

Project Management for Everyone (a non-technical approach)
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Why is a non-technical approach needed for project management? Because projects occur at every level of all organizations regardless of industry or profession. An effective project management process is beneficial for everyone. Furthermore, a majority of today's workforce is involved in multiple and often simultaneous projects with little or no formal project management training. It is imperative that non-PMP project managers understand the value of utilizing a simple, practical approach to help them effectively work on and manage their projects successfully.

Hurdles for the non-PMP project manager

1. **Time** – The majority feels overwhelmed by too much to do and therefore unable to create the time to do the planning needed. The reality is that there are often fewer people doing more things with fewer resources in exactly the same amount of time.
2. **Training** – Most haven't been taught a PM process that is applicable to their types of projects. If they have been exposed to PM training, it is either in MS Project (which many find overwhelming) or they have been given PM templates that are too involved for their level of projects.
3. **Assumptions** – The non-PMP project manager, like many of us, doesn't know what he or she doesn't know. They need light shed on incorrect assumptions that can negatively impact their projects, their productivity and, ultimately, their lives.

The trouble with time

One way to look at the root of the issues for the non-PMP project manager is to look at their struggles with how and where to spend their time. Not enough time is the excuse for not doing many of the things a project manager needs to do in order to run a successful project. In order to get a clearer understanding of one's time, it is helpful to look at Stephen Covey's Time Matrix, which he made famous in his book, "The 7 Habits of Highly Effective People." (Exhibit 1) The Time Matrix is a way to look at how we spend our time. It is similar to tracking one's finances. If you have ever tracked your finances, the big ah-ha is the shocking realization that all those small expenditures add up very quickly into large amounts of money. The idea behind tracking one's finances is to make people aware of where their money goes so they can make more conscious choices of how to spend their money. The same is true of one's time.

Here is how the Time Matrix works: All the events that make up our lives fall into one of four quadrants.

Q1 situations are both urgent and important. Urgent is defined as requiring immediate action. Importance has more to do with how much we value something. An example of a Q1 situation would be an accident. If we see an accident it is important that we stop what we are doing and take immediate action. Not only is it important, but it is also urgent that we respond quickly. More examples of Q1 include project crisis, working on something just before it is due, and putting out fires at work.

Q3 situations have a low sense of importance and a high sense of urgency. A good example of a Q3 would be a ringing telephone. Think about what you do when your telephone rings. This is not a trick question. Most of us answer after looking at caller ID. The ringing creates a sense of urgency and the caller ID tells us how important it is to us right now. Then we decide how to act by answering the phone or letting it go to voicemail. Much of our workday is filled with Q3s, such as unproductive meetings, many e-mails, unimportant phone calls, minor interruptions. Often people approach us either via e-mail or in person with what they consider to be a crisis only to find out with closer examination that it is really not that important.

Q4s are situations that are low in importance and low in urgency. An example would be if you ever had a friend who disliked their job and complained about it every time you saw them. At a certain point you think to yourself, “This is a waste of my time.” Everyone at some point needs to vent; the point where it becomes a Q4 is when it crosses the line into excessiveness. Quadrant 4 is the quadrant of waste and excess. It includes situations such as excessive socializing at work, procrastination and busy work.

Q2s have a high sense of importance and a low sense of urgency. A good example is taking care of oneself. It is important to eat well, exercise and get enough sleep. Yet many people only take care of themselves when there is a problem, when it becomes a Q1. Being proactive, taking care of situations in a timely manner, this is acting in Q2. This is the quadrant of leadership. It includes situations such as planning, prioritizing and preparation. Project management techniques and processes are Q2 activities.

