

- Accountability:
  - project manager, 8
  - responsibility-accountability map, 137–139
- Accounting close, 184
- Act (P-D-C-A cycle), 182–183
- Activities:
  - in project stages (project flow diagram), 6
  - work assignments broken into, 86, 89
- Adjourning/transforming stage, team life cycle, 205
- Appendices to Project Charter, 122
- Application-specific competence, project manager and, 19–20, 194
- Approvals, in Project Charter, 117–118. *See also* Sign-offs
- Archiving project documentation, 184
- As-is analysis, 58, 75, 78, 80
- Aspirations, stakeholder, 201
- Assumptions, project, 72–73, 119
- Authority/responsibility, project manager and, 8
  
- Baseline plan/budget, 22, 98, 149
- Baum, Stephen H. (Vignette 5), 124–125
- Benchmarks, time estimates and, 140
- Beta curve distributions, 88, 146
- Blogs, 184–185
- Blue Chip program, 27
- Brainstorming, 122
- Budget. *See also* Cost(s):
  - baseline, 22, 98, 149
  - estimates, early in project:
    - best case scenario of 30 percent range, 21
    - WAGs (Wild A%# Guesses), business case figures, 36, 41
  - issues, in vignette, 125
  - preliminary, in Project Charter, 122, 130
  - project manager role and, 7, 8
  - in sign-off package, 157
  - status reporting, 170–176
- Burn rate, 171
- Business Case:
  - bypassing/exceptions, 45–46, 52–53
  - clarity, level of (versus later stages), 61
  - developing, 32–42, 46
    - contents, 32–33
    - cost benefit analysis, 40–41
    - goals and benefits, 34
    - issue or problem to be addressed/solved, 33
    - needs and wants, 34–36, 216
    - objectives, 34
    - outline, 45
    - preliminary project scope, 36–38
    - return on investment analysis (ROI), 42
    - risk and impact, 38–40
  - examples of projects that would fail a Business Case analysis, 49–50
  - function/benefits of, 30–32, 36
  - investigator (versus “project manager”), 33
  - overview/introduction, 6

- Business Case (*continued*)
- Project Charter and, 63, 118–122
  - project manager's need for, 32
  - rating effective of, 102
  - requirements and, 36
  - strategic alignment and, 43–44
  - validating/reviewing, 60
  - Vignette 3 (Why Go to the Trouble of Developing a Business Case?—White Paper: An Alternative to the Business Case, by Neville Turbit), 47–56
  - weeding-out function, 30, 31–31
- Business context (position), 15
- Business-related risks, 121
- Business Systems Analysis and Design (BSA&D), 19, 78
- Calendar duration/Gantt Chart, 21, 57, 82, 93–98, 101, 149
- Cash needs analysis, pro forma, 171
- Celebrations, end-of-project, 183
- Change(s), market/business, 7
- Change(s), project:
- Change Control Log, 100, 101
  - Change Control Mechanism, 21, 59
  - change management plan, 150, 157
  - change requests/orders, 6, 177, 178, 180–181
  - Change Review Board, 177
  - cost of, 98
  - Project Management Life Cycle (PMLC) and, 18
  - status reporting, 162, 176–178
  - Work Breakdown Structure (WBS) and network, 92–93
- Check (P-D-C-A cycle), 182–183
- Cheerleader, project manager as, 8
- Client, defined, 4, 113. *See also* Stakeholder(s)
- Close, project (Stage 4), 6–7, 59, 102–103, 183–184, 205
- College:
- Vignette 2 (Project Management, an Undergraduate's Best Friend, by Elaine Delos Reyes), 26–27
  - Vignette 4 (Putting the Project Life Cycle to Work in Higher Education, by Lillian O'Reilly), 104–107
- Communication. *See also* Status reporting:
- Elevator report, 162–170
  - Individual Communication Plan, 197–202, 236–237
  - mechanisms, 162–163
  - operating communications plan, 150, 153–156
  - plan, 150–157
  - Project Charter, articulated in, 121–122
  - project manager role, 7, 8, 9
  - project manager skills, 190–191
  - project sign-off, 157
  - quality plan, 156–157
  - risk analysis and contingency plans, 156
  - Strategic communication plan, 150–155, 162, 228–229
- tools:
- FAQ list, 151–152
  - Gantt Chart, 96 (*see also* Gantt Chart)
  - Project Context Diagram, 25
  - Project Estimating Funnel, 41–42
  - quick shift list, 151
  - virtual filing cabinet, 152
- Communication style, stakeholder, 201
- Completion. *See* Close, project (Stage 4)
- Complex projects, 109
- Conceptualizing (Stage 1), 6, 29–56
- beginning the process, 29–31
  - Business Case, 6, 30, 32–42 (*see also* Business Case)

