BKPM

BARE KNUCKLED
PROJECT MANAGEMENT

POCKET GUIDE
FOR PROJECT MANAGERS
Release 4

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BKPM Pocket Guide for Project Managers – Release 4

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Forward

This pocket guide is based upon the principles and frameworks presented in, <u>Bare Knuckled Project Management; How to Succeed at Every Project</u>. What is BKPM? In a word, **control**. Bare Knuckled Project Management is first and foremost a mindset; a learned, limbicly conditioned, level of effectiveness that provides reliable options for action even when rational decision-making goes out the window. It is a framework for explaining how to achieve and maintain control over both typical and highly complex projects. **It works** because we recast the role of a project manager and adhere to a set of guiding principles that we use to reframe how we view and manage projects. **It endures** because we systematically alter the instinctive responses of project managers to be effective in the face of project wild-cards like stress and data overload. BKPM is simple, direct and effective. It leverages the knowledge and techniques of traditional project management, like those found in PMBOK (PMI's Project Management Body of Knowledge), but does so with a bias toward control and momentum vs. process. BKPM works in **Agile** and **Waterfall** projects. It does so because it is a new way to think about projects, not a project management process.

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How to Use This Guide

Think follows key Project Management principles in everything we do. So, put this guide next to your keyboard, in a convenient pocket, stain it with coffee rings or condensation from a cold drink, but keep it handy. This is your get out of jail free card; however, it isn't magic. It's a tool and you'll need to learn *how* and *when* to use it. It applies to working with your sales team, starting a project and getting it under rapid control regardless of development methodology (e.g. agile, waterfall), to closing out a Think project.

The single most difficult thing for you to learn is when you should reach for this guide. Believe it or not, you already know. You just don't know that you know and you need to become more attuned with your feelings. That's right, you're human, you have a powerful brain and a big part of your brain gives you your feelings. These are the single most valuable indicator that you need to do something different. Consider this, while managing a project, if you feel anything other than absolute control, it's time to figure out why. Feelings like anxiety, fear, concern, or perhaps worst of all, indifference, are BIG indicators and tell you that you need to be doing something other than what you are.

When you feel anything other than control, ask yourself, **"Why?"** You may know and simply need to slow down enough to realize it. Even more likely, especially at first, you'll ask yourself why and reach the conclusion, **"I have no clue."** As soon as that happens, grab this guide! There are many useful tips in this guide including PM principles, Think's Rapid Control Process, project kick-off job aids and much more.

BKPM Guidance for Transformation

Are you ready to hack your brain to become a BKPM? It is possible; you just need to learn to slow down your thinking and trigger the cognitive frame shifting that makes you look at a project the way a BKPM does. Over time, this becomes an intuitive conditioned behavior and you'll become a master performer that seems to think ahead of everyone else.

BKPM 10 Minute Daily Checklist

1. Look at your project plan:
   a. Are you on track on all active tasks?
   b. Are all of your resources focused on what they should be?
2. What could possible go wrong today? What could possibly go right?
   a. Run through ALL of the BKPM principles.
   b. Have a feeling? Develop a plan of action and execute.
3. Clear your mind and put your Strategic Project Manager hat on:
   a. Evaluate your own tactical efforts.
   b. Seeing any cultural shredders?
   c. Are you able to recognize lurking project constraints?
   d. Where might the project hold intrinsic value to the organization that can be captured?
4. Execute!

* reference the project phase guidance that follows for more details

Project Phase Guidance and Details

Start of Project

It doesn't matter what the project is, you must immerse in its details to develop a minimal level of ownership in the process you document and manage to. Work through the Rapid Control Process (RCP); it is detailed in your pocket Guide. Adjust each step in the RCP so it is right-sized for your project, but complete it! Make sure your project plan has enough detail (tasks, resources and deliverables) to understand what everyone should be working on when you look at it each day.

Daily Checklist (additional detail)

Dedicate 10 minutes of your morning to think through your project like a BKPM:

1. Look at your project plan. Answer these questions:
   a. Are you on track on all active tasks? Don't assume. How do you verify?
   b. Are all of your resources focused on what they should be? Again, how do you verify?
2. Ask yourself, "**What could possible go wrong today?**" It's far more difficult to answer than you could possibly imagine. This is where you must learn to slow down your thinking and use cognitive frame shifting:
   a. Run through ALL of the BKPM principles. Many will not apply to the specific stage of the project you are in, that context is ever changing, but some will.
   b. When you read a principle that causes you to have a feeling that is anything but control, investigate it. Develop a plan of action and execute.

Now ask yourself, "**What could possibly go right today?**" Are you prepared to take advantage of it?

    a. Is it possible to complete a task early; can you accelerate other tasks; can you use the break to capture value in another way?

    b. Can you use an Access Portal that you have previously established; can you create a new one; how do you demonstrate that you have control?

    c. Is there an opportunity to publicly recognize progress made or relate accomplishments to new business capabilities; can you look beyond the Triple Constraints to correlate progress with business value?

3. Clear your mind and put your Strategic Project Manager hat on:

    a. Evaluate your own tactical efforts. Is the project showing any signs of straining the triple constraints? If so, start laying access portals and tighten-up risk mitigation. You are not responsible for the solution; develop a process that identifies multiple solutions.

    b. Are you beginning to recognize any cultural shredders? Do you need to adjust expectations or plans?

    c. Are you able to recognize project constraints outside of the tactical time, cost, scope parameters? There are often project constraints that lurk just below the surface of daily project activity.

    d. Think about the project from the point of view of the project sponsor and their key stakeholders. Do you think you understand their needs and concerns? How

do you push gently to learn more about their value
system? Where might the project hold intrinsic value
to the organization that can be captured? Should you
develop an access portal for it?

OK, now execute!

Project Wrap-Up
Projects can sometimes wind-down slowly and eventually meet
an unceremonious end. That's bad news for a BKPM and
exposes your project process and standards of execution to
undue risk.

1. Determine if project requires team-based Capturing Value
   meeting. If so plan and conduct.
2. Wrap-up project documentation and archive appropriately
3. Hand-off any ongoing tasks formally and publicly.
4. Develop your last status report and deliver it
5. Consider if you have created any additional principles or if
   you have recognized any cultural shredders. If so,
   document and share them with your BKPM peers.

Think's Rapid Control Process

Our framework for initiating new Business Intelligence projects and getting them under control is called the Think Rapid Control Process. The roles, responsibilities, deliverables, and artifacts that must be "buttoned-up" in order to be successful are presented below.

1. Discovery & Immersion

Organize and consume all historical project knowledge and artifacts. Includes meetings with key individuals, review of documentation, etc. Conduct the initial meeting (reference: Initial Project Meeting: Readiness Review) and follow through on any To Do's and Open Action Items. At the conclusion of this phase, conduct a Project Kickoff Readiness Review meeting to present your full project understanding and correct any discrepancies in the early stages of planning.

