

The Project Management Tool Kit
(100 tips and techniques for getting the job done right)
By Tom Kendrick
(A book review by R. Max Wideman)

Introduction

We've often wondered just how many "processes" there are that are specific, or at least relevant, to project management. Now author Tom Kendrick provides at least a large part of the answer. Tom has identified and provided how-to instructions on one hundred of them in his book: *The Project Management Tool Kit*.¹ True that thirty-nine of them are lifted out of the Project Management Institute's Guide to the Project Management Body of Knowledge, 2000, and that some of these have been changed in the 2004 version of the Guide. Still, the differences are not necessarily material from a practical standpoint.

As Tom says on the back cover of his book:

"The Project Management Tool Kit collects the best known project management techniques in an easy-to-apply, accessible format. The book presents easy-to-understand summaries of every indispensable practice, showing you step-by-step how to handle important considerations like:

- Cost estimating and budgeting
- Communications and technology
- Goals for individuals and project teams
- Negotiation and decision-making
- Establishing and retaining management support
- Implementing change and process improvement
- Quality assurance and control
- Risk assessment and management
- Scheduling and time management
- And more – 100 subjects in all"

Tom adds:

"You'll also find helpful checklists and other tools for quick implementation. If you're a novice, the book will lead you calmly and effectively through unknown territory. And if you're an experienced project manager, this complete guide will serve as a repository of process checklists to ensure that you never forget a step, even when handling the most unusual or complicated projects."

Well, that might be a bit optimistic, but in general we would agree and it certainly is useful to have a reference to this kind of guidance all in one place – a sort of handy generic pocket-sized procedures manual.

Book Structure

This book has one hundred sections, each of two to three pages, and each section is dedicated to a discrete process, procedure or technique (all of which in our opinion amount to much the same thing², so we'll simply refer to them all as processes.) All the processes are identified by brief labels and are presented in alphabetical order and similarly listed under "Contents" at the front of the book.

However, the Content list is followed by a brief instruction on "How to Use This Book (Read This First!)" that includes a listing of the processes under the following headings:³

1. General Processes (14)
2. Leadership Processes (8)
3. Teamwork Processes (11)
4. Control Processes (11)
5. Scope Processes (8)
6. Time Processes (9)
7. Cost Processes (6)
8. Quality Processes (4)
9. Human Resources Processes (7)
10. Communication Processes (9)
11. Risk Processes (6)
12. Procurement Processes (7)

The numbers in brackets indicate the number of processes listed under each heading, and each of which carries the process number used in the book. As the author observes:

"The Project Management Tool Kit is based on established, practical ideas used by successful project managers in many fields, and includes processes from all of the areas outlined in the Project Management Institute's PMBOK® Guide, 2000 Edition."

The book is obviously a reference book, but it is also useful for skimming the contents. To facilitate this, within each process, key words are in *italics*, and cross-references in **boldface** relate to processes elsewhere in the book.

What we liked

As we mentioned earlier, just the listing of a large number of processes specific to project management is a useful exercise. Thirty-nine of them have been extracted from the 2000 version of the PMBOK Guide, but that means that Tom has found another sixty-one to make up the total of one hundred. Of course, some will say that not all those included are necessarily special to project management and not every one will agree on whether they are correctly allocated to the headings listed earlier.

Still, even the number of processes listed under each heading is instructive. Aside from General Processes which is the largest as might be expected, the two next largest with specific orientation are Teamwork Processes and Control Processes, each with eleven. Either this represents the author's bias or, as we suspect, is reflective of the primary thrust of the project management discipline. Next in line are the Time Processes and Communication Processes, each with nine. At the bottom of the list is Quality with only four processes. Given the importance of quality to the acceptability of the final product, it would seem that quality is short changed.

The description of each process follows a standard format. By way of introduction, each process is introduced with "What", "When" and "Results". "What" describes what the process is about, "When" describes when the process is most likely to be needed and used, and "Results" describes the expected outcome of the process. This introduction is then followed with the prescriptive steps required to achieve the outcome. What could be simpler!