- overview in project flow diagram, 6
- project context, 24–25, 37–38, 45, 215
- strategic alignment, 43–46
- Vignette 3 (Why Go to the Trouble of Developing a Business Case?: An Alternative to the Business Case, by Neville Turbit), 47–56
- Consistency, project manager and, 193
- Constraints, project, 65, 73–74, 120
- Context:
  - agnostic (power of PMLC), 25
  - project, 24–25, 37–38, 45, 215
- Contracts close, 184
- Cost(s). *See also* Budget:
  - in Business Case, cost benefit analysis, 40–41
  - direct/indirect, 172
  - estimating methods, 40–41
  - Gantt Chart and, 94
  - historical information about, 40–41
  - humorous anecdote (“Foveaux Forecasting System”), 47–48
  - labor costs, 172
  - labor productivity and efficiency ratios, 94–98
  - Needs and Wants figures, 34–36, 41, 216
  - Project Estimating Funnel, 41–42
  - in project management triangle (project drivers), 22–23
  - of quality, 156
  - refining estimates, 142
  - sponsor/stakeholder early demand for, 41
  - status reporting, 174, 175
  - tasks and (in WBS), 92
  - WAGs (Wild A%# Guesses), business case figures, 36, 41
- Cost Spreadsheet, 21, 82
- Cost variance (CV) and cost variance index (CVI), 175
- Critical path analysis, 90–93, 144, 145, 148, 149
- Critical Success Factors (CSFs), 65, 70–71, 119
- Critical Success Measures (CSMs), 65, 71, 119
- Dashboards, 184–185
- Dates, project:
  - earliest finish date (EF), 147
  - earliest start date (ES), 147
  - latest finish date (LF), 147
  - latest start date (LS), 147
- Decommission, 120
- Definition of terms, 3–4
- Delegating role/skills, 7, 8, 193
- Deliverables:
  - breaking into smaller units or subprojects, 134
  - Business Case as first, 6, 30 (*see also* Business Case)
  - end-product, 133
  - excluding, 137
  - intangible, 12
  - interim, 133, 137
  - internal/external, conducting Project Close by, 102
  - ownership levels:
    - assists, 137
    - communications/FYI only, 137
    - participates, 137
    - responsible, 137, 138
    - sign-off, 137
  - by stage of project (overview diagram, project flow), 6
- Tasks Lists for producing, 139–140
- Work Breakdown Schedule organized by, 84
- Work Breakdown Schedule as tool for identifying, 133–134
- Dell, Michael, 49
- Delphi technique, 122–123

- Deming, Edward, 182
- Dependency analysis, 90–91, 141  
 finish to finish, 141  
 finish to start, 141  
 start to start, 141
- Disruptions, project, 162, 178–182  
 addressing, 179–182  
 mitigating, 179  
 prevention, 179  
 strategies for dealing with risk,  
 179–180  
 suffer it, 179  
 transference, 179
- Distributors: Vignette 1 (The Birth of a  
 Project, by Peter J. McAliney),  
 11–12
- Do (P-D-C-A cycle), 182–183
- Documentation:  
 archiving, 184  
 reading, as planning activity, 78
- Drivers, project  
 (time/cost/requirements), 22–23,  
 74–75, 131, 171
- Earliest finish date (EF), 147
- Earliest start date (ES), 147
- Earned value analysis (EVA), 173–174
- Efficiency ratios, 94–98
- Effort:  
 estimating in, versus duration, 94  
 hours as recommended unit, 90  
 simple formula for task effort,  
 145–146
- Elevator report, 162–170, 172, 185,  
 230–233
- E-mail, 162, 163, 193
- Empathy, project manager and,  
 193–194
- Engineering, sample Work Cycle for, 19
- Estimates/estimating:  
 duration, and critical path, 95–98  
 efficiency ratios, 94–98  
 in effort, 87–88, 96  
 historical information and, 40–41,  
 140  
 hours as recommended unit, 90  
 measuring confidence in, 146  
 most likely estimate, 87  
 most optimistic estimate, 87  
 most pessimistic estimate, 87  
 precision increasing with progression  
 through PMLC, 21–22
- Project Estimating Funnel, 41–42
- task effort formula, 87–88
- 20 hours of effort as Work  
 Assignment maximum, 86
- 27.5 hours of effort in 40-hour week,  
 93
- Work Assignments/activities, 86
- Work Breakdown Structure as as  
 first step, 86–89
- Exclusions, 120
- Executing and Controlling (Stage 3), 6,  
 99–101  
 activities list, typical, 100–101  
 change orders, 6  
 overview in project flow diagram, 6  
 stakeholder analysis and, 195–196  
 (*see also* Stakeholder(s))  
 status reporting (*see* Status  
 reporting)
- Executive abstract, requirements  
 document, 80
- Executive summary, in Project Charter,  
 118
- Expectations, managing, 15, 61, 150,  
 170, 176–177
- Expected time estimate (T), 145
- External risks, 121
- Facilitation, as project manager role, 7,  
 8
- FAQ list, 151–152
- Farmer, Deborah Z. (Vignette 7),  
 186–188
- Finish-to-finish dependency, 141

