

**Basic Project Management: Two learning books**  
**An Introduction to Project Management, 2<sup>nd</sup> Edition by Kathy Schwalbe**  
**&**  
**Successful Project Management, 4<sup>th</sup> Edition by Jack Gido & James Clements**  
**(Book reviews by R. Max Wideman)**  
 Published November 1<sup>st</sup>, 2009

### ***Introduction***

Generally, we like to review books that appear to bring some new ideas to the discipline of project management, program management or project portfolio management. Upon review we may or may not be disappointed, but every author seems to have some new insight that is worth capturing. But what about the interests of those who are just entering into the field of project management, whether as a team member or as an "accidental" leader? What sort of material are they being offered and how sound is it? Are we still in touch with the basics or, conversely, are authors of primers keeping up to date?

Of course there are far too many books out there to do a comprehensive study but a simple sampling might be useful. So, to test this thought we selected a couple of books for comparison, focusing on commonalities rather than disparities. The two books we settled on are: *An Introduction to Project Management*, 2nd Edition by Kathy Schwalbe and *Successful Project Management*, 4th Edition by Gido & Clements. The commonalities are that:

- Authors Kathy Schwalbe and Jack Gido are both respected and active members of the Project Management Institute ("PMI"),
- Both books are in the 400-500 page range,
- Both books contain extensive examples, questions & answers, and case studies, suited to both formal training and personal reading,
- Both books are supported by additional materials on a companion web site,
- Both books include a CD containing Microsoft® Office Project 2007, 60-day trial software, and
- Both books were published in 2009 by the Cengage Learning group.

Given the similarities, we may expect that the differences will be in the quality of the content and the manner of presentation. One difference from the outset, however, is that Kathy's book, *An Introduction to Project Management*, is soft cover, while Jack's book, *Successful Project Management*, is hard cover.

### ***About the authors***

#### ***An Introduction to Project Management***

Kathy Schwalbe is a professor teaching project management at Augsburg College in Minneapolis. She has a Ph.D. from the University of Minnesota and holds an MBA from Northeastern University. She specializes in problem solving for business, systems analysis and design, information systems projects, and electronic commerce. Prior to entering academia she spent ten years in industry. Her book offers a general yet concise introduction to project management and "provides up-to-date information on how good project, program, and portfolio management can help you achieve organizational success. It includes over 50 samples of tools and techniques applied to one large project, and is suitable for all majors, including business, engineering, liberal arts, healthcare, and more. The text uses a chronological approach to project management, with detailed explanations and examples for initiating, planning, executing, monitoring and controlling and closing projects."<sup>1</sup>

### ***Addendum***

It is our practice to submit drafts of our book reviews to the authors to allow them to examine our observations ahead of time. This enables them to point out any errors of fact that we can correct accordingly before publication. In this case, we found that Kathy Schwalbe is publishing a *Third Edition* of her book to reflect the changes in The PMBOK® Guide, Fourth Edition (2008). For Kathy's comments about the new version of her new book and its availability, see **Postscript** below for more information. The corresponding page references to her new book are shown thus: [nn].

### ***Successful Project Management***

Jack Gido is a former director of the Pennsylvania Technical Assistance Program at Penn State University. He has twenty years of industrial management experience including productivity improvement and manufacturing technology programs for General Electric and Mechanical Technology. He holds an MBA from the University of Pittsburg.<sup>2</sup> James Clements, co-author, is the Provost and Vice President for Academic Affairs and the Robert W. Deutsch Distinguished Professor of Information Technology at Towson University. He has a Ph.D. in operations analysis from the University of Maryland Baltimore County.<sup>3</sup> Their book "covers everything you need to know about working successfully in a project environment, including how to organize and manage effective project teams. Communication is also emphasized, with a focus on how to document and communicate project developments. In-depth coverage of planning, scheduling, and cost management is also provided."<sup>4</sup>

### **Book Structures**

#### ***Schwalbe - An Introduction to Project Management***

This book has eight chapters and three Appendices as follows:

Preface

1. An Introduction to Project, Program, and Portfolio Management
2. Project, Program, and Portfolio Selection
3. Initiating Projects
4. Planning Projects, Part 1 (Project Integration, Scope, Time, and Cost Management)
5. Planning Projects, Part 2 (Project Quality, Human Resources, Communications, Risk, and Procurement Management)
6. Executing Projects
7. Monitoring and Controlling Projects
8. Closing Projects and Best Practices

Appendix A – Guide to Using Microsoft Project 2007

Appendix B – Advice for the Project Management Professional (PMP) Exam and related Certifications

Appendix C – Resources

As the reader will observe, chapters 3 through 8 follow PMI's PMBOK® Guide and its five Project Management Process Groups which it uses as a foundation.<sup>5</sup> However, according to the author, the book goes beyond that by providing more details, highlighting additional topics, and providing a real-world context for project management.<sup>6</sup>

#### ***Gido - Successful Project Management***

This book has thirteen chapters and four Appendices as follows:

Part 1 - The Life of a Project

1. Project Management Concepts
2. Needs Identification
3. Proposed Solutions
4. The Project

Part 2 - Project Planning and Control

5. Planning
6. Scheduling
7. Schedule Control
8. Resource Considerations
9. Cost Planning and Performance

Part 3 – People: The Key to Project Success

10. The Project Manager
11. The Project Team
12. Project Communication and Documentation
13. Types of Project Organization

Appendix A – Project Management Software

Appendix B – Project Management Organizations Around the Globe

Appendix C – Project Management Websites

Appendix D - Abbreviations

As the authors explain: "Project management is more than merely parceling out work assignments to individuals and hoping that they will some how accomplish a desired result. In fact, projects that could have been successful often fail because of such take-it-for-granted approaches. Individuals need hard information and real skills to work successfully in a project environment and to accomplish project objectives" and "[the book] is written for everyone involved in projects, not just project managers."<sup>7</sup>

## What we liked

### *Schwalbe - An Introduction to Project Management*

This book provides very thorough coverage of the subject at an entry level, especially for members of a project team up to and including junior project managers. It is easy to read and is thoroughly illustrated by diagrams, sketches, charts, software screen shots, examples of document templates, and worked examples. To relieve the burden of learning, occasional Dilbert cartoons are included to add humor and illustrate a point.

As might be expected from the chapter structure, the content follows the well-trodden path of project management as represented by PMI's PMBOK® Guide and as generally promulgated by PMI. However, it is explicit and much easier to understand. Moreover, while the first two chapters are essentially the "what-is" of project management, all subsequent chapters are definitely about "how-to". As a training handbook, this is as it should be – and makes it significantly different from the PMBOK® Guide which is a "what-is" document throughout its text.

As Kathy says: "The *PMBOK® Guide* is a **standard** that describes best practices for *what* should be done to manage a project. A **methodology** describes *how* things should be done."<sup>8</sup> So we were particularly gratified to see that Chapter 3, Initiating Projects, recommends starting out with a Business Case to justify investment<sup>9</sup> and that a Project Charter comes later to authorize commitment of resources

for creating the product.<sup>10</sup>

Each chapter opens with a case study example of the ensuing chapter contents and closes with outcomes of the same case study to further illustrate the chapter's content. Each chapter also concludes with a Chapter Summary, a multiple-choice Quick Quiz, Discussion Questions, Exercises, Team Projects, relevant information on the companion web site (you need to login), a list of Key Terms used in the chapter, and End Notes listing references. It is all very thorough.

One illustration caught our attention in particular - see Figure 1.