Here and there, there are some unexpected processes that perhaps are only just beginning to appear on the radar screen of mainstream project management. Examples include:

- **Global Teams – Cross-cultural Communication** described as communicating effectively with distant team members, particularly international teams. Under *Communication Styles*, one recommendation is "avoid 'yes/no' questions with team members who might respond 'yes' to be polite".⁴
- **Global Teams – Cross-cultural Work Styles** provides a list of reasons, benefits and challenges relating to global projects.⁵
- **Influence Without Authority** describes how to gain commitments from project contributors from other organizations. One suggestion is to use the *principle of reciprocity*: i.e. in return for the project commitment offer something meaningful in exchange. The text offers five suggestions that do not involve money.⁶
- **Market Research** describes how to use the technique to obtain reliable information for a *user needs assessment* to establish project scope.⁷

Where necessary, the concept of a process step is illustrated by a simple diagram. Two that took our fancy and appearing under *Risk Response Planning* are shown below.

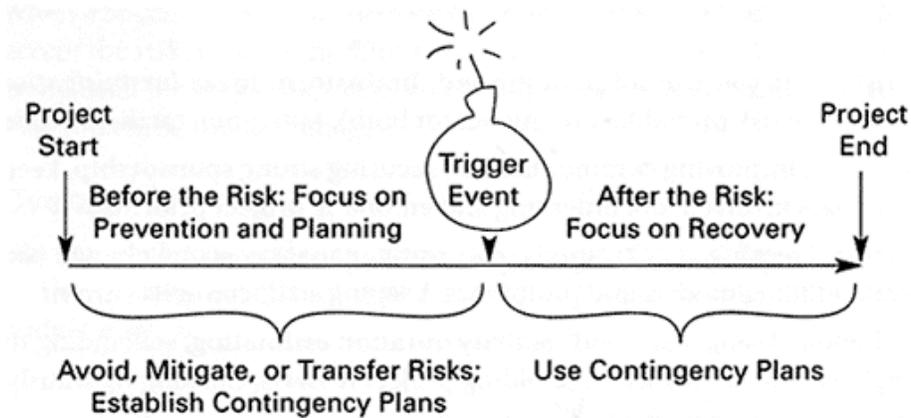


Figure 1: Risk Response Timeline⁸

Figure 1 clearly shows project management's switch in focus upon the occurrence of a risk event.

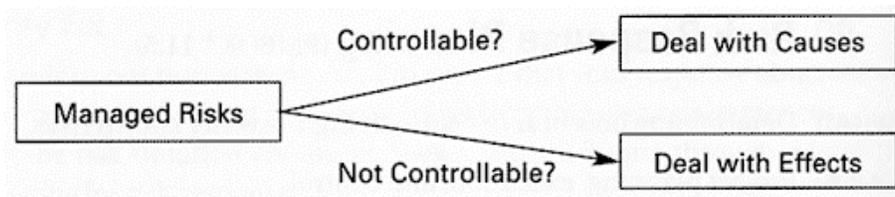


Figure 2: Risk Management Strategies

Figure 2 shows that after identifying the risks of concern, the next step is to segregate them into controllable and uncontrollable so that two different types of response can be implemented.

Downside

Amongst the "unexpected" processes, mentioned earlier, is *Project Infrastructure*⁹. Project Infrastructure discusses a framework for project planning and control throughout a project. This example provides

three pages of questions to be resolved and documented for purposes of ensuring comprehensive planning and efficient project execution.¹⁰ Actually, this process is intended to establish the project life span or methodology to be followed by the project. Therefore, it appears to be more a matter of corporate policy and the responsibility of executive management or at least the project management office.