- Finish-to-start dependency, 141
- Flexibility, project manager and, 194
- Float, 91–93, 147–148, 149
- Flow, project, 6, 17. *See also* Project Management Life Cycle (PMLC)
- Focus meetings, 34
- Follow through, project manager and, 194
- Forced ranking technique, 123
- Forming stage, team life cycle, 203
- “Foveaux Forecasting System” (humorous anecdote), 47–48
- Fry, Art, 49
- Funnel, project estimating, 41–42
- Gantt Chart, 93–98
  - as communication tool, 96–97, 101
  - Cost Spreadsheet derivative of, 21, 84
  - critical path calculation and, 149
  - defined/overview, 21, 57
  - Executing Stage, use of during, 101
  - network turned into, 57, 93
  - in PMLC tool progression, 47–58, 82
  - purpose and uses of, 96
- Gestalt, 89, 100
- Goals, project, 34, 65, 68, 119
- Governmental regulations, and risk/impact, 40
- Granularity, 40, 85, 87, 88, 89
- Hagen, Brian (Vignette 8), 211–212
- Helicopter Approach. *See* Iterative “Helicopter Approach”
- Hierarchical structured teams, 206–207
- Historical information:
  - estimating and, 40–41, 140
  - Project Charter items, 122
- Hours, as recommended unit, 90
- Implementation/integration, project scope and, 120
- Individual Communication Plan, 197–202, 236–237
- Industry life cycle stages, 119
- Innovation, 48–50, 52–53
- Insurance, 179
- Intangible deliverables, 12
- Integrated Project Plan (IPP), 62–64, 98, 102, 218
- Integrity, 192, 195
- Intervention policy, quality standards, 156
- Investigator, Business Case development, 33
- Iterations:
  - critical path and, 92–93
  - Project Charter, 63–64
  - Work Breakdown Structure (WBS), 92–93, 133–137
- Iterative “Helicopter Approach,” 128, 129
  - beginning project (“100,000-foot view”): project flow stages, 5–7
  - diagram, 129
  - 1st iteration (“5,000 feet,” high-level view), 128–133
    - blocking into five to seven high-level steps, 129
    - risk identification chart, 132
  - 2nd iteration (“3,000 feet”), 133–144
    - costs revisited, 142
    - interim and end-product deliverables, 133
    - ordering the tasks (network diagram), 141–142
    - responsibility-accountability map, 137–139
    - risk revisited, 143
    - task lists, 139–140
    - Work Breakdown Structure (WBS), 133–137
  - 3rd iteration (“1,000 feet”), 144–157
    - budget, 149
    - change management plan and communication plan, 150–156
    - Program Evaluation Review Technique (PERT), 144

