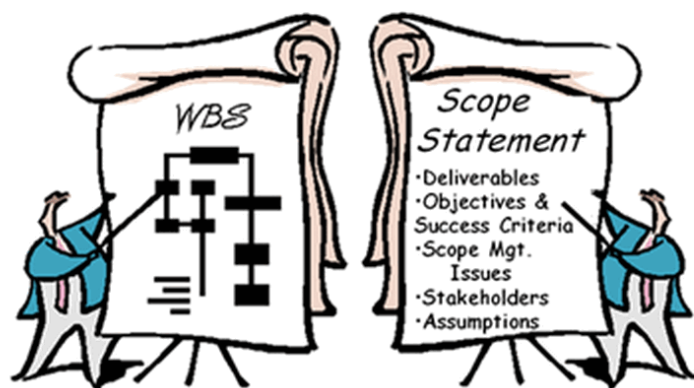


The Project Management Minimalist:

*Just Enough PM
to Rock Your Projects!*

(2nd Edition)



By Michael Greer

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Michael Greer

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NOTE: This e-book is also available in these forms:

- **Amazon's Kindle:** <http://www.amazon.com/Project-Management-Minimalist-Projects-ebook/dp/B004J17298>
- **Barne's & Noble Nook:** [coming soon!]

Please check the book's info page at *Michael Greer's PM Resources* website for all the latest: http://michaelgreer.biz/?page_id=636

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Dedication

This book is dedicated to all the clients who in the last 25 years or so have invited me into their organizations to teach my customized project management (PM) basics workshops. **From them I learned this key lesson which every “PM expert” needs to know: Enough is enough... especially when you’re talking PM!**

Every once in a while, when I rolled out my big collection of cosmic and sometimes complex PM tools and processes, there were people in the group who “pushed back” with their common sense and proved to me that **leaner is always better!** As the years have gone by, I have become convinced that **there are really just a handful of important PM tools, artifacts, and processes that matter** -- and that many of the more esoteric procedures that the PM consultants and experts push at PM newbies are more trouble than they’re worth!

So to you, my courageous and sometimes cantankerous clients, I truly owe my gratitude. You helped me cut through the heaps of PM jargon and esoterica and find the essences of true PM minimalism. I hope this little book accurately reflects the lessons you have taught me.

Acknowledgements

Many of the tools in this e-book originally appeared in my **HRD Press** book, *The Project Manager’s Partner, 2nd edition (2001)*. In fact, that book contains over 57 tools, guidelines, and worksheets for project managers.

I’d like to acknowledge the effort of all those at HRD Press who helped me build and who currently sell and distribute the Partner. It is a most comprehensive collection of PM tools and processes. And I am proud to have created it. The PM minimalist approach advocated here would simply not have been possible without my earlier work on the Partner. For more information about the Partner, see this page at my website:

- **The Project Manager’s Partner, 2nd Edition** -- <http://michaelgreer.biz/?p=208>

The third part of this book owes its existence to the inspiration of **Brian Johnson**, the creator of **PhilosophersNotes**. After many months of listening to Brian’s 20-minute audio distillations of “The Biggest Ideas from 100 of The Most Influential Books On Personal Growth” I was transformed. And I began my quest to “pay forward” Brian’s gifts to me by attempting to share similar wisdom in the realm of project management. This led to my **Inspired Project Teams** blog and podcasts, 10 of which make up the second part of this book. Brian’s genius, and more importantly his infectious enthusiasm for all things that are growth-oriented, should be experienced by everyone! So go to **PhilosophersNotes** and “get your wisdom on!” (<http://www.philosophersnotes.com/>)
-- Michael Greer

Introduction

“Who you jivin’ with that cosmic debris?” – Frank Zappa

Project management (PM) is not rocket science! And, despite what many PM “experts” would like you to believe, it’s fairly easy for anyone to learn to use a few basic PM tools and processes to assure that projects are well-organized and completed on time, on budget, and with excellent results.