However, we felt that a generic version of the project life span would have been better stated up front in the book. Of course we advocate for a generic life span such as *The PLS phase deliverables and executive control points or gates* as shown in Figure 1 displayed here:

<http://www.maxwideman.com/musings/aka.htm>. And if that is too rich, then at least a project life span that consists of a first period that contemplates making sure of selecting the *Right Project*, followed by the second period in which we see that right project *Done Right*.

This would give the reader the framework for understanding the "When" descriptions provided in the introduction to each process and it would also have clarified some of the process steps described. Even the *Organizing for Project Management*¹¹ process misses an opportunity to advocate for a clear project life span methodology with an adequate number of executive control points or "gates".

Another unexpected process is *Communicating Informally*.¹² The "What" describes this process as "Periodic person-to-person communication without a specific purpose", and the steps may be "Unstructured" or "Structured". Well, maybe the purpose is simply to open up lines of communication to be ready in a listening mode. Actually, that is one important process that is not listed – the process of ***Listening***, one that we think is particularly important in a project management environment.

Speaking of processes not listed, some significant processes that we think should have been included are:

- ***Estimating Time at Completion***. Rigorous estimating of time required for the remaining work to arrive at the latest projected end date is, in our view, sufficiently different to warrant a separate process description. This is not mentioned as a step under *Schedule Control*.
- ***Estimating Cost at Completion***. Similarly, rigorous estimating of the cost of the remaining work to arrive at the latest projected final cost is also sufficiently different from "earned value" calculations that it warrants a separate process description. This is not mentioned as a step under either Cost Control or Cost Estimating.
- ***Maintaining a Risk Log*** for tracking identified Risk Events seems to us to be an important project management process worth including.
- ***Maintaining an Issue Log*** also seems to be a valuable process similarly worth considering for inclusion.
- ***Transfer of Care Custody and Control*** of the product to the users. This process is a vital link in the chain of achieving project and product satisfaction. Failure here can mean that a good product may never become accepted and realize its benefits. The act of product transfer is not even mentioned in *Administrative Closure*.

Summary

In this book, the author has assembled one-hundred "processes" based on established, practical ideas used by successful project managers in many fields, including those identified in the Project Management Institute's PMBOK® Guide.¹³ The book is organized for quick, random access to the processes and provides a consistent and easy-to-use compact format for each.

Examples of processes include such useful general items as: Brainstorming; Decision Making; Negotiating Project Changes; Project Objective (Mission); Rewards and Recognition; and User Needs Assessment.

Notwithstanding the "Downside" items we've listed, this is a valuable and handy little reference book of project management processes. It has a few executive management processes like Project [Portfolio] Office thrown in for good measure, or perhaps to make the number up to one hundred! Tom Kendrick has done a good job of identifying and describing most of the main project management processes used by today's project managers in the majority of today's projects.

R. Max Wideman
Fellow, PMI

Postscript

Editor's Note:

As a matter of editorial policy, upon completing a book review we always try to reach the author to give him or her the opportunity to review our observations on their work. We are not always successful in making contact, but the purpose is to make sure we have not made any errors of fact in our quotations or observations such that might compromise our opinions. While not all of our observations are complimentary, most authors appreciate this opportunity.

In this case, author Tom Kendrick has written an interesting response in which he explains how his book came about, and why it is the way it is. We thought that readers would like to hear what he has to say. We also wish him well in his new-found retirement and expect that he will be busier than ever and, like us, wonder how he ever had time to go to work.

Date: Wed, 03 May 2006
From: Tom Kendrick
Subject: Re: The Project Management Toolkit
To: R. Max Wideman

Hi Max:

First, let me thank you for the review and for your taking the time to read through and consider the book in such detail. I am flattered by the kind words and there are not really any "errors" to comment on; your comments reflect either a consequence of the constraints I accepted when I took on the book or a difference in perspective, which is inevitable.

One of the AMACOM editors approached me in 2003 looking for a "200-page, 100 Chapter" PM book. He sent me the AMACOM "Manager's Tool Kit" as a sample of what they had in mind. I thought it would be an interesting challenge, so I agreed to write it. Unlike anything else I had written, The "Tool Kit" had to be written in its entirety, all at once not one chapter after the next.

