

A Genie in a Bottle  
The Three Wishes in Project Management  
By Rob Zanfardino

A project manager was walking along a beach just around sunset when the sky was ablaze with all the glowing red and yellow hues that one can only imagine when he stumbles on this beautiful porcelain vase. While looking at it he notices an inscription. Rubbing off the dirt to read the inscription better a puff of blue-black smoke comes out of the bottle and before him appears a Genie. "He who holds the bottle and rubs it is entitled to three wishes". The project manager somewhat shaken realizes what he has before him, takes a moment to ponder his new found wealth and said to the Genie, "I love taking long walks by the ocean and I would really enjoy walking on the beaches of Hawaii, but I do not like to fly. For my first wish, I want you to build a roadway so I can drive to Hawaii anytime I feel like it". The Genie thinks this wish over for a moment and says, "Of the thousand years that I have been in this bottle this is the first time that I cannot fulfill a wish. You must pick another one that I can grant you". The project manager thinks for a moment and responds to the Genie, "Well then, I have a software project that I have been spending weeks trying to develop user requirements for but the business stakeholders cannot come to any decision as to what they want. "I wish that you can help me build strong relationships with the stakeholders to make my life easier. I want you to make them decide by tomorrow all the business requirements that they want to ensure that I do not have any scope creep and I get the project done on time and on budget. For my final wish I want you to ensure that the project will be a success". The Genie puts one hand to his chin and the other hand pushes the turban back off of his forehead and responds to the project manager, "Would you like a two lane highway or four".

Let us focus on the "3R's" of project management for a moment: **Relationships**, **Requirements**, and **Results**. I have placed them in the order of importance as they pertain to the project life cycle. You will not, I repeat will not have a successful results on a project if relationships and requirements are not developed fully. If you do not build relationships with all parties from the get go you will lose your primary control of the project. Control is a vital part of the project manager's skill base. Keep in mind that in a matrix driven world of ours most likely you do not own a resource therefore you have to get all parties to work for you. You do that by being a professional, the one resource that people can depend on for being organized, accurate and up to date on all the issues.

A famous rock star was once quoted in saying “Of all the things I lost, I miss my mind the most”. This quote will become very real to you as a new project manager especially when you are trying to drive requirements out, and the business side does not know what they want, or they do not know when to cut it off, all of their wants. Another important function that you will play in this position is that of a relationship manager. You must be able to demonstrate to the business side your expertise in understanding the importance of version control. Far too often the business side tries to cram too much into a software project slowing down the whole process. It is very important for you and your team to recognize when you can split up a project so that you can begin work on the first phase and pushing work into other related phases. Your primary role as the project manager is to push the work forward and manage to milestone dates. You are the guy/gal in the middle who must get all sides to agree what the game plan is going to be and you must be the one to set the play into motion. I also feel that it is important to discuss the difference between the project manager and the development manager or development lead. I feel that there is a vital difference and job function that most companies are failing to take advantage of and are trying to smash too many positions into one. The project manager should be tasked with monitoring tasks and managing them to the milestones dates and the opposite for the development manager. By doing this, you allow the project manager to manage up to 5-6 software projects instead of one or two. In the best of all worlds two projects would be in the sizing phase, two in development, and two in testing/production.

One company I worked for my development team was located a thousand miles away from me. It was very important to visit them to maintain my relationship on a one to one basis. When I first visited my development team I would pay particular attention to how each of them would decorate their office cubes. I found out very quickly what they liked or disliked even their religious affiliations. I tried to understand what was happening on the home front and how it may be affecting them on the job. I say this with all sincerity I was not trying to use this information to “brown nose” or con them to liking me. On the contrary, because I was a thousand miles away I had to learn what they liked and disliked in order not to offend them by saying something that may hurt their feelings. In fact, I developed such a close relationship with these folks I began to know more about them than my management team who were located in the same building. Refer to [The Black Pen Concept ©](#) that I wrote a few months ago for PMFORUM. Building relationships will be primary to your success.

The relationship role is one of the most vital aspects to this position. As reported in the Poughkeepsie Journal (Poughkeepsie NY) on September 26, 2005, a recent survey done by DHL focused on one of the biggest customer irritations which was (28% of the 1000 polled) a lack of interaction with another human,

followed by (21%) being stuck on automated phone system. From the moment we extend our hands to shake (used in the medieval times to show that we are not bearing weapons) the skill of relationship building begins and must be the corner stone of your project.