Deliverables: working knowledge of the project.

Participants: Think Account Manager, Strategic PM, Tactical PM, Client Stakeholders

Work Effort: Usually 8-24 hours, depending on complexity of the project.

2. Planning

Multi-pass planning starting with "Strawman Plan" development, reflection of plan with key individuals, resource development, timeline/outcome balancing.

Deliverables: Draft Project Charter, Project Plan, Resource Plan, List of Risks, other supporting documents as needed.

Participants: Strategic PM, Tactical PM, Client Stakeholders

Work Effort: Typically 24-80 hours, depending on complexity of the project.

3. Validation & Risk Mitigation

The Draft Plan is subjected to the stress of validation and risk mitigation to determine fragility. Involves tough discussions of how risks will be confronted as they emerge in the project.

Deliverables: Near-final Project Plan, Resource Plan, Risk Plan, Schedule, Approval to Proceed, and agenda for the Kick-off Meeting.

Participants: Strategic PM, Tactical PM, Client Stakeholders, BA if required.

Work Effort: Typically 8-40 hours, depending on complexity of the project.

4. Kick Off

Think presents the final project documentation package (all documents created in previous steps) to the stakeholder team. Ownership of tasking is cemented and ground rules for engagement are discussed and accepted by team members. Final adjustments are made and advertised.

Deliverable: **FULL PROJECT CONTROL**.

Participants: Strategic PM, Tactical PM, Client Stakeholders, BA if required.

Duration: Preparation requires a few hours to a day of work (2-8 hours) culminating with the Kick-off meeting.

5. Active Management & Control

Once the kickoff is complete, the Tactical PM will actively control the project by socializing it with appropriate personnel, managing the tempo, conducting weekly review meetings, and by providing reporting and tracking updates. Risks encountered are confronted aggressively.

Deliverables: Project Tempo, Weekly Reporting, Active Risk Management of the Project. The process is now owned by the Tactical PM; the outcome of the project is fully owned by the project sponsor.

Participants: Strategic PM (as needed for meetings and risk mitigation), Tactical PM, Client Stakeholders, BA and Strategic Communication Manager if required.

Work Effort: Varies depending on the level of complexity of the project, from 8-40 hours per week by the Tactical PM and a few hours per week by the Strategic PM, as determined by the resource plan.

Roles in the Rapid Control Process

In the Think Rapid Control Process, there are unique roles for project managers. These are the Strategic PM and the Tactical PM and Business Analyst, who must work together to achieve proper control of the project quickly. While there are times when the Strategic and Tactical PM role is filled by one resource, the approach used more often is split to capitalize on the thinking of two distinct resources and make our plans less fragile in response to risk. Distinguishing the two allows us to substantially mitigate all known risks and keep the proper perspective on the project by maintaining relationships in accordance with the Three-Sided Table.

Strategic PMs (SPM) are broadly experienced, having served many years as a tactical PM, and are capable of creating and articulating a clear vision for the process of achieving the desired outcome. The SPM leads the Discovery and Immersion meetings to uncover the success criteria and objectives; uses success criteria and objectives to develop strategic options that will help drive the project from inception through planning/immersion; leverages strategic options to design an appropriate approach with the project sponsors, and; works with the tactical PM to create the "Strawman" (early draft) project plan, validate the plan, mitigate risks, and achieve active control of the project.

Tactical PMs (TPM) are quick learners who are driven, astute, nimble, highly detailed and analytical. They use a Bare Knuckled approach and partner with their SPM to mitigate risk and implement the Three-Sided Table to drive projects to completion. They quickly plug-in and drive the project tactically,

document and reflect back the project goals and priorities to management and project sponsors. They effectively integrate into an existing client team but remain highly tactical and operate at arm's length.

Strategic PMs actively facilitate and aggressively control project discovery meetings with key stakeholders while tactical PMs synthesize that information to develop comprehensive project plans, determine other project artifacts that may be needed, vet the project plan with the project team and key stakeholders to gain commitment and make the project plan "anti-fragile." Control of the project transfers to the Tactical PMs at the kick off meeting, and then the TPM manages the schedule via the project plan, weekly meetings, and weekly status reports. This is a true partnership between the two roles with clear delineation between the roles.

The Business Analyst (BA) role exists as a support role to the Tactical PM but occupies the fulfillment team side of the three-sided table. Many companies assume that the PM will conduct business analysis as part of their project management duties. Although we are all accustomed to doing some business analysis as PMs, as a function in a project, designating the "BA stream" of work has many advantages in the project and produces higher quality than merging that function with the PM role.

BAs drive requirements at various levels of detail and are highly inquisitive with attention to detail. They work side by side with the PM, client, and multi-disciplinary teams to analyze and synthesize complex information and produce clear written

requirements; own requirements specifications and the gap analysis process, work with the client and PM to set the scope and schedule and help manage within the Triple Constraints; assist with the testing and delivery; design the formal client acceptance process, and; create user and system documentation and participate in client training and transition.

Another, optional yet sometimes essential, role is that of the Strategic Communications Manager (SCM). The SCM role is reserved for high-touch, high-polish communications campaigns in projects that effect large numbers of stakeholders. The SCM is responsible for the design and execution of external strategic communications campaigns that build awareness, set expectations, and increase adoption of new software and processes. No matter how well software functions, if no one uses it, it is a failure. This kind of deliberate communications approach has been very successful for many IT projects.

RCP – Initial Project Meeting (Immersion)

Initial Project Meeting: Readiness Review

The Initial Project Meeting (Immersion) is an activity that is a part of Think's Rapid Control Process. Prior to attending this initial meeting, make sure you are ready and have reviewed the goals of the Initial Project Meeting. Plan exactly how you will facilitate and what you want to achieve. The Initial Project Meeting is designed to qualify project scope, list deliverables and high-level planning chunks, identify risk and mitigation plans, and agree on commitment dates with the Customer/Sponsor. This meeting enables Project Managers to restate what is known (typically minimal) and quickly build on that knowledge to further immerse in the project.

RCP – Initial Meeting

During Think's RCP – Initial Project Meeting, the PM team, consisting of a Strategic PM (SPM) and Tactical PM (TPM), should facilitate through project discovery discussions using these seven categories as organizers, at a minimum:

1. To Do List (immediate actions during the RCP Initial meeting)
2. Rough Scope Statement (what's in / what's out)
3. Project Plan Outline (high level chunks)
4. Key Resources
5. Risk Registry (+ draft mitigation)
6. Open Action Items (e.g., known areas that require additional analysis)
7. Commitment Dates

Each of these specific areas define a starting path to get Rapid Control. They are used to capture project related details with the

PM team in a short working session, ideally in a "war room" environment, using a white board or large Post It pads. This methodology allows for a collaborative session and creates a starting point from which the PM can start planning. Each of the categories are described in more depth below.

