

**Project Management Memory Jogger™ (Regular and Advanced)**  
 By authors Paula Martin, Karen Tate and Cynthia Stackpole  
 (Book review by R. Max Wideman)  
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## Introduction

Strictly speaking, this is a review of *two* books, namely *Project Management Memory Jogger* (A Pocket Guide for Project Teams) and *Advanced Project Management Memory Jogger* (A Pocket Guide for Experienced Project Professionals). Note that the former is for "Project Teams" and the latter for "Experienced Project Professionals", so for clarity we will refer to the former as "PGPT" and to the latter as "PGEPP".

And also, strictly speaking, these are not "books" in the traditional sense but rather, as stated on their respective covers, "Pocket Guides". Indeed, the emphasis here should be on the word "Pocket" because these books are truly pocket sized measuring only 4" x 5½". They are also ring-wire bound so that the pages open comfortably and *stay* open!

Paula Martin and Karen Tate produced the pocket guide for project teams in 1997. It now claims to have sold over one million copies to happy customers. Undoubtedly, I am one of them as it has been my constant companion and is now somewhat dog-eared. This booklet came about because the sponsoring training company, GOAL/QPC, was asked by their clients to develop a simple project management reference tool. The objective was to help their project sponsors, team leaders and team members to work more effectively together to complete projects on-time and within budget. Oh, yes, and throw in "with exceptional results" for good measure.

As the author's promotional material states:

"This handy pocket guide provides a project road map to enable teams to prepare for, charter, execute, and close out successful projects. Key concepts in each step of the project management process are illustrated in a case study that parallels the process. Each step also includes a discussion of why and how to complete each portion of the process. A valuable asset that can be customized to incorporate your organization's unique culture and business goals, the *Project Management Memory Jogger* explains the skills and knowledge [that] team members need to apply to each project."<sup>1</sup>

This little book proved to be so popular that, as might be expected, it has now been joined by a whole series of booklets addressing various other aspects of project management. At present count, there are some thirty in all. However, of these, the most relevant to the first publication is the second book: *Advanced Project Management Memory Jogger*, by Karen Tate and Cynthia Stackpole, published in 2006. The keen observer will note that the second book effectively captures the advances in project management thinking and practice over the intervening nine years.

An important aspect of these booklets is that they are not slavish descriptions of accepted project management theory. Rather, they are basic descriptions of *how to do* a project and/or how to deal with various challenges and problem solving that inevitably arise in the course of a project. The material is also largely generic, so that it is not encumbered with any particular technology methodology. However, the Project Teams guide does differentiate between three types of project essentially by drawing a distinction based on size and degree of complexity.

## Book Structure

The *Pocket Guide for Project Teams* (PGPT) contains the following chapters:

1. Creating Successful Projects
  - Know the Geography
  - Plan the Journey
2. How to Create a Project Charter
3. How to Work Together as a Team
4. How to Create a Project Plan
5. Doing the Project
6. How to Close Out the Project

As the "How to Use this Book" introduction explains:

"This pocket guide provides a variety of examples, visual cues, design features, and clear, friendly language that we hope will encourage project teams everywhere to use this book, and use it often! Everyone on a project team can use this book as a daily reference on the job and/or as a supplement to training. **Have fun!**"<sup>2</sup>

The *Pocket Guide for Experienced Project Professionals* (PGEPP) contains the following chapters:

1. Building a Project Management Infrastructure
2. Managing Your Project and Program Portfolio
3. Tailoring Project Management to Your Project
4. Refining Your Project's Scope
5. Scheduling
6. Managing Project Risk
7. Controlling Project Progress
8. Improving Team Communications
9. Conducting Negotiations and Resolving Conflict
10. Applying Effective Leadership to Projects

As the "How to Use this Book" explains:

"This book uses visual cues, examples, design features, and clear, friendly language to help align all of the project professionals in your organization to support organizational project performance. Whether you use this book as a reference or as a supplement to training, we trust that you will see an improvement in your organization's effectiveness in managing and controlling projects."<sup>3</sup>

And to that we might have added: "And an improvement in the quality of the project deliverables and outcomes."

But note the absence this time of any reference to "fun"! Does that imply that once you get to an "Experienced" level, project management is no longer fun? Sure, it is stressful being under pressure of time and cost constraints, but the results should be very rewarding and satisfying to all concerned – and hence a lot of "fun".

