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ABSOLUTE BEGINNER'S GUIDE

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Fifth Edition

Gregory M. Horine

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Gregory M. Horine

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Project Management Absolute Beginner's Guide, Fifth Edition

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About the Author

Gregory M. Horine is a certified (PMP, Certified Scrum Master, Six Sigma Green Belt) business technology and IT project management professional with a track record of successful results using servant leadership principles and a focused customer orientation. He has been consistently recognized for excellence in people management, leadership maturity, communication skills, problem-solving skills, and establishing long-term client relationships. Primary areas of expertise and strength include the following:

- Project management and leadership
- Complete project life-cycle experience across multiple industries
- Agile, waterfall, and hybrid application development
- Package implementation and integration
- Enterprise solution development
- Application release management
- Application development team management
- Project and portfolio management tools
- Data analysis and transformation
- Business process analysis and improvement
- Testing, quality, and risk management

In addition, Mr. Horine holds a master's degree in computer science from Ball State University and a bachelor's degree in both marketing and computer science from Anderson College (Anderson, Indiana).

Through his servant leadership approach, Mr. Horine has established a track record of empowering his teammates, improving project communications, overcoming technical and political obstacles, and successfully completing projects that meet the targeted objectives.

Mr. Horine is grateful for the guidance and the opportunities that he has received from many mentors throughout his career. Their patience and influence has helped form a rewarding career marked by continuous learning and improvement.

Dedication

This book is dedicated to the "students" that I constantly visualized in my mind as I developed this book—the bright and caring family that surrounds my life, including my wife, parents, siblings, in-laws, aunts, uncles, cousins, and grandparents.

This book is dedicated to my father, Nelson "Bud" Horine, who passed away in 2020. My "best man" who is, and will be, missed.

This book is also dedicated to the parents, families, practitioners, and researchers who are diligently fighting to rescue children from autism spectrum and bipolar disorders.

This book is dedicated to the brave individuals fighting for freedom and against the forces of censorship and tyranny.

This book is dedicated to my key inspirational sources: my incredible wife, Mayme (I still wake up every day with a smile in my heart knowing I am married to her), and my "fabulous five" children: Michael, Victoria, Alex, Luke, and Elayna (each one is a hero to me).

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Introduction

As organizations continue to move toward "project-based" management to get more done with fewer resources—and as the demand for effective project managers continues to grow—more and more individuals find themselves with the opportunity to manage projects for the first time.

In an ideal world, every new project manager candidate would complete certified project management training programs and serve as an apprentice before starting a first project manager opportunity, but...this is the real world. In many cases, a quicker, more accessible, and more economical alternative is needed to guide these candidates in managing projects successfully the first time.

Project Management Absolute Beginner's Guide, Fifth Edition, is intended to provide this alternative in a helpful, fun, and practical style.

About This Book

The objectives of this book include the following:

- To be a pragmatic guide that prepares a new project manager for the "real world."
- To be an easy-to-use tutorial and reference for any person managing a first project.
- To teach the key concepts and fundamentals behind project management techniques. When you understand these, you can apply them effectively independent of toolset, environment, or industry.
- To reduce the on-the-job learning curve by sharing the traits of successful projects and "lessons learned" from less-than-successful projects.
- To balance the breadth of topics covered with adequate depth in specific areas to best prepare a new project manager.
- To review the skills and qualities of effective project managers.
- To emphasize the importance of project "leadership" versus just project "management."

Consistent with the *Absolute Beginner's Guide* series, this book uses a teaching style to review the essential techniques and skills needed to successfully manage a project. By teaching style, I intend the following:

- Offers a mentoring, coaching style that is fun, easy to read, and practical.

- Assumes that the reader does not have previous hands-on experience with project management.
- Teaches the material as if an instructor were physically present.
- Presents the material in task-oriented, logically ordered, self-contained lessons (chapters) that can be read and comprehended in a short period of time (15 to 30 minutes).
- Emphasizes understanding the principle behind the technique or practice.
- Teaches the material independent of specific tools and methodologies.
- Teaches the material with the assumption that the reader does not have access to organizational templates or methodologies.
- Provides a summary map of the main ideas covered at the end of each chapter. Research has shown that this type of "mind-map" approach can drive better memory recollection when compared to traditional linear summary approaches.