For the proposal, I listed 100 topics that seemed logical, including the (then) 39 PMBOK® sub-knowledge areas. For topics in the 39 that seemed too big for a 2-page summary, I created new ones to break out some content. I added a few more topics that are not really explicit in PMBOK, particularly

those relating to interpersonal PM aspects (where PMBOK is rather weak). As I got started, I wrote all 100 topic sentences (these turned into the header blocks). This uncovered some redundancy as well as missing topics, so the 100 morphed somewhat into a new list. The next step was to write a detailed outline for each short chapter, including all the cross-references. This revealed even more redundancy and missing stuff. Through further modifications I created a stable, final list of 100. This process did make some PM ideas less obvious because they ended up embedded inside one (or several) of the resulting chapters.

On things you noted as missing: Maintaining a "risk list" is included (as in PMBOK) in the risk identification and risk control chapters. Managing project issues is central to about a half dozen chapters (including those on meetings, performance management, conflict management, problem solving, decision making, and problem escalation). I decided to cover issue management in the context of issue sources, but that was a personal choice. User acceptance and transfer could also have been more obvious, but I decided to include it in "Scope Verification" since I had committed to including a chapter on all 39 PMBOK topics and it did seem to fit there.

Quality is unquestionably a key PM topic, but in most of the project contexts where I have worked in, it substantially overlaps with scope management, and I covered a lot of traditionally quality-related topics in those chapters. Estimating remaining work and cost (and when necessary, shifting the project baseline) are addressed to some extent in the project review chapter, as it is not typically something done for most projects in every single status cycle. I do take your point that re-estimating cost and timing could have been addressed more explicitly.

Two other areas worth a brief comment are infrastructure and "MBWA".¹⁴ I have typically worked, as many do, in a project environment that is not very rigidly structured. There are usually few enforced methodologies or standards, and fewer "project offices." I think of the decisions review to tidy up the framework for a project as a "bookend" to lessons learned – a chance to actually respond to things that have not gone so well in the recent past when you are initiating a new project. It is also a useful place to be skeptical and question any choices made organization-wide that may no longer make much sense. (I have a new book coming out in July: "Results without Authority," that goes into this in a good deal more detail.)

Another bias I have comes from the 20+ years I spent doing projects at Hewlett-Packard. I took early retirement from HP last week, but the principle that projects are mainly about people is one that I am unlikely to surrender. I have seen a lot more projects fail because of conflicts and poor motivation than from faulty Gantt charts and imperfect WBSs. Dave Packard and Bill Hewlett both believed in "Management by wandering around" – building relationships and interpersonal trust. It is central to the so-called "HP Way", and remains strongly encouraged for all HP managers and leaders. MBWA is certainly about listening, but it is really more than that. Projects, especially today's "virtual team" projects, are all at risk when the project leader fails to understand this.

Anyway, this has rambled on long enough. Thanks again for your review, and if you have any more thoughts or comments, let me know.

Tom Kendrick
San Carlos, CA

- ¹ Kendrick, T., *The Project Management Tool Kit*, AMACOM, NY, 2004
- ² Ref. Wideman Glossary: *Process* = a set of activities to achieve an output [D012611]; *Procedure* = a prescribed method for performing specified work [D01255]; *Technique* = skilled means to an end [D02022]
- ³ *The Project Management Tool Kit*, pp xii-xv
- ⁴ *Ibid*, p51
- ⁵ *Ibid*, p53
- ⁶ *Ibid*, p55-56
- ⁷ *Ibid*, p67
- ⁸ *Ibid*, p175
- ⁹ *Ibid*, p113
- ¹⁰ *Ibid*, pp113-116
- ¹¹ *Ibid*, p92
- ¹² *Ibid*, p18
- ¹³ *Ibid*, p xi
- ¹⁴ MBWA = Management By Walking Around