Another point I like to bring up is the project manager must establish themselves very quickly as the internal consultant of the project. Since he/she in many instances do not have any direct reports they must be the individual who can separate the tree from the forest and guide all sides and assist them when the project bogs down. All too often they look at the project manager as another technical resource or as another business analyst and at times they may indeed have to participate in those roles. But here is where the project manager and the "3R's" have the greatest impact. If you can establish yourself as a consultant claiming you are neither the most technical or the most business savvy but you have enough knowledge to be the glue that binds all the different pieces, you will have more effect on the project outcome than you can imagine.

Once you have established relationships and control you have to drive the requirements out of the business stakeholder. Here is another area where project managers falter. You need to be asking from your tech team what they need to support the business side. Far too often in our zeal to provide service to the business side we forget that our tech teams are just as much a customer as the end user themselves. You have to keep in mind as the project manager to maintain your distance from all parties as not to show any favoritism to the business side or IT/IS side. This is very hard to do without appearing aloof to any one side but it must be done. This will become more apparent to you when you have to deal with conflicts during the project cycle. Another point we should discuss is far too often we in IT/IS forget that we are here to serve and support the business side. We are not the business, we serve at their pleasure so it is important we keep that in mind.

At this point I feel it is very important to discuss the role of the project manager and the customer. First, you need to understand there is more than one level of customers. In most organizations there can be up to 7 levels of customers you need to deal with and each requiring their own needs. For example, not only is the project sponsor, business stakeholders and the end customer who may receive the new application, but you as the project manager must come to realize your techies and your management chain you report to, will probably require some goods or services from you as a natural outcrop of the project. You must be aware and sensitive to the fact that they too are your customers.

We have all experienced a slow start on some projects and some of the times you may feel they will never get off the ground but until you get enough of them

under your belt you have to go through some pain to develop the rhythm of the project cycle. The one area I see time and time again derail a project is the planning phase of the project. As I mentioned in other articles that I have written, it is my firm belief we are not spending enough time in this phase for various reasons: If you are an outsourced company many times the account team creates the Statement of Works with no input from the project side. If you are an internal project group many times you have so many projects cued for sizing that once a business stakeholder gets a hold of you they will never let you go.

So how do organizations try to solve some of these problems, first and foremost I recommend that organizations do some planning in the prior year. What I mean is from September through December this is the time that organizations should be planning for the next year's projects (Fall Planning is a term most commonly used in the United States). The first step especially if we are talking about software initiatives is to drive the priority process for the business community. Senior Project and or Program Managers must organize a list of projects for the various business owners pulling together all of the Wish Lists that were thrown at the IT/IS teams throughout the year and at a very high level size each project for the number of man hours the project will take. My next suggestion is to have the Senior Project or Program manager run a series of meetings with the key business stakeholders to discuss each project, the number of estimated man hours to complete the project, and its impact to the business. I recommend a chart something like this:

Project ID #	Project Name	Description	Estimated Level of Effort(Hours)	Estimated Cost(\$)	Impact if not done
001	Bingo	Bill Codes	1000	100,000.00	Critical
002	Zingo	Commissions	950	95,000.00	Critical
003	Red Bird	Employee Survey	780	58,000.00	Critical
004	Alpha	Purchasing Codes	250	16,250.00	Critical

Remember it is your function not to pick the projects but to help the business side decide which ones will give them the best bang for the buck. It is difficult at times for the IT/IS not to be constantly caught up in always trying to work with the latest and greatest hardware and software. Many times our biggest value add to the business are the improvement of the business processes themselves. My experiences are that the IT/IS side tend to know the business rules better than the business side and for good reasons. They have to know how the business rules effect the applications. It is also imperative we let the business pick their projects. Another suggestion is once you have laid out all the projects which need to be completed you let the business side go off behind closed doors among themselves to decide which project they want to go forth with. I am referring to the ugly word called "politics" which can kill almost anything that at

first seems like a good idea. With limited IT/IS dollars it is imperative the business side negotiate with each other what project will go forward prior to the new year and eliminate the land mines that one organization can place on the development road for the other side to step on. Once the business owners agree which projects they want to be advocates for you can go to the next phase of the process which is to get executive blessing.

Once Senior Management agreement is obtained, you have taken the first step to reducing a long drawn out sizing phase. Keep in mind you have only so many developers and so many man hours so it is critical everyone understands how many man hours you have to spend. Make sure the business side understands that you cannot be wasting time spending hours in meetings to drive out requirements. What I also find very interesting is the large amount of companies who do not bill the business side for the IT/IS project time. The fastest way that I have ever seen to eliminate the prolong agony of the sizing phase or for that matter the entire project is to have corporations have a fixed amount of dollars for the IT/IS projects, divide it up for all departments to have a piece of the pie and tell them that's all they get. You will be surprised how fast the games end when the departments know that they are getting charged for every hour.

