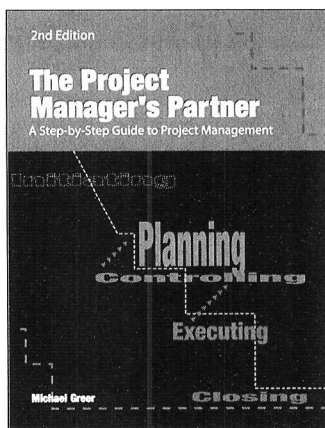


For the Bookshelf



David Bentley, CCE

The Project Manager's Partner - A Step by Step Guide to Project Management



The Project Manager's Partner, A Step by Step Guide to Project Management, by Michael Greer, 2002, AMACOM, ISBN 0874256100

In this handbook, Michael Greer presents an overview to generally recognized industry standard project management terminology and concepts, which should be especially relevant for new or part-time project managers.

Greer does a good job to explain that this book is not detailed enough for a project manager tasked with a major project, such as a billion dollar construction project or landing a spacecraft on Mars. Rather, it is for those individuals with training in other fields such as accounting, engineering, or other specialties that are now challenged to produce a project, which achieved high quality results, on time and within budget. That being said, knowledge can sometimes reach a level of sophistication at which the individual can lose the simplicity of its underpinnings. For this reason, many performance professionals recommend that practitioners periodically review topics in which they are proficient, to prevent their perspectives from becoming stale. To that end, this book is a good resource, even for experts.

Greer divides this book into three main sections, each a distinct treatment of topics and tools. The introduction and part I of the book, entitled, *Your Deliverables, Phases, and Project Life Cycle*, goes into detail to explain such rudimentary concepts such as functional vs. matrix organizational structures, general vs. project managers skill sets, project life cycles, and essential project actions. While simplistic, I liked the way Greer cautioned young managers to guard against using the unconscious habits of highly skilled and effective project managers that don't appear to be following a "success script," but continuously produce successful projects. Instead, he recommends that budding managers practice each step and process, ensuring closure/sign-off of each step, taking nothing for granted, which should lead to a successful project completion.

The handbook wraps up part I with a worksheet called, *My Unique Project Life Cycle*, enabling the project manager to create his or her own custom-tailored project life cycle based on typical project phases and activities. Thinking back to my own experiences as a young project manager, I wished that I had something like this as a guide. I'm sure my learning curve would have been much shorter.

Part II of the book is entitled, *Your Essential Project Actions*,

and it provides an opportunity for the project manager to develop actions given the project-specific deliverables and phases identified in Part I. Greer points out that all projects have five generic processes. These include the following.

- **Initiating**—authorizing the project and gaining commitment;
- **Planning**—determining the scope, activities, resources, schedule, and costs and creating essential and discretionary plans
- **Executing**—implementing the plans, developing the team, distributing information, contracting, etc.;
- **Controlling**—comparing actual to planned performance; and
- **Closing**—verifying scope, administrative items, and closing the contract.

Since every project will have these five processes, Greer developed a worksheet delineating the five, along with a list of actions that a project manager should take in order to complete a project successfully. I found the worksheet extremely valuable primarily because of a column entitled, "*Results of Successful Performance*" related to an action item. For example, one of the action items under planning is to close out the project planning phase. Under result, Greer points out that a successful project plan will be approved, in writing, by the project sponsor. I readily concur with this action item and personally see too many projects that do not have written approval, causing rework later.

Part III of the book entitled, *Your Project Management Action Items*, provides specific action items to work through each of the five phases identified in Part II. Experienced project managers will find Part III the real "heart" of this book. The beauty of this section is that it was not written in isolation from the earlier chapters. It works through each of the five processes (initiating, planning, executing, controlling, and closing) and outlines real-world tools and techniques for accomplishing project goals.

Each action item description contains an assignment, desired outputs, background information, worksheet, and/or guidelines, actions a veteran project manager might take, pitfalls and cautions, and a resource for more information. Because of my guru standing as a project manager, my eyes gravitated to the sections regarding, "what a veteran project manager might do," to see if I could learn anything or simply gloat that I already knew that. I immediately decided that the evaluating project scope action item would be my test, since I believe that many problem projects have an ill-defined scope. Also, I am currently trying to write a book called, "**How to Identify Problem Projects Early**" based on my eight years as a Big 5 consultant and one of my key findings was scope development and sign-off is a major problem

in our industry. While I was pleased to see Greer's suggestions that a veteran manager might enlist expert support, conduct product analysis, conduct benefit-cost analysis, and identify alternatives as methods to combat poor scope, I felt somewhat cheated by the write-up. Fortunately, I kept reading and found the details contained under the "Pitfalls and Cautions" section of each action item to calm my fears. In fact, for experienced project managers, especially PMP's, I would highly recommend skimming most of Part III, but honing in on the veteran manager and pitfalls sections. To Greer's credit, he continually encourages project managers at all levels of experience to seek advice and networking opportunities. He also includes a resource in each tool's summary so that the reader can seek out additional information. The text description in Part III can seem complicated, but it is reinforced by graphic figures and tables that drives the information home, especially to the visual learner.

