

Project Management for Mere Mortals

By Claudia M. Baca

(A book review by R. Max Wideman)

Introduction

Claudia M. Baca, PMP, is an independent project management consultant with over twenty years of experience in the information technology, telecommunications and E-commerce industries. During this time she has managed multiple mission-critical projects for organizations as varied as a major telecommunications company to an Internet start-up company. She was also a member of the leadership team working on the Project Management Institute's Organizational Project Management Maturity Model (OPM3). Claudia has also written extensively contributing to books, papers and guides.

The style of the content of this book: *Project Management for Mere Mortals*¹ is interesting. It is written in narrative form rather than prescriptive and, at nearly 500 pages, goes into great detail. For those who like this style of learning, it is addressed to you personally. The book has a good storyboard case study worked through in great detail to illustrate the various concepts and ideas portrayed in the main text of each chapter.

As Kim Heldman² observes in her Foreword:

"Each project starts with an idea, a plan is developed to describe the work, and then it's carried out to fulfill the objective of the project. Along the way, the work is monitored and, when things stray, action is taken to bring the work back into compliance with the plan. The project management processes themselves are very similar, no matter what professions you work; of course the actual work that's performed varies from project to project and among industry areas."³

In other words, while project management is similar across most areas of application, managing the work to produce the product can be very different. And since project management cannot exist in a vacuum, i.e. without the context of a product, Claudia's solid background necessarily provides the backdrop for her current book. That is, readers from the information and corporate administration project industries will be most comfortable with Claudia's discourse and examples.

So, notwithstanding the importance of the "people" element in project management, the amount of time that Claudia recommends the project manager should devote to "relationships" may be unrealistic. For this reason, some readers may have difficulty in translating this work for use on an actual project. Nevertheless, Claudia has managed to tie the two main so-called facilitating functions of the Project Management Institute's Project Management Body of Knowledge ("PMBOK"), i.e. "people" and "communications", to the core topics of scope, quality, time, cost and risk, in a very interesting way. Every single chapter includes two standard section headings titled "Teaming" and "Politics". These two headings provide the opportunity to discuss people and communications with specific reference to the topic of the chapter in projects of high social intensity.

So, those managing projects that involve a relatively large number of stakeholders, and that place a premium on intellectual skills, will find this book most useful. In contrast we suggest that those involved in large projects involving extensive trade work will find it less interesting, notwithstanding the book's attempts at universal application. But then, the PMBOK® Guide itself is more of a vehicle to a qualification than a universal project management modus operandi.

We do wish project management book covers would make the context of the book's content clear for the benefit of unsuspecting book buyers. For a commentator to suggest that: "[the book] is a must read for all project managers with responsibilities for large or small projects *regardless of industry or product*"⁴ (emphasis added) is simply not helpful and could be damaging to the author's market reputation.

Book Structure

Project Management for Mere Mortals contains topics in fourteen chapters that generally follow the standard process pattern of planning activities, executing, monitoring, controlling, and closing.⁵ The chapters are as follows:

1. Setting the Project Management Context
 2. You've Been Assigned a Project!
 3. How Big is This Project?
 4. Laying Out the Work
 5. The Art of Estimating
 6. Quality – How Good Does It Have to Be?
 7. Communication – What Do You Think About My Project?
 8. Risk – What Should You Worry About?
 9. Creating the Schedule
 10. Budgeting – How Much?
 11. The Rhythm of Project Execution
 12. Keeping the Project on Track
 13. Controlling Changes
 14. Success! – Closing the Project
- Answers to the Review Questions
Glossary
Bibliography

Every chapter has five standard sections: Teaming, Politics, Summary, Case Study, and Review Questions. As noted earlier, the two sections: *Teaming* and *Politics* provide the opportunity to discuss people and communications issues relevant to the subject of the chapter. This is a valuable strategy in the book's structure since the subject of "Human Resources" and "Communications" are so often treated in complete isolation.