To Do List

The To Do List should be a quick action list of items to review/kick off in the RCP Kickoff Meeting. At the conclusion of the RCP – Initial Meeting, the To Do List may include the following items:

1. Review Notes (SPM/TPM)
2. Project Plan Outline (TPM)
    a. Create STRAWMAN Plan
    b. Upload Plan to Think Corporate SharePoint Drive
    c. Add High Level Chunks (Deliverables) to Project Plan
3. Project Charter (SPM)
    a. Use Notes to Define Scope Statement
    b. Draft Initial Charter
4. Risk List (TPM)
    a. Add initial mitigation statements
    b. Add to Project Summary Report
5. Key Resources
    a. Add to Project Plan
6. Budget Review (SPM with Customer/Sponsor)
7. Next Steps
    a. Create Project Summary Report (Draft)
    b. Create Executive Summary Report (Draft)
8. Commitment Dates
    a. Draft Plan Commitment Date

      b.   Hardened Plan Commitment Date
      c.   Project Kickoff Meeting: Readiness Review Date (Customer/Sponsor Meeting prior to Kickoff Meeting)
      d.   Project Kickoff Meeting Commitment Date

This list can include additional items but is a good start to keep the team moving through the Initial Project Meeting process.

Rough Scope Statement

No matter how formally (i.e., in a Project Charter) or informally the project scope statement is documented, it is imperative to push on the project scope to test what's in and what's out of scope. The project scope is not only needed to define project level boundaries (e.g., technical capabilities; final deliverables) but is also needed to define the sphere of influence that the PM must control. For example, if your project's outcome owner tells you that, "I have a different team that can take care of that." You need to learn what happens if they don't. Typical PM challenges might include: Are you sure? Should I manage them? If they don't, do you want me to find someone who will? Do we need to discuss options if they don't come through as you expect? Will you have them report progress status to me?

Project Plan Outline (high-level chunks)

During the RCP – Initial Meeting, it is important to document the project in high-level chunks and to not dive too deeply into any specific area until the full breadth of the project scope is defined. This is a critical error that many PMs will experience while in the stress of facilitating the initial meeting. Your goal is to uncover all areas of the project that require a process for completion and that need to be monitored for status. It is also critical to

communicate the standards and expectations that you have for level of detail in plans and in reports. Often, the level of detail in a practical plan for a PM will overwhelm other team members and you must learn what level of detail is appropriate for team consumption.

Key Resources
This is fairly simple and straight-forward list of people, hardware, services, software, facilities, etc. Once key resources are identified, you must learn if there are going to be competing demands for those resources, who manages them, and what priority level outside demands have. Many organizations are accustomed to thinking of resources as though they were fixed. Explore the possibility of outside resources in order to provide options in case of low productivity, technical issues, and/or to find project acceleration opportunities.

Risk Registry
At first, risks will typically be fairly high-level. Even at this stage, however, they cannot exist as identified risks without some form of mitigating action. The mitigating action doesn't necessarily need to be corrective action, but it must be a plan of action that is discussed and agreed to before the risk manifests itself in the form of project impact. Early in a project think more about process. What are we going to do? Who needs to be involved? How will it affect the Triple Constraints? Remember the PM owns the process not the solutions. Solutions must come from the team who will execute the solution and must be agreed to by all parties. You will likely leave your side of the Three-Sided Table in order to facilitate solution discovery and to develop

Access Portals. Leave briefly and get back to your side of the table.

Open Action Items

Open action items differ from items on the To Do List, but may overlap. Many projects are already in progress at some level and existing open action items may exist. Often they are still open because someone has not taken time to chunk them down into actionable tasking and does not own the process that will lead them to completion. Open action items often suffer from analysis paralysis and may affect the scope of the project or present risks to the project that must be mitigated. Document open action items and determine what needs to be accomplished to close them out if necessary.

Commitment Dates

It is critical to discuss several standard RCP commitment dates and ensure they are attainable and realistic, as these are the earliest indicators to the Customer/Sponsor of Think's performance. The four dates listed below allow the Project Manager to get immersed, meet with key resources, adequately understand the scope of work, determine the resources needed and establish the time the project will needed given the Triple Constraints.

Draft Plan (STRAWMAN) Commitment Date:

This is the date the Tactical Project Manager agrees to have a rough project plan in place and ready to review with the Strategic Project Manager. It is likely that the plan will still have unknowns as this date approaches, but it is important that the TPM's plan aligns with the SPM's vision. During the Draft Plan review

meeting the SPM will walk through the project plan with the TPM to ensure the direction of the project is on target and discuss changes/edits and next steps. Additionally any new risks can be discussed for a mitigation plan.

Hardened Plan (anti-fragile) Commitment Date:

This is the date the Tactical Project Manager agrees to have a hardened project plan ready for review with the Strategic Project Manager, prior to the Kickoff Readiness Review meeting with the Customer/Sponsor. This date is typically set a couple of days prior to the Kickoff Readiness Review meeting so the plan should be as close to complete as it can. The TPM should be prepared to complete a 'dry run' walk-through as if presenting to the Customer/Sponsor and be prepared to make any last minute updates prior to the Customer/Sponsor meeting.

Project Kickoff Meeting: Readiness Review Date:

This is the date both the Strategic and Tactical Project Managers agree to have a project charter, project plan, a risk registry with mitigation plans, resource allocation report and project summary report ready for presenting to the Customer/Sponsor. This meeting is where the Customer/Sponsor has the ability to ask questions about the plan, therefore it is critical to gain confidence that the project plan is thorough and has enough risk assessment to avoid missing the project completion date.

Project Kickoff Meeting Date:

This is the date the Project Managers and the Customer/Sponsor agree to kick off the project and begin executing against the project plan.

It doesn't matter what tools you use to manage your project plans. What matters is that they contain the level of detail needed to maintain control of the project process (usually task, duration, work, start, finish, precedent, and resources needed), are easily updateable, and communicate realistic tasks and durations.

Project Planning: Specific Requirements & General Rules

Project planning within the Think Rapid Control Process is flexible, has a few specific requirements, and follows several general rules.

Specific Requirements:

All Projects must have a project plan in some form. The project plan must specify tasks, duration, work effort, and resources, at a minimum.

- Tasks must be action oriented in such a way that the resource tasked understands exactly, the deliverable that must be produced in order to complete the task.

- The time required to complete the task or produce the deliverable must be articulated in both duration and work so that the resources, over the entire plan, can be aggregated (preferably in a resource table).