OUT OF SCOPE

The scope of this book is clearly outlined in the table of contents, but as I cover later, it is always good to review what is out of scope to ensure understanding of the scope boundaries. Because the field of project management is extremely broad, and I needed to draw the line somewhere, this book focuses on the proper management of a single project. As a result, the following advanced project management subjects are not covered in this book:

- Program management
- Enterprise portfolio management
- Enterprise resource management
- Advanced project risk management
- Advanced project quality management
- Advanced project procurement management
- Advanced enterprise agile management

DISCLAIMER

Although there are definitely concepts, fundamentals, and techniques covered in this book that are of enormous assistance to anyone taking the PMP certification exam, this book is not intended to be an exam preparation guide.

The focus of this book is not on theory, academia, or the *PMBOK Guide* (PMI's A *Guide to the Project Management Body of Knowledge*). The focus is on getting the first-timer ready to manage a first project in the real-world environment.

Although the PMBOK is an admirable industry standard, it is updated every four years to better capture the evolving knowledge in the field and to improve the consistency and clarity of the standards. It is not intended to be a "how-to" guide for a first-time practitioner.

That being said, the latest PMBOK edition, Version 7, has undergone a significant shift toward principles and outcomes versus its historical focus on prescriptive processes, so it is more aligned with the spirit of this book now. In addition, there is a bonus chapter on PMP exam-preparation pointers in Chapter 26, "Powerful PMP Exam Tips," that was added in the Fourth Edition. This chapter is updated to account for the changes in PMBOK Version 7.

Who Should Read This Book?

Project Management Absolute Beginner's Guide, Fifth Edition, is recommended for any person who fits into one or more of the following categories:

- Individuals unsatisfied with other introductory project management books
- Individuals new to project management, such as
  - Technologists
  - Knowledge workers
  - Students
  - Functional managers
- Professionals taking a first project management assignment, such as
  - Team leaders
  - Project coordinators

  - Project administrators
  - Project support staff
- Experienced project managers needing a refresher course
- Experienced project managers with limited formal project management education

How This Book Is Organized

This book has been divided into five parts:

- Part I, "Project Management Jumpstart," sets up the general framework for our project management discussion and accelerates your project management learning curve, including an insightful review of successful projects and project managers.
- Part II, "Project Planning," reviews the processes that establish the foundation for your project.
- Part III, "Project Control," reviews the processes that enable you to effectively monitor, track, correct, and protect your project's performance.
- Part IV, "Project Execution," reviews the key leadership and people-focused skills that you need to have to meet today's business demands.
- Part V, "Accelerating the Learning Curve...Even More," provides experienced insights and tips to better handle real-life project situations that will further accelerate the knowledge base and skill level of the new project manager. Key topics include making better use of Microsoft Project, dealing with real-world situations, and other topics that a new project manager is likely to encounter in today's rapidly changing environment.

What's New in This Edition

While the key principles of project management, leading teams, and effective communication that this book has focused on since 2005 are timeless, this book has always been ahead of the curve in addressing leading-edge trends in projects and project management and in providing powerful tips to help reduce the learning curves for new project managers. Hot key trends in project management, such as agile approaches, leading virtual/remote teams, leading disparate teams, and cloud collaboration tools, have been included since the first edition.

However, it has been four years since the fourth edition, and adoption of many these leading-edge approaches and techniques have now become mainstream.

In this edition, existing sections have been enhanced with additional material on those trends mentioned before, especially agile approaches. We will explore the role of the Project Manager in the agile world, discuss the differences between a Scrum Master, a Product Owner, and a Project Manager, and talk about what to do if you are asked to serve as both the Project Manager and the Scrum Master. For those in the IT space, we will explore how the adoption of DevOps and DevSecOps impacts the project manager and the efforts they manage.

On top of that, all references to the PMBOK have been updated with the *PMBOK Guide* – Seventh Edition references (released in August 2021), and the chapter on PMP exam preparation (Chapter 26) has been updated accordingly.

Conventions Used in This Book

Throughout the book, I use the following conventions and special features:

- At the beginning of each chapter, you find a quick overview of the major topics that are expounded upon as you read through the material that follows.
- The end of each chapter provides a list of key points along with a visual summary map.
- You also find several special sidebars used throughout this book:

NOTE These highlight specific learning points or provide supporting information to the current topic.

TIP These highlight specific techniques or recommendations that could be helpful to most project managers.

CAUTION These highlight specific warnings that a project manager should be aware of.

