

# Islands of Stability

Applying the A<sup>5</sup> Project Management System



Rob Newbold

Do you find it hard to get things done? Do you sometimes feel as though you're in the midst of a raging storm, struggling against the chaos just to keep from moving backwards? Take heart. In this book, prize-winning author Rob Newbold pulls together twenty years of experience at ProChain Solutions to show you the powerful but simple secrets behind ProChain's A<sup>5</sup> Project Management System. You will learn to create your own island of stability, no matter your position inside or outside an organization: practical solutions that will help you have more fun, be more productive, and tame the chaos.

**Rob Newbold**, CEO and cofounder of ProChain Solutions, is one of the world's leading experts on project management using the "critical chain" approach. He is a frequent writer and speaker and author of several books, including *The Project Manifesto* and *The Billion Dollar Solution*. ProChain Solutions is a premier provider of project management software and solutions.



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# Introduction

O, it's a snug little island!  
A right little, tight little island!  
Search the globe round, none can be found  
So happy as this little island.

— THOMAS DIBDIN

No matter where you are in an organization, no matter where you are in your life, it's hard to get things done. There are too many things to do, too many interruptions, too much change; in short, too much chaos.<sup>1</sup> For most of us, this chaos exists in both our professional and our personal lives. We try to build a stable platform on which we can stay in place and weather the storms. But sooner or later, the storms batter our islands to pieces. The stability disappears, and the chaos remains.

There are many tools and methodologies that promise to help, some backed by great success stories. Some

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<sup>1</sup> According to Gallup polling in 2016 ([http://news.gallup.com/file/reports/199961/SOAW\\_Report\\_GEN\\_1216\\_WEB\\_FINAL\\_rj.pdf](http://news.gallup.com/file/reports/199961/SOAW_Report_GEN_1216_WEB_FINAL_rj.pdf)), only a third of employees were engaged in their work; that is, motivated and enjoying their jobs.





talk about easier decision-making, others talk about improvements in quality of life. Some organizations have had billion-dollar impacts. Critical Chain project management, which I'll describe in this book, boasts numerous cases that have resulted in dramatic improvements in speed, productivity, and on-time performance. There's just one problem with all these stories: they're not about *you*. And *you* can't just snap your fingers and make everything change.

When we take a step back, to take (let's say) a senior management perspective of a company, the chaos might look like a hurricane clouding the earth, viewed from far above. You can see some outlines of what's going on, but the picture varies from cloudy to impenetrable. So maybe we ask for more data, maybe we create a new initiative or approach. We put in place Agile, Lean, TOC, EPM, ERP, or any of a bazillion tools or methods. Maybe the clouds part for a while, but soon things go back to the way they were. Chaos.

On the ground, for those of us doing the hands-on work, the picture is consistent and ugly. The chaos is personal and perplexing. The struggle to get something done, anything



done, never ends. It takes the form of too much to do, unknown or changing priorities, missed deadlines, and overall unpredictability. We can see the chaos and the wreckage, and we can try to fix a few things, but fixing the system is just about impossible. Sometimes people just focus on their little area, trying to accomplish something before the next storm. Sometimes they lose hope and just go through the motions. They say, “That’s just the way our system works.”

The “system” they talk about is the *organizational operating system*—the combination of tools, processes, and culture that helps people to get things done together. I’m often asked how to get started changing an operating system. I point people to courses or books or various online resources, but none of that has ever really felt complete. None of it explains, as the King of Hearts says to Alice, how to “begin at the beginning, and go on till you come to the end: then stop.”<sup>2</sup> This book is designed to change that, to show you things you can do today—at whatever pace you choose—in order to be successful in the midst of chaos. I’ll show you the A<sup>5</sup> Project Management System, an operating system that will allow you to make a difference, in your personal life or in your company, no matter where you are in an organization. I’ll show you how to hold back the chaos by building islands of stability.<sup>3</sup>

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*. . . the A<sup>5</sup> Project Management System . . . will allow you to hold back the chaos by building islands of stability.*

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<sup>2</sup> Lewis Carroll, *Alice’s Adventures in Wonderland* (Macmillan, 1865), chapter XII.

<sup>3</sup> Please check out <https://www.a5system.com> periodically; we will be posting various tools and materials there.

The first step of the journey, chapter 1, is to dive into the midst of the chaos to really understand the problem. In chapter 2 I will define (or redefine) a few terms and go over the five A's in the A<sup>5</sup> system. The next four chapters are playbooks: how-to descriptions for project managers, individuals, functional managers, and senior managers.

These playbooks help you to operationalize the A<sup>5</sup> components—Agree, Align, Advance, Assess, and Adapt—so that you can build a great island. You'll still need to make sure it stays on track, so chapter 7 gives some more advice regarding the last three A's: Advance, Assess, and Adapt.



**A<sup>5</sup> Project Management System**



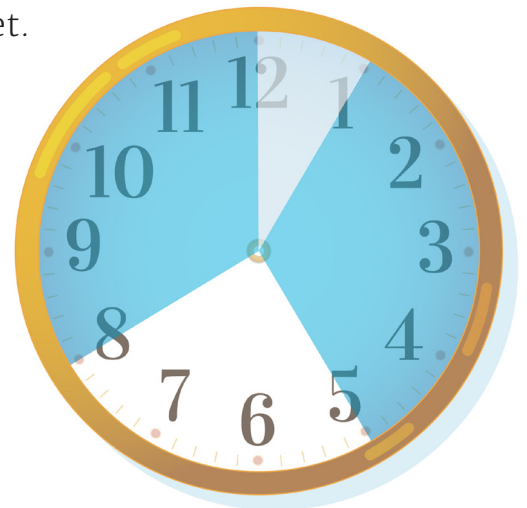
# The Problem

**L**et's start with the most detailed situation and consider how an individual's day might go, then work our way up to see how that affects the performance of projects and project organizations.

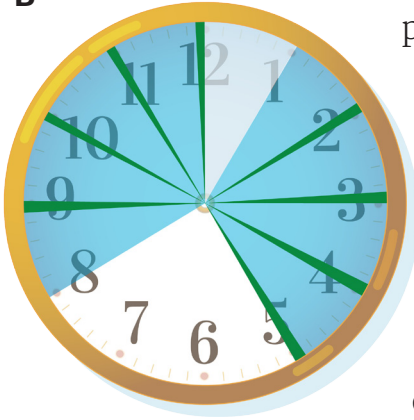
## A Day in the Life

Suppose you're an engineer, and you've been assigned to work on the design of a new widget. It's exciting and high priority, so you imagine arriving at 8 a.m. sharp and look forward to a full day of interesting, productive work. Here's how the dream picture might look when we take an hour for lunch (A).

The problem is, no one can ever focus for eight hours on what they want to do. People expect you to check your email periodically. I'll



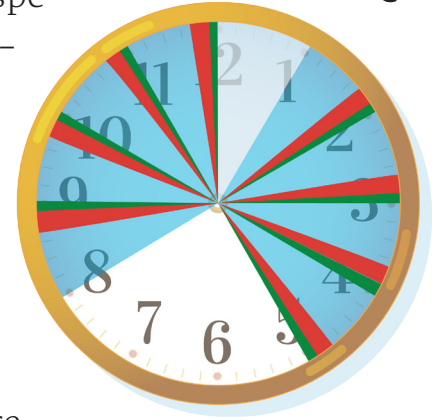
B



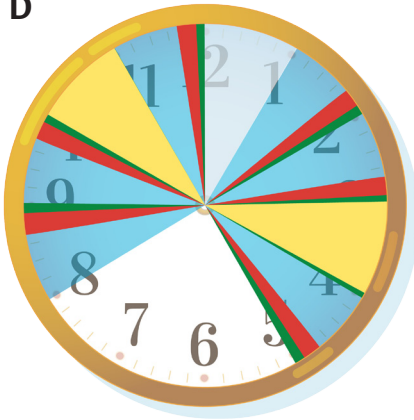
put in a few time slices so we can see how that might look (B).<sup>1</sup>

You're also expected to deal with phone calls and other interruptions, especially in a cubicle environment. We do need to be responsive to the needs of others. Let's add some red time slices for that (C).

C



D



Then there are the inevitable, interminable meetings.

Let's be conservative and pretend there are only two, the yellow slices (D). Let's also assume they start and finish on time.<sup>2</sup>

Of course, in most parts of the world, you won't have just one task or project to work on. We'll add only one more, which is extremely conservative. It's

1 This is extremely conservative. One survey (<https://globalnews.ca/news/3395457/this-is-how-much-time-you-spend-on-work-emails-every-day-according-to-a-canadian-survey/>) suggests people spend 18 hours a week on email, another (<https://www.washingtonpost.com/news/the-intersect/wp/2016/10/03/how-many-hours-of-your-life-have-you-wasted-on-work-email-try-our-depressing-calculator/>) 20.5, and yet another ([https://www.huffingtonpost.com/entry/check-work-email-hours-survey\\_us\\_55ddd168e4b0a40aa3ace672](https://www.huffingtonpost.com/entry/check-work-email-hours-survey_us_55ddd168e4b0a40aa3ace672)) 31.5.

2 Atlassian (<https://www.atlassian.com/time-wasting-at-work-info-graphic>) claims people average sixty-two meetings a month, with thirty-one hours of that wasted. But, of course, this may be nonsense (<https://blog.lucidmeetings.com/blog/fresh-look-number-effectiveness-cost-meetings-in-us>). So pick numbers that work for you.

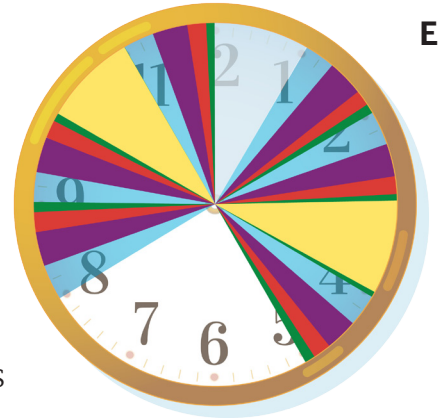
shown with the purple time slices (E).

