

Handling Difficult Project Situations

A Critical Skill for Every PM

This seminar provided by

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The latest version of this seminar is at

www.ManageProjectsBetter.com

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Difficult Situations

Many difficulties exist for PMs



Most are not handled well



Negative impacts usually result when not adequately addressed



Content

We will do the following.....

- Look at specific issues
- Look at specific solutions
- Look at general solutions

My Sponsor/Manager Has No Clue About What PM Is

My Sponsor/Manager Has No Clue About What PM Is

- A crash course on PM alone would not turn poor sponsors into a good one but would provide some awareness
- If I am a PM and my sponsor has little knowledge about managing projects, I would want to educate my sponsor on the things that must be done and in what order. I would also want to include examples of what will happen if those project management fundamentals are not followed.
 - We need requirements because.....
 - A plan is essential because.....
 -
- If I am a sponsor with little or no PM experience, I should have the sense to ensure a competent PM is assigned to each of my projects and then to build a good working relationship with each project manager.

Handling Difficult Project Situations Bottom Line, What to Do

Learn and apply all project management fundamentals, i.e. follow the laws of projects, educate others

Be a leader, do the right thing and build a good working relationship with your team

Build a good working relationship with your sponsors/management



Handling Difficult Project Situations Bottom Line, What to Do

Build communication skills and learn when to communicate certain things to certain stakeholders at certain times.....and then do it

Learn the basics of teamwork and collaboration and apply to your team

Adopt the mindset that "doing the right thing" is "doing the right thing"



LEADERS ARE PEOPLE WHO DO THE RIGHT THING. MANAGERS ARE PEOPLE WHO DO THINGS RIGHT.
MARTIN LUTHER KING

Many Difficult Project Situations Can Be Due to Lacking PM Skills or Inaction

Every PM will need many skills and apply those skills to be successful, examples are ...

PM Fundamentals - Requirements, Planning, Controls, ...

People and Communication Skills, Team Management

Project Work Specific Knowledge and Skills

Business Acumen, Financial and Contracts Knowledge

Knowledge of the Respective Customer Environment

....and more....

Other Difficult Project Situations Can Be Due to the Project's Environment

*A number of environmental factors exist,
examples are ...*

Organization Culture

Leadership's Knowledge of Project Management

Organization Pressures on Leadership

Market and Economic Environments

Customer Cultures and Mindsets

Customer and Leadership Skills

....and more....

PMs Must Respond to Different Difficult Project Situations In Different Ways

PM Can Control Root Cause

Many Difficult Project Situations Can Be Due to Lacking PM Skills or Inaction

Every PM will need many skills and apply those skills to be successful, examples are ...

PM Fundamentals - Requirements, Planning, Controls, ...
People and Communication Skills, Team Management
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Business Acumen, Financial and Contracts Knowledge
Knowledge of the Respective Customer Environment
....and more....

PM Must Be Proactive

PM Cannot Control Root Cause

Other Difficult Project Situations Can Be Due to the Project's Environment

A number of environmental factors exist, examples are ...

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Leadership's Knowledge of Project Management
Organization Pressures on Leadership
Market and Economic Environments
Customer Cultures and Mindsets
Customer and Leadership Skills
....and more....

PM Must Be Reactive

Some Common Project Difficulties

My environment does not support time for planning nor sees the need for planning

It Takes Too Long To Plan

My Customer Is Not Able to Tell Me What They Want

My Sponsor Assigns Me the Project and Then Disappears

My Sponsor/Manager Has No Clue About What Project Management Is

We Have A Number Of Project Stakeholders, But No Role Definitions Exist, Many are Giving Direction and Making Decisions

I Am Taking Over A Project Underway and the Requirements Are Not Right, What Should Be Done?

I have been asked to take over a troubled project, what do I do?

I am assigned to a project where I have very limited technical knowledge, what should I do?