## What we liked

We have always been great fans of bullets, tables, charts and graphics as a way to capture a lot of information in minimal time and space. These booklets use all of these devices as well as distinctive

icons to flag directions to the reader to different types of important points in the content. They also use page layout graphics to introduce further differentiation. It is clear that the original authors exercised a great deal of careful attention to the design of these booklets to make them as useful and user friendly to the reader as possible.

We liked the key features of the book designs. For example, in both books each minor topic is set apart and dealt with under just two headings:

- Why do it? And
- How do I do it?

We also liked the usefulness of the content in particular such as:

- The Project Management at a Glance chart<sup>4</sup> or the topics of primary and secondary interest to the key players<sup>5</sup>
- The easy-to-follow case study (in PGPT) and the frequent examples (in both books)
- Clear and concise bulleted instructions
- The definition of key terms
- The examples of charts and documents that are involved
- The frequent "Tips and Pitfalls" hints signified by the cautionary Stop Hand icon

Why organizations need project management is explained in the PGPT in this way. Project management:<sup>6</sup>

- Ensures that customer requirements are met
- Eliminates "reinventing the wheel" by standardizing routine project work
- Reduces the number of tasks that could be overlooked during the project
- Eliminates duplication of effort
- Ensures that projects are in control
- Maximizes the use of resources

Well, at least, hopefully!

The PGPT also describes the project life span content in the simplest of terms as follows:<sup>7</sup>

- A decision is made to launch a project.
- A charter is prepared, which outlines the requirements and limitations of the project. The sponsor usually writes the charter in collaboration with either the project leader or the management steering group.
- The charter is discussed with the project team and distributed to management and key stakeholders
- The project plan is drafted by the project team, approved by the sponsor, and distributed to management and key stakeholders.
- The plan is executed and monitored, and the final deliverables, i.e., a product, service, process, or plan, are delivered to the project customers.
- The project is evaluated and a closeout report is written and distributed to management and key stakeholders.

The PGEPP, on the other hand, focuses on three key areas:<sup>8</sup>

- Building and Managing a Project Management Infrastructure (in Chapters 1 and 2)
- Advanced Skills in Project Management (in Chapters 3 through 7), and
- Leadership Skills for Project Managers and Team Members (in Chapters 8 through 10)

## Downside

As we have observed before, producing a book requires a lot of dedicated time and effort on the part of the author or authors.<sup>9</sup> Composing and writing a book is not a trivial project, whereas it is easy to be critical of the result. Moreover, critics often see the opportunity to criticize as an opportunity to brandish their own opinions – and we are no exception.

Up to the 1990s, many practitioners and academics took the view that project management only started when the production work started, that is, in the execution phase. And maybe for most people that was true. However, even in the 1980s we knew that the origin of a project is typically a "need"<sup>10</sup> and that this need might be translated into a project. However, by the time the first decade of the new century rolled around, the large number of "failed" projects, at least those that failed in terms of time and cost, became a serious concern. This was, and apparently still is, especially true in the emerging information technology domain.

Consequently, a better "front-end filter" became imperative. That is to say, there needs to be a way of differentiating and prioritizing those projects that are potentially economically viable and consistent with the corporate goals and objectives. Hence the arrival of the project Business Case – a document to justify funding at a minimum for further investigation as to what should be done, the best way of doing it and the resulting pay back. This has given rise to a new field of study: "Business analysis", and clearly this is an important prelude to any project execution. It helps to know why you are doing the project in the first place!

We think this should be a key element of the Pocket Guide for Experienced Project Professionals.

Chapter 2 of the PGEPP introduces "Managing Your Project and Program Portfolio".<sup>11</sup> To us, this muddies the waters between project management, program management and project portfolio management. In our view, project portfolio management in particular is a different discipline with different objectives and different tools and techniques. This subject should have its own dedicated Memory Jogger – there would be plenty of content to fill it!<sup>12</sup>

Nevertheless, Chapter 2 goes on to describe some aspects of project portfolio management but finishes a little lamely without discussing the whole purpose of project portfolio management, namely, the harvesting of the benefits of the products that the projects produce. Interestingly, "Project Benefits Management", like the Business Analysis mentioned earlier, is also emerging as a new area of study.

