

Index

• *Symbols and Numerics* •

50/50 method, of calculating Earned Value, 325

• *A* •

AC (Actual Cost), 316

ACWP (Actual Cost of Work Performed), 316

accountability

enforcing without direct authority, 189–190

importance of holding, 192–193

for responsibility, 189

understanding concept of, 182

accounting software, uses of, 293

accuracy

ensuring Linear Responsibility Chart, 196–198

increasing risk estimate, 158

versus precision, 158

achieved power, versus ascribed power, 258–259

acronyms, sharing new skills with, 312

action plan, preparing for new

skills/knowledge use, 312

action verbs, using to clarify work, 66–67

activities

accomplishing with minimum time/resources, 181–182

applying new skills/knowledge to, 311

clarifying with action verbs, 67

decomposing, 62–63

defining on work-order agreement, 203

determining precedence of with network diagram, 96–98

different hierarchical schemes for

classifying, 71–72

estimating duration of, 111–114

finding relating, 31

flowchart of in project plan, 346

flowchart of when controlling project performance, 348

gathering necessary information about, 81–82

identifying risks while detailing, 80–81

identifying/defining, 331

improving duration estimates, 114–115

leadership versus management

approaches to, 256

Linear Responsibility Chart defining ways

of participating in, 191

monitoring critical-path, 223

in multiple-project environment, 280

as network diagram element, 87

with no obvious breakpoints, 69

planning for similar in multiple-project

environment, 289–290

preparing closure, 267

representing conditionally repeating, 67–69

scheduling in multiple-project

environment, 287–288

scheduling start/end dates for, 331–332

versus strategy, 35

subdividing to shorten schedules, 110–111

supporting with software, 297–298

activities list, displaying schedules using, 115

activity performance, limiting projects

with, 41

activity-in-the-box approach, to drawing

network diagrams, 88–89

activity-in-the-node approach, to drawing

network diagrams, 88–89

activity-jumping, in multiple-project

environment, 288

activity-on-the-arrow approach, to drawing

network diagrams, 89

Actual Cost (AC), 316

Actual Cost of Work Performed (ACWP), 316

administrative issues, of project

conclusion, 268

allowable payback period, including in

benefit-cost analysis, 17

annual budgets, understanding

organizational priorities with, 31

approvals, on work-order agreement, 203

- ascribed power, versus achieved power, 258–259
 - assessments, motivating with, 263
 - assignments, coordinating across multiple projects, 136–137
 - assumptions
 - identifying, 331
 - including in planning, 44
 - making to clarify planned work, 66
 - possible risk factors of, 154
 - on Statement of Work, 24
 - using caution making, 335
 - audience. *See also* champions; drivers; observers; supporters; team members
 - announcing project closure to, 270
 - announcing project to, 213–214
 - confirming participation of, 202–204
 - determining for written project-progress reports, 249
 - identifying drivers, supporters, observers in, 53–54
 - identifying in multiple-project environment, 281
 - identifying potential project, 27–28
 - identifying/defining authority of members in, 59–60
 - importance of determining, 330
 - importance of including champions in, 55
 - introducing project to in multiple-project environment, 287
 - maintaining involvement of, 54–57
 - in multiple-project environment, 280
 - planning involvement of, 54–57
 - possible risk factors of, 153
 - understanding project's, 45–46
 - audience list template, creating, 52–53
 - audience lists
 - developing, 46–50
 - developing in multiple-project environment, 281
 - guidelines for complete, up-to-date, 50–51
 - authority
 - challenge of lack of direct, 12
 - delegating, 183
 - enforcing accountability without direct, 189–190
 - establishing power bases with, 259–260
 - identifying/defining audience members', 59–60
 - minimizing risks of delegating, 187
 - as request incentive, 257
 - versus responsibility, 182–183
 - supporting delegations of, 185–187
 - understanding concept of, 182
 - automated impact assessment, using for risk to estimation/assessment, 161
 - availability
 - versus efficiency, 128
 - factoring into required work effort estimations, 126
- **B** ●
- backing in, to schedules, 104
 - backward pass, analyzing network diagrams with, 94–96
 - balanced matrix, 171
 - baseline
 - rebaselining, 239
 - setting, 213
 - bases, establishing power, 259–260
 - BCWP (Budgeted Cost of Work Performed), 316
 - BCWS (Budgeted Cost of Work Scheduled), 316
 - beneficiaries, identifying project, 27–28
 - benefit-cost analysis, 16–17, 30
 - benefits, increasing commitment by
 - clarifying project, 261–262
 - bottom-up approach, developing budgets with, 145–146
 - brainstorming approach, to developing Work Breakdown Structure, 73–74
 - brevity, describing objectives with, 37
 - bubble-chart format, for Work Breakdown Structure display, 77–78
 - Budgeted Cost of Work Performed (BCWP), 316
 - Budgeted Cost of Work Scheduled (BCWS), 316
 - budgets
 - refining, 144–145
 - stages of, 143–144

business graphics and presentation
software, uses of, 293

business requirements document, versus
Statement of Work, 24

buy-in, involving team in Linear
Responsibility Chart for, 196

• C •

“can-do” person, importance of being, 333
capital appropriations plans,
understanding organizational priorities
with, 32

