

Lessons in Project Management
By Tom and Jeff Mochal, published by Apress, CA, 2003
(A book review by R. Max Wideman)

Introduction

We might have titled this piece "Painless Project Management Learning" but we need to stick to the title of the book. In it, authors Tom and Jeff Mochal have created a fictional world of a large corporate company called "Mega Manufacturing". We are told that Mega Manufacturing is the fifth largest manufacturer in the nation.¹ Presumably, the nation is the USA but what the company manufactures is not clear. What is clear is that they have a large Information Technology (IT) department where projects abound, project managers abound and, of course, problems abound.

It seems that the organization has just discovered the need to improve the efficiency and success rate of their projects to which end they have created the position of "project management advisor". "Tom" is that advisor and the book is written like a diary of events spanning a whole year, from the snow falling in January, to the final annual Christmas lunch.

Through the course of the year, you get to meet the members of Tom's family, and many of Tom's coworkers and brief snippets of their individual backgrounds and family life. Into this, is woven the project management activities and problems of the company's project managers that Tom meets and, of course, to whom he dispenses his unfailing wisdom.

By the end of the book, you feel that not only do you know Tom and his family but also the company and his coworkers. Along the way, hopefully, you have digested fifty valuable lessons in project management. Each lesson learned illustrates a key issue associated with one of the ten steps in Tom Mochal's TenStep^{®2} project management methodology. As Tom says:

This book represents my 24 years of experience working on projects, managing projects, and managing people who manage projects. Like most project managers when they start out, I did not sit down and learn project management before I started managing projects. Initially, managing projects just meant determining what needed to be done and then working with one or more people to get it done. After managing projects a few times, I became more comfortable planning out work and managing it to completion. These projects ranged from small and large enhancements projects to multi-million dollar initiatives.³

Tom Mochal's experience includes building a Project Management Office and deploying formal project management processes through a worldwide IT organization.⁴ But as Tom says of his book "The marketplace is full of project management books, columns, best practices, tips and traps. The question is not, 'Can you find project management content?'. The question is 'Will you remember it at the appropriate time to apply it on your project?' "

Book Structure

The book starts out with a brief description of each of the ten steps in the TenStep Project Management Process. In Tom's view, these steps represent a logical sequence of the primary or key activities in managing an IT project.

With this as background, the reader is then treated to fifty vignettes that take place throughout the year of Tom's (the book character) tenure as project management advisor. Each vignette provides a short description of the project manager with the problem so that you feel you get to know the person, followed by a description of what they are doing and the difficulties that they are facing.

These vignettes are very succinct and generally cover two pages at the most. These pieces are printed in italics to distinguish them from the lessons that follow. The lessons that follow, printed in regular font, present a specific lesson based on the vignette and have an explicit lesson title such as "Lesson 2: Make sure you always have an identified and committed sponsor and client organization".⁵

The fifty "problems" or stories and their corresponding lessons tend to be in somewhat random order, so that four tables of contents are provided. The first table of contents lists the "Contents by Story", and the second lists the "Contents by Lesson". The third lists the "Story and Lesson Chronology", i.e. a chronological listing including the time of year and the character involved, while the fourth table of contents provides a "Cross Reference of Project Management Processes and Lessons".

The book includes a CD on which you can find 25 templates for key project management deliverables such as a Project Definition Document (eight pages), a "Scope Change Log" (two pages), a "Communications Plan" (four pages), or a "Customer Satisfaction Survey" (three pages). These templates are provided in both Microsoft Word and PDF formats.

In support of these, an appendix at the end of the book provides a summary and description of the templates listed according to the steps in the TenStep process. Finally, a short Glossary provides narrative descriptions of key terms used in the text.

What we liked

Under *Book Structure*, we noted that the fourth table of contents provides a "Cross Reference of Project Management Processes and Lessons". This is possibly the most useful for anyone who has read the book through as a comfortable and engaging read and then wishes to use it as a learning reference for the TenStep project management process sequence itself.

For a neophyte project manager, like many of those in the stories, or even for a newly-organized project management group, the templates provided on the CD should be a valuable starting point for standardizing key project management documentation.

Some quotations worthy of note

On leveraging knowledge from prior projects and saving knowledge for future projects:

"So much organizational knowledge gets lost over time if no processes are designed to capture and exploit information. This is the essence of knowledge management, which consists of the processes required to collect, organize, retrieve, share, and leverage the knowledge that exists throughout the company. Sometimes this knowledge is organizational in nature, but many times the knowledge is project based, and can be leveraged on subsequent projects."⁶

On work plans:

"Don't 'micro-build' or micromanage the workplan . . . Generally, there are two rules of thumb when it comes to defining the level of detail in the workplan. First, [it] must be at a level where both the project manager and the project team can understand the work . . . If a piece of work is well understood, it can be placed on the workplan at a higher level. However, if it is not clear what the nature of the assignment is, then the activity should be broken down into its more basic components (in some companies, these lowest level statements are called *tasks*.) . . . The second rule of thumb is that the workplan must include time to react if an activity is in trouble. In general, an activity should never be longer than 80 hours (two weeks) [assuming] a typical six-month project."⁷

On the subject of estimating:

"By its very nature, estimating is a guess. Of course, by using proper estimating techniques, you can make it a very close guess. However, there is always some degree of uncertainty in an estimate [so] Don't use your estimating contingency for scope changes . . . When you place a contingency in the project, everyone should understand that it is there to recognize the estimating uncertainty."⁸

"In general, you can estimate work based on one of three scenarios – worst case, most likely case, and best case. If you give your client an estimate based on the worst-case scenario, you are not under-promising. You are sandbagging, which means you are purposely setting very low expectations you know can be exceeded."⁹

"The best-case scenario is just the opposite. If you present the best case you are assuming everything will go according to plan and everything will work great the first time. This is also not a good estimate to present to the client, for the same reason that worst-case numbers are not good. The client cannot make the best business decisions if the project estimates are skewed one way or another."¹⁰

On the subject of risks, problems and issues:

"An 'issue' arises when a problem will impeded the progress of the project and cannot be resolved by the project manager and project team without outside help¹¹ . . . In other words, an issue is a current problem that must be dealt with, whereas a risk is a potential problem that has not yet occurred¹² . . . One of [the team's] primary responsibilities is to raise issues when they see them."¹³

"Issues and risks are related but not the same . . . By its nature issues management is a reactive project management process [whereas] risk management is a proactive project management process, since you are trying to deal with potential future events."¹⁴

On managing documents:

"Manage documents properly to avoid confusion and mix-ups. One of the more sophisticated aspects of managing a project is to manage the flow of documentation. Small project teams normally do not need to put a lot of effort into document management. However, sharing of information becomes increasingly complicated, as a project gets larger. Document management tools can help to enforce many of the rules for sharing documents, but most companies still rely on manual processes . . . The best practice is for project managers to consider the amount of documentation their project

will generate before the project starts . . . [And] for your company to establish some guidelines and templates that can be easily and consistently used by default by all project managers in the organization."¹⁵

To which we might have added, "And before the whole thing gets out of control and lands in a real mess."

Downside

Surprisingly, given our previous book reviews, we found very little that we could criticize. If anything, criticism would have to do with the book's audience. The book is titled "Lessons in Project Management" and adds on the cover: "Teaches important project management lessons to help resolve real-world project situations you may come across." To be fair, however, the lessons described are those that would be encountered in a large, or perhaps even a not-so-large, information-systems/information-technology corporate environment. The authors are, after all, both from this project management domain.

Consequently, it is unlikely that those from other domains, such as engineering and construction, will be likely to empathize with the stories, even though in principle the lessons are just as relevant.

Summary

For those working in the IS/IT project management environment, and in need of a solid project management methodology unfettered by unnecessary, obtuse and bureaucratic project management system "input-output processes", Tom Mochal's TenStep methodology is highly recommended. And for those wishing to gain an insight into real-world project problems that the TenStep methodology is designed to solve, this book provides valuable supporting material.

It is also a charming and easy read. As we quoted Tom Mochal earlier, the question is: "Will you remember [the project management content] at the appropriate time to apply it on your project?" If, after reading it, you can answer "Yes", then it will have served the most valuable purpose of all.

R. Max Wideman
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¹ Mochal, T., and J. Mochal, *Lessons in Project Management*, Apress, CA, 2003, p8

² You can find details of the TenStep project management methodology at <http://www.tenstep.com>

³ Mochal, T., and J. Mochal, *Lessons in Project Management*, Apress, CA, 2003, pXXV

⁴ Ibid.

⁵ Ibid, p14

⁶ Ibid, p52

⁷ Ibid, pp32-33

⁸ Ibid, pp81-82

⁹ Ibid, pp171-172

¹⁰ Ibid, p172

¹¹ Ibid, p3

¹² Ibid, p5

¹³ Ibid, p57

¹⁴ Ibid, p75

¹⁵ Ibid, pp36-37