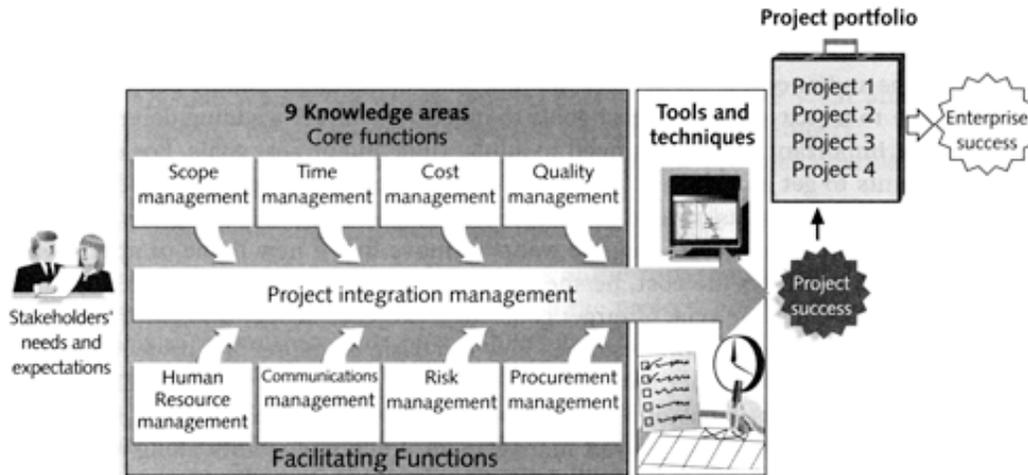


Figure 1: Project management framework<sup>11</sup>

This seems to us to bear a remarkable similarity to the graphic shown in Figure 2 that a group of us developed back in 1990. There is, however, one important exception. Our diagram assembles the project management functions in a logical and practical sequence.

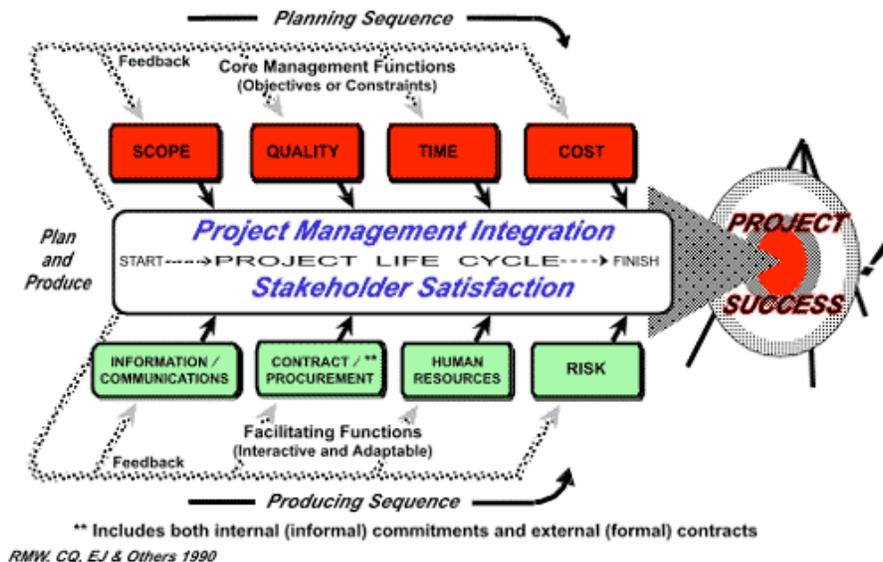
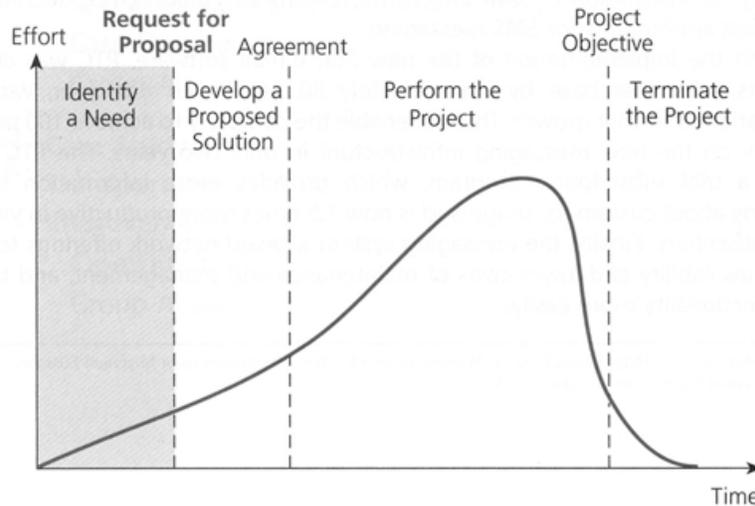


Figure 2: A 1990 model of project management success<sup>12</sup>

**Gido - Successful Project Management**

Authors Jack Gido and James Clements take a different approach to the structure of their book compared to Kathy Schwalbe. In *Successful Project Management*, the four chapters of Part 1 describe the contents of a very commendable four-phase "generic" project life span shown in Figure 3. Aside from a rather unrealistically shaped effort curve, the phase labels are more practical than those used in PMI's PMBOK® Guide and, as implied by the "Request for Proposal", the project assumes a contractual environment. The four chapters take you through what to expect or what is involved in each phase and, by extension, what you should do but not necessarily in "how-to" terms.