And there's one final piece. Every time you pick something up to work on, it takes some ramp-up time to remember where you were and get back into it. Depending on the work, those switching costs can be anywhere from a few minutes to half an hour or more, but for this book let's once again be very conservative and say five minutes, as shown by the gray time slices (F).<sup>3</sup>

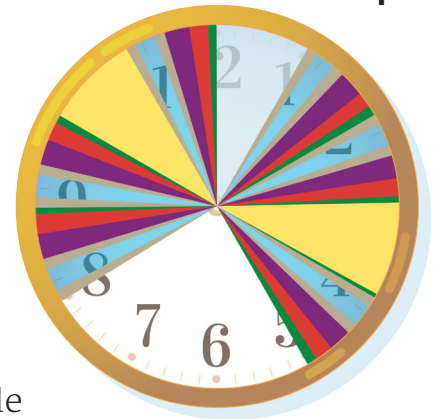
This clock, this kaleidoscope, is the face of chaos in most work environments.

Remember the project you were excited about? The blue slices, reminiscent of the blue sky peek-

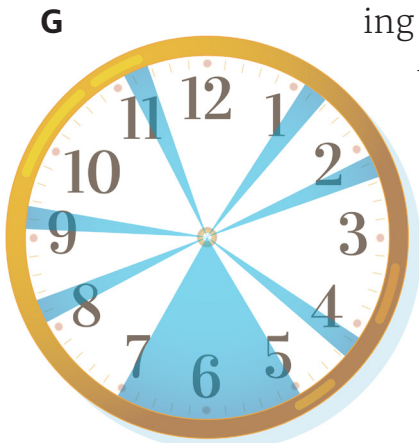
ing through the clouds (G), suggest that you're lucky to get any work done on that project. Most people end up spending personal time doing work.<sup>4</sup> Even then, they're lucky to accomplish much.



E



F



G

3 Dr. Gloria Mark, at the University of California, Irvine, has done a lot of research on interruptions and task switching ([https://www.ics.uci.edu/~gmark/Home\\_page/Publications.html](https://www.ics.uci.edu/~gmark/Home_page/Publications.html)). Once again, you can get very different estimates of time lost based on the context and the research.

4 According to a 2015 Harris Poll report (<https://resources.workfront.com/ebooks-whitepapers/the-state-of-enterprise-work>), "82% of office workers log into work outside of standard business hours during a typical work week; more than half log in every day (52%)."

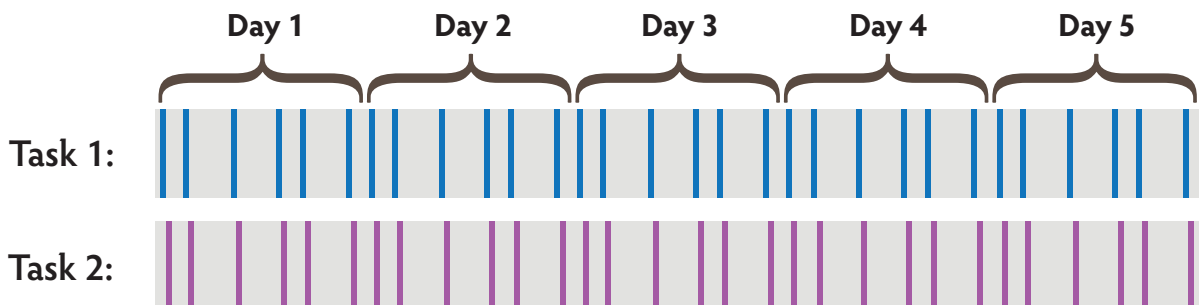


The end result, from a personal perspective, is exhaustion and frustration. You feel like you've been pedaling a hamster wheel to nowhere. You're constantly making compromises between family life and getting real work done. From a business perspective, your work isn't even predictable. Who knows how often you'll be interrupted, or how many things you'll be given to do over the next week?

I started this section by pretending you're an engineer, but in my experience practically everyone feels too much stress and frustration.

## Projects and Portfolios

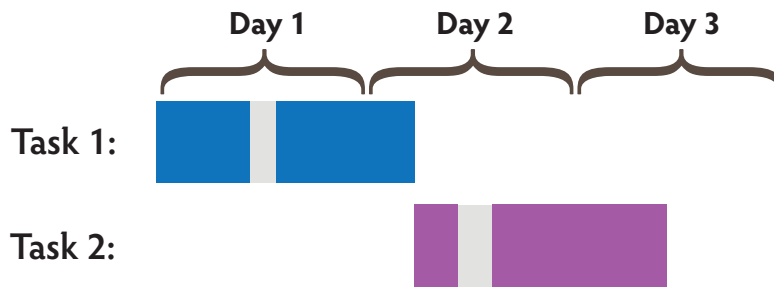
I just described what happens with individuals. Unfortunately, it doesn't begin to describe the impact on organizations. First, consider how this daily grind affects individual tasks. In a "business as usual" world, things are set down and picked up a lot. There's also a lot of time when you aren't working on your tasks. If we roll the kaleidoscope across a week, we get this picture:





This picture shows how the work done in the kaleidoscope spreads across the five days that might be required to complete the two tasks. Time moves horizontally; the blue and purple areas represent work, the gray areas represent time in which nothing is done on the given task. Here, it takes about five days to accomplish maybe ten hours of work on each task. That's actually very optimistic.

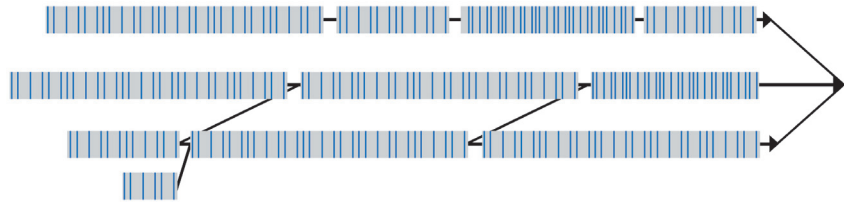
What would happen if someone could actually focus on this work?



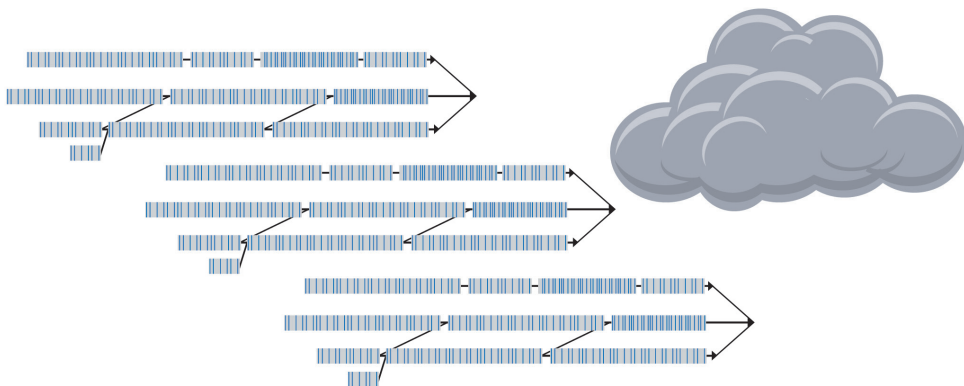
Both tasks would be completed much more quickly, Task 1 in a quarter the time. As long as you prioritize the tasks, focus on them, and get them done, it almost doesn't matter which task you choose to start first. They would all be completed much more quickly. And when people can focus on their work, they also enjoy it more. Not only is focusing fun, it's probably closer to what we signed up for. Most people don't base their career choices on the opportunity to attend meetings or slog through email.

Now think about how these task pictures might map to the project and portfolio level. Here's a picture of a

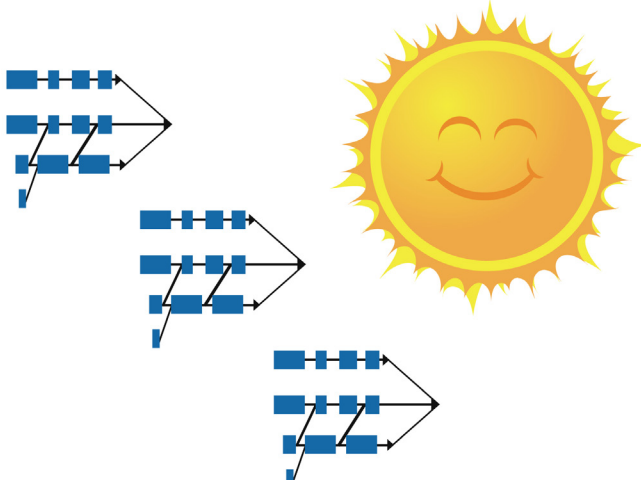
bunch of linked tasks that form a project, worked in the “normal” way. Time goes from left to right, the boxes represent tasks. The black lines represent dependencies—the successor on the right couldn’t start before the predecessor on the left finished. Due to the randomness of the different kinds of interruptions, this project appears to have been very unpredictable, even chaotic. The blue bars, representing actual work, are scattered haphazardly across the timeline. As a result, the project has taken much longer to finish than a reasonable person might expect. This is a common occurrence.



At the portfolio level, the chaos might appear this way. Think of the gray areas as clouds of the hurricane. In real life, the picture tends to be much more chaotic, because most organizations have far more than three projects and little in the way of clear priorities between them.



If everyone could actually focus, the picture might look like this. More projects done more quickly, more predictably. Sunshine.



Clearly, there is great potential benefit in reducing or eliminating the chaos. People are happier at work, project completions are faster and more predictable, and many more projects can be completed. Is this actually possible?

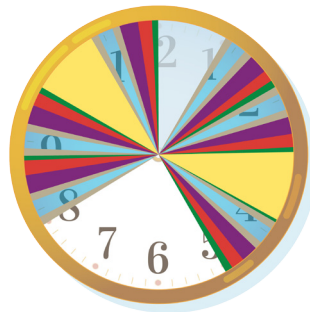
Yes, of course, or I wouldn't have written this book. In a philosophical sense, it's clear that much of the chaos—the variation—is due to how we work together. That means it's largely self-inflicted, so much of it can be controlled. But to answer the question in a useful way, we have to figure out two things. First, **what would we have to change, in order to reduce the chaos?** And second, **do we have enough influence to make a difference?** For the moment, let's leave aside the question of "how" for later chapters, and focus on these two questions.

## What would we have to change?

At its heart, the chaos is about having too much stuff to do. If I have twenty things to work on, it's hard to make the right choice. Furthermore, the more stuff I have to do, the more I'm likely to multitask—that is, switch from one thing to another without finishing any of them. The impenetrable, chaotic cloud cover is composed of all that “stuff.”

