projects. It is now recognized that the benefits realization process should start during early project definition by establishing benchmarks that can be put in place in the business plan. These benchmarks have some similarity with the milestones set in the project execution plans of all projects, but for management change and IT projects there are two important differences:

1. The most important benchmarks often occur some time after initial handover . . .
2. Each benchmark must be directly associated with a cash inflow, cost saving or other real benefit that can be tracked to a favorable entry in the company's accounts or management reports."

There's nothing like optimism! What if the project is an "enabler" project, just one steppingstone on the

way to a larger end goal? Or maybe it is a part of a group of projects that are all necessary for the whole system to work. Who is to say what benefit is attributable to which project? Besides, who is collecting that kind of data in the first place? Collection of benefits data and allocation to corresponding projects is fraught with difficulties.

In this book, Dennis postulates four main project types:<sup>6</sup>

1. Civil engineering, construction, petrochemical, mining and quarrying projects
2. Manufacturing projects
3. Management and business change projects
4. Scientific research projects

Each type is described in some detail. However, the author warns the reader that: "This book is generally concerned with projects that can be defined, as described in the [descriptions of the] first three categories listed."<sup>7</sup>

### **Pearls of wisdom – Specific techniques**

The technique of Work Breakdown Structures (WBS) is probably one of the most important in project management. Dennis describes the WBS Concept, suggests alternative patterns, and provides examples in easily understood terms, together with logical coding systems for larger projects.<sup>8</sup> The WBS is the prerequisite to satisfactory Planning and Scheduling.

As an example of poor time scaling, he observes:<sup>9</sup>

"Whenever any job has to be finished within a time deadline, it is advisable to have some idea of the relationship between the time needed and the time available. This is true for any project, whether a dinner is being prepared, or a motorway constructed. In the first case one would be ill advised to tell guests 'Dinner is at seven – but the potatoes will not be ready until 7:30.'"

Estimating, essentially for costing and scheduling in the course of planning and scheduling, is generally accepted as a fundamental skill for acceptable project management. Where this is not the case, and cost and time estimating take a back seat on a project, it may be claimed that what is going on is not project management at all, but rather *product development* management. This situation is most prevalent in the case of in-house projects for the reasons mentioned earlier.

Dennis devotes several chapters to these and related topics of estimating, but first he takes aim directly at estimators and their skills. As he says: "Project cost estimating, particularly for labour times, is not an exact science."<sup>10</sup> Consequently there tends to be "Optimistic Estimators; Pessimistic Estimators; and Inconsistent Estimators."<sup>11</sup> Conceptually, "There is a possibility of finding a person capable of providing estimates that prove to be consistently accurate. This possibility is so remote that it can almost be discounted."<sup>12</sup> Bottom line; know your estimators' strengths and weaknesses.

But estimating on a project is not a full time activity, so where should these expert folks reside? Dennis has the answer of course. As he says:<sup>13</sup>

"Unless the organization is too small to support the additional expense, it makes sense to set up a central project management support or project services group, usually called a project management office.

This is staffed with people (not too many!) who are capable of the day-to-day chores of planning; resource scheduling, cost estimating, work progressing, cost and progress reporting and general supervision of the company's project management computer applications."

On the subject of Managing Risk, Dennis opens this chapter with the observation: "Everything we do, from getting out of bed in the morning to returning there at night, carries risk."<sup>14</sup> He might have added that there is also a risk of being in bed, but let's not go there. Projects are susceptible to particular risks that Dennis then describes in general terms, followed by the current standard approach to Managing Risks in projects.<sup>15</sup>

It is not until Chapter 9, however, that we get to actually "Implementing the Project Plan".<sup>16</sup> Hopefully all of the likely problems have been anticipated by this time, but not necessarily. As Dennis observes:<sup>17</sup>

"Even when a clear technical specification has been prepared [How many times is that?!] there are often many loose ends to be tied up before actual work can start. The extent and nature of these preliminary activities naturally depend on the type and size of project."

Nevertheless, problems will be encountered, especially those that require fast action and innovative solutions. Hopefully, the project manager will take the time to write up the challenge, the adopted solution, and report the resulting success. And even more hopefully, this report will find its way into the project's final "Lessons Learned" report. However, such reports are rarely couched in terms that are useful to project managers on subsequent projects – even assuming that these reports are pulled out and studied.

Dennis Lock is a great man for Checklists, checklists that cover anything and everything that is likely to be repetitive, checklists that list a set of relevant questions and imply the answers that will pre-empt information requirements. What better place then for aggregating Lessons Learned, suitably converted into Q&As, and adding them to the relevant checklist, e.g., Project Startup, "so that lessons learned on each project are remembered and put to use on projects that follow?"<sup>18</sup>

## Summary

As we have attempted to show, Dennis Lock's book *The Essentials of Project Management* does indeed cover the Essentials of Project Management. As well as the copious illustrations, the text is also helped along with many short case examples taken from every day life. It does all this in a way that will be enlightening to the new comer as much as a useful memory jogger for those practicing project managers with experience but who need a helpful reminder from time to time.

In short, the book is full of good advice and is well worth keeping close by on the bookshelf.

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<sup>1</sup> Lock, Dennis, *Project Management Tenth Edition*, Gower Publishing Ltd, Surrey, England, 2013; *Naked Project Management, the Bare Facts*, (ditto, 2013); and *Handbook of People in Project Management*, (ditto, 2013).

<sup>2</sup> Gower is the publisher

<sup>3</sup> Lock, Dennis, *The Essentials of Project Management Fourth Edition*, Gower Publishing Ltd, Surrey, England, 2014, p3

<sup>4</sup> Ibid, p5, Figure 1.2 in the book

<sup>5</sup> Ibid, p11

<sup>6</sup> Ibid, p2

<sup>7</sup> Ibid, p3

<sup>8</sup> Ibid, Chapter 6 pp67-81

<sup>9</sup> Ibid, 84

<sup>10</sup> Ibid, p35

<sup>11</sup> Ibid, pp35-36

<sup>12</sup> Ibid, p36

<sup>13</sup> Ibid, p65

<sup>14</sup> Ibid, p44

<sup>15</sup> Ibid, Chapter 4, pp43-50

<sup>16</sup> This observation is not intended to be derogatory. Many books on project management deal only with the planning of same, and never get to advice on actually managing the work.

<sup>17</sup> Ibid, 124

<sup>18</sup> Ibid, p128