The Chapter headings are not always particularly descriptive of the chapter contents. For example: *Chapter 2, You've Been Assigned a Project!* covers "Chartering the Project" and a concept titled "Measures of Performance" (MOP).⁶ An MOP is defined in the Glossary as "A measurable business result that is the objective of a project. A Measure of Performance consists of a driver and restrictions." A *driver* is defined as: "A single statement that describes the business result that must be achieved. It is always in measurable terms. It does not describe the activities of the work; it sticks to the result or outcome of the work." A restriction is defined as "A boundary you will need to work within to succeed."⁷

We found this MOP concept particularly interesting because it appears to be in close alignment with our description of a Key Success Indicator⁸ that we have been advocating for projects since 1997. We prefer our KSI label of course because it speaks to project success, whereas MOP refers to "performance" that could mean any of the project's meeting its time and cost targets, or the functionality of the product of

the project, or the business benefits achieved through the use of the product.

Another example of surprising content is *Chapter 3, How Big is This Project*. This chapter covers "Defining the Scope; Product Requirements; Creating the WBS; and Desk Testing." *Desk Testing* is the name used by the author to conduct "a human test of the work so far, to guarantee that you are still in the scope that you defined. This verification should be done at the end of every level of decomposition that you complete."⁹

The titles of subsequent chapters are more self-explanatory. You can pick and choose chapters to read out of sequence, but the book makes more sense if it is read sequentially. This is particularly true if you want to follow the twists and turns of the case study storyboard.

This book is well illustrated with frequent diagrams, tables and templates.

What we liked

Chapter 1 starts out with a good discussion of project management "Concepts" in which project, project management, the project manager's role, the hierarchy of project management, organizational structures, and the project life span, are all discussed in very clear terms. For example a project is defined as "basically a unique endeavor that has a beginning and an end."¹⁰ Can't argue with that, but as we all know, it's the bit in the middle that is the problem!

And what a problem it is. The project manager's role is illustrated by the charming graphic shown in Figure 1. Guess we don't yet have an icon to show a cell phone!

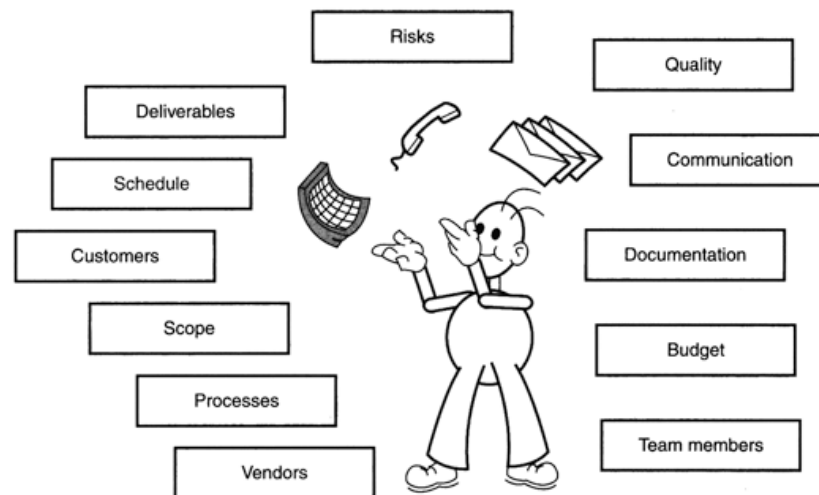


Figure 1: The elements of project management¹¹

The hierarchy of project management lists in descending order: organizational strategy, Portfolio, program, and project. While all four are explained, together with PMO (that may stand for anything somewhere in between), the rest of the book covers only the workings of a single project.

The Project Management Life Cycle is well explained as follows:

"The PMBOK® Guide describes five key process groups that govern the work of project management: initiating, planning, executing, monitoring and controlling, and closing.

These processes have a natural progression inherent in the work, and they must be used in conjunction with a life cycle that covers the phases of the project. The life cycle you choose should reflect the type of work being performed."¹²

It is nice to see an author who has got it so clear and so right. However, Claudia might have added that the project life span that you do choose should reflect the control needs of the performing organization – especially if project portfolio management is involved.

The project management "technical" content, i.e. examples associated with creating a WBS, estimating, scheduling, risk and so on, are generally illustrated by a project whose preliminary scope objective is described as follows:¹³

"To provide a customer service training class that is faster than today's three-month class.

The Measure of Performance for this project is:

Driver: Reduce customer service representative training time by more than 50%

Restriction: Customer complaints do not increase more than 2%

Deliverables:

- Current state documentation
- Training time reduction approach documentation
- Customer service representative training reduced by more than 50%"

The examples and sample templates provided are worked in considerable detail and will be particularly useful for the novice reader.