- Iterative “Helicopter Approach”  
(*continued*)  
  schedule flexibility, determining,  
    147–149  
  time estimates, calculating,  
    145–147
- IT innovation, 50, 52–53
- Java, 49
- Kick-off meetings, 100, 123
- Labor costs, 172
- Labor requirements analysis, 122
- Latest finish date (LF), 147
- Latest start date (LS), 147
- Learning style, stakeholder, 202
- Lessons learned document, 6, 102,  
  184
- Logic diagram, 90–93. *See also*  
  Network diagram
- Manage By Walking Around (MBWA),  
  101
- Management of people-related issues,  
  189–212. *See also* Communication  
  politics, 209–210  
  skills/qualities required in project  
  managers, 190–195  
  stakeholder analysis, 195–202 (*see*  
  *also* Stakeholder(s))  
  team life cycle, 202–206  
  team types, 206–209  
    hierarchical structured teams,  
      206–207  
    matrix structured or project  
      matrix teams, 207, 208  
    skunk works, 207–209  
    tiger teams, 207, 209
- Vignette 8 (The Early Bird Gets the  
  Worm, by Brian Hagen),  
  211–212
- Management reserve, 22
- Managers:  
  discipline-specific (functional) or  
  geographic, 113  
  project (*see* Project managers)  
  senior; role in Project Charter  
    creation/revision (in Vignette 1),  
    12–13  
  as stakeholders (*see* Stakeholder(s))
- Market and business changes, 7
- Marketing, project manager role, 8
- Matrix structured or project matrix  
  teams, 207, 208
- McAliney, Peter J. (Vignette 1), 11–13
- Medical applications group: Vignette 7  
  (The Wisdom in Waiting, by  
  Deborah Z. Farmer), 186–188
- Meetings, 34, 30, 100, 123
- Method 11, 56
- Methodologies, project manager role, 8
- Migration, production, 120
- Milestones, block diagram, 133
- Mission, corporate (defined), 118
- Mission Statement, project, 43, 45, 66,  
  67, 118
- Monitoring and Controlling aspects,  
  communications plan, 150. *See also*  
  Executing and Controlling (Stage  
  3)
- Most likely estimate (Tml), 145
- Motivation, stakeholder, 202
- Name, project, 117
- National Football League (NFL) “Blue  
  Chip” program, 27
- Naysayers, stakeholders as, 75
- Needs and Wants (Business Case),  
  34–36, 41, 68–69, 113, 216
- Negotiating role/skills, 7, 8, 191
- Network diagram:  
  creating, 90–93, 141–142  
  defined, 20, 142

- dependency analysis, 90–91
- examples, 91, 142
- float, 91–93, 147–148, 149
- Gantt Chart developed from, 57, 93–98
- iterations, 92
- in PMLC tool progression, 82
- Precedence Diagrams, 90, 147, 148, 149, 157
- in sign-off package, 157
- Nominal group technique, 123
- Norming stage, team life cycle, 204–205
- Nouns versus verbs, in WBS, 134
- Numbering schema/coding structure, WBS, 85, 135, 136
  
- Objectives, project, 34, 65, 69–70, 71, 119
- Operating communication plan, 150, 153–156, 162
- Opportunity costs, 172
- Optimistic estimate (To), 145
- O'Reilly, Lillian (Vignette 4), 104–107
- Organizational culture, 64
- Organizing, as project manager role, 7, 8
- Outlining rules, 136
- Oval within oval problem solving tool, 182
- Overhead, in 40-hour week, 93
- Owner, defined, 4
- Ownership of deliverables, levels of, 137
  
- Partner-related risks, 121
- P-D-C-A (plan-do-check-act) cycle, 182–183
- People. *See* Management of people-related issues
- Percent complete, 176
- Percent spent, 176
- Percent this project, stakeholder analysis, 201
  
- Performance appraisals, project, 184
- Performing stage, team life cycle, 205
- Personal time, 94
- Persuading, project manager role of, 7, 8
- PERT (Program Evaluation and Review Technique), 88, 90, 144
- Pessimistic estimate (Tp), 145
- Phases. *See* Project stages
- Plan (P-D-C-A cycle), 182–183
- Planned progress, status reporting and, 170–176. *See also* Status reporting
- Planning (Stage 2), 6, 57–63. *See also* Project Charter; Work Breakdown Structure (WBS)
  - As-Is analysis and, 78
  - baseline plan/budget, 22, 98, 149
  - big picture, 57–59
  - Business Case validation, 60
  - cash needs analysis, 171 (*see also* Budget; Cost(s))
  - communication plan, 150–157
    - Individual Communication Plan, 197–202, 236–237
    - operating communications plan, 150, 153–156
    - Strategic communication plan, 150–155, 162, 228–229
  - components/deliverables, 6, 61–62
  - efficiency ratios, 94–98
  - Integrated Project Plan (IPP), 62–64, 98, 102, 218
  - overview in project flow diagram, 6
  - Project Plan, 6, 58, 61
  - quality plan, 156–157
  - requirements analysis, 79–81
  - risk analysis and contingency plans, 156
  - road map diagram, 62, 77
  - schedule:
    - calendar duration/Gantt Chart, 21, 57, 82, 93–98, 101, 149
    - dependency analysis, 90–91