career development, resolving
skills/knowledge weaknesses with, 120

categorizing, audience lists, 47

category ranking, expressing likelihood of
risk with, 157

centralize structure, overview, 172–173

champions

confirming participation of, 204
identifying, 28

importance of including, 55
value in matrix structure, 180

change
managing in multiple-project
environment, 289

requests for, 239–240

responding to requests, 240–241

through scope creep, 241

characteristics, of projects, 10

charts

analyzing schedule performance with,
221–222

bubble-chart format for Work Breakdown
Structure display, 77–78

computer usage, 141

developing Linear Responsibility Chart,
195–196

displaying schedules using combined
milestone and Gantt, 115, 116

displaying schedules using Gantt, 115

ensuring accuracy of Linear
Responsibility Chart, 196–198

flow, of activities and information in
project plan, 346

flow, of activities and information when
controlling project performance, 348

illustrating relationships with Linear
Responsibility Chart, 191–193

organization-chart format for Work
Breakdown Structure display, 76

reading Linear Responsibility Chart,
193–195

summary usage chart for nonpersonnel
resources, 141

classical approach, to drawing network
diagrams, 89

clients

in multiple-project environment, 279

as part of project audience, 47

close phase

administrative issues, 268

conducting post-project evaluation at,
270–276

importance of complete, 265–266

importance of finishing, 20–21

overview, 19

planning for, 266–267

possible risk factors during, 153

preparing for post-project evaluation
during, 272

providing team members transition for,
269–270

refining budget during, 145

reinforcing team focus/interest to,
267–268

updating plans at, 267

closure activities, preparing, 267. *See also*
project conclusion

combined activities and key-events report,
analyzing schedule performance with,
221

combined key-events/activities list,
displaying schedules using, 115, 116

combined milestone chart and Gantt
charts, displaying schedules using,
115, 116

commitment

creating accountability with, 190

finding success through, 258–259

formalizing resource in multiple-project
environment, 285

- commitment (*continued*)
 - importance of team-member, 179
 - increasing by clarifying project benefits, 261–262
 - personal versus organizational, 192
 - reconfirming for project control, 218–219
 - reinforcing team to project conclusion, 267–268
 - for successful project management operations, 11
- committees, versus teams, 206
- communication
 - about risk, 164
 - ad hoc team meetings, 253–254
 - among team members, 180
 - controlling project with, 218
 - developing procedures for team, 208–209
 - effective meetings, 246–248
 - importance of clear, 334
 - importance of effective, 243–244
 - motivating with assessments, 263–264
 - regularly scheduled team meetings, 252–253
 - sharing new skills, 313–314
 - for successful project management operations, 11
 - types/uses of project, 244
 - upper-management progress reviews, 254
 - using e-mail for, 299–302
 - using technology to support virtual teams, 303–304
 - written project-progress reports, 248–252
 - written reports, 244–246
- computer usage chart, 141
- conceive phase
 - communicating about risk during, 164
 - overview, 15–17
 - possible risk factors during, 152
 - preparing budget estimate during, 144
 - preparing for post-project evaluation during, 271
- conditional activities, representing repeating, 67–69
- confidence, developing with micromanagers, 199–200
- conflict resolution, 209, 286
- conflicts, identifying/addressing, 180
- consequences, estimating extent of risk, 159–161
- constraints
 - identifying, 330
 - meeting established time with schedules, 105
 - possible risk factors of, 154
 - on Statement of Work, 24
- contingencies, managing risk with, 163
- contract, versus Statement of Work, 24
- contractors, as part of project audience, 47
- control
 - avoiding scope creep, 241
 - establishing, 235–236
 - formalizing process of, 236–237
 - identifying corrective actions, 238–239
 - identifying problem causes, 237–238
 - maintaining, 347–348
 - monitoring expenditures, 232–235
 - monitoring schedules, 220–226
 - monitoring work effort, 226–230
 - overview, 217–219
 - as project management operation, 11
 - rebaselining for, 239
- corrective actions
 - controlling project with, 218
 - identifying for variances/delays, 238–239
- cost reports, analyzing expenditures with, 232
- cost variance
 - defined, 316
 - determining reasons for, 320
 - mathematically defined, 317
- cost variance percentage (CVP), determining, 317
- costs. *See also specific costs*
 - estimating project, 145–148
 - importance of estimating, 141–142
 - types of, 142–143
- critical paths
 - defined, 91
 - determining project's length with, 91–92
 - determining with forward pass, 92–93
 - monitoring activities on, 223
- cross-project dependencies, handling in multiple-project environment, 283

customers, as part of project audience, 47
CVP (cost variance percentage),
determining, 317

• D •

data

collecting and improving accuracy of
expenditure, 234
collecting schedule performance, 223–224
collecting work effort, 227–228
defining for tracking schedule
performance, 220–221
improving accuracy of schedule
performance, 224–225
improving accuracy of work effort
expenditure, 228–229

database software, uses of, 293

Day planner in scheduler software,
uses of, 293

deadlines, challenge of, 85

decision making, developing procedures
for, 209

decision trees, using for risk
estimation/assessment, 160

decomposing, activities, 62–63

define phase

avoiding skipping, 20
communicating about risk during, 164
overview, 17–18
possible risk factors during, 152
preparing budget estimate during, 144
preparing for post-project evaluation
during, 271

delays

identifying causes of, 237–238
identifying corrective actions for, 238–239

delegating

defined, 183
guidelines for, 184–185
minimizing risks of, 187
supporting decisions of, 185–187

deliverables

motivating with, 263
understanding, 86–87

denial approach, to risk, 163

dependency diagramming approach, to
drawing network diagrams, 88–89
design questionnaire, using work effort for,
123

