

# 9 keys to successful project management

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The Project Management team in IBM Technology Lifecycle Services has many years of project management experience covering a multitude of projects for IBM zSystems® and Power® environments, from hardware server migrations to new software installation and/or migrations. Reflecting on both successful and not-so-successful client engagements, the team has identified several key ideas as essential for success. We believe project management success boils down to how well the following steps are executed:

1. Start with a strong kickoff
2. Identify team players
3. Know your objectives
4. Be a servant leader
5. Define an escalation process
6. Track everything
7. Report appropriately
8. Hold regularly scheduled meetings
9. Take documentation seriously

### **Key 1: Start with a strong kickoff**

It's amazing how little attention is usually placed on the kickoff meeting. In our experience, the kickoff is one of the most important aspects of starting a successful project, and it needs to be carefully planned. Otherwise, the project manager (PM) and the client are wasting their time. An ill-conceived kickoff meeting can start the PM on the wrong foot with the client, and the client may perceive that the PM doesn't know what he or she is doing.

When planning the kickoff meeting, it's wise to engage the account team. These are the people who know the client and its business; they have valuable information on who to invite to the kickoff meeting as well as what the agenda should include. Most of the time, a PM is involved with the engagement because the account team is requesting assistance. They know the issues and the best way to talk with the client.

After consulting with the account team, the PM's next step is to talk with the corresponding PM from the client side. If there is no client PM assigned, then try to get one assigned by talking with the account team and ask for a manager or technical person who can fulfill this role. The PM client counterpart is invaluable in establishing the kickoff agenda and identifying the client's kickoff participants.

Finally, after a kickoff meeting agenda has been planned, review the draft agenda with the account team and client PM. Once approved, schedule a kickoff meeting with all identified participants. The meeting is essential to allow the PM to meet all the players and quickly build relationships with the team.

The kickoff meeting is essential to start the project in the right direction. It sets expectations for everybody in the team. Failure to properly plan or execute the kickoff meeting can make the project open ended, with key players not knowing how they fit or how to proceed with the project. Without a solid kickoff, the PM can spend countless hours trying to recover and push the project in the right direction.

### **Key 2: Identify team players**

An IT client-facing project is usually composed of several teams. These include stakeholders, sponsors and core team members. Identifying the project's team members is crucial for the success of the project, but often this is not clear at the beginning of the project. The PM should strive to identify these members as soon as possible through the account team and/or the client-assigned PM counterpart.

Stakeholders are the project members who have a major interest in the project succeeding from a business perspective. This category usually includes high-level management from the client side, and possibly other levels of management. The stakeholders don't necessarily care about

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the underlying technology but are invested in the business results and the value the project adds to the business, so it's important that technical details are kept to a minimum when communicating with them. Carefully identifying stakeholders and catering to their needs is essential to provide the proper reporting and prevent mistakenly upsetting a high member of an organization who later will hamper progress or shut down the project.

Sponsors are usually the people who started the project. This can include various parties from different organizations and companies, but it's usually a mixture of the account team combined with technical managers and advisors from the client side. These folks typically have a commitment to the underlying technology and want to see a specific solution succeed. They help the PM obtain resources as well as serve as a level of escalation when the need arises. They know the underlying history of the project and the landscape of the business. Plus, they can make the PM aware of the political theater at hand. Failure to fully utilize your sponsor team can result in the PM getting lost in the weeds in the technical and political arenas that are out of their control. This can quickly reflect on the project's progress and even cause a project to fail or a PM to be replaced.

Core team members usually include lead architects, managers and technical people from various organizations and companies. Often sponsors are members of the core team group. These team members serve as technical

advisors and help the project manager navigate the various technical issues that arise. Core team members also help the PM find the right resources and answers to unforeseen technical challenges that arise during the project. Proper communications skills are needed to work

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with the core team members; it's essential to recognize them for their hard work. Improper communication and recognition of core team members can result in the project coming to a screeching halt. Such projects are plagued by issues that won't be resolved.

### Key 3: Know your objectives

The project you are about to manage may have a defined scope or might start with an initial set of requirements. As a PM you need to work with your team to understand what the endeavor must deliver — not only as a product or service, but also as a benefit — and aim to structure planning and working toward meeting these objectives.

When the project has a clearly defined scope defined in the Statement of Work, it would be beneficial to create a Scope Statement clearly listing all tasks and activities that will be performed by the team, and explicitly specify all

tasks and activities that will not be performed by the team. All assumptions need to be clear. Have this communicated and accepted by your team and client.

#### **Key 4: Be a servant leader**

PMs may have little to no formal authority over the teams they manage. Therefore, leadership skills are critical for success. A servant leader PM will service their team – their customers will be their team members – and they will empower, develop and motivate the team members to deliver optimal results. A good PM is a good leader who is trustworthy. Successful relationships are built on trust. When the PM can lead by personal example, coach the team, be a great organizer and teacher, you have the good foundations for success.

If you commence the project with the perception that you need to serve your team so that they can be their best selves, you are paving the way for success

#### **Key 5: Define an escalation process**

There comes a time when every PM has to make things happen, like when team members are not doing their work for various reasons, varying from too much on a resource's plate to the resource not liking the PM and refusing to do a task. To make matters interesting, the PM usually doesn't have the power to make

someone do the work. When a task is falling behind schedule, the first thing the PM should do is have a calm conversation with the resource to genuinely try to understand the underlying cause of the delay. Go in with the intention of helping, because being aggressive in tone or manner toward a resource seldom works and is detrimental in the long run. After a heartfelt

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conversation about the problem, the task is typically completed, or the PM can assist by providing additional resources or answers.

There are the few cases, however, where a simple conversation does not work. This is where the escalation process comes into play. One of the first things that needs to be defined when planning a project – even before team members are selected – is the escalation process. A simple but effective escalation process is to follow the company's reporting structure. When an assigned resource is not doing their work and communication channels have failed, it's time to escalate to that person's first level report contact. If that doesn't work, the PM needs to escalate to the second level

report. Very seldom will a PM have to go to a third report level to get a task moving again.

The escalation process should be addressed as early as the kickoff meeting, and it needs the stakeholders' and sponsors' approval. Failure to identify the process at the beginning may invalidate or make the process ineffective later when the PM tries to use it. This can make a project impossible to control.

### **Key 6: Track everything**

Tracking is an essential part of project management and a key component that, if executed properly, contributes to a successful project. On the other hand, if it's executed poorly, it can have disastrous effects.

Tracking is the way the PM keeps a project moving. Unfortunately, projects often get delayed because the tracking part of the project is executed improperly. The scenario usually goes something like this: the PM has a conversation with a resource at a meeting, by phone or in a chat room. The resource tells the PM they have it under control and will have it done by an agreed time. The PM assumes the resource will do what he or she promised. Come status time, nothing has been done. Excuses

range from "I'm waiting for somebody to finish a task" to "My computer got burned when my car caught on fire after entering Chilly Willies to buy a coffee." However, when the PM asks why the resource didn't say something, the answer is usually "You didn't ask!" The moral of the story is that the PM needs to follow up before the target date for a task. A simple email on how things are going with the task should suffice. Also, a task should never extend longer than five working days in my experience. If it is going to take longer than five working days, it needs to be broken down into subtasks. Otherwise, the PM will wake up one day with the project behind by two months and no way to explain how it happened. Proactive tracking needs to happen frequently, or the project will pay with client dissatisfaction, time lost and/or an extended budget.

### **Key 7: Report appropriately**

There are two main types of reporting in a client facing project: technical and stakeholder reporting. Each one of these reports is crucial to the success of the project.

Technical reporting should be done when the core and sponsor teams meet for technical status meetings. This report should have the achieved, immediate and future technical milestones. The main purpose of the report is to show how all the pieces fit together and keep the team focused on the overall goal. Noting any achieved goals will give the team a sense of accomplishment. The immediate milestones will keep the team focused on the tasks at hand, and the future technical milestones will give a sense of direction and purpose. This report should show issues that

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need to be resolved and actions that need to be taken to keep the project moving and on track. Resources often get lost in the day-to-day tasks, and they need to be reminded of the whole project and where they fit in the overall picture. Otherwise, you may find someone doing something detrimental to the project due to lack of understanding.

Stakeholder reporting is just as important as technical reporting. In my experience, PMs try to avoid these meetings for fear of being asked tough questions, but poor execution of the stakeholder report can have dire consequences for a project's success. The purpose of this report is to show the project status at a high enough level to demonstrate major milestones for the stakeholders. In contrast to the technical reporting, the stakeholder report should focus on results, not technical details. Each major milestone should be shown as either green, yellow or red status as described below:

- Green depicts that we're on target or better.
- Yellow states that we're having some difficulties and includes an explanation on how we should be able to get back on track and whether we need the help of the stakeholder or sponsor teams.
- Red means that we have missed a milestone. For items in red status, we need to explain the reason the milestone was missed and put in place a contingency plan explaining how we'll avoid this in the future and what we're doing to correct the situation. Any help needed from the stakeholder or sponsor team should be clearly stated in the report.

