TEN STEPS TO CREATE A PROJECT MANAGEMENT METHODOLOGY

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A Supplement to the Book

Project Management for Flat Organizations:

Cost Effective Steps to Achieving Successful Results

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PROJECT MANAGEMENT METHODOLOGY

You work for an organization that has decided there are enough projects to warrant standardizing on a project management approach or what many people refer to as a Project Management Methodology (PMM). Your organization realizes that a standardized methodology provides consistency with project-related terminology and following the methodology will assist with improving the likelihood of the project being successful. PMM includes suggestions, guidelines, and templates—project aids for the project manager, sponsor, and team members. This whitepaper walks through the steps for creating a PMM and augments information found in the book, *Project Management for Flat Organizations.*

THE PHILOSOPHY

An organization accustomed to informality and limited controls needs a PMM that is just as informal and does not impose massive controls. It should provide suggestions and guidelines, and if appropriate, required project processes and documents. *Suggestions* are ideas to consider while *guidelines* are recommendations that allow for informality and flexibility because they enable a project manager and team to use judgment and discretion. The project processes and documents are the selected procedures, methods, and documents that are *required* by management to provide minimal control, meet regulatory needs, or provide organizational standardization. The goal of the suggestions, guidelines, and required processes and documents is to provide the project manager and team members with aids that

- assist with efficiency and eliminate wasted time and resources;
- improve the chances that a quality product or service is delivered on time and within budget;
- provide for consistency across projects.

THE STEPS

STEP 1: "AUTHORIZE" A PROJECT

Creating a PMM for an organization is a project. As with any other project, it needs to be "authorized" by management and then have a sponsor and project manager assigned. Authorize just means someone in

management has given their "okay" to proceed. Because this project is the creation of a PMM, management might decide the sponsor and project manager should be the same person.

Occasionally, it makes sense to hire an experienced project manager instead of an internal person to assist with the creation of the methodology. This is particularly true if the staff have limited or no training in project management. Note the word *assist.* The experienced project manager is not there to create the methodology for the organization, but is there to coach and work with the project team. If the team needs project management training, the right coach can work with them to not only create the approach but also train the team in project management concepts and theory as the project progresses.

STEP 2: START THE PROJECT WITH A SCOPE STATEMENT AND A PROJECT PLAN

As with any project, one of the first activities is to create a scope statement (or project definition). The scope statement outlines points such as the project description, objective, and requirements. Creating a scope statement is discussed in Chapter 7 in *Project Management for Flat Organizations.* Although the final deliverable is the PMM, take the time to put some substance around the description, objective, and requirements such as

- the final deliverable will be a short ten to fifteen page document—a guideline for use on all projects;
- prior project plans—templates—will be included so that project managers and team members have historical documentation that can be referred to and used for planning purposes.

With a signed scope statement, create a project plan that outlines the work (scope), time (schedule), and cost (budget). Creating a project plan is discussed in Chapters 8 to 13 in *Project Management for Flat Organizations.*

STEP 3: CREATE A PROJECT TEAM

The best PMM suggestions and guidelines are created when the staff who are responsible for managing or working on projects are included in the PMM's creation. The staff are the project managers and team members who will be the key users of the methodology and will use it to plan, manage, and work on the projects. By taking an active role in the development process, the staff, now the project team, are able to provide input and build consensus with one another as to the best approach for the organization. They have a vested interest in the success of not only the project but also the methodology. Developing a

PMM without input of the key users can cause a methodology to be written that is not realistic for the organization and does not fit the culture. The result is a PMM that is ignored.

STEP 4: EXPLAIN THE REASON AND PURPOSE FOR AN ORGANIZATIONAL PMM

The successful implementation a PMM requires cultural change. Change is difficult and can be painful. People need to be comfortable and understand the reasons for the change because if they do not, the change tends to be unsuccessful. It is management's responsibility, or the sponsor's responsibility if he/she is the spokesperson for management, to explain the reasons for and benefits of a PMM to the organization. Make no mistake, no matter how informal or unstructured the PMM is, there will be change to the culture and people within the organization.

