

INTRODUCTION: How to Develop Project Management Procedures and Skills

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What This Is

A step-by-step guideline for how to develop and introduce project management practices to an organization. Provides a sequence for implementing critical new project management procedures quickly and effectively, and creating an environment that kick-starts and supports ongoing project management skills development.

Why It's Useful

Companies implement project management procedures and develop related skills in their personnel in order to improve project performance and thereby achieve critical business objectives. An important goal is to do so in such a way that the organization gets value from its project management processes as quickly as possible while also laying a foundation for long-term consistent project performance.

How to Use It

1. Read this guideline to understand how you can introduce key PM techniques quickly for new projects or projects already in progress.
2. Identify projects which should receive immediate attention using those techniques.
3. Consider also how you'll document the elements that should become part of your organization's project management procedures.
4. Also consider the state of skills and experience among your current project management staff (whether titled, dedicated project managers, or other staff such as technical team members that you are pressing into duty as *de facto* project managers).
5. Identify approaches you should use to develop their skills and PM knowledge.
6. Finally, plan your project management procedure and skills development as a project. Set a timeline with specific goals for implementing the techniques in this guideline.

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Introduction

Companies implement project management procedures and develop related skills in their personnel in order to improve project performance and thereby achieve critical business objectives. The goal is to do so in such a way that the organization gets value from its project management processes as quickly as possible while also laying a foundation for long-term consistent project performance. Typical challenges with reaching that goal include:

- **Developing and deploying the new procedures such that they are truly value-added and appropriate for your organization.** If your teams see the new processes as bureaucratic paperwork or micro-management, chances are you won't see the full benefit that effective project management can bring. They must see project management procedures as practical tools that solve project problems and prevent project failures.
- **Getting new procedures created and into use quickly and effectively to benefit current projects,** rather than having to wait for a long improvement initiative to be executed. Every best practice new procedure does not have to be deployed for you to start achieving significant project benefits.
- **Spreading the new approaches to multiple projects quickly and developing project management skills widely, even among inexperienced project managers,** to create a foundation for long-term consistent project performance. Many organizations manage to improve PM in one area but can't replicate it widely, falling well short of the overall business performance they need to achieve.

These challenges can be surmounted with the right pragmatic approach. This article, originally written for and published on AskHow2.com, provides a sequence for implementing critical new project management procedures quickly and effectively, and creating an environment that kick-starts and supports ongoing project management skills development.

The Steps

1. Identify the management champion

Implementing new project management processes and techniques requires changes to how teams work and ultimately changes to individuals' behavior. People at all levels will need to see active, visible management support for these changes and their urgency. The role of the management champion includes articulating the reasons behind the new project management procedures and skill development, and removing obstacles to their achievement.

The champion's role may require that they tackle changes in other fundamental management processes in the company - for instance, the reward structure. Compensation and career paths may need changes to include project team results rather than just functional group performance. Executives have to ensure that the company's performance appraisal and review structure rewards individuals for participating on project teams, using the new procedures, developing their own PM skills, and meeting project goals.

Going forward, the management champion must support the project teams' efforts personally and through their influence with other executives. They must use the terms, help establish the procedures in the company's culture, and continue to communicate the value executive management sees in them. They will also support the importance of the project manager role, making sure that skills development opportunities are available and that project managers are selected judiciously. They will affirm the project managers' authority as they employ the new procedures on their projects.

Select a management champion and announce the role and its purpose to other management and to project managers and their teams.

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The Steps

2. Determine the best focus for initial PM procedures

Every possible useful PM procedure can't be and shouldn't be implemented simultaneously! The goal of this step is to start with areas of past project problems and pain. Aim your first procedures at the areas that will have a significant positive impact on current projects. You'll not only improve those projects' chances of success, you'll also demonstrate PM value and enable faster buy-in to changing "how we do things."

For example, a typical project killer is scope creep - the feature list for a product or system grows and grows, increasing the project work and risk and threatening schedule and costs. Scope creep is a leading cause of project failure. If scope creep typically threatens a company's projects, initial efforts should focus on implementing Project Vision or Charter statements and change control processes.

To determine the best areas of initial focus:

- a. **Do private interviews of key managers and team members to get their perspective.** What elements of projects are not working and where are the biggest opportunity for improvement? To obtain best results, have an objective, trusted person perform the interviews. The individuals must feel they can be open and honest about the current state of affairs.
- b. **For one or more recent projects, hold a lessons learned meeting** with the project team to identify past issues and reflect on their impact.

Lessons learned meetings are generally 2 to 4-hour meetings, facilitated by an objective project "outsider." All cross-functional groups are represented by at least one person who participated on the project team. The atmosphere is established as "no blame, no finger-pointing." The group reviews the project's performance to schedule, resource, cost, and feature goals to understand where and how far the project got off track. Using flipchart paper, the team then brainstorms things that went well and worked well on the project, and things that didn't.

The team formulates lessons learned and recommendations for each of the project issues, and identifies the top impacts to project goals and the corresponding top recommendations for future projects.