Unfortunately, a vast army of consultants and writers, encouraged by professional associations and their certifying bodies, have puffed up the practice of PM so that it appears to be much more complex than it really is. But just think about it! Every day millions of people all over the world work on do-it-yourself home improvement projects, organize events for their local community service groups, complete work-related projects assigned by their supervisors, and so on. And the vast majority of these people have likely had no formal PM training. Yet somehow they get results using only their common sense and specific knowledge of the problem they are trying to solve. So **a strong case can be made that extensive PM training and certification is a “nice to have,” not a “need to have.”**

On the other hand, I know that when smart people who have had no formal PM training are given a few key PM tools and coaching, they really thrive. In several decades of teaching PM Basics to professionals in many different fields I’ve learned that **when a PM newbie combines deep knowledge of her profession with a few simple PM tools and techniques, amazing things begin to happen!** Her unique intuition and judgment, merged with a little PM discipline, can produce robust project plans and powerful PM results.

My purpose here is to cut through the jungle of broad PM theory and sometimes-arcane PM practices and help you acquire “just enough” PM discipline to get good results in your projects – without heaping on a bunch of burdensome PM stuff that can bury your projects in administrivia and smother the joy out of them.

I hope you find this book to be useful. And I hope that you carefully, assertively pick and choose from it “just enough” PM tools to help you thrive in your role as project manager.

-- MG

PM Minimalist Values: A Framework for Rethinking PM

“Any intelligent fool can make things bigger, more complex, and more violent. It takes a touch of genius – and a lot of courage – to move in the opposite direction.” – E.F. Schumacher

“Besides the noble art of getting things done, there is the noble art of leaving things undone. The wisdom of life consists in the elimination of non-essentials”. – Lin Yutang

“Simplicity is the ultimate sophistication.” – Leonardo DaVinci

“Everything should be made as simple as possible, but not simpler.” – Albert Einstein

Project Management (PM) Minimalism is the practice of doing “just enough” PM to get the job done, and no more.

The PM Minimalist Values summarized below may be applied to any project in any industry or professional practice.

Practicing PM Minimalism takes courage and judgment! You’re going to have to decide what “just enough” PM is for your particular project. Later in this e-book you’ll find plenty of lean, simple, and professional-level PM tools and guidelines. And when applied to most projects, these tools and guidelines prove to be quite valuable. But remember:

You should reject or ignore any PM tools or recommended practices that won’t help your project team or that make your project too complex or bloated.

The PM Minimalist Values⁺⁺

Use these Values to help you decide what constitutes “just enough” PM for your project.

- Create fewer deliverables with fewer features.
- Do less work.
- Absorb or neutralize (but don’t ignore) anyone who can reject or rethink your deliverables.
- Work as fast as quality permits – maybe faster!
- Deliver something – anything – as soon as possible.
- “Make it real” as often as possible with models, mock-ups, prototypes, & samples.
- Revise or reject something as soon as possible.
- Give up on the project earlier; cut your losses.
- Ignore external-to-the-project “professionals” who would have you puff up the project or its work processes.
- Enjoy creating; don’t put up with simply slogging through.

⁺⁺ (For a full explanation of each of these values, see **“PM Minimalist Values Explained”** at the end of this book.)

Overview of this Book

This book is organized into four main parts.

Quick Start Checklist: The Absolute Least You Can Do!

- [A one-page checklist, lean and to-the-point.](#)
- ***Start with this to organize and manage your first project. You may not need anything else!***

The Nuts and Bolts: 10 Steps to Project Success

This part of the book provides tools to help you perform these essential PM steps:

- [Step 1: Define the project concept, then get support and approval.](#)
- [Step 2: Get your team together and start the project.](#)
- [Step 3: Figure out exactly what the finished work products will be.](#)
- [Step 4: Figure out what you need to do to complete the work products. \(Identify tasks and phases.\)](#)
- [Step 5: Estimate time, effort, and resources.](#)
- [Step 6: Build a schedule.](#)
- [Step 7: Estimate the costs.](#)
- [Step 8: Keep the project moving.](#)
- [Step 9: Handle scope changes.](#)
- [Step 10: Close out phases, close out the project.](#)

The People Stuff: 10 Sets of Challenges to Inspire Project Teams

This part will help you inspire and motivate your project team. It provides inspirational quotes, thoughts, and specific challenges for you and your team. Here are the topics:

- [Trust Your Judgment](#)
- [Let Go of Perfectionism](#)
- [Celebrate the Chaos Within](#)
- [Embrace the Work Itself](#)
- [Take the Risk](#)
- [Just Say No](#)
- [Listen, Understand, Collaborate](#)
- [Just Do It!](#)
- [Consciously Choose Your Attitude](#)
- [Be the Change You Want to See](#)

Taking Care of Yourself: Managing Your Priorities, Time & Energy

This part of the book gets personal. It provides a bit of a pep talk and some specific guidelines to help you manage your priorities, time and energy. Broad topics include:

- [Back to Basics: Manage Your Energy](#)

The Project Management Minimalist: Just Enough PM to Rock Your Projects!