I am assigned to too many projects

My Boss Is Micromanaging My Projects

I am working on a project where the internal day to day project management work is a full time job and then handling the external interfaces with stakeholders is a full time job

I do not have the right resources for my project

One team member is not performing

I am working on a project where no completion conditions are defined

Communications are important but too there are too many emails, horrible meetings and "distant" management sessions, how to handle?

My organization does not define the role or decision authority for PMs making it hard for me to get team members to follow my direction

My team is not working well together, what can I do

*My Environment Does Not
Support Time For Planning
Nor Sees The Need For
Planning*

My environment does not support time for planning nor sees the need for planning.

Several things can be done

- Educate management and customers on the need for planning and the time required to plan
- Communicate impacts of a lack of plans, using past troubled projects as evidence of *“what we do not want to repeat!”*
- Instill the need for a plan in the team, lead the planning, involve the team
- Use a rolling wave approach to planning
 - Detail plan for initial period
 - Top level plan for entire projects
 - As initial period is completing, form plan for the next period

It Takes Too Long To Plan

It Takes Too Long to Plan

To Move Planning Along Faster

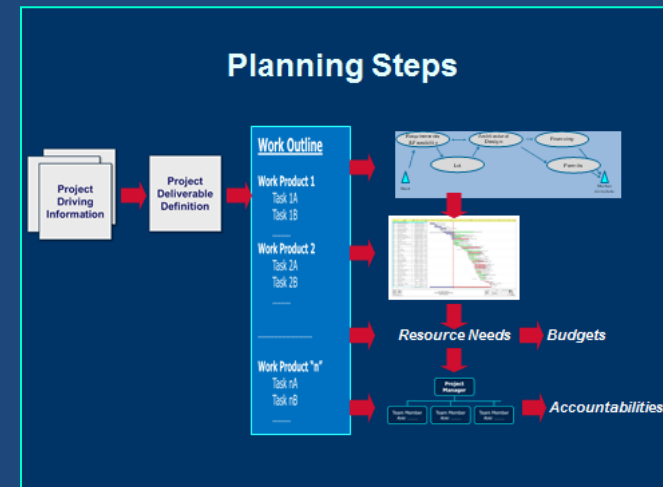
- Get The Project's Driving Information In Order
 - Requirements For The Project's Deliverable
 - Definition Of What The Project Will Deliver
 - Project Constraints – Budget, Schedule, Regulatory,
- Do Not Plan Until Driving Information Is Maturing
- Think, Talk And Decide Before Touching Tools



It Takes Too Long to Plan

To Move Planning Along Faster

- Get A High Level Plan In Place And Only Prepare A Detail Plan For The Near Term Timeframe
- Parallel Planning With Initial Project Work
- Use A Planning Process \longleftrightarrow



See planning tutorial on web site

*My Customer Is Not Able
to Tell Me What They Want*

My Customer Is Not Able to Tell Me What They Want

Why would this be?

- Customers are not usually experts in assembling, documenting and communicating needs, so help them
- Customers may be looking for a “blank check,” so be careful
- Customers may have many diverse internal interests making a singular set of requirements difficult, so work to form a set of consolidated requirements
- Customers may not understand the critical need of requirements, so explain
- Customers maybe accustomed to having a project start and then guide it with requirements as they surface, this can be ok if the customer is flexible on schedule and budget but this will not work for fixed constraints

My Customer Is Not Able to Tell Me What They Want

What Can a PM Do?

A PM can use some of the following techniques

- Ask what specific “outcomes” the customer is looking for
 - You DO want the customer to defined what the bottom line outcome is, but
 - Generally, you do NOT want the customer defining design details
 - Generally, you do NOT want the customer defining implementation details
- You might show the customer examples of outcomes and capture their likes and dislikes
- Write a “straw man” specification for your customer to review
- Make your project into two phases
 - Phase I – Decide what is needed, then propose budget and schedule
 - Phase II – Perform the project

My Customer Is Not Able to Tell Me What They Want

What Can a PM Do?