IN THIS CHAPTER

- Review the different roles played by the project manager
- Review the key skills every project manager should possess
- Learn why some project managers are much more successful than others
- Understand the common mistakes made by many project managers
- Review differences between Project Manager, Scrum Master, and Product Owner

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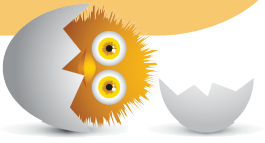


THE PROJECT MANAGER

As we reviewed in Chapter 1, "Project Management Overview," the project manager has many activities to perform, challenges to overcome, and responsibilities to uphold over the life of a project. Depending on your individual experiences, your industry background, and the manner in which project management has been implemented, that review might have been quite enlightening to you.

To ensure that we have a common understanding of what a project manager does, in this chapter I review the different roles a project manager plays over the life of a project and discuss the prerequisite skills that you need to perform those roles. Most importantly, I accelerate your learning curve by sharing the characteristics of successful project managers and the common mistakes made by many others.

One Title, Many Roles

You've likely heard many of the analogies before to describe the role of project manager—the "captain" of the ship, the "conductor" of the orchestra, the "coach" of the team, the "catalyst" of the engine, and so on. There's truth and insight in each of the analogies, but each can be incomplete as well. To gain better understanding of what a project manager does, let's briefly discuss each of the key roles played by the project manager:

- **Planner**—Ensures that the project is defined properly and completely for success, all stakeholders are engaged, work effort approach is determined, required resources are available when needed, and processes are in place to properly execute and control the project.
- **Organizer**—Using work breakdown, estimating, and scheduling techniques, determines the complete work effort for the project, the proper sequence of the work activities, when the work will be accomplished, who will do the work, and how much the work will cost.
- **Point Person**—Serves as the central point of contact for all oral and written project communications.
- **Quartermaster**—Ensures the project has the resources, materials, and facilities it needs when it needs it.
- **Facilitator**—Ensures that stakeholders and team members who come from different perspectives understand each other and work together to accomplish the project goals.
- **Persuader**—Gains agreement from the stakeholders on project definition, success criteria, and approach; manages stakeholder expectations throughout the project while managing the competing demands of time, cost, and quality; and gains agreement on resource decisions and issue resolution action steps.
- **Problem Solver**—Utilizes root-cause analysis process experience, prior project experience, and technical knowledge to resolve unforeseen technical issues and take any necessary corrective actions.
- **Umbrella**—Works to shield the project team from the politics and "noise" surrounding the project, so they can stay focused and productive.
- **Coach**—Determines and communicates the role each team member plays and the importance of that role to the project's success, finds ways to motivate each team member, looks for ways to improve the skills of each team member, and provides constructive and timely feedback on individual performances.

- **Bulldog**—Performs the follow-up to ensure that commitments are maintained, issues are resolved, and action items are completed.
- **Librarian**—Manages all information, communications, and documentation involved in the project.

NOTE Although there is consensus that the disciplines and techniques used in project management can be applied in any industry, there is no consensus on whether individual project managers can be effective in a different industry.

There is no doubt that the more knowledge and experience that a project manager has in the subject matter area of the project, the more value they can offer. However, depending on the size of the initiative and the team composition, a project manager with different industry experience can bring tremendous value if that person is strong in the other four key skill categories discussed.

- **Insurance Agent**—Continuously works to identify risks and develop responses to those risk events in advance.
- **Police Officer**—Consistently measures progress against the plan, develops corrective actions, and reviews the quality of both project processes and project deliverables.
- **Salesperson**—An extension of the Persuader and Coach roles, focuses on "selling" the benefits of the project to the organization, serving as a "change agent," and inspiring team members to meet project goals and overcome project challenges.

Key Skills of Project Managers

Although a broad range of skills is needed to effectively manage the people, process, and technical aspects of any project, it becomes clear there is a set of key skills that each project manager should have. Although these skill categories are not necessarily exclusive of each other, let's group them into five categories to streamline our review and discussion:

1. **Project Management Fundamentals**—The "science" part of project management, covered in this book, including office productivity suite (such as Microsoft Office, email, and so on), project management software, project collaboration tool, and work management tool skills.

2. **Business Management Fundamentals**—Those skills that would be equally valuable to an operations or line-of-business manager, such as budgeting, finance, procurement, organizational dynamics, team development, performance management, coaching, and motivation.

TIP Active listening is one of the secret weapons of effective project managers.

3. **Technical Knowledge**—The knowledge gained from experience and competence in the focal area of the project. With it, you greatly increase your effectiveness as a project manager. You have more credibility, and you can ask better questions, validate the estimates and detail plans of team members, help solve technical issues, develop better solutions, and serve more of a leadership role.