- Planning (Stage 2) (*continued*)  
     float, 91–93, 147–148, 149  
     network, 20, 57, 82, 90–93,  
         141–142, 157  
     stakeholders, sponsors, clients, 75–76  
     team formation, 61  
     Work Breakdown Structure, 57,  
         81–89 (*see also* Work Breakdown  
         Structure (WBS))  
     Work Cycle and, 58  
 PMI's PMBOK, 15  
 Politics, 33, 209–210  
 Post-it notes, 49  
 Post Mortem (Project Close, Stage 4),  
     6–7, 59, 102–103, 183–184, 205  
 Precedence Diagrams, 90, 147, 148,  
     149, 157. *See also* Network diagram  
 Pressure, 24-hour rule for dealing with,  
     193  
 Probabilities, assigning  
     (low/medium/high), 144  
 Problem-Solving Impact Tool, 191–192  
 Problem solving skills, project manager  
     and, 191–192  
 Problem to be addressed/solved,  
     clarifying in Business Case, 33  
 Process, managing, 7  
 Process Flows, 78  
 Productivity:  
     efficiency ratios, 94–98  
     team life cycle and, 206  
     27.5 hours of effort in 40-hour week,  
         93  
 Product/service, defined, 4  
 Professional developmental  
     opportunity, 189–190, 197  
 Professional Project Manager, 19  
 Program Evaluation and Review  
     Technique. *See* PERT (Program  
     Evaluation and Review Technique)  
 Progress reporting. *See* Status  
     reporting  
 Project(s):  
     definition of, 3–4  
     healthy versus unhealthy, 15  
     management (*see* Project  
         management)  
     restructuring, 7–8  
     strategic alignment of, 44  
     weeding out bad ones, 30–31  
 Project Charter, 63–75, 111–123  
     alternative formats, 65, 115, 116, 219  
     appendices to, 122  
     approvals, 117–118  
     assumptions, 72–73, 119  
     budget, 122, 130  
     Business Case and, 63, 116, 118–122  
     “chartering” as verb form, 125  
     communications and reporting,  
         121–122  
     constraints, project, 73–74, 120  
     corporate mission, 118  
     Critical Success Factors (CSFs),  
         70–71, 119  
     Critical Success Measures (CSMs),  
         71, 119  
     drivers (project management  
         triangle), 74–75  
     elements defined, 115–118  
     estimating range benchmark after  
         drafting of, 21  
     examples, We See It Better company,  
         66–76  
     exclusions, 120  
     executive summary, 118  
     goal, project, 68, 119  
     Integrated Project Plan (IPP), 62, 64,  
         98, 218  
     iterative approach, 63–64, 130  
     labor requirements analysis, 122  
     large/complex projects, 111, 115,  
         118–122  
     Mission Statement, project, 66, 67,  
         68, 118

- Needs and Wants template, revisiting, 68–69
- objectives, project, 69–70, 119
- outline, sample, 115, 116
- Project Management Life Cycle (PMLC) and, 6, 57, 63, 82
- quality, commitment to, 121
- rating effectiveness of, 102
- requirements analysis, 33, 58, 79–81
- revision log, 117
- risks, relevant, 72, 120
- scope, project, 68–69, 116, 120
- sign-offs, 76, 123, 127, 157
- stakeholders and, 112–115, 121
- table of contents, 116, 118
- team structure, 121
- template, 65, 219
- tools for developing lists for items in, 122–123
- Vignette 1 (The Birth of a Project, by Peter J. McAliney), 11–13
- Vignette 5 (The “Real” Process of Developing the Charter: Chartering, by Stephen H. Baum), 124–125
- “Yikes” moment after sign-off, 127
- Project management:
  - ancient examples, 3
  - culture, 159–160
  - definition of terms, 3–4
  - flow diagram, 6
  - growth of/need for, 4, 10
  - inexperienced versus experienced project managers, 1, 109
  - project flow, overview, 5–7
  - stages (*see* Project stages)
- Project Management Life Cycle (PMLC):
  - as communication tool, 25
  - context agnostic, 25
  - defined/overview, 4, 15, 16–17
  - as generic shell, 18
  - graphic representations of, 16, 17, 18, 30, 59, 63, 77
  - power of, 25
  - stages (*see* Project stages)
  - stakeholders and, 22
  - tools, 20–22, 82
  - variations, 15
  - Work Cycle and, 17–20, 23, 25 (*see also* Work Cycle)
- Project Management Office (PMO), 159
- Project managers:
  - accountability, 8
  - application-specific competence/role, 19–20, 194
  - budget responsibilities, 7, 22
  - Business Case and, 32
  - calmness under pressure, 192–193
  - communications role/skills, 7, 9, 190–191
  - consistency, 193
  - defined, 4, 113
  - delegating role/skills, 7, 193
  - duties of traditional manager, 7
  - empathy, 193–194
  - flexibility, 194
  - follow through, 194
  - inexperienced/experienced, 1, 109
  - integrity, 192
  - negotiating, 7, 191
  - organizing, 7
  - overview, role/responsibility, 7–9, 189
  - problem solving skills, 191–192
  - process, 7
  - professional development as, 189–190
  - project size and granularity, and, 1, 89, 109
  - requirements analysis process and, 22, 80–81
  - scope, project, 22 (*see also* Scope, project)
  - self-inventory, 194–195, 196

