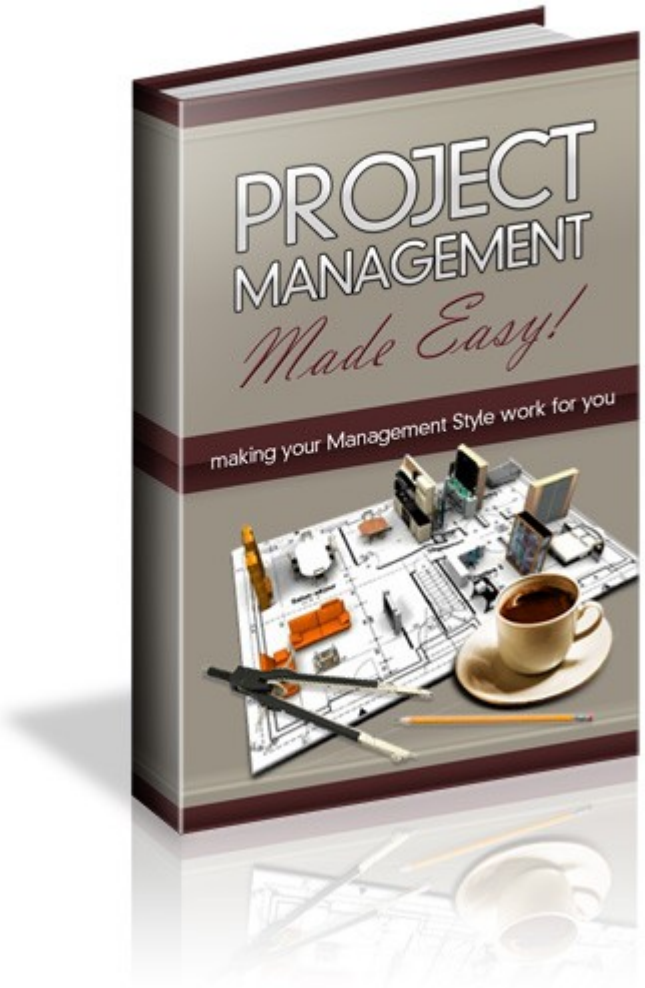
Project Management Made Easy!



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Chapter 1 - Introduction

Like many people who feel stressed and "under the gun," so to speak when it comes to a major project you have going in in your life, you are looking for the instant cure - the magic beans that will lead you up the beanstalk and to the golden goose. No such thing. Good project management - for any project - takes patience and planning. Something that very few people today seem to realize.

How many projects have you started and than had to give up because of lack of funds, cooperation or simply because of lack of focus? You are far from alone. Every professional project manager runs into these snags. Each day you get into the office and it seems that something is going drastically wrong with the project. It's almost like facing a nuclear meltdown on a daily basis. The trick of being a successful project manager is fairly simply - you have to manage the project and not let the project manage you.

Are you facing a project crisis right now? Do you have a project that you feel will never get done? One that has a deadline that you feel is going to be impossible to meet? One that is running out of funds? One that you feel that you should never have taken on because you don't have the skills for the project. Do you feel like skipping to Tahiti so that you can get away from the project?

While Tahiti may sound like a nice idea, it is not the answer and you know it. You also know that deadlines can be extended and that you do have the skills that are required to make the project go through. Financing can be tough, but there are creative ways to get the

financing for your project if you look hard enough. You just have to be willing to persevere.

Do you know what makes a good project manager? Persistence. It is the one single quality that every successful person has. You may feel tempted to bail on this project, but what are you going to do on the next one that gets a little hairy?

This book is not just a little pep talk about persistence and the "go getter attitude." You can read "The Little Engine That Could" if you just want that. What this book will tell you is how you can make your project work and be the successful project manager that you know that you are.

Some of us set ourselves up for failure before we even try to get started with a project. This is a shame. It makes you wonder what type of inventions and technology that we missed out on because someone didn't have the guts to stick to their convictions. If your project that you are managing seems as if it is going all to pieces, it has not failed. It has reached a snag. Try to look it as a problem solving opportunity instead of the end of the world. Put your coping cap on and start taking a look at the problems that the project is facing step by step and try to come up with solutions. Because if you think that you are going to be this magical project manager that allows everything to run smoothly and on even keel, you have either just graduated college or have been watching too much TV. All projects have problems. All projects run into chaotic moments. All projects seem doomed at one point or another. It is how you manage these situations that determines the type of project manager that you are.

Once you learn to break down the steps to a project and put them together, rationally, you will find less chaos in your projects. Less stress and those projects will start running a lot more smoothly.

The project management meltdown usually begins with some sort of "emergency." Some deadline will be looming and everyone will start to panic. As project manager, you will start barking orders to your staff, downing Tums and creating impossible demands for everyone. Your staff, in turn, will follow your lead (after all, you are the project manager) and will also get stressed out. They will start barking at their subordinates. Pretty soon the entire office is stressed out as the catastrophe that has been created (largely in everyone's heads) begins to spin out of control.

And it isn't just your colleagues and subordinates that suffer, either. You suffer. Your family suffers as you start lashing out at them. Your staff starts lashing out at their families. Going to the office is in the morning is akin to facing the guillotine. How many times has your heart raced as you parked your car to head into your office on such a day?

When I tell you that not even people who work in the emergency rooms of hospitals where people's lives are in their hands do not behave in this way, do you believe me. They don't. And there is a good reason for that, too. Because if they did, they'd save fewer lives. Much fewer. ER doctors and nurses are sort of like project managers in a hospital. Sure they have their "code blue" when everyone starts running, but even in those cases, where they are actually in the midst of saving a life, they do not behave like people in an office who are

under pressure to finish a project.

The reason for this is that they are trained not to panic. They are trained to remain calm and to do what needs to be done. They have the skills and they know how to use them. You have the same set of skills - you just haven't developed them yet. So now you're going to learn the skills.

In this book, I'm going to teach you the skills that you need to be an effective project manager. One who gets the job done without high drama and stress. Think you can do it?

Of course you can. Anyone can develop these skills. You just have to be able to exploit your positive traits and quell the negative and you will be able to not only be an effective project manager, but create an effective team. The skills that you learn can be passed on to those around you who will take their cues from you - the boss, and learn how to cope with deadlines, missing information, problems on the job, unforeseen circumstances and financial issues.

You may be thinking "I have a deadline due, I don't have time to learn these skills and read this book." The truth of the matter is that you really don't' have a choice. Either learn the skills now, or face similar meltdowns in the future. Learn the skills now or continue to be a stressed out, ineffective project manager who is always struggling to get out of the bag. Who lets circumstances around you control you, instead of controlling them.

Anyone who is a project manager of any type - whether you are in

charge of building multi million dollar skyscrapers or the PTA, needs this book. Because the skills in this book will allow you to get things done in an orderly and effective manner, causing less stress on your colleagues, vendors, employees and even your family.

Chapter 2 - Creating a Project Management Methodology

The project management methodology is simply the method (steps) by which you will use to complete each project from beginning to end. As a beginner, your methodology will not be as defined. As you grow as a project manager, you will begin create your own methodology, taking from others methodology and creating your own unique one. In my opinion, the creation of a methodology that would encompass the entire project would be too broad and bold of a task. The term methodology insist that you devise a method, orderly thoughts and actions. Regardless of your experience everyone works around the same project management essentials, they are as follows…

4. **Define the Project**
5. **Plan the Project**
6. **Monitor the Project**
7. **Close the Project**

With the tools, I am going to teach you, you will soon find yourself completing these stages by memory. In time, the process itself will become automatic. The goal of this book is not to create robots, but to promote open thought, analysis, measurements of progress, and ultimate success. And although there may be stages and processes to follow, the intent is that you will take the foundation and make it your own.

You may be asking what does that mean, "Making it my own?" While following instructions is good, nowhere in history did following instructions alone make successful pioneers or trailblazers. In most

cases, great success was achieved by using individual ability to take a concept and think outside the box and beyond. This type of thought process and project management is what led to most of the inventions and concepts we use today.

Your methodology will form itself over time. Your methodology is a living thing, you may delete and or add to it until you get to place of completion. For some this process takes weeks and some they have yet to find that one set of principles, philosophy and actions that work for them.

Your goal, take what you learn and devise your own methodology, one that is entwined within you and not a clone of someone else's.

What is the Methodology of this Book

Most books that I have read on project management break the project up into deadlines. I don't know how this is possible when each task is unique. You could not possibly make all the tasks of a project conform to one set of deadlines, parameters or stages. One task might be completed in minutes, while others may take weeks or months. This is why this book breaks the projects into tasks, apply the essentials to each and brings it all back together for the completion of the project.

You have decided to plan a party, your boss has assigned you a project, or you have an assignment due for class. No matter what the project, it is made up of two or more tasks. We will first tackle the project from a task perspective.

Each task completed brings you that much closer to completing the

project. Each task will have four stages: Decision Making, Execution, Follow-up and closure.