- Both the aggregated and task specific resources must be reviewable so that overall levels of resources can be tested and confirmed and individual resources can be assigned and scheduled reasonably.

General Rules:

- Tasking should be tracked in chunks no greater than 5 days, but preferably no greater than every 2 days, either as task complete or percent complete. A great deal of effort must go into maintaining project status. Really, task duration depends on how resources are linked to it. If a single person is responsible for a task that lasts two weeks and that's all they are working on, and it cannot be chunked further to measure progress, then it can be allowed, but caution should be used.

- The project plan must remain achievable. You must not allow tasks to go un-completed without documenting them and adjusting the plan to accommodate (either through re-planning or use of slack). You must have a manageable way to keep them under control; usually, this involves properly vetting and snaking with all parties. Minor interruptions might be OK, but they may snowball, or worse, develop as blind spots in your planning. Project plans must reflect real word as much as planned world.

- Schedule risk mitigation, sometimes called contingency, should be allocated to those tasks deemed riskiest. It should not be considered a slush fund that can be consumed by any task that is running long. There is no way to accurately predict down-stream impact otherwise and poorly applied contingency is a sign of a project plan that is not well thought out.

- "Everyone, review this," is not a reliable strategy for communicating task expectations or for learning of potential issues. The PM is likely to be the only individual that can consume all of the detail in a good project plan. If

you want good feedback and team awareness, then tasking may need to be broken-out per individual. You should ask (Snaking principle):

    a.   Can you get this finished as planned?

    b.   Do you know of anything you need in order to accomplish this and can I help you get it?

    c.   What is the worst thing that could happen that would prevent you from finishing (apply Pre-Mortem principle)?

- Visibility is required to make your plans anti-fragile. Print them and post them frequently (weekly at least). Require that team members and stakeholders review them. Include a pdf version with every project report. The more visibility a plan has, the better accountability experienced in projects. If everyone knows what is expected by them, their role, deadlines, and deliverables, they are more prone to own them and report possible expected slippages.

- Task descriptions must be action-oriented. Reading a task name should invoke a call to action that is clear and descriptive. Use action verbs like develop, review, test, assign, etc.

- Use task preambles and color coding to enable rapid scanning of plan tasks. Preambles often include abbreviations like: MTG: meeting, DLVR: deliverable, CUST: customer task, APRVL: approval
  Ex: MTG: Conduct kickoff meeting at customer facility

Project Reporting: General Rules

1. A Weekly Status Report (WSR) is a critical tool for project managers. There are hundreds of "correct" formats for WSRs. The key to a WSR is that it communicates what is important and that it is easy and accurate to maintain. It doesn't matter if the report is maintained in Word, Excel or in a central database. What matters is that they are effective for the project.

2. Many WSR templates are pushed down to PMs from a PMO and are rarely focused solely on enabling a project manager to control their projects; they typically place additional burden on PMs so the PMO can report information that is important to the PMO. PMs should test WSR templates to make sure they are simple, direct and effective, and that they do not cause undue burden on running the project effectively.

3. Here are a list of fields that we often find are needed in a WSR:

Field	Description
Project Name	Easily recognizable name
Status as of	Date (mm/dd/yy)
Begin	Project inception date (mm/dd/yy)
Projected Completion	Date (mm/dd/yy)

Active Phase	Discovery & Immersion, Planning, Validation & Risk Mitigation, Kick Off, Active Mgmt & Cntrl, Close Out
Executive Sponsor	Executive (e.g., CFO) name
Project Sponsor	Technical (e.g., CTO/CSO) name
Project Manager	Strategic PM / Tactical PM name(s)
Executive Update	Monthly high-level accomplishments and major activity forecast
	Profit/Loss statement; cost projection
	Schedule tracking and projection
Overall Health	Color-based health indicator – green, yellow, red, hold (red diagonal lines)
Team Update	Color-based health indicator + Weekly update used to provide status to sponsors, stakeholders, and team members
Major Milestone Updates* (repeat as needed)	Color-based health indicator + Milestone Name + Date range (MM/DD to MM/DD) + Status description

Current Risk Items*	Quick reference ID + Risk/Impact Description + Mitigation Action + Back-up Plan + Owner + Color-based impact rating (L, M, H)+ Color-based risk rating (L, M, H) +
Current Action Items*	Quick reference ID + Created date + Description + Actions Taken Log + Owner + Status (New, In Prog, Closed)
Out of Scope / Parking Lot	Quick reference ID + Created date + Description
Change Control Register	Quick reference ID + Classification (budget, time, features, risk) Description and impact on project Requested by + date (mm/dd/yy) Approved by + date (mm/dd/yy)

Completed items are moved to archive one cycle after being reported as complete

Weekly Status Report Template Example

Project Name				Status as of:	mm/dd/yy
Begin:	mm/dd/yy		Executive Sponsor:		
Projected Completion:	mm/dd/yy		Project Sponsor:		
Active Phase:	Select...		Project Manager:		

Executive Update — Overall Health:
Monthly high-level accomplishments and major activity forecast

Health	Team Update	
?	Weekly update used to provide status to sponsors, stakeholders, and team members.	

	Major Milestone Updates	
?	Milestone 1 (MM/DD to MM/DD)	
?	Milestone 2 (MM/DD to MM/DD)	
?	Milestone 3 (MM/DD to MM/DD)	

Current Risk Items

ID	Risk/Impact Description	Mitigation Action	Back-up Plan	Owner	Impact / Risk	
					?	?
					?	?
					?	?

Currrent Action Items

ID	Date	Description	Actions Taken	Owner	Status
	mm/dd				?
	mm/dd				?

Out of Scope / Parking Lot

ID	Date	Description
	mm/dd	

Change Control Register

ID	Classification	Description	Request/Approval	
	?		Requested by:	mm/dd/yy
			Approved by:	mm/dd/yy

Large or Small Data Projects –
Application Differences in the RCP

Think's projects vary in size. All are required to stay in a state control through to completion. For all projects, we still use the same Rapid Control Process and principles regardless of size and scale. The principles accentuated may change and skill level required in "big data" projects may require more participation by the Strategic Project Manager, but the projects include the same basic components. Here are some ways in which variation may occur:

Planning will likely take longer in larger projects. Using the chunking, plan for a plan, and forward motion principles, the PM will break down a large project or program into smaller, more manageable micro-projects. These are sequenced, cascaded, or overlapped to accomplish the outcome of the project by properly managing the triple constraints to account for resource constriction. Since the PM role is a stated project resource, very large projects may require multiple project managers to "own" several micro-projects each. In these types of projects, managing against the triple constraints, especially elements balanced against resources become key.