Exhibit 1 – Time Matrix

	Urgent	Not Urgent
Important	<ul style="list-style-type: none"> • Crises • Pressing problems • Emergencies • Deadlines 	<ul style="list-style-type: none"> • Preparation • Prevention • Planning • Relationship building • Values clarification
Not Important	<ul style="list-style-type: none"> • Needless interruptions • Some meetings • Other people’s minor issues 	<ul style="list-style-type: none"> • Trivia, busywork • Time-wasters • “Escape” activities

When asked which quadrant we should be spending our time in, people will readily answer: Q2. When asked which quadrants we actually spend our time in, people hesitantly confess: Q1, Q3 and Q4. The truth is that we do spend time in all four quadrants, including Q2. The reality is that the more time we spend in Q2, the less time we will be forced to spend in Q1... and this is the basis for everything we talk about in successful project management. Have you ever worked on a project only to have something go wrong and thought to yourself, “If only someone had thought about this ahead of time we wouldn’t be in this mess right now”? Intellectually we understand that if we spend more time in Q2 planning we will have fewer Q1 problems. Unfortunately, intellectually understanding a concept and putting it into practice can be very different.

Let’s take a look at a typical example of a Q3. It is the end of the workday; you think you will be heading home at a reasonable time. As you are packing up, someone higher up than you, let’s say your manager, comes by and says, “I have to have this report on my desk first thing tomorrow morning”. You drop everything, stay late and get the report done. The next day you catch your manager around noon and ask, “Did you get the report? Have you looked at it yet?” And he or she says, “I haven’t had a chance to look at it.” What do you feel like doing to this person? Most answers are not nice or legal. The question is: Why do people create such a sense of urgency over something that really isn’t that important? There are a variety of reasons, including:

- It makes them feel important
- It becomes a habit and is often part of the organizational culture
- Because they can get away with it
- Because they are disorganized

- Because they don't trust the person they are asking to do the work

It is this last one that we need to discuss in more detail. Why would someone not trust that a person would get the work done? Because often, if we tell someone we need a report by Wednesday, we may not see it until Thursday. Therefore, we tell people we need it right now, so the request will not slip through the cracks. Unfortunately, we tend to do a lot of it to each other.

Here is an example of what happens to a lot of people. Imagine someone just got out of a meeting; they have five action items that need to be done a.s.a.p. Then the person sits down to check e-mail and there are 10 e-mails to address right away. Next the phone starts ringing and people come by, and there is another meeting to go to and on and on and on. How do you feel when this is happening? Overwhelmed, exhausted, stressed? What do we tend to do when we are overwhelmed and stressed? The answer is we tend to shut down, we procrastinate and we go to Q4 and get involved with busy work and low priority items.

We often bounce from one crisis to the next without verifying their validity. And when we can't take it anymore we default into Q4. We stay in Q4 for a while, then do some more Q1 and Q3 activities until we get burned out enough that we default back into Q4. This is what we call the Bermuda Triangle, because we can't get out. We can't get into Q2 because we don't have the time or the energy. Therefore, the Q2s don't get done and eventually, the Q2s become Q1s. This keeps us in the insanity. Ideally the majority of time spent in project management would be on Q2 activities. Before we give people the skills of project management we have to understand the reality of their day-to-day life.

The best way to help people is to help them to realize:

- What is happening,
- Why it is happening, and
- How to handle it

Once people recognize what is happening, they are in a better position to manage their time. The Time Matrix is a great visual tool that enables people to really grasp the importance of planning. Being able to identify when I am in Q4 allows me to pull myself out of it. On an average, U.S. workers waste about:

- 2 hours per day, which is
- 10 hours per week
- 40 hours per month
- 3 months per year (Malachowski, 2005)

The saddest part of this is that most people don't put in a regular 8-hour workday. They are often coming in early, staying late and checking e-mails after the children go to bed. Because things aren't getting done during work hours, they ultimately have to be done during personal time. If we can get people to see the negative impact on their own lives, we can motivate them to seriously look at how they spend their time.