**Figure 3: Project Life Cycle<sup>13</sup>**

Parts 2 and 3 of the book deal with the so-called "technical" side (i.e. *not* the project's technology) and "people" side of project management respectively. As our Book Structures page shows, the contained chapters deal with each of these sides based on a series of topic areas that generally follow the topics covered by PMI's PMBOK® Guide. Of the two Parts, *Project Planning and Control* is by far the larger.

Throughout the book, every chapter is well illustrated by worked examples of charts, diagrams, and screen clips. In addition, every chapter includes not only fabricated case studies but also project write-ups of *Real-World Vignettes*, followed by a short set of *Case Questions* for class discussion. All the content is presented as valuable information to be learned. In other words, the reader has to exercise some understanding when presented with a real project. In short, the reader has to *think*.

The book is full of solid stuff following a well-trodden path. Here and there, there are some semi-humorous pieces such as the following *Code of Conduct for Team Meetings* attributed to the "New Pig Corporation":<sup>14</sup>

- Stick to the topic at hand.
- Arrive on time and end on time.
- One person talks at a time.
- Everyone has the responsibility to participate. Be prepared.
- Be frank, honest, and sincere.
- Limit sarcastic and cynical remarks to zero.
- The overall tone of the meetings will be positive.
- Eliminate negativity.
- Make criticism constructive.

- Pay attention. Seek first to understand, then to be understood.
- No gossip.
- Ideas belong to the group, not to the individual.
- The team speaks with one voice after the decision is made. Leave united.
- Reinforce positive behavior.
- Keep your cool. If you lose it, you are wrong – no one else.

Successful implementation of this wonderful list of idealistic motherhood would make any project manager proud. Unfortunately, the practical project reality is that when you have assembled a group of project people passionately dedicated to an objective, inevitable conflicts arise that, together with office politics no doubt, disrupt this utopian vision.

## **Downside**

### ***Schwalbe - An Introduction to Project Management***

We have to say that we were disappointed to see a whole page dedicated to *The Triple Constraint*.<sup>15</sup> Clinging to this obsolete construct suggest that the adherent does not have a fundamental grasp of project management. Kathy observes that "Every project is constrained in different ways by its scope, time and cost goals." That is true, but it is also constrained by the need to satisfy its quality goals. You can meet the first three but fail miserably on quality, in which case we guarantee that the product will be a failure. The truth is that scope and quality requirements are the input to the project execution/product creation phase resulting in the time and cost consequences. This is how the four fundamental variables of project management scope, quality, time and cost, knit together.<sup>16</sup>

We had a further concern around the Project Management Process groups, namely: Initiating, Planning, Executing, Monitoring & Controlling, and Closing processes. Kathy says that:<sup>17</sup>

"All projects use the five process groups as outlined in the following list:

- Initiating processes included actions to begin or end projects and project phases . . ."

We believe that this statement further adds to the confusion wrought by PMI in using confusing labels.

The process groups are intended to apply at a lower level in the project management activity hierarchy, that is, to each individual task and upwards. Which means that these process groups are incurred repeatedly throughout the project. However, when it comes to the project's overall life span, this sequence may or may not be used.<sup>18</sup> In fact it is better if a separate methodology is applied for appropriate executive project control, especially in a portfolio management environment.<sup>19</sup> We think this is implied when Kathy says: "A **methodology** describes *how* things should be done"<sup>20</sup> as we noted earlier.