Big data can require more involvement by the Strategic Project Manager. Small data projects are generally more tactical with localized chunks, deliverables, and immediate and attainable goals. Large data projects often require more attention to the more strategic impact on the overall corporate entity and may require longer-term, sometimes phased planning. Typically, the

Strategic Project Manager is required to play a larger role for a longer period of time.

Big Data projects are likely to involve "Super Processes" that are not normally part of smaller projects. Super Processes may involve optimization, organization-wide communications, strategic impact analysis, or cultural elements. This means that project plans must consider and plan for more than the standard software development lifecycle processes, typical of smaller data projects. Big Data projects are less insulated from executive level scrutiny, although that does not release the PM of proper management at the smaller level. In Big Data projects, the intense rigor and scrutiny of executive review must be considered as well as the political impacts on all aspects of planning.

Note: Even small projects can suffer from hidden objectives… insulated until the project emerges within the company, then others impacted by the project begin to add requirements (changes to the project.)

Some of our best control refinement occurs on the big data projects that we undertake. New practices filter through everything we do as a team in projects of all sizes. Sizing our Project Management effort properly, using the RCP, is critical to our ability to manage projects of all sizes routinely.

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Squaring Agile with Project Management to Maintain Control

The Agile movement is not anti-methodology, in fact many of us want to restore credibility to the word methodology. We want to restore a balance. We embrace modeling, but not in order to file some diagram in a dusty corporate repository. We embrace documentation, but not hundreds of pages of never-maintained and rarely-used tomes. We plan, but recognize the limits of planning in a turbulent environment.

— Jim Highsmith, History: The Agile Manifesto

Agile is a philosophy that embodies many development methodologies. Our project management methodology is very well suited for managing Agile projects. Both are meant to be simple, direct and effective; however, there are some very important things to remember about managing Agile projects:

Scrum masters are NOT project managers. Scrum masters exist to serve as local scrum process experts, remove impediments to team productivity and to develop high-performing teams. When viewed through the principle of the three-sided table, scrum masters are on the side of the table with the fulfillment team and, as such, are already co-opted and would have a very difficult time also serving as a project manager. Scrum masters should be skilled at all of the engineering and team management dynamics that are required to make a good product. Their attention to detail should be focused on engineering process and challenges.

Product Owners (Chief / Big / Small) are NOT project managers. Product owners are executives with product vision. They understand their business, are responsible for product features and capabilities and work closely with scrum development teams to help with design decisions made during each sprint. They are responsible for ROI, developing product roadmaps, and managing stakeholders. They create financial forecasts, track product performance, write user stories, attend scrum meetings and are responsible for the execution of all tactical duties on the project.

Product Owners are often assigned the duties of project management; however, whoever thought that one person could possibly be able to cognitively frame-shift well enough to do all of these things properly and at the same time was sadly mistaken (except possibly on projects with the tiniest of scope). It is nearly impossible to own the project process, transparent communication to all stakeholders, the technical solution, the technical resources, the outcome and executive options, all at the same time. There are simply too many overlapping details and competing priorities not to take shortcuts or make flawed assumptions. Senior executives often mistakenly assume that a product owner and scrum master will have the wherewithal to drive a team to a technical solution and manage the project at the same time. It's an understandable mistake; it is one of the promises of the Agile development process.

The issue is that Agile has made the lead executive on the project, the product owner, responsible for all project management activities and said you don't a project manager.

On Agile projects, a project manager should operate as an extension of the product owner. They become their top lieutenant, trusted collaborator and clear the road of much of the administrivia that would otherwise occupy their time. As the top lieutenant, the project manager must be able to operate at an executive level (strategic) and also be a high performer at tactical and perhaps even project coordinator levels.

The scrum process does not officially recognize the role of the project manager because of fear of command and control difficulties, should the project manager also have people management responsibilities. This is no excuse for not having project management over an Agile project. A PM, using the Three-Sided Table principle, will always separate people and project management responsibilities. Fear of allowing the PM to make decisions that should be made by the product owner is also a false distraction. A PMs role is not to make product decisions. It is to maintain situational awareness, see around corners and make sure that risks are mitigated with good executive options. Tracking progress, compiling project data, managing the more frequent but less impactful operating decisions is where the project manager should be focused while operating at a tactical level.

Daily scrum meetings are often viewed as a method for providing minor course corrections and risk mitigation steps that keep a project on track, in other words, an alternate form of project management. The truth is that the amount of real project management that occurs at a daily scrum is but a fraction of what a professional project manager performs. Again, this represents a total collapse of the Three-Sided Table and is

accompanied by all of the issues likely to occur if a project manager is co-opted to the fulfillment team side of the table. Daily scrums should focus on the collaborative creation of high-quality code and capabilities, not on project management. To the extent that the product owner needs to collect or convey information in order to properly guide the project, the project manager might participate, but most of that type of activity should occur at a different time.

Agile projects minimize accountability. They shouldn't, but it is important to recognize that the promise of Agile effectiveness has somehow been used to rationalize a loss of accountability for project issues or improper planning. Surprisingly, this holds true for almost everyone, from business executives to Agile team members. Teams are taught to provide transparent communications during sprint reviews; however, objective commitments that were made and not achieved are simply footnotes that place the objective back in the product backlog stack to be worked on during the next sprint. Slips and delays are often seen as a necessary part of an Agile development effort and are rarely resisted, until too late.

Sprint Review and Retrospective steps focus on demonstration of work completed and team continuous process improvement. Project management activities in these critical stages are conspicuously under-represented. Downstream impact on resources, delivery date adjustments for product capability releases, impact on project P&L, and schedule impact caused by continuous process improvement are but a few things that may not be adequately considered for overall project planning purposes.

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PMs make Agile teams better. They enable team members to focus on what they are good at and manage the rest of the project for them. PMs are able to maintain a project-level perspective that is important to the overall health of the project and to the outcome/product owner. PMs layer accountability back into the Agile development process, which is obviously resisted by most scrum masters and Agile teams, but it is NOT their role to become an enforcer. They are there to help. They bring and maintain the proper project-level perspective needed to manage an Agile project over the long-term. They also help Agile team members chunk-down sprint objectives into measurable actionable tasking. Again, the measurable aspect is often resisted, but if you cannot measure progress, how can you predict finishing on time or on budget? Measurable, for a PM, is something that can be tracked in increments of no more than 5 days, but often preferably only 2 days. It is simply unacceptable to have a 3-4 week sprint and not know where you are until sprint review.

PMs are able to help identify long-term planning steps/durations and help identify opportunities for interventions when things are moving exceeding well or not as well as hoped. Often in large Agile development efforts the accumulation of objective capabilities result in more QA and regression testing than is intuitively predictable. PMs track and provide data that can be used to provide trend analysis that can help product owners predict project completion more accurately. The PM also has the responsibility to report any project accelerations or delays to the outcome/product owner and to do so with pre-thought executive options that can be implemented if needed.