This makes the question of what to change very simple to answer. To create an island of stability, we need to do two things: reduce the amount of work, and work what's left to stable priorities. And what is reducing the amount of work, besides putting some work at the bottom of the priority list, where it may never happen? Therefore, I'm very comfortable saying that a large part of the chaos that exists in your life, whether at work or at home, comes from unclear or constantly changing priorities. Going from

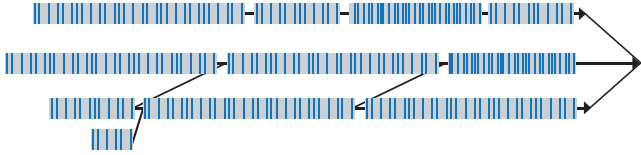
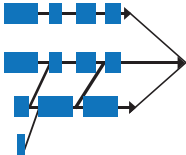
This:



to this:



Or this:  to this: 

Or this:  to this: 

In other words, going from ...



to this:



... is mainly a matter of deciding what to work on, focusing on it until it's done, then moving on to the next thing. At ProChain, we summarize this as “prioritize, focus, finish.” This may sound simple, but it's not. It's actually a lot of work, and there are obstacles everywhere. It requires people to agree on those priorities and work to them, and that's hard.

We can see how hard it is to agree on stable priorities using a very simple example. Suppose you have two five-day tasks to work on, suppose they're both absolutely critical to your company, and suppose you have managed to get rid of all the interruptions. Scenario 1 below shows a picture of what you might expect to happen, with the

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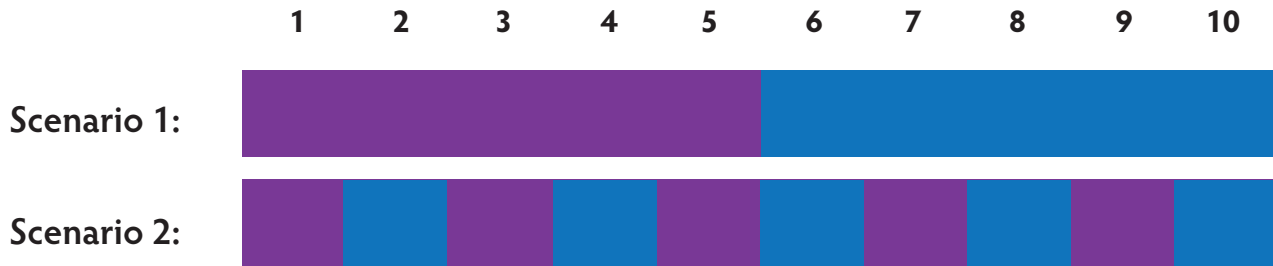
***Prioritize.***

***Focus.***

***Finish.***

---

days counted off along the top. You complete the purple task in five days, the blue task in another five.



But after a day of not working on the blue project, the blue project’s manager (or sponsor) could be understandably upset, and ask you to work on his; so you switch over. But then the purple project’s manager gets upset, asks you to switch back, and so on. The end result will be more like Scenario 2: the purple task takes nine days, the blue task ten days. That’s 80 percent longer for the purple task—without even considering the switching costs and seemingly inevitable interruptions.

To answer the question posed at the start of this section, to reduce the chaos, you would have to change how you prioritize, focus, and finish. This leads to the second question:

### **Do we have enough influence to make a difference?**

We like to believe that bad weather always comes from somewhere else. We feel that we can’t do anything about

the weather, and that we can't do anything about organizational chaos. I can't speak to the weather, but you can change the level of organizational chaos. I can prove it by asking you to consider when you, personally, last had a critical, tight deadline to make; whether it was finishing a term paper, cleaning the house for a visit from the in-laws, or reviewing a document at work. What did you do?

The priority was really clear, so chances are you found ways to focus and get the job finished. You prioritized it above all the other things that were less important. Maybe you stayed home from work "sick," maybe you left the kids at the neighbors, maybe you turned off the phone or email alerts. You did everything you could to ensure that you could focus on that one deadline. And maybe you were even successful.

This means there are things you can do to tame the chaos. That's good news, and that's the focus of this book. However, taking on the chaos requires planning and discipline—two things that don't thrive amidst day-to-day commotion. I'll devote the rest of this book to describing how you can make a difference—the planning and discipline you can use to improve the situation, whether you're a mid-level manager, a senior manager, or just someone who wants to get something done.

I will describe how to create "islands of stability," areas of reduced chaos and increased predictability, where people get more done and have more fun doing it. I've written four generic chapters or *playbooks* for project managers, individuals, functional managers, and senior

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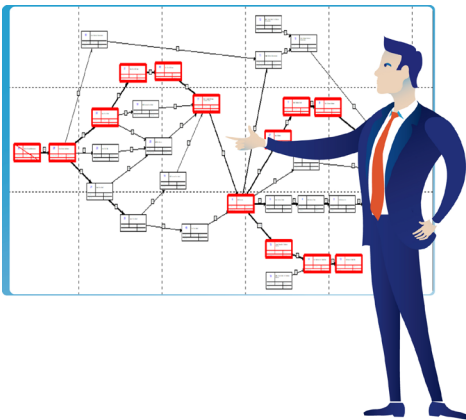
*"Islands of stability" are areas of reduced chaos and increased predictability, where people get more done and have more fun doing it.*

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managers. Once you've gotten through them, I encourage you to work with your colleagues to write your own playbook that deals with your specific situation.

Each playbook covers the components of the A<sup>5</sup> system: Agree, Align, Advance, Assess, and Adapt.

- 1. Agree** on the vision. This means working with people to decide what the vision is, what success looks like, and who needs to be on the island.



- 2. Align** on the plan. A *plan* is all the things you expect to do in order to achieve the vision. How will you create your island? If you wing it, you're almost sure to miss the target.

- 3. Advance** toward your vision; act on your plan. Prioritize work, focus on it, and get it finished.

Your island is built, you're now advancing effectively, but you're not done. Things change. That's why you need the final two components:









**4. Assess** the current situation. You will need to understand how things have changed before you can decide how to respond appropriately.

**5. Adapt** as circumstances change. As you enjoy your island, you will have to make sure that it remains an island of stability. It will need to change and grow; because for any island, if it's not growing, it's shrinking.

There is, of course, the question of whether we have the willpower to make a difference, and my answer is: maybe. The key is to do enough planning and follow-through to break the work into bite-sized, organized pieces. The problem, in a chaotic world, is that when you're working on one thing, there is great pressure to work on something else. In the middle of a fire, talking about fire prevention seems like the wrong thing to do—unless the fire never goes out. Then it's the only thing to do.

In my view, a major reason that we don't have stable priorities is that we have cultures that make us feel good about



action and bad about planning. I hope that, by reading this book, you can get some ideas that will make planning easier and help you tame the chaos.

## LESSONS FROM CHAPTER 1

- The chaos can be seen in how people do their work, every hour of every day.
- In most organizations, most of the variation we encounter, and hence most of the chaos, is inflicted on us by the way we work together.
- Reducing the chaos requires setting and working to clear, stable priorities.
- Agree, Align, Advance, Assess, and Adapt.

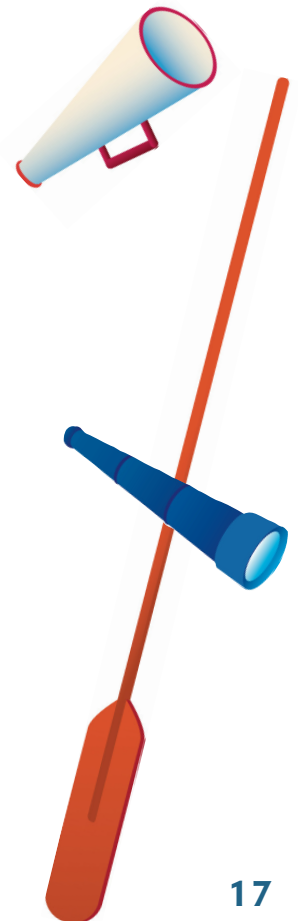


# Island Bits and Pieces

**I**n this chapter, I'll define and discuss a few bits and pieces of organizational operating systems. That background will make it easier in later chapters to focus on the how-to of building your own island.

In the corporate world, we think of our companies and departments and teams as distinct groups or "islands." We often think in terms of three types of inhabitants of these islands: the leaders, the managers, and the workers. The leaders are those whom everyone follows to wherever the group is going; the managers are those who tell people what to do; and the workers are those who do the actual work. They're all connected by an explicit organizational chart and swimming in a slippery soup of established behaviors and relationships that we call culture.

These concepts seem simple and intuitive. Unfortunately, I've found them all to be somewhere between useless and wrong. In this chapter, I will explain why and give you my definitions, because they may help explain assumptions I make through the rest of this book. In the end you may conclude, as I have, that everyone needs to be simultaneously a leader, a manager, and a worker;



and that culture goes much deeper than behaviors and relationships.

## Leaders

There are many books about leadership. A few of them actually define the term, but no two definitions are the same. If a leader is just someone whom everyone follows, then anyone with a gun can be a leader. The problem with that definition is that, too often, the followers will run away at the first opportunity. In my view, *leadership* is very simple: it is the art of selling a vision. A *leader* is someone who sells a vision; a good leader also has passion and integrity. Leaders practice leadership by selling a vision of what they and their followers plan to accomplish.



This implies some important characteristics of a vision: it's something people will buy, and it stresses something you can be passionate about. So, for example, a company vision of “faster, better, cheaper” isn't going to be very effective; a company vision of “Our

ultimate purpose is to inspire and develop children to think creatively . . .”<sup>1</sup> could work well.

In constructing your island, and probably in building your career, you will be better off if you can sell your visions—in other words, if you can behave as a leader. That doesn’t require formal organizational power or a high-level organizational position; it doesn’t mean taking power away from someone. It does require passion and integrity, and it requires willingness to promote the vision.<sup>2</sup>

## Managers

We tend to think of managers as bosses, the people who tell other people what to do. I first encountered this concept at age four when interacting with my older sister. At that time, I discovered that I don’t actually like being bossed around. Subsequently, I discovered that I’m not unique in this respect. Nobody likes being bossed around.<sup>3</sup> This means that the traditional managerial role

---

1 This is a piece of the LEGO Group vision (<https://www.lego.com/en-us/aboutus/lego-group/mission-and-vision>).

2 In other words, it’s not for everyone.

3 This is actually a well-known psychological concept called “reactance” ([https://en.wikipedia.org/wiki/Reactance\\_\(psychology\)](https://en.wikipedia.org/wiki/Reactance_(psychology))). People respond negatively to limits on their behavioral freedoms or to pressure to accept a particular view or attitude.



automatically creates conflicts. Over time, I have come to a somewhat different view regarding the role of the manager.

You, as an individual, have amazing capabilities. At any given time, there are arbitrarily many things you could do. You could take a nap, remodel the bathroom, focus on a task at work . . . almost anything. Ideally, what you and your colleagues choose to do at work depends on what's most important in order to help achieve your organization's vision. That's your top priority. The manager's main job is to help people figure out and work to their top priorities, the priorities that best advance their shared vision.<sup>4</sup> A person's top priority at any given time might be to work on a task. It might be to learn a new skill, communicate with colleagues, or even take a break.

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<sup>4</sup> This holds whether you're talking about managing time or money, and whether it's yours or someone else's.





To put it more succinctly: **A manager's primary job is to help people focus on the right things.** That statement has a few implications:

- Given that we all need to manage at least our time and money, everyone is responsible for managing something. If we want to manage well, we need to be able to set clear, stable priorities.
- If you can't set priorities or you can't connect your priorities to your vision, you can't manage. Fighting each fire as it becomes the hottest is not management.
- You shouldn't accept any work for your group or for yourself without trying to understand and communicate its priority and its effect on other priorities.
- The most valuable way to improve your management skills is to learn better how to help people—including yourself—focus on the right things.



You might sense a tie-in with chapter 1. That’s because this book is dedicated to helping managers learn to reduce the chaos by setting and managing priorities. In other words, I hope to help you to be better at your job—whether you’re managing your own time, a group of people, a project, or a whole organization.

## Workers

I have heard people use the term PDW (“people who do work”) or Individual Contributor to define workers. In my book,<sup>5</sup> everyone who works in an organization is a worker. People whose job titles say “manager” or “CEO” are workers, even when they’re not designing products or operating machines.

## Culture



When I think of the word “culture,” I first think of cultural organizations: the Louvre, the Kirov ballet, the Chicago Symphony. Do those organizations bear any relationship to being late to meetings, or checking your email every five minutes, or working to task due dates? They do, because all are closely related to our culture.

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<sup>5</sup> Specifically, this book.

Culture is a very broad concept. It links us together and it divides us in many ways. We describe it with terms like values, beliefs, principles, assumptions, norms, ways of thinking, and on and on.<sup>6</sup> The sheer number of definitions guarantees that culture will seem fuzzy. The biggest problems I see in talking about culture or culture change are that either we don't define the terms, or when we do they're not useful. For example, if culture is, at heart, shared tacit assumptions,<sup>7</sup> then where did they come from, how do we get at them, and how do we change them?

I find it useful to think of culture as a shared emotional response to a particular type of stimulus, whether that stimulus is a type of information, situation, or action. Does a group share a love or dislike of something, an understanding of what's right versus what's wrong? That's probably part of its culture. The arts typically convey information to create a shared emotional response, so they are part of our societal culture. A group's emotional response to people being habitually late to meetings can be positive, meaning that it's an accepted part of their group's culture; or negative, meaning it's not. Very often, planning makes people feel uncomfortable, because that is their culture's emotional response.

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6 See, most simply, [https://en.wikipedia.org/wiki/Organizational\\_culture](https://en.wikipedia.org/wiki/Organizational_culture).

7 See Edgar Schein, *The Corporate Culture Survival Guide* (Jossey-Bass, 1999), 19.

It's difficult to explore culture, because people are very good at justifying their emotional responses without thinking about why they exist. Fortunately, we don't need to explore the ramifications of emotional responses here. The key for now is to understand that true culture changes can only occur at an emotional level. Logic won't get you to culture change. Past a certain point, logical explanations won't make something feel better, they'll just make it feel boring. We want to feel good about the new things that we try.

Culture change gets harder when there's a conflict between how something is supposed to make us feel (from the new behavior) and how it already makes us feel (from the existing culture), because the existing feelings will usually win. For example, suppose you want people to feel that it's ok to communicate honestly about project status, but they're very uncomfortable doing that. How will you make them feel good about it? How will you make that part of the culture?

The answer, of course, is Change Management.<sup>8</sup>

## Organizational Change

As you can imagine, islands of stability can require some big changes, for individuals and for organizations. The

*I haven't got the slightest idea how to change people, but still I keep a long list of prospective candidates just in case I should ever figure it out.*

— DAVID SEDARIS

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<sup>8</sup> Note that I am using “change management” as distinct from “change control,” which is about managing the scope of a product or system. Change control is important, but not a topic of this book.

changes may seem extremely daunting. We know individual change—how we interact with people, what we’re addicted to, how much we eat, and so on—is difficult. It’s also hard to change an organization’s culture. We are dismayed to hear statistics like “70 percent of organizational change efforts fail.”<sup>9</sup> You know intuitively that change is hard if you’ve ever tried to get a child or spouse to change some annoying behavior. Sometimes we think, “It’s hard to get people to change, so why bother?” I’ve heard senior managers say, “I’d like to make things better, but I think the change would be too difficult, so—no thanks.”

Before we jump to the conclusion that all is vanity and vexation of the spirit, there are a few things I need to explain. First, **it’s never about change**. It’s about the vision. If you start an initiative by saying, “Let’s change everyone,” or (to use an example from this book), “Let’s all work to our priorities,” chances are you’re doomed. But if you say, “Let’s all make work fun and productive again,” or “Let’s get this life-saving product on the market in record time,” you can excite people. If

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*... it’s never  
about change.  
It’s about the  
vision.*

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<sup>9</sup> This statistic is commonly cited, but it’s basically made up; see, for example, <https://www.tandfonline.com/doi/abs/10.1080/14697017.2011.630506>. A survey by Bain & Company (<https://www.bain.com/insights/orchestrating-a-successful-digital-transformation/>) indicated that 5 percent of companies executing major digital transformation efforts had achieved or exceeded their expectations. The number went up to 12 percent for “conventional” transformation initiatives.



### HOW HARD IS CHANGE?

you can harness that excitement to create positive feelings, if you can get everyone pulling together toward a vision they find meaningful, the culture change will be a byproduct of achieving the vision. The lesson is, **sell the vision**. That's why step 1 of building an island, Agree, requires a vision.<sup>10</sup>

Second, it's not about you. It's not even about me. **It's about us**. That's why I use words like "Agree" and "Align." I see lots of consultants and managers who treat organizations as sets of chess pieces they can move around, coming up with elaborate strategies for how to move the pieces. They train people and tell them how to change, then hope that the changes will stick. Usually

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<sup>10</sup> I've met senior managers who periodically inject disruption into their organizations solely in order to force people to rethink how they work. This can produce benefits, but it still requires a vision of where you want to go. Otherwise, you just get a disrupted organization.

they don't. People aren't chess pieces. Change is painful, but visions can be exciting. The lesson here is, **involve everyone in realizing the vision.**

Finally, **culture doesn't have to control us.** How you feel about something, and the extent to which other people reinforce those feelings, doesn't determine whether that thing is good or bad. If you feel good about interrupting someone who is working on a critical task for the number-one project in your company, maybe you should rethink your feelings; even if the person you're interrupting feels the same way you do.

## Setting Priorities

Priorities are a manager's main job. Good priorities are what get you to your goals quickly and effectively; whether you're managing time, money, or people. There are a few ways you can set priorities:

- **Analyze** what is most likely to work best. That means using the tools, data, and understanding you have available to essentially predict the future and decide what will get you to your goals most quickly and effectively.
- **Guess.** If you look carefully at the clock example from chapter 1, you'll discover something amazing: whether you work first on the blue task or the purple task, both will finish much more quickly if

you focus. This means that often, random priorities are better than no priorities. The problem is that random priorities are difficult to justify. That means it will be hard to stick with them, which means your priorities won't be very stable.

- **Follow cultural norms**—whatever approach is commonly accepted as “good.” For example, one cultural norm is to work on whatever the computer system says. Another is to work on whatever your boss says is highest priority. Cultural norms can be dramatically wrong, as for example when multitasking is a cultural norm.<sup>11</sup> They are also necessary, because no one can possibly analyze everything.

To create a stable island, you'll need analysis tools. I cover some Critical Chain tools in subsequent chapters. You'll also need to think about the culture, because when your island is up and running, people will need to follow

norms that let them quickly distinguish “good” priorities from “bad” priorities.

In short, you'll have to rely both on tools and on each other.



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<sup>11</sup> As we saw in chapter 1, multitasking makes everything take longer.



## LESSONS FROM CHAPTER 2

- A good leader is someone with the passion and integrity to sell a vision.
- Management's primary job is to help people focus on the right things to achieve the vision.
- True culture change occurs at an emotional level.
- It's never about change; it's about a vision. Sell the vision, and the change will happen.
- It's about us. Involve everyone in realizing the vision.
- To change your culture, rethink your shared feelings.

### **What you can do right now:**

- With anything you manage, think in terms of setting and working to priorities.
- List the top five things that people commonly feel to be “good” and “bad” in an organization you're part of. How do those feelings affect priorities? How should they?



# Project Manager's Playbook

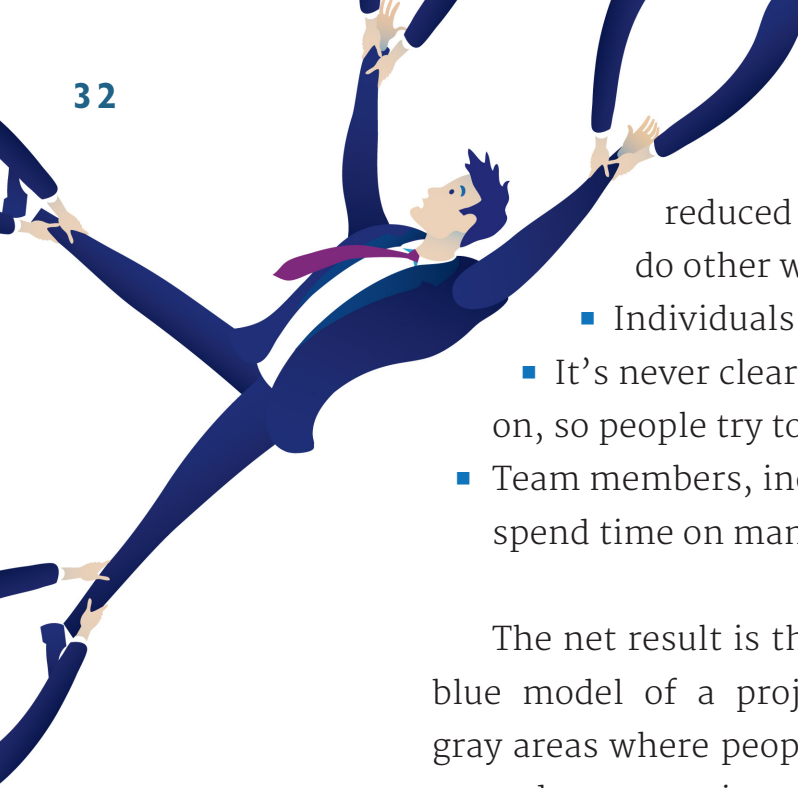
In this chapter, I'll describe how you, a (generic) Project Manager, can build an island of stability.<sup>1</sup> Talking about PM islands of stability seems kind of odd, because most projects appear inherently stable. A budget is approved, a time frame is set out, and a team is assigned. There remains only to do the work. The PM merely needs to point people in the right direction and stay out of the way, right? How hard could it be?

Alas, reality is never so simple. How many of these problems have you experienced?

- There are risks and surprises along the way.
- The amount of needed work keeps expanding.
- The ground is constantly shifting, as budgets are

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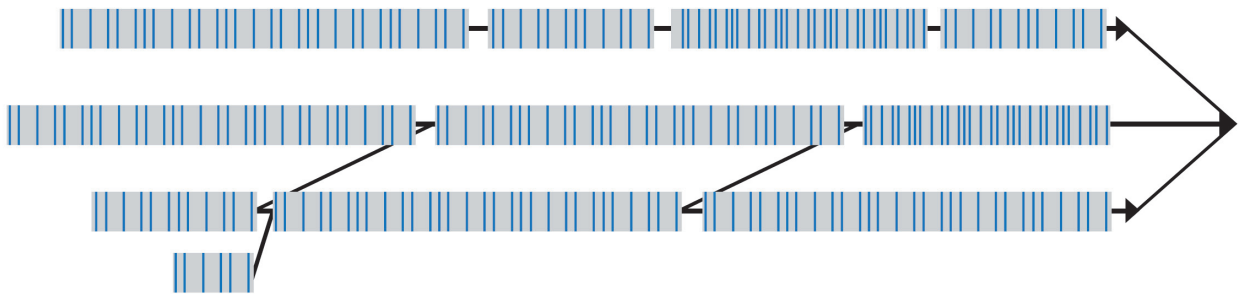
<sup>1</sup> Note: People define many different roles in the management of projects. For example, *Project Lead* often refers to the person responsible for the external, customer-facing, and management-facing responsibilities. The *Project Manager* sometimes refers to the person responsible for making sure the work is done properly. *Scheduler* refers to the person responsible for the schedule. In this document, I use the term *Project Manager* to refer to the combination of these roles.



reduced and resources are siphoned off to do other work.

- Individuals have trouble focusing.
  - It's never clear what is most important to work on, so people try to work on everything.
- Team members, including the PM, are expected to spend time on many projects.

The net result is the chaos shown in this gray-and-blue model of a project's workflow: lots of random gray areas where people are multitasking and work sits around, even on important projects. Reality is usually even worse, because real projects are more complex, and (as we saw in chapter 1) I've understated the chaos.



Meanwhile, you as the PM are responsible for the success or failure of a project, where success is defined by the usual requirements: time, cost, quality, and functionality. You may not be able to “make” people do things. You may not have the authority to say who gets hired or fired, although you may have some say over who is on your team. However . . . you can bring issues

to senior management when the project is in jeopardy. Most important, as a manager you can help people set and work to good priorities.

The components I'll describe here are based on the Critical Chain approach as taught by ProChain. There are certainly other ways of achieving an island of stability for a project, as long as you follow the five components of the A<sup>5</sup> system: Agree, Align, Advance, Assess, and Adapt.



## **Step 1: Agree on the vision.**

### **1a: Describe the island's vision.**

Let's assume you have certain goals for your project—maybe finished as quickly as possible, with minimal budget, all required features and acceptable quality, and so on. That could lead us to the project vision, but it might not be very exciting for other people you want as island-mates. It could be hard to sell, and it doesn't

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*If team members feel empowered to focus on what they're good at, they are more likely to meet or exceed the project's goals.*

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necessarily have much to do with stability. Let's try something a little more radical:

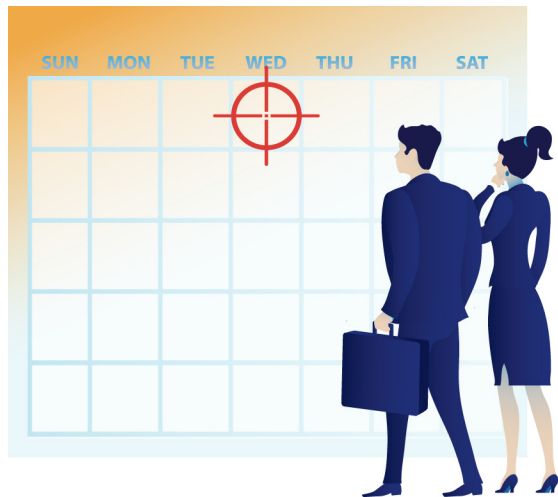
**Team members feel empowered to focus on what they're good at, to meet or exceed [the project's goals].**

If you added the specifics of your project's goal, why it's important to the company or the world, you would have a vision you might be able to sell. However, empowering people to focus means you have to overcome the chaos that is so common in the normal work world. You have to be able to set clear, stable priorities. This vision, therefore, requires an island of stability, which implies a sea change in how people work.

This seems like a good place to talk about **deadlines**, because deadlines are a common feature of project goals. A deadline is a date that someone believes he must hit or suffer serious negative consequences. Deadlines

are generally considered to be part of good management: create clear, measurable goals, and hold people accountable for them. Dates are a tried and true mechanism for spurring people to greater efforts.<sup>2</sup> A quote often attributed to Leonard Bernstein goes, "To achieve great things, two things are needed: a plan and not quite enough time."

Unfortunately, deadlines result in significant problems. In trying to create




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<sup>2</sup> Deadlines have high "goal specificity," meaning the goal of the activity is very explicit.

predictability, you can actually create the opposite—chaos. I've written a paper<sup>3</sup> that describes some problems with deadlines. Here's a brief synopsis:

- Amy, a manager, gives a deadline to Bob.
- Bob, who wants as much time as possible, negotiates with Amy. Note that this interaction makes sure that the actual amount of work, and how predictable that amount is, stays hidden.
- If Bob has extra time before the deadline, he doesn't finish early, but instead uses the time to do other things. That is, he multitasks.
- If Bob doesn't have that extra time, he has three choices:
  - ▶ Deliver poor quality,
  - ▶ Work extra hours, and/or
  - ▶ Be late.

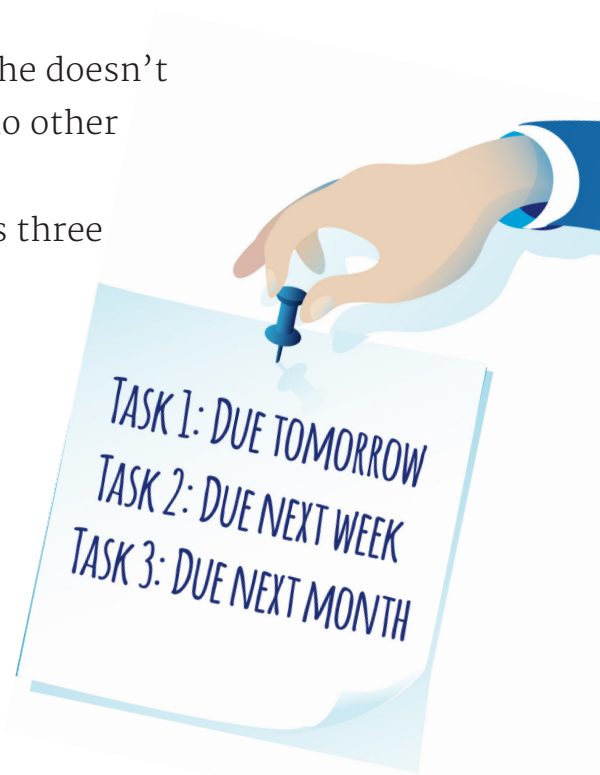
This is how deadlines incentivize safety time, without incentivizing early completion. When perceived to be impossible, they create significant stress.<sup>4</sup>

The problem with deadlines goes beyond safety time, because deadlines are often assumed

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<sup>3</sup> [https://www.prochain.com/wp-content/uploads/2017/07/Tyranny\\_of\\_Deadlines.pdf](https://www.prochain.com/wp-content/uploads/2017/07/Tyranny_of_Deadlines.pdf)

<sup>4</sup> And lying. I've seen plenty of project schedules that exist only to show that the deadline is achievable, when—as the project team well knows—it is not.



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*Let the vision drive the sense of urgency.*

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to represent priorities. For example, Bob will assume that the task due tomorrow has a higher priority than the one due next week; even if the task due next week is critical for the most important project of the company. In other words, **deadlines obscure the real organizational priorities.**<sup>5</sup>

The trick is to express the urgency contained in a date, without turning it into a deadline. If you're really lucky, your deadline might be perfect. Otherwise it will limit your team: to the impossible, if the date truly isn't possible; or to the mediocre, if the date is too easy. We want to switch focus from dates to the vision. We want to go from a picture in which the deadline drives the sense of urgency, which drives the importance of the vision; to a picture in which the importance of the vision drives the sense of urgency and the date.

In order to have a specific goal without many of the drawbacks of a deadline, a reasonable solution is to use ranges of dates to express the likely time frame in which something will finish. The earlier date is the aggressive "stretch" goal; the later date is the "safe" goal if (or when) things



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<sup>5</sup> This problem, urgency trumping importance, can occur even if you understand the relative importance of the tasks; see <https://www.washingtonpost.com/news/speaking-of-science/wp/2018/05/24/how-deadlines-thwart-our-ability-to-do-important-work-and-what-we-can-do-about-it>.



go wrong.<sup>6</sup> Later in this chapter, I will introduce the concept of “project buffers,” which are date ranges for project completions.

### 1b: Decide who should be on the island.

As a generic rule, thinking in terms of the organizational chart, you'd like to have the people below you and immediately above you on your PM island. With that in mind, you'd want to include at least the following people:

- You (the PM)
- Your boss
- The project sponsor
- The team members

Your boss and the project sponsor may not decide to live on your island, but at least you should keep them informed. You may bring others on board, depending on the situation, and depending on who wants to join you. There may even be indigenous natives, people who are already using the approach you plan to apply.



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<sup>6</sup> There is research to support the value in doing this; for example, see M. Scott and S. Nowlis, “The Effect of Goal Specificity on Consumer Goal Reengagement,” *Journal of Consumer Research*, 40 (3) 444–459, October 2013 (<http://homepages.se.edu/cvonbergen/files/2013/01/The-Effect-of-Goal-Specificity-on-Consumer-Goal-Reengagement.pdf>).

### **1c: Get agreement on the vision.**

Those who don't share your vision won't help you achieve it. They'll just be tourists. That means you'll have to talk with your hoped-for inhabitants and explain what you're trying to do: sell them on your vision. That may result in changes to the vision, because other people do have good ideas. You may also discover that there are people who don't belong on the island, or even on the team.

You will have to communicate the vision, and sometimes translate it, for people inside and outside your team. You will have to explain why it's important. For example, when talking with the project sponsor, you may have to explain why allowing people to focus on their priorities will help the team to meet or exceed its goals.

### **1d: Define "success."**

Of course, you need your project to meet its goals. You'll need to know if it's meeting requirements for time, budget, functionality, and quality. But to have an island of stability, to achieve the island's vision, you'll also need to know if people are able to focus on their work. All this implies two types of measurements:

- Measure project progress toward its goals.
- Ask people how it's going and what obstacles they're encountering.

A standard way of measuring project progress would be through a schedule,<sup>7</sup> which I'll talk about later. There are also various ways of asking people how it's going. Regular team meetings are one mechanism; one-on-one discussions are another. You can gather more targeted data with surveys.

## **Step 2: Align on the plan.**

This is where you work through how to get there. To do it, you'll have to involve other people. In this section, I'll describe ProChain's Critical Chain approach. You and your island-mates will have to decide what makes the most sense for you.

### **2a: Create an organizing principle.**

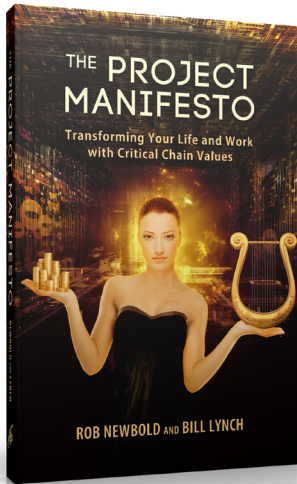
For purposes of this book, an *organizing principle* is a concise description of what it means to set priorities on your island. It's part of the basic framework that will help you target future actions and tools and reduce the chaos. The organizing principle I recommend you consider is:

**Create, maintain, and work to a project plan.**

A plan that helps set priorities will help team members feel empowered and focus on meeting or exceeding

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<sup>7</sup> In this document, I use "plan" to mean the things you expect to do in order to achieve the vision. The "schedule" is the part of a plan that contains dates and times.



the project’s goals—the vision. There are plenty of books and courses that describe how to create project plans and set priorities. We’ve written some of them (<https://www.prochain.com/about/prochain-press/>). Here are a few dos and don’ts of a good project plan:

- **Do** build and maintain it with your team. That way everyone is on the same page, and everyone has a stake in making it work.
- **Do** keep your plan credible, for example, in order to set priorities and to request senior management assistance in overcoming obstacles. If you have a conflict between credibility and what senior management wants, try to address it head on.<sup>8</sup>
- **Do** use enough detail to set priorities, but **don’t** overplan. If you get too far into the weeds, you may experience the “death of a thousand cuts” that causes people to eventually tire of maintaining plans. There are many mechanisms you can use to manage detail with minimal effort:
  - ▶ Put detail in checklists.
  - ▶ Create “rolling wave” plans, in which detail is added when it’s needed.
  - ▶ Use Agile and Kanban methods to allow people to manage their detail, while keeping the schedule at a higher level.

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<sup>8</sup> Of course, this may not be feasible. I discuss this situation in chapters 5 and 6.

The good news is, you don't need more detail than is required to create clear, stable priorities. There's even better news: the priorities don't have to be perfect to be far better than what people are using today.

- **Do** have very few endpoints, preferably one. For most projects, there is one primary deliverable.<sup>9</sup>
- **Do** put the plan in context of A<sup>5</sup>:
  - ▶ **Agree** on the project's objectives, and how you will know you've achieved them.
  - ▶ **Align** your team using your plan.
  - ▶ **Advance**—make progress, especially on the most critical tasks.
  - ▶ **Assess** how well it's working.
  - ▶ **Adapt** to changing circumstances.
- **Do** manage uncertainty explicitly. Everything is uncertain, and we often add time and money to our plans to account for it. But if you don't manage it, you will lose whatever you added.
- **Don't** rely on deadlines; let the vision drive the urgency.

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<sup>9</sup> This is definitely not true for all projects. For example, in pharmaceutical or medical device projects, there may be different requirements to get products approved and on the market in different countries. For very long projects, you may need to schedule intermediate deliverables in order to give senior management confidence that the project is on track.

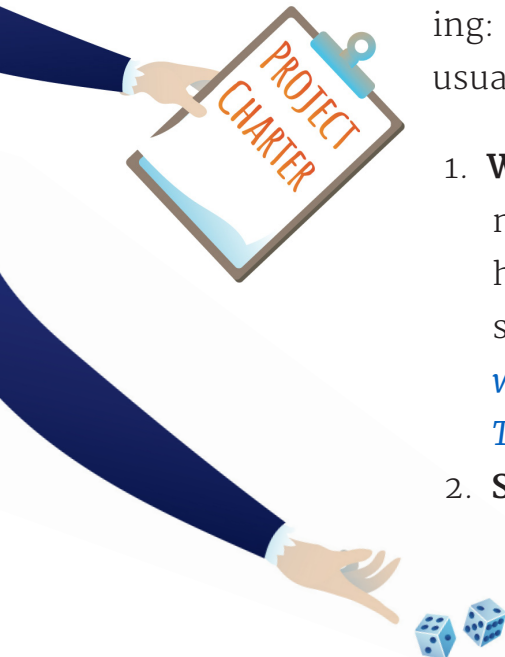
## 2b: Decide what tools you're going to use.



For the scheduling part of a project plan, I usually recommend Critical Chain scheduling. Coupled with appropriate software help, it's a great tool for creating and maintaining schedules that follow the dos and don'ts described in the previous section. There are many books, articles, and videos available on the subject; you can check our ProChain website (<https://www.prochain.com/resources/resource-center/>) for examples. The next section goes into some details.

## 2c: Create the plan.

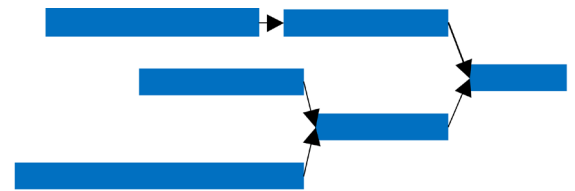
Here I'll present an outline of the steps you and your team can use to create a Critical Chain schedule. Warning: creating and maintaining a good project schedule usually requires software assistance.



1. **Write a project charter.** A project charter is a document that explains the Agreement among stakeholders regarding the project's goals. We have a sample on our website ([https://www.prochain.com/wp-content/uploads/2017/07/Project\\_Charter\\_Template.doc](https://www.prochain.com/wp-content/uploads/2017/07/Project_Charter_Template.doc)).
2. **Start a risk list.** Risks are uncertain events that, if they occur, can have a significant effect on the project, positive or negative. We most

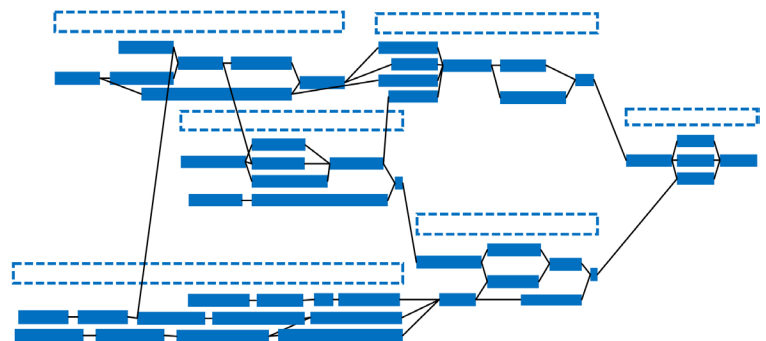
commonly encounter negative risks. You should identify risks that have a reasonable probability of occurring and a significant impact if they do occur. You don't need to manage minor risks; buffers, which I describe later, will take care of those. As part of your risk list, develop mitigation plans to lower the chance of the risk's occurring, and contingency plans to lower the impact if it does.

3. **Build a high-level plan.** This is a set of ten to twenty boxes or *high-level tasks*, all linked together. Each box should represent a chunk of work for the project. The links show how the work flows. Each box should have a name and approximate estimated duration. Together, the boxes should encompass all the work. You will probably want to build your high-level plan in a project scheduling tool like Microsoft Project. In this simple example, the boxes are connected with arrows; time goes left to right, showing the flow of work.



**HIGH LEVEL PLAN**

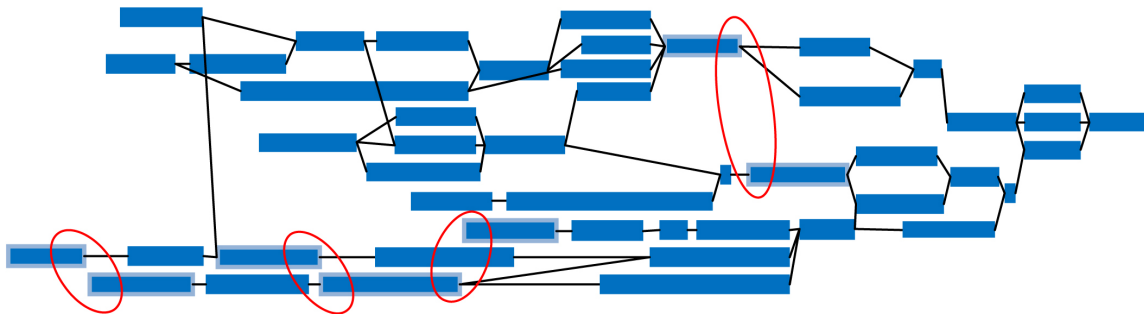
4. **Flesh out the detail,** assigning key resources to the tasks. Avoid adding too much detail, detail that doesn't contribute to helping people focus on the project's goals. You may



**DETAILED PLAN**

decide to include actions taken to avoid or mitigate risks. This picture shows the tasks as boxes and the linkages between tasks as lines. The high-level tasks now have dotted boundaries.

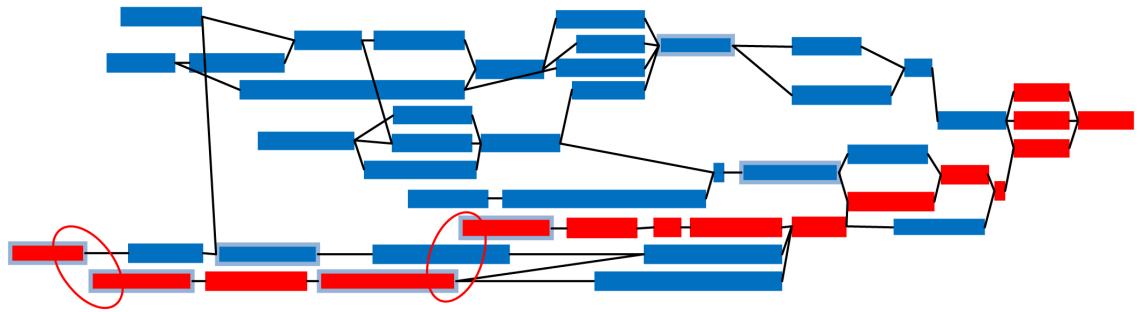
5. **Schedule the project**, figuring out where in time the different tasks could fall. Account for any resource limitations you have modeled. In this picture, tasks with limited resources have light blue borders. These tasks are separated in time so that their resources are not overloaded; this separation is called a *resource dependency*. The resource dependencies are marked with red ovals. Note that tasks in this picture are scheduled at late starts, to help clarify what is and isn't critical.



**SCHEDULED PLAN**

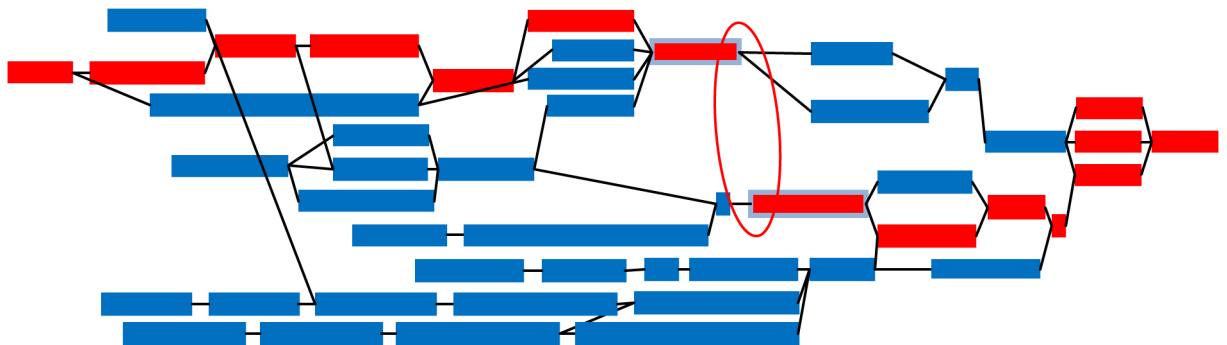
6. **Identify the Critical Chain**, shown here in red. These are the tasks for which any delay will push out project completion. The Critical Chain is the same as the critical path, but with resource limitations taken into account. In this example, you'll note resource



**CRITICAL CHAIN**

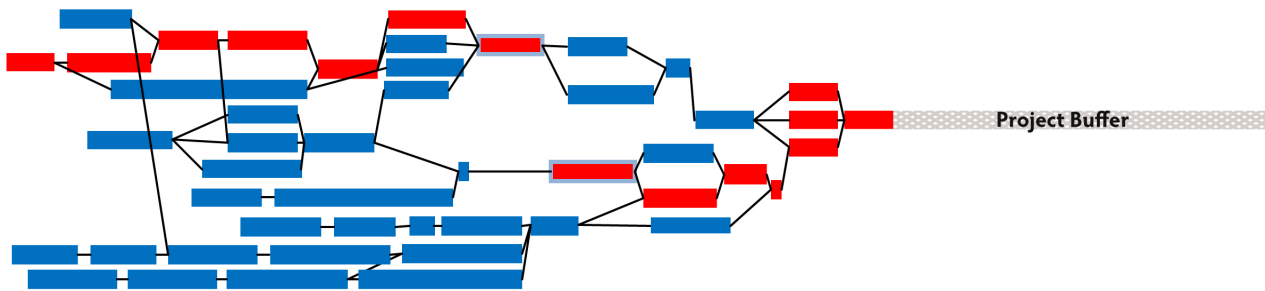
dependencies at the start and middle of the critical chain. The red ovals show how these tasks are staggered in time, so that their priorities—what the shared resource should work on first—are clear, and so that the schedule is realistic. Meanwhile, note that if you had additional resources only for the time the tasks are staggered, you could substantially speed up the project.

7. **Analyze and rethink the Critical Chain.** What is making the project as long as it is? You might be able to add resources, relax or eliminate linkages, or rethink the work so that tasks don't take as long. If

**ANALYZED SCHEDULE**

you have a credible schedule to start with, your project team can create a lot of value with this analysis.

8. **Create buffers.** With Critical Chain schedules, we eliminate task deadlines and, therefore, the need for individual tasks to have safety time. We take that time and aggregate it into *buffers* that allow us to manage and preserve the safety time. In an individual project, there are two main types of buffers. The *project buffer*,<sup>10</sup> shown here as a gray bar, is placed at the end of the project and protects the project delivery. The project commitment date falls at the end of the buffer, so we have to manage this time carefully in order not to waste it. Another type of buffer, the *feeding buffer*, protects the Critical Chain from non-Critical Chain tasks. Since there is rarely value in managing feeding buffers, ProChain schedules rarely include them explicitly. However, non-critical tasks



**BUFFERED SCHEDULE**

<sup>10</sup> The “project buffer” is similar to the concept of “schedule margin”; see also the paper “Protecting Earned Value Schedules with Schedule Margin” (<https://www.prochain.com/wp-content/uploads/2017/07/ProtectingEVSchedules.pdf>). Think of it as a kind of landing zone, a range of time within which the project is expected to finish.

should be scheduled earlier than their late starts, in order to protect the Critical Chain.

9. **Update and use the schedule.** People need to use the Critical Chain schedules to set priorities; that incentivizes them to keep their schedules up-to-date and credible. That has the added benefit of allowing ongoing analysis, as described in step 7 above.

Here are a few scheduling tips that we find useful:

- When you put a task name in a project schedule, create a sentence that has a clear verb and object. So, for example, “XYZ document” is not helpful; “Write XYZ document to operationalize quality metrics” is much better. The resources you plan to apply, if any, would become the subjects of the sentence.
- By the same token, avoid milestones. Milestones typically represent events, and in a schedule we’re most concerned with the work that causes the events.
- Use aggressive durations when you model tasks, with the understanding that people might not finish in that amount of time.<sup>11</sup> People on your island should work as quickly as possible, especially on Critical Chain tasks; but they also need to

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<sup>11</sup> Whenever there is uncertainty, it’s helpful to think in terms of ranges of time instead of the duration. For example, don’t think, “I must complete this task in three days,” but rather, “I will try to complete this task in two days, but it may take three.”



know that the buffer will help protect the delivery commitment in case something takes longer than planned.

- We prefer network (sometimes called “PERT”) views<sup>12</sup> to Gantt views<sup>13</sup> for building schedules of over 100 tasks, because it helps everyone see and understand the logic of the work flow. It’s helpful to print the network on a large plotter or display it on a very large screen.
- Keep the project charter up to date. If objectives, key assumptions, or dates change, capture that information.
- Avoid detail whenever you can. The primary purpose of the plan should be to help people set and work to priorities. The cost of maintaining detail can easily exceed the benefit of having it.



## 2d: Decide how to manage the boundaries.

People who aren’t on your island may sabotage it, whether intentionally or unintentionally. There will be erosion. For example, sometimes a storm surge from another project or from Finance will eat away at your resources and your stability. You will need to:

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<sup>12</sup> [https://en.wikipedia.org/wiki/Project\\_network](https://en.wikipedia.org/wiki/Project_network)

<sup>13</sup> [https://en.wikipedia.org/wiki/Gantt\\_chart](https://en.wikipedia.org/wiki/Gantt_chart)

- Learn how and when to say “no” or “not now.” This is hard to do, especially with your boss.<sup>14</sup> It requires communication and practice. It also helps a lot to have computer systems that show the impact of interruptions. The problem is that if you say “yes” to everyone, you will be back to chaos. Which, ironically, is equivalent to saying “no” to everyone. If everything is highest priority, everything takes longer than it should, and nothing is really “highest” priority.
- Communicate. Remember the organizing principle of the PM's island: **Create, maintain, and work to a project plan.** That implies you should **use your project plan to communicate.** For example, if an individual is working on something of high priority, like a Critical Chain task, he should tell people in order to minimize interruptions. If you need more resources, use the schedule to justify it. Here are some of the types of communication a Critical Chain schedule helps to enable.
  - ▶ With colleagues:
    - “I can't do that now and here's why.”
    - “I'm working on something critical; only disturb me if it's an emergency.”



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14 Saying “no” to your boss isn't as hard as it sounds, but it may require some creativity. For example: “So . . . is this really our top priority right now?”

- ▶ With management:
  - “If we do that, here’s what will happen.”
  - “Here’s what I need to get this result.”
- ▶ Whenever possible, dedicate time and/or resources to getting things finished in preference to getting things started.<sup>15</sup>

### **Step 3: Advance, Assess, and Adapt.**

Steps 1 and 2 mean nothing if you don’t make continual progress toward your vision: Team members feel empowered to focus on meeting or exceeding the project’s goals. In this section, I’ll talk about using your project plan and tools, over time, to help meet your project’s goals. For a more in-depth look at Advance, Assess, and Adapt, including a discussion of team meetings, please be sure to read chapter 7.

#### **3a. Advance to meet your goals.**

Your *plan* forms the basis for advancing in the A<sup>5</sup> system. It should include all the things you currently expect to do in order to achieve the vision, although probably not

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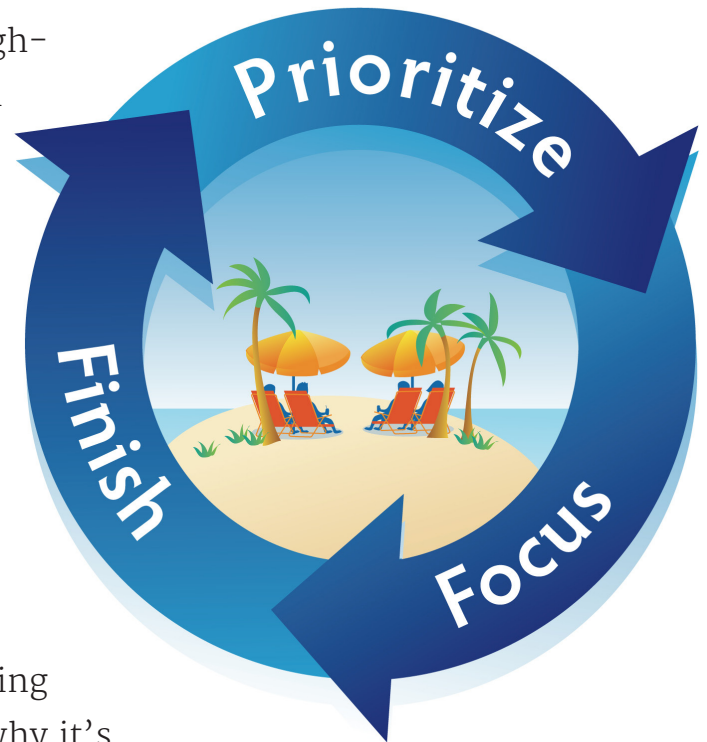
<sup>15</sup> This is discussed in detail in R. Newbold and W. Lynch, *The Project Manifesto* (ProChain Press, 2014), with the statement, “We value finishing over starting.” See also <https://www.prochain.com/about/prochain-press/the-project-manifesto/>.

in great detail. The plan may include the project charter, risk list, and schedule. The plan is a critical part of the process of managing a project. It is a great vehicle for communicating and managing project work and status. We work to the plan using a simple process: everyone should Prioritize, Focus, and Finish. Prioritize your work; focus on what's highest priority; and finish it.

**Prioritize** involves determining task priorities, based on your project schedule. This can be done through a tool like ProChain Enterprise,<sup>16</sup> or through reports generated by the PM. A team can do this on a weekly basis, at weekly meetings; an individual might do it daily, as you will see in chapter 4.

**Focus** means working on the highest priority tasks with minimal interruptions or switching. Complete focus might not be necessary on lower-priority tasks, but it is a good target.

**Finish** means getting tasks done and handing them off. The handoffs include updating the schedule, because plans need to keep up with reality. The more out of date a plan becomes, the more useless it becomes. Keeping it up to date takes work, which is why it's



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<sup>16</sup> <https://www.prochain.com/products/software/enterprise/>

so important to avoid unnecessary detail. There are a few ways to keep a plan up to date:

- Team members send task status to the PM, who enters the data into the schedule.
- Team members use a web-based tool, such as ProChain Enterprise, to update their own tasks. This has the advantage that they, and their managers, can see their priorities any time and any place.
- The team communicates regularly about the current schedule, as well as problems and needed changes. This can happen through email or team meetings, as discussed in chapter 7.

People should update their task status whenever they finish a task, and at least as often as the regular team meeting (typically weekly).

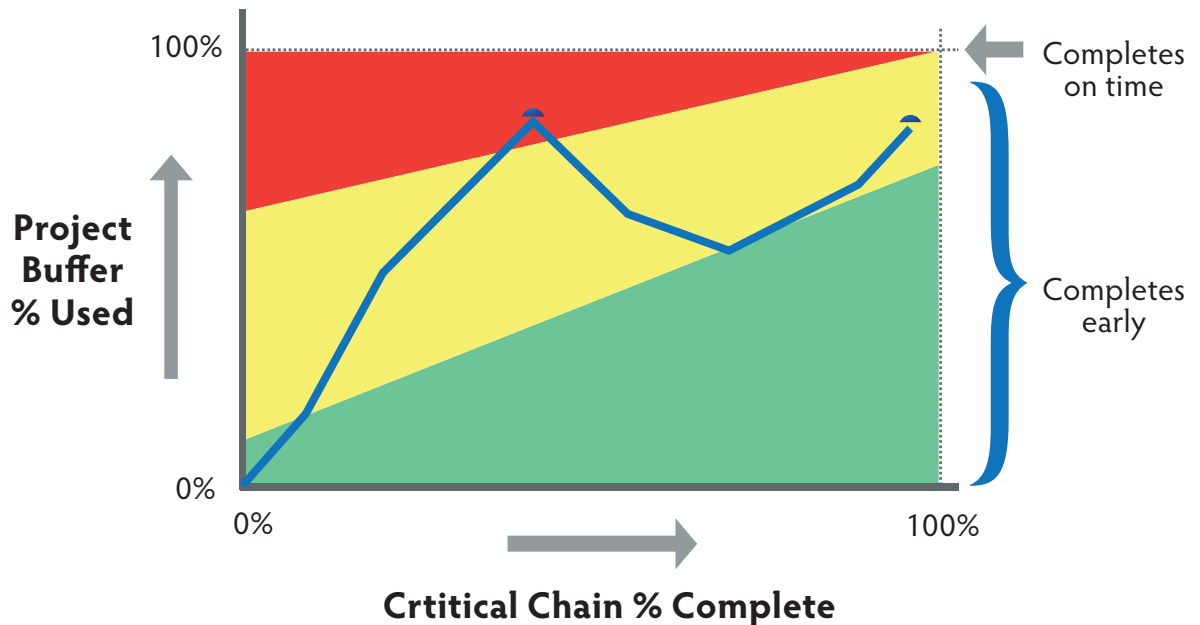
### 3b. Assess your situation

To be successful, you have to periodically take stock of where you are and adjust course. For a PM, a major part of assessment includes collecting the measurements from step 1d that define success: measuring project progress toward its goals and finding out from people how they're doing and what obstacles they're encountering.

A great tool for assessing project progress is the *fever chart*, based on the buffer concept described earlier. Here is a picture of a fever chart:







The horizontal dimension of this picture is the percentage of the Critical Chain that has been completed; in other words, how far we've gotten in finishing the project. The vertical dimension shows how much of the project buffer has been consumed by tasks that have taken longer than expected, unanticipated work, and so on. The commitment date is usually based on 100-percent buffer consumption, so completing the project with less than 100 percent of the buffer consumed means it's completed early. Early is good.

The colored regions indicate level of risk that the commitment date won't be met. Yellow implies that there's some risk and red implies real danger.

The fever chart shows current project status as well as trends. The inflection points can be labeled to indicate

why buffer was consumed (or regained) at a particular point. At each weekly team meeting, I recommend discussing the fever chart—why buffer consumption is what it is, and what you can do to decrease it.

The **risk list** is part of the project plan. The status of risks—probabilities, triggers, mitigation plans, contingency plans—should be reviewed regularly by the project team.

I recommend that regularly (at least monthly, to start), you include in your project team meeting a 30-minute *assessment session*. In that session, you can:

- **Review the project charter.** Are you accomplishing the project objectives? Does something need to change?
- **Evaluate execution performance.** Try filling out the Project Assessment Worksheet,<sup>17</sup> described in chapter 6, as a team. Talk about the answers and what you could do to improve.
- **Rate your team meetings.** Are they effective? Are they meeting expectations? Have everyone give a rating from 1 to 10 and discuss how to improve.

### 3c: Adapt to reality.

Of course, reality is change, so you'll need to be ready to Adapt. Many types of changes can affect projects,

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<sup>17</sup> Available at <https://www.prochain.com/downloads/A5-PAW.docx>.

including political, market, technical, and personnel. The starting point for adaptation is to assess regularly and pay attention to the results.

Sometimes changes require that you revisit the Align step and adjust the project plan. Sometimes changes are more significant, in which case you may need to re-Agree, maybe dramatically changing the nature of the project. You can keep people informed by making the appropriate changes to the project charter and the project schedule.

An important tool for accommodating and communicating change is the *Buffer Recovery Action Plan* (BRAP).<sup>18</sup> As obstacles slow down your project, or as your team gets ideas about how to speed up the project, you can put the ideas into the BRAP. From there, they may go into the project plan, or they may become independent actions for team members.

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<sup>18</sup> A sample BRAP spreadsheet is available at <https://www.prochain.com/downloads/A5-BRAP.xlsx>.

## LESSONS FROM CHAPTER 3

- From an organizational-chart perspective, first consider including people below you and immediately above you on your island.
- Follow the Agree, Align, Advance, Assess, and Adapt steps.
- Your priorities don't have to be perfect to significantly reduce the chaos.

### **What you can do right now:**

- Organize your team meetings to discuss:
  - ▶ Top priorities from last week and what got done. Did we make good progress on the highest priority work? Why or why not? This conversation should be forward-looking; the purpose is not to punish people, but to improve.
  - ▶ Top priorities for the upcoming week and who is assigned to them. Better to use the team's intuition to set priorities than to work with no priorities.
  - ▶ How to protect people's time and quickly get to "done" on the things we think are

most critical. In the end, it's not about starting, it's about finishing. How do we avoid delays? How do we accelerate completions?

- Agree on a project charter. Maybe you have this already. Is it up to date? Do team members understand what's in it?
- Create and discuss a high-level plan. Where is your project today, in the overall scheme of things?