- [Leverage Your Signature Strengths](#)
- [Manage Your Time](#)
- [Understand and Manage Your Stress](#)

Quick Start Checklist: The Absolute Least You Can Do!

Get your project rolling quickly, with Minimum effort, by doing these Minimum chores. If you want to expand any of these chores or get more information about them, see the suggested Step in “The Nuts and Bolts...” section of this e-book.

- **Mini-Charter:** Write a one paragraph description of your project’s tangible finished product. Get this reviewed & approved by your boss or customer.
(See Step 1: Define the project concept, then get support and approval.)
- **Team:** Get together everyone who’ll help build the finished product, who’ll use it, or who might cause trouble or force it to be changed if they don’t like it.
(See Step 2: Get your team together and start the project.)
- **Go wide:** Working as a team, brainstorm to create a “wide view” list of “wished for” deliverables. (Pretend you could build anything on this list.)
(See Step 3: Figure out exactly what the finished work products will be.)
- **Slash & Burn:** Working as a team, divide the “wide view” list of deliverables into three equal-sized lists: 1) Those we “must build,” 2) Those we “could build,” and 3) Those we “can wait to build.”
(See Step 3: Figure out exactly what the finished work products will be.)
- **The To-Do/Assignment List:** Working as a team, list the tasks required to create the “must build” items and assign these tasks to specific people.
(See Step 4: Figure out what to do...& Step 2 [Responsibility/Acct. Matrix].)
- **The Schedule:** Still working as a team, make your “best guess” about how long it will take to complete each task. Then, referring to a calendar, make a schedule. Include each task, specific deadlines, dates, and the names of people assigned to each task. **(CAUTION: If your project schedule exceeds 1 month, try to break it into a series of smaller projects. Smaller projects are more likely to succeed.)**
(See Step 5: Estimate time, effort, resources & Step 6: Build a schedule.)
- **Get started:** Do the tasks as described in the schedule.
(See Steps 8: Keep ... moving, 9: Handle scope changes, & 10: Close out...)
- **Inspect and correct.** While the project is under way, find out:
 - Are “must build” items on time?
 - Are “must build” items of high enough quality?
 - Is everyone doing what they promised?
 - Do people need more help or need to have obstacles removed?
 - What must we correct or change to finish the project on time?
(See Steps 8: Keep ... moving, 9: Handle scope changes, & 10: Close out...)
- **Post Mortem & Lessons Learned:** When the project is over, look back & figure out how you could have improved it. List Lessons Learned, then use them to make you next project better.
(See Step 10: Close out phases, close out the project.)

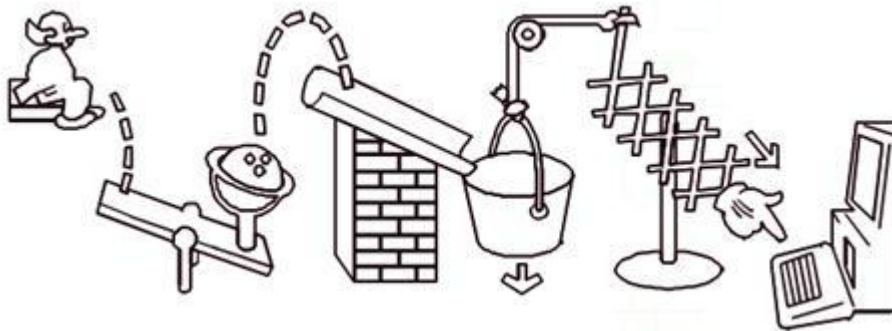
Did the above PM process & tools work OK? If not, adjust for your next project by: 1) dropping some chores, or 2) changing/adding some processes or tools.

The Nuts and Bolts: 10 Steps to Project Success

In this part of the book, we introduce important PM tools and practices that will help you get results by completing each of the 10 Steps to Project Success.

Each Step is divided into these sections:

- **Overview** – An introduction to what’s going on in the Step.
- **Results** – The end product of the Step.
- **Process** – The specific actions to take to complete the Step.
- **The Minimalist Squeeze** – After you’ve worked the process for this Step, make a final pass and give it a “Minimalist Squeeze” to shrink it as much as possible.
- **Tool, Worksheet, Guidelines, Samples, etc.** – Things you can use to help you complete the step and get top-quality results.