PMs should be involved in Agile projects from inception to completion. They will need to be a part of all planning and review stages and may need to be a part of daily scrums during critical project phases or when a project is not going well. The PM will also need to periodically collect feedback on progress made during a planned period, but should not interrupt daily scrum meetings for such information. All interactions with Agile team members should be as simple, direct and efficient as possible and strive to provide value to the Agile team member. Questions like, "What can I do to help you meet completion of your objective," and "Do you need help in breaking this down into actionable tasking," should often be asked. A PM should be seen as a value-added enabler to an Agile project, not a bureaucratic administrator. If an Agile project is complex enough to require a scrum of scrums, the project manager should always be a part of them.

Conflict Resolution

There is always a reason when a conflict arises. If it is necessary to resolve the conflict, you may need to consider an array of strategies to decide on the correct one and act. This simple aid can provide you with a short-hand method that drives you to ask the right questions and develop the most advantageous strategy possible. For additional detail, reference Bare Knuckled Project Management, Chapter 7.

Recognizing Reasons for Conflict

- Ambiguity
- Accountability (or lack thereof)
- Incompatible Goals
- Unbalanced Cost/Reward
- Mean, Evil, Nasty People

Planning for Conflict

1. Know and understand the situation from multiple points of view
   a. Some people reflexively avoid conflict; others go straight to DEFCON One
   b. Try to expand timeframe so you can consider things properly
2. Determine your desired outcome
3. Strategize specific behaviors and actions needed

BKPM Principle: *Access Portals*

Conflict almost always provides an opportunity to create an Access Portal. When you address conflict and analyze possible outcomes, you have an opportunity to pre-empt emotional responses from those who are in conflict and establish some plans for addressing the reasons of conflict before they trigger emotional responses. When you do this and once people are triggered, you'll already have laid a path forward. You look like you have a crystal ball and have seen the future. This is a very powerful tool for a project manager.
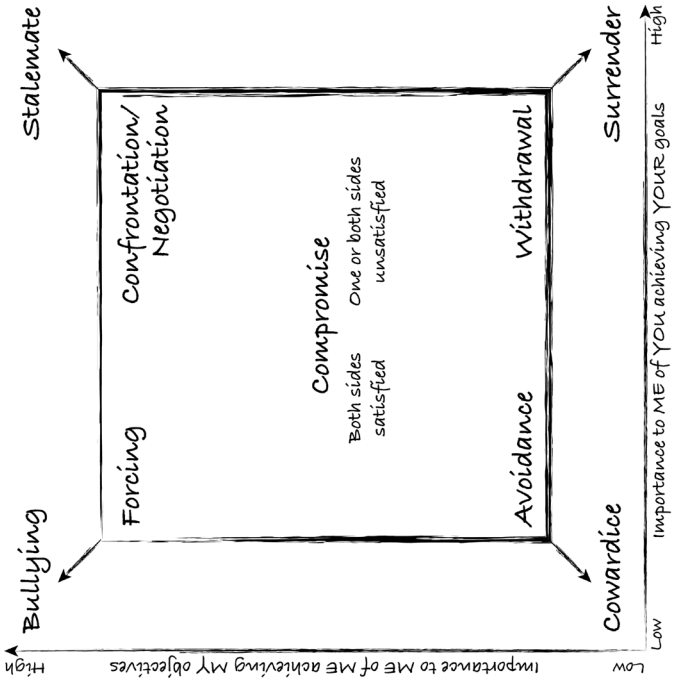

Bare-Knuckled Project Manager
Architect and manager of the plan and process

think

Developing an Access Portal is a nuanced technique that gets easier and more front-of-mind over time. Here is a simplified process for establishing an Access Portal:

1. **Recognize potential future conflict**
   You intuition as a PM will tell you this.
2. **Understand impact from all points of view**
   What are the goals and objectives of those in conflict and why are they misaligned?
3. **Envision a mitigating process or action**
   Can you negotiate a solution or is a direct confrontation needed? Is a face-to-face meeting necessary? Is a meeting in front of a manager necessary? What is your strategy?
4. **Setup appropriate cause and effect**
   Cause and effect should be considered from all angles. When x says or does something, what can I put in place to trigger a process-driven path to a solution? Process is easier to get agreement on than a solution. Example: Person x will not commit to a delivery date until person y provides needed information. Process: person x will halt all development, teams will collaborate until needed information is provided, then development will resume.
   NOTE: These process solutions must be presented and agreed to by all concerned before forcing a meeting; too late once emotions are engaged.
5. **Implement strategy / response**
   - Meeting / Communication
   - Accountability
   - Contract / Third-Party

The BKPM Conflict Resolution Model

Stalemate

Confrontation/Negotiation

Forcing

Compromise
Both sides satisfied
One or both sides unsatisfied

Withdrawal

Avoidance

Surrender

Cowardice

Bullying

High ← Importance to ME of ME achieving MY objectives → Low

Low → Importance to ME of YOU achieving YOUR goals → High

If...	My need to achieve my objective is...	My need for you to achieve your objective is...	Choose the conflict response...
	Low	Low	Avoidance
	Low	High	Withdrawal
	Medium	Medium	Compromise
	High	Low	Forcing
	High	High	Confrontation/Negotiation

Using Principles for New Options for Action

PM principles and techniques are designed to help you make the right decisions while managing a project. You can have the best process in the world, but you also need to be sensitive to project conditions and you need to make the right decisions in order to execute.

PM principles and techniques provide an alternate point of view from which you can evaluate your current state. Adopting this new point of view can unlock new options for action. Not all principles apply to every situation, so the challenge is in finding the right principle for your current situation; remember there may be several.

Examples:

- You have a new project and you're trying to get your arms around it, but it just seems too amorphous and has too many unknowns. **Chunking** might help, so might **Enumeration without Fear**.
- You've identified a risk but don't have a perfect way to mitigate it. At best you have a pretty good idea how to react if it does happen. Better consider developing an **Access Portal**.
- No one agrees how to get going and everyone keeps suggesting more analysis to attempt to identify a solution. Don't get frustrated. **Forward Motion** is the principle you are look for and you may need to implement **Momentum over Analysis**.

PM Principles and Techniques

Of all of the principles in this guide, the concept of managing project as if the PM is sitting at a Three-Sided Table is one of the most fundamental. Almost everything else is designed to maintain this relationship between project owners and fulfillment teams.

No project manager, not even the most highly skilled, can do it alone. Executive leadership sets the tone and provides the support; project sponsors establish the goals; the solutions team partners to do the work; and the project manager runs the plan and process. Establishing clear goals, roles, and expectations for the different project players is a necessary precondition for the PM.

