



## **TenStep Project Management Process™ Summary**

Project management refers to the definition and planning, and then the subsequent management, control, and conclusion of a project. It is important to recognize that all projects need some level of project management. The larger and more complex the project, the more there is a need for a formal, standard, structured process. Smaller projects still need a structured process, but it does not need to be as elaborate or as complex. Obviously there is a cost to the effort associated with project management, but there are many benefits that are obtained as well. These benefits far outweigh the costs.

The TenStep Project Management Process (TenStep) is designed to provide the information you need to be a successful Project Manager, including a step-by-step approach, starting with the basics and getting as sophisticated as you need for your particular project. TenStep is a flexible and scalable methodology for managing work as a project. The basic philosophy is “large methodology for large projects, small methodology for small projects™”. TenStep shows you what you need to know to manage projects of all size.

### **About the “TenStep” Name**

The TenStep "steps" represent a need for more and more project management discipline and control. So, for instance, we think all projects should be defined (step 1), even if you do not have a workplan. Of course, as projects get to any kind of size, a workplan is needed as well (step 2). Then if you create a workplan, you need to manage it (step 3). If your project is small, you may not be proactively managing risk and quality, but when problems arise, you need to handle the issues (step 4). As a project gets larger, you need to worry about scope change (step 5), etc.

The bottom line is that small projects rarely have formal quality plans and they rarely manage a metrics process. From a scalability perspective, they don't need to. However, when you are dealing with larger and larger (longer and longer) projects, you reach a point where all of the steps are important. The steps are inclusive of the prior steps. A large project should be planning (step 1 and 2) and managing (steps 3 through 10) all aspects in parallel. However, smaller projects may be focusing on a fewer number of project management steps.

Not surprisingly, TenStep is divided into ten steps – the first two for definition and planning, and the next eight for managing and controlling the work. This paper will provide a high-level overview of the TenStep process and the purpose of the ten steps.

### **1.0 Define the Work**

Before the project work begins, there needs to be time spent in planning to make sure that the work is properly understood and agreed to by both the Project Manager and Project Sponsor. In this step, the Project Manager spends the time defining the work to ensure that the project team and the customer have common perceptions of the project, including what it is going to deliver, when it will be complete, what it will cost, who will do the



work, how the work will be done, and what the benefits will be. The larger the project is, the more important it is that these factors be mapped out formally and explicitly. All projects should start with this type of upfront planning to prevent future problems caused by differing viewpoints on the basic terms of the project. The major deliverable from this step is the Project Definition (some companies call this a charter).

## **2.0 Build the Workplan and Budget**

In this step, the Project Workplan is created. The workplan is a vital tool to ensure that the project team knows what they need to do. Different approaches should be taken in this step according to the size of the project. The workplan for small projects can be built without a lot of formality. It is possible to use a project management package like MS Project, or a spreadsheet, or a piece of paper. The Project Manager can sit down, with other team members if appropriate, and lay out the work to be performed.

If you do not have a workplan template to use as your starting point, the Work Breakdown Structure (WBS) technique can be used for both medium and large projects. TenStep walks the reader through the steps to creating a workplan from scratch, starting with a WBS, sequencing the activities and adding dependencies to create a network diagram, adding effort hours, resources, etc.

## **3.0 Manage the Workplan and Budget**

By now, you have created a Project Definition and a Project Workplan. Now you must manage the workplan, and ensure that it represents the current status of the project. The workplan should be kept up-to-date and should always tell you how much work is remaining.

For the most part, the workplan will need to be reviewed on a weekly basis. During this review, update the workplan according to work that has been completed. It is also important to identify work that has not been completed, but should have been at this point in time. The remaining work should be evaluated to see if the project will be completed within the original effort, cost, and duration. The workplan can be further adjusted according to this information.

Other factors that should be considered when determining project progress include a comparison of budget and actual expenditures made, any signs that the project may be in trouble, and an examination of the project's critical path. TenStep contains a number of techniques to utilize if your project is behind schedule or is projected to go over budget.