### ***Gido - Successful Project Management***

We were a little disappointed to see that the Work Breakdown Structure (WBS) was given such short shrift given its fundamental importance in establishing the scope of the project's product. Although mentioned in several places throughout the book,<sup>21</sup> apart from a WBS description there is little guidance to the reader on how to develop and apply the WBS tool.

Once again we were disappointed by the pitiful treatment of "quality". The attainment of an appropriate level of quality in the product produced by the project, i.e. a quality grade suited to the product

requirements, is probably the one thing that long outlasts cost and schedule issues in project management. It is fundamental to the success of the project endeavor whichever way "success" may be defined.

Unfortunately, we could not find any reference to quality anywhere in the Table of Contents, the Glossary, or in the book's Index. The best we could find is the following statement listed under the attributes of a project:

"Furthermore, it is expected that the work scope will be accomplished in a *quality manner* and to the *customer's satisfaction*."<sup>22</sup>

What does "*quality manner*" and "*customer's satisfaction*" mean in practical terms? While no doubt laudable, neither of these is expressed in objective and measurable terms. There is an old adage that says: "What gets measured gets managed." The implication is that what is not measurable does not get managed and so quality, as in "quality grade", appears to be a nonentity in this book. Without actually mentioning it, Jack Gido and James Clements fall into exactly the same "Triple Constraint" trap as our previous author Kathy Schwalbe. As we said earlier: "scope and quality requirements are the input to the project execution/product creation phase resulting in the time and cost consequences. This is how the four fundamental variables of project management scope, quality, time and cost, knit together."<sup>23</sup>

Doesn't anyone on the project management training circuit every learn? Doesn't anyone do their homework? Or are we forever condemned to parrot an "approved" committee-driven view of the project management discipline?

## Summary

Both books reviewed in this paper do contain a lot of good information with extensively worked examples and illustrations. As such they represent a lot of hard work on the part of the authors and it is easy to be critical. Producing a book of the proportions of these takes a lot of dedicated time and effort and writing a book is not a trivial project.

The two books reviewed take different approaches to their contents. Kathy Schwalbe's book is essentially a "how-to" book, i.e. prescriptive, while Jack Gido and James Clements' book takes a more descriptive approach. We feel that generally the Schwalbe book is more suited to those first entering project management, especially in an in-house tech project environment. On the other hand, we feel that the Gido book would be more suited to those with several years of project experience but who now find themselves in need of more formal training.

Both books have some important shortcomings (in our view), so we think a good solid training book that is really up-to-date has probably yet to be written. As to recommending one over the other, it all depends on what you are looking for.

## Postscript

As noted in our Introduction, it is our practice to submit drafts of our book reviews to the respective authors in advance of publication. This allows them to point out any errors of fact so that we can correct accordingly. In this case, in response Kathy Schwalbe announced the *Third Edition* of her book to reflect the changes in The PMBOK® Guide, Fourth Edition (2008) and had this to say:

By Email Thu, 30 Jul 2009, Kathryn Schwalbe to R. Max Wideman

Hi Max,

Thanks for sending your draft article. I enjoy visiting your Web site from time to time and link to it on my Web site.

If you have time, you really should review the third edition of my book, coming out next week. If you send me a good mailing address, I'll send you a copy. Below is what I have in the preface about what's new in the third edition:

### **New to the Third Edition**

Building on the success of the previous editions, *An Introduction to Project Management, Third Edition* introduces a uniquely effective combination of features. The main changes to the third edition include the following:

- The text is updated to reflect changes in the latest PMBOK® Guide, Fourth Edition, published by PMI in December 2008.
- The text now includes nine chapters instead of eight. The previous chapter 8 included information on Closing and Best Practices. These two topics are now broken into two separate, shorter chapters.
- Appendix A, Brief Guide to Microsoft Project 2007, has been rewritten and provides an example based on performing a three-month class project. New exercises are provided as well based on my experience of teaching students to use this powerful software.
- There is a new appendix, Appendix B, Brief Guide to @task, which provides information on using the number one online project management software, @task. It provides step-by-step instructions on creating a project in @task, importing a Project 2007 file, and using portfolio management features.
- Appendix C, Resources, includes information about the companion Web sites, a list of available template files, three running case studies, information about using the Fissure project management simulation software, and instructions for accessing information about the Project Management Professional (PMP) and related certifications. The Fissure simulation software is still available as a separate purchase from [www.ichapters.com](http://www.ichapters.com). Detailed instructions for using the simulation are available on the companion Web site.
- The Dilbert and other cartoons have been replaced with relevant (and funny) cartoons from [xkcd.com](http://xkcd.com).
- The companion Web site no longer requires a password. Simply go to <http://groups.google.com/group/intropm> to access it. Instructors must contact me directly ([schwalbe@augsborg.edu](mailto:schwalbe@augsborg.edu)) to gain access to the instructor site.
- Updated Jeopardy games are included on the companion Web site for each chapter. You can use these as review games in a classroom setting, or you can go through them on your own to help reinforce your understanding of key terms and other concepts in each chapter. Sorry, but podcasts are no longer provided.
- Updated examples and references are provided throughout the text, and user feedback is incorporated.

In our **Downside** section, we did make a bit of an issue around a whole page being dedicated to *The Triple Constraint*.<sup>24</sup> Interestingly, Kathy recognized the problem here and beat us to it in her *Third Edition*. The original section has now been re-titled and rewritten as follows:

## Project Constraints

Every project is constrained in different ways. Some project managers focus on scope, time, and cost constraints. These limitations are sometimes referred to in project management as the triple constraint. To create a successful project, a project manager must consider scope, time, and cost and balance these three often-competing goals. He or she must consider the following:

- **Scope:** What work will be done as part of the project? What unique product, service, or result does the customer or sponsor expect from the project?
- **Time:** How long should it take to complete the project? What is the project's schedule?
- **Cost:** What should it cost to complete the project? What is the project's budget? What resources are needed?

Other people focus on the quadruple constraint, which adds quality as a fourth constraint.

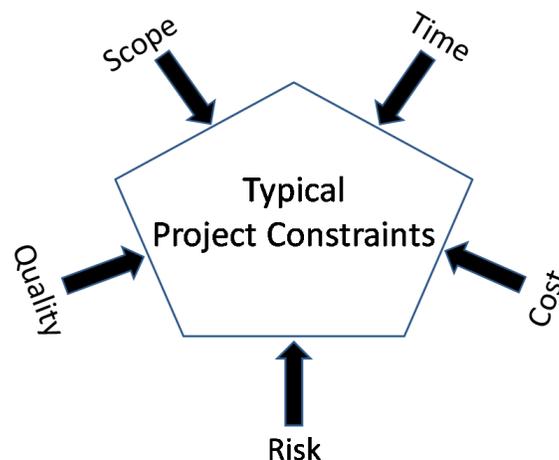
- **Quality:** How good does the quality of the products or services need to be? What do we need to do to satisfy the customer?

The PMBOK® Guide, Fourth Edition suggests these four constraints plus risk.

- **Risk:** How much uncertainty are we willing to accept on the project?

Figure 1-2 [Figure 4] shows these five constraints. The triple constraint goals—scope, time, and cost—often have a specific target at the beginning of the project. For example, a couple might initially plan to move into their new 2,000 square foot home in six months and spend \$300,000 on the entire project. The couple will have to make many decisions along the way that may affect meeting those goals. They might need to increase the budget to meet scope and time goals or decrease the scope to meet time and budget goals.

The other two constraints—quality and risk—affect the ability to meet scope, time, and cost goals. Projects by definition involve uncertainty, and the customer defines quality. No one can predict with one hundred percent accuracy what risks might occur on a project. Customers cannot define in detail their quality expectations for a project on day one. These two constraints often affect each other as well as the scope, time, and cost goals of a project.



**Figure 4: Typical project constraints**

For example, the couple may have picked out a certain type of flooring for most of their home early in the design process, but that supplier may have run out of stock, forcing them to choose a different flooring to meet the schedule goal. This may affect the cost of the project. Projects rarely finish according to the discrete scope, time, and cost goals originally planned. Instead of discrete target goals for scope, time, and cost, it is often more realistic to set a range of goals that allow for uncertainties, such as spending between \$275,000 and \$325,000 and having the home completed within five to seven months. These goals allow for inevitable changes due to risk and quality considerations.