With my approach, you will see progress quicker, and you will not feel overwhelmed with the project as a whole. The more traditional approach is similar to saying I have twenty-five pounds to lose. Thinking about the entire twenty-five pounds and what it will take to get there can be somewhat depressing. But looking at it from a how many pounds I can lose per week perspective decreases the amount of stress and increases the potential to reaching the goal as it is broken down into more measurable components of weeks or even days.

Chapter 3 - Where Does The Buck Stop?

Good old Harry Truman. He coined the phrase "the buck stops here." Very few people today are willing to take Truman's challenge and want to pass the buck. It is so much easier, after all, to blame others for your problems with your project than to take the blame yourself. But in all truth, if you are the project manager, guess where the buck stops? Yep, with you.

The blame game is a game where no one wins. It's very similar to monopoly. It goes on forever and in the end, someone usually tosses the board around and quits angrily. It is not the vendor's fault that they did not send the order on time. It is your fault for either (A) using a vendor that has a habit of not fulfilling their obligations or (B) not following up with the vendor. It is not your secretary's fault for not calling the vendor.

So, for the sake of example, let's say you have a big project due and the vendor is not going to be able to make the deadline. You can either try to get to work to solve the problem by using some creative tactics, looking for another vendor or you can blame the vendor and everyone else in the office for this error. The point is that no matter how much you toss the blame around, it doesn't matter. The buck stops with you. So it is up to you to come up with a solution the problem.

Screaming at the vendor may give you a moment of release, but it is not going to increase the respect that your staff has for you. Screaming at your subordinates is not going to make the vendor

magically appear with the goods. Blaming others is utterly useless. A good project manager solves the issue first. After the issue is solved, he or she may decide whether or not to ever use that vendor again. Each calamity that you face with any project should be looked at as a learning experience and not the end of the world. If you are unprepared to do this, you will not be an effective project manager. And yes, this is easier said in a book than when it is actually happening, but remember, before I started writing and speaking, I was a project manager. So I'm talking from experience. Lose the blame game. Being the project manager does not meant that you get to sit in your office ordering other people around. It means that you also have to assume the risks that go with the job. And in order to do that, you need managerial skills. But you can do it. Because these skills can be learned.

So instead of blaming others for this mishap, you need to do a little self diagnosing. What can you, yourself, do to make the situation better? How can you learn from this situation so that it does not happen again? What could you have done to prevent a situation like this from arising? This is not done to beat yourself up, but to get you to learn from your mistakes and to prevent you from repeating a pattern. So many people play the blame game and then go on to repeat the same pattern over and over again. You want to avoid that so that you can be an effective project manager. Self examination is one of the tools you need in order to grow as not only a project manager, but a human being as well.

Human beings are entitled to mistakes. They are just not entitled to make them over and over again. So in order to learn from a problem

on the job, you need to do a little self diagnosis. No matter how smart you are, no matter your education and no matter what type of experience you have in your field, you are going to run into snags. Self diagnosis should be an ongoing learning experience. Not to be perfect - as no one truly is - but to become better. Successful people are always striving to raise the bar and be better at their jobs.

Like all human beings, you have a series of personality traits. Some of them are good and others may be not so good. The trick is to acknowledge all of them an learn how to use the good ones and minimize the bad ones. We all have shortcomings and bad habits. We also have limitations. But we can learn to overcome our shortcomings, stretch our limitations and allow our positive traits to define ourselves as human beings. Learning to focus on our own qualities and not blame others for everything that goes wrong is the first step in effective management.

Chapter 4 - Can You Manage Yourself Out Of A Paper Bag?

I have been planning events and completing complex projects for years, and I consider myself to be a well-organized person. I even have lists for my lists! I use the *7 Habits of Highly Effective People*; and I never go anywhere without my Franklin Covey® planner with Palm® Pilot attachment.

It was not until I accessed my *potential limitations* and followed the steps outlined in this book that I really began to complete task after task with the least amount of stress, setbacks or delays. This is coming from a person who early in my career was told by a manager, "Angela, you couldn't manage yourself out of a paper bag." After all I have done to master the art of project management, all I can say is "How do you like me NOW?"

Everyone has the potential to complete a project. To what degree of completion is solely dependent upon the person managing the project. We may have physical or mental limitations, but it is usually the preconceived notions or subconscious thoughts we have about ourselves that limits us from completing a project to its fullest potential.

Take a look at the projects you have attempted to complete in the past and identify what was lacking or incomplete. Most likely, you will begin to see a trend or pattern that has been holding you back. Those are the *potential limitations* we are going to work to eliminate and/or counter these during the process. Let me give you a personal example of how I made a change in my project management process and

became more successful.

Earlier in my career when I was doing seminars, I became fixated on attendance. It was so important to me how many people attended that I slacked on the content. I allowed my addiction to social acceptance cloud the true purpose of the event, which was to educate and create exposure for my company. That limitation prevented me from providing more seminars. As a result, I'll never know the impact they would have had on my business growth.

I learned to counter that fixation by planning the event with a commitment to making the seminar educational and informative. Setting aside my own fears of social acceptance, I am committed to putting on a successful seminar even if there are only two or three in attendance. And strangely enough, as I started to focus less on myself and more on the actual content of the seminars, the attendance started to increase.

We all have these *potential limitations*. If, in your mind you are too busy, you will then begin to act out your life in a manner of someone is too busy. If you feel that you cannot harness the resources necessary to successfully manage a project without stress and angst, then you will always be stressed out while completing your tasks. That is called a *self-fulfilling prophesy.*

This concept is nothing new to the Psychology 101 student, but it has never been applied to you and how it affects your ability to complete your goals.

So now let's stop limiting our potential and get down to the business of actually completing projects. Let me teach you how to manage your tasks, your projects and even get yourself out of that paper bag you have created around yourself.

Chapter 5 - Setting the Stage for a Successful Project

The majority of people who undertake a project start out like gangbusters. We all tend to jump into the deep end of the pool without worrying whether we can swim. Before long, we're screaming for a life preserver or trying to keep ourselves afloat.

In order to set the stage for a successful project, you have to set the stage. Setting up a successful project takes planning. It's just like making a movie. As the project manager, you are the producer. Now, imagine trying to produce a movie without a script, actors, a director or a set. Just "hoping" that your vision will take shape. Sounds ludicrous, right? Well, it is no different than starting a project without a plan.

When people jump into a project without setting the stage for success, what happens? They hit a snag. Then they hit a bump. Then they hit a roadblock. Before long what happens? They give up. That's why it is so important to have a game plan when you are starting any sort of project. Want another analogy? Picture a football team going out to play and saying "we're just going to wing it today. No plans, no strategies. Let's just toss the ball around and see if we can win."

But you don't want to run your project like the Chicago Bears team, right? So you need to have a plan. This does not mean that it is etched in stone. Circumstances change. You have to have a plan, but at the same time, you have to be prepared for setbacks and what you are going to do if you run into any glitches. And there are plenty of glitches that are bound to come up in any project. A few of them are:

8. Delayed or insufficient finances
9. Missed deadlines
10. Project proposal rejection
11. Inability to solidify venues for important dates
12. Lack of Pertinent information or details
13. Decision makers holding up the process

This happened to me. I decided to write this book called "You Need This Sh!t When." Well, needless to say that there was a problem with the title, despite the fact that it really did hit the nail on the head. Let's just say that one word of the book sort of hit the fan.

Naturally I was disappointed. On top of that, the book could have been re-named, but the editors said it lacked "substantial content." This was a setback I hadn't counted on and was even more of a disappointment. After all, changing the name of the book was easy. But where the heck was I going to get substantial content. What was even worse was that I was proud of the book and thought that it would be received with applause. I felt a sense of accomplishment when I wrote the book that was quickly snatched away from me by a few critics. How many times has that happened to you?

We labor at a project and give it our heart and soul. We jumped into the project with both feet and were prepared to swim. Instead, we ended up sinking. And getting that terrible feeling in our stomachs when we feel that all of our best efforts were in vain. So what happens next?

Do you know that 99 percent of people give up. Yep, they fail at something and then decide that they must be failures. After all, someone didn't like something that they did. They loose the motivation that they had when they jumped into the project like gangbusters. Then there are those who are able to shrug off the disappointment and move on. They are able to motivate themselves and continue trying.

Freud said that "we are who we imagine others believe we are." Therefore, given the logic of the good doctor, if we believe that others see us as failures, we are then failures. If we believe that others see us as successful, we are successful. Freud said that even if we felt we were successful, if we didn't think that others viewed us this way, we did not fulfill ourselves.

The majority of us believe that we are good, but how do we view ourselves as others see us? This is not to say that we should view ourselves as others see us, but how we imagine others see us. Using this gift, we can transform a self defeating attitude into success. This works with objects as well. Before we can make a project successful, we must first view it as being a successful project by others, including ourselves.

What does it take to be successful?