PGEPP Chapter 3, Tailoring Project Management to Your Project, talks about Customer Needs, Project Success and Adapting Project Management accordingly. These are all difficult areas and, in our view, poorly articulated in much of the current literature. For example, the success of the *project* may be measured by the extent to which it is completed "on time and within budget". But what of the success of the *product*, is it producing the expected benefit? On these terms the project could be a great success and the product a disaster. Or, for that matter, vice versa, but which result best fits the "Customer Needs"?

The "Experienced Project Professional" (EPP) should understand that project management cannot exist in isolation. It always exists in conjunction with a particular type of product and the necessary technology involved in creating that product. Moreover, the EPP should also understand that the methodology for managing the project, i.e. the project life span sequence, can and should be consistent across all projects with only the degree of "ceremony" tailored to suit the size and complexity of the

project in question. However, the methodology suited to the type of technology involved is quite another matter. That will vary considerably according to the area of project management application. An obvious example is the difference between a project in information technology and a project in engineering and construction.

We have a few other suggestions for this Chapter 3. There should be more focus on the project manager's real task of planning and scheduling future activities and estimating their cost to completion rather than on just status reporting. Instead, this topic (Developing a Forecast<sup>13</sup>) is buried in the section on Planned Value and Earned Value, where the suggested approach is highly unreliable in practice due to the "S" curve effect. We also feel that it would also be worthwhile emphasizing the need for establishing the customer's expectation in terms of quality grade of the product. This is necessary to form the basis for Quality Management.

The remaining chapters of PGEPP deal with specific project management techniques. Here we would like to have seen a section on the issues of setting Contingencies and Management Reserves. These provide the project manager and his or her sponsor respectively with "elbow room". Contingencies and Management Reserves are not the same thing!<sup>14</sup>

## Summary

These two booklets, *Project Management Memory Jogger: A Pocket Guide for Project Teams* and *Advanced Project Management Memory Jogger: A Pocket Guide for Experienced Project Professionals*, provide an incredible amount of project management information. This information is provided in a very compact space and at a very modest cost. The two books represent an invaluable reference source of immediate **How-To** instruction for both neophytes as well as seasoned professionals.

They are truly pocket-sized at only 4" x 5½" and can therefore become a constant companion. Just the sort of think you need for looking up in a hurry, or for passing a few moments while waiting for something else to happen like boarding an aircraft, or attending that doctor's appointment. That's assuming, of course, that you have already answered all your Email on your hand-held device!

In fact the *Project Management Memory Jogger* guide is considered so valuable that the Wideman Education Foundation (WEF) has adopted it as one of its gifts. The WEF makes a point of giving a copy to every high school student in grades 10 to 12 that completes the program and presents their project results in the annual WEF competition. This competition is designed to introduce these enthusiastic youngsters to up to a score of sound project management practices that also represent valuable life skills.

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<sup>1</sup> [http://www.goalqpc.com/shop\\_products\\_detail.cfm?PID=33](http://www.goalqpc.com/shop_products_detail.cfm?PID=33) accessed 12/29/09

<sup>2</sup> *Project Management Memory Jogger: A Pocket Guide for Project Teams* (PGPT), GOAL/QPC, 1997, p iv

<sup>3</sup> *Advanced Project Management Memory Jogger: A Pocket Guide for Experienced Project Professionals* (PGEPP), GOAL/QPC, 2006, p iv

<sup>4</sup> In the PGPT, p10

<sup>5</sup> In the PGEPP, p xii

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<sup>6</sup> PGPT, p vii

<sup>7</sup> Ibid

<sup>8</sup> PGEPP, pp x-xi

<sup>9</sup> See a previous summary at [http://www.maxwideman.com/papers/two\\_books/summary.htm](http://www.maxwideman.com/papers/two_books/summary.htm)

<sup>10</sup> Project Management Body of Knowledge, Standards Committee, Project Management Institute, 1987, Figure 1: Typical Project Life Cycle, page 1-3

<sup>11</sup> PGEPP, p15

<sup>12</sup> See Issacons 1004c1 through 1004c12 on Index page: <http://www.maxwideman.com/issacons/index.htm> and starting at <http://www.maxwideman.com/issacons/iac1004c1/index.htm>

<sup>13</sup> PGEPP, Chapter 7: Controlling Project Progress, p 104

<sup>14</sup> PGEPP, see definition of *Reserve* on p58