For any size project, the first priority should be to complete the project within the original estimates for effort, duration and cost. If any of the original estimates cannot be met, new estimates need to be prepared and communicated to your management and to the customer. On a monthly basis, adjust future work to reflect any additional information or detail.

## **4.0 Manage Issues**

If a problem arises that the Project Manager and the team can resolve, then it is just one of the many fires that will ignite and be put out in a given week. However, an 'issue' arises when a problem will impede the progress of the project and cannot be resolved by the Project Manager and project team without outside help. This step provides guidance to help put a process in place to make sure that the appropriate people are aware of the issue and that the issue can be resolved as quickly as possible. There are also a number of problem solving techniques identified to help resolve these issues.

Issues management is one of the fundamental processes of TenStep, and it is a skill that all Project Managers must master. Most projects of any size have to deal with issues. Once an issue has been identified and possible consequences have been investigated, it must be resolved quickly and effectively. Issues cannot be ignored and they cannot be deferred to some later time. Appropriate stakeholders need to be informed of any changes to the original Project Definition caused by the issue and its resolution.

## **5.0 Manage Scope**

Scope is the way that we describe the boundaries of the project. It defines what the project will deliver and what it will not deliver, what data is needed and what is not needed, what organizations are affected and which are not, etc. Without proper scope definition, you have no chance to manage scope effectively. The purpose of scope change management is to protect the viability of the current, approved Project Definition. When the project was defined, certain expectations were set as to what the project was going to produce for an agreed upon cost and within an agreed upon timeframe. If the deliverables change during the project (and usually this means that the customer wants additional items), then the estimates for cost, effort and duration may no longer be valid. That is really the essence and purpose of scope change management – to ensure that the initial agreements are met, and that the project team and those same stakeholders agree to any changes to the expectations.

Different people have the ability to surface scope change requests. Before any changes to scope can be implemented, the impact on the project must be determined in terms of time, cost and quality. The Project Manager can then present the proposed change, along with the overall impact the change would have on the project, to the Project Sponsor.

Scope change management is about managing change and ensuring that the right people can make informed decisions. Sometimes the Project Manager thinks that scope management means having to tell the customer 'no'. That makes the Project Manager nervous and uncomfortable. However, effective scope management is the art of getting the Sponsor to say 'no' (or even 'yes').

## **6.0 Manage Communication**

Properly communicating on a project is a critical success factor for managing the expectations of the customer and the stakeholders. If these people are not kept well informed of the project progress there is a much greater chance of problems and difficulties due to differing levels of expectations. In fact, in many cases where conflicts

arise, it is not because of the actual problem, but because the customer or manager was surprised.

Two typical forums for communicating status are through a Status Meeting and Status Reports. All projects should communicate status. This includes reporting from the project team to the Project Manager and reporting from the Project Manager to the customers and stakeholders. While small projects usually do not require much more than basic reporting, medium projects require a more formalized set of activities. Larger projects require the most sophistication in how they communicate to various constituents. This multi-faceted approach is defined in a Communications Plan.

## **7.0 Manage Risk**

Risk refers to future conditions or circumstances that exist outside of the control of the project team that will have an adverse impact on the project if they occur. In other words, whereas an issue is a current problem that must be dealt with, a risk is a potential future problem that has not yet occurred. Successful projects try to resolve potential problems before they occur. This is the art of risk management. Risk management is a proactive process that is invoked to attempt to eliminate potential problems before they occur, and therefore increase the likelihood of success on the project.

Since small projects usually do not have a long duration, there is not as much opportunity for future problems. For medium and large projects, you perform a complete assessment of project risk when the project is defined. A risk level should then be assigned to each risk identified, along with the likelihood that the risk will occur. Risk plans are created for high-risk items that have a large impact on the project. Other combinations of high to medium risks, and high to medium likelihood should also have risk plans prepared.

