



## Project Management Best Practices

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A best practice is a technique, method, or process that is believed to be more efficient and effective in achieving a goal than any other techniques, methods and processes, when applied to a particular condition or circumstance. Best practice is based on experience and is used to describe the process of developing and following a standard way of doing things.

In project management, best practice is a general term that includes:

- Guidelines
- International standards

Both standards and guidelines look to improve project management. In practice, most project managers think that the two concepts are one and the same. Guidelines in project management are methods that can contribute to goal achievement when dealing with projects, whereas standards are expected to be objective, definitive and robust. Guidelines issued by professional bodies are open to interpretation, but, standards issued by specialized organizations are usually based on best practices and guidelines given by professional bodies. However, sometimes guidelines can become standards.

Before looking into some of the widely accepted best practices, let's look into project management myths which everyone should be aware of and have a clear understanding so that these wouldn't become roadblocks to successful project management.

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### Myths

#### The Project Portfolio must be fixed.

Reluctance to shift gears at an organization-wide level is perfectly understandable; it can mean increased costs and schedule delays across the portfolio. But given today's increasingly complex project environments, organizations must try to build some flexibility into their plans.

"Projects are fluid. No matter how much you think of and how much you anticipate, there's always something else that comes along, you have to adapt the plan to allow for that."

#### Process outplays people.

From work breakdown structures to change control, project management is full of processes. But no organization should forget that it's people who actually execute projects. "Because the project management process is about accomplishing goals through coordinating the activities of people, the people are generally more important to project management success than the process," says James Bosak, director, program management at IT giant CA Technologies, Raleigh-Durham, North Carolina, USA.

#### Higher management need details.

No, Higher management doesn't need complete understanding of the day to day task and progress details of every single project across the portfolio. They have a lot to deal with and going into details is impossible and not necessary also.

They need to have trust in the project managers and shouldn't hesitate to get input from them. Project managers should be able to give their management a big picture overview of the status with which they should be able to have a solid overview of the projects and relate them to the strategic goals.



### Execution is everything.

We all think that executing a project is the interesting and important part of a project. But it's not. Successful Project Management clearly needs the best planning possible which can make all other phases run smoothly. A detailed, well thought of project plan answers some key questions about the upcoming effort, including how, when, by whom and for how much. Only through effective project planning can organizations consistently deliver expected benefits and value.

### A well-managed portfolio means no project backlog.

A portfolio with no project backlog looks perfect but it's not the right way. A slight backlog actually indicates that the organization is moving at the right pace. If not, it means that the organization is pushing its resources too hard to take up all the projects in the pipeline and clear the backlog which will actually impact negatively in the long run and might not yield the expected results after the project completion.

### Risk management ends when the project begins.

Risk management is one of the important parts of a Project Management that it doesn't end at the launch of the project. It should be practiced across the entire project life cycle. Organizations should first identify risks, then they should conduct an analysis of their tolerance for those risks, as well as a response strategy. But organizations also need to establish an ongoing process for monitoring and responding to risks that weren't identified in the preliminary project planning.

## Best Practices

Now let's get to the interesting part. There are many advantages of using best practices. They not only advise you on how to be a successful project manager but also help you avoid any unforeseen issue which usually is not thought of.

### Plan the work by creating Project Charter document.

As already mentioned in one of the myths, planning is the most important part of a project. The tendency to shortchange the planning process and jump right into the execution should be controlled and more emphasis needs to be put in planning the work thoroughly. The importance of this practice can't be stressed enough. The project charter is the primary deliverable from the planning process and describes all aspects of the project at a high level. Once approved by the relevant stakeholders, it becomes the basis for the work to be performed.

### Create a planning horizon.

A detailed project plan will have everything about how the project will be completed. So more time and emphasis should be placed on creating





the project plan with as much details as possible. High-level activities that were initially vague need to be defined in more detail as their time frame gets closer.

### Have a Project Kick-Off meeting.

Having a kick-off meeting is as important as carefully planning a project and documenting it. This meeting provides a stage to set the ground rules for the project and also get the views and opinions from the team and other stakeholders if they are in agreement with the process and procedures.

This will also help in

- Communicating the business driver of the project to the team
- Establishing goals
- Explaining the project delivery methodology
- To build common vision with all the stakeholders.

### Keep a watch on warning signs.

The Project Manager should always keep a watch on warning signs which may push the project off course. These signs keep showing up in various forms and an effective project manager should be able to catch them in time and avoid them.

These warning signs include

- Small variances in schedule or budget
- Change in team morale
- Change in quality
- Frequent unexpected issues

These may seem small day to day operational issues but there might be a bigger problem lying behind them, which, if not caught and solved, might impact the entire project.

### Ensure that the sponsor approves scope-change requests.

This may sound very obvious but sometimes it gets missed which leads to bigger problems. However small the change request be, if its impacting the project constraints, it needs to go through a change request with formal approval from sponsor who is the only one who can add additional funding to cover the changes and know if the project impact is acceptable.

### Safeguard against scope creep.

Scope creep is a series of small changes in scope which are made to the project without using change management procedures. Individually these changes may not impact the project constraints but they can accumulate and have a significant impact on the overall project. Project managers should be diligent enough to lookout for the scope creep and make sure that any kind of changes go through a formal process which will help in identifying the necessary and unnecessary changes.

### Identify risks during planning.

It is very crucial to identify risks and mitigations during the planning phase to minimize their impact on the project. And effective project manager may not be able to identify all the risks associated but should be able to identify most of the risks in the beginning of the project itself to be able to create a mitigation plan and make sure that they don't become issues during the life of the project.



PMs can use information from similar projects if exists to be able to identify all the possible risks irrespective of the feeling of their occurrence in that specific project. PMs should also leverage multiple tools or build own tools like custom surveys and brainstorming to be able to identify potential risks.

#### Lookout for potential risks throughout the project.

Project manager's role in risk management doesn't end after planning phase. Risks are the biggest threats for a project and they can creep in at any stage of the project. So a PM should perform updated risk assessment in regular intervals to see that no new risks have surfaced which needs to be planned and mitigated properly.

#### Understand the difference between a risk and an issue.

It's very common for project managers to mistake an issue for risk and vice versa. In both cases it will become a bigger problem as the plan is different for managing and risk compared to managing an issue. A risk as an event that has not happened yet and an issue is something that already has happened. An issue needs to be checked almost every day or week as it has already happened but a risk need to be checked only periodically. PMs should be able to differentiate between these two and take necessary action to solve or mitigate them accordingly.

#### Have a Project Post-Mortem meeting.

One of the most commonly ignored phases in project management is closing. Closing the project effectively not only improves the project quality but also helps other future projects to refer to this project for useful data like lessons learned.

Project post mortem meeting with all stakeholders helps in identifying all the good and bad happened in the project and will help PM to document the lessons learned effectively. All the lessons learned should be placed in a central repository and made available for all PMs. Post-mortem should be scheduled right after the project is completed while the details are still fresh in memory and should be conducted in a constructive manner to identify the possible improvements if a similar project is undertaken in future.