- c. **Analyze the results and decide focus of initial PM procedures and skill development.**

Those top recommendations point to the highest-leverage areas for your initial PM procedures and skills development. They also provide detail for what your new procedures should contain and what type of skills development your team members will need. For example, consider a product development company that performed a lessons learned meeting on a past major platform development project. The group of executives and project team members together identified their test planning practices as a critical area that caused a 4-month slip in the project schedule. The product wasn't tested thoroughly enough early enough to avoid late discovery of problems, which in turn caused massive rework. This led them to develop a PM procedure for what types of testing must be included in their project schedules, a template for the sections their test plans should contain, and a project standard for the testing reviews that must be held. They also determined what related training would be needed for certain team members to accomplish this new level of testing.

Note that the analysis of highest-impact lessons learned results also helps build team and management buy-in for new procedures. The magnitude of those top items' impact on the project makes clear the importance of avoiding these problems on future projects.

See the ProjectConnections.com templates for [Lessons Learned Survey](#) and [Lessons Learned Meeting and Report](#).

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3. Create first versions of the new PM procedures

Next, decide how you'll create new project management procedures quickly to address your top "lessons learned" issues. Options include leveraging best practices from other parts of your company; using outside consultants to bring best practices in; downloading and customizing processes and templates from PM web sites; having your staff collaboratively define the new practices; or a combination of these sources.

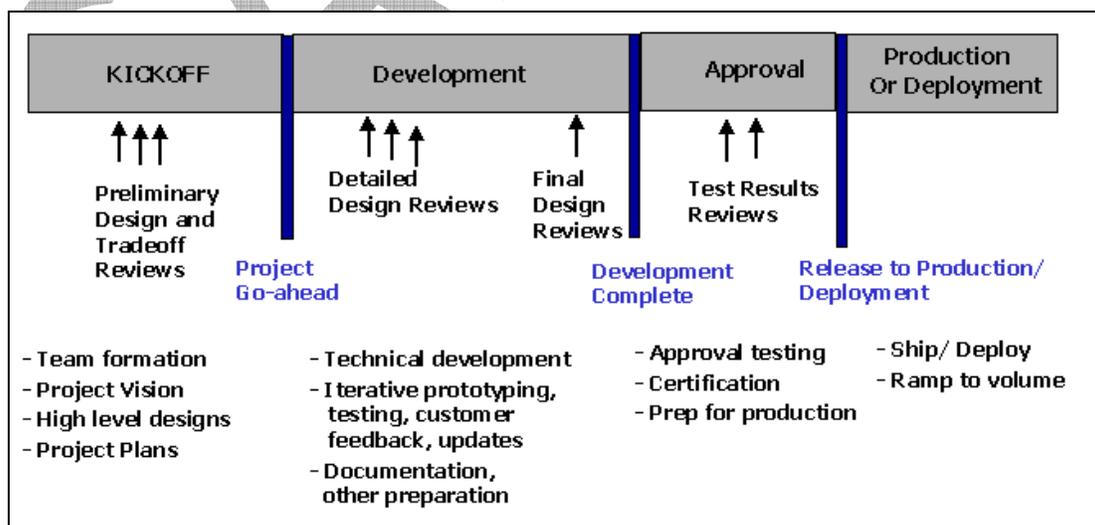
Consider creating not only individual procedures or deliverables templates, but also a simple "framework" document that summarizes your organization's PM approach. It should capture:

- What project phases you will follow- that is, how your projects will be divided into major activity blocks such as Kickoff, Development, Approval, and Deployment. See an example of a process framework in the diagram below.
- What reviews should happen during each phase of the project, including their timing and purpose and who should attend.
- The specific new processes you're introducing within the framework, with appropriate step-by-step instructions, detailed guidelines, and related document outlines.

The goal of this first process documentation is NOT to create a big binder of every possible PM activity. The goal is to quickly provide an overview of your new PM approach, with basic orientation to key new processes, deliverables, etc. It should make it easy for a team to understand and use the new PM techniques. A first fast draft is all that is needed to get going- it can be used and refined in step 4 to help get the new procedures into use on a project immediately.

See the diagram on the next page for an example of a framework.

See the ProjectConnections.com template [Development Process Quick Reference](#) for one example of a practical format.



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The Steps

4. Kick off a "pilot" project, using the new procedures

The goal of this step is to get those new critical procedures into play immediately on an important project. One highly effective way to do this is via a kickoff meeting, which is a multi-hour facilitated session attended by the cross-functional core project team and key project stakeholders.

The main purpose of a kickoff meeting early in a project is to get the team together early and get going in a focused manner. The team gets aligned on project goals, establishes team roles, discusses schedule goals and resource constraints, and sets actions for finishing the first phase of the project.

When new PM procedures are being introduced, the kickoff meeting also includes time to introduce them to the team just-in-time and explain the reason for adopting them. Then the new procedures can get used to accomplish actual project work in the kickoff meeting. Hands on education and application happen together.

The just-in-time "training" portion should cover the organization's PM framework and any new procedures. If the framework itself is new, show diagrams of it and describe the phases and key components. List the new procedures and review details of any that will be used during this kickoff meeting. Explain the pragmatic rationale for both the framework and the procedures. This portion of the meeting helps get everyone on board mentally, understanding any new terminology, bought in to the idea that the new approaches will be valuable, and ready to apply one or more new techniques in the meeting.

The actual "project work" part of the kickoff meeting includes time to collaboratively generate draft project deliverables and use the new procedures you've decided to focus on initially. For instance, in our earlier testing example, the team's kickoff meeting included a timeslot to use the new guideline for project testing and brainstorm the types of testing this project would require. A team with new procedures to properly select and then control project scope would spend kickoff time creating a Project Charter document, and

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