4. **Communication Skills**—Because communication is regarded as the most important project management skill by the Project Management Institute (PMI), I feel it is important to separate these out. Skills included in this category include all written communication skills (correspondence, emails, documents), oral communication skills, facilitation skills, presentation skills, and—the most valuable—active listening. *Active listening* can be defined as "really listening" and the ability to listen with focus, empathy, and the desire to connect with the speaker.

NOTE The specific combination of skills required for a project manager to be successful on a given project varies depending on the size and nature of the project. For example, as a general rule, on larger projects, technical knowledge is less important than competence in the other skill categories.

5. **Leadership Skills**—This category overlaps with some of the others and focuses on the attitude and mindset required for project management. However, it also includes key skills such as interpersonal and general people relationship-building skills, adaptability, flexibility, people management, degree of customer orientation, analytical skills, problem-solving skills, and the ability to keep the big picture in mind.

NOTE In *PMBOK Guide* – Sixth Edition, PMI combines these key skill sets into three groups in the PMI Talent Triangle (shown in Figure 1.2):

Technical project management—The knowledge, skills, and behaviors related to specific domains of project, program, and portfolio management. The technical aspects of performing one's role.

Leadership—The knowledge, skills, and behaviors needed to guide, motivate, and direct a team, to help an organization achieve its business goals.

Strategic and business management—The knowledge of and expertise in the industry and organization that enhances performance and better delivers business outcomes.

I know, I know...after reading this, you are probably thinking either one or more of the following:

- "You must be kidding! I need to be good in all those areas to manage a project?"
- "Wait! I've been on projects before, and I've yet to see a project manager who could do all that."
- "Wait, you must be kidding! If anyone was excellent in all those areas, they'd be a CxO of our company."

To help address these thoughts, please understand two important observations:

1. Many projects are not successful.
2. You do not need to get an "A" in all these categories to be successful as a project manager.

The key is that the project manager has the right mix of skills to meet the needs of the given project. In addition, a self-assessment against these skill categories enables you to leverage your strengths, compensate for your deficiencies, and focus your self-improvement program.

Qualities of Successful Project Managers

Given the many roles played by a project manager, the broad range of skills needed, and the inherent challenges in successfully delivering a project, we need to find ways to accelerate the learning process. Two key ways to accelerate our learning are understanding the qualities of successful project managers and understanding the common mistakes made by project managers.

Successful project managers do not share personality types, appearances, or sizes, but they do share three important features:

- They excel in at least two of the five key skill categories (Project Management Fundamentals, Business Management Skills, Technical Knowledge, Communication Skills, Leadership Skills) and are either good enough in the other categories or staff their teams to compensate for their deficiencies.

- They avoid the common mistakes described in the next section.
- They bring a mindset and approach to project management that is best characterized by one or more of the following qualities:
  - **Takes ownership**—Takes responsibility and accountability for the project, leads by example, and brings energy and drive to the project; without this attitude, all the skills and techniques in the world will only get you so far.
  - **Savvy**—Understands people and the dynamics of the organization; navigates tricky politics; has the ability to quickly read and diffuse emotionally charged situations; thinks fast on their feet; builds relationships; leverages personal power for benefit of the project.
  - **Intensity with a smile**—Balances an assertive, resilient, tenacious, results-oriented focus with a style that makes people want to help; consistently follows up on everything and their resolutions without annoying everyone.
  - **Eye of the storm**—Demonstrates ability to be the calm eye of the project hurricane; high tolerance for ambiguity; takes the heat from key stakeholders (CxOs, business managers, and project team); exhibits a calm, confident aura when others are showing signs of issue or project stress.
  - **Strong customer-service orientation**—Demonstrates ability to see each stakeholder's perspective; able to provide voice of all key stakeholders (especially the sponsor) to the project team; has strong facilitation and collaboration skills; has excellent active listening skills.
  - **People-focused**—Takes a team-oriented approach; understands that methodology, process, and tools are important, but without quality people it's very difficult to complete a project successfully.
  - **Always keeps "eye on the ball"**—Stays focused on the project goals and objectives. There are many ways to accomplish a given objective, which is especially important to remember when things don't go as planned.
  - **Controlled passion**—Balances passion for completing the project objectives with a healthy detached perspective, which enables them to make better decisions, to continue to see all points of view, to better anticipate risks, and to better respond to project issues.
  - **Healthy paranoia**—Balances a confident, positive outlook with a realism that assumes nothing, constantly questions, and verifies everything.
  - **Context understanding**—Understands the context of the project—the priority that their project has among the organization's portfolio of projects and how it aligns with the overall goals of the organization.