We tackled **Relationships** and **Requirements** and need to focus on the third "R", project **Results**. In many ways the project manager can influence the results of the project more than the techies or the business stakeholders. Like the Genie in the bottle, the project manager has the ability to grant wishes after the Statement of Work and the Requirement Definitions documents have been agreed to and signed. There will be times the project manager can grant wishes that can come up unexpectedly without always counting the pennies or causing the business stakeholder to submit a new Project Change Request.

I know what you are about to say, "Rob the role of the project manager is to control costs and the calendar to deliver the project". You would be absolutely right with that remark. But you need to go back to the first "R" in this article which is relationship building. You will be able to knock down more walls and move more mountains when you develop and receive mutual respect from all the team members. But you can only do this in small increments and it does not happen overnight. Sometimes you have to make it painful for the business side not to sneak things in and increase scope creep. As they say on the streets of New York City to be "nickel and dimed to death" and at times you may have to look away but you can also pick the battles you want to wage. Remember you are not giving up control you are in fact controlling the flow of the project by directing the path that the project is flowing to. It takes time to develop this skill and for most, you have to go through several projects to get it right. But do not let this deter you. Any project manager who says they have nothing left to learn should be

taken out of the position. Each project is different and unique and you should never go into any of them with a cookie cutter approach.

Having the power to grant or not grant wishes is one power, but an even bigger one is to ensure the requirements, risks, costs, etc are well thought out and planned. Over the years most problems with projects are caused not by a lack of skill but for a lack of planning. I recall in one of my former companies a manager of mine always ensured we would have a 2 o'clock coffee break. At first I thought it was just a way to chit chat, but over time I realized that my manager was using a very informal approach to have a very detailed strategy meeting without being so formal. The amount of items we discussed and our abilities to anticipate and have a plan in place always had us ready to go into action. We came up with a little joke between ourselves....While most departments reverted to the carpet bombing approach (a phrase used to explain how a hundred bombers would blanket a battle field with bombs, blowing up anything that happens to lie underneath them), to a much more strategic strike whereby one bomb or one action placed exactly on the target could accomplish the same results with less destruction.

Again, this is another example of how important relationships are in the business world and how we all could be doing more to invest in this area. When you are able to look into another person eyes and within a split moment determine if the person has integrity, this will anchor any relationship. I learned this lesson from of all places a sales trainer. Jonathan Evetts was an individual who brought me under his wings when I started my own consulting business 10 plus years ago. Having just left IBM, I realized that although my skill base was very good it was very vertical in nature and I needed to have more horizontal skills in business. One area that I was lacking was in the area of sales. Jonathan who was a sales professional by training took me under his wing and taught me a thing or two about sales. By far one of the best lessons learned was that you will sell far more when people feel and know that you have integrity than anything else. It is no different in a project. You must be known for your integrity because once you lose it, it will be almost impossible to get it back.

Integrity has many forms and shapes and can be easily corrupted. As the project manager you must fight back corruption in the process. It can be as simple as ensuring that all billable times by the project team accurately reflect the "real hours" to routing out corruption in the process. One of the biggest areas where corruption of the process can take place is ensuring the account team stays on their side of the fence and the project team stays on their side of the fence. I recall a situation that was told to me about an engagement that was being done at one of the major financial institutions. An outsource infrastructure company was hired to complete a migration. Due to a lack of internal skills they hired a

contracted project manager to perform the work. This contracted project manager was a bit of a cowboy who liked to circumvent the internal procedures that was set up to stop abuse and corruption. This "Outside" project manager quickly learned he could turn the account team against the project team and was able to manipulate the control of the project away from the project side and had him report to the sales team manager. This was a major blow to internal controls. It is a major blow because the two sides can be in direct conflict with each by the nature of their work. The account team is charged to make sales, the project team is charged to deliver the goods and services. The project team by its charter has to work within fair and reasonable project methodologies: i.e. ensure that the billable hours are real maintaining the integrity of the project scope, etc. Let's be honest with each other the role of all corporations is to make money, but unlike Enron, MCI and Tyco there has to be limits and controls and the project manager by his/her training is best suited to ensure that those controls are in place and followed. Human nature is such that given an inch we will take a yard. A strong project manager should have the ability to ensure the project runs on the straight and narrow. It is all about ownership. The project manager must put his/her name on the project and declare to the world that I will take responsibility for all actions and outcomes of the project.

Like a Genie in a bottle, a project manager has three things that they wish for to have a completed and successful project. If you can create sincere **relationships** based on trust and integrity you will find the **requirement** phase will be one of mutual respect for all the parties. In the end the **results** of the project will consist of milestones being completed, on time and on budget and the product or service will be delivered to the complete satisfaction of the customer and your project team.