A PM can use some of the following techniques

- Use simulations or prototypes to show customers potential project outcomes
- Make sure great communication happens during requirements generation, involve all appropriate customer stakeholders
- Define a single customer focal point for all requirements discussions is in place

*My Sponsor Assigns Me
the Project and Then
Disappears*

My Sponsor Assigns Me the Project and Then Disappears

Why would a sponsor do that?

- They are too busy with other work or,
- They were assigned, but did not want to be the sponsor, or
- They may lack PM experience, or
- They may lack knowledge of the work, or
- They may not understand the role or importance of being a sponsor

If I am the PM and my sponsor is not engaged, I might

- Brief the sponsor on what the project is and what you will be doing
- Maintain a focus in these discussions on risks to success and what the sponsor might do now or in the future to reduce those threats
- Periodically meet with the sponsor to provide information about the project's on-going activities even if no sponsor action is needed
- Ask you sponsor's advice on things

*My Sponsor / Manager
Has No Clue About What
Project Management Is*

My Sponsor / Manager Has No Clue About What Project Management Is

- Send them to a crash course on PM? Maybe, probably of little value
- Educate the sponsor on the things that must be done and in what order, focus on topics such as.....
 - We need requirements because.....
 - A plan is essential because.....
 - If these things are not done, *remember project "A" and project "B"*
- If you are a sponsor with little or no PM experience, ensure a competent PM is assigned to your projects and work to build your PM knowledge
- Have them review this seminar

*We Have A Number Of
Project Stakeholders, But
No Role Definitions Exist,
Many are Giving Direction
and Making Decisions
Causing Chaos*

No Stakeholder Roles

It is a good idea to build some type of matrix to identify all stakeholders, their specific accountabilities and decision authorities and to include that information in the project charter or project definition for all to understand.

Consider Doing the Following

- You might distribute a blank form and have all stakeholders define their role, then meet to finalize, or
- You might draft a set of roles and decision authorities and distribute for comment

Ensure All Stakeholder Accountabilities and Decision Authorities are Established and Accepted

<u>Stakeholders</u>	<u>Accountable For...</u>	<u>Decision Authority</u>
• Customers	• Xx	• Yy
• Users	• Xx	• Yy
• Operators	• Xx	• Yy
• Maintainers	• Xx	• Yy
• Management	• Xx	• Yy
• Sponsor	• Xx	• Yy
• PM	• Xx	• Yy
• Team	• Xx	• Yy
• Developers	• Xx	• Yy
• Testers	• Xx	• Yy
• Customer Service	• Xx	• Yy
• Suppliers	• Xx	• Yy
• Legal and Contracts	• Xx	• Yy
• Regulators	• Xx	• Yy
•	• xx	• yy

Related Terms

Role – “What Position a Person Plays”, can be long term organizational role or a short term special assignment

Accountability – “What Specific Things a Person is Responsible For”

Authority – What decisions a given individual is empowered to make

Skills – Capabilities an individual has related to specific functions

Attributes – Characteristics of the individual, these maybe necessary or desirable for a given role

*I Am Taking Over A Project
Underway and the
Requirements Are Not
Good, What Should I Do?*

Poor Requirements

- A project with bad requirements is a project that will probably deliver the wrong thing, so this must be resolved
- Where significant issues exist with requirements, taking a pause in the project to 1) redefine the requirements, 2) redefine the deliverable and then to 3) re-plan the project, are necessary steps
- Where many requirements are OK and some small number of requirements need redefinition, then project work usually can continue
- Use requirements generation techniques mentioned earlier in this seminar to develop a good requirements baseline

*I Have Been Asked To Take
Over A Troubled Project,
What Do I Do?*

I have been asked to take over a troubled project, what do I do?