Bare-Knuckled Project Manager
Architect and manager of the plan and process
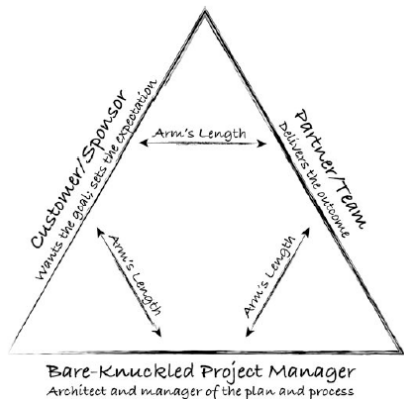
The following table provides a list of established PM principles and techniques, but it doesn't need to stop here. If you find something that works well for you, add your own to this list and use it to become a better PM.

PM Principle	Description
Access (Escape) Portals	A strategy the PM builds into the plan to allow bridging the gap with the customer when conflict and problems arise. Access Portals include agreeing about areas of relative flexibility, agreeing about responses to foreseeable risks, agreeing about approaches to unforeseeable risks and issues, and agreeing about processes for conflict resolution.
Anti-fragile	This principle applies to many things but very often to project plans and risk mitigation strategies. It is a process by which you intentionally expose your intensions to outside stressors in order to see if they hold up under new pressure or scrutiny. Whenever you have plans that are solid and buttoned up, then make them Anti-fragile.
Change Management	A process by which changes are negotiated or accepted as fact, are documented, and are rolled into outcome modification, project planning, and risk management.

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PM Principle	Description
Chunking	If any process step is too large to accurately track progress, individual responsibility, external variables that may impact it, or variables that it may introduce to other process steps, it must be broken down. Chunking is the process by which a PM continually breaks-down project components into actionable pieces, even if the action is to break it down further.
Conflict Resolution	A thoughtful process in which you first identify your goals in order establish a strategy for resolving the conflict. A PM doesn't have to fight every battle, but is unafraid and will move forward with purpose if a battle is warranted.
Co-opt Risk	What happens when the Three-Sided Table breaks down and the project manager becomes aligned with one of the remaining two sides.
Enumerate without Fear	Create a punch list. Free yourself from worrying about priority, order, or importance and simply list everything that you can think of that needs to be dealt with. Any item, large or small, can be added to a punch list. Once the punch list is established, every item can be broken down and planned.

PM Principle	Description
Executive Options	Risk mitigation and project control that exceeds the general ability of a PM. These options empower executives to work within the triple constraint model to enable large investment/authority changes that provide PM with new options. Executive Options generally result in Access Portals once properly Snaked.
Forced Clarification	The process by which the PM ensures that the customer or sponsor defines the outcome, a necessary precondition to moving forward with the project.
Forced Conflict	A purposeful situation where the PM sets up a direct conflict to force a resolution to an imminent process incompatibility or risk.
Forward Motion	A PM is committed to moving forward constantly, even when goals aren't clear (which is most of time).
Guard Rails	This describes what we do to set up and pattern of execution that is pre-programmed. Example: The control phase of the RCP sets a weekly meeting and Agenda and commits to it through the course of a project. That series of committed executions, and others like it, we call Guard Rails.

PM Principle	Description
G-R-E-A-T	An acronym for team building, which works best when people are clear about goals, roles, expectations, attitudes and aptitudes, and time.
Iterative Approach	When the outcome isn't clear up front, the project may go through cycles and multiple prototypes to gain increasing clarity and understanding. May be part of an agile process.
Land Mines	Land minds are numerous individual actions put in place to force forward momentum or keep action within a particular vector. Usually, land minds result in a negative outcome if hit and, therefore provide negative reinforcement.
Mistake Management	A process that provides a framework and directives for dealing with mistakes before they spiral out of control. It must be addressed without fear of confrontation, but also with the understanding that mistakes are rarely intentional. Look for root causes and build checks and balances to minimize the likelihood of additional mistakes.
Momentum over Analysis	A strategy used to make the project move forward regardless of unknowns. If mired down in analysis, build small achievable steps to force forward progress.

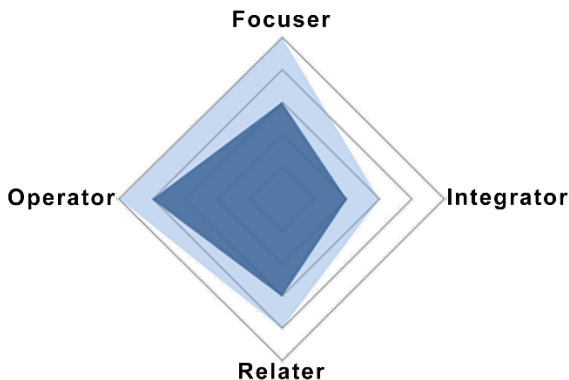| PM Principle	Description
Pre-Mortem	During plan review and snaking, ask task owners to conduct a pre-mortem that creatively projects absolute worst-case scenarios. Examples: hit by a bus, down with the flu, disaster power outage, test environment equipment failure, business fails regulatory check, etc.
Recovering Value	The PM alternative to ineffective "lessons learned," a strategy to extract value from the project experience and results to benefit the organization and future projects.
Risk Management	A six-step approach to managing recognized risks that results in contingency planning and/or communication (access portal development).
Shredders	These are barriers to project success. Unlike normal barriers that can be overcome at the PM level, shredders are cultural barriers in your organization that may only be overcome by applying constant pressure at the corporate level.
Simplicity	The best approach to any activity is simple, direct, and effective. Elaborate planning introduces variables and risks that cannot be tracked and managed without expending a lot of energy.