- Project managers (*continued*)  
 skills and qualities required, 190–195  
 sponsor relationship, 62  
 team and, 7, 60, 193  
 time (schedule), 7, 22  
 visionary leadership, 190
- Project Perfect, 47, 56
- Project Plan. *See* Planning (Stage 2)
- Project-related risks, 121
- Project stages, 5–7  
 Stage 1: Concept, 6, 29–31 (*see also* Business Case; Conceptualizing (Stage 1))  
 Stage 2: Plan, 6, 57–63 (*see also* Planning (Stage 2); Project Charter)  
 Stage 3: Execute and Control, 6, 99–101, 195, 196 (*see also* Status reporting)  
 Stage 4: Close, 6–7, 59, 102–103, 183–184, 205
- Project team. *See* Team(s), project
- Quality:  
 commitment to, in Project Charter, 121  
 cost of, 156  
 intervention policy, 156  
 metrics (Vignette 6: Project Management: A Behavioral Approach That Requires Discipline, by Robert A. Wasson), 158–160  
 plan, 156–157  
 reporting, 182–183  
 standards, 156
- Questionnaires, 78, 122–123
- Quick shift list, 151
- Radio Airtime Project, 134, 135, 136, 138
- Rationale, project, 119
- Real life experience. *See* Vignettes
- Redundancy costs, 172
- Requirements analysis:  
 As-Is analysis, 58, 80  
 checklist, 80  
 defining general business requirements, 80  
 executive abstract, 80  
 involving stakeholders, 33, 80  
 meetings, 80  
 Planning Stage, 58, 79–81  
 Requirements Document appended to Project Charter, 80
- Research Development & Engineering (RD&E), quality metrics (Vignette 6: Project Management: A Behavioral Approach That Requires Discipline, by Robert A. Wasson), 158–160
- Reserve management, 22, 99
- Resistance, 210
- Resources, managing, 7
- Responsibility-accountability map, 137–139
- Return on investment (ROI), 32, 42, 49–50, 54–55
- Revision log, defined, 117. *See also* Change(s), project
- Risk:  
 Business Case, 38–40, 53–54  
 business-related, 121  
 contingency plan, 143, 156, 157  
 diversifying, 50–51  
 estimates and, 146  
 external, 121  
 identification chart, 132, 143, 226  
 partner-related, 121  
 probability analysis, 130–132  
 Project Charter, iterations, 65, 72, 120, 130–132  
 project-related, 121  
 risk/impact analysis grid, 39  
 scatter diagram, 40  
 sign-off package, 157

- sources of, 121, 130
- of using float, 148
- Road map, 5–6, 16, 59, 62, 77. *See also* Project Management Life Cycle (PMLC)
- Scatter diagram of risks and impacts, 40
- Schedule, project:
  - calendar duration/Gantt Chart, 21, 57, 82, 93–98, 101, 149
  - dependency analysis, 90–91
  - earliest finish date (EF), 147
  - earliest start date (ES), 147
  - efficiency ratios and, 94–98
  - estimating in effort and converting to duration, 94
  - flexibility, determining, 147–149
  - float, 91–93, 147
  - Gantt Chart, turning network into, 57, 93
  - latest finish date (LF), 147
  - latest start date (LS), 147
  - network, 20, 57, 82, 90–93, 141–142, 157
  - Precedence Diagram, 147
  - sign-off package, 157
- Schedule variance (SV) and schedule variance index (SVI), 175
- Scientific method, sample work cycle, 19
- Scope, project:
  - As-Is analysis and development of, 78
  - iterative definitions, 65
  - preliminary, 36–38
  - in project management triangle (project drivers), 22–23, 74–75, 131, 171
  - statement of (in Project Charter), 68–69, 120
  - Work Breakdown Schedule and, 37, 81
- Scope creep, 120
- Service/product, defined, 4
- Shelton, Robert D., 49
- Sick time, 94
- Sign-offs:
  - completion, 184
  - by key milestones, 98
  - ownership of deliverables, 137
  - project, 157
  - Project Charter, 76, 123
  - rule of thumb for timing of, 76
  - by stage, 98
- Skills/qualities:
  - project manager requirements, 190–195
  - Skills and Qualities Self-Inventory, 195, 196
  - stakeholder analysis, 201
- Skunk works, 207–209
- Solution development, 120
- Sponsor, project (defined), 4, 113. *See also* Stakeholder(s)
- Stages. *See* Project stages; Team life cycle
- Stakeholder(s):
  - analysis, 75–76, 112–115, 195–202
  - Business Case development and, 32, 33, 41
  - charts/tables:
    - Individual Communication Plan, 197, 198–199, 200–202, 236–237
    - Stakeholder Analysis Chart (Table 5.1), 114, 225
    - Stakeholder Chart: Strategic Communications Plan (Table 6.6), 151, 154–155, 195, 200, 228–229
  - communications plan and, 151
  - conflicting needs of, 113
  - defined, 4, 112–113
  - Executing Stage and, 196
  - expectations, managing, 15, 61, 150, 170, 176–177
  - missing from project, 7, 22, 132
  - Planning Stage and, 75–76, 93, 195