Step 1 – Set Stakeholder Expectations

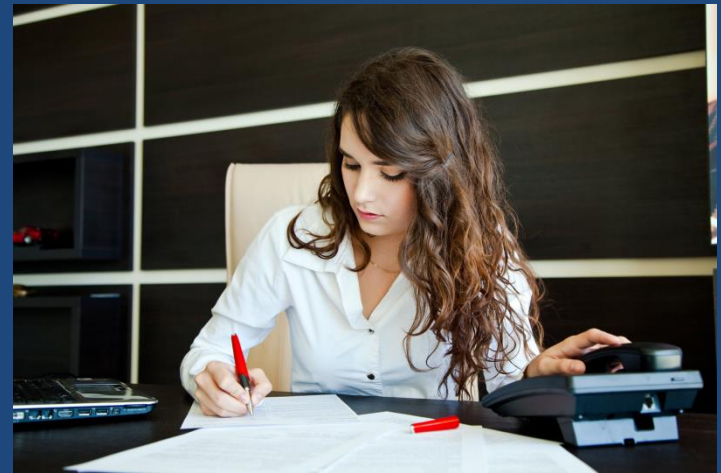
- Tell sponsors and or management that time will be required, set their expectations as such and that you will brief them when you know more, make NO commitments
- Tell the team that you want to understand the project before any changes are considered, ask for their support and tell them you want to make the project better for all



I have been asked to take over a troubled project, what do I do?

Step 2 – Then Don't Talk, Do Read Look and Listen

- Understand what agreements have been made with the customer and what the customer is expecting
- Review the project requirements baseline, the definition of the deliverable and the plan
- Talk to team members individually to understand their view of what the project is, what is good and what is not good



I have been asked to take over a troubled project, what do I do?

Step 3 – Formulate what must change and review with appropriate stakeholders for feasibility and acceptance

Step 4 – Work with the team to revise project requirements and the deliverable definition in that order

Step 5 – With the team, modify the existing plan or develop a new plan using the new requirements and deliverable definition

*I Am Assigned To A Project
Where I Have Limited
Technical Knowledge,
What Should I Do?*

I am On A Project and Have Limited Knowledge About the Work

Consider DOING some of the following

- Ask yourself, does management understand my skills?
- Ask for re-assignment if this project is way beyond your skills
- Determine how fast can you learn
- Find a technical deputy to support you
- Build a good working relationship with the team
- Focus on PM fundamentals, have the team handle the technical details

Do NOT do the following

- Negotiate agreements with customers or subcontractors on requirements, work scope or the plan; the team must be involved
- Try to convince the team you know more than you do, they will figure that out quite quickly
- Give up before you know if you can do this or not

*I Am Assigned To
Too Many Projects*

I Am Assigned To Too Many Projects

How Did You Get Into This Situation?

- A. I never say NO
- B. Our organization has too few PMs
- C. I under-estimate the time required for new projects I accept

What is the Situation with Management?

- 1) Management is unaware
- 2) Management is aware, but has no alternatives
- 3) Management is aware, has alternatives but is not implementing them

Being aware of how you ended up with too many projects will help you in the future

I Am Assigned To Too Many Projects

For Now

- Do a great job of time management and prioritizing your work load. Often these methods can make a very difficult workload somewhat doable.
- Communicate to management issues that are surfacing and risks that might surface due to the fact that projects are not being given enough attention. Whining and complaining will not work, but sound, accurate and constructively communicated facts may help.
- Review your answers to the questions on the previous slide and work with management to make things better in the future.

*My Boss Is Micromanaging
My Projects*

My Boss Is Micromanaging My Projects

Not an easy thing to resolve, try to understand

WHY this is happening

- 1) The boss feels more comfortable working on project level things vs. being a manager / leader
- 2) The boss has been brought up in an environment where they were micro-managed and sees it as being “what is done”

If one or both of these situations exist, there may be little that you can do

My Boss Is Micromanaging My Projects

WHY this is happening (more reasons)

- 3) The boss feels that if they do not get involved in most or all of the project decisions, things will go wrong
- 4) The boss is not convinced the PM has the skills to do the job

If one or both of these above situations exist, consider the following ...