detail

determining appropriate amount of, 65–66
following up meetings with, 248
importance in planning, 62–63
importance of including, 334–335

direct authority

challenge of lack of, 12
enforcing accountability without, 189–190

direct costs, 142, 143

discount rate, including in benefit-cost
analysis, 17

distribution lists, identifying part of project
audience, 46

Doucette, Martin (*Microsoft Project For
Dummies*), 98

drivers

agreeing on project objectives, 38
categorizing, 330
communicating about risk to, 164
confirming participation of, 204
determining expectations and needs of
project, 29–30
identifying in audience, 53–54
maintaining involvement of, 57–59
planning involvement of, 54–56
versus supporters, 27

duration. *See also* span time

accomplishing activities with minimum, 181
defining on work-order agreement, 203
determining project time required with, 86
estimating activity, 111–114
improving estimates of activity, 114–115
span time as, 87

• E •

EAC (Estimate at Completion), 316, 318

earliest finish date

defined, 91
determining with forward pass, 92–93

earliest start date

defined, 91
determining with forward pass, 92–93

- Earned Value (EV), 316, 324–326
 - Earned Value Management (EVM)
 - applying, 320–323
 - calculating Earned Value for, 324–326
 - defined, 233
 - overview, 315
 - understanding formulas of, 316–318
 - using formulas of, 318–320
 - economies of scale, using in multiple-project environment, 290
 - efficiency
 - versus availability, 128
 - factoring into personal estimates, 128–131
 - factoring into required work effort estimations, 126
 - reflecting when using historical data, 127
 - efficiency studies, factoring into required work effort estimations, 126
 - elements, for successful project management operations, 11
 - e-mail
 - advantages and disadvantages of, 299–300
 - guidelines for best use of, 302
 - using appropriately, 301–302
 - end users
 - discovering real, 49
 - as part of project audience, 48
 - Estimate at Completion (EAC), 316, 318
 - estimating
 - activity duration, 111–115
 - avoiding using hierarchical work-effort, 130
 - budgets, 143–144
 - costs, importance of, 141–142
 - extent of risk consequences, 159–161
 - factoring efficiency into personal, 128–131
 - indirect costs, 148
 - likelihood of risks, 156–159
 - versus negotiating, 113
 - personnel need with Human Resources Matrix, 122–123
 - project costs, 145–147
 - required work effort, 124–125
 - using productivity, efficiency, and availability information for, 125–126
 - EV (Earned Value), 316, 324–326
 - events
 - motivating with, 263
 - understanding, 86–87
 - EVM (Earned Value Management)
 - applying, 320–323
 - calculating Earned Value for, 324–326
 - defined, 233
 - overview, 315
 - understanding formulas of, 316–318
 - using formulas of, 318–320
 - excuses
 - dealing with, 13–14
 - for lack of specificity in project objectives, 39–40
 - expectations
 - determining project drivers', 29–30
 - finding strategies to meet, 36
 - expenditures
 - analyzing, 232–233
 - collecting and improving accuracy of data on, 234
 - monitoring, 230–232
 - selecting tracking systems for, 234–235
 - expertise, as request incentive, 257
 - external collaborators, as part of project audience, 47
- **F** ●
- factors, determining underlining activity, 112
 - fast tracking, meeting established time constraints using, 105
 - feasibility, increasing motivation by demonstrating project, 262–263
 - 50/50 method, of calculating Earned Value, 325
 - financial expenditures, tracking, 212
 - float. *See also* slack time
 - flowchart
 - of activities and information in project plan, 346
 - of activities and information when controlling project performance, 348
 - formal communication. *See also* communication
 - ad hoc team meetings, 253–254
 - defined, 244
 - effective meetings, 246–248
 - regularly scheduled team meetings, 252–253
 - upper-management progress reviews, 254

- written project-progress reports, 248–252
- written reports, 245–246
- formal training
 - evaluating instructor credibility, 307–308
 - evaluating instructor style, 308–309
 - evaluating organizational credentials, 309
 - evaluating program content, 306–307
 - evaluating program presentation style and format, 307
 - sources of, 306
- formats, options for Work Breakdown Structure display, 76–78
- forming stage, of relationships, 210
- formulas
 - understanding Current Value Management, 316–318
 - using Earned Value Management, 318–320
- forward pass, analyzing network diagrams with, 92–93
- fudge factors, avoiding using, 114
- functional manager
 - importance of support of, 180
 - matrix structure responsibilities of, 177–178
- functional structure, overview, 174–175
- functions, classifying activities by, 71
- funds, possible risk factors of, 155

• G •

- Gantt charts, displaying schedules using, 115
- gaps
 - eliminating in planning, 63
 - revealing in staff skills and knowledge, 120
- general and administrative costs, understanding, 142
- geographical areas, classifying activities by, 71
- goals
 - developing team and individual, 207
 - focusing on common, 334
 - importance of developing team, 206
 - shared, as request incentive, 257
- groups
 - as part of project audience, 47
 - versus teams, 206

• H •

- hierarchical approach, to planning, 63–67
- hierarchical schemes
 - for classifying activities, 71–72
 - considering various while planning, 74–75
- hierarchical work-effort estimates, avoiding, 130
- hierarchy, developing for Linear Responsibility Charts, 196
- historical data, reflecting efficiency when using, 127
- Human Resources Matrix, estimating personnel needs with, 122–123