During the project, the Project Manager needs to monitor the risk plans to ensure they are being executed successfully. At the end of each phase or major milestone, the Project Manager also needs to perform an additional risk assessment based on current circumstances.

## **8.0 Manage Documents**

This step discusses the storing and sharing of electronic and paper documents. In general, the idea of document management is similar to what is done with computer source code management. These considerations are trivial for small projects. For large ones, these processes need to be planned ahead of time, or else confusion, uncertainty and extra work will occur when the project is in progress. The larger the project, the more rigor and structure are needed to manage documents. If you do not think through a good document management plan ahead of time, you can end up with a big mess trying to save and find documents. Various factors need to be considered to successfully manage documents. These include: where you will store the documents, how they will be organized, tools to use, access and security rules, keywords/indexing, naming standards, version management, completion status, retention/ purging, backups and standard template formats.



## **9.0 Manage Quality**

Quality is ultimately defined by the customer, and represents how close the project and deliverables came to meeting the customer's requirements and expectations. Our goal is to meet the customer's requirements and expectations. This is a critical point. Sometimes there is a tendency to think that 'quality' means the best material, the best equipment and absolutely zero defects. However, in most cases, the customer does not expect, and cannot afford, a perfect solution.

The purpose of the quality management step is to first understand the actual expectations of the customer in terms of quality, and then put a proactive plan and process in place to meet those expectations. A faulty process cannot produce a consistently high quality product. There needs to be a repetitive cycle of measuring quality, updating processes, measuring, updating processes, etc. To make the quality management process work, collecting metrics is vital.

One of the purposes of quality management is to find errors and defects as early in the project as possible. Therefore, a good quality management process will end up taking more effort hours and cost up-front in the project. However, there will be a large payback as the project progresses. Small projects do not require much more than basic quality control, but for medium and large projects, a Quality Plan should be constructed to make sure that the project is being completed to standards.

## **10.0 Manage Metrics**

Gathering metrics on a project is the most sophisticated project management process, and can be the hardest. Because metrics can be hard to define and collect, they are usually ignored. This is unfortunate because it is very difficult to improve the quality of your deliverables or your processes if you are not gathering metrics. Metrics are used to give some indication of what the beginning state of quality is, and whether quality is increasing or decreasing.

At a high level, it is also worth noting that metrics management can be used effectively on medium/large projects because there is enough time to capture the data, analyze the results and make appropriate changes. The most value is gained, however, if the metrics are used to drive improvements on an organization-wide basis.

For the most part, small and medium projects should concern themselves with capturing metrics that are required across the entire organization. Depending on the organization, there may also be more information required for medium projects. Large projects should definitely be capturing metrics that will provide information on the quality of the project and the processes used to create the deliverables. This process will result in the creation of a Project Scorecard. Steps to creating a Project Scorecard include identifying criteria for success, assigning potential metrics, looking for a balance, prioritizing the balanced list of metrics, setting targets, and adding workplan detail.

## **Summary**



TenStep, Inc.  
2363 St. David's Square  
Kennesaw, GA 30152

This is the essence of the TenStep Project Management Process™. Additional detailed information includes overall processes, best practices, examples, techniques, templates, deliverables, workplan activities, white papers, training material and much more. This process contains all the information you need to successfully manage projects.

### **Author Biography**

Tom Mochal has over 23 years of IT experience, at Eastman Kodak, Cap Gemini E&Y, The Coca-Cola Company and Geac. He is currently President of TenStep, Inc., a project management and methodology consulting and training company. Tom has published hundreds of columns, and has presented and trained on project management and life-cycle topics around the world. He has also developed a complete project management methodology called the TenStep Project Management Process™ ([www.TenStep.com](http://www.TenStep.com)), a methodology for implementing and supporting project management within companies called the PMOStep Project Management Office™ ([www.PMOStep.com](http://www.PMOStep.com)) and an application support methodology called the SupportStep Application Support Process™ ([www.SupportStep.com](http://www.SupportStep.com)).