Preface

Project initiation is the process of formally conceiving, approving, and launching a new project. You don't really have a project until the appropriate stakeholders have approved it during initiation. The time and thought invested during initiation lays the groundwork for all the project work that follows.

All project managers know of certain steps to take at the beginning of a project. They need to develop a business case, write a project charter, obtain sponsorship and funding, assign a project manager, assemble the team, acquire other resources, and develop a project plan. I'm so confident that you already know about these essentials that, with the exception of developing a project charter, I don't address them in this book.

However, numerous other activities are also vital to getting a project off to a good start. Unfortunately, project managers sometimes gloss over these steps. Perhaps they haven't had enough experience to realize how important these steps are. Or maybe they don't feel they can spend the time during the frenzy of project launch. But seasoned managers know that attending to these critical activities can separate success from failure.

This book describes many actions that lay the foundation for a successful project, actions to take during project initiation. Most of the chapters are based on articles I have published previously on various aspects of project management, although several new chapters are included as well. Both experienced and novice project managers will find the practices described here to be valuable. The focus is on software projects that are following any life cycle or methodology (including agile), but the practices apply just as well to nonsoftware projects. As with all process-related guidance, each project team needs to adapt my recommendations to the nature and size of their project. Nonetheless, I believe that *every* software project will benefit from thoughtfully applying the project initiation practices described here.

The book contains 15 chapters grouped into five parts. Part I, "Project Management Funda-mentals," contains two chapters that describe some basic concepts and practices of project management in general. Some of these apply just to the project initiation phase, whereas others are applicable throughout the project's duration. A third chapter presents a method and a spreadsheet tool for prioritizing projects in your backlog of requests. There's no point in initi-ating a project unless you're confident the organization is spending its money on the right project.

The five chapters in Part II, "Preparing for Success," present concrete guidance on how to per-form some of the most important activities that will increase the chance of a happy outcome. Three chapters address identifying project stakeholders and their success criteria, determin-ing product release criteria, and identifying and planning to control project risks. Chapter 7 describes the project charter, a key initiation deliverable that makes sure the stakeholders share a common understanding of where the project is headed. Another aspect of software

project initiation is to establish the necessary tool infrastructure for your team. Therefore, Chapter 8 presents several lessons I've learned from tool adoption in various organizations.

Project managers always hope for the best, but they should also plan for reality. Part III, "Living with Reality," describes several ways to incorporate a heavy dose of reality into the project, beginning during initiation. Chapter 9 addresses the need for all project participants to negotiate realistically achievable commitments. Chapter 10 describes how to incorporate contingency buffers into project schedules to account for the inevitable surprises, underestimates, and risks that materialize. Finally, Chapter 11 presents the Wideband Delphi group estimation technique, which can yield more accurate estimates than any one individual will generate.

I began my career as a research chemist. As a scientist, I appreciated the importance of data and the insights data can provide. Since I moved into the software domain decades ago I've extended this interest into measuring various aspects of software development activities. Project initiation is the right time to determine what metrics your team needs to provide adequate visibility into progress. It's also the right time to begin growing a measurement culture in your team. The two chapters in Part IV, "Measuring What Happens," address the important topic of software metrics. Chapter 12 presents a concise primer on the concepts and practice of software measurement. Chapter 13 warns about 10 traps that can inhibit the success of measurement programs.

Project initiation is an excellent time to study the lessons garnered from previous projects. Chapter 14 in Part V, "Learning Continuously," suggests ways to establish and use a lessons-learned repository. It also stresses the importance of thoughtfully selecting industry best practices to apply and worst practices to avoid.

When a project team delivers its product the team members experience a range of emotions. They're relieved to be done, they're proud of the achievement, they're tired, and they're ready to move on to a new and interesting activity. But before they move on, the wise project manager will take the time to harvest knowledge from the project that can benefit future work. Therefore, the book concludes with a chapter on how to perform project retrospectives, which are the principal source of those lessons the project manager needs to study during project initiation.

Each chapter begins with a short scenario, typically describing an actual project experience I've had that conveyed a significant message. The scenarios illustrate problems that can arise if a project manager neglects that chapter's principles and practices. A speech balloon icon in the margin highlights other true stories from real projects that support the points made in the chapter. The chapter then presents a tutorial that will let you put the chapter's topics into action. Common project initiation traps to avoid are flagged with an icon of a maze in the margin.

Every chapter ends with several practice activities. Worksheets are included so you can begin to apply the chapter's suggestions to your own project immediately. In addition, the book is

accompanied by a number of procedure descriptions, templates, spreadsheet tools, and the like. You may download these process assets from the companion Web site for this book: www.microsoft.com/mspress/companion/9780735625211. (To take advantage of these tools, you will need to be running Word, Excel, and Adobe Acrobat.) The worksheets from the end of each chapter are also available at that Web site so that you can make additional copies for use on other projects.

In my view, there is really no such thing as project management. What we call "project management" is a composite of managing many other project elements: people, requirements, commitments, resources, change, risks, opportunities, expectations, technology, suppliers, and conflicts. Nearly every project includes these elements and the successful project manager must keep an eye on them all. Use the guidance provided in this book to help you launch your next project on a solid foundation.

Acknowledgments