I am a runner; I began running track when I was in 4th grade. Competition is a good thing, especially as it relates to accountably and the discipline required to be the best or better yet to compete. How does anyone expect to compete in this world without preparation and

training?

Then there is natural talent. We all have a natural talent for one thing or another. While I might have had a natural talent for running, my peers also had natural talents. Some of them tapped into those talents while others did not. Some of the other runners I knew had a natural talent for the sport, but did not give it 100 percent. Then there were the kids who really were not natural athletes, but gave it their all and were determined to meet their goals. Those who gave it their best shot always came out ahead. And when you combine natural talent with 100 percent effort, guess what? You find success.

A project is something like a race. You have to prepare for the race, have the talent, have the drive, use both to the best of your abilities and keep your eye on the finish line. Look at a project like a race that you will do your best to win and will do whatever it takes to cross that finish line.

So what do you do before you start a project? The first thing that you should do is access you skills. What skills do you have that will enable you to win the race? What type of drive and determination do you possess that will enable you to cross that finish line?

What about your weaknesses? How do you compensate for them? Perhaps you can develop a team that will help you win that race so that you can cross the finish line first. One person may be better at sprinting, another at jumping hurdles. After you get done examining your own set of skills and talents that you need to prepare for victory in your project, you need to prepare others.

When you are a project manager, you manage a team of players. Each one of the members of the team should have something to contribute. And each of their contributions should be valued. While racing may be an individual sport, managing a project requires team work. Successful people understand that they cannot do everything by themselves and often surround themselves with others who can compliment their own deficits. You need all types of individuals to succeed when you are running a project. Even if you feel that you are doing it all on your own, you still need help from suppliers, vendors, venue operators, etc. Learning how to access the skills of your team is an essential part of being a successful project manager.

Project management is not an easy occupation. Even if you are managing a small project, you are bound to run into snags. Some of them can end up costing money or time if not managed properly. It is not a career for the faint of heart or the shrinking violet. But if you have the skills that it takes to be a success, are willing to believe in yourself and also entrust some of the tasks to others, you can be a winner when it comes to project management.

Do not allow failure to even enter your thoughts. It is negative and does nothing to move you forward. I have never considered failure to be an option for me and neither should you, if you truly want to succeed in this field.

Once you have your proper mindset with regard to the project and have your team in order, you are then ready to start making the necessary plans to insure that your project is successful. You are

poised and ready for success, which means that you are on the right track of making sure that your project is also a success.

The Gift Of Gab

Ever hear of a "the gift of gab." This is a line that is used to indicate that someone is, what we refer to today as a good "BS" artist. There are plenty of people around who have succeeded in their field despite the fact that they had little education. Many of them just had good people skills that they used to rise to the top of the ladder.

You have most likely met all sorts of people in your career. There are those who come across as confident and savvy. You tend to trust them and believe in what they are telling you. They may not even have a college degree and be on the job for a few months, but already they're taking over the office.

Then there is the guy who has three PhDs sitting in the corner who hasn't been promoted in 10 years. You often want to think that he has the personality of a stapler, but you don't want to insult the stapler. Every office has people like this. The shining stars may not know as much about the business but are willing to learn, have a tremendous amount of confidence and have the gift of gab. While a lot of their "knowledge" can be BS, they can be invaluable when it comes to dealing with people. People who are "people-people" are good at diffusing arguments and even motivating others. Do not discount them. In fact, most successful people are pretty dynamic.

The stapler guy may seem like a dud, but he knows his stuff. He can

do all the work the computer can do without the computer. He is of value to the company as well and to your team. You need the analytical type who are very detail oriented in order to make your project run smoothly. One of the basic aspects of being a project manager is to ascertain the value each employee has and how it can be put to good use for the common goal - which is the completion of the project.

As a project manager, you are in charge of these people and, as mentioned earlier, the buck stops with you. It is also necessary, therefore, that you acquire a little people skills. Having people skills is something that comes naturally to some, but is basically based on confidence. If you want others to trust you and value your opinion, you are going to have to develop these skills. Without them, you will have a struggle not only with your clients and superiors, but with your team as well.

Confidence is key, especially when you are a project manager. If you are not confident in your abilities and the project, how do you expect others around you to feel? When you exude confidence, you can then inspire your team to also be confident and hone in their skills to get the job done

Some points that you want to remember when you are projecting confidence to others include the following:

14. **Always make eye contact,**
15. **Never be afraid of asking a question**
16. **Always recap the meeting and verify action items and**

assignments,

17. **Always be the first to follow up.**

Factors to Consider When Initiating a Project

Once you have your team together and the willingness to make the project successful, you have to consider other factors.

In Chicago, there is a large skyscraper on Michigan Avenue that was part of a project initiated by a very large Chicago firm. They got to the 20th floor of the building before they realized that they did not have the financing to pull off the project. This forced the construction company into bankruptcy and several suppliers as well.

This should be a lesson to anyone who is planning any sort of project, no matter how big or small. Have the funds available *before* you begin. Lack of funds, going over budget or a halt in financing are the primary reasons that projects fail. Therefore, it is essential that you have a budget for the project and that you actually stick to the budget. You also have to know where the funds are coming from and what you will do if, for some reason, the creditor bails out. Operating on a "Plan B" contingency is always the smart move for any project manager.

This is the case for the individual, small business owner and large corporation. The intent for any project requiring a budget is that you will have the funds allocated to complete it. In most cases you will find that monies are not set aside prior to or during the planning stage of the project. If and that is if the monies are available, it will be made available at the time in which the task absolutely positively has

to be completed. 90% of the time people wait to the last minute to complete a task (printing materials, venues, etc.) is because they do have the funds. And to make the situation worst, when the funds are made available, there is not enough. This is no way to run a business.

Before you begin your project, have the money. Not having the money and starting the project is akin to going to the store, getting a cartload of products and then wondering how you are going to pay for them when you get to the checkout line. You shouldn't start a major project without knowing where you are going to get the money, especially in today's economic climate.

In most cases, if you borrow the money from the bank, you will be allocated funds upon different levels of completion of the project. You will have to complete a contractor's statement and submit bills to the bank that will be paid directly by the bank. This often happens in the case of smaller businesses.

In some cases, a business may be offered a line of credit from a bank. If you have a line of credit, you should realize not only how much the project will cost, but how much the interest on the line of credit will cost for you to repay. Interest and fees must all be figured into the project. In order to get a line of credit or any type of financing, you are going to have to come up with a solid business plan and, in some cases, put forth some sort of collateral. If you the project you are creating is a building, the land on which the building sits may be considered collateral if you own it.

If you are managing a smaller project, there are various creative ways

that you can find funding for the project. The first thing that you will need is a solid budget proposal. A budget proposal will detail how the money will be spent towards the project. Anyone who invests in your project will want to not only see the budget proposal, but will also want to see evidence of your other work and may look for references.

Methods in which a Project Manager can acquire funding for their project

18. **Investor groups**
19. **Grants**
20. **Fundraisers**
21. **Friends and Family**
22. **Savings**
23. **Bartering**

The Tool is only as Good as the Owner

There are so many tools and aides designed to help you mange a project. With all those tools and aides, it is a wonder why more things are not getting accomplished. Quite the contrary, in most cases these tools have slowed the process and created additional layers where they are not needed. Here is a list just to name a few…

1. **Milestones Check-list Scheduling Tools and Methodologies**
2. **Gantt Pert MS Project**
3. **Business Case Justification**
4. **Project Charter**

5. **Project Framework or Overview**
6. **Score Cards**
7. **Team Building**
8. **Project Management Templates**
9. **Project Management Software Packages**

In the right hands, these programs and tools can be very successful, but to the beginner they just over complicate the process. As you begin to manage more projects, you are going to find yourself wanting more. At which time, I would recommend that you access the need, research the tools available and try two or three to see which one works best for you. Until such time, all you need is a method in which to track…

24. **Project Status**
25. **Task (Deliverables)**
26. **Key Dates (Milestones)**
27. **Decision Makers (Stakeholders)**
28. **Issues**

We will go into detail later in the book, however now it the time to familiarize your with the various tools out there and decide which you would like to use. For the beginner, the Microsoft Office package (Word, Excel, and PowerPoint) will suffice. Just basic supplies and a calendar and this all you need to get started.

Establish The Resources

People, equipment, facilities and other things used to plan, implement

a task or project. It is very crucial that you establish your resources first off, and here is how you do it. The technical term for this is PMO (Project Management Office).

29. **Establish a meeting place;** conference room, local library or bookstore, etc. Preferably, a place that is free. If necessary book this meeting place; at least once a week until the project is scheduled to be completed. This does not have to be a physical location, it can be conference calls or if needed a WebEx.
30. **Acquire any equipment needed.** In most cases, equipment is not a factor. Project managers who are very organized use PowerPoint presentations and need a LCD projector and screen. Construction Project Managers sometime require that their supervisors carry two-way radios.
31. **Open the line of Communication.** Send each potential team member an email. Within this email will be the project name, meeting place and times. It won't hurt to include a statement of intent and expectation.
32. **Get a commitment in writing from the players.** Ask each person to respond to the email that they are on board and that they can commit to the meeting times.

