

The Business Value of Embracing A Unified PM Methodology

An IIL Business Brief by George Pitagorsky, PMP

What is the value to an organization of embracing a common project management approach? Why is a common process, a methodology, an essential part of PM improvement? What is the best way to manage the organization change required to implement the common PM standards and procedures that make up the PM methodology?

Projects Are Mission Critical

Project management (PM) is a mission critical process. PM methodology is a means to improve performance. It is a recognized priority in organizations as diverse as the US Army Corps of Engineers, financial service organizations, pharmaceutical firms, global manufacturers, and contractors in virtually every industry

Why is PM mission critical? Simple - effective projects create all new products and improvements, implement process and quality improvement, lead to complex sales and sales fulfillment, effect mergers and acquisitions, etc. In short, every activity that creates change in an organization is a project.

The Need for PM Methodology

It is widely accepted that when a process is described in common terms, and is repeatable and managed, performance quality is higher and more consistent. The Software Engineering Institute in its Capability Maturity Model, Dr. H. Kerzner's PM Maturity Model, ISO, IEEE and many others, are clear evidence of the need for methodology.

Repeatability and continuous improvement rely on the formal definition of the process' objectives, and the way it is to be performed. A PM methodology (PMM) is a knowledge base containing guidelines, standards, procedures, tools and techniques for accomplishing project management. While there is no PM cookbook, the methodology tells its users what to do, when and how to do it. It includes what documents to create, checklists to use, etc. and makes roles and responsibilities clear. It permits the collection of useful information regarding projects and their performance to give decision makers the basis for effective project portfolio management decisions.

An enterprise-wide view recognizes that in most instances projects are cross-functional, effecting multiple organization units. Further, the simultaneous performance of multiple projects increases the risk of unforeseen impact in the organization. A single project management methodology is a prerequisite for PM effectiveness.

The Need for Flexibility within Structure - No Bureaucracy

The idea of a single methodology for all projects often strikes fear in the hearts of both project managers and executives. They get visions of a bureaucratic nightmare in which it takes more time and effort to manage projects than it does to perform them. This must be avoided. It is avoided when the organization takes a practical and rational approach to PM methodology - minimal must-haves, best practices, and accountability.

There are many kinds of projects - facilities, new product development, procedural change, IT, etc. Each of these has a unique set of performance requirements, different standard work breakdown structures, different templates, checklists and document outlines and different project life cycle models. There is need for a project

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management methodology that applies to all projects within the enterprise, while permitting each kind of project to be performed in accordance to its needs. Further, the PMM must be scalable to make it practical for large, medium and small projects. A methodology must be customizable to the specific needs of the using environment.

Consistency at Levels of Detail

An effective PM methodology is one that recognizes the need for consistency at several levels of detail. At the highest level there are the needs of the executives who make project portfolio management and other strategic decisions. They need consistent decision packages to evaluate, compare and decide upon the initiation or continuation of projects. They need consistency in the status reports from multiple projects, so they can quickly and easily see what is going on at a macro level with the ability to get down into the details, if they want to.

At the multi-project and program manager level, having consistent plans, documents, reports and procedures makes their job easier, makes transfer of resources across projects easier, shortens learning curves and enables managers to fulfill the information needs of the people they report to. At this multi-project level, methodology enables continuous improvement through ongoing critical process reviews at the end of individual projects and for groups of projects performed over time.

At the project manager, team leader and performer levels the availability of clear and flexible templates, techniques, tools and definitions, based on best practices, makes for greater efficiency. At this level, common process means not having to reinvent the wheel.

How to Implement a PM Methodology

Implementation of a PMM is an organization change. Though counter intuitive, often the fastest and most effective way to begin the change to a uniform methodology is by establishing PMM as an easy to use, preferred guideline rather than mandating compliance. This makes use of the PMM as a means for educating the enterprise and establishing a common language as a step towards a more formal implementation, with compliance monitoring.

The organization needs tools to deliver the methodology to people at their desks, when they need guidelines, templates, examples and the other methodology components. Methodology tools must be fully integrated into the PM tools set.

It is important to recognize that that there is already a process in place (though it may not be documented). There may be very good examples of PM documents, procedures, etc. Using current best practices and merging them into externally sourced or newly developed methodology helps to gain acceptance. Why reinvent when you can reuse?

In many settings, the first level of "must have" requirements is in support of senior management needs. For example, standards are set for phase-end documents and for verification and Go/No Go decision making. PM's can "get there" any way they choose (hopefully using best practice guidelines). This makes initial steps into common methodology quick by side-stepping resistance and creates a top down drive change process.

In any case, it is important to recognize that the implementation of methodology changes the degree of freedom of choice for PMs and project performers. It reinforces the idea that while there are many good approaches, there are best practices. Change is pushed from above and below by promoting consistent use of best practices to enable continuously improving performance.



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