- **Looking for trouble**—Constantly looking and listening for potential risks, issues, or obstacles; confronts doubt head-on; deals with disgruntled users right away; understands that most of these situations are opportunities and can be resolved upfront before they become full-scale crisis points.

15 Common Mistakes of Project Managers

Although we review many of the common errors made in each of the fundamental areas of project management throughout this book (so you can avoid them), understanding the most common project management mistakes helps focus our efforts and helps us to avoid the same mistakes on our projects. The following are some of the most common mistakes made by project managers:

1. Not clearly understanding how or ensuring that the project is aligned with organizational objectives.
2. Not properly managing stakeholder expectations throughout the project.
3. Not gaining agreement and buy-in on project goals and success criteria from key stakeholders.
4. Not developing a realistic schedule that includes all work efforts, task dependencies, bottom-up estimates, and assigned leveled resources.
5. Not getting buy-in and acceptance on the project schedule.
6. Not clearly deciding and communicating who is responsible for what.
7. Not utilizing change control procedures to manage the scope of the project.
8. Not communicating consistently and effectively with all key stakeholders.
9. Not executing the project plan.
10. Not tackling key risks early in the project.
11. Not proactively identifying risks and developing contingency plans (responses) for those risks.
12. Not obtaining the right resources with the right skills at the right time.
13. Not aggressively pursuing issue resolution.
14. Inadequately defining and managing requirements.
15. Insufficiently managing and leading the project team.

Project Manager Versus Scrum Master Versus Product Owner

With the increasing adoption of agile project approaches, and the Scrum agile methodology in particular, there is often some initial confusion about how a Project Manager fits in this environment, since the Scrum methodology does not define a Project Manager role. And frankly, many organizations struggle to figure out how to leverage their existing project managers as they transition to agile and Scrum project approaches. Often, it is this struggle that leads to the confusion and the uncertainty surrounding the Project Manager role.

In summary, once you understand the role of the Scrum Master, the Product Owner, and the Project Manager, it's much easier to see the importance of each role and why they are all needed for a successful agile Scrum project.

NOTE The Scrum Guide is the official process and terminology document published by Scrum.org. The co-creator of the Scrum agile process, Ken Schwaber, founded Scrum.org as a mission-based organization to help people and teams solve complex problems by applying Scrum through training courses, certifications, and ongoing learning, all based on a common competency model.

Let's briefly discuss each role to jump-start this understanding:

- **Scrum Master**—A defined Scrum Guide role that is focused on the core team and guiding them through the Scrum process. The Scrum Master is both a coach and a facilitator for the development team, the Product Owner, and often the organization. This role is focused on the work process, alleviating bottlenecks and continuously striving for process improvement.
- **Product Owner**—A defined Scrum Guide role that is focused on maximizing the value of the product being delivered. The Product Owner is responsible for defining the backlog items (for example, requirements and features), setting priorities, and providing feedback to the core development team after each sprint (work increment).
- **Project Manager**—Serves as overall leader and manager of the project itself. This role works with the Scrum Master and Product Owner to ensure that the needs of the organization and business are being met. The Project Manager is responsible for delivering the project on time, within budget, and within the agreed-upon scope. In addition, the Project Manager handles building the team, securing the budget, development and maintenance of project schedules, delivering project communications, managing project issues and risks, and coordinating release deployments.

Seems fairly straightforward, right? So where does the confusion come into play? In my experience, the confusion stems from one, if not all, of these factors:

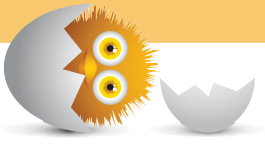
- Some of the traditional Project Manager functions are shared by the Scrum Master and the Product Owner.
- The Scrum Master and/or Product Owner roles have not been properly staffed and/or individuals lack the requisite Scrum training.
- A single individual is serving a combination of these roles.

Is it possible for a single person to serve a combination of these roles? Sure, but it does run the risk of highly compromising the Scrum process. The most common scenario that can be successful is one in which the Project Manager also serves as the Scrum Master, but this does assume the Project Manager has the appropriate skills, training, and time to serve both roles properly. In general, the more aligned the organization is with the Scrum agile roles, and the more mature an organization becomes with successfully leveraging the Scrum approach, the clearer the differences and the importance of each of these roles become.