Once you have established financing for the project, figured on the right tools that you can use to make the job easier and have also established a meeting place as well as time, you are then ready to begin the project.

It doesn't seem so difficult when you look at it this way, does it? That is because you have broken down the project in bits and pieces. When

you do this, the project does not seem to be so overwhelming and will be easier for you to manage.

Chapter 6 - The Importance of Developing and Maintaining A Budget

One of the most crucial aspects of insuring success for your project is to develop and maintain a budget. You will lose valuable time and momentum by not adhering to a well-defined budget to help guide you through the process of completing your project. It is much more difficult to achieve your ultimate goal if a good part of your time is spent trying to cut corners and squeeze out every penny in the process. Your time has an intrinsic value that should never be overlooked. Too often project managers do not realize the value of developing a realistic, cost-effective budget that can help insure success of your project. The Successful Project Manager understands the importance of proper budget development and maintenance and would never undertake a project without this critical management tool.

The problem with maintaining a budget is that people do not take the time to create one in the first place. Instead of creating a budget; saving or raising the monies to fund the project, some subscribe to the "Rob Peter to Pay Paul" philosophy. Taking monies from a project or funding that already exists in hopes that when the additional monies are needed they will miraculously appear is a very precarious approach to project management. More often than not, the project manager is left with the burden of funding the project or having to compensate for the lack of money. Without a budget, you cannot begin to understand to what degree this project is going to affect your pocket. It is from here you can ultimately determine the feasibility of the task or the project as a whole.

It is imperative to establish the budget and to insure that upper management and/or the funding committee have agreed to your budget and is willing to guarantee the monies are available when needed. While I do not advocate "padding the budget," I do recommend that you plan for the occasional cost overrun. It is not a good habit to under-budget your projects since it will just necessitate going back for more money to complete your projects. Management or funding committees are much more receptive during the initial budgeting process if you have presented a reasonable and well thought out plan for the project. If you happen to come in under budget, you will gain added respect for being fiscally responsible and a good negotiator and manager.

Once the research has been done, you just have to put it in a format that is easy to access and update. I recommend utilizing Microsoft Excel™ as your spreadsheet. This program is very easy to set up and to make changes and revisions. The program is designed with formulas that calculate amounts, percentages, overruns, etc. Be sure to include every aspect of what is needed to complete the project. There is no category too small to be included – even if some of the most incidental categories added together and labeled as "miscellaneous" on your spreadsheet. Sometimes it is the small items that can throw your budget out of balance. Ideally, by the end of the project, your expenditures will reflect the sound business decisions that you have made each step towards completion of a successful project. The budget is your guidepost that insures that all aspects of the project are being funded and are on track for completion.

The budget is made of four components: The task, the price per unit,

the estimated cost and the actual cost. When you create the budget, you will begin with the estimated cost, totaled this will represent your budget.

Budgets are meant to be changed, revised and updated. Every time you make decision or add a task, the budget will have to be revised to reflect the change. Once you have completed a task, record the actual cost (tax included). By comparing the total budgeted cost to the actual cost each time, you will be able to monitor the amount of monies needed to complete the project. Budgets are not an exact science; the actual cost may be higher unless you were able to score discounts. The whole key to the budget is to keep you in total control of the situation and enable you to foresee problems before they happen. By establishing a realistic budget and trying to stay within the parameters of the monies that you have, the budget can be one of your most valuable tools in successfully managing projects and establishing yourself as a Project Manager.

Chapter 7 - Taking Action – Execution of the Plan

So now you are ready to start the project. You have the team. You have the money and you have a budget in place. Most importantly, you have the right attitude. You are finally ready to put the wheels in motion and take action.

The real work begins once you start the project. You know the old saying of "the best laid plans of mice and men," right? Things might not go perfectly for you. In fact, you can rest assured that you will have a few glitches. But if you have the right attitude and employ the right skills, you will be able to meet your goal.

By this time, you have met with your team, brainstormed on different aspects of the project and you pretty much know their strong points as well as any weaknesses. You know who can be trusted to do what. As project manager, it is up to you to delegate.

Delegation is the most important aspect of good management and is something that will be discussed later in this book. Although the completion of the project is your responsibility and you are not into playing the blame game, you have to be able to trust those on your team with completing their tasks so that the project can go as planned. Once you have set the wheels in motion and the project has actually started to take shape, you will have meetings with your team and updates. These can be done in person or by internet.

You have made your decision and now you must act upon that decision. It has been relatively easy up to this point. Now the real

work begins. So as not to overwhelm you, do not think of this "action" as a whole. Later we will discuss the decision making process. Later, we will discuss the levels of brainstorming details that are needed in the decision making process. Each phase of the project will enable you and your team to make decisions. Remember that you are in control of the project so while you may delegate the various responsibilities of the project to your team, you still have to stay on top of what is going on. The amount of delegation that you do depends on the size of the project and the expertise of your staff or team. While delegation is important in order to manage effectively, you do not want to delegate too soon in the process.

As stated before, it is your responsibility as the originator and or assignee to make sure that the project is carried out to the fullest. Allowing others to be involved in the decision-making process until it is absolutely necessary can cause unwarranted delays. Instead of delegating the idea or concept, you are delegating an actual task with contact information, timeframes and details (all of which are contained in your folder). All your designates have to do is execute the task, monitor the progress, and follow-up when assignments are completed or problems occur.

This is the time to establish timelines. Each task will have a separate timeline, each working towards the completion of the project as a whole. In order to make this part of the project go smoothly, I suggest you mark up a calendar identifying all of the dates relevant to the project and each task component. This is going to require you going back through your notes and making contact with vendors, stores, etc. and then putting thumbnail information on the calendar to

remind yourself of deadlines, timeframes, and different stages of the project.

It is imperative that you do this promptly; do not wait. Give them your deadline and allow them to tell you exactly what needs to happen between now and then. As far as the deadline is considered, allow yourself a small cushion – but not too much. From experience, setting fictitious deadlines is not a good idea. Some believe by setting deadlines that are not factual, these fabricated dates will compensate for problems or delays. This is not the case. Compensating for problems and delays can be properly handled by initiating proper follow-up of tasks and assignments. Valuable trust can be lost should team members realize that you did not have enough faith in their ability to tell them the true deadline and timeline for the project.

It is crucial that you do not forget about the delegated tasks. Take the time to record on your project calendar regular follow-up dates to monitor progress. For example, if you are planning a large printing project and have concerns about meeting the deadlines to print, collate, and deliver the project, then mark your calendar for a week prior to deadline for a progress or status call.

Obviously, in this age of technology, there are many methods in which you can record pertinent dates. I leave it to you to decide what works best for you. Although I am very computer literate, I find that using a paper planner (with a week at a glance) is best for me. Some people want to see the entire month and some like to view it on a day-by-day basis. There are those that like to keep important dates in their PDA or cell phone or tablet since it is usually always with them. The

manner of keeping a calendar is entirely up to you. The importance of a calendar is critical to both time management and project management success.

Chapter 8 - Rules to Manage By

A project manager is a manager who has to know all about management rules. As a successful project manage, I have managed (no pun intended) to gather some rules to manage by. They have worked for me and they will work for you, too, as long as you take the time to learn them. Once you begin putting them into process, you will find it easier to manage others as well as your own projects. These rules are the basis of my methodology, they are the foundation for any project I attempt to manage. These are critical keys to your success. Think about each rule, and try to follow these during good and bad times! If you have personal Rules that you have identified, incorporate those with the ones I have outlined below.

33. Accept each project with a positive attitude and a vision of the successful end result. In times of stress, reflect back on the vision and do not overly dwell on the issues or problems. The successful VISION OF SUCCESS must be with you every step of the way.

34. Always get commitments in writing. There are no exceptions to this rule -- ever. Anytime you get a bid from a subcontractor or any other individual, get it in writing. If you are getting bids for a project, get at least three bids in writing.

35. If you do not have time to explain a task and give full and complete details, do not delegate the responsibility to anyone. You have to be able to clearly articulate a goal and what it entails to be able to expect a vendor or team member to meet

your expectations. People cannot read minds. You are better off to write the task down or ask the person to whom you delegate the task to repeat it back to you so that you see that they understand.

36. Remove the term *As Soon As Possible* **(ASAP)** from your vocabulary. Always state the exact time and date you need something or the date and time you will have something accomplished. ASAP is too nebulous for most people to pinpoint. Have a deadline and then follow up close to the deadline to make sure that it will be met.

37. Do not depend on emails or voicemails to relay pertinent or time-sensitive information. Always talk to the person accountable on the phone or in person. You cannot assume emails or voicemails are followed up on a timely basis or are even handled personally by the recipient. If possible, have face to face meetings, although this is not always possible if you are doing a global project. Nothing beats the personal touch of a phone call. Never assume that someone got your e-mail, text or voice mail message.

