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## Resource List

These books, articles, and websites have good material. Let us know what you think about them. If you'd like to contribute a review, contact us. (We periodically update this list on [www.spspro.com](http://www.spspro.com).)

### **Books and Articles**

#### **PROJECT MANAGEMENT**

Verzuh, Eric: *Fast Forward MBA in Project Management*, 2nd ed (2005)

Verzuh looks at the challenges of today's project environment and examines the skills a project leader needs to make a project successful. He covers organizational changes, project management tools and techniques, control methods, and real life applications. This book is a good medium-depth overview of all aspects of project management. It is easy to read, with examples and short case studies, but meaty enough that both new and experienced project managers will find nuggets. Down to earth. The new chapter 13 in the second edition is about enterprise project management, and addresses programs, portfolios, and PMO's and well as projects.

Frame, J. Davidson: *The New Project Management*, 2nd ed (2002)

Frame makes a case that conventional project management wisdom is only marginally relevant to project leaders working in today's turbulent project environments. He offers strategies and techniques for dealing with the soft and complex issues that affect most modern projects. Good ideas, especially on soft skills and orientation toward the customer. Frame sometimes undervalues the "traditional" techniques and gets too enthusiastic about how empowered a project leader can be. Pair this book with a solid grounding in the "hard" fundamentals of project management, such as Verzuh's book (above).

Milosevic, Dragan: *Project Management Toolbox* (2003) ISBN 0-471-20822-1

This is a comprehensive compilation of project management techniques that solve specific problems. It includes full explanations of how and when to use each one, along with references for further reading. This is not a standalone reference about project management. Think of it as a reference manual for over one hundred tools covering all aspects of projects. It also contains information on how to construct a custom toolbox that meets the specific needs of your organization.

Kerzner, Harold: *Strategic Planning for Project Management Using a Project Management Maturity Model* (Wiley 2001)

In this expensive book, Kerzner explains a five level model for assessing project management maturity. He also covers the characteristics of each level, the roadblocks to getting from level to the next, and where you should focus your energy. There are many project management maturity models (over 20 the last time I counted), but Kerzner's is reasonable, broadly applicable, and non-proprietary. Synergy uses some of his definitions to frame assessment consulting. Buy this book only if you are professionally interested in maturity models.

Kerzner, Harold, *Strategic Planning for a Project Office*, Project Management Journal (PMJ), V34, No 2, June 2003, p. 13 - 25

This article is a recent overview of the history and current practices of PMO's. Kerzner is well known for his project management writings. It is a good place to start learning about the variety of PMO implementations today.

Pinto, Jeffrey K. and Om P Kharbanda, *How to Fail in Project Management (without really trying)*, Business Horizons, 1996, HBS Publishing

The authors examine several project disasters, and give a list of an even dozen sure-fire methods to ruin a project's chances of success. Humorous and thought provoking at the same time.

Matta, Nadim F. and Ronald N. Ashkenas, *Why Good Projects Fail Anyway*, HBR Onpoint Product 4872

“Big projects fail at an astonishing rate,” say the authors. Sad, but true. This article proposes that traditional project management techniques do a good job at reducing execution risk, but miss the “white space risk” and the “integration risk” that haunt large, complex, rapidly changing projects. The authors propose using rapid response teams to address this gap, and give a case study of how this approach made a big difference on a large, aggressive World Bank project.

Gary, Loren, *Dealing with the “Fuzzy Front End”*, HBSP Article Reprint No. U0306C

How do you manage the crucial beginnings of a project, when so much is uncertain? This short article gives some down to earth tips, and it contains a wonderful quote: “Remember your ‘sacred responsibility to disappoint.’”

Oltmann, Jeff, *Mastering Projects series*, [www.spspro.com/SPS\\_cases\\_papers.htm](http://www.spspro.com/SPS_cases_papers.htm)

This is a series of short articles from a column that Jeff Oltmann writes for PMI, *Project Management World Today*, and other publications. The articles contain tips and insights on various aspects of making projects more successful.

## PROGRAM MANAGEMENT

Project Management Institute: *The Standard for Program Management* (2006) ISBN 978-1-930699-54-0

This standard from PMI has a split personality. The first part, called the framework, outlines how project, program, and portfolio management are different, what a program management lifecycle looks like, and why benefits realization is an important focus of programs. The second part, called the standard, lists program management processes in typical process-driven style and borrows heavily from *The Standard for Project Management*.

Milosevic, Dragan, Russ Martinelli, and James Waddell: *Program Management for Improved Business Results* (2007) ISBN 978-0-471-78354-1

This book is a generally good overview of program management, emphasizing its role as a delivery vehicle for whole products that create business value. It covers organizational issues; defining, planning, and executing a program; program metrics and tools; and what it takes to be a program manager. It is much more focused on practical application than the PMI standard. The point of view is primarily of building organizational capability for repeatedly doing successful programs. Martinelli and Waddell have many years of experience in program-driven technology organizations, while Milosevic is a well-respected academic, so the book is a balance of concepts and applications. Includes case studies.