- Do a great job to build your credibility with your boss over time
- If you have had some poor past performance, make sure you do much better and make this new performance visible to your boss
- If you are aware of a particular area of the project your boss is concerned about, discuss his thoughts on controlling those concerns and then do what he/she says and make that visible

*I Am Working On A Project
Where The Internal Day To
Day Project Management
Work Is A Full Time Job And
Then Handling The External
Interfaces With Stakeholders Is
A Full Time Job*

Full Time Internal and External Job

3) Ask Management for Help – Make your management aware of the situation using real facts and issues that have surfaced as a result of not having enough time to do both roles and offer solutions that will benefit all.

4) Manage External Stakeholder Interface Workload – If the external stakeholders are generating significant unnecessary work for the PM, the PM should “revise” that interface. Ask management for advice.

5) Do a Great Job of PM Fundamentals – Ensuring PM fundamentals are accomplished will reduce the level of internal issues needing management.



*I Do Not Have The Right
Resources For My Project*

Resources Not Right

Things that must be in place, if not, they must be done first

- Adequate requirements for the deliverable
- An adequately defined deliverable
- A plan based on the above that accurately defines needed resources

Where available resources do not match needs, do the following

- Identify specific resource shortcomings
- Identify current and future impacts to project work quality, schedule and budgets if resource shortcomings are not resolved
- Meet with management and/or resource organizations and lay out the above information in a very professional and constructive manner

Resources Not Right

In parallel to discussions with management, do the following

- Consider more efficient work methods, ask the team how things can be done better
- Consider closer team communications and work collaboration
- Focusing the team on top priority project work that are drivers of project deliverable quality, schedule and cost vs. less important tasks
- Keep a positive and constructive attitude with your team and management

*One Team Member Is Not
Performing*

Non-Performing Team Member

The root cause, or causes, must be understood

Possible root causes

- The team member is overloaded and is unable to complete the work
- The team member lacks needed skills to perform the work
- The team member is not acting in a responsible manner
- Some key issues have surfaced in the individual's work area
- There are personality conflicts on the project that are affecting this individual's productivity
- The team member may have personal or family issues or health issues that are affecting their ability to complete the work
- Other reasons and combinations of the above

Non-Performing Team Member

PM Actions

- Validate the nature of non-performance before doing anything
- If a matrix environment, do NOT contact their management right away
- Approach the person, ask how things are going, try to understand the environment and what the root cause (s) might be
- It is generally NOT a good idea to ask other team members what is not right, but keep your ears and eyes open
- If the above is not working, it is time to visit with the individual
 - Express your concerns in private with what facts you have
 - Ask for their view of the facts, ask directly if they see an issue
 - Ask if they feel something should change and what might change
 - Express your desire to help and work with them to define a solution
 - Agree on a change and follow-up later
- Last resort, talk to their management only if the above does not work

*I Am Working On A Project
Where No Completion
Conditions Are Defined*

No Project Completion Conditions

- Some would find that to be a good thing as you can deliver anything anytime, but of course this is not a good situation
- Determine if this situation exists by intent for some reason
 - It might be that the project is working toward a given goal and management is periodically reviewing results, schedule and costs expended and is making a series of on-going decisions as things progress whether to continue the project or not



No Project Completion Conditions

- Determine why this situation exists
 - Completion was never defined
 - Changes have made past defined completion conditions to be invalid
 - Completion conditions exist but are unknown by the team or are being ignored by the team
 -(other conditions)....
- Completion must be defined, consider the following
 - Review situation with sponsor / management
 - If completion conditions do exist, explore needed actions to validate condition feasibility and to inform team
 - If no valid completion conditions exist, write a “straw man” set of completion conditions for stakeholders to review; conditions must be mutually consistent with requirements, plans, contract, etc.