STEP 5: BRAINSTORM

Start the creation process with a brainstorming session. Review prior projects and walk through each of the project management processes: initiating, planning, execution, monitoring and controlling, and closing. Discuss what worked on each project; what did not work on each project; and what could have been improved on each project. Review the tools, techniques, and templates that were used. As the team works through this process, keep in mind that what works for one organization does not necessarily work for another. This does not mean that if a member of the team suggests following a slightly different process or used a different template—a process or template that he/she used at a different organization— the process or template should be ignored. Be innovative and open to change. You might find that the different process or template is a better fit than what is currently being used. Consider all ideas and evaluate all suggestions and recommendations. Try to focus on why something worked and the best way to duplicate the success because these are the ultimate goals of a PMM.

STEP 6: CREATE PMM DOCUMENTATION

After the brainstorming, start creating the PMM document. For many flat organizations accustomed to limited controls and informal communications, management might decide a brief simple document is adequate as long as it includes the following sections:

- a bulleted list of suggestions and guidelines by project management process (initiating, planning, execution, monitoring and controlling, and closing)
- chart of suggested tools, techniques and templates

- project plan—templates—from prior projects
- glossary of key project management terms

A simple brief document tends to provide the project manager and team members with more flexibility, and the ability to be more innovative than a detailed manual. Some flat organizations might determine they need a more detailed manual that includes additional sections such as requirements for each project management process or flowcharts dictating control processes for issue management and change management.

Every organization's PMM is unique and depends on factors such as the organization's culture and types and size of projects. The goal is to balance informality with formality so that projects can be completed effectively and efficiently, but still provide the project manager the leeway and flexibility required to be successful. Remember: the more formality, the more control and more project overhead.

STEP 7: REVIEW THE METHODOLOGY WITH KEY PEOPLE AND ASK FOR FEEDBACK

With a methodology in hand, review the proposed PMM with key staff members and solicit feedback. Why? Any methodology that is designed and implemented needs to be owned and endorsed by management, but also accepted by the staff. Keep staff in the communication loop. Explain the next steps are to train the applicable staff in the PMM and then find a small project—a pilot—to test the approach.

STEP 8: TRAIN PEOPLE

Do not forget about training. While it is great to have a PMM, too often the methodology is created and placed on the shelf, only to be forgotten and ignored. One reason a methodology fails is no one has taken the time to explain the process to all those that are impacted by the change. Another reason a methodology can fail is the project managers and team members who were not involved in the creation of the methodology, but need to use the methodology, are not trained.

STEP 9: TEST THE METHODOLOGY AND MODIFY IT ACCORDINGLY

Test the methodology out on a small project—a pilot—that has a high probability of success. It should not be a hard, difficult or a politically charged project, but a project that is likely to succeed. The goal is to check the approach out and not discourage anyone in the process. Based on the lessons learned, modify the methodology accordingly. It is not unusual for a new PMM to have unexpected consequences that are positive as well as negative.

STEP 10: CLOSE THE PROJECT

When comfortable with the PMM, close the project. Remember a PMM is a living document that should and will change over time. For the first two or three projects that follow the methodology, consider creating two lessons learned documents—one for the project and one for the PMM. Change the PMM until the team is comfortable with the approach, suggestions, and guidelines. Things happens. No matter how much you think, "we got it right", a few minor changes can make the methodology even better.

Periodically members of the organization should meet to review the appropriateness of the PMM. Discuss what is working; what is not working; and what could be improved and then modify the PMM accordingly. What is meant by periodically varies by organization, but it could be after a certain number of projects, after the annual strategic plan which highlights the year's potential projects, after an acquisition of a business, or the introduction of a new line of business or program.

IN CONCLUSION

Creating a PMM is a project in itself. The final deliverable is an approach that assists the project manager, sponsor, and team members improve the likelihood for project success and provides consistency with and between all projects in an organization. Although the PMM will vary by organization, it includes suggestions, guidelines, and templates—aids—to help the team define, plan and then work the project plan**.**

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