• I •

- ideas, identifying initiator of, 26–27
- identifiers, on work-order agreement, 203
- identity, as request incentive, 257
- indented-outline format, for Work Breakdown Structure display, 77
- indirect costs
 - estimating, 148
 - examples of, 143
 - understanding, 142
- inflation, including in benefit-cost analysis, 16–17
- informal communication, 244. *See also* communication; formal communication
- information. *See also* project management information system (PMIS)
 - estimating risk with objective, 157
 - finding supporting for estimations, 113–114
 - flowchart of in project plan, 346
 - flowchart of when controlling project performance, 348
 - gathering necessary about activities, 81–82
 - reflecting efficiency when using
 - historical, 127
 - for successful project management operations, 11
 - thoroughly searching, 32–33
- ingredients, projects, 10
- initiator
 - identifying project, 26–27
 - as part of project audience, 47

inputs, of project management information system, 219

instructors

- evaluating credibility of training, 307–308
- evaluating style of, 308–309

insurance, managing risk with, 163

integrated project-management software, versus stand-alone, specialty software, 292–297. *See also* software

interest, representing personnel, 119

intranet, sharing new skills through, 313

• J •

jargon

- describing objectives with, 37
- sharing new skills with, 312

• K •

Key Performance Indicators (KPIs), understanding organizational priorities with, 32

key-events lists, displaying schedules using, 115

knowledge

- applying new, 311–312
- determining people's, 118–122
- improving through formal training, 306–309
- improving through professional certification, 310
- improving with mentor, 309–310
- sharing new, 312–314

known unknown, dealing with, 80

• L •

labor reports, analyzing work effort expended with, 227

latest finish date

- defined, 91
- determining with backward pass, 94–96

latest start date

- defined, 91
- determining with backward pass, 94–96

leadership, versus management, 255–256

legal requirements, determining activity precedence using, 97

level of effort

- analyzing expended, 226–227
- collecting data for, 227–228
- considering productivity, efficiency, and availability information for, 125–126
- estimating required, 124–125
- improving accuracy of data on, 228–229
- measuring, 123
- selecting tracking systems for, 229–230
- versus span time, 87

life phases

- administrative issues during close phase, 268
- avoiding mistakes during start phase, 20
- avoiding shortcuts through define phase, 20–21
- avoiding skipping define phase, 20
- close phase, 19
- communicating about risk during, 164
- conceive phase, 15–17
- conducting post-project evaluation at close phase, 270–276
- define phase, 17–18
- importance of complete close phase, 265–266
- importance of finishing close phase, 20–21
- overview, 14
- perform phase, 19
- planning for close phase, 266–267
- planning involvement of drivers during, 54–56
- planning involvement of observers during, 57
- planning involvement of supporters during, 56–57
- possible risk factors during close phase, 153
- possible risk factors during conceive phase, 152
- possible risk factors during define phase, 152
- possible risk factors during perform phase, 153
- possible risk factors during start phase, 152
- preparing budget estimate during conceive phase, 144
- preparing budget estimate during define phase, 144
- preparing for post-project evaluation during close phase, 272

- preparing for post-project evaluation
 - during conceive phase, 271
 - preparing for post-project evaluation
 - during define phase, 271
 - preparing for post-project evaluation
 - during perform phase, 272
 - preparing for post-project evaluation
 - during start phase, 271–272
 - preparing/refining budgets through, 144–145
 - providing team members transition for
 - close phase, 269–270
 - refining budget during, 145
 - reinforcing team focus/interest to close
 - phase, 267–268
 - start phase, 18–19
 - updating plans at close phase, 267
 - limitations
 - avoiding vague, 42
 - determining, 42
 - including in project plans, 43
 - types of project, 41
 - limitations constraints, versus needs
 - constraints, 330
 - Linear Responsibility Chart (LRC)
 - developing, 195–196
 - ensuring accuracy of, 196–198
 - illustrating relationships with, 191–193
 - reading, 193–195
 - logical relationships, determining activity
 - precedence using, 97
 - long-range plans, understanding
 - organizational priorities with, 31
 - long-term projects, planning, 70–71
 - lost return on investment, including in
 - benefit-cost analysis, 16–17
- M ●
- management, versus leadership, 255–256
 - managerial choices, determining activity
 - precedence using, 97
 - market requirements document, versus
 - Statement of Work, 24
 - matrix structure
 - advantages of, 171
 - disadvantages of, 171–172
 - functional managers responsibilities in, 177–178
 - key players in, 175–176
 - overview, 170–171
 - project manager responsibilities in, 176–177
 - project team members responsibilities in, 177
 - upper management responsibilities in, 178
 - working successfully in, 179–180
 - meetings
 - ad hoc team, 253–254
 - conducting efficient, 247–248
 - conducting post-project evaluation, 274–275
 - creating schedules for, 213
 - following up on, 248
 - holding regularly scheduled team, 252–253
 - overview, 246
 - planning successful, 247
 - preparing for post-project evaluation, 272–274
 - mentors, working with, 309–310
 - micromanagement
 - overview, 198
 - responding to, 199–200
 - understanding reasons for, 198–199
 - working with, 200
 - Microsoft Project For Dummies* (Doucette), 98
 - milestone method, of calculating Earned Value, 325
 - milestones
 - motivating with, 263
 - understanding, 86–87
 - mistakes
 - avoiding repeating, 276
 - avoiding shortcuts through life phases, 20–21
 - monitoring
 - expenditures, 230–235
 - importance of close, 70
 - schedule performance, 220–226
 - work effort, 226–230
 - motivation
 - encouraging in team members, 260–261
 - increasing by clarifying project benefits, 261–262
 - increasing by demonstrating project feasibility, 262–263
 - reinforcing team to project conclusion, 267–268
 - using rewards for, 264