Brown, James: *The Handbook of Program Management* (2008) ISBN 978-0-07-149472-4

This small book covers many topics that are important to program managers, such as stakeholders, process vs. agility, execution, teams, communication, and risk. The author is formerly from NASA, and has written the book as a common-sense set of tips and techniques gathered from his personal experience. This book focuses more on the program manager’s point of view and is a nice complement to *Program Management for Improved Business Results*.

## PORTFOLIO MANAGEMENT AND PRODUCT DEVELOPMENT

Wheelwright, Steven and Kim Clark: *Revolutionizing Product Development: Quantum Leaps in Speed, Efficiency, and Quality* (1992) ISBN 0-02-905515-6

Revolutionizing Product Development is a classic for new product development. It covers a broad range of product development topics, including project portfolio management (chapter 5) and platform management from a product development perspective. From development frameworks to project plans to building capability, get a copy of this for your bookshelf.

Cooper, Robert, Scott Edgett, Elko Kleinschmidt: *Portfolio Management for New Products*, 2nd edition, ISBN 0-7382-0514-1

This is standard source for portfolio management techniques and best practices. It focuses heavily on new product development, but the concepts are applicable to other areas. It also discusses ways to tie portfolio management to phase gates.

Levine, Harvey A.: *Project Portfolio Management: A Practical Guide to Selecting Projects, Managing Portfolios, and Maximizing Benefits*, Jossey-Bass Business & Management, ISBN 978-0787977542

Submitted by a Synergy client, who says that it is a collection of essays and articles that are fairly digestible! (Large book)

Dye, Lowell D. and James S. Pennypacker: *Project Portfolio Management: Selecting and Prioritizing Projects for Competitive Advantage*, ISBN 1-929576-00-5

A 400 page collection of different points of view and experiences with project portfolio management. Best price seems to be directly from the publisher at [www.cbponline.com](http://www.cbponline.com).

Project Management Institute: *The Standard for Portfolio Management*, ISBN 1-930699-90-5-00-5

This is an attempt to codify the processes of project portfolio management, similar to what the PMBOK is for project management. It is about 75 pages, and is best as a reference, not as an overview.

Kaplan, Robert S, and David P. Norton: *The Balanced Scorecard*, ISBN 0-87584-651-3

This important book introduces the use of balanced scorecards both as a measurement system and as a management system. The management system provides a way to define interlocking initiatives that coordinate the organization's knowledge, abilities, and effort to achieve long-term strategic goals. Fits well with portfolio management ideas, since portfolio management requires a clear statement of business objectives.

Maccormack, Alan and Sandra J. Sucher, *Le Petit Chef*, HBS #9-602-080

Le Petit Chef is a Harvard Business School case study on project planning in the R&D department of an appliance manufacturer. LPC is in trouble, partly because it does not have a disciplined method for creating a development roadmap that lines up with its strategy and its capabilities. This case is good for starting discussions on the connections between strategy, R&D and project selection.

Oltmann, Jeff, *Project Portfolio Management: The Art of Saying No*

This short paper gives an executive level overview of the purpose and process of portfolio management. [http://www.spspro.com/SPS\\_cases\\_papers.htm](http://www.spspro.com/SPS_cases_papers.htm).

Oltmann, Jeff, *Project Portfolio Management: How to Do the Right Projects at the Right Time (Proceedings of the 2008 PMI Global Congress)*

This 8-page paper summarizes each of the major steps in the portfolio management process. [http://www.spspro.com/SPS\\_cases\\_papers.htm](http://www.spspro.com/SPS_cases_papers.htm)

## HEALTHCARE MANAGEMENT

Meliones, Jon, *Saving Money, Saving Lives*, HBR November-December 2000, Reprint No. R00612

Dr. Meliones and his team used a Balanced Scorecard approach at Duke Children's Hospital to improve customer satisfaction ratings by 18%, reduce average length of stay by almost 25%, and reduce costs by \$29M without staff cutbacks. It transformed a money-losing unit in one that is profitable and better able to achieve its mission.

Adler, Paul S., Patricia Riley, Seak-Woo Kwon, Ben Lee, and Ram Satrasala, *Performance Improvement Capability—Keys to Accelerating Performance Improvement in Hospitals*, University of California, Berkeley, California Management Review CMR246 2003 (can be obtained from HBSP)

The authors observe that improvement programs in healthcare organizations have often not met expectations, despite much effort and money. They analyzed the attempts of several children's hospitals to accelerate their rate of performance improvement, leading to an assessment framework of five key components that shape an organization's ability to successfully innovate and make performance improvements.

Kaufman, Darren S., *Using Project Management Methodology to Plan and Track Inpatient Care*, Journal on Quality and Patient Safety, Volume 31 Number 8, August 2005, p. 463 – 468

Dr. Kaufman applies project management's classic Work Breakdown Structure (WBS) and Gantt charting techniques to manage patient care in a clinical setting. Who would have thought that such analytical techniques would fit with high touch patient care?