*Communications Are
Important But....There Are
Too Many Emails, Horrible
Meetings And “Distant”
Management Sessions,
How To Handle?*

Bad Communications

Communications are very important, but they must be a *“value add”* to the projects vs. *“a waste of time and energy”*

Emails

- Establish a Project Email Format
 - How about the title or first sentence defines *“for information only”* or *“your action required by...”* or *“.....”*
 - How about real short paragraphs and using bullets
 - Rules on Addressees – Directly involved or strong need to know
- You Might Start An Email *“Haters”* Group And Write Guidelines
 - When to Use Emails – Needed records, multiple parties involved,
 - When NOT to Use Emails – Not for info that is found elsewhere, not for topics needing high interaction

Bad Communications

Horrible Meetings

- If you are a meeting leader, do the basics
 - Purpose, outcome, agenda, meeting management, time management, ...
- If you are attending the horrible meetings, speak up and ask in a positive and constructive (i.e. not hostile) manner:
 - What is the purpose of this meeting so we can be productive?
 - What outcome from this meeting is needed?
 - What is the agenda?
 - What do you need from us?
 - Do we have enough information at this point to discuss this topic?

See webinar “Fixing Bad Meetings” at
<http://www.manageprojectsbetter.com/seminars.html>

Bad Communications

Management Meetings

- Well, you probably will just have to learn to put up with them, they are not going away and they actually are important
- If the management meetings are really bad, make some recommendations on how they can be of better value to the organization, management may not know and may well value your input
- Also be aware that management meetings often have many “agendas” some of which will not be on “the agenda”
 - Management getting the group’s reaction to some change being considered, i.e. “floating a new idea” for reaction and feedback
 - Introduction of a new team member, listening for ideas or concerns
 - Listen carefully in management meetings for the “other” agenda items

*My Team Is Not Working
Well Together,
What Can I Do?*

No Teamwork

The Root Causes Of The Situation Must Be Determined Before Solutions Are Defined

Possible Root Causes

- The team has not really “bonded” and does not see themselves as a team, this might have been caused by.....
 - The project started very informally with individual members brought onto the project over time vs. a visible “start situation”
 - The team does not have or does not understand a common goal
 - Team members do not know each other
 - Team members do not trust each other

No Teamwork

Possible Root Causes (continued)

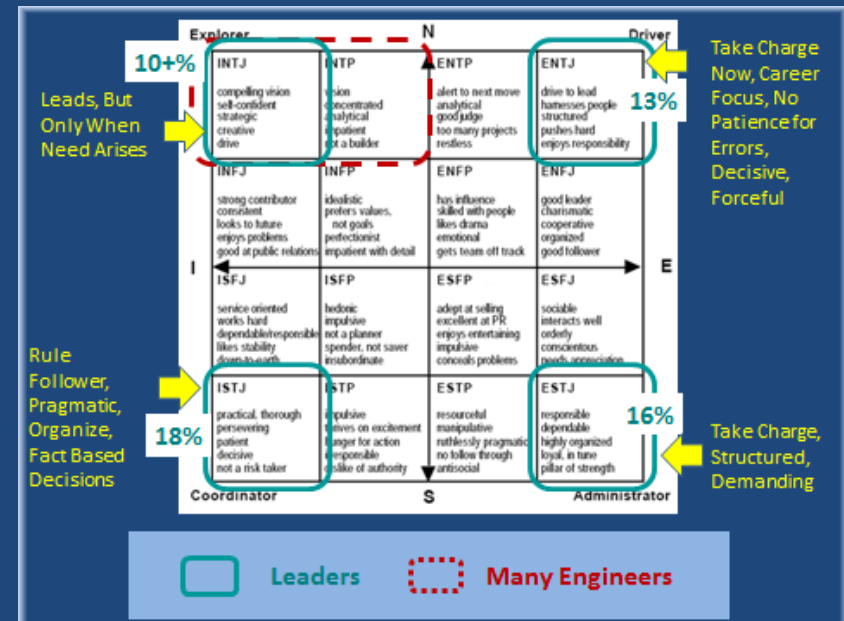
- The project does not have a plan with adequately defined roles, causing confusion
- There is some type of issue, technical or other, which has caused some turmoil
- The team is not collocated and/or periodic team communications are not functioning
- Value to individual team members being on the project is not defined or understood
- Value to the organization and customer is not defined to or understood by the team



No Teamwork

Possible Root Causes (continued)

