

Chapter One: Introduction to the Book

Thank you for investing in this book. We trust you will find significant value here. Both authors have written extensively on project planning and project management. (See the “About the Authors” section.) But this Book is different from our earlier works in several ways.

We come from the two ends of the PM (project management) spectrum. Dana is one of the most prominent authors in the world of professional project management at the enterprise level. He manages projects for large corporations, nation-wide organizations, and generally “big” clients.

Karl has spent twenty years managing projects in the small business space. Where Dana dealt with massive projects with hundreds of personnel that lasted months or years, Karl’s experience has been with projects that have a handful of personnel and last days or weeks. On rare occasions, months.

When we first met, project management was the most obvious topic we had in common. And almost immediately we conceived the idea for this book. Now less than two years later, here it is.

We see a need for more “professional” management at the small end of the PM spectrum. And, as it turns out, there are just a few

things that need to be done to guarantee the success of smaller projects.

Note: Absolutely nothing derogatory or negative is implied by the use of the term “small.” To small and medium business (SMB) clients, a project is just as important as it would be for an enterprise client. The absolute dollar amounts are lower, but the relative costs are the same. In addition, business disruptions are just as important, as are positive outcomes.

So this book is focused entirely on the SMB (small and medium business) market. It is also focused entirely on technical or “information technology” projects. While it might be very useful for other projects in the SMB space, all of our examples are from technical projects. Finally, this guide is extremely practical. As with all of the books in the Great Little Book catalog, our focus will be on a down-and-dirty, get-it-done approach. If you want the history and philosophy of project management, Dana has other books for you.

Our primary audience is the technical consultant. Our secondary audience is the in-house information technology manager. If you are in another role and find this material helpful, please drop us a line and let us know that.

The Approach of This Book

For purposes of this book, you can consider a project to be any undertaking that requires more than **two steps** that can't be completed at the same time.

So, for example, changing your password is not a project. But installing a new server is a project (discovery of old network, building of new server, install virus scanner, install backup software, etc.).

There are also small projects and large projects. You will occasionally have “macro” projects, which are really big containers with smaller projects inside. Please note that you don’t need a project binder for every project. But as the complexity of a project increases, the need to keep track of it also increases.

In this book we provide a project planning and management process that is easy to learn and easy to teach to your assistants, fellow technicians, and sub-contractors. We address all the key weaknesses of project management and provide a process so that no work goes un-done, the project is completed within budget, and the project timing is tamed.

That means you have checklists. When everything’s checked off, everything’s done. It also means there’s a built-in process for spin-off work that comes up as a result of the project. When some piece can’t be completed as planned, it goes into the “additional work” section.

All of which leads to . . .

Each project has a **scope of work**. Everything inside the scope of work is part of this project. Add-ons and spin-offs are outside the scope, and therefore outside the project. They get written down, additional service tickets are created, and nothing gets dropped or forgotten.

As a result, your projects are successful and profitable. We know that because, by design, there's a scope of work and an allocation of resources (primarily labor). When you complete the scope of work, you complete the project.

You also avoid "scope creep" – adding chores to this project. Very often scope creep is simply additional work for no additional money. With this process, all that additional work becomes service tickets that are billable on another day!

The Project Binder

One of the key elements to success with projects, as we provide them here, is the Project Binder. The binder is important to your success because it's the ultimate random-access guide to your project. You can flip it open and find out where you are in the project, the next action step, how many stages there are, and all the documentation you'll need at the end.

We'll get back to the binder discussion in much more detail. For now, here's the view from 30,000 feet.

The Project Binder consists of a series of forms. They are designed to elicit a lot of the details you'll need as you work through the project. The great thing about a standard set of forms is that you don't forget to ask any of the key questions, and you don't skip any steps.

The Project Binder started out as a "generic project" we could use for a variety of jobs. After all, project management consists, in large part, of approaching each unique job in a consistent manner that could, theoretically, be reproduced for the next client.

One- and two-person companies don't have much problem with projects as long as one or both parties keep themselves involved and informed. But, when a consulting company begins to grow, they face an important challenge that must be addressed: How do you keep a project moving in the right direction, and profitable, when you have to coordinate it between several people?

The answer is: You need a tool that provides a way for everyone to come up to speed – quickly – on your project. Once you have that ability, you can have several people work on a project and keep it all moving in the right direction.

Now we're going to take a look at project management from two perspectives. Chapter Two introduces "professional" project management that leads to certifications and, potentially, the road to a career in PM.

Chapter Three addresses project management in the SMB (small and medium business) space. SMB project management is not "different" or wrong in light of professional project management. As we'll see, it is simply less complicated. But you still need to make money, stay on schedule, and attain the goals of the project!



Key to Your Success

This is the 21st Century: We assume that you are using a modern PSA or Professional Services Administration tool. It might be ConnectWise, Autotask, TigerPaw, or something else.

No matter how you do it, we'll assume that you use Service Requests or Service Tickets to keep track of jobs. You could use an Excel spreadsheet, if it works for you. But you need to use something.

No matter what you use, we assume you use it religiously. That means that everything gets entered into the PSA. Everything gets written down. You want to make more money in your business? That's easy: Keep better track of all the work you do.

Anyway, throughout this document you'll see references to *Service Requests* and *Service Tickets*. These are interchangeable. But they're not optional. 😊

See www.ConnectWise.com, www.Autotask.com, or www.TigerPawSoftware.com.

Your To-Do List for The Chapter

_____ Browse through the rest of this book.

_____ Find a PSA (professional services automation tool) or two. Pick one and begin working with it.

_____ Find at least one binder so you can start building your binder when the time comes.

_____ Download the content that accompanies this book. See the instructions at the front of the book.

Notes:
