The principles of successful project management

It takes careful planning, skilful leadership . . . and a little bit of luck

Bob Little

Successful projects don’t just happen. They need careful planning, skilful managing and some degree of good fortune. Every would-be project manager – and, indeed, every senior manager who instigates a project – needs to learn and relearn the principles of successful project management.

Ron Rosenhead is more than just a Fellow of the Royal Society of Arts. He is even more than the chief executive of Project Agency, a north London-based project-management training and development firm. He is vastly experienced in the arts of project management, having amassed many years of experience as a project manager, trainer and commentator on the subject.

Ron Rosenhead’s experience leads him to promote a four-step mantra for successful projects. These four criteria – amplified in Project Agency training courses, including its recently published e-learning materials – provide a strategic, standard framework for project managers that allows them to: define, plan and control projects; recognize the role(s) they play and define other people’s contributions to the project-management process; recognize and reduce risks in all types of project work; and use a range of tools related to project management.

The criteria for successful projects are:

1. Identify the business case:
   - How does the project fit with your strategy? And, if it doesn’t, why do it?
   - What are the benefits of delivering this project?
   - What are the costs? And are they worth it?

2. Define the project:
   - Clarify roles: identify the project manager and project’s sponsor (a senior manager).
   - Develop clear, measurable objectives – including defining the project’s scope and criteria for success.
   - Identify and manage stakeholders – including “selling” the project to them, if necessary.
   - Define the skills needed by the project team.
   - Identify ideal members of the project team.
   - Produce a development plan and then train those whose skills are lacking.
Devise a risk log (charting the risk-management issues involved in the project).

Develop the plan.

Split the project into its component parts.

Be realistic – not optimistic – about what can be achieved, given the resources available.

Produce charts that show the relationship between activities and durations.

Agree a reporting structure: who reports to whom, about what and at what intervals.

Agree a process by which any changes to the project can be discussed and agreed.

Compare actual with planned progress.

3. Closing the project:

Agree a closing date for the project. This acts as a great motivator.

Reward the project team for its success.

Review the project and . . .

Learn the lessons that the project should teach you.

Ron Rosenhead explained: ‘Of course, there’s more to a project than merely doing it and completing it. At the end, there are many lessons to learn. For example, what went well – and what didn’t? How could things have been done more effectively and/or efficiently?’

Help for novices

To those who are new to project management, Ron Rosenhead advocates using an eight-step process to ensure success:

1. Define your project. He said: “We’re often asked to work with project teams that need to deliver a business-specific project. One of the first things we do is ask, ‘What are your objectives?’ These have to be your starting point. Find out, from your manager, what is expected and turn this into realistic objectives. Discuss with key players what they want. Write these objectives down and get agreement from those involved to what is written.”

2. Clarify project roles and have a clear project-management structure. If you are to be the project manager, you need to know what authority you have to deliver the project. You also need to know what role your senior manager and other senior managers will be playing in the project. “We’ve found that having clearly prescribed project-management roles helps in delivering what is required,” said Ron Rosenhead. “It will help if you write down what each role-holder should do.”

3. Identify and reduce risks. Many projects are derailed because something unexpected happens. An assessment of what is likely to go wrong will help to identify the most likely events that could affect the project. Ron Rosenhead recommends identifying the level of risk using a simple numbering system – and identifying who will manage these risks. He added: “Make sure you review all of your risks on a regular basis because something that’s not a risk now may become so in, say, a month’s time.”

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4. Don’t forget the people. “You’ll need to ensure you take people along with you,” said Ron Rosenhead. “Project Agency research shows that those projects where stakeholders are identified and well managed deliver better project results than those which take little or no account of this important group. Stakeholders are people with an interest in the project or who will be affected by the project. Identify what their requirements are and what you need from them. “You should also identify the perceived attitudes these groups and individuals will have to the project. Then, you can then identify actions to take to manage the individuals or the group. Like risk analysis, you should continue this process regularly, checking who the stakeholders are and whether anything has changed.”