- The team is composed of very different personalities and these differences are generating conflict (*Note that this is a whole separate topic, consider some reading on personality profiles such as “Myers-Briggs”*)
- Some team members are so focused on their own careers, they are not working to support team efforts and are not trusted by other team members



No Teamwork

Example Solutions

- Understand the root causes of low teamwork and taking actions accordingly
- More team communications
- Clear team member roles
- Clear team member responsibilities to other team members
- Work on plans as a team
- Ask team members for their ideas in meetings
- External social events
- Common problem needing all team members to work together
- Complement good behaviors
-(more exist)....

*My Organization Does Not
Define The Role Or
Decision Authority For PMs
Making It Hard For Me To
Get Team Members To
Follow My Direction*

Undefined PM Role and Authority

This is a common issue and really needs resolution

Two things can be done

- 1) Work in your organization to support a PM role definition
- 2) Work as a PM to establish your role and authority on each project

#1 – Work in Your Organization to Support a Definition

- Good topic for a PMO if one exists
- Good topic for any group of PMs that meets informally to define improvements in managing projects
- Good topic to escalate to management
- Must be defined at high level but be complete, details can cause issues
- Look for role definition examples

Undefined PM Role and Authority

#2 – Work as a PM in Establishing Your Role and Authority

- When a project starts and team members are assigned, talk to each one individually and thank them for supporting the project
 - Explain why the project is important and why their role will be important
 - Tell them that you want to help them be successful
 - Tell them that you want to hear of any issues
- As the project progresses
 - Make sure you touch base with team members periodically
 - Conduct team meetings to support your authority
 - Don't micromanage, but also do not wait until a concern is a problem
 - Exhibit professional and constructive attitude and behaviors at all times

All in all, if you act like a leader and put the project and the team ahead of your own interests, you will, over time, garner the team's respect and they will see you as the PM and follow your direction

Summary

What to Do

Solutions Exist in Proactive and Reactive Forms

PM Can Control Root Cause

Many Difficult Project Situations Can Be Due to Lacking PM Skills or Inaction

Every PM will need many skills and apply those skills to be successful, examples are ...

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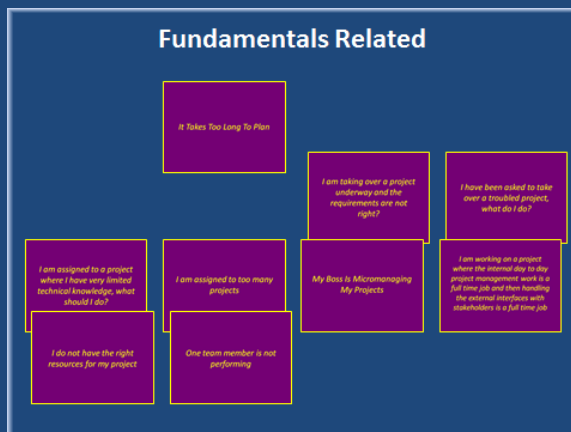
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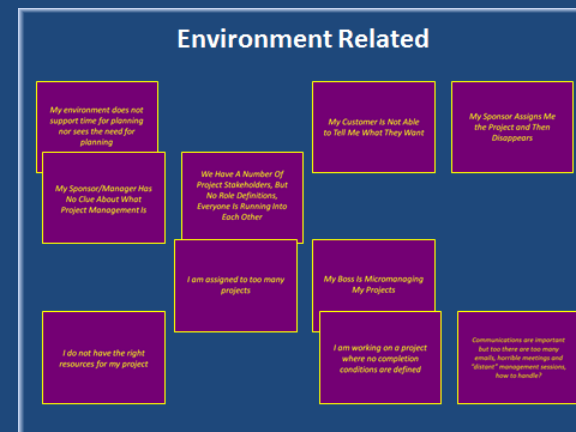
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PM Must Be Reactive



Many Solutions are PM Basics

PM Can Control Root Cause

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"Some Laws of Project Management"

