Nine Fundamental Steps to Project Success

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Step 1: Conduct a project Discovery session

Step 6: Plan for Change

Step 7: Identify and manage risks and issues

Step 5: Execute the Plan

Step 8: Collect Lessons as you go

Step 9: Hone your communication

Step 2: Document all expectations & benefits

Step 4: Create the Plan

Step 3: Establish the "Ground Rules."
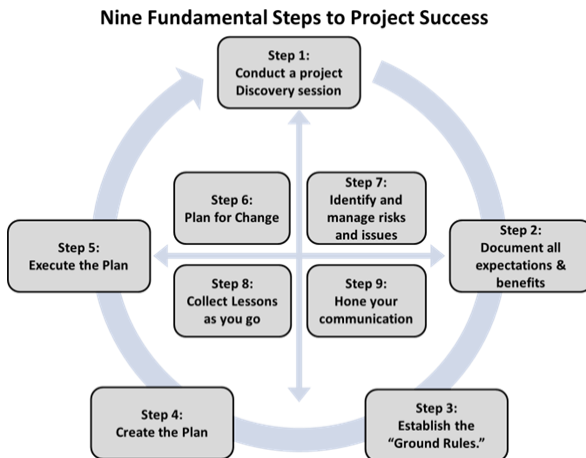
If you are an experienced project practitioner you may be asked at some point, "*What are the key things that a Project Manager should do in order to be successful?*" There is no one-line, simple answer to this question. Success depends on many factors, including the organization for which you work, the power granted or bestowed on the project manager, the responsibilities they are given on their project, and other influencing criteria. Having said that, we have found over the years that there do exist certain factors which, when done well, usually influence success. Let us elaborate.

First, we must establish your expectations as the reader. The nine steps we put forth in this article are not a "Holy Grail" for successfully managing a project. They represent actions which, if undertaken with purpose and meaning, can help set your project on the path to success, and keep it on that path. Think of the nine steps in this manner: if you are planning a road trip by car, there will be many steps to your plan (many of which you will do automatically); check that your vehicle is in good working order, ensure you have a map of the route, be certain that you have fuel, and so on. Some steps in this plan are more critical than others. This is the same principle we are applying to these "success factors" for project management. The nine steps are not in a sequence; whilst Step 1 will be undertaken before the others, the others may be undertaken in a different order.

Step 1: Conduct a project "Discovery session." Before a project formally exists, the idea for it will be discussed, reviewed and debated by people who have an idea to create something. The extent of these discussions will depend on the nature of the idea and the group promoting it. It may be as simple as one stakeholder generating the idea and that idea quickly becoming a project, or it may involve formal planning, with a Business Case, Estimates and detailed Benefits Management calculations using Return on Investment (RoI) or other factors being presented to a governing body for approval. Regardless of the breadth of processes to which the project is subjected at its inception, there are two critical aspects: (1) the realization of at least one person's expectations and (2) the knowledge that the project needs appropriate estimates (indicative or detailed), together

with assumptions made that will affect its outcome and perceived success. Will you be on board at this time as a PM? Maybe not. Whenever you are brought on board, one of the first things we believe to be important is to ensure that all these "Discovery" project artifacts and outcomes (however they are termed in your organization) are collected, documented, and accounted for within the deliverables of your project.

At the same time, make sure that you take the time to review the lessons from previous projects (both your own, and those of others). Once the lessons learned have been captured, apply those relevant to your project.

Step 2: Document all stakeholder expectations and benefits for the project. Not all stakeholders will be "for" the project; some will be against it. The way in which you collect and share everyone's expectations will depend on the size of your project and your organization's processes. In a previous article, we discussed Project Success Plans, which can be a way to capture all stakeholder needs and to define the meaning of success for everyone. Small projects may collect the expectations through personal interviews or by email. Larger projects, with stakeholders potentially numbering in the thousands, may employ sampling strategies and extensive consultation. Once collected, you may group the expectations and begin to find both complimentary and competing expectations.

It is vital to articulate an understanding of the core benefits of the projects implementation, and to ensure that it is threaded into the set-up and guiding principles of the project.