- multiple-project environment
 - assessing risks in, 284
 - creating teams in, 286
 - differentiating roles in, 282–283
 - formalizing resource commitments in, 285
 - handling conflicting resource demands in, 283–284
 - identifying audiences in, 281
 - identifying cross-project dependencies in, 283
 - managing changes in, 289
 - overview, 279–281
 - planning for similar activities in, 289–290
 - preparing Statement of Work in, 282
 - preparing Work Breakdown Structure in, 282
 - reporting progress in, 288
 - scheduling activities in, 287–288
 - using economies of scale in, 290

• N •

- need constraints, versus limitations
 - constraints, 330
- needs
 - assuring project addresses, 31
 - determining project drivers', 29–30
 - identifying project success, 43
- net present value (NPV), finding in benefit-cost analysis, 16–17
- network diagrams
 - activity-in-the-box approach to drawing, 88–89
 - activity-on-the-arrow approach to drawing, 89
 - analyzing picnic example with, 99–103
 - analyzing with backward pass, 94–96
 - analyzing with forward pass, 92–93
 - benefits of analyzing, 89
 - determining precedence of activities with, 96–98
 - developing schedules with, 104
 - importance of duration and sequence to, 86
 - interpreting, 91–92
 - necessary elements of, 86–87
 - reading correctly, 90–91
- noncritical paths
 - defined, 91
 - determining with forward pass, 92–93

- norming stage, of relationships, 210
- NPV (net present value), finding in benefit-cost analysis, 16–17
- numerical scales, evaluating personnel skill and knowledge using, 119–120

• O •

- objectives
 - identifying all types of, 38–39
 - possible risk factors of, 154
 - resistance to clearly defined, 39–40
 - specifying and clarifying, 36–38
 - on Statement of Work, 24
- observers
 - announcing project to, 213–214
 - categorizing, 330
 - identifying in audience, 53–54
 - maintaining involvement of, 57–59
 - planning involvement of, 57
- operating processes. *See also* processes
- operations
 - basic project management, 11
 - integrating software into project, 299
- opposition, identifying project, 28
- ordinal ranking, expressing likelihood of risk with, 157
- organizational environment
 - centralize structure, 172–173
 - defining, 169–170
 - functional structure, 174–175
 - key players in matrix structure, 175–178
 - matrix structure, 170–172
 - working successfully in matrix structure, 179–180
- organizational units, classifying activities by, 71
- organization-chart format, for Work Breakdown Structure display, 76
- organizations
 - emphasizing importance of project to, 31–32
 - introducing project to in multiple-project environment, 287
 - as source of project audience, 47
- organizing
 - importance of in planning stage, 61–62
 - as project management operation, 11
- original ideas, identifying initiator of, 26–27

ostrich approach, to risk, 163
outcomes, specifying projected, 330
outputs, of project management
 information system, 219
over detailing, determining, 65–66
overhead costs, understanding, 142
overlaps, eliminating in planning, 63
overloads, resolving potential resource,
 133–136
oversight committee, upper management
 establishing, 180

• p •

participation, confirming team members',
 202–204
people. *See also* personnel
percent completed, tracking performance
 with, 220
percent-complete method, of calculating
 Earned Value, 325
perform phase
 communicating about risk during, 164
 overview, 19
 possible risk factors during, 153
 preparing for post-project evaluation
 during, 272
 refining budget during, 145
performance. *See also* Earned Value
 Management (EVM)
 acknowledging good, 335
 analyzing schedule, 221–222
 collecting data on schedule, 223–224
 controlling project during, 347–348
 controlling project with assessments, 218
 defining data for tracking schedule, 220–221
 formalizing process of monitoring, 236–237
 improving accuracy of schedule data,
 224–225
 including in project-progress reports, 249
 motivating with assessments of, 263–264
 reporting, 264
 reporting in multiple-project
 environment, 288–289
 tracking, 211–212
 tracking schedule, 220–226
performance analysis summary, 323
performance measures, clarifying
 objectives with, 36
 performance period, reconfirming project
 plan in, 218
performance targets, clarifying objectives
 with, 36
performing stage, of relationships, 210
person effort. *See also* work effort
personal opinions, estimating risk with,
 157–158
personal position, as request incentive, 257
personal power
 ascribed versus achieved, 258–259
 defined, 256
 establishing bases of, 259–260
 understanding peoples' response to,
 257–258
Person-Loading Graphs, using, 131
personnel. *See also* team members
 acquiring appropriate, 205–206
 adding new to teams, 12
 describing needed, 123–124
 determining skills and knowledge of,
 118–122
 estimating need of with Human
 Resources Matrix, 122–123
 factoring efficiency into personal
 estimates, 128–131
 importance of planning initial allocations
 of, 131–133
 Linear Responsibility Chart defining
 participation in activities of, 191–193
 meeting established time constraints
 considering, 105
 possible risk factors of, 155
 personnel resource use, tracking, 212
 perspective, maintaining big pictured, 334
Planned Value (PV), 316
planning. *See also* project plan; Work
 Breakdown Structure (WBS)
 activities with no obvious breakpoints, 69
 dealing with repeating conditional
 activities, 67–69
 during define phase, 17–18
 hierarchical approach to, 63–67
 importance of detailed, 180
 importance of detailed approach to, 62–63
 importance of organized approach to, 61–62
 including assumptions regarding
 unknowns in, 44
 including limitations in, 43