## PEOPLE, TEAMS, AND CHANGE

Duarte, Deborah L. and Nancy Tennant Snyder: *Mastering Virtual Teams* (2001) ISBN 0—7879-5589-2

Today's virtual teams cross countries, cultures, or just different parts of a large organization. The dust jacket of this book aptly describes it as a "nuts-and-bolts guide to virtual teams." It is a very practical handbook on how to create and manage a virtual team, with many tools and checklists.

Frederick Herzberg, *One More Time-How Do You Motivate Employees*, HBR Classic, September-October 1987

"Forget praise. Forget punishment. Forget cash. You need to make their jobs more interesting." Herzberg's pioneering research indicated that the things that motivate employees on the job are fundamentally different from the things that make them dissatisfied. He debunks common myths about what motivates employees, shows how job enrichment is a top motivator, gives steps on how to enrich jobs effectively, and measures the results. If you have to motivate other people, whether or not you have direct authority, this will make you think.

Katzenbach, Jon R. and Douglas K. Smith, *The Discipline of Teams*, HBR 1993, Reprint 93207

Katzenbach and Smith examine the differences between teams that perform and those that do not. They summarize eight approaches to building team performance shared by many of the successful teams they observed.

Kotter, John P., *Leading Change: Why Transformation Efforts Fail*, HBR Mar – Apr 1995, Reprint 95204

Kotter lists eight common errors that organizations make when they try to remake themselves. If you've ever tried to make major changes stick, you'll wince as you recognize that you've committed many of the same errors, despite your best intentions. Kotter then summarizes an eight-step process for successful transformation. This article kicked off his well-known books on the subject. This is a great reminder checklist for you to keep handy as you try to shepherd a new process or other organizational change.

## ***Informational Websites***

Expert Project Management

[www.maxwideman.com](http://www.maxwideman.com)

This well respected website is a treasure trove of thousands of tips, best practices and templates for many different project management tasks.

IT Project Management for Project Managers

[www.ganttthead.com](http://www.ganttthead.com)

This online community features news, forums, tips, and articles. Its focus is IT projects, but much of the information is generally useful.

Computerworld ROI Resource Center

[www.computerworld.com](http://www.computerworld.com)

Short articles and tutorials on how to compute return on investment for project proposals.

CIO Magazine Online

[www.cio.com](http://www.cio.com)

Frequent articles and archives on valuation of projects.

Agile Methods

A Manifesto for Agile Software Development: <http://agilemanifesto.org/>

## ***Classes and Conferences***

Project Portfolio Management: Aligning Projects and Strategy

OGI School of Science and Engineering, [www.cpd.ogi.edu](http://www.cpd.ogi.edu) or [www.spspro.com](http://www.spspro.com)

Managing Programs and Multiple Projects

Various public and private venues, [www.spspro.com](http://www.spspro.com)

Foundations and Best Practices in Project Management

OGI School of Science and Engineering, [www.cpd.ogi.edu](http://www.cpd.ogi.edu) or [www.spspro.com](http://www.spspro.com)

Project Management Certificate Program

Portland State University, <http://www.pdc.pdx.edu/projman/>

Managing Projects and Programs conference

Portland State University, [http://www.pdc.pdx.edu/proj\\_conf/](http://www.pdc.pdx.edu/proj_conf/)

This conference, held every July, is a great way to meet, learn, and share with your colleagues.

## Groups and Organizations

### Pacific Northwest Portfolio Management Roundtable

[www.spspro.com/pfm\\_rt.htm](http://www.spspro.com/pfm_rt.htm)

The Portfolio Management Roundtable is a group of practitioners who share common problems and solutions in project portfolio management (often called IT governance in the IT area.) These people either are currently implementing portfolio management techniques in their organization or are seriously investigating them. Current members are from product development, IT, non-profit, and service organizations.

### Portland Chapter of the Project Management Institute

[www.pmi-portland.org](http://www.pmi-portland.org)

The Portland chapter is one of the largest chapters of this international professional association for project management.

### Program Management Forum

[www.programmanagementforum.org](http://www.programmanagementforum.org)

The Program Management Forum is a regional learning and support community for program managers and those interested in program management. PMF convenes a series of interactive educational events that feature best practices, new methodologies and practical tools and tips. PMF defines a program as a set of coordinated projects that together deliver new products or systems.

### Portland Chapter of the Product Development and Management Association

[www.oregonpdma.org](http://www.oregonpdma.org)

PDMA is an international association of professionals focused on product development, innovation, and marketing.

## Other Resources

### Microsoft Project books recommended by local experts:

Tim Runcie, Advisicon recommends:

- *Dynamic Scheduling with Microsoft Project* by Eric Uutewaal
- *Project Inside Out* by Microsoft Press

Jo Shires, CSC recommends:

- *Show Me Microsoft Project 2003* by Brian Kennemer (for beginning - intermediate level self-learners).
- *Microsoft Office Project Step by Step* by Carl Chatfield
- *Microsoft Office Project Inside Out* by Teresa Stover (door-stop reference book for Project 2003)
- *Complete Idiot's Guide to Project Management with Microsoft Project 2003* by Ron Black (puts MS Project into a project management context)