38. Always plan for the meeting ahead of time, by sending the agenda out at least 24 hours in advance. Prior to the meeting, practice by running through the entire agenda; asking and answering each question for yourself. Try to anticipate what questions might be asked, research them and include them in you presentation or as a topic of spontaneous conversation.

39. Be prepared to give a status report on the project. Even though you are the Successful Project Manager, you may need to report to your boss, pastor, or committee an interim report on the progress of the project. Be honest about delays, unforeseen problems with the solutions that you have instituted. This shows personal involvement in the progress of the project and gives confidence that you are able to handle difficult circumstances calmly and with resolve.

40. Learn to take any criticism professionally, as long as it is given in that way! If you take professional criticism as a personal affront or attack, you will ultimately lose the ability to be a respected Successful Project Manager. I have seen many situations where a project manager became so defensive about problems with the progress of a project; they were never given the opportunity to manage again. No one wants to deal with insecurities and defensive attitudes. Learn to separate the personal feelings from the professional critiques.

41. Avoidance is never good. Always be upfront and willing to face the situation straight on, no matter what the outcome or consequences. Whatever short-term fallout from a project gone wrong will be replaced by long-term professional and personal respect earned by taking responsibility for failure. If a problem arises, do not hide your head in the sand to avoid it because it isn't going to go away on its own. Be prepared for problems and face them head on.

42. Reward the <u>entire</u> team after a successful completion of a

project. With proper management and guidance, your project team needs to be rewarded with words of gratitude, encouragement, and respect for a job well done. If you have the ability to show your appreciation with a more tangible reward (a small desktop gift, flowers, gift certificate) remember that is isn't the value of the gift, it is the acknowledgement that matters. You will get better service as well as performance from those who you thank. The personal touch matters.

43. Be proud of your accomplishments and do not understate your achievement. You have the right to "toot your own horn" after a successful project or event. Without becoming arrogant, it is perfectly acceptable to accept congratulations when given and to visibly show pride in your own success. If no one knows what you are capable of achieving, you may not even be in consideration for the next challenge! We are often taught to be modest. Modesty has no place in the business world. You would be surprised at how many people shrug off a compliment or say "it was nothing." It was not "nothing." You worked hard for the project, you completed your goal and deserve praise. While you're at it, give yourself a little reward as well.

44. Use successful project management as a springboard to other levels of responsibility in the organization. If you show your organization the talent and drive that you have as a project manager, do not hesitate to ask about promotions or other positions available. *Success built upon success* is the fastest way to achieve your ultimate dream.

45. Pay it Forward! Be a mentor to someone who is undertaking the management of their first project. Offer support and encouragement to those who are trying just as you did to be successful. Do not allow yourself to "take control" or start to micro-manage your protégé or co-worker, but rather be a resource or a great listener for someone who will find themselves in exactly the same place you were 2-3 years ago!

Chapter 9 - Your Personality and Project Management Style

Our personality and character are the essence of who we are and stay with us forever. Without our personality, we and others would not have a basis by which to communicate and or judge us. We will first discover what personality type you are. Do you have the traits of a Type A or Type B personality?

Type A	**Type B**
Aggressive	Creativity
Time Urgency	Imaginative
Competitive	Philosophical
Strong	Calmness
Achievement-Orientation	

Type B is the average person, the norm. Often organizations and companies seek Type A personalities for positions, such as a CEO or Account Managers. Type B personalities are sought after for positions, such as graphic designers and writers. So what does this have to do with project management? The majority of Project Managers have Type A personalities. Successful project managers have to aggressive, risk takers with the ability get things no matter what it takes. This is not to say that a person with a Type B personality cannot be good project manager, it is just to say that these people are forced to act outside of their personality to be successful.

Do not get me wrong, type A project managers have their challenges as well. They lack patience and creatively, two things that are important factors when managing a project. For a both the type A and

B personality, it is the acknowledgement of these potential limitations that will be incredibly helpful when the situation requiring these traits arise.

Before we continue, I must stop and address the Pastor, CEO, C-Level Manager or anyone who is in a leadership or executive role who is just too busy to take on one more task or assignment. You cannot take on the added responsibility, you must entrust the project to someone else. The word I am looking for is not *delegation*. Delegation would require that you be involved in the process. The word is *assignment* since this relinquishes you from holding up the process and allows the work to be done without you or your approval. Many executives and managers are guilty of this time after time resulting in projects being delayed or never completed, awaiting your input.

We could go on forever discussing these personality types, but there is a common denominator in the two types. This common link is *procrastination*. The thing to recognize is why do you procrastinate? Is it because you are too busy and wait to the last minute to start a project, or is it because you have no sense of urgency and when you do finally realize that you have a task to complete, it is too late? In most cases, it is lethal to your project management. I believe that subconsciously in both cases, because people do not know how to plan and therefore shut down when required to make a plan and execute it.

Having these *potential limitations* will not stop you from completing a project, but not acknowledging them will. Learning to be honest with yourself is the one of the greatest personal growth accomplishments you can achieve. It is from here that you can honestly commit to

change. It is widely accepted in the medical and mental health field that the first step to recovery is always acceptance. So let's have an honest discussion about you! What are your *potential limitations* or circumstance that might prohibit you from completing this project to its fullest potential?

Here is where a therapist would advise you to take this time to list what you plan to do to counter these thoughts and *potential limitations* when presented with them during this process.
To save the time and money of therapy, here is what you need to do to try to change the paradigm.

Try Something New.

If you procrastinate: STOP IT! Start immediately. Make the time. Decide how much time each day you are going to dedicate to the project. Commit to that time and do it. If you struggle with anxiety, evaluate first-hand if you are in the middle of an episode. Figure out ways to continue even if you are unable to do so. Be honest and acknowledge this is not the time to take on another project. Trying to accomplish something in this state of frustration and flux or not being able to commit your resources and energies to the fullest may just drive you deeper into depression.

If circumstances are that you do not have the resources (time and/or monies) to commit to this project, than you should decline. If commitment for a project is unavoidable, then look at your schedule and find the will to make time to complete it. Consider committing an

hour a day. Remember, whatever you commit to, you must adhere to.

This book takes both the "self factor" and the "project at hand" into consideration. It is very important to identify and relate to both your personality traits and each individual circumstance. They can positively or negatively affect the outcome.

Chapter 10 - The Cycle of Decision Making

There are 3 steps to the decision making process: **Brainstorming, Research, Accept or Decline.** Once we have completed this process we will have created our task.

Brainstorming

Beginning with a pen and paper or on your computer, without details, begin to brainstorm about everything that has to do with this project. Keep in mind brainstorming can happen anywhere (car, bathroom, park, etc.). Actually, most of our day is spent with thoughts that have the ability to spark the act of brainstorming. Make sure you have means by which to record your thoughts. Always carry a notebook or jot a note in your PDA or cell phone.

I have used my daughter's first birthday party as an example of Decision Making. To begin with, here is my list of thoughts of what I need to plan for to make her party a success.

Venue,
Decorations
Invitations
Entertainment
Food

Do not keep writing this list over and over again to correct bad penmanship, misspellings or order of thoughts. Just make the list. Make your list on a napkin or on the back of an envelope. When you have the choice between "being in the moment" or "preciseness,"

chose *being in the moment.*

Brainstorming is not easy and for some it is not intuitive to their thought process. The internet is a great way to help inspire the brainstorming process. Select a search engine and type in what you need (for example: Things to do when planning a wedding). Review the listings and take away the ideas that are pertinent to your project.

Take advantage of your ideas and record the thoughts while you are *in the moment* and your thoughts and ideas are flowing. Too many times a great thought or idea is not recorded and it isn't until after the project is complete that we remember the "one that got away."

When your boss emails the agenda for the staff meeting and ends the communiqué with "we are going to brainstorm new ways to improve productivity in tomorrow's meeting" the brainstorming does not happen in the meeting. For those who understand the underlying message in the email, it happens before the meeting, making them appear prepared. For those who miss the point and only begin thinking about new ways to improve productivity halfway through the meeting, they will make themselves look incompetent or disinterested.

I believe we can train ourselves to become great at brainstorming. This takes practice, but once it is part of your thought process and becomes habit, you will be thankful for those successful brainstorms and great ideas. Think of ideas, improvements and consequences to everything you experience: from breakfast to bedtime, forcing your mind to react to every encounter and developing a mechanism to record and remember these thoughts will put you miles ahead on the

road to being a Successful Project Manager.

Before we move forward, we must do one more thing to the ideas and thoughts we have. We have to now add details. Below is the decoration detail for my daughter's first birthday party. Every idea needed to be research to insure that my daughter had a successful party.

Note: A successful project manager brainstorms prior to the brainstorming session. This not only sets the stage for commanding the project, but keeps the meeting from being useless or unsuccessful.

