

The PM Survival Toolkit

By Gareth Byatt, Gary Hamilton, and Jeff Hodgkinson

Close your eyes and picture this. You have been set a challenge to trek through one of the great deserts of the globe, perhaps the Great Sandy Desert of Australia, the Mohave of North America, or the Sahara of Africa. As you prepare for your challenge, you calculate the distance, temperatures, walking speed, amounts of water to take and other critical factors that will undoubtedly influence and determine the success or failure of your challenge. You also begin to assess the skills required; survival skills, endurance, how to identify poisonous creatures, and the like. In your planning for this feat of endurance, you must prudently consider every detail and balance the risks and rewards associated with the items you pack for the trip. Due to the limits on the tools and rations you can select, only essential, value-added items will be taken. Several items are sure to make it into your pack: a knife, a map, a GPS, a compass and water to name a few.

We're not really going to trek through the desert. But what if we apply the same approach to Project Management? If we are planning to embark on the journey of the project and create successful outcomes for all involved, what essential skills or tools should we ensure are in our proverbial survival toolkit?

What comprises the essential needs for each project is the project team's decision, using the framework /body of knowledge at your disposal to design your project's "toolkit." While every project is different and has different needs, the following are the items we recommend you seriously consider packing in your PM survival Toolkit.

Project Success Plan: As we described in a previous article, Project Success Planning is an event (a meeting) to ensure all key stakeholders are aligned for the meaning of success. It's not about the "nuts and bolts" of the project; rather, its purpose is to determine how you will work as a team. How you hold your Project Success Plan meeting is up to you – the key is to ensure you achieve a consensus on the expectations of all key stakeholders in the project (from both the supply and demand sides).

Project Management Plan: Just as we wouldn't begin our trek out into the desert without a compass, every project should have a Project Management Plan. The Project Management Plan serves as the guiding rules, directions and steering for the project.

Risks Register: Effective risk management is critical to project success. In our article, "Rescuing Troubled Projects," we contend that ineffective risk management is one of the three primary causes that cause projects to become troubled. The risks register serves as an active tracking mechanism for potential pitfalls or opportunities on the project, and commits people to actions that will prevent risks from turning into issues. If we were trekking through the desert, the risks register would be our guide to avoid danger, perhaps using "triggers" such as our level of water dropping to a certain amount or noting regions known to be inhabited by wild animals. As we continued our path through the desert, we would implement actions to prevent the known risks from turning into reality.

Project Plan and Schedule: In our desert example, we would plan how many kilometers or miles we expected to cover each day and calculate the expected completion date of our trip, as well as the resources we need to complete it in good health. The same is true for any project. When tasks are scheduled to begin, the sequence, etc., are fundamental to project management. The project plan and the accompanying detailed schedule are our road map for the project. No project should go forward without it.

Project Budget: It stands to reason that you need to be fully in control of your budget, using the right methodology to move from an indicative to detailed estimate, delivering against the detailed estimate, tracking and monitoring all costs and change control.

Stakeholder Analysis: Before we set out on any adventure, we would want to know the topology of the terrain. Are there hills, valleys, rivers or areas of barren land? The answers to these questions would help us plan how we navigate the territory. Similarly, for projects we would want to know the stakeholder analysis. Will there be negative stakeholders for whom we must plan mitigation strategies?

Communication Plan: In our desert expedition example, you would probably pack a signaling mirror, a flare gun, or both. Your communication plan for the adventure may consist of a two-way radio with a base for safety, and the flare or mirror as a signal in case of dire emergencies. The more adventurous folks will probably go only with the mirror, as it is lightweight and can serve more than one purpose. Nonetheless, no project should be undertaken without a communication plan. Planning out the when, what, and to whom of project updates – and checking the effectiveness of these communications – will be essential to project success.

Project Management Experience and lessons learned from past projects: One of the best pieces of advice given to the prospective adventurer is know your limitations. Another is to learn from past projects (not your own, those of others). Lacking experience surviving in harsh environments, no prudent person would attempt an adventurous trek like our desert example as their first experience. The same should hold true in project management. Project managers should build on their experiences, growing with each project they undertake and learning from others as well. There are plenty of examples of project managers embarking on very large very complex projects as their first or nearly first projects and finding success, just as there are examples of ordinary people surviving the most extraordinary situations. However, this is not always the case. At minimum, in project management, a mismatch between the experience of the project manager and the project complexity is a risk that should be realized early and actively mitigated or avoided.

Concluding remarks:

Just like real-life adventure survival kits, the PM survival kit you need will depend on the environment you must navigate (or survive as a PM). Granted, some projects will require more items in your travel pack than others, and others in our profession will no doubt have different views about what the critical survival kit should contain. However, what we have mentioned in this article is the barebones survival kit required for the majority of projects.