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"STRATEGIC PROJECT MANAGEMENT MADE SIMPLE" DE TERRY SCHMIDT

RESUMEN

Terry Schmidt is a certified project management professional (PMP) with 30-plus years of experience. He teaches project management at UCLA and the University of Wisconsin. He has built a methodology to design and manage projects so as to provide real strategic value to your company.

His basic tool is called the Logframe – the logical framework.

1. The Logical Framework

The logical framework was initially developed to help the U.S. Agency for International Development plan and implement its multibillion dollar foreign aid programs, but it can be used effectively on all types of projects – large and small, simple and complex – in all types of businesses and organizations, as well as in personal growth efforts. The tool is valuable not only to design and manage projects, but also to bridge the gap between strategy and projects.

Four strategic questions form the heart of strategic project management:

1. What are we trying to achieve and why?
2. How will we measure success?
3. What other conditions must exist?
4. How do we get there?

The log-frame structure captures in an organized way the answers to those four strategic questions.
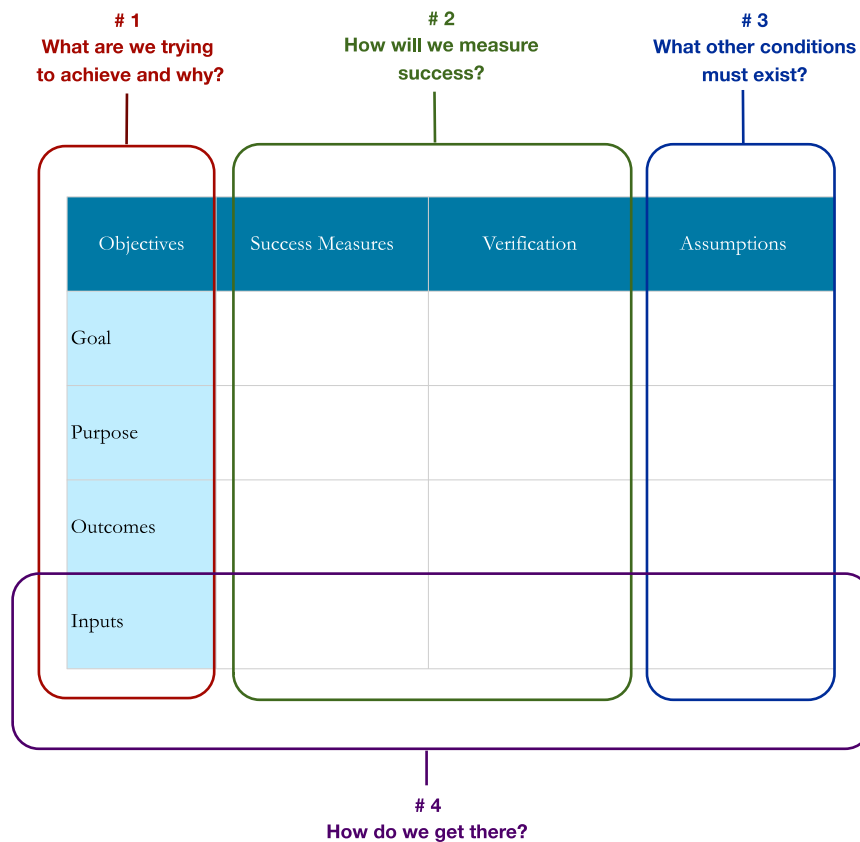
1.1 The logical relationships embedded in the Log-frame

The Log-frame embeds three different logical relationships:

Vertical logic: Planning is nothing more than imagining some future desired conditions, and then thinking backwards about the cause and effects needed to get there. The "If-Then" logic is captured in the vertical axe of the Log-frame: in properly constructed Log-frames, for any objective, looking up the vertical axe should answer the question "Why?" while looking down answers the question "How?" It is not about sequential logic, A must come before B, it is about causal logic, A causes B to happen.

The **horizontal logic** fleshes out objectives at each level using measures and verifications. Typical means of verification include physical observations, project team meetings, reports, surveys results, analysis, tests or whatever else confirms that the measure has been met.

The **zizag logic** pulls in assumptions so we can eliminate problems in advance and completes the Implementation Equation:

> If Inputs + valid Assumptions, Then Outcome
> If Outcome + valid Assumptions, Then Purpose
> If Purpose + valid Assumptions, Then Goal.