- planning (*continued*)
 - initial resource allocations, 131–133
 - involvement of drivers, 54–56
 - involvement of observers, 57
 - involvement of supporters, 56–57
 - long-term projects, 70–71
 - in multiple-project environment, 281–284
 - for nonpersonnel resources, 139–141
 - for project conclusion, 266–267
 - as project management operation, 11
 - for similar activities in multiple-project environment, 289–290
 - successful meetings, 247
 - supporting with software, 297–298
 - value of Work Breakdown Structure to, 68
- PMI (Project Management Institute),
 - professional certification through, 310
- PMS (project management information system)
 - overview, 219
 - three parts of, 219–220
 - tracking schedule performance with, 220–226
- PMO (Project Management Office), sharing
 - new skills through, 313–314
- PMP Certification (PMD), 310
- post-project evaluation
 - conducting meeting for, 274–275
 - following up on, 275–276
 - laying groundwork for, 214
 - overview, 214, 270–271
 - preparing for, 271–272
 - preparing for meeting, 272–274
- power. *See also* personal power
- power bases, establishing, 259–260
- prayer approach, to risk, 163
- precedence diagramming approach, to
 - drawing network diagrams, 88–89
- precision, versus accuracy, 158
- primary capability, representing personnel, 119
- proactiveness
 - need for in success, 13
 - preparing for fight against, 13–14
- probability, expressing likelihood of risk
 - with, 157
- procedural requirements, determining
 - activity precedence using, 97
- processes
 - defining team, 208–209
 - importance of developing team, 206
 - of project management information system, 219
 - versus projects, 11
- product components, classifying activities
 - by, 71
- product support, as part of project
 - audience, 48
- productivity, factoring into required work
 - effort estimations, 125
- products, potential risk factor, 155
- professional certification, obtaining, 310
- professional societies, as part of project
 - audience, 48
- program
 - evaluating training content, 306–307
 - evaluating training presentation style and format, 307
 - versus project, 11
- progress Gantt charts, analyzing schedule
 - performance with, 222
- progress reviews, upper-management, 254
- project background, possible risk factors
 - of, 153
- project beneficiaries, identifying, 27–28
- project benefits, increasing commitment
 - by clarifying, 261–262
- project champions
 - confirming participation of, 204
 - identifying, 28
 - importance of including, 55
 - value in matrix structure, 180
- project charter, versus Statement of Work, 24
- project conclusion
 - administrative issues, 268
 - conducting post-project evaluation at, 270–276
 - importance of complete, 265–266
 - planning for, 266–267
 - providing team members transition for, 269–270

- reinforcing team focus/interest to, 267–268
- updating plans at, 267
- project control
 - avoiding scope creep, 241
 - establishing, 235–236
 - formalizing process of, 236–237
 - identifying corrective actions, 238–239
 - identifying problem causes, 237–238
 - maintaining, 347–348
 - monitoring expenditures, 232–235
 - monitoring schedules, 220–226
 - monitoring work effort, 226–230
 - overview, 217–219
 - as project management operation, 11
 - rebaselining for, 239
- project dashboard, using with written project-progress reports, 252–253
- project directors
 - common tasks of, 12–13
 - dealing with excuses, 13–14
 - as part of project audience, 47
 - self-evaluation questions for success, 21–22
- project leaders
 - common tasks of, 12–13
 - dealing with excuses, 13–14
 - as part of project audience, 47
 - self-evaluation questions for success, 21–22
- Project Management Body of Knowledge* (publisher, PMI), 310
- project management information system (PMIS)
 - overview, 219
 - three parts of, 219–220
 - tracking schedule performance with, 220–226
- Project Management Institute (PMI), professional certification through, 310
- Project Management Office (PMO), sharing new skills through, 313–314
- project management, understanding basics of, 11–12
- project managers
 - common tasks of, 12–13
 - dealing with excuses, 13–14
 - matrix structure responsibilities of, 176–177
 - as part of project audience, 47
 - self-evaluation questions for success, 21–22
- project meetings. *See* meetings
- project number, tracking performance with, 212
- project plan. *See also* planning
 - preparing, 345–347
 - reconfirming, 218
 - team members reviewing, 207
 - updating with closure activities, 267
- project portfolio management, understanding, 280–281
- project postmortem
 - conducting meeting for, 274–275
 - following up on, 275–276
 - overview, 270–271
 - preparing for, 271
 - preparing for meeting, 272–274
- project profile, versus Statement of Work, 24
- project request, versus Statement of Work, 24
- project-oriented organizations, requirements for success in, 169
- Project-Portfolio Management software, advantages of, 295
- project-progress reports
 - determining audience for, 249
 - elements of, 249–250
 - guidelines for writing, 250–251
 - overview, 248
 - using project dashboard with, 251–252
- projects
 - challenge of additional, 12
 - coordinating assignments across multiple, 136–137
 - life phases of, 14–19
 - understanding, 9–10
 - public, as part of project audience, 48
 - punishments, as request incentive, 257
 - purchases, following through process, 233
 - purpose
 - determining detailed, 329
 - identifying project, 26–33
 - on Statement of Work, 24

purpose statement
 including connection to organizational priorities in, 32
 information included on, 25
 PV (Planned Value), 316