5. Develop a robust project plan. Ensure your project plan is credible – by identifying all the activities you need to carry out, putting cost and time estimates against them. Show the order in which the tasks will be done and produce a Gantt chart or milestone chart. “Research shows we suffer from optimistic planning bias,” said Ron Rosenhead. “In other words, we think we can deliver an activity in a project in less time than it will actually take. “Use percentages to help you. For example, ask yourself how confident you are of achieving the activity in the time given or against the identified budget. If you are less than 80 percent confident, recalculate until you get to the 80 percent figure. This process can be used at an individual task level, a stage level or for the whole project.”

6. Deliver what you say you will deliver. Develop a simple monitoring and control system early in the life of the project. Ron Rosenhead advised: “Be clear what role your senior manager plays and ensure you don’t get bogged down with completing long, wordy, project reports. Use simple highlight reports to show progress. Hold brief project meetings – which should be on your project plan – and challenge and support each other to ensure you are going to deliver when you should.”

7. Dealing with project changes. Beware of project changes. Ensure you have a system in place for dealing with them. “Identify the impact of the change before agreeing to it and ensure you understand who can agree to any major changes in, say, budget or objectives,” said Ron Rosenhead. “Any system you instigate must take account of your stakeholders and the project team.”

8. Stop “project dribble”. “One common problem with projects is that they fail to finish and, instead, keep ‘dribbling on,’” said Ron Rosenhead. “So, you need to plan to hold a project-closure meeting – putting it on to your Gantt chart to ensure it happens. “Use a facilitator to ensure that all of the learning that came out of the project is shared among project-team members and others in the organization. Identify elements that need to be finished and agree who will deliver them and close the project,” he concluded.

Project monitoring and control

According to Ron Rosenhead, there are also eight key factors that keep active projects on track. He explained: “Even after planning a project carefully, identifying the stakeholders and the project’s risks – and actively managing them – there are plenty of things that can go wrong. To stop this happening, you need a monitoring and control process for your project.”

Rosenhead’s eight key factors in this process are:

1. Loose versus tight control. You need to decide, in conjunction with the project’s sponsor (a senior manager) the type of control that is appropriate for your project. Tight control is appropriate for high-risk projects. Once you have decided on the appropriate type of control – and you may want to mix the type of monitoring and control throughout the project – ensure you develop a system that fits it.

2. Project spend. It is vital to have accurate project-spend figures – regardless of the amounts of money involved. Create processes for capturing the figures if your organization’s internal system does not help.

3. Tolerance. In conjunction with the senior manager who is the project’s sponsor, agree a “tolerance” percentage – in terms of time and/or resources. You only report to the
sponsor if an activity within the project turns out to be over or under that agreed percentage.

4. Planned versus actual. Develop a chart that maps out the planned activity’s durations and costs. Plot the actual figures and compare them with the plan.

5. Reporting. Agree with senior managers how often and how you will report. Ron Rosenhead advocates a one-page report with agreed headings.

6. Milestone reports. Develop a “milestone” reporting chart – and ensure that, when someone reports that he or she is off schedule against a milestone, he or she has a recovery plan to bring it back on target.

7. Project changes. According to Ron Rosenhead, few projects go through their life-cycle without change, so develop an agreed process to deal with these changes. Control the changes rather than allow them to control you – by recording the type of change and its impact – and agree changes with the project sponsor (and if appropriate, key stakeholders) if the change affects the project budget or the project’s objectives.

8. Meetings. Have agreed agendas and agreed durations for each project meeting. Ensure you produce action points that are circulated soon after the meeting. “At the Project Agency, we advocate putting in place a project monitoring and control process as early as possible in the life of the project,” said Ron Rosenhead. “This process needs to be discussed when the business case for the project is made. Otherwise the project could ‘stray’, wasting precious time and money.”

**Note**

For more than 20 years, Bob Little has specialized in writing about, and commenting on, corporate learning – especially e-learning – human-resources and technology-related subjects. His work has been published in the UK, continental Europe, the USA and Australia. You can contact him via bob.little@boblittlepr.com. For more information on Project Agency, please visit: www.projectagency.co.uk

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