The biggest accomplishment for most people is to learn to differentiate between Q1 and Q3 situations. Typically, people don't come to you and say "I have a Q3 and I am going to try to trick you into believing it is a Q1." They come saying, "I have a crisis. Stop everything and do this right now." It is up to us to differentiate between Q1 and Q3. We can do that by asking simple questions, such as "When do you need this?" It may sound simple and logical, but the fact is we often assume that everything is needed right now. When someone asks you if you can have it back to them right away, it may sometimes be better to say "Let me get back to you by ___", then give them a time that works for both parties. The key then is to make sure that you have it back to them by the promised time. If you don't, the next time they need something they're going to say they need it immediately again because they can't trust that you'll have it when you've promised.

The problem is, in our society we tend to reward people when they are in which quadrant? Q1. And we give lip service to which quadrant? Q2.

Some of the long-term outcomes and results of spending a lot of time in Q1, Q3 and Q4 include:

Q1 – Burnout, stress, turnover, poor quality

Q3 – Stress, frustration, anger, sense of being used, resentment

Q4 – Laziness, boredom, lack of fulfillment, unemployment

Some of the long-term outcomes and results of spending even a little time in Q2 include:

Q2 – Productive, in control, balanced, proactive, more energized, greater success, better relationships, less stress, fewer Q1 crises

In order for the non-PMP project manager to utilize project management processes, we need to help them understand the value of planning. If they spend more time in Q2 planning, they will not have as many Q1 crises. In order to do this, they need to understand how to identify and manage the Q3 interruptions that tend to consume our lives.

Once people understand why it is so difficult for them to find the time to plan and the importance of planning, then they need to know how to do planning in a way that is simple for them.

Phase #1: Initiation

Assumption #1: I've been told everything I need to know to do this project.

The key stakeholders and I have the same understanding of the scope of the project

Everyone is aware of what happens when we assume. In the first phase of project management, assuming is the greatest pitfall for the non-PMP project manager. They assume some or all of the following:

- The project manager has all the information needed to begin the project
- Stakeholders have told the project manager everything he/she needs to know
- Stakeholders and the project manager have the same understanding of the project
- The project manager should not ask too many questions and run the risk of looking stupid
- The constraints of time and resources have been set and are inflexible
- The project manager cannot ask for more time, money or resources because he or she will not get them
- There is not enough time to ask questions and to do planning

The danger of assuming is that often we do not realize we are assuming until it is too late. Non-PMP project managers often don't know what they don't know. They are hard-working, dedicated professionals who are very competent in their area of expertise and are overwhelmed by the amount of work they have to do on their projects. With the appropriate level of training, these individuals can go from overwhelmed to in control.

For the non-PMP project manager the initiation phase is mostly a clarifying phase. Trouble often begins when one person initiates the project and then the project manager has to come in and execute it. Since the project manager assumes they have all the information required and are already stressed by too much to do, they jump into the execution phase without much clarifying or planning.

The Time Matrix allows the project manager to clearly understand the value of planning. Once they understand the importance of planning, they then need to know how to clarify a project. Most non-PMP project managers do not

know what questions to ask of their stakeholders, and may feel intimidated because they think they should know what the key stakeholders want in advance.

It is important to list out the questions that need to be answered at the beginning of a project. The PM should draft an initial copy of the scope statement, then discuss it with their Project Sponsor to make certain everyone is on the same page while avoiding as many assumptions as possible. It is also critical that the document is simple, preferably something that will take no more than 20 minutes to draft. The more complex and time consuming it is, the less likely people are to do it. Everything is relative; scoping a project is usually proportionate to the size of the project; smaller project = shorter scoping time. The point being that the more complicated the document is, the less likely people are to actually complete it.

Key Scope Questions:

Who: Who are our stakeholders? Who will use/buy the project?

What: Deliverables and Requirements – what are we doing? What are our deliverables and requirements? What are the must-haves, nice-to-haves and must-not-haves?

What: Constraints – part of the “what” includes the constraints of time and resources. What constraints do I have to work within?

When: When it is due? How much flexibility is there with the deadline?

Where: Where will it happen, U.S. or international?

Why: What is the justification for the project beyond “because I said so”?