THE ABSOLUTE MINIMUM

At this point, you should have a high-level understanding of the following:

- The different roles played by the project manager
- The five key skill areas every project manager should master
- The common qualities of successful project managers
- The common mistakes made by project managers
- The difference between a Project Manager, Scrum Master, and Product Owner on an agile project
- The Scrum guide is available from Scrum.org at this url: https://www.scrum.org/resources/scrum-guide



The map in Figure 2.1 summarizes the main points we reviewed in this chapter.

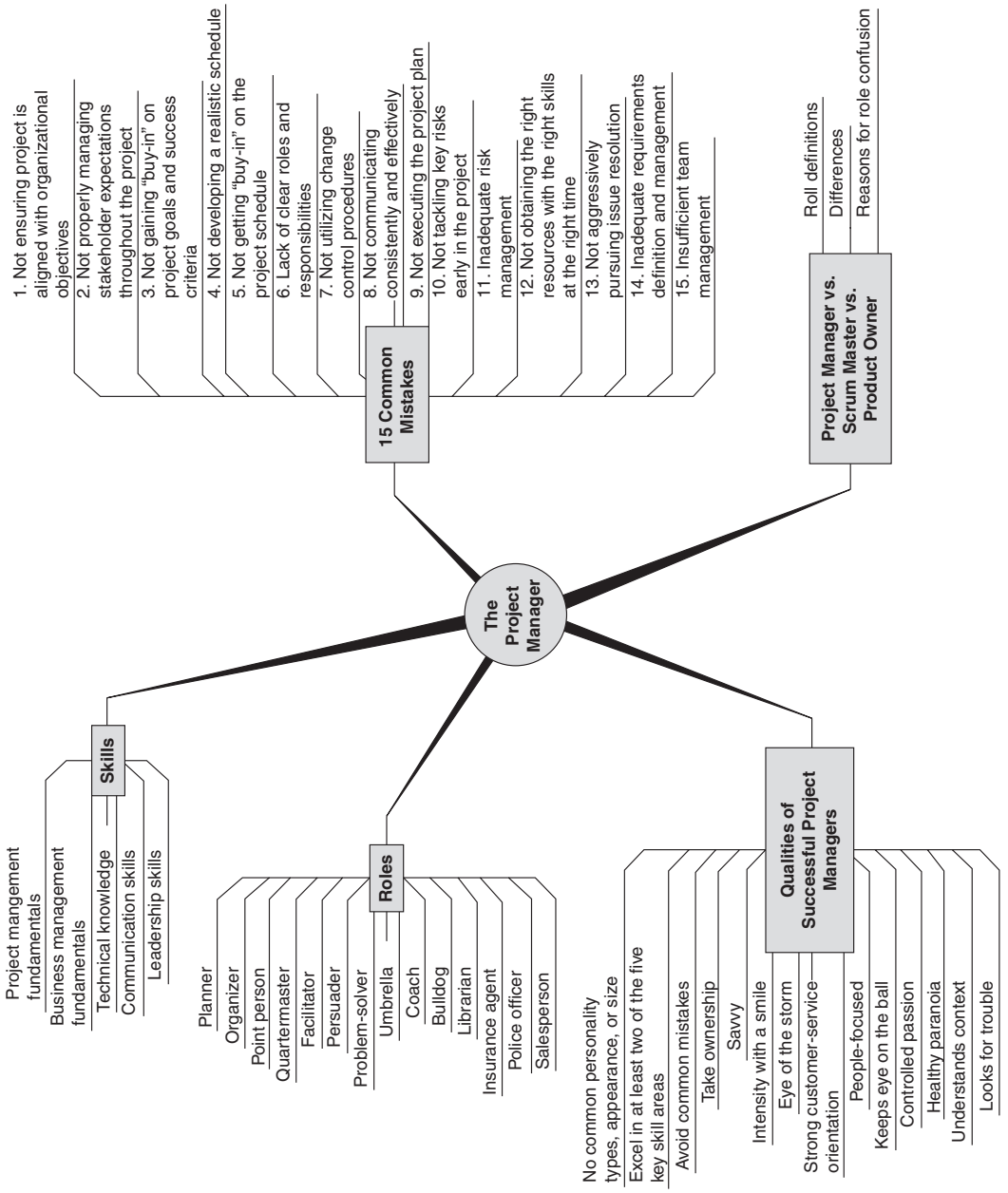


FIGURE 2.1

Project manager overview.

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