The case study that we mentioned on the previous page is about a lady named Chris Williams who is suddenly assigned to a critical project by none other than the organization's CEO herself. Of course, the project is large, large enough to encompass all the things that the book needs to illustrate. Chris is new to the organization but she has a long list of lessons learned acquired from the successful management of a lot of smaller projects. Her new project is to manage the launch event of a new subsidiary company's web site and its catalogue product line at a world trade show.¹⁴ Technically, this project is in a different category from her previous IT work, but practically it falls into the same genre as an IT project.

It turns out that Chris Williams is an impossible paragon of project management virtue. As well as planning the project, Chris manages the education and expectations of her boss, and holds regular one-on-one meetings with her various critical project stakeholders. These stakeholders are broken down into Champions, whom you need to get to know personally; Influencers, whom you apparently need to shower with information; and Challengers, whom you need to get to know by seeking them out.¹⁵ Each of these groups also has special communications requirements.¹⁶ In Chapter 7 on Communications we learn that you must also get to know the "Recipients" of your project's product. As Claudia admonishes us: "Just make sure you do your homework and really understand how these people work."¹⁷ That alone could be a full time job.

Of course Chris dutifully holds regular project progress meetings, coaches her team members, and spends time on the detailed workup of required project management tools and techniques. Because of the nature of the project, we find that Chris also has to manage the corporate rumor mill, the solution to which is to make sure "you finish according to the triple constraints."¹⁸

The project lasts for around nine months,¹⁹ and on important occasions, we learn that Chris gets to the office at 6 a.m.²⁰ In all, we estimate that Chris must work at least forty-eight hours a day (well, we did say she is an impossible paragon of virtue.) We would not be a bit surprised to learn that Chris was

completely burned out by the start of the day at 8 a.m.

In point of fact, the final tradeshow event did not go quite as well as it might have. Still, the CEO seemed to be well pleased because no sooner than Chris had returned to her desk the day after the end of the project, she received the following message:²¹

"Since you've done such a phenomenal job with this launch, let's start talking about your next assignment. Come see me tomorrow afternoon."

Apparently, Chris knew that this is the price you pay for being good at what you do, and perhaps this is a good time to broach the subject of a pay raise? Well, we can genuinely say – you bet it is!

Downside

In a book as large and as detailed as this, it should not be difficult to find "points of departure". So it is that we have a few nitpicks.

First and foremost, we were disappointed to see the reference to "triple constraint" right there in the Preface even.²² This obsolete construct has, unfortunately it seems, become institutionalized. Not only is it inaccurate but also implies a lack of basic understanding of project management on the part of the user. For those not familiar with the argument, there are four interdependent variables fundamental to project management, namely: Scope, Quality, Time, and Cost. From a systems perspective, the scope of the product, together with the required quality grade, establish the "requirements" input. As a consequence of applying project management tools and techniques, together with the work required by the particular technology to create the product, a certain amount of Time is required that in turn gives rise to consequent Costs.

Obviously, you can increase both time and cost simply by conducting the work inefficiently. However, assuming an acceptable standard of efficiency, then you can only reduce the Time and Cost components by reducing the Scope and Quality components. You can tinker with the relation between the Time *duration* at an *increase* of Cost, by applying more resources or working overtime and so on, but the effect is limited and marginal at best. We like to think of the interrelationship between the four interdependent variables as the Tetrad-Tradeoff.²³

It is true that author Claudia Baca introduces yet another variation. Her triangle is labeled: Cost, Time and *MOP*, see Figure 2.

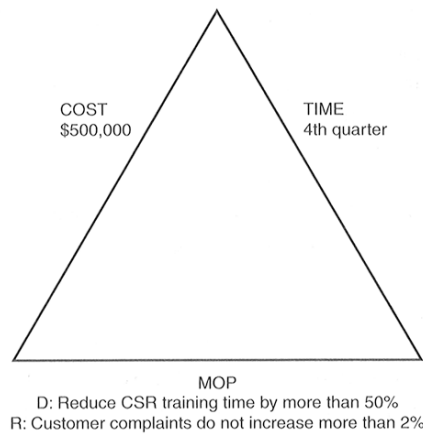


Figure 2: The triple constraints using MOPs²⁴

This arrangement leaves us really scratching our heads because the results represented by an "MOP" are not evident until the product is put into use by a third party after the project is completed. Hence the MOP is dependent upon the competence and dedication of the third party and so is only indirectly related to the time or cost of the project.²⁵