Step 1: Define the project concept, then get support and approval.

Overview

In this step you need to **define the project concept clearly enough so that you can get support from key people in your organization.** You do not need to come up with a detailed plan at this point. But you do need to get preliminary (and formal) support for the project.

In sales terms, you are “qualifying the buyer,” then trying to close the sale. That is, you are testing the waters with a preliminary, broad-brush description of the project so that you can:

- Find out if **anyone** else is likely to support your work or is willing to help you do the work.
- Obtain a project champion or sponsor.
- Find a source (or several sources) of project resources (such as people, equipment, and money) needed to help you complete the project.
- Get your project formally approved and funded.

Results

This Step should result in the following:

- A series of conversations, brainstorming sessions, and other formal or informal discussions about the project concept with your supervisor and key people whom you hope will provide project support
- An approved Project Charter



Process

1. Figure out if the project is needed. That is, find out if it supports a:
Market demand

- Business or strategic initiative
 - Customer request
 - Technological advance
 - Legal requirement
 - Other important organizational initiative
2. Create a Project Charter that:
 - Formally recognizes the existence of the project
 - Is supported by a manager external to the project and at a high enough organizational level to support project needs (i.e., a sponsor* who can help the project team acquire the resources* they need – people, equipment, facilities, funding, etc.)
 - Authorizes the project manager to apply organizational resources (people, equipment, materials) to project activities
 3. Get the Project Charter approved (physically signed) by a project sponsor.

Note: If you can't get your Charter formally approved, then you should abandon the project -- plain and simple. In fact, in many organizations the Charter is established as a formal “approval gate” which allows senior managers to sort out and eliminate lower-priority projects. This sorting process not only saves the organization money by focusing energy only on high-priority projects, but it can help prevent the burn-out that results when people are assigned to too many projects or when people find themselves “swimming upstream” on projects that aren't really valuable enough to win the support they need to succeed

The Minimalist Squeeze

1. Got your Project Charter approved? Great! Now, without consulting your sponsor, give it a quick review and ask yourself :
 - What's the smallest chunk of this project we might be able to complete easily in the next two weeks? ... the next month?
2. Resolve that when you get your team together in Step 2, you will ask them to help you design your project as a collection of short, doable mini-projects, beginning with that first chunk you identified above.
3. Make some notes so you can share your “small chunk” ideas with the team.
4. Benefits of small projects:
 - Planning is more accurate when you are looking ahead only a few weeks.
 - Allows you to “change your mind” without such dire consequences.
 - Opportunity to fail sooner means less is lost (fewer labor hours, fewer dollars, fewer “heart” and team effort.)
 - Allows the team to “come up for air” and get closure more often instead of spending month on end in the trenches laboring toward a distant goal.
 - Allows frequent celebrations of milestones (keeping the team motivated).

* The asterisk (*) beside this (or any) PM term means that you will find a full definition of it in the **“[Glossary of Terms Used](#)”** at the end of this book.

Worksheet: The Project Charter

Project Name:

Date:

Project Manager:

Project Tracking Number:

Project Justification (problem or opportunity addressed):

Overview of Deliverables (high-level, broad-brush only—provide details, if any, in appendices**):

Specific Project Objectives & Success Criteria (schedule, cost, quality):

Primary Stakeholders & Roles (including broad statement of roles and responsibilities of all customers, sponsors, contributors, reviewers, managers, sign-off authorities, project manager, etc.):

Key Assumptions (including broad statement of sponsor/stakeholder inputs and resources to be provided, as well as a delineation of “what’s outside” project scope):

Signatures—The following people agree that the above information is accurate:

- Project team members:

- Project sponsor and/or authorizing manager(s):

** Appendices (Needs Analysis/Feasibility Study Notes, Detailed Work Breakdown Structure, Preliminary Schedule, Preliminary Cost Estimate, Sample Deliverables, Background Memos/Reports, Organization Chart of Project Team, others as needed).

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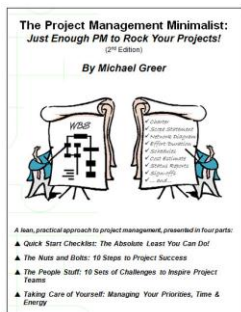
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