Understanding stakeholder expectations and key benefits will influence how the project will proceed, and will provide input into the Communication Plan. Having well-documented expectations and clearly defined benefits will pay dividends when project success metrics are being created and when key decisions must be made. At planned points in the project, expectations and benefits should be revalidated with the stakeholders, for example, at 25% completion, or at a planned project governance review. The revalidation is particularly important for projects of long duration and/or high complexity. Also, if key stakeholders change during the project, ensure that you check their expectations. The new stakeholder will have "inherited" the project, and may have different expectations than those of their predecessor.

Step 3: Establish the "Ground Rules." How will your project be managed? How and where will status reports and project artifacts be stored, and what will they look like? What is the team's appetite for risk? How often will you meet as a project team? Have you worked together before? These are just some of the questions to which your Ground Rules will provide answers. A Project Success Plan meeting (as discussed in a previous article) can help you to achieve this. The Ground Rules should document the governance and routines for the project as well as expectations for the project team. Once established, the Ground Rules and all key project components should be covered in a formal initiation meeting to certify that everyone is on the "same page."

Step 4: Create the Project Plan. The "Plan," in this sense, refers to the Project Management Plan (PMP), and subsidiary Plans, such as those for resources, risk management, communications. etc.. Involve your project team in accountability for the work in the creation of the PMP and subsidiary plans to ensure Owners of specific key activities are assigned and understood. It goes without saying that detailed work is required for estimates, budgets, schedules, quality and so forth.

Step 5: Execute the Project Plan. Once the plan is created and a baseline agreed upon, execute the plan. If the project has approved changes, these should have been integrated into a revision of

the plan (and, if necessary, a new baseline created) after approval. During the execution, measuring and controlling against the plan should be taking place. One would not drive the vehicle (in our earlier scenario) without checking fuel and other gauges and our progress along the route as we drive to our destination. The same analogy applies for your project.

Step 6: Work the Plan, but Plan for Change. Every project creates something unique. A Project Manager should expect changes, and should plan for change. Change can be healthy; it does not have to be negative. Look carefully at any changes requested to assess their fit with the project's objectives and the anticipated benefits. Embrace change requests as long as they are shown to add value, and track them against the agreed baseline. The way in which you handle requests for change can have a big impact on the eventual success you achieve.

Step 7: Identify and manage risks and issues. Your approach to risk will have a major bearing on your ability to cater to change. One of the things to do early in a project is understand the appetite for risk from the senior stakeholders. This sets the tone for how to approach risks and, if they occur, issues. A risk is an event that has the potential of impacting your project, either positively or negatively. An issue is something material that has occurred and must be handled. Each project will have unique risks (positive ones may be termed "opportunities"). Risks and issues should be recorded and strategies for them agreed upon and tracked. They should be actively and regularly discussed within the project team. Risks and issues logs from previous projects can provide useful pointers, and libraries of such information can serve as a good starting point for their identification. Done well, risks and issues management can aid a Project Manager enormously.

Step 8: Collect Lessons as you go. As we mentioned previously in our article "Learning Lessons – Before You Begin, as You Progress, and When You Have Finished," released in February 2011, we suggest past lessons be reviewed at the start of the project. Capturing lessons learned should not be a one-time task for a project. Ideally, lessons during a project should be quickly captured during its execution, but the reality is that project teams rarely make time for this. Can you be different? At the end of the project, a full, planned Retrospective should be held to record the lessons for the benefit of future project teams. If organizations and PMOs within organizations are to grow, learning from experience must be a priority.

Step 9: Continually hone your project communication. This is a holistic step that impacts the success of all the other steps we have outlined. Communication is at the heart of all your activities as a project manager. Whether you are tracking risks and issues, creating your Plan and its detailed sub-elements, reporting progress or running a governance group or anything else, your ability to communicate effectively with people at particular points in time is vital to your success. "One size does not fit all" is a useful maxim to consider for communication. It is a blend of art and science, and getting it right will play a large part in your success.

As we stated at the beginning of this article, we have put forward nine steps that, if done well, can positively influence a project's success. We have deliberately not gone into the technical accuracy of estimates, schedule and the like; such factors are what we consider to be part of the Project Plan. If you bear our holistic nine steps in mind and can execute all of them well, we think you will have the ingredients of a successful outcome – all things being equal. As always, we would very much welcome your comments.