• R •

ranges, setting targets within, 37
 rebaselining, for project control, 239
 recruiting, resolving skills/knowledge gaps with, 120
 regulators, as part of project audience, 47
 reinforcement, motivating with, 263–264
 relationships
 determining/evaluating activity, 97
 illustrating with Linear Responsibility Chart, 191–193
 importance of developing team, 206
 importance of team, 209
 improving team performance level with, 209–211
 reinforcing by supporting delegations of authority, 186–187
 relative likelihood of occurrence,
 expressing likelihood of risk with, 157
 reports
 analyzing expenditures with cost, 232
 analyzing schedule performance with combined activities and key-events, 221
 analyzing work effort expended with labor, 227
 creating schedules for, 213
 determining audience for project-progress, 249
 elements of project-progress, 249–250
 guidelines for writing project-progress, 250–251
 project-progress, 248
 using project dashboard with project-progress, 252–253
 using written, 245–246
 resource histogram, using, 131

resource matrix, for nonpersonnel resources, 140
 resources
 accomplishing activities with minimum, 181–182
 avoiding vague limitations around, 42
 determining characteristics of activity, 112–113
 formalizing commitments of in multiple-project environment, 285
 handling conflicting demands of in multiple-project environment, 283–284
 identifying nonpersonnel, 332
 importance of planning initial allocations of personnel, 131–133
 importance of planning needs for, 117
 limiting projects with, 41
 in multiple-project environment, 280
 planning for nonpersonnel, 139–141
 possible risk factors of, 155
 potential risk factor, 155
 resolving potential personnel overloads, 133–136
 respect, importance of, 334
 responsibility
 accountability for, 189
 accountability for accepting, 192–193
 versus authority, 182–183
 defining team members', 208
 delegating versus sharing, 183
 possible risk factors of, 154
 sharing, 188
 understanding concept of, 182
 restrictions
 identifying, 330
 meeting established time with schedules, 105
 possible risk factors of, 154
 on Statement of Work, 24
 results, limiting projects with, 41
 rewards
 motivating with, 264
 as request incentive, 257
 risk assessment questionnaires, using, 161

- risk factors
 - considering in multiple-project environment, 284
 - defined, 151
 - recognizing, 151–155
- risk management
 - defined, 150
 - developing strategies for, 162–163
 - identifying risks for, 161–162
 - including in project-progress reports, 249
- risk-management plan
 - defined, 165
 - preparing, 165–166
- risks
 - assessing in multiple-project environment, 284
 - communicating about, 164
 - defined, 150
 - determining, 332
 - estimating extent of consequences of, 159–161
 - estimating likelihood of, 156–159
 - identifying potential, 155–156
 - identifying while detailing activities, 80–81
 - minimizing delegating, 187
 - monitoring activities with high, 223
 - of performing activities faster, 108
 - steps for
 - determining/evaluating/managing, 150
 - transferring, 163
- roles
 - defining team member, 208
 - differentiating in multiple-project environment, 282–283
 - importance of developing team, 206
 - possible risk factors of, 154
 - specifying in multiple-project environment, 286
- rolling-wave approach, to planning long-term projects, 70–71
- rules, for drawing/interpreting network diagrams, 90–91
- S •
 - schedule achievement, tracking, 212
 - schedule variance
 - defined, 316
 - determining reasons for, 320
 - mathematically defined, 317
 - schedule variance percentage (SVP), determining, 317
 - schedules
 - analyzing performance of, 221–222
 - backing in to, 104
 - collecting performance data on, 223–224
 - creating for multiple-project environment, 287–288
 - creating for reports and meetings, 213
 - defining data for tracking performance of, 220–221
 - displaying, 115–116
 - improving accuracy of performance data of, 224–225
 - initial development steps for, 103–104
 - meeting established time constraints using, 105
 - performing simultaneous activities to shorten, 106–109
 - planning to shorten, 106
 - possible risk factors of, 154–155
 - preparing detailed activity, 331–332
 - revising strategies to shorten, 109–110
 - selecting tracking system for, 225–226
 - subdividing activities to shorten, 110–111
 - tracking performance of, 220–226
 - scope creep, controlling, 241
 - scope, possible risk factors of, 154
 - Scope Statement, clarifying, 34–35. *See also* Statement of Work (SOW)
 - secondary capability, representing personnel, 119
 - sequence, determining project time required with, 86
 - sharing, responsibility, 183, 188
 - shortcuts, avoiding through life phases, 20–21

