P e t e   F o w l e r
CONSTRUCTION
S e r v i c e s ,   I n c .

OMMA-Goodness!™ Project
Management Framework: In-Brief

Summary

Successful management of projects is hard, especially with lots of parties involved and more things to do than you can keep together in your mind, or even in your day-planner. A Project Management system is the closest thing we have to a guarantee of success. The *OMMA-Goodness!™ Project Management Framework* is a simple process that distills the fundamentals of effectively bringing people together to accomplish a project objective. You will not only succeed in accomplishing your objective, the people you work with will say "OMMA-Goodness!™, what a great Project Manager!"

"OMMA-Goodness!™" is a memory aid (mnemonic device) that stands for Objective, Method, Milestones and Actions. The *OMMA-Goodness!™ Project Management Framework* begins with a clearly stated Objective and a One Minute Summary, which are used to orient the team and help maintain focus. We step through a proven Method in a Project Planning Meeting to refine our Project Plan in multiple passes, keeping our critical data organized in the Milestones section, and clarifying the Scope with a Work Break-Down Structure. We then identify Actions required to complete the Milestones. From there we estimate durations and decide when and by whom Actions will be performed, which gives us Budget and Schedule data. At the end of the Project Planning Meeting we set the date and time for the first of our regular Project Status Meetings where we compare progress to plan, which creates a natural feed-back loop that leads toward success without relying solely on hope, the force genius, or on natural organizational skill. The Method naturally lends itself to building-in a quality control mechanism using Hold-Points.

Planning Steps

Read straight through the steps. Return after reading the Example, referring to definitions of the <u>Project Management Terms</u> as you go.

1. Select a <u>Project Manager</u> (or Coordinator) who will accept full responsibility for management and execution of the Plan. Print, open or draw a <u>Project Plan</u> form.
2. Write your <u>Objective</u>; then "<u>One Minute Summary</u>" the basic project info.
3. Select a <u>Method</u> or use 7-W's: Who, What, When, Where, Why, How, and How Much.
4. Make a first-pass brainstorm of <u>Milestones</u> and <u>Deliverables</u>.
5. Quickly list <u>Actions</u> to complete the known Milestones; don't linger in details yet.
6. Convene a <u>Project Planning Meeting</u>. Begin with the One Minute Summary. Update the Objective. Brainstorm more Milestones and Actions. Refine the <u>Scope</u> into a <u>Work Break-Down Structure</u>. Brainstorm the <u>Schedule</u> and <u>Budget</u>. Finalize Milestones, assign Actions and estimate durations. Set the <u>Project Status Meeting</u> date.
7. Following the planning meeting, update the Project Plan; refine the Objective, use the Method check-list to ensure the Plan is complete, update Milestones including <u>Hold-Points</u>, complete the list of Actions and assign "Priority, Who, When, Duration and Cost" for each.
8. Organize, lead, direct and manage execution of the Actions.
9. Compare progress to the Scope, Budget and Schedule in an <u>Earned Value Analysis</u>.
10. Conduct a <u>Project Status Meeting</u>; compare performance to plan; update the Plan.
11. Repeat steps 8-10 as necessary. The last "Project Status" is a "Project Close".

Example

1. Carl's Construction is planning their next Project, called *Otto's Outhouse*, using their Project Management Framework. Pepe is a new Project Manager. To avoid the distraction of struggling with a technology-based solution, Pepe will use a new spiral notebook, which will also serve as his project diary, instead of a Project Plan form. He formatted the Plan on two opposing pages; Objective, Method and Milestones on the left, Actions on the right including columns for Description, Priority, Who, When, Duration and Cost.
2. Pepe modified the standard company Objective: "We will complete the *Otto Outhouse* as promised, within budget and schedule. We will earn referrals from the client and the planned profits." (See attached Project Plan form)
3. Pepe's used the 7-W's Method. He summarized his project using each line in the method: (1.) Who: Owner = Otto. GC = Carl's Construction. Roofer = Ron's Roofing. (2.) What: New outhouse 4 feet square, 8 feet tall. (3.) When: Next Week. (4.) Where: 100 feet from existing residence. (5.) Why: Old one blew over. (6.) How: Two doors and one interior seat. Wood frame, wood siding, wood shingle sloped roof. (7.) How Much: Fixed price contract for $4,693.95.
4. Pepe's first-pass brainstorm of Milestones and Deliverables was easy since he composed the estimate, Carl already signed the contract with the Owners, and the company always begins with a Scope, Budget and Schedule on the list. Estimate categories included: Grading & Excavation, Framing, Roofing, and Final Clean-Up so Pepe added these as Milestones. He also knew they needed to get a permit and have a final inspection.
5. Pepe listed Actions to complete the known Milestones, but didn't linger in details yet.
6. Pepe and Carl met for a Project Planning Meeting and began with the One Minute Summary. They updated the Objective and brainstormed more Milestones and Actions, including adding the Estimate and Contract with the Owner both marked as DONE, as well as the contract with the Roofer that was not yet complete. They decided to use the list of Milestones as the Work Break-Down Structure which would serve as their Scope summary for what they agreed to in the Contract with the Owner. Pepe used the WBS as the outline for a Budget and Schedule. They set a date and time for the first Project Status Meeting which Carl insisted happen before construction started, so the meeting became a Hold-Point.
7. After the Planning Meeting, Pepe updated the Plan, refined the Objective, used the Method as a check-list to ensure the Plan was complete, updated the Milestones, and completed the list of Actions, assigning "Priority, Who, When, Duration and Cost" for each item.
8. Pepe organized and managed execution of the Actions, marking those completed as DONE.
9. Pepe completed all pre-construction activities, updated the Plan, Scope, Budget and Schedule, and prepared an Earned Value Analysis. He prepared an Agenda for his meeting with Carl.
10. As planned, Pepe met with Carl to compare his progress to plan in a Project Status Meeting. Carl was thrilled! They walked through the agenda and composed and prioritized a list of actions to move through construction, including: a Project Kick-Off Meeting, beginning and inspecting grading & excavation, beginning and inspecting framing, Project Status Meeting #2, beginning and inspecting roofing, final sign-off of the permit, final clean-up, Project Status (Close) Meeting #3 and sending all project documents to storage.