1.2 The elements of the Log-frame

Objectives

The answer to the first question "What are we trying to accomplish and why?" produces a list of possible objectives. Your team then needs to convert those crumbled objectives into a list organized into those you can make happen (Inputs and Outcomes) and those you cannot (Purpose and Goal):

- Goals: The high level, big picture strategic or program Objective to which the project contributes.
- Purpose: The impact we anticipate from the project, the change expected from doing the project.
- Outcomes: The specific results that the project team must deliver, can control, make happen and be held accountable for. They can be functioning systems or processes or completed end products and delivered services. Try to describe outcomes as they will exist on the day they are completed, using the past tense (example: people trained).
- Inputs: The activities and resources necessary to produce Outcomes.

Good project management requires a single goal and a single purpose, along with multiple outcomes. Each Outcome can have several Inputs.

Example:

Goal: improve corporate productivity.
Purpose: Have staff use standard procedures.
Outcome: develop and publish best-practice procedures.

Inputs: Identify ineffective practices.

Measures

Project measures describe project success. Selling target measures is often done by negotiating with stakeholders on what is realistic, doable and warranted.

Measures should be valid, verifiable (clear and non subjective), targeted (include quantity, quality and time) and independent (each level in the hierarchy has its own measures).

The nature of measures varies at each level:

- Goal measures include the long-term impact of one or multiple projects.
- Purpose measures describe conditions that will exist.
- Outcome measures describe project completion. Think of Outcome as project scope and Measures as performance specifications which spell out what the completed deliverables will look like.
- Inputs measures deal with activity, budget and schedule. Limit activities to 4 to 7 for each Outcome and group then in chunks. The Log-frame Inputs are meant to offer a high level summary, not a comprehensive action plan. Gantt charts and Work Breakdown Structures (WBS) should complement the Inputs. Clarify responsibilities using a responsibility chart. For each task, there should be only one person responsible to do, and then people falling into the following categories: participates, may be consulted, must be informed or approves.

Verification

Typical means of verification include physical observations, project team meetings, reports, survey results, analysis, tests or whatever confirms that the measures have been met.

Look first for existing and easy to use methods, and then supplement as needed. Collect not only data that show progress, but also offers clues that warn you when you are off-track. When direct measures are too difficult, expensive or reliable, choose a proxy measure.

Assumptions

Every project rests on assumptions, whether or not they are acknowledged or verified. The very best project leaders take the time to identify, examine and validate what they implicitly assume.

Ask yourself what must we assume and what are we assuming in categories such as project team members, stakeholders interests, technical issues, management support, resources availability, related projects, supplier issues, customer expectations, political climate and external factors.

Assumptions should be specific, expressed as positive conditions and they should be rated to assess their probability and their impact on the project.

Assumptions should always be monitored. In some cases, they may be under the control of someone else and may be influenced or brought into the project as an objective.

2. The Log-frame in practice. Managing people dynamics

Understanding people´s interests, nurturing relationships and building a supportive coalition is as crucial as managing tasks, budget and schedule. Use a stakeholder analysis matrix with interests, degree of support needed and predicted support for each stakeholder and identify the gaps.

As for the core team, the ideal number is between 5 and 7. Getting the group to create shared norms at the beginning of the project is a great way to enhance professional respect and promote *esprit de corps*. Once the team has come together and has been adequately informed of the parameters of their mission, have them prepare a Log-frame of the larger project system, broader than your project and then a Log-frame for your project.

Start answering the 4 questions:

1. Make a list of objectives. Classify them into categories and check for "If-Then" logic.
2. Establish measures for each objective and verification means. Discussing measures and verification may lead to moving or rephrasing objectives.
3. Identify key assumptions for each level. Analyze how important and probable is each assumption and what are the options to deal with each.
4. Define the inputs at high level. Chunk activities for each outcome, identify task sequences, develop a Gantt chart. Identify resources needed for each task and clarify responsibilities using a responsibility chart. It is recommend that you plan the upcoming phase at the level of detail you need to manage it effectively and simultaneously create less detailed preliminary plans for subsequent phases.

Build feedback loops and milestones into your project plans. There are three types of assessment:

- Project monitoring: tracking budget and schedule against deliverables and making tactical adjustments. For a 1 month project, set 1 to 2 milestones per week, for a 6 month project, 12 to 15 is fine. For longer projects, avoid going more than 3 weeks between milestones.

- Project review: reassess project design, with emphasis on the outcome to purpose link. It is about looking at the status of assumptions and stakeholder support.

- Project evaluation: Takes place after the project is completed and focuses on purpose to goal linkages. The first place to look for failures is assumptions. Include project evaluation as a milestone into the Log-frame.

For case studies of Log-frames applied to specific projects, visit: www.ManagementPro.com.