How: How will success be defined? Too often we confuse a deliverable with success: “I gave you what you asked for. You didn’t say it had to do that!”

(The planning of how to accomplish the project comes in the next phase)

The PM should document answers to these questions in writing. Documentation will help them understand what they know and what they don’t know. This process allows them to become aware of their assumptions. Only then can they clarify these assumptions with the project stakeholders.

Phase #2: Planning

Assumption #2: That shouldn’t take very long to do.

The greatest pitfall in the Planning phase is the assumption that the project won’t take very long to accomplish. This is compounded if the first phase (Clarifying the project) was done incorrectly or not done at all. Timeframes are then based on faulty information. Therefore much of the project may have to be redone to accommodate scope creep that should have been identified during the scoping of the project.

The following are just a few of the many things that are often overlooked during the Planning phase:

- The multitude of small details that make up a project
- All the interdependencies of tasks
- The other work that team members must continue to do in addition to this project

Often it is found that people are afraid to look at just how much work there is to do on the project, so the project gets put off until it can’t be put off anymore, until it becomes a Q1. Giving people some quick and simple planning tools can help in this area.

It is helpful to get the PM to break planning into two separate steps:

1. Brainstorm of all the tasks
2. Create some type of a formal WBS, such as a Gantt Chart either in Excel or MS Project

The PM is often required to submit a Gantt Chart to management. But because of time pressure, they bypass any brainstorming process and therefore miss many of the details that create realistic timeframes. Tools such as mind mapping, fish boning and post-it brainstorming can be helpful in getting people to see the details of what is involved in accomplishing the project.

When the PM separates out these two steps it is easier to see the true scope of what is involved in the project. Brainstorming identifies the details of the project and then the Gantt Chart acts as a communication and management tool for the PM. Too often, the non-PMP project manager uses a Gantt Chart to put together a project plan without any brainstorming, only to realize later that there were many steps or dependencies that were never identified. This leads to more problems when management expects the PM to manage the project according to the incomplete or erroneous Gantt Chart. What follows is usually a lot of blaming. The PM blames management for being too unrealistic in their expectations of the project, and management blames the PM for not accurately informing and adhering to the timeframes.

Phase #3: Execution and Control

Assumption #3: If “they” would just do what they are supposed to do, I wouldn’t be having these problems.

For the non-PMP project manager we have combined the Execution and Control phase of project management. This is where it all comes crashing down if the project manager has not done a thorough job of clarifying and planning. If the PM makes assumptions in Phase 1 about the scope of the project and more assumptions about the timeframes in Phase 2, then Phase 3 is where all the problems come to light. It is in the execution and controlling of the project that it all starts to fall apart. People aren’t doing what is wanted or required of them and everyone starts to realize there was very little clarity from the beginning. It can be very difficult for the non-PMP project manager to take responsibility for these problems if they haven’t been trained to plan a project correctly.

Most people are good people, doing their best to do a good job. It is very frustrating to get to this point in a project and find it all falling apart. There tends to be a lot of scope creep on projects that aren’t done correctly. This can cause all sorts of unnecessary stress on the project manager and the project team. When the non-PMP project manager is taught some simple, practical project processes they are able to take charge of their projects and this phase becomes a lot more manageable.

Phase #4: Closing

Assumption #4: It’s finally finished; let’s get started on the next one. Don’t look back.

Many project managers are so happy to be done with their projects that they turn them over and quickly move on to the next. Again the assumption here is there isn’t time to do a lessons learned. It is difficult to really analyze a project if one does not understand the project management process. Once the non-PMP project manager understands the project process it is easier to look back to see what went wrong and what worked well. It is very discouraging to not know why we keep having problems, even though we try hard to do it right. It is a very satisfying experience to be able to clearly identify areas of improvement and areas that worked well that can be repeated.

Well-managed time and elimination of assumptions can mean the difference between a mildly successful project and one that sets the standard. For the non-PMP project manager, an effective project management process – augmented with tools like the Time Matrix – is essential to that success.

References

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