Example Project Plan

Objective: "We will complete the *Otto Outhouse* as promised, within budget and schedule. We will earn referrals from the client and the planned profits."

Method

1. What: New outhouse 4 feet square, 8 feet tall.
2. Who: Owner = Otto. GC = Carl's Construction. Roofer = Ron's Roofing.
3. When: Next Week.
4. Where: 100 feet from existing residence.
5. Why: Old one blew over.
6. How: Two doors and one interior seat. Wood frame, wood siding, wood shingle sloped roof.
7. How Much: Fixed price contract for $4,693.95.

Milestones & Deliverables

1. PRE-CONSTRUCTION
   A. Estimate (DONE)
   B. Contract with Owner, including the Scope (DONE)
   C. Budget
   D. Schedule
   E. Permit: Get it.
   F. Contract with Roofer
   G. Agenda for Project Kick-Off Meeting
   H. HOLD-POINT: Project Status Meeting #1
2. CONSTRUCTION
   A. MILESTONE: Project Kick-Off Meeting
   B. Grading & Excavation
   C. Framing
   D. Project Status Meeting #2
   E. Roofing
   F. Final Clean-Up
3. PROJECT CLOSE
   A. Permit: Final Sign-Off
   B. Application for Payment
   C. Project Status (Close) Meeting #3

Actions

#	Description	Priority	Who	When	Time	Budget
1	Compose Estimate	DONE	PP	Mon	4.0	0.00
2	Compose and execute Contract with Owner	DONE	CC	Tue	4.0	0.00
3	Project Planning: Initial	DONE	PP	Fri	1.0	0.00
4	Project Planning Meeting	DONE	CC/PP	Fri	2.0	0.00
5	Update Project Plan (per Project Planning Meeting)	DONE	PP	Mon	1.0	0.00
6	Compose Budget	DONE	PP	Mon	0.5	0.00
7	Compose Schedule	DONE	PP	Mon	0.5	0.00
8	Permit: Get it.	DONE	CC	Mon	3.0	82.61
9	Compose Contract with Roofer	DONE	CC	Mon	2.0	0.00
10	Project Kick-Off Meeting Agenda	DONE	PP	Mon	2.0	0.00
11	HOLD-POINT: Project Status Meeting #1		CC/PP	Mon	1.0	0.00
12	Project Kick-Off Meeting		ALL	Tue	2.0	0.00
13	Begin Grading & Excavation		MM	Tue	8.0	1,111.00
14	Inspect completed Grading & Excavation		CC	Wed	2.0	0.00
15	Begin Framing		MM	Wed	16.0	912.00
16	Inspect Framing		CC	Thu	2.0	0.00
17	Project Status Meeting #2		CC/PP	Wed	1.0	0.00
18	Roofing		RR	Thu	-	445.00
19	Inspect Roofing		CC	Thu	2.0	0.00
20	Permit: Final Sign-Off		MM	Fri	1.0	0.00
21	Final Clean-Up		MM	Fri	16.0	610.00
22	Compose and deliver Application for Payment		PP	Fri	2.0	0.00
23	Project Status (Close) Meeting #3		CC/PP	Mon	1.0	0.00
24	File all project documents in storage		PP	Mon	1.0	0.00
25	TOTAL				75.0	3,160.61

Project Management Terms

1. Project: A temporary endeavor, that includes a beginning and an end, to create a product or service.
2. Project Management: The discipline of organizing and managing resources to deliver a defined outcome (Objective / Scope), within the constraints of the Budget and Schedule.
3. Project Manager (or Coordinator): A PM (or PC) is a professional responsible for planning, budgeting, scheduling and managing all project resources, including personnel, to deliver the project Objective; one who executes and follows-up on the Project Plan and reports Project Status.
4. Project Plan: A document that defines the project Objective, Method, Milestones, and Actions; contains a list of documents that define 100% of the Scope, Budget and Schedule.
5. Scope: The Scope of Work is the sum total (100%) of all a project's products and their requirements or features, including all labor, materials and equipment required to complete it; a Scope document is the written representation (100%-summary) of the scope, often best depicted in a Work Break-Down Structure.
6. Budget: An itemized list of expected costs or available funds for a project or specified Scope, often based on the Work Break-Down Structure. A control mechanism to compare to actual expenses.
7. Schedule: A list or graphic of activities and associated dates, often based on a Work Break-Down Structure; may include who is responsible and how activities relate to each other. Common forms are the Bar (Gantt) Chart or Critical Path Method.
8. Objective: A concisely written goal of specific, measurable outcomes including a 100%-summary of the Scope, Budget and Schedule.
9. Milestone: An event that marks the completion of a Deliverable, a Hold-Point on a schedule, or a flag in the Project Plan to highlight completed work; often used to ensure project progress.
10. Deliverable: A measurable, tangible item produced during project execution. Some are external and subