

Jeff Oltmann on Mastering Projects

Backpacker's Guide to Lightweight Project Management

Overwhelmed

The field of project management has been around for decades, and the accumulated technical knowledge often feels overwhelming to newcomers. For example, my favorite introductory project management book gets longer with each new edition and now weighs in at 462 pages. Both academic researchers and practicing project managers add new expertise to the field daily, as they explore new ideas such as Agile Project Management.

In my experience, this formidable body of knowledge intimidates many organizations that are newcomers to formal project management. These newcomers can see the benefits of good project management merely by observing their competitors, but they despair at their ability to adopt an extensive set of project management best practices. They are starting from a very low level of project management maturity. Chaos reigns, and the organizational changes required to implement the full suite of project management techniques are too great. They need a lightweight, simple way to start – a backpacker's approach to project management.

I have helped many clients start project management in organizations that had very little of it. First, let me share six of the lessons I've learned about introducing project management where there is none. Then in the next section, I'll tell you what I load into my lightweight project management backpack.

Six Lightweight Lessons

1 Project management should be a servant, not a master.

Project management is merely a tool to accomplish business goals. As one of my clients says, "the proper amount of project management is that which is barely sufficient to successfully accomplish the objectives of the project. Any more than this is gold plating."

2 Start by building a common language.

People can't work together to improve project management practices until they have a way to talk about it. This includes clearly defining key project roles.

3 Contextualize project management.

There are no turnkey project management solutions. Base your solutions on the best practices of project management, but customize the techniques and language to fit the specific goals of the unique organization. When backpacking, this typically means favoring simple, low overhead and possibly inelegant techniques above theoretical correctness.

4 Pick your battles carefully.

Focus on the 80% solution – introducing a small number of project management techniques that will yield the highest immediate benefit to the business. It is much better to help newcomers deeply understand a few powerful techniques than it is to give them surface knowledge of many.

5 Everything is about organizational change.

Introducing PM into an organization that doesn't use it is mostly about changing ingrained organizational behaviors. Use excellent change management techniques. Here are a few of my favorites.

- Use participative design and implementation techniques to get widespread buy-in and involvement. Find ways to get users' fingerprints all over the PM solution so they have a sense of ownership.
- Make sure the solution improves everyone's job, so it has staying power. Otherwise, it is just another management fad.
- Design for quick wins. Get at least some immediate and highly visible victories so the organization does not lose interest.
- Build strong and persistent management sponsorship. Dilbert aside, you simply cannot make significant, long-lasting changes without it.

6 Technology comes last.

When loading your backpack, spend the majority of your up-front time deciding how the people, process, and organizational aspects of doing projects will work. Software and technology play a supporting role and come later. Bringing specific software in too early threatens to shift focus to the software's capabilities, rather than on how to solve the business problems.

What Goes in the Backpack

How do you accomplish this? I recommend that organizations new to project management load their new lightweight project management

backpack with three things: a common project framework, a starter toolkit, and rudimentary project governance.

First, define a simple project framework that the organization will use to run multiple projects in a consistent way. This framework contains:

1. Agreement on the key roles related to projects, at a minimum the responsibilities of project leader, project team member, and project sponsor.
2. A project lifecycle - a handful of high-level project phases that provide a memorable structure for everything else to fit into. For example, I often use a sequential project lifecycle that has four phases: define, plan, execute, and close. Embarrassingly simple? That's good.
3. Two or three standard approval points (sometimes called gates) sprinkled throughout the project lifecycle. Each time a project is ready to pass one of these points, the right people must review it and agree that moving forward still makes business sense. Hint: Provide checklists that help project teams prepare for gates, as well as encourage reviewers to ask the right questions.

The second item in the lightweight project management backpack is a starter toolkit. It should contain a *vital few* project management tools that will have a very high impact. Include:

1. A flowchart of steps for project teams to follow when running a project. Keep it simple and put it on a poster.
2. Templates, checklists, and examples that people working on projects can use. Write them in simple language

that is free of project management jargon. This helps part-time, “accidental” project managers. Start small, and add over time. The table below shows the foundational tools that I put in a small starter toolkit:

Project Phase	“How-to” templates, instructions, and examples
Define	<ul style="list-style-type: none"> Define the project’s business value and expected deliverables Identify the key stakeholders and decide how to work with them
Plan	<ul style="list-style-type: none"> Create a schedule Identify and manage risks
Execute	<ul style="list-style-type: none"> Monitor progress Make steering decisions
Close	<ul style="list-style-type: none"> Transition the project’s output to users Learn lessons so future projects will be better

The final item in the backpack is rudimentary project governance. This is a fancy term for how the new project management system will be managed. Governance systems can be quite sophisticated, but most backpackers benefit from very simple governance.

Therefore, concentrate on establishing a forum and protocol for

- Regular reporting to management on progress of all projects
- Project reviews and gate approvals
- Escalation of issues that projects will inevitably encounter

Endpoint

A wealth of PM knowledge and techniques is available – something to fit nearly every situation. Although it is a great resource for experienced project managers and teams, the sheer quantity of best practices scares away many low-maturity organizations that would like to reap the benefits of better project management. These newcomers should start with a lightweight backpacker’s approach to project management – a “barely sufficient” project framework, toolkit, and governance.

Further Information

An example flowchart and tools are on the Resources tab at www.spspro.com. Some of the ideas in this article first appeared in a more detailed paper that I wrote for the 2009 Global Congress of the Project Management Institute. You can read that paper at http://www.spspro.com/SPS_cases_papers.htm

About the Author

Jeff Oltmann is principal consultant at Synergy Professional Services, LLC in Portland, Oregon (www.spspro.com). He is also on the graduate faculty of the Division of Management at Oregon Health and Science University. Jeff welcomes your questions and ideas. You can contact him at jeff@spspro.com or read previous articles at www.spspro.com/resources.htm.