The Zombies of Project Management

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Abstract

After nearly 25 years as a Project, Programme & Portfolio Management, I have noticed certain views have become very entrenched in our industry despite volumes of evidence to the contrary. These views remain immune to many attempts to disinfect them through white papers, case studies, education, conferences and the sharing of first-hand experiences to the contrary. The perpetrators of these myths or ‘zombies’ of project management claim their views are pragmatic and based on ‘reality’. My view is that their reality is often a very narrow and subjective view.

This paper tackles the four most commonly expressed ‘zombies’ of project management:

- It’s not worth measuring and tracking benefits in projects and programmes
- It’s not important or critical to keep a schedule in a project
- It’s not important to have a project management methodology when you are using the Agile approach
- It’s not a necessity but rather a luxury that in many cases Organisational Change Management isn’t delivered with a project or programme

This paper will outline a strong case to refute each of the above ‘zombies’ highlighting the reasons why these myths are wrong and the dis-benefits these zombies deliver. It will draw heavily on my experience and the first-hand experience of others to explain the great benefits that accrue to project managers who choose to slay these myths and adopt the right practices.

Keywords: zombies, benefit management, change management, schedules, methodology

Introduction

Benefits Management

My observation is that there is a growing consensus around the requirement for Benefits Management in projects and programmes these days. In most organisations these days, there is a requirement for a business case or at the very least a cost/benefit analysis. These documents require benefits to be both identified and quantified. My observation is there is a low level of capability in the project community around the accurate development of these documents. In fact, I’ve heard practitioners play down the importance and referring to ‘tick boxing’ when discussing the documents’ importance. In many cases, the documents are rushed and the authors will go through the motions and produce documents used to force through the approval of the project rather than to take a subjective view of any possible merits of selecting the right option: the proposed project, an alternative project or no project at all. I’ve also observed a wide and varied range of views on how benefits can be identified and quantified with varying degrees of quality. I’ve seen very scientific approaches befuddle most users and seen light touch approaches that have delivered almost no value. It’s no wonder there is a ‘zombie’ walking around believing that benefits can’t be measured and not worth the effort.
I believe Benefits Management has a number of key principles:

- There must be careful diligence applied to the identification and quantification of benefits from a broad set of categories (Financial, Non-Direct Financial, Enabling & Soft Benefits)
- There must be focus on any potential dis-benefits
- The information held in documentation needs to be dynamically updated throughout the lifecycle of the project ensuring that the ‘case’ for the project is maintained and used as a sound basis for decision making.
- The process must be easy to understand and use

Understanding the key phases of Benefits Management (Identification, Quantification, Tracking and Realisation) will help the Project Manager, Project Sponsor and the organisation prioritise and keep prioritising this project against all other competing investments.

**Schedule Management**

It’s my strong belief that schedules are an integral part of a project plan. It’s important to recognise that a schedule is not the plan but a part of a project plan. A good schedule will outline the detail of what needs to be done, when it needs to be done and by whom. The more mature schedules will also track costs, actual progress against the schedule and provide earned value information that is crucial for project managers and key stakeholders to establish the likelihood of success for a particular task and/or the project.

My observation on schedules is they are rarely put together well and are rarely maintained after their initial creation. They are usually created to help paint a picture on resourcing, cost and timing for proposed projects but once approved are rarely updated or accessed again. Some schedules are so detailed because they’ve been created to support the detailed estimating required for a project’s approval that they are unwieldy for use as implementation schedules. Some schedules are used as ‘check-lists’ rather than a sequence of discrete tasks with task dependencies. These ‘check-list’ schedules become too onerous to update and end up being abandoned very soon after approval.

This observed low maturity around project scheduling has created an environment where inappropriately complex and long project schedules have put many people off the crucial task of updating and maintaining a schedule. This has helped fuel the zombie that schedules are wasted effort as the changes are too frequent to warrant keeping an accurate and up to date schedule.

In my opinion, effective project schedules have the following key principles:

- The schedule should be created using an organisation template that speeds up the development of a schedule based on commonly agreed standards and layouts
- The schedule contains discrete tasks but doesn’t have a checklist of all activities in it
- The schedule must contain accurate resource and cost estimates
- The schedule should be published to a common repository giving the enterprise a view of overall resource allocation, any dependencies and
- The schedule should be baselined with actual progress updated into it so we can work out the earned value of any task and/or the project

Providing up to date information to all project stakeholders helps support effective and timely decision making for not only the project but for the entire portfolio.

**Agile Methodology**

It’s my belief that the Agile methodology is often being misused and abused in a way counter to its driving principles. I’ve observed the removal and abandonment of all pre-existing methodologies once an organisation decides to adopt the Agile approach to delivery. This shows a deep misunderstanding of the right environment required for Agile to thrive. Agile is a delivery methodology and not a Project Management methodology. Therefore to impose it as a Project Management methodology across an entire organisation can have a very unsettling effect on those trying to run projects that have clearly defined and understood requirements and approaches in place.
My observation and experience have shown that an organisation needs to separate out its project management methodology from the delivery methodology. This approach means an organisation can adopt a standard basic waterfall type project management methodology as a standard but combine it with the right delivery methodology whether it is Agile, an SDLC, a waterfall or other. This approach will ensure that the executives can see all projects in a dashboard and confidently compare the various projects. This approach will ensure the various types of projects in an organisation are accommodated for in terms of the approach to delivery.

**Change Management**

It’s my observation that many projects are successes as deliverables or products but fail to achieve the outcomes and benefits much hoped for when first proposed. My research has shown that there is a proportional link with the amount of Organisational Change Management delivered with the return on investment hoped for at the outset of the project. When organisations adopt change management they are helping insure the return on the investment. This is done by ensuring the change management activities are focussed on activities designed to win the ‘hearts and minds’ of all stakeholders, whether team members, sponsors or users.

Typically, Change Management is delivered in three key phases:

- **Unfreeze or Preparing for Change.** This phase delivers activities and planning focussed on
  - Envisioning the future state i.e. what will the future after this project has been delivered look like?
  - Developing the appetite for change i.e. what is in it for all the key stakeholders?
  - Insuring the Benefits i.e. what are the desired benefits and how to do we remove all impediments to their realisation?

- **Move or Delivering the Change.** This phase delivers the training, change or the knowledge required to achieve the change

- **Refreeze or Reinforcing the Change.** This phase delivers activities and planning focussed on:
  - Reinforcing the New State i.e. what incentives are there for the users to continue to use or think or behave in this new way?
  - Protecting the New State i.e. what has been done to ensure ‘no going back’ to old ways of doing things or behaving?

These change management activities will use up financial and human resources and will cost money. Therefore, to have no allowance for these activities in a project or programme budget will almost certainly starve the project of the effort required to ensure success at the outcome/benefit level. As most projects have a business case or a cost/benefit analysis these days which outlines the hoped for return on investment, it’s difficult to understand why an organisation or a project manager would decide it’s a luxury that couldn’t be afforded. Saving money by not delivering change management would almost certainly degrade if not eliminate the stated benefits.

In my opinion, it would be hard to conceive how any change through projects and programmes could be effectively delivered without focus on Change Management.

**Meet the Zombies**

The zombies will be introduced in the form of a photo and key information (profile page). Their outrageous beliefs will be described.

I’d like to introduce Boris, Horace, Morris and Doris who each represents a ‘zombie’ of Project Management a strong widely held belief that represents an incorrect view that can’t be killed off despite repeated attempts by the PMI and the project communities:

- Boris believes that you can’t measure benefits for many projects and that it’s a waste of time.
- Horace believes that you can have a project without a schedule and that it is wasted effort as the schedule will keep changing anyway.
- Morris believes that Agile is a project management methodology in itself and doesn’t require any further controls or process around it.
Doris believes that Business or Organisational Change Management is a luxury that most projects can’t afford. Delivering the project is paramount and the rest is just fluff.

Come along and meet them and get a look at their very ugly faces and let’s see if we can, together, kill off these zombies once and for all.

**Previous Attempts to kill off the Zombies**

The previous attempts to kill these Zombies will be discussed:

- PMI Conferences
- Numerous books
- Best practice and right practice guidance

And still, these zombies are everywhere to be found. The zombies appear in conferences, they take over PMOs, they appear in leadership positions, they blog and appear all over the internet and on social media.

**Meet Boris**

Boris believes that benefits can’t be measured accurately. He says that benefits are not all about dollars and for that reason it’s too hard and not worth the effort. He thinks that benefits are used to help justify projects but are then ignored upon the project’s approval and therefore is nothing to be gained by going to the effort of identifying and quantifying these benefits. Just deliver the project and get on with it. If it’s a good idea and people want the project, then that’s all you need.

**Why and How Boris must die!**

We need to tackle Boris head on. Without Benefits Management & Realisation, we deny ourselves and our organisations an opportunity to work out the ‘right’ projects and programmes to invest precious resource in. To tackle Boris we need to discuss the following:

- It’s easy to do Benefits Management by keeping it simple:
  - Four categories of Benefits:
    - Direct Financial – financial benefits that bring benefits directly to the bottom line like increased revenue/profits and reduced costs
    - Non-Direct Financial – financial benefits that help guard the bottom line but require spending on initiatives like safety and compliance
    - Enabling – benefits derived by doing more with less like efficiency gains from investing in new systems and training
    - Soft – benefits that are the hardest to quantify but not impossible to like staff morale, brand awareness and organisational reputation
  - Understand techniques around how benefits can be measured using financial and non-financial indicators
  - How easy it is to quantify, track and realise these benefits

**Meet Horace**

Horace believes that you can control a project without a schedule. He says that way too much emphasis has been placed on having an accurate and up to date schedule of activity on a project and this ties project managers down to their desks. He believes that a good project manager should instinctively understand how their project is going and should be able to focus on a few key dates and deliver to those dates without too much trouble. Horace also believes that as projects are living beasts which constantly change then expending effort onto a schedule that constantly changes is just a waste of time and a distraction that a project manager doesn’t need.
Why and How Horace must die!

We need to sort Horace out. Schedules get bad press because of those who have taken scheduling to an extreme sport have put many people off this fundamental aspect of project control. Some have created schedules with literally hundreds and in some cases thousands of lines and have lost the perspective on what a schedule is. An effective schedule is NOT a checklist of activities but instead a schedule of key work activities that acts as a communication device for the project team and other key stakeholders. Right practice scheduling states that no tasks of less than a day’s duration and no tasks of more than 2 week’s duration should be entered into a schedule. To get rid of Horace we need to discuss:

- Using an Inbound and Outbound dashboard at the top of each schedule assists in getting Dependency Management right
- Schedules should reflect the key deliverables or products that a project is delivering for ease of reporting
- Right practice tips take the oppressive aspects of scheduling out of the equation
- Using right practice schedules as powerful communication and engagement tools
- Using schedules to understand resource demand and resource utilisation
- Using schedules to support benefits management

Meet Morris

Morris believes that Agile is a project management process in itself and doesn’t want to see it anywhere near PRINCE2 or PMBOK methodologies and objects to any attempt to use the term ‘waterfall’ near it. He believes {in a maniacal way} that any attempt to use a schedule or any planning controls harms Agile and there is just no need for ‘that stuff’.

Why and How Morris must die!

Morris needs to get a grip. Agile is a great development approach for when it’s impossible or impractical to get the requirements completely nailed down before delivering. Agile is a great approach when we have experienced practitioners who know ‘HOW’ they are going to deliver a solution but are still attempting to get a clear picture of ‘WHAT’ needs to be developed. However, Agile is not the best development approach for ALL project types. When the ‘HOW’ is understood and the ‘WHAT’ has been defined and documented, then Agile is not the best development approach. Morris doesn’t understand the information and visibility requirements that senior management require from projects. He also doesn’t understand the challenge facing the PMO who have a responsibility to provide a dashboard on all projects in an organisation. If he did, he’d appreciate that viewed from ‘above’ in an organisation, all projects require a layer of a standard project management approach that assists them in making ‘apples apples’ comparisons when prioritising, selecting, pausing or cancelling projects. This approach doesn’t stop projects from using optimal development methodologies like New Product Development, Agile, V model and Waterfall in developing products or deliverables.

Morris is wreaking havoc in organisations where he zealously preaches the removal of all project controls and methodologies. Most people don’t need a second invitation to throw these out. He leaves a trail of temporarily exhilarated project communities who then very quickly sink into depths of despair as they try and make sense at a dashboard and reporting level of the various initiatives within the organisation. Morris has no regard on the impact that this has on Portfolio Management.

Meet Doris

Doris believes that Business or Organisational Change Management is a luxury that most projects can’t afford. Delivering the project is paramount and the rest is just fluff. Doris has no time for those that believe we need to understand and accommodate people’s hearts and minds when changing systems or processes. Doris says ‘people should get over themselves and get with the game’. She continues by saying ‘if an organisation makes a change, then people should accept it and adopt it immediately. Why should an organisation invest in all of this touchy feely stuff? Projects use up enough resources as it is without extra cash and time and trouble being thrown at people who can’t handle change. Crazy!’.
**Why and How Doris must die!**

Doris is seriously deluded. It’s one thing to deliver a project deliverable or output but unless the users or audience or receivers of the project are ready and primed to adopt the change, you end up with a ‘WHITE ELEPHANT’ pure and simple. If we fail to gain adoption or commitment to use the new system or new product, then we run a very serious risk of failing to realise and deliver the benefits as promised in the business case. This outcome is disastrous in terms of achieving the return on the organisation’s investment. We need to tackle this outrageous viewpoint by covering of a number of facets of change management:

- Change Management is all about envisioning what the future state will be and engaging people into that vision.
- Change Management takes the people elements of projects and programmes and places them at the centre of the change process. This approach often enhances the project’s deliverables and outputs.
- Change Management increases the likelihood of benefits being realised which means it’s not an overhead but instead a benefits enabler.
- Change Management goes a long way towards bring unity to the project team and the key stakeholders which helps remove potential blocks in the path of project delivery.

**Our PM civilisation is under threat**

We have a lot to lose if we fail and a lot to gain if we succeed. We need to be vigilant. We need to display the right behaviours and kill these zombies at every opportunity. Look out for them. Be prepared. The best way to kill these zombies is to practise these behaviours and show our local communities how easy and beneficial they are. Use every opportunity to promote these practices and ward these zombies off. Don’t hire them. Make sure you fire them. Tell everyone about them and where they are. Name them. Shame them.

**References**

No references. The content is based on the presenter’s experiences as a practitioner, an internal and external consultant.

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