- 1) A project must be "Performed" and "Managed" to be successful.
- 2) To "Perform the Project," you need "Resources."
- 3) To define needed "Resources," you need a "Plan" and to "Manage the Project," you need a "Plan."
- 4) To develop the "Plan", you need to know what "Work" is needed and what "Constraints" exist for the project, such as budget and schedule constraints.
- 5) To know what "Work" is needed, you must know the specifics of what the project will deliver, you need a "Deliverable Definition."
- 6) To develop the "Deliverable Definition" you need "Deliverable Requirements" that define what the project's customer wants and what the "Deliverable" should be or do.
- 7) To have defined "Project Constraints" and defined "Deliverable Requirements," the project's customer, with help as needed from the project team ...
 - o Needs to define "deliverable requirements" completely, accurately and in sufficient detail
 - o Needs to define all real "constraints" and all constraints need to be feasible and appropriate
 - o Needs to ensure that the "deliverable requirements" are compatible with the "constraints"
 - o Needs to be able to clearly communicate "deliverable requirements" and "constraints"
 - o Needs to eventually stop changing "deliverable requirements" and "constraints"

Rules for Project Managers

1. *Do the right thing*
2. *Manage your project, it is your job*
3. *Treat your team well, help your team grow*
4. *When you don't know, ask and help others understand*
5. *Tell the truth, acknowledge your mistakes*
6. *Put the customer and your team ahead of yourself*
7. *Do the right thing*

“Some Laws of Project Management”

- 1) A project must be “Performed” and “Managed” to be successful.
- 2) To “Perform the Project,” you need “Resources.”
- 3) To define needed “Resources,” you need a “Plan” and to “Manage the Project,” you need a “Plan.”

“Some Laws of Project Management”

- 4) To develop the “Plan”, you need to know what “Work” is needed and what “Constraints” exist for the project, such as budget and schedule constraints.
- 5) To know what “Work” is needed, you must know the specifics of what the project will deliver, you need a “Deliverable Definition.”
- 6) To develop the “Deliverable Definition” you need “Deliverable Requirements” that define what the project’s customer wants and what the “Deliverable” should be or do.

“Some Laws of Project Management”

7) To have defined “Project Constraints” and defined “Deliverable Requirements,” the project’s customer, with help as needed from the project team

- Needs to define “deliverable requirements” completely, accurately and in sufficient detail
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Rules for Project Managers

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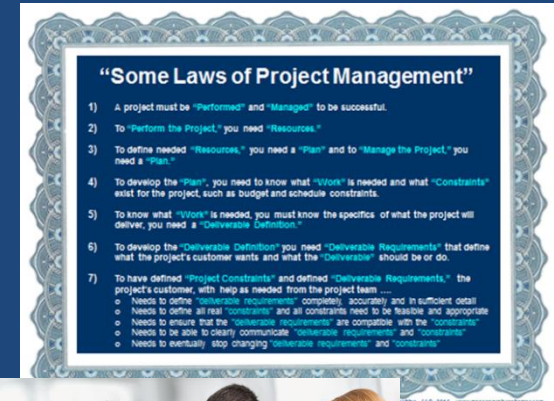
Handling Difficult Project Situations

Bottom Line, What to Do

Learn and apply all project management fundamentals, i.e. follow the laws of projects, educate others

Be a leader and build a good working relationship with your team

Build a good working relationship with your sponsors, customers and management



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Bottom Line, What to Do

Build communication skills and learn when to communicate certain things to certain stakeholders at certain times.....and then do it

Learn the basics of teamwork and collaboration and apply to your team

Adopt the mindset that “doing the right thing” is “doing the right thing”



Rules for Project Managers

- 1. Do the right thing*
- 2. Manage your project, it is your job*
- 3. Treat your team well, help your team grow*
- 4. When you don't know, ask and help others understand*
- 5. Tell the truth, acknowledge your mistakes*
- 6. Put the customer and your team ahead of yourself*
- 7. Do the right thing*

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A Critical Skill for Every PM

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