Many readers merely skim the appendix of a book or ignore it completely. I strongly encourage anyone who reads this handbook to more than skim this segment. It contains a wealth of information, including: tips for managing experts outside of your expertise, a glossary of project management terms, a summary of key project manager actions and results, potential shortcuts for low-risk projects, guidelines for deciding when to kill a project, how to take charge of your project management software and selected project manager resources, such as PM-oriented websites and publications. Again, Greer provides us with tables and user-friendly advice that will not only broaden our knowledge of project management, but also help us interact and talk intelligently with others during the process.

The Project Manager's Partner is designed so that it can "stand alone" and be of immediate value to novice project managers. The tools may be used out-of-sequence, so project managers need not read through the entire book to apply a tool. For example, if you are involved in developing a schedule, you may

simply turn to the tool which deals with developing a schedule and get right to work. I believe most project managers will find this handbook to be an excellent resource with forms, checklists, and practical applications. However, it does not provide the depth of information needed for those hard-to-handle projects. For instance, the handbook gives some excellent aids for cost-estimating and budgeting, but it does not address in great detail the negotiation steps or actions required to obtain critical cash flow when schedules change. Also, Greer includes many essential tools for taking those first steps and for making plans, but he does not address overcoming the all too common unforeseen obstacles.

In summary, from a people perspective, project management can be a rewarding and developmental experience or a downward slide into confusion and panic. In most of today's organizations, project managers are not professionals in this discipline, rather they accept this responsibility along with their normal job duties. Therefore, having this basic handbook as a resource can save hours of rework and avoid countless "lessons learned" meetings to discover what went wrong. I highly recommend it. ♦

About the Reviewer

David Bentley is the president of Bentley Management Group LLC, a company started in 2000 to provide project management and construction consulting services to the building industry. Mr. Bentley is a Certified Cost Engineer (not currently active). Prior to running his own company, Mr. Bentley was employed by such notable firms as Fluor, Morrison-Knudsen, Aramco Services, Parsons-Brinckerhoff, PriceWaterhouseCoopers, and Ernst & Young as a cost engineer, project engineer, construction manager, and project manager.

AACE International Specialty Certification Update— Planning and Scheduling Professional (PSP)

AACE International is developing the Planning and Scheduling Professional (PSP) certification designation to provide a method to credential professionals with knowledge and expertise in these disciplines. This unique program will distinguish professional planners and schedulers as having the abilities to pass a rigorous exam aimed to show their capabilities.

The creation of this first-of-its-kind certification program was revealed in June, 2003. The first examination is scheduled in conjunction with the 2004 AACE International Annual Meeting, June 13-16, 2004, at the Omni Shoreham Hotel in Washington, DC.

Michael C. Ray, PE, CCE, President of Legis Consultancy Inc., of Atlanta, GA, is leading the task force by serving as Task Force Project Manager. Vera A. Lovejoy, CCC, is the co-chair; Other members of the PSP task force include: Abhimaynyu Basu PE; Jennifer Bates, CCE (Technical Board Representative); Ozzie F. Belcher (AACE International President); Thomas W. Burns Jr.; Ron. F. Cagle; Timothy T. Calvey, PE; Kymberli Coffman, CCE (Certification Board Representative); Edward E. Douglas III, CCC; Dr. John O. Evans III; Clive D. Francis, CCC (AACE International President-Elect); Lee J. Hobb; Kenji P. Hoshino; Marlene M. Hyde, CCE; Nicholas L. Kellar, CCC (Certification Board Representative); Gilbert A. Laterza; Paul E. Makris; Donald F. McDonald Jr., PE, CCE (Education Board

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For more than a quarter of a century, AACE International has defined new levels of professionalism through rigorous certification programs for cost and management professionals providing the Certified Cost Consultant (CCC) and Certified Cost Engineer (CCE) professional designations. AACE International also has an Interim Cost Consultant (ICC) certification for those new to the profession. AACE's CCC, CCE, and ICC designations represent the standard of excellence in today's cost and management industry.

For additional information on AACE International, its certification programs, or to participate in development of this work, please visit our website at www.aacci.org or contact AACE International Headquarters at 800-858-COST or 304-296-8444.