Research

It is time to make contacts, get others involved, and do the research. All this is necessary to execute the plan. I have made contact with many people, gathered information and have found at the end of the day all I have is information, but nothing definite. If you made it to this point in the cycle, you have to press through. Many people make it to this step and stop. Now is the critical time in project management. If you wait to pick it up later, when it is almost impossible to get it done in the timeframe provided, you will begin to panic. As you begin to make contacts with vendors, librarians, support staff with unrealistic expectations, you will get the dreaded "And You Need This When?" exclamation.

It does not make sense that people stop here since the information they gather is usually incomplete, unorganized and overwhelming. But if you do not have a comprehensive plan on the project management, you probably feel that having something is better than no information

or starting point. I have to tell you that nothing could be further from the truth. The real question is how do you prevent this from happening to you? How do you turn this critical first step into progress on your project?

The first and most essential step to putting the information into a usable format is to start a file. Not a folder on the computer, not a mental "file", but a physical file. Now, you title that file. For example, "Decorations". Although this folder will be used for storage of information in several differing media (quotes, business cards, etc.), you will find two critical things:

46. **List.** This list includes the items you have recorded in your PDA or notebook with details in Step 1 of the cycle. For example: Balloons, Streamers, etc.

47. **Notes.** Take notes of your contacts or identify the reference materials used. Every note, not just some notes. Names, phone numbers, books, research or quotes. You name it!

You may be wondering why do I need to keep all the information assembled when it may not all be useful? This is correct, but at this stage in the process, you really do not know what is relevant and what is not. It is better to have more information, than not enough information when the time comes to accept or decline.

For example, you are almost done with a term paper. You have followed every step of the assignment; however, you find yourself short of the minimum word count required. You recall that while you

were at the library, you ran across an opposing view on the subject of your term paper. You think that would be excellent to discuss and expound upon in order to meet your goal. Instead of racking your brain and wasting time retracing your steps to where you saw that, you refer to your notes in your file, and there it is.

Lastly, the reason for the file is to contain the information in one spot. There may be instances when a physical file is not needed. Here I lay the groundwork; it is for you to determine what works and what does not. Sometimes a paperclip will suffice, other times a file box with folders may be what is necessary to keep information for the project.
At this point, of my party planning, I will pull out the telephone book, do an online search, or visit local party stores. I always write down the location and phone number of the stores I visit, record the prices of the items that I need, and both the availability and turn-a-round time of any items that need to personalized to insure that I meet my deadline.

Accept or Decline

This is the final step to the cycle: Accept or Decline. At this point of the process, it is easy since there are only two aspects to consider.

Relevance to the Project:

Does this vendor, person, book, item meet the criteria? If not, decline. In my party example, my daughter likes the Care Bears™. Party Stores that do not sell Care Bears™ merchandise are not relevant to this project. At this stage, there is no need for compromise. I will keep moving until I locate a store or online provider to buy the Care Bears™ products.

In your task, you also need to stay focused and find information or vendors that meet the criteria necessary to complete this phase of the project.

Feasibility:

What is the probability or possibility of each of the options that I have identified? Here we find when time and/or money become a factor. Do I have enough time or adequate funds to:

48. Read and comprehend this book,
49. Get this radio ad produced and on the air,
50. Put a deposit on the banquet hall.

This is the time to be realistic. Being realistic with yourself about your capabilities and timelines, and more importantly being realistic about what is feasible and what is not. In my birthday party example, if I find Care Bears™ merchandise but it is overpriced or not of the quality, I expected for the cost, I need to reassess the desired results. If I overspend on paper plates, cups and napkins and severely cut into my cake or food budget, I have to decide if having Care Bears™ items is really going to be that important in the success of the party.

Please do not set yourself up to fail. If it is not possible to achieve some of the objectives you have set, try for those options next time. But more importantly, begin to think about the alternatives. It must not stop here. At this point, you must go onto the proverbial Plan B. In order to do so, you must push through this. When I say push through this, I mean brainstorm, research and accept or decline the alternative. Continue this process until you can find an alternative that you can accept. If you are proactive and innovative, no one will ever

know the difference whether you are working from Plan A or Plan Z.

For example, if you do not have enough time or money to purchase an address list, print 10,000 postcards and mail them out before your event, what are the alternatives to making your event a success with good attendance?

51. Purchase an email list and blast the information.
52. Print the postcards and pass them out at various locations where potential attendees will easily be able to get the information for the event on a timely basis. If your boss asks you why you didn't mail them, explain that you are saving the company money since only 5-7 percent of direct mail advertising results in action taken by the addressee. He will be impressed with your thought process and understanding of corporate marketing budget concerns.

I have been asked by many project managers, what is my decision-making methodology. I adhere to these three core principles:

53. I always get more than one opinion.
54. I always consider the source.
55. I always make a decision that I, alone, can stand behind.

It is important that you establish core principles that you will adhere to in your own life and decision-making situations. These need to be part of your character. If you have never formalized this process, you need to apply your own core principles to your decision-making methodology. If you find that the ones I live by meet your own internal criteria, then use them. Take the necessary time to reflect and develop these and realize when you compromise these principles,

you are on a slippery slope that is not easy to regain your footing from.

Take a few moments to write down the core principles that you currently use in your own decision-making process. Limit these to 3 or 4. You need to be able to quickly draw upon them in times of stress when situations put you under pressure. Put them in your own "voice" and acknowledge they are a true reflection of your beliefs.

Once you have established the decisions, you can know formulate the requirements. It is from here you can begin to properly formulate your plan to accomplish this project. This the spring board of the entire project, this is what will determine success when it is all said and done. With that, you must be clear of the expectations you have for yourself and what others expect of you.

Chapter 11 - Getting Your Project Back On Track

First things first. You have gotten yourself into a pickle and you have no time to read about becoming a successful Project Manager. We will discuss that later, when you have more time and after you're out of this dilemma. So you feel like this is it, people are finally going to see me for what I am, a procrastinator or a very bad planner. In the past it has just been luck or a miracle that my projects got done, now the cat is out the bag and fat lady is about to sing. Have no fear, this too will pass and yes, you will survive. On the other hand, it just could be that you have inherited a failing project and it is up to you to get the project back on track and make it a success. No matter what the circumstance, believe it (because you must first believe) that you can turn this thing around.

So pull it together, get a grip, calm down and stop thinking about tomorrow. It starts with you, you cannot begin to communicate to others or show the confidence needed to complete this project without first checking yourself, more specifically your attitude towards the project. Therefore, you must forget about the past and look forward to success. Tomorrow will come soon enough and you have to believe that you will be totally prepared for the day to come. You will be fully prepared with your project in tack and ready to move on to the next stage. Yes, no project no matter how large or small can be put back on track. One never wants it to come to this, but it can be done. It is going to require some diligence and commitment on your part to get it done and if you are good, it will be seamless to those around you.

What you must first understand before you take on trying to complete

a delayed or misguided project. It is more than just an understanding, but a commitment that is needed to proceed. These principles hold true not only just when faced with a demanding task, but can be applied and as a means by which to structure your life.

56. See this thing through to the end, do not give up,
57. Not everything is going to go according to plan, be willing to compromise. Settling does not mean you are settling for less,
58. Quality should always be number one, regardless of the amount of time you may have,
59. Never let them see you sweat. This goes beyond just being calm; this is a character trait, one I believe can be learned.
    - Never overreact to a situation,
    - Remain above the conversation,
    - Be the problem solver and not the problem.

With that said, there is one very important factor that I have left out. For most, it will be a mindset change and for some they will get it immediately.

Time is not a factor.

Time has no bearing on your project at this point. There are many time management books on the market; there are even professionals who specialize in helping you to better manage your time. This is what they will not tell you, time is really not a factor. I can have one year to plan a party or one hour to plan a party, I can succeed at both.

You may say if time is not a factor then why do many projects fail. The key to successful project management is not how much time a

person has; it is what the person is willing to settle for based on the time remaining. Let's make this plan. You give me a year with the proper budget; I can plan a spectacular event at the venue of your choice. Give me a day and I can plan a party for you at the McDonalds playland. Failure is in the eye of the beholder, nevertheless to say in both cases, a party will be had and hence the project will be complete. What takes you from a completed project to a successful project will explored later, but even then, it is about planning and organization and not all together about time.

Back to the project, let's get it back on track and complete (and if lucky successful). Below you will find outlined before you steps to getting an existing project back on track. The point in which you find yourself in the project timeline will vary from reader to reader. Regardless of where you are, there is still a need to set the foundation. I will state again and although you have limited time, it is not a factor. Moreover, it will not be a factor if we take these few minutes to start from the beginning. If you are going to put your all in to turning this around, let's make sure you totally understand the commitment. This brings us to Step #1.

Step #1: Writing a Project Statement

It is very necessary to confirm the purpose of the project. If this project was an assignment, go back over your notes and if necessary go back to the source. Make sure you totally understand what you are to produce or what the outcome is supposed to be.