- Stakeholder(s) (*continued*)
- in Project Charter, 121
  - in sign-off package, 157
  - socializing project plan among, 131–132, 157
  - types of, 4, 113
- Standard deviation, 146
- Standards, quality, 156
- Start-to-start dependency, 141
- Status reporting, 8, 161–188
- blogs, 184–185
  - communications mechanisms, 162–170
  - completion, 183–184
  - dashboards, 184–185
  - dimensions of, 162
  - elevator report, 162–170, 230–233
  - Executing Stage activities list, 101
  - Gantt Chart used in, 96
  - operating communication plan
    - introduced, 162
  - planned progress, 162, 170–176
  - progress as it relates to budget, 171–172
  - progress as it relates to time line, 171
  - project changes, 162, 176–178
  - project disruptions, 162, 178–182
  - quality, 182–183
  - strategic communication plan
    - introduced, 162
  - tracking tools, 172–176
- Storming stage, team life cycle, 203–204
- Strategic alignment, business case and, 43–44, 45
- Strategic communication plan, 150–155, 162, 228–229
- Strategic goals, example, 67
- Strategic Plan Document (example, We See It Better Company), 67
- Subject matter, WBS organized by, 83, 220
- Subject matter experts (SMEs), 20, 58, 64, 88, 96
- Supervisory costs, 172
- Task(s):
- costing and, 92
  - declension, 85
  - dependence relationships:
    - finish to finish, 141
    - finish to start, 141
    - start to start, 141
  - effort formula, 87
  - estimating size of, 88, 89
  - work packet another name for, 136
- Task Lists, developing, 139–140
- ordering:
    - by discipline, 139
    - by step, 139
  - project team engagement, 140
  - revising time estimates:
    - benchmarks, 140
    - bottom up—top down, 140
    - historical information, 140
- Task on line (type of network), 90
- Team(s), project:
- building, 7, 61
  - defined, 113
  - project manager role, 7, 8, 9
- Team life cycle, 202–206
- backward movement through, 205
  - phase 1 (forming), 203
  - phase 2 (storming), 203–204
  - phase 3 (norming), 204–205
  - phase 4 (performing), 205
  - phase 5 (adjourning and transforming), 205
  - productivity during (by phase), 206
- Team orientation and delegating skills, 193
- Team types, 121, 206–209
- hierarchical structured teams, 206–207
  - matrix structured or project matrix teams, 207, 208
  - skunk works, 207–209
  - tiger teams, 207, 209
- Templates, 213–237
- 3M Post-it notes, 49