In the discussion of "Influencers" under Politics I Chapter 3 on *How Big is This Project?* Claudia suggests that: "Your strategy with influencers is to shower them with information about the project."²⁶ We have several difficulties with this. First, gathering the information and presenting it in a form suited to public consumption takes time and effort; You don't always know the right information at a given point in time on the project; You might have to modify the scope anyway, down the line so the early information may come back to bite you; and finally undue "snowing the public with information" can result in as much public reaction and cynicism as undue secrecy.

In the Politics of handling executives, we learn that we no longer *escalate* issues but instead we "delegate up".²⁷ Isn't that a bit of an oxymoron?

In Chapter 5, *The Art of Estimating* we really enjoyed the discussion of Time Spent versus Time Duration and the distinction between the two. According to the example:

"You start the assignment on Monday at 8 a.m. You work until 10 a.m. and then take a 30-minute break for coffee and for returning e-mail. You start again at 10:30 a.m. and work until noon, when you stop for lunch . . . [and so on]"²⁸

Aside from being so lucky, the outcome of this discourse is a work calculation that results in 11.5 hours of work effort, i.e. time charged to the project, in a total of two days, i.e. sixteen hours. What we'd like to know is – who pays for the other 4.5 hours, or where is it accounted for?

We have a little difficulty with Chapter 6, *Quality – How Good Does It Have to Be?* Here we see that "You translate the word *expectations* to the word *quality*."²⁹ That seems to be a bit over generalized. The customer may be expecting a certain functionality. If it is missing and the customer is disappointed, that is not a problem of quality grade but of lack of scope. Under *Organization Standards* we see that *Product standards* "cover how the product of the project is created."³⁰ Certainly, poor quality workmanship will likely lead to a poor quality product. However, good workmanship does not necessarily produce "the right product that satisfies the objectives for which the project was undertaken", which is the question asked under *Planning Quality In*.³¹

Chapter 8 is about *Risk – What Should You Worry About?* This chapter provides a good overview of the subject. However, to compare risks the text says: "you need to determine which risks you will work on. You do that by adding up the probability and impact numbers you've generated."³² While adding is feasible, because probability and impact are two different dimension, it is usual to multiply them together rather than adding.³³ The result is a *Risk Criterion Value* that produces a more evident segregation.

On budgeting, Chapter 10, Claudia very wisely recommends pressing for two types of Reserve: a Project Reserve (i.e. a project manager's Contingency allowance) and a Managerial Reserve (i.e. only at the disposal of the project executives.) "The managerial reserve is used for risks that are unknown", e.g. for major emergencies such as a fire in the workplace.³⁴ We think this reserve should also cover the inevitable scope changes required during the course of the project.

In Reconciling the Budget, it is suggested that "It is usually cheaper to use an employee than to use a contractor."³⁵ Perhaps on paper, but otherwise we beg to differ. Circumstance vary of course, but contract employees on average work more efficiently (otherwise they would not be hired); they charge only for productive hours (where did that 4.5 hours get charged that we talked about earlier?); and they have access to more and better solutions through the experience of their home office.

Under Monitoring and Controlling Variance, in Chapter 12, Keeping the Project on Track, we "learn about gathering performance information *during* your status meetings."³⁶ (Emphasis added.) We sincerely believe that this should not be the case. Status information should be submitted *before* the meeting, duly analyzed and only unsatisfactory results discussed at the meeting. Moreover, the meeting should not be about status, i.e. past accomplishments, but about intended progress in the next reporting cycle, and what needs to be coordinated to achieve a set of short-term goals in this period. In fact, a better name for the meeting is "Project Progress Meeting".

As to gathering "How much work (hours or days) has been completed on the task?"³⁷ for purposes of calculating Earned Value, this should be determined on the basis of an objective assessment of accomplishment and not on time spent or cost incurred. To illustrate the Earned Value Technique, the rental of a backhoe, presumably to dig a hole, is used. We are told that "The earned value at the end of day 5 was \$3,200: That was the value of the work accomplished up to that point in time."³⁸ Well, maybe it was or maybe it wasn't because the amount quoted was the amount *charged*. We don't know how much of the hole was dug, how well it was dug or even whether it was in the right place!