Here is where you describe the purpose and outcome of the project. Your project statement should consist of four statements. This

statement should range from four sentences (minimum) and two paragraphs (maximum). Take the time to complete them; success is contingent on what you discover her in these steps.

60. **Plans of Action (i.e. create, plan, implement, etc.)**
61. **A Definition of Success**
62. **The Impact**
63. **The Result (s)**

Sample Project Statements…

64. Create and implement a comprehensive Microsoft Outlook training plan to all employees. Each employee upon completing the training should be able to successfully use the functions and tools associated with everyday use and their job responsibilities.
65. Plan and execute a birthday party for a 3-year old girl, consisting of food, entertainment, games and party favors. Venue for the party should have the capacity to hold 15 children, which will be accompanied by their parents. The theme of the party should be directly centered on Disney characters.

Step #2: Creating the Project Detail

In one place compile all the information, you have. What information am I referring to; reference material (contact info, vendors, etc.). This

information could be on scratch pieces of paper, in an email or on a voicemail. On a piece of paper or on your computer begin two rewrite all the information you have already gathered or that has been given to you. There is no time for organizing this data at this point. Just make sure you get it all in one place. Record everything, record it regardless if you think it is relevant to the project or not. When you are done, throw everything away. Write it and then toss it, nothing (with the exception of receipts) must remain, but the list. We will refer to this as the Reference List. The purpose of this exercise is twofold; one it allows you to get rid of the clutter and two it makes you aware of what you have so that you may reference it later.

With that complete, you can probably identify some of the deliverables (task) of the project. Start with extracting some of the simplest of task; facilities, printing, decorations, staffing, programs, processes from your Reference List. Double check those task against the project statement, adding any task you missed. A good resource is the use of the internet, it is the best way to fill in the blanks and help aid you in the task of creating a list such as this. Do this by placing the project name in the search field. For example Steps to implementing a Training Plan, Things to do when planning a party or Starting a New Pizza Business? Do not fear, you are not going to capture everything, but you are going to get pretty darn close. We will refer to this list as the deliverables.

66. **The launching of a new website (youneedthiswhen.com)**
    - **Website Development**

- **Website Testing**
- **Beta Period**
- **Technical Support**
- **Marketing Communications**

67. **2-year old Birthday Party**
    - **Venue**
    - **Decorations**
    - **Invitations**

Step #3: Establishing the Project Deliverables

The last step in creating the task list is to establish the specifications associated with the task. This should not be that hard, this is a matter of taking the task and detailing what exactly the outcome will look like. Most if not all of this will come from your notes and if necessary consult with the stakeholder to determine the requirements. For example, a venue of preference or a preferred color scheme. If you are the stakeholder, then it is up to you to fill in the blanks.

68. **A one-day Microsoft Outlook training session** c**onsisting of how to**
    - **Compose, Send, Open, Reply and Forward Emails**
    - **Schedule Events**
    - **Create Task**
    - **Use of Tools**

Whatever the case make the requirements clear, formulating this in writing and getting a consensus in writing is very important.

Step #4: Formalizing the Plan

You know have the info needed to formalize the project, there is just one very important component missing; budget. This information if applicable can be identified by the stakeholder. In some cases, the budget will have to be addressed after the due diligence has been completed. Regardless, proceed with caution. With the information, you have in a word document or within an email identify the following.

69. Project Statement
70. Project Deliverables
    - Project Task
71. Budget
72. Stakeholders

With the project detail identified and the approval given to proceed given by the stakeholders, you are ready to begin executing the plan. More than likely you have a lot to cover and it may be a little overwhelming. With two highlighters (different colors) in hand highlight the task that you have already started in one color and task that you have not began in the other.

Step #5: The 15-minute Blitz Cycle

The intent of this process or cycle of events is to get you through a series of task quickly and consistently. You now have a list of task that has to be completed in order to make the project a success.

73. **Confirm the Requirement,**
74. **Is this within my budget?**

75. Confirm the delivery and completion dates

With each task in mind, ask these qualifying questions. You must have a yes to ALL of them for this task to remain a component of the project. Here is the catch; you only have 15 minutes per task to get it done. Blitzing is a defensive maneuver that is done quickly and without warning. Because you do not have a lot of time, blitzing the list is by far the most important maneuver in getting this project back on track. There is no time for idle chatter and small talk. Remember to be realistic, be honest with yourself; there is nothing worse than trying to pull the wool over your own eyes.

If it is absolutely necessary that this task be met (based on the requirements), then you must explore every possible alternative until you get yes to all of the questions. However, keep in mind each alternative only has 15 minutes to resolve itself as well. If in 15 minutes you cannot get a resolution to the task then it is not feasible and you must move on.

In an attempt to answer these questions, you will have to do a little research. There are two types of scenarios you will find when trying to conclude the feasibility of the task. If you have already assigned a task or hired a vendor to complete a task, this task is already in play. That is the first scenario. The second scenario is that this is new, no research or contact has been made to complete this task. This is where most people find themselves, starting from scratch.

The Task is already in Play

For some the research has already been done (refer to the reference

list) or you have already assigned this task and it is just a matter of follow-up. This is what I consider a task already in play. With the task already in play, all you have to do is contact the vendor or the person you have delegated the task to. This is where the Reference List you complied comes in, refer back to a contact or a resource you found and contact them if necessary to help assist you in establishing whether or not the task is feasible. Keeping in mind the qualifying questions, what you are inquiring about is a status.

76. **If necessary, what needs to happen to get this task back on track?**

If for some reason the what affects your qualifying questions; more money, more time and it is just not possible, negotiate the alternatives or abort this option all together. If you have to abort this option, then it becomes a new task. Developing a new task will be discussed next.

If you make the call and know one answers, you must surpass the contact and go directly to the source. If they leave you on hold to long, hang up and move to the next task. When you complete that task call back. In all my years of doing this; one of two things will happen, they will call you in the in turn or someone will be immediately available to take your call when you call back. When finished ask for the responses in writing, conclude the call and add the contact info to the spec list (add a new column: contact info).

Developing a New Task

By now, I am sure you get that a project is made up of a multitude of task. Later in the book, you will see why I expose you the reader to a

project on a task level instead of always referring to the project whole. It is simple; if a person eats a whole chicken, they consume it in bits. This why the development of the task is so important. Let's break down the development of a task, there are three elements: 1) The task, 2) The Task Specifications and 3) The Task Resource. You now have 2 of the 3, the task and the specifications.

Obtaining a resource will by far take the most time, but even this process has to have limits if you are going to make it. The objective is to get an answer, no matter what and you have 15 minutes to do it. Again, the qualifying questions apply and again if the person you contact cannot give you a yes to all of them then you must hang and try again.

For example… I need to print a flyer for this project, but am unsure of the cost and lead time needed. I pick up the phone with requirements in hand and call a local printing company or our company designated print vendor. The first call I make, I get no answer. I keep trying, calling the next printer. I pick-up the phone book or use the internet if necessary, but I must get a yes to all three of the qualifying questions. I keep trying until I get someone, the clock begins. I start by asking them, do you print color flyers? If the answer is yes, I go to the next questions; can you print 1,000 color flyers by January 10th? If the answer is yes, I go to the final question, what is the cost to print 1,000 flyers? If the cost is within my budget, this task has been qualified. When finished I ask for the quote in writing (the quote should include the task deadlines), ask for the contact info (add record it on the task list) and conclude the call.

Step #6: Devise a Plan

Based on the outcome of the Blitz you now have a plan and all you have to do is document it. Later we will discuss the various types of methods one can use to organize dates and data, for now I will use the generic term: calendar. To you this calendar can be a computer-based calendar, like Outlook or a PDA. On the calendar, you will record the following dates (if applicable) in relation to each task…

77. **Requirement Date-** This is date material or information is due to the vendor and/or designated person in charge of completing the task,
78. **Payment Dates** – Dates in which task requiring payment(s) are due,
79. **Completion and/or Delivery Date** – Just a reminder, this is not the project completion date, this is the date you established earlier in step 3 (Creating the Task List).
80. **Milestone Date –** To make it simple this is the ½-way date between the Requirement Date and the Completion Date. This is your follow-up date; this date is unknown to everyone, but you.

Step #6: Managing the Plan

Now it is just a matter of managing the plan, following up with each person and/or vendor at the milestone date to secure that they are on schedule, producing the correct thing and still within the budget. If you find that, you get a no to one of the question when following up at the milestone date. The question must be asked, what needs to happen to get it back on track. If it is not feasible, you must go back to step #?, researching, finding an alternative that can give you a yes

to all three of your questions. The good thing is that you should have some to contact from your original research and because time is not a factor, you will complete it. Bad news, it may not be exactly what you wanted. These are the risk we take as project managers, I have faith that you will prevail.