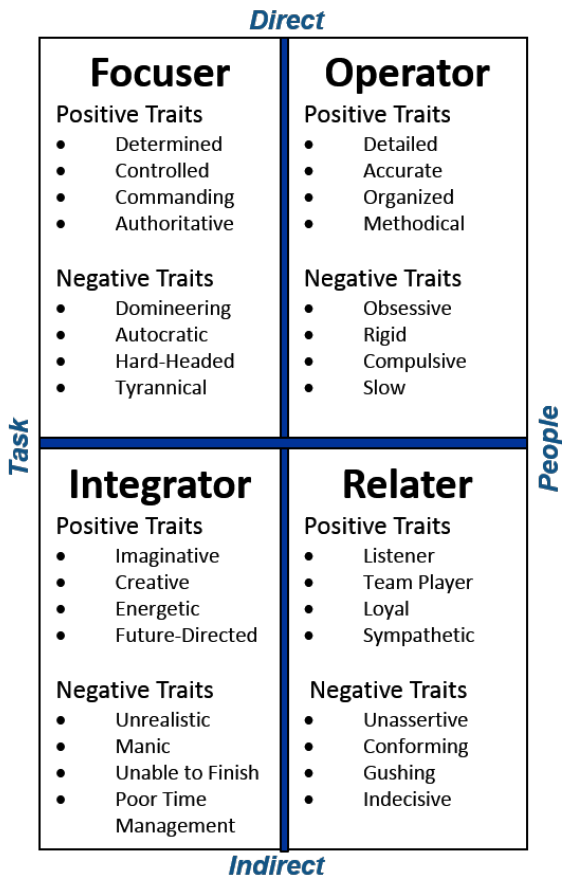| PM Principle	Description
SMART+ER	An acronym for a set of standards used to validate and measure project outcomes. (Specific, Measurable, Agreed to, Realistic, Time-constrained, plus Ethical and Rewarded.
Snaking	The process of weaving back through everyone who has a role in plan tasking to make sure they have had a chance to provide a risk evaluation, personal commitment to deliverables and dates, and general awareness of task dependencies. (Attributed to a Chevron CPDEP concept)
Spectrum Analysis	A thought process step in which you challenge your instinctive perception of a risk, constraint, or possible solution. Slow down and think best case, worst case and what could possibly go wrong to invalidate your assumptions of the situation.
Strategic Marketing	Just getting things done isn't always enough. Sometimes a PM must strategically market or communicate plans and accomplishments in order to maintain momentum and drop barriers to implementation of planned activities.

PM Principle	Description
Tempo	"I think fast, talk fast, and I need you to act fast..." -- Winston Wolfe. We use tempo as one technique to establish control in a project, whether intentional or not. Thinking fast and moving fast for a client makes it easier for them to contribute and they appreciate the sense of urgency
Three-Sided Table	A PM approach to project management in which the PM owns the process (but not the outcome), the sponsor or customer owns the outcome (but not the process), and the partners and team own the technical solution.
Time Slicing	A method used to enable cognitive frame shifting while serving as project coordinator, tactical PM and strategic PM
Triple Constraint	The traditional set of constraints that shapes the world of any project, consisting of the time constraint, the cost (or resources) constraint, and the mandatory performance criteria, ranked in order of flexibility and driver, middle constraint and weak constraint.
Unafraid of Conflict and Confrontation	A core competency of a PM that results in proactive responses to unknown, risk resolution and planning, and communication.

Personality Traits of a PM

PMs have a set of personality traits that describe them at their very core. The ideal PM, our PM Archetype, is highly operationally disciplined, focused on the project management process and the team, only slightly concerned with maintaining personal relationships, and not very concerned with getting into the creative aspects of developing options for technical solutions.

This chart represents the natural resting state of an ideal Bare Knuckled Project Manager. The darker area in the center is their natural resting state; however, everyone can expand their zone in time of heightened awareness. A Strategic PM's zone expands to be even larger, but similar.

Focuser

Operator   **Integrator**

Relater

Direct

Task

People

Focuser

Positive Traits
- Determined
- Controlled
- Commanding
- Authoritative

Negative Traits
- Domineering
- Autocratic
- Hard-Headed
- Tyrannical

Operator

Positive Traits
- Detailed
- Accurate
- Organized
- Methodical

Negative Traits
- Obsessive
- Rigid
- Compulsive
- Slow

Integrator

Positive Traits
- Imaginative
- Creative
- Energetic
- Future-Directed

Negative Traits
- Unrealistic
- Manic
- Unable to Finish
- Poor Time Management

Relater

Positive Traits
- Listener
- Team Player
- Loyal
- Sympathetic

Negative Traits
- Unassertive
- Conforming
- Gushing
- Indecisive

Indirect

Operating Within the PM Zone
Not everyone's natural preferences and personality traits match our PM Archetype. When projects are running well and you are not experiencing stress, most PMs can force themselves to operate in the PM zone.
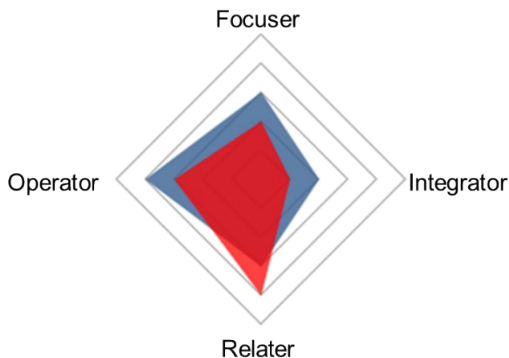
If your natural resting state zone differs from the archetype, you will need to **recognize** when you're operating outside of the zone and **expend energy** to get back into it. Use **PM Principles** to get control.

Working with our Customers' PMO

Many PMOs come into existence by executive action. Their director enforces standardized processes and templates in order to provide "best practices" with the goal of enhancing project success. We embrace good practices and work willingly with our customers' PMO.

For most PMO's however, limiting their involvement to just providing best practices is seldom the case. Often the largest PMO mistake manifests itself in the form of governance. Every breakdown or failure results in a new governance rule or process and, in no time at all, the concept of effectiveness has been destroyed by a bureaucracy. Each rule or process can arguably make sense in isolation, but the compendium of many rules and processes soon becomes burdensome. It has been Think's experience that this type of top-down, governance-driven, PMO needs to be refocused on effectiveness or run the risk of becoming irrelevant to the organization and people it is there to serve. Therefore, we intentionally distance ourselves, to the extent possible from the customer PMO.

For Think to be successful, we want project success first; everything else follows. We believe that the best measure of PMO effectiveness is this, "If an organization's PMO was zapped out of existence, would the practices implemented by the PMO endure?" If the answer is something like, "Well I'm not going to use that template anymore" or "At least now I don't have to create those time-consuming reports anymore," then something went wrong somewhere.

Many times PMOs are established for good business reasons, but then implement practices that do not directly aid project management success and, in fact, make it even harder to successfully manage a project. We limit our commitments to the customer to those practices which add value to our implementation and facilitate success.

PMO meetings, resource utilization reports, one-size-fits-all standardized process, project inception documentation, approval processes, etc. all take time away from the simple, direct and effective way in which PMs need to manage projects. Not that these things are bad; we need to provide those artifacts and adhere to those processes and practices which make the most sense to our implementation and make our work effective. Sometimes this means doing something that is already being done differently, doing something altogether new, and surprisingly often with mature PMOs, killing specific practices that do not enhance PM effectiveness and succeeding in the outcome of our projects.

Every organization is unique. The measure of "effectiveness" considers many things that other PMO models do not consider. Things like organizational culture, tempo, project types, internal PM skill levels, etc. We must be aware of these and consider them in the context of our projects.