- skills
 - applying new, 311–312
 - determining people's, 118–122
 - improving through formal training, 306–309
 - improving through professional certification, 310
 - improving with mentor, 309–310
 - sharing new, 312–314
 - Skills Rosters
 - creating, 120–121
 - determining people's skills and knowledge with, 118–119
 - reconciling supervisor versus personnel perspective over, 121–122
 - slack time
 - defined, 91
 - determining with backward pass, 94–96
 - SMART objectives, 38
 - software
 - integrated project-management, 98
 - integrating into project operations, 299
 - limitations of, 292
 - Project-Portfolio Management, 295
 - selecting integrated project-management, 296
 - stand-alone, specialty versus integrated project-management, 292–297
 - using to help manage project's, 297–298
 - SOW. *See also* Statement of Work
 - span time. *See also* duration
 - estimating activity, 111–114
 - improving estimates of activity, 114–115
 - meeting established time constraints
 - considering, 105
 - as network diagram element, 87
 - versus work effort, 123
 - specificity, creating accountability with, 190
 - spreadsheet software, uses of, 293
 - stakeholders, as part of project audience, 46
 - stand-alone, specialty software, versus integrated project-management software, 292–297. *See also* software
 - start phase
 - avoiding mistakes during, 20
 - communicating about risk during, 164
 - overview, 18–19
 - possible risk factors during, 152
 - preparing for post-project evaluation
 - during, 271–272
 - refining budget during, 145
 - Statement of Work (SOW)
 - including limitations in, 43
 - including strategy on, 35
 - in multiple-project environment, 282
 - overview, 23–25
 - storming stage, of relationships, 210
 - strategies
 - developing risk-management, 162–163
 - to eliminate overcommitment, 134–136
 - finding to meet expectations, 36
 - guidelines for selecting appropriate, 35
 - including in risk-management plan, 166
 - meeting established time constraints
 - considering, 105
 - possible risk factors of, 154
 - strong matrix, defined, 170–171
 - success
 - finding through commitment, 258–259
 - proactiveness for, 13
 - understanding project's measure of, 30
 - summary usage chart, for nonpersonnel resources, 141
 - suppliers, as part of project audience, 47
 - support groups, as part of project audience, 48
 - supporters
 - agreeing on project objectives, 38
 - categorizing, 330
 - communicating about risk to, 164
 - confirming participation of, 204
 - versus drivers, 27
 - identifying in audience, 53–54
 - maintaining involvement of, 57–59
 - planning involvement of, 56–57
 - SVP (schedule variance percentage), determining, 317
- T ●
- tasks, common project manager, 12–13
 - team identity, importance of
 - creating/maintaining, 179
 - team meetings, 251–254

- team members. *See also* personnel
acquiring appropriate personnel for, 205–206
assigning work to, 332
confirming project participation of, 202–204
creating/maintaining motivation, 260–264
defining roles of, 208
formalizing commitments of in multiple-project environment, 285
matrix structure responsibilities of, 177
in multiple-project environment, 279
as part of project audience, 46
providing project conclusion transition for, 269–270
reinforcing focus/interest to project conclusion, 267–268
reviewing project plan, 207
- teams
adding new people to, 12
creating accountability to, 190
creating in multiple-project environment, 286
defining operating processes of, 208–209
defining/sharing roles and responsibilities with Linear Responsibility Chart, 191–193
developing goals for, 207
importance of relationships within, 209
improving performance level with relationships, 209–211
overview, 206
supporting virtual with communication technology, 303–304
- technology. *See also* software possibilities of, 291
sharing new skills through intranet, 313
supporting virtual teams with communication, 303–304
using e-mail, 299–302
- templates
creating audience lists, 52–53
using Work Breakdown Structure, 79–80
- time. *See also* duration; span time
- time frames
avoiding vague limitations around, 42
limiting projects with, 41
- time logs, collecting work effort data with, 228
- time sheets, collecting work effort data with, 227–228
- top-down approach
developing budgets with, 147
to developing Work Breakdown Structure, 72, 73
- tracking
expenditures, 230–235
importance of close, 70
schedule performance, 220–226
work effort, 226–230
- tracking systems
selecting expenditure, 234–235
selecting schedule, 225–226
selecting work effort, 229–230
selecting/preparing, 211–212
- trade-off, of performing activities quickly, 108
- traditional approach, to drawing network diagrams, 89
- training
improving skills/knowledge with formal, 306–309
professional certification, 310
resolving skills/knowledge weaknesses with, 120
working with mentors, 309–310
- transition, providing for team members, 269–270
- u •
- unknown, dealing with, 80–81
- updating, Linear Responsibility Charts, 198
- upper management
establishing oversight committee, 180
matrix structure responsibilities of, 178
as part of project audience, 47
- upper-management progress reviews, guidelines for, 254
- usage charts, 141
- users, identifying project products and services, 28–29

• U •

variances

- cost, 316
- determining reasons for, 320
- identifying causes of, 237–238
- identifying corrective actions for, 238–239
- mathematically defining cost and schedule, 317
- schedule, 316

vendors, as part of project audience, 47

- virtual project teams, supporting with communication technology, 303–304
- vocabulary, new e-mail, 301

• W •

WBS. *See also* Work Breakdown Structure

weak matrix, 170

weekly time sheets, collecting work effort data with, 227–228

“why” person, importance of being, 333

word processing software, uses of, 293

work

- clarifying with action verbs, 66–67
- describing on work-order agreement, 203
- determining major pieces of project, 64
- dividing pieces into component parts, 64–65
- identifying, 331

Work Breakdown Structure (WBS)

- approaches to developing, 72–74
- considering various hierarchical schemes while developing, 74–75
- creating dictionary for, 81–82
- developing with hierarchical approach, 63–67

different hierarchical schemes for

classifying activities in, 71–72

display format options for, 76–78

guidelines for improving quality of, 78

identifying risks in, 80–81

labeling entries, 75–76

in multiple-project environment, 282

understanding value of, 68

using templates for, 79–80

work effort

analyzing expended, 226–227

collecting data for, 227–228

considering productivity, efficiency, and availability information for, 125–126

estimating required, 124–125

improving accuracy of data on, 228–229

measuring, 123

selecting tracking systems for, 229–230

versus span time, 87

work order, versus Statement of Work, 24

work packages, possible risk factors of, 154

Work-Order Agreements

confirming team members’ participation with, 203–204

preparing for multiple-project environment, 285

writing

guidelines for project-progress reports, 250–251

Linear Responsibility Charts, 197

plans, 18

written agreements, creating

accountability with, 190

written reports, using, 245–246