

Simplifying Project Management: Six Power Tips for Doing More with Less

By Jerry Manas, PMP

Albert Einstein said, “Any 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.” The same can be said for project management processes. All too often, organizations create an overabundance of complexity; try to implement huge, unwieldy methodologies; and futilely attempt to ensure compliance. Yet they miss the boat by diluting their efforts trying to standardize everything, to the detriment of the few vitally important things that matter.

There is true power in simplicity. It allows us to focus on what’s important; it enables clarity and understanding; and it guides us in everyday decision-making.

Perhaps artist Hans Hoffman said it best:

“The ability to simplify means to eliminate the unnecessary so that the necessary may speak.”

In essence, we need to apply **more focus** on **valuable activities** toward **valuable outcomes**. We need to be relentless about value. With this in mind, let’s examine six “power tips” that can help us focus on valuable activities, simplify our processes, and enable the “necessary to speak.”

The Power of Checklists

We create forms, templates, and stage gates, in an attempt to gain control. But in doing so, we also create such barriers to implementation that it becomes like the Twelve Trials of Hercules just getting something implemented---or trying to satisfy a customer. Plus we lose flexibility, not to mention credibility with those whose support we need.

We often overlook the power of a simple checklist. For maximum flexibility in our processes, we should instead:

1. Secure agreement across all stakeholders on which process elements absolutely must be standardized (*important: get people's input on this*)
2. Determine which elements can benefit from having a checklist that would be available to all, and can be a working document, revised with each new learning. (*I used to maintain a simple “Have You Considered?” checklist*)

that all project managers would add to as they encountered new lessons.)

3. Express trust that those responsible for implementation will use the checklists wisely; watch out for where awareness must be increased (*key point: when checklist items are ignored, rather than overreacting by creating new bureaucracy, simply raise awareness or highlight certain items with an icon*)

If we look for where we can leverage checklists, we'd probably find that in many cases, checklists could negate the need for forms and approvals. After all, pilots on commercial airlines work together with their flight assistants on a pre-flight checklist; they don't have management come on board and approve them for takeoff. And there, people's lives are at stake.

Also consider that a single checklist implemented at Johns Hopkins Hospital had prevented forty-three infections and eight deaths, and saved two million dollars in costs. Moreover, as part of a study led by the Harvard School of Public Health (as reported in the New York Times), a year after surgical teams at eight hospitals adopted a 19-item checklist, the average patient death rate fell more than 40 percent and the rate of complications fell by about a third.

If checklists can improve healthcare and save lives, think of what it can do for your projects. Checklists are a powerful tool indeed.

The Power of Process Summits

People often talk about scope creep being a nemesis of projects. Perhaps an even larger nemesis is what I call "process creep." What happens is that each department that serves as a chain in the end-to-end cycle of a project creates their own processes in a vacuum, focused on satisfying the interests of their own area of expertise. In essence, they look at projects through their own, often limited, "lens."

Overall, this results in elongated processes; excess forms and templates; excess checkpoints; excess meetings; excess approvals; and general confusion for all parties as to what's actually needed to get the project past all of its "gates." Stage gate meetings seem like court hearings instead of streamlined decision points. Is this any way to work, or to add value to the customer?

Instead, we need to hold a *process summit*. The idea is to gather representatives from all areas involved in the end-to-end process (in an IT project, this may be representatives from IT security, quality, infrastructure, architecture, helpdesk, customer facing reps, and so on). The purpose is to lay out the end-to-end process via the COTW

(Cards on the Wall) approach. This way it's easy to question certain steps, to move things around, and to see where redundancies are.

It's also easy to spot the inefficiencies of the "whole system" as it relates to customer value. For instance, maybe certain processes are in place to ensure adequate quality or security. Perhaps they are overblown in proportion to the speed-to-market requirements of the project, or in proportion to other pressing urgencies. Perhaps they can be simplified, maybe with checklists. Or perhaps some of them are absolutely required---but at least everyone would have the opportunity to understand why.

It's also a good idea to include customers in this process. There is often a temptation to avoid this so as not to air "dirty laundry" or expose inefficiencies, but the benefits of an engaged customer far outweigh any risks. Plus, the customer will have a greater understanding of the considerations that go into a project.

A process summit not only can result in more streamlined and customer-oriented approach, it can also serve to create buy-in and understanding. It can make people feel included and listened to. And it can ensure greater participation and adoption without relying on compliance and policing. The key is to be open to all ideas and encourage dialogue. No topic should be sacred. Only then can real breakthroughs be made.

The Power of the Trash Can

By implementing checklists and holding process summits, we'll be well on our way toward simplifying our project management lives. In doing so, we also need to adhere to certain principles.

For instance, how many useless documents, standards, processes, and meetings do we have that depletes value instead of creates it? Wouldn't we be better off getting rid of these things and focusing our energy on the most value producing items? To this end, we must eliminate wasteful practices, processes, and projects---anything that does not create value, or that creates little value compared with other activities. I use "value" in a holistic sense, as opposed to strictly financial value. This reduction of waste is also a key principle of the famous Japanese swordsman, Miyamoto Musashi, as noted in *The Book of Five Rings*. The principle is this: **Do nothing useless.**

This "addition by subtraction" method can be another power tool in our quest for simplicity. Instead of a suggestion box, why not implement a GROI (Get Rid of It) box, where people can make suggestions for removing processes, forms or meetings that they feel are wasteful, along with their suggestions for alternate ideas?

The same principle can work for the presentations we make in meetings and at stage gates. We can help shorten these events and get our point across better if we're ruthless about cutting out the noise---any information that is not absolutely vital to

whatever decision must be made at the meeting. And if we're not making a decision at the meeting, or creating some kind of outcome that all are participating in, why meet? With few exceptions, one-way information is better presented via other forums, and even questions can be addressed via email, FAQs, discussion forums, or in a separate session.