- Tiger teams, 207, 209
- Time (schedule) as project driver, 22, 171. *See also* Drivers, project (time/cost/requirements)
- Time estimates:
- calculating (Helicopter Approach, third iteration), 145–147
  - early in project, 21
  - expected time estimate (T), 145
  - formula for task effort (e), 145–146
  - most likely estimate (Tml), 145
  - optimistic estimate (To), 145
  - PERT and, 144
  - pessimistic estimate (Tp), 145
  - revising, 140
    - bottom up—top down, 140
    - using benchmarks, 140
    - using history, 140
- Time line, 7, 170–171
- Tracking tools, 172–176
- cost variance (CV) and cost variance index (CVI), 175
  - earned value analysis (EVA), 173–174
    - actual cost of work performed, 174
    - budget cost of work performed, 174
    - budgeted cost of work scheduled, 173–174
  - percent complete, 176
  - percent spent, 176
  - schedule variance (SV) and schedule variance index (SVI), 175
  - trend analysis, 172–173, 174
  - variance analysis, 172, 173
- Traditional manager, duties of, 7
- Training (project manager role), 8
- Transforming/adjourning stage, team life cycle, 205
- Trend analysis, 172–173, 174
- Triangle, project management (project drivers), 22–23, 74–75, 131, 171
- Turbit, Neville (Vignette 3), 47–56
- 20 hours of effort as Work Assignment maximum, 86
- 24-hour rule, 193
- 27.5 hours of effort in 40-hour week, 93
- Unknowns, 7
- Upgrades, postponing major, 53
- Value:
- earned value analysis (EVA), 173–174
    - project, 31
  - Value-added resellers (VARs), 186
  - Variance analysis, 172, 173, 175
  - Vendors/suppliers, 113, 122
  - Venture capital approach, 50
  - Verbal presentations (project manager role), 8
  - Verbs/nouns or past-tense events, in WBS, 34
  - Vignette 1 (The Birth of a Project, by Peter J. McAliney), 11–12
  - Vignette 2 (Project Management, an Undergraduate’s Best Friend, by Elaine Delos Reyes), 26–27
  - Vignette 3 (Why Go to the Trouble of Developing a Business Case?—White Paper: An Alternative to the Business Case, by Neville Turbit), 47–56
  - Vignette 4 (Putting the Project Life Cycle to Work in Higher Education, by Lillian O’Reilly), 104–107
  - Vignette 5 (The “Real” Process of Developing the Charter: Chartering, by Stephen H. Baum), 124–125
  - Vignette 6 (Project management: A Behavioral Approach That Requires Discipline, by Robert A. Wasson), 158–160
  - Vignette 7 (The Wisdom in Waiting, by Deborah Z. Farmer), 186–188
  - Vignette 8 (The Early Bird Gets the Worm, by Brian Hagen), 211–212
- Virtual filing cabinet, 152

- Vision and Mission Statement, 43, 67
- Visionary leadership, project manager and, 190
- Visual devices, example project: We See It Better company, 66–76
- Visual Effects House: Vignette 5 (The “Real” Process of Developing the Charter: Chartering, by Stephen H. Baum), 124–125
- WAGs (Wild A%# Guesses), business case figures, 36, 41
- Wants/needs (Business Case), 34–36, 41, 68–69, 113, 216
- Wasson, A. Robert (Vignette 6), 158–160
- Weeding out process, 30–31
- We See It Better company, planning example, 66–76
- Work, “the”:  
   defining (*see* Work Breakdown Structure (WBS))  
   planning, 57, 61–63  
   project manager tied to, 19–20
- Work Assignments, 86, 89
- Work Breakdown Structure (WBS), 81–89, 127–128, 133–137  
   building-block approach, 82  
   defined, 20, 81–82  
   deliverables:  
     breaking into smaller units (or subprojects), 134  
     identifying, 133–134  
     organizing WBS by, 84  
   estimating work assignments and activities, 86–89  
   examples, 87, 134, 135  
   formats, 136–137  
   graphic, 136  
   tree structure (outline form), 136  
   granularity, 40, 85, 87, 88, 89
- Helicopter Approach to project planning, and, 128, 129, 133–137 (*see also* Iterative “Helicopter Approach”)  
   as internal (versus external) project management tool, 96  
   numbering schema/coding, 85, 135, 136  
   organization of, 82–85  
     choosing which organization works best, 84–85  
     by content or subject matter, 83, 220  
     by Work Cycle (phases), 82, 83  
   in PMLC tool progression, 82  
   scope of project and, 37, 81  
   in sign-off package, 157  
   wording (nouns/verbs/past-tense events), 134  
   work components, 135, 137  
   Work Cycle (phases) and, 82, 83  
   work packets, 136
- Work Cycle:  
   Business Systems Analysis and Design (BSA&D), 19, 78  
   defined/described, 17–20, 82  
   Project Management Life Cycle (PMLC) and, 15, 18, 23, 58  
   samples:  
     from business systems analysis and design, 19  
     from engineering, 19  
     from scientific method, 19  
   tools/techniques related to, 78  
   Work Breakdown Structure and, 82–85, 220
- Work packets, 136
- Work Tasks, ordering by discipline/step, 139
- Wycoff, Joyce, 55–56