## **The first thing that will get a PM in hot water is not telling the truth; evasion and deception catch up with the PM sooner or later.**

Anybody can run a project and show up to a stakeholder meeting when things are going great and everything is green. The challenge arises when things are not going so great and the PM needs to address tough yellow or red status items. The first thing that will get a PM in hot water is not telling the truth; evasion and deception catch up with the PM sooner or later. Honesty with the client and team is a cardinal rule in project management, and in life for that matter. It's very hard to regain the trust of your client and team once lost. The project will get in trouble, and the PM could easily be replaced.

The appropriate way to report yellow and red milestones is by telling the truth of what's really happened and taking responsibility for any issues that are the PM's fault. If someone lied to you, then you need to say that as well. In either case, the matter needs to be resolved, and the PM needs to come to the stakeholder's meeting with an action plan on how things will be corrected. This is where your core team comes into play. The PM may need to consult with the core team to formulate an action and correction plan. This includes technical team members as well as sponsors. When presenting the stakeholder report, core team members need to be present to answer detailed questions to the stakeholder's satisfaction. The action plan should contain a

strategy on how the missed milestone will be corrected, the impact to the project in either time, cost and/or resources, and if any Project Change Requests (PCRs) are needed.

Reporting bad news is never easy, and being at the receiving end of bad news is not very gratifying. However, honesty and a good action plan built with the help of the core team will go a long way in making matters easier. Erroneous or dishonest stakeholder reporting can cause a project to fail. Sooner or later, the PM will run out of time or money and the truth will come out. By then it will be too late to do anything about it.

### **Key 8: Hold regularly scheduled meetings**

To ensure project success, there are two main meetings that should be consistently held:

technical status meetings  
and executive meetings.

These meetings and their frequency should be established at the project kickoff. A good rule of thumb is to have one weekly technical status meeting and one monthly executive status meeting, with the contingency that if the project gets in trouble executive meetings will be held more often.

The regular technical status meetings should start with technical reporting. The format isn't important as long as it clearly shows where the project stands. This should be followed by a discussion of outstanding items. The PM needs to find out how each team member is doing with their responsibilities and discuss any issues or

risks that have occurred. Some issues and risks to the project may need additional meetings or resources to continue the discussion. Holding regular status meetings allows the PM to react to any issues and take the team into corrective action. Poor execution or lack of regular status meetings can result in a very chaotic and reactive project that falls apart sooner rather later.

The executive meeting is where the PM reports the status to the main stakeholders. As discussed under the stakeholder report, this meeting should be about facts on the true status of the project. If the project is in trouble, the PM needs a contingency plan to correct any negative impacts on cost, time or resources for the project. As discussed previously, honesty is the best way to handle executive meetings and reporting. Poor reporting at these meetings will become obvious, and the effects on the project's cost and/or time will be tremendous.

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### **Key 9: Take documentation seriously**

Thorough documentation is something that needs to be taken seriously when dealing with a client-facing engagement. A PM's reputation is not the only thing at stake when an accusation

comes from a team member that affects the credibility of the PM. The PM's company is also at risk. Usually these challenges arise when the project gets into trouble. People start panicking, making excuses and pointing fingers; the last thing they want is to be blamed for something that happened. The PM's first order of business should be to find out what really happened. Do not linger in the blaming game but instead focus on how to correct the issue as quickly as possible, while avoiding making people feel bad for honest mistakes.

Major issues arise when people have been deceptive to the PM or others, the project has been severely impacted, and corrective action needs to be taken. When things go really wrong, folks can turn on each other, and the PM is a very likely candidate to be blamed or scapegoated. A common scenario is when someone claims that they told the PM they needed help and the PM didn't assist them

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in getting what they needed. In most cases, your tracking and escalation process should be enough to keep a project out of trouble. However, documenting everything is critical in the event that someone is being deceptive.

After a meeting, document the minutes in detail as soon as possible, including follow-up action items. If you have a conversation over the phone or in person, follow up with a note reiterating the PM's understanding of the conversation. All minutes and conversations need to be kept and archived for future reference. The PM should not rely on status meeting tracking to find out things that are not being done. Proactive tracking is necessary. Very early in the life of a project, the PM often finds out who are the troublemakers and extra care need to be taken with them. As painful as documenting things is for most people, it is very necessary to cover your back and your company's best interest.

### **An art and a science**

Project management is as much an art as it is a science. Other components to project management are important that are not mentioned, like planning and documenting lessons learned. However, in our experience

these are the key elements that make or break a project. When something goes wrong on a project, it's typically because the PM was not following these key elements due to inexperience or because they are juggling too many projects to give this one proper attention. Usually by the time leaders recognize that a

project is in trouble it has already paid heavily with time and/or budget costs.

In our experience, these nine key elements are the building blocks of a successful client-facing project.



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