Note:

If this project involves multiple people and you are the lead project manager. There will be a point in time when you will have to Rally the Troops, communicate the plan. A meeting unless to gather information for step #?, was not necessary up to this point. At this point, you are prepared with details and schedule in hand to give the marching orders. Different from a project that has not went array, you so not need their input at this point. You are here to delegate, keeping in mind that it is still your sole responsibility and the more you delegate the more people you will have to follow-up on. Establish an agenda before the meeting and command the meeting.

81. Positivity first
82. Problem Areas
83. Review the Budget
84. Reinforce the deadlines
85. Crete Millstones (follow up dates)
86. Positive reinforcement

So, your project is back on track. Please keep in mind that this was a means to get your existing project back on track. Projects that are well planned and executed do not require the stress associated with the immediate presence of failure. There are others stresses, but

successful project managers use the stress to strive. Successful project managers experience personal and career growth. Read on, this can be you. You can be a successful project manager every time you manage a project.

In the next chapters, you will have an open and honest discussion about your personality and develop steps to counter your potential limitations. You will learn how to set the stage for a project, define the task and execute. Most importantly, you will discover ways of handling problematic situations, delays and hopeless situations.

I am excited! You, my friend, are on your way to becoming a successful Project Manager.

Chapter 12 - Keeping It Moving

There are two distinct areas that you need to be able to objectively follow up. The first is following up on those you are dependent upon for support, assistance, and task completion. The other is being able to follow up on your own progress in achieving the ultimate goal. Following up on others is by far easier than following up on yourself. Both are mission critical and the tips provided here should help you be able to achieve both with professionalism and tact.

When it comes to following up on others, I must stress the following: Do *not* assume anything. This point brings us back to your role as the originator, visionary or assignee responsible for the success of this entire project. You must follow-up on every detail and every one on your support team involved. Do not assume that because you have not heard from a vendor or a support person to whom you have delegated a task that everything is going according to plan. No news is not necessarily good news! As the project manager, you should be initiating contact!

If something has gone wrong after you have delegated a task or assignment, your team member may be sitting back in hopes that they can fix the problem or somehow catch up on the assignment before you follow up. If you want to maintain a relationship with them in the future, do not get overly upset or emotional. Even though you are going to do everything possible to prevent missed deadlines and mistakes, it is unavoidable. As Successful Project Manager, you may have developed your Contingency Plan and can now set that plan in motion. Now, it is not a matter of assigning blame, but solving the problem quickly and keeping the project on track.

Following up is critical to the overall cohesiveness of the team working on the plan. First, it signals to your team that this project is important to you. Timely follow up and consistent status reports cuts down on the potential for error. Finally, it keeps the process moving, ensuring that you are aware when tasks are either on target or behind schedule. This allows you to give input, encouragement, and show your personal interest for the project. There are no magic methods to follow-up other than to pick-up the phone, send an email or go to the site to check the status.

When inquiring about deadlines and timeframes, always get and give exact times and dates for a phone call, meeting, report, or delivery. When you begin to talk to people in vague terms, (*a few days*, *as soon as possible*, or *by the end of the week*), you have instantly miscommunicated. My personal "ASAP" may not be the same as yours; what might be immediate to you may be different for me. When you set a specific time or date, you are entering into a verbal agreement that leaves no room for interpretation.

You may be wondering, when is the appropriate time to initiate a follow-up? I offer a simple equation that generally gives you consistent follow up times: take the time between now and the due date and divide by three. This is a simple benchmark of when follow up should be initiated. When you follow up the first time and everything is on schedule, you have a mental image of being one-third of the way to success. At this stage, if there seems to be a problem, you begin to follow-up every day to get it back on track. If after ten days, the problem still exists, you assign the task to someone else.

If on the second follow-up, everything is on schedule, you are probably good to go until the last and final time to check in. If there seems to be a problem, you begin to follow up every day until the task is back on track. If after five days, the problem still exists, you ***must*** assign the task to someone else. At this critical point in the project, time is of the essence.

The last follow-up is crucial. This usually occurs within a few days of the project deadline. If everything is on schedule, recognize this is the result of the planning and follow up that you have done up until now. If everything is not as you anticipated, it may be too late to reassign the task. If that is the case, you must make a decision. You must go back to basics: Brainstorm, Research, then Accept or Decline the solution. This is a time you have to go into action and take responsibility for success of the task. This task is critical to the success of the project.

Now let's talk about you. How do you follow-up on without tricking yourself into believing that putting off your deadlines and timelines until tomorrow is acceptable? You MUST hold yourself accountable just like everyone else on the project – no special treatment! And just as you did for the personnel you hired or the vendor you delegated responsibility, you take stock of your tasks and deadlines and divide it by three. You then follow up and assess your progress at the same time you are making the rounds of following up on your staff and vendors. The ultimate success of your project rests on ALL participants being held accountable – including YOU.

Chapter 13 - Problems and Solutions

I preface this chapter by stating that as long as you live, problems are going to occur. If you do not have any problems, you may want to consider whether you are truly living life. When a problem occurs, it is usually during the most intense time of the project, or one-day or one hour before deadline. Don't panic. Keep in mind if the problem had shown up any earlier in the process, you could have come up with an alternative. However, you do not have that leeway at this point. You have only the realities that have been given to you. At this critical time, here is what you need to do:

Take a Deep Breath

Always remain calm and resist the urge to overreact. Now is not the time to dramatize or appear scared or paralyzed. Remember that everyone is looking to you for guidance; they will follow your lead. Use phrases, such as "let's work through this" or "stay focused" or "everything is going to be okay."

Keeping a level head in a hectic or chaotic situation is very important. The true art of calmness comes from believing everything is going to turn out for the best -- even when it does not go according to plan.

Gather the Facts

Begin to gather the facts. This can come from almost any source: the person you delegated the responsibility, a vendor, or your own experiences. You are looking for the facts only. It is human nature at this stage of the problem for people to start blaming others or concentrating on the problem and not the solution. It is your job to gather the facts quickly to develop a workable and acceptable solution.

Run the Scenarios

Once you have all the facts, it is time to *run the scenarios*. What do I mean by that? Unlike the cycle of decision-making, you do not have the time to write down information or do research to make a decision. In one thought, you brainstorm a solution, assess the probable result in your mind, and determine whether or not that result is acceptable. You keep doing this exercise until you come up with at least two end results that are acceptable. These two or three scenarios are going to be the solution to accomplishing your plan.

For example…

A musical artist was to have shown up an hour ago as entertainment for a networking event, and it is now one hour before the event starts and your artist has not yet arrived. Calmly you begin to gather the facts by calling the artist's manager and asking why he has not shown up. It appears the artist was overbooked, his manager left a message on your staff member's voicemail (who was called out of town for a family emergency), and no one realized the artist was not coming until this moment.

Instead of placing blame on why the message was not forwarded or dwelling on the overbooking error, you begin to *run the scenarios*. Here are a few possibilities:

87. Play the artist's music on a CD player during the event and announce the artist was not able to attend due to a previous engagement.
88. From your previous research, call another artist on your list and see if he available to fill in. If the back-up artist cannot come until later than you planned for a performance, play his music

until his arrival.

89. Go without any music and exclusively focus on the occasion as a networking event.

What is the key to success here? You must act as if it was all planned this way. Never admit failure unless it is absolutely necessary. Hold it together! Do not let others know what you are feeling or berate anyone during the event. Your breakdown and analysis of the situation can wait until the event is over and the guests have left.

After each project, you must take the time to reflect on the lessons learned and bring about closure. It is a vital step to your success as a project manager and can be done in four easy steps:

90. Consider some of the processes and formulas you found about the process that you will consistently implement in the future for projects that you are responsible for managing or completing?

91. Take this opportunity to examine the impact of what has been learned. Reflecting back on earlier projects, identify any mistakes or breakdowns in process that will need to be fixed or addressed next time.

92. If you have not already done this, you need to create a master file. This file can be in the form of an electronic database, address book or rolodex. The purpose of this file is to gain easy access to already established contacts for future projects. This file should include vendors or contacts that you would feel comfortable calling upon again.

Continued affiliation with these contacts is valuable because they:

93. Gave above satisfactory service
94. Provided competitive pricing
95. Served as a valuable reference and resource
96. Lastly, do not forget to say *"Thank You"* to those people you made contact with during the course of the project. You do this for two reasons:

- Because it is the courteous thing to do
- You never know when showing your appreciation might benefit you in the future

Although, you may have significantly decreased the "You Need This When?" moments, there will be some issue or problem that happens that is beyond your control. It is at that moment, the vendor or contact will remember your appreciation for their services and make an extra effort to help you out with this situation.

What are some of the things you found about the process that you will consistently implement in the future for projects that you are responsible for managing or completing? List them below.

Let us take this opportunity to examine the impact of what has been learned. Reflecting back on earlier projects, identify any mistakes or breakdowns in process that will need to be fixed or addressed next time.

Good Luck with your Journey to becoming a Successful Project

Manager. It has been my pleasure to give you the benefit of my experiences. Please let me hear from you on your success!