The trash can is our friend. People talk about doing more with less. In reality, we need to do *less* with less, but achieve more value. *That's* powerful.

The Power of Brand Strategy

Most people don't equate marketing or brand strategy with project management. But when people ask me what kind of skills they should look for in a good project manager, I often suggest marketing. Marketing people understand how to focus on a niche, how to communicate, and how to simplify. They understand how to move *with* the grain instead of against it.

Specifically, there are two overarching rules of brand strategy that stand out above all.

- 1) **Get Typecast** – Unlike the film industry, in business we *do* want to be typecast. We want to be known for one thing, and one thing only. *We're the _xyz_ people. If you want _xyz_, come to us.* As brand strategists know, people create anchors in their mind linking a single idea or concept to a person or business. The idea is to pick one central theme and beat it to death. Dissect it. Analyze it. Talk about it. Write about it.

What does this mean to the project management field? Everything. From an organizational or PMO level, a single overarching theme will rally people easier than a convoluted message, a complicated methodology, or a list of fluffy feel-good words. Maybe the current goal is to do better estimating, to plan better, or to be more customer-attentive. Whatever it is, focus on one thing at a time, and then move to the next most important thing. It's much better than saying ten things and having people remember nothing.

From a project level, by stating the one single most important thing that the project *must* deliver, it will help remove barriers and speed up decisions. It can also help in customer relations as well---a single concept that will bring everyone together. In this way, everyone is working toward a common goal, and decisions will revolve around that goal.

- 2) **Focus on Value and Benefits** – A key tenet of brand strategy is to sell what *they* think they need ("they" being the customers), not what *you* think they need. In other words, don't sell solutions; sell *benefits*. You're not selling a car, you're selling transportation, or a lifestyle, or whatever it is that's meaningful to your

customer. The key is to know who the customer is and what it is they need---what they're starving for.

Again, this principle holds true on both a macro level (e.g. implementing a project management framework) or on a micro level (e.g. on a specific project). We need to focus on what the customer needs, and communicate in those terms. Instead, most PMOs and project managers focus on their internal processes, or on the tools they're using. They talk to customers and stakeholders in terms of solutions, tasks, and processes---not the benefits the customer will achieve.

By focusing on one thing at a time, and by always keeping customer benefits in mind when creating and communicating processes, we can smooth the way for less resistance---by team members, customers, and stakeholders. And doesn't this make our lives simpler?

The Power of Service Standards

When project teams are in the heat of action, they are often too busy to remember complicated rules or mission statements. Successful organizations realize this and instead create prioritized service standards. Ideally this should be no more than three or four items, in priority sequence. This gives people real guidance when making independent decisions. And let's face it; we don't want people to be dependent on management for every project decision. We can greatly simplify the decision-making process and our team cohesiveness by having such standards.

The Walt Disney Company has prioritized service standards. They are, in order:

1. Safety
2. Courtesy
3. Show
4. Efficiency

Safety trumps everything. Courtesy trumps Show. Show (i.e. the perception that everything is real) trumps efficiency. But all are important. If a child were about to fall from a platform, a Disney cast member (as all Disney employees are called) would run to help, regardless if he or she was helping a guest, or had to go "out of character" to address the safety issue. If a ride could be made more efficient but it would make the riders feel rushed, or would detract from the experience, the modification would be nixed by Disney.

Let's apply the same thinking to a software project for instance. Let's say we had a software development team and we had set three prioritized service standards:

1. Ease of use

2. Ease of maintenance
3. Performance

Software developers would know instinctively what their priorities should be. The product must perform well, but not at the expense of being maintainable, and certainly not at the expense of being easy to use (which was always my barometer for well-developed software). This is just one example of the many ways prioritized service standards can be more powerful than any mission statement. Service standards are simple, easy to remember, and above all, *actionable*.

The Power of Inclusion

The last power tool we'll discuss is perhaps the most important---the power of inclusion. By including others in creating forms, processes and templates (especially the people that have to *use* them), we can increase the likelihood of greater buy-in---and a leaner template. This doesn't mean including the whole world, or design by committee. There is a difference between inclusion and consensus. But it *does* mean probing the thoughts of the people who will use or benefit from the document. Small teams of 3-7 people tend to work best.

For example, many organizations have a problem getting agreement or buy-in on the format of a business case template for justifying and approving projects. Some people think it's way too long. Others think more information is needed. What we need to do is hold a session with representatives who will use the form (either to populate the data or to use the data to make some decision). We need to ensure that questions are encouraged, that the need for each piece of data is challenged, and that every bit of information agreed upon will be used by someone to make a decision. This may take some savvy facilitation, as some people have a tendency not to speak up, and then complain later.

We also need to encourage simplicity, erring toward the "less is more" approach. Some people may feel compelled to include everything "just in case." It's better to start lean, and add things later if needed.

Summary

We've discussed six power tools for simplifying project management:

1. **Checklists** – which reduce errors without adding red tape and extensive approvals or oversight
2. **Process Summits** – which allow everyone to clearly see redundancies and inefficiencies when looking at the "whole system"
3. **The Trash Can** – which encourages lean thinking and eliminates waste
4. **Brand Strategy** – which fosters a focused and customer-oriented mindset

5. **Service Standards** – which give people simple priorities by which to operate and make decisions
6. **Inclusion** – which increases the likelihood of purposeful documents, greater buy-in, and active engagement

None of these tools are complex. As researchers in quantum physics have discovered, complex systems have simple roots. Such roots gently inspire a direction without trying to predict every possibility. They increase the likelihood of success without trying to dictate or control every move. They allow an organization to operate on the edge of chaos, yet remain true to a common purpose. *This* is the power of simplicity.

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