On some projects, other constraints may be more important than scope, time, cost, quality, or risk. Experienced project managers know that you must decide which constraints are most important on each particular project. If time is most important, you must often change the initial scope and/or cost goals to meet the schedule. You might have to accept more risk and lower quality expectations. If scope goals are most important, you may need to adjust time and/or cost goals, decrease risk, and increase quality expectations.

If communications is most important, you must focus on that. If there are set procurement goals or constraints, that knowledge might be key to the project. In any case, sponsors must provide some type of target goals for a project's scope, time, and cost and define other key constraints for a project. The project manager should be communicating with the sponsor throughout the project to make sure the project meets his or her expectations.

How can you avoid the problems that occur when you meet scope, time, and cost goals, but lose sight of customer satisfaction? The answer is *good project management, which includes more than meeting project constraints*.

Aside from the changes that Kathy has listed above, a few of the other things we noted about the *Third Edition* is that the Table of Contents has been cleaned up and simplified, and that the rearrangement of Chapter 8 into two chapters 8 and 9 makes more sense. The *Appendix A* (Guide to Using Microsoft Project 2007) has been condensed by some 25% to make room for the *Appendix B*, a *Brief Guide to @task*, referred to as an online project management software tool. It should be noted that *@task* is not a network scheduling tool like *MS Project* with which most people are familiar. Rather, it is an on-line data warehouse service designed to facilitate project team collaboration in the exchange of "project management processes" data. This way, it is hoped that aggregating and reporting project data electronically, as well as eliminating hard copy distribution and redundant face-to-face meetings, can save significant project man-hours.

As a minor point, Kathy's *Third Edition* book has about the same footprint and about the same amount of content as her *Second Edition*. However, because of changes in page layout, the fonts used and paper thickness, the *Third Edition* is about 40% thicker. Notwithstanding, the good news is that as a self-published product, the price is substantially lower.

R. Max Wideman  
Fellow, PMI

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<sup>1</sup> Schwalbe, K., *An Introduction to Project Management, Second Edition*, Course Technology – Cengage Learning, MA, back cover

<sup>2</sup> Gido, J., *Successful Project Management*, 4th Edition, South-Western – Cengage Learning, OH, p xvii

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- <sup>3</sup> Ibid.
- <sup>4</sup> Ibid, back cover.
- <sup>5</sup> *PMBOK® Guide, Third Edition*, Project Management Institute, PA, 2004, p38
- <sup>6</sup> Schwalbe, p xii [p iii]
- <sup>7</sup> Gido, p x
- <sup>8</sup> Schwalbe, p75 [p81]
- <sup>9</sup> Ibid, p85 [p90]
- <sup>10</sup> Ibid, p89 [98]
- <sup>11</sup> Ibid, Figure 1-3, p8 [p8]
- <sup>12</sup> From our personal archives of files when graphics capability was distinctly limited
- <sup>13</sup> Gido, Figure 2.1, p30
- <sup>14</sup> Ibid, p383
- <sup>15</sup> Schwalbe, pp5-6 [pp6-8]
- <sup>16</sup> For a more detailed discussion, see my Musings: *Triangles, Sex and Simplicity* here: <http://www.maxwideman.com/musings/irontriangle.htm>
- <sup>17</sup> Schwalbe, p71 [p77]
- <sup>18</sup> For a more detailed discussion, see my Paper: *Section II – The Standard for Project Management of a Project, Downside* here: <http://www.maxwideman.com/papers/pmbok3/section2.htm>
- <sup>19</sup> For a more detailed discussion, see my Paper: *The Role of the Project Life Cycle (Life Span) in Project Management* here: <http://www.maxwideman.com/papers/plc-models/intro.htm>
- <sup>20</sup> Schwalbe, p75 [p81]
- <sup>21</sup> Gido, pp12 & 14-15: example; 116-117: repeat of example; 128-129: referenced in scheduling; 134-135 second example
- <sup>22</sup> Ibid, p6. The term "quality manner" is repeated again subsequently on pp20, 22
- <sup>23</sup> See Endnote #16 above.
- <sup>24</sup> Schwalbe, pp5-6 [pp6-8]