Summary

This book, *Project Management for Mere Mortals*, is designed to support practitioners who are new (or almost new) to project management, as well as experienced project managers who want to handle complex projects and organizational politics more effectively.

To this end, author Claudia Baca walks you through the five process groups of the Project Management Institute's: Initiation, Planning, Execution, Controlling, and Closing. Claudia examines each step from the perspective of the working project manager or team member, and goes into considerable detail over the tools and techniques relevant to each. In addition, she highlights the teaming and political issues you could encounter along the way and how to resolve them based on her experience.

Accordingly, you will learn how to:³⁹

- Scope projects and build workable timetables
- Create budgets and use them to manage your project
- Organize efficient work assignments
- Build project teams, and keep them motivated
- Determine quality goals, and decide "how good it has to be"
- Identify and mitigate potential risks to your project
- Control changes and stay on track
- Close projects successfully, and
- Capture and learn lessons for future projects

This book should prove particularly interesting and valuable to those in the information and corporate administration project industries.

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Fellow, PMI

¹ Baca, Claudia M., *Project Management for Mere Mortals*, Addison Wesley, NY, 2007

² Heldman, K., author of PMP® *Project Management Study Guide*, see <http://www.maxwideman.com/papers/studyguide/intro.htm>

³ *Project Management for Mere Mortals*, p xv

⁴ Ibid, reviewer's comment, back cover

⁵ Ibid, p xix

⁶ Ibid, p24. This MOP concept is attributed to Wendi Peck and Dr. Bill Casey of Executive Leadership Group, Inc. reference Chapter 92 of *Business Driven Information Technology: Answers to 100 Critical Questions for Every Manager*, Stanford Press 2003.)

⁷ Ibid, Glossary pp 472-475

⁸ In 1997 we developed a Project Management Information System (PMIS) for a client and the PMIS included an "indicator" that we called *Key Success Indicator* (KSI). The objective was to shift the project focus away from just "On time, on budget" to the business results of the project. We defined KSIs as: "Those project management indicators that: Are determined at the beginning of the project and listed in order of priority; Reflect directly on the key objectives of the project, and Provide the basis for project management trade-off decisions during the course of the project. And, after completion of the project: Are most likely to result in acceptance of the project and its product by the project's stakeholders as being successful in terms of customer satisfaction, and Can be measured in some way, at some time, on some scale." Ref: http://www.maxwideman.com/pmglossary/PMG_K00.htm#KSI

⁹ *Project Management for Mere Mortals*, p90

¹⁰ Ibid, p2

¹¹ Ibid, p4

¹² Ibid, p11

¹³ Ibid p59

¹⁴ Ibid, p16

¹⁵ Ibid, p93

¹⁶ Ibid, p236

¹⁷ Ibid, p231. This statement is followed by Table 7.9 that is a five-page general description, pages 231 to 235, and the advice: "Now you really need to get down to the fine details" on p236. This is further elaborated by specific details shown in Table 7.10, pages 237 to 242.

¹⁸ Ibid, p415

¹⁹ Ibid, p149

²⁰ Ibid, p415

²¹ Ibid, p456

²² Ibid p xvii

²³ See Musings: Triangles, Sex and Simplicity for an explanation of the "Triple Constraint", <http://www.maxwideman.com/musings/irontriangle.htm>

²⁴ *Project Management for Mere Mortals*, p28

²⁵ For an explanation of the labels in the Figure 2, refer to " The project management 'technical' content" description under "What we liked"

²⁶ Ibid, p93

²⁷ Ibid, p123

²⁸ Ibid, p133-4

²⁹ Ibid, p171

³⁰ Ibid, p172

³¹ Ibid, p174

³² Ibid, p270

³³ See *Guide to the Project Management Body of Knowledge*, Fourth Edition, Project Management Institute, PA, Figure 11-10, p292

³⁴ *Project Management for Mere Mortals*, p344-6

³⁵ Ibid, p347

³⁶ Ibid, p398

³⁷ Ibid p399

³⁸ Ibid, p403

³⁹ Abstracted from the back cover