

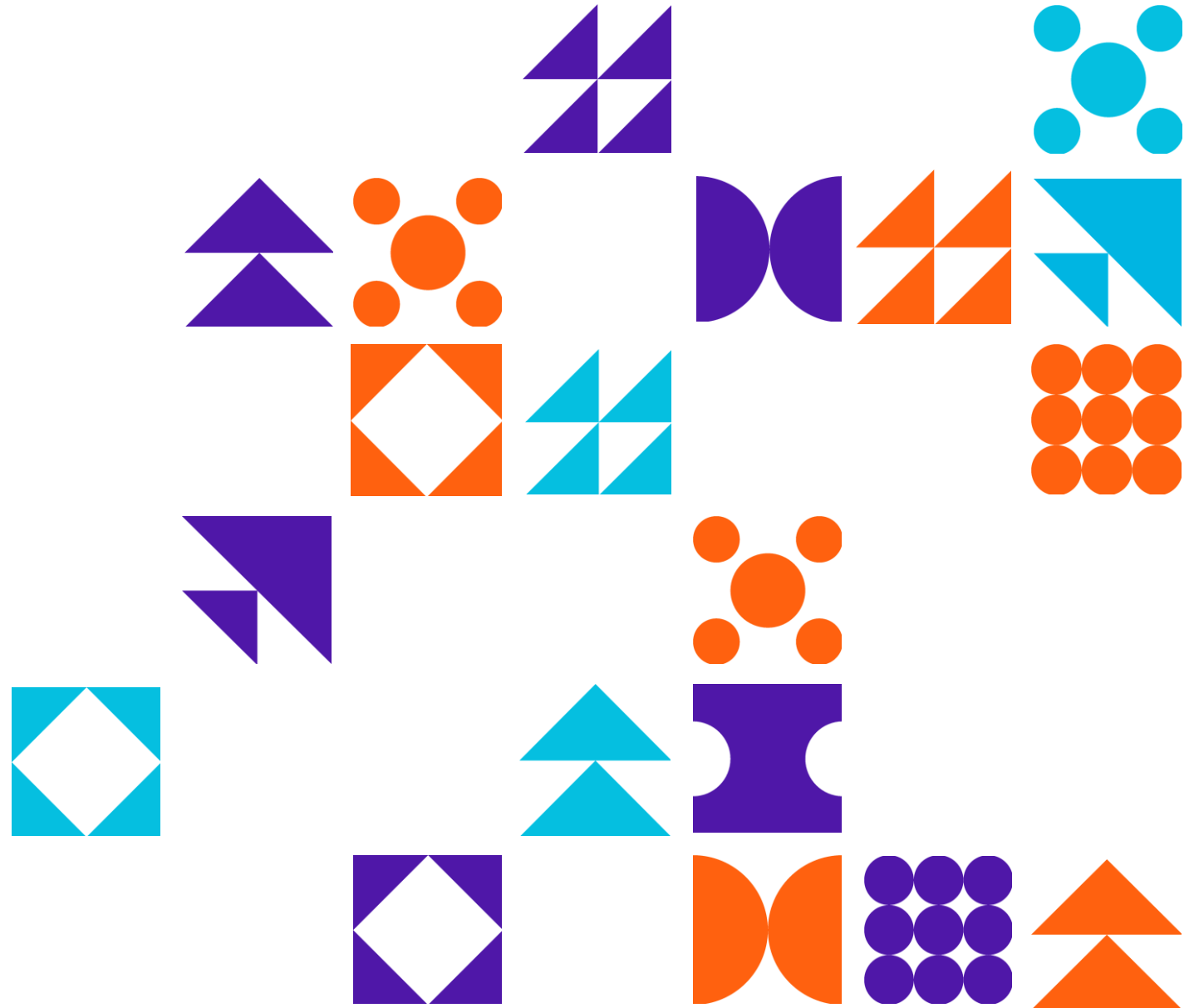
Accidental PMs In Our Organizations

How We Can Develop Project Management
Competence Outside of PMOs

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Who Am I and Why You Can Trust Me

Jay Cohen

- 25 years managing projects, programs, PMOs, and people
- Established new PMOs in Insurance, Healthcare, Entertainment, Utilities, and Government
- Program Manager for ACA Implementation, Grid Modernization, Election Management Software Implementation
- Founder of Real PM
- Big Project Management Nerd

What Is Real PM?

Real PM is an approach to project management dedicated to **getting the work done as efficiently, completely, and painlessly as possible.**

Real PM's Guiding Principles

- Make Things Better
- Everyone involved in project work is a human, and
- Humans must understand what to expect and
- What is expected from them and
- To be treated with respect and decency

The 1-Slide Presentation

- There are people managing projects in your organization who are not PMs.
- Everyone benefits when trained PMs offer help and training to them.
- Our complex methodology can be broken down into a simplified framework and toolset that will:
 - Facilitate project success
 - Improve the reputation of the PMO and its Project Managers
 - Teach a new skillset to a valued member of the organization



What Is An Accidental PM?

Someone tasked with leading a project who:

- Is not a PM by title or trade
- Is not supported in their project by a PMO
- Is expected to deliver a quality result without a delivery framework



Do Accidental PMs Exist In Organizations That Have PMOs?



Absolutely!

Accidental PMs can be created when

- PMOs are understaffed
- Staff PMs don't have the "required" SME expertise
- Sponsor does not want to deal with PMO "red tape"
 - i.e. Pet Projects

What Do We Do About Accidental PMs and Their Projects?

We have a number of choices:

- Pretend they don't exist
- Start a turf war
 - “Projects belong in the PMO!”
 - “Projects must be managed by *trained professionals!*”
- Support them and make them better



We Can't Pretend They Don't Exist

- Makes us look dumb
- Makes us look apathetic
 - Not lazy! That's a whole different talk
- It's just not the right thing to do



Should We Start a Turf War?



We would need to consider:

- What is the mandate for the PMO?
- How well are we staffed?
- What is our standing in the organization?
- Can we win a turf war and at what cost?
- *Will a turf war make things better?*

We Should Support Them and Make Things Better

- Prove Our Expertise
- Improve PMO's Standing in the Organization
- Give the Organization a Win
- Make a Positive Difference to a Person
- *Make Things Better*



What Kind of Support Do Accidental PMs **NOT** Need?



Deputizing Them Old West Style

“You are hereby declared a Temporary PM. Good luck!”

Why This Won't Work

We are trained professionals with complex methodologies that are not suitable for beginners

What Kind of Support Do Accidental PMs **NOT** Need?

Vague Assurances of Support

“Whatever you need, you just ask!”

Why This Won't Work

They don't know what they need, and very few people are brave enough to come forward without a specific question



Real PM Approach To Supporting Accidental PMs



1. Make First Contact
1. Simplified Framework
1. Ongoing Support

First Contact

Reach out with empathy

Make it easy and convenient for the
Accidental PM

Reach out with a plan



Simplified Framework



What is success?

Satisfy the business need on time with available resources

Also:

Do it in a way that doesn't leave a trail of destruction

Bonus:

Do it while building skills and processes to make it easier to do next time

What Is The Plan?

1. Context
2. Draw A Box
3. Build A Team
4. Chunk Out the Work
5. Plan the Work
6. Communicate



Context



What is the business need?

We don't take on work for no reason.

Context – Business Need

What hurts?

What's the opportunity?

What's at risk?

Context Is Critical

When we understand why we're doing the project, we're able to make better decisions when things go sideways



Alignment, Asking Questions, Keeping Receipts

Do we need this content?

Do We Need This?

Drawing A Box

Get to know the size and the shape of the work. Get a feel for the edges.



What To Put In Our Box



4 Things Go In Our Box:

1. The Business Problem
2. The Business Outcome
3. The Deliverables
4. The Timeline

Beginning With The End In Mind

Our box tells us:

1. Why we're doing this
1. What it will look like when we're done
1. What we have to deliver to get there
1. Whether we are tied to dates



Our Box Becomes Our Charter

Our Accidental PM now has a charter!

A charter is not just some boilerplate to fill out so that we can pass a stage gate.

A charter defines the Why, the What, the Who, and the When.

It will serve the Accidental PM as a North Star.

Sponsor's signature authorizes the Accidental PM to act.



Build Our Team

Before moving forward with planning, the Accidental PM needs to define their team.

Building a Stakeholder Register now will help the Accidental PM to:

- Find their experts
- Sniff test the deliverables, budget, etc.
- Plan communications
- Find Gaps



Get Commitments From the Team

Present the Charter and Stakeholder Register to team members as part of recruiting.

This accomplishes:

- Setting expectations
- Gap Finding
- Developing Context

This facilitates:

- Getting commitment from stakeholders and/or their managers to support the project

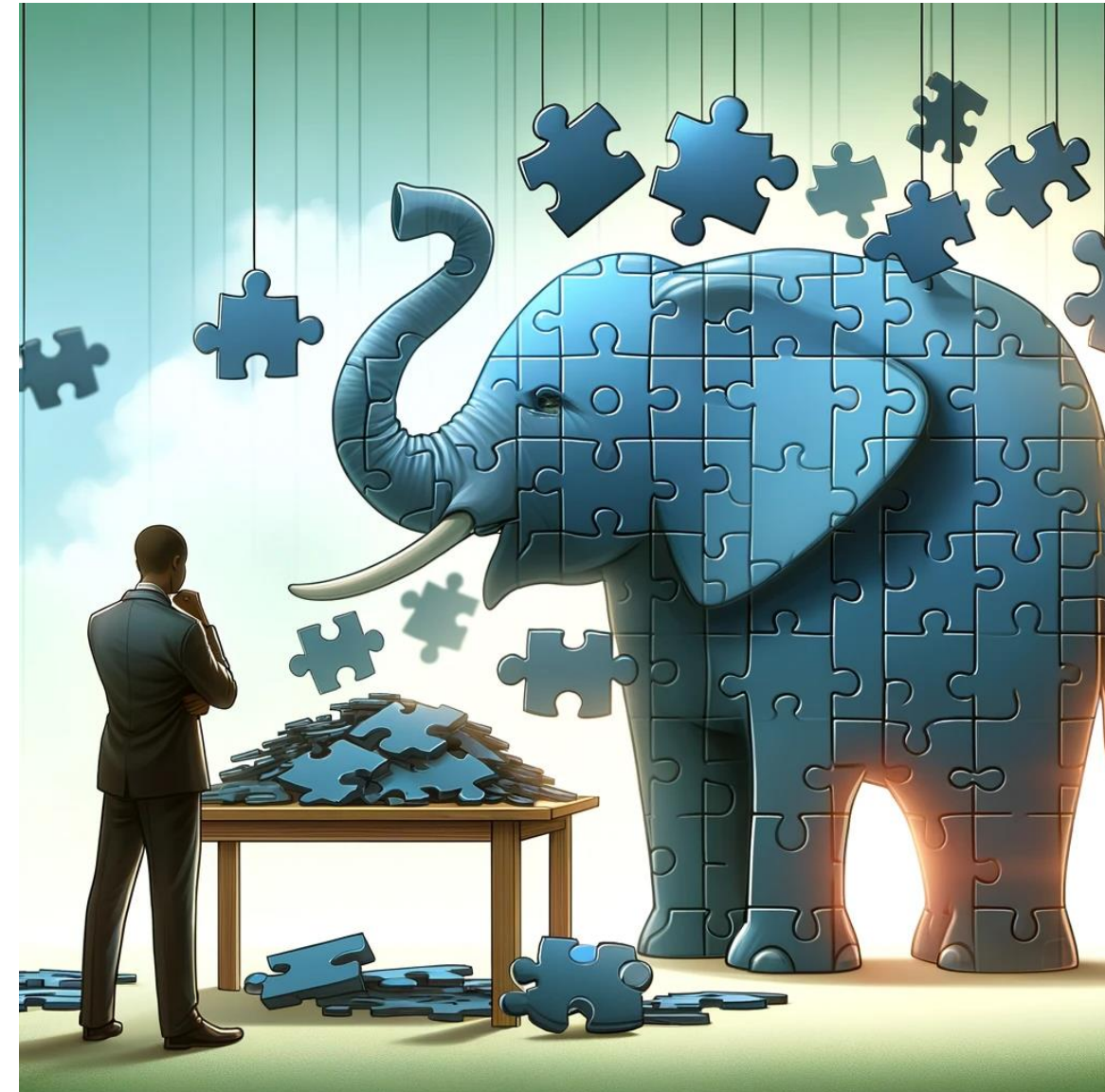


Chunk Out The Work

Our charter defined what must be delivered.

How do we deliver?

How do we eat the elephant?



Enter the WBS!

Trace the **work** necessary to complete the deliverables by **breaking it down** into the smallest feasible chunks.

There is tremendous value in the **doing**, and the best service we can provide the Accidental PM is to facilitate or coach them in facilitating WBS sessions.

Wonderful Things About WBS

1. The 100% Rule

All of the work required for the project is in the WBS.

If it's in scope it's in the WBS.

If it's not related to a deliverable, it's not in the project.

2. Creating a WBS leads to understanding the project better

Forces consideration of the sequencing of activities

Helps find holes in approach and approach

3. Once it's done, it becomes a communication tool

Plan the Work



At its most simple, a schedule is just a copy of the WBS in list form, along with dates.

The schedule becomes a communication tool, too.

The WBS describes the What and the logic behind it.

The schedule describes the When.

Communicate

Everyone on the Stakeholder Register needs to be informed of the 3 P's:

- Progress
- Problems (Issues)
- Potential Problems (Risks)

Where Do We Go From Here?

Lunch and Learns for other Accidental PMs

Gradual expansion of the PMOs area of responsibility

Evolution of the organization's approach to project management

Formal Project Management training

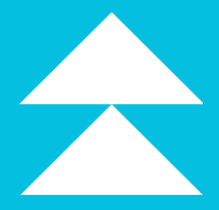
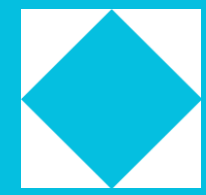
Wrapping Up

- Accidental PMs are real, are likely in your organization, and will appreciate the help.
- Everyone benefits when trained PMs offer help and training Accidental PMs.
- Our complex methodology can be broken down into a simplified framework and toolset
- Find templates for Charter, Stakeholder Register, Schedule and more at realpm.net/templates



THANK YOU

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