

Blind Spots: See What You Can't See for Effective Project Management

In today's business world, projects are often run by inexperienced project managers (PMs) who are promoted to their PM positions because they are subject matter experts. Hence the term "accidental project manager." These PMs are often well-intentioned, but their PM skills and experience are quite frequently limited to using Microsoft Project. Their lack of PM education and training may result in them developing "blind spots" that make them less effective than their PM-trained peers. They are unaware of certain time-honored techniques that would help them manage projects more effectively. This article will identify some of the most common blind spots and suggest ways to achieve more effective project management.

Scope control

Arguably the most important knowledge area in project management is scope. The PMBOK defines scope as "the sum of the products, services, and results to be provided as a project."¹ While the PM may understand this, what he doesn't always understand is that it is his job to both help define the scope and protect it. That is, he must ensure that the scope does not change or, if it does, that the change is managed so it doesn't negatively impact the project's objectives. The project deliverables must consist of only those deliverables necessary to complete the project. How the PM determines what is in scope and – just as importantly – out of scope is our next topic.

Joint planning sessions

Too often, a new or junior PM believes that it is not only his responsibility to produce the scope; he believes it is solely his responsibility. Nothing could be further from the truth. In fact, it is a joint effort taken on by the team's stakeholders. The best way to produce the necessary planning documentation is by conducting a joint planning session. This is accomplished by getting the project's primary stakeholders together in a room, for at least two days, to gain consensus regarding what the scope of the project is (and is not). This session is typically led by a trained facilitator who can not only assist in documenting project issues, but can also resolve conflict as it arises.

At the very least, these planning sessions should produce a planning document that includes in-scope and out of scope statements, a Work Breakdown Structure (WBS), and an initial risk register. The WBS is a vital part of the scope baseline and is, per PMBOK, "a deliverable-oriented hierarchical decomposition of the work to be executed by the project team to accomplish the project objectives and create the required deliverables. It organizes and defines the total scope of the project."² Together with the scope statement, the WBS becomes the foundation of the scope baseline and it is against that baseline that the PM can manage scope.

¹ Project Management Institute, *Project Management Body of Knowledge*, Third Edition, p. 375

² Ibid, p. 112

If the PM is wise enough to hold these joint planning sessions, he will find that the potential pain of having to adjudicate them is far outweighed by the pleasure of having team buy-in. A PM sitting alone in his office creating the scope baseline independently does happen, but is ill-advised unless the team cannot get together.

Stakeholder management

Previously, we suggested that stakeholders get together to plan the project. What is a stakeholder anyway? Per PMI, a stakeholder is a “person or organization such as customers, sponsors, performing organizations and the public, that are actively involved in the project, or whose interests may be positively or negatively affected by execution or completion of the project.”³ In other words, stakeholders are very important people (including team members) whose interest in the project requires notification of any major issues. As mentioned above, they should be involved as much as possible in up-front scope planning, but should also be apprised of changes, risks, and any other project-threatening issues.

It is also important that the project manager perform a stakeholder analysis. The purpose of this analysis is to better understand each stakeholder and his/her interest and investment in the project. For example, are they friendly or adversarial? Believe it or not, some stakeholders are actively hostile to a project and will do whatever they can to sabotage it. There are numerous project case histories that include major stakeholders who were adversarial. One of the most famous (or infamous) is the Denver International Airport. The airlines were so opposed to this airport that they did everything they could to prevent it from coming online. Eventually, the project was completed, but not without taking a great toll on everyone involved.⁴

Change management

We mentioned earlier that scope is one of the most important aspects of the project and arguably the most likely to change. This is because various stakeholders within (and outside of) the organization attempt to change the previously agreed upon scope. The result of this is scope creep and the PMI definition is instructive: “adding features and functionality without addressing the effects on time, costs, and resources or without customer approval.”⁵

The issue is not that the scope should never change. The issue is that should change be called for, that it be handled in the most efficient way possible, so it does not disrupt the project’s flow. Therefore, each project should have a change control board that is responsible for ensuring that all changes are reviewed with a goal of preserving the project’s objectives. After reviewing the proposed change, the PM can issue a new schedule with new cost estimates and staffing requirements. If they exceed the

³ Ibid., p. 376

⁴ *Project Management Case Studies*, Harold Kerzner, p. 517, John Wiley & Sons. Inc.

⁵ Project Management Body of Knowledge, Third Edition, p. 375

stakeholders' wishes, no harm done. The project proceeds. If the changes are approved, the project can make those changes in direction intelligently.

Resource availability

When a schedule is first generated, it is created assuming almost unlimited resources. That is, we develop the schedule by first looking at what needs to be done and by when. Then, we look at what resources are actually available. The blind spot in many projects is that team members (and often management) do not accurately assess the availability of key resources. When is a senior engineer available? When is a junior consultant sufficient? How many different projects is a particular resource working on? Studies show that the more projects a team member works on, the less efficient he becomes. The key is to know what resources you need, when you need them, and what skill level they must have. Also, what other commitments have team members made? Are they already working on two or three other projects? The PM needs to know all of this because the heart and soul of his project is resources, both human and non-human (e.g., equipment).

Managing the team

Speaking of resources, who's managing the team? Well, if you're the project manager, you are. You may not be totally in charge of their futures. It may be that you're working in a matrix environment and a resource is loaned to you by a functional manager. That's fine, but even though the resource works for someone else, you are still responsible for managing that resource while he or she is on your project. More to the point, you are responsible for managing the entire team. That means handling conflict resolution, rewards and recognition, assigning work and just generally being aware of any issues that might arise on the team. Bottom line: regardless for whom the resource works, he is your day-to-day responsibility while he is on your project.

Estimating

At this point, you have a schedule and the schedule has people assigned to do various activities. But how long do those activities take? And who decides how long each activity should take? Do you guess? Is there some database of activities' durations you can access? Perhaps a little of each. But, the best estimate of how long an activity should take is derived from the team member who will do it. He or she should estimate the activity duration. The problem is that accurate estimating is as much an art as a science. Estimating is – for want of a better expression – an educated guess as to how long something will take to complete. Often, team members don't really want to spend the time it takes to correctly estimate. So, they just guess the first number that comes into their head. I have attended numerous planning sessions and it's remarkable how many activities take exactly 10 days - at least in theory. So, know that your schedule is only as good as the estimates and the estimates are only as good as the amount of time spent on them.

Critical path maintenance

Often a project manager, having created the schedule, will try to use the schedule to manage the project. This is as it should be. However, as often as not, the PM will not pay attention to the most vital part of the schedule, the critical path. The critical path (CP) is that path which is the longest throughout the network. A one-day slip on the CP is a one-day slip to the entire project. The PM should review the status of the project's CP on a day-to-day basis. Are the CP items on time? Are they slipping? Can we add resources to the CP and bring the date in sooner (known as "crashing")? Diligent attention to the critical path will reward the attentive project manager.

Monitor and control

What happens once the project proceeds beyond the initiation stage into the execution stage? All the project tasks are being done and the budget is being expended. At this point, how do we know if the project is on track? Well, we can ask the team members how they are doing. We can ask them how "done" they are. As often as not, they will tell you they are "50% done" or "90% done." What does that mean not only to them, but to you and your project? What exactly will you report to management? It is important to monitor and control the project as it progresses to know what you've accomplished, how much you spent, and how much you planned to accomplish. There is a system called Earned Value which does exactly that. It is used faithfully in the US government and by government contractors. It precisely measures what needs to be done and how much more labor and money the project requires to accomplish its ends. Outside of those agencies, we find that not nearly enough measurement is performed and so no one really knows how "done" the project is. At the very least, you should be tracking key milestones to make sure that work is getting accomplished at the correct pace.

Risk Management

If you put aside all the other blind spots, we would argue that not attending to risk is one of the biggest mistakes that any novice or otherwise project manager can make. By the very nature of the fact that the project is temporary and unique, risk is inherent in any project. Risk must be identified and qualified. That is, you must identify each and every risk and then decide which ones are most important to counter against. Once you've done that, it's important to come up with mitigation strategies for each risk. What will you do once the risk arises? It is best to know what you will do well before the risk happens, not when it happens. Failing to effectively manage risk is one of the major blind spots that results in significant project failure. It should also be noted that looking only for negative risks (threats) is not to be the sole consideration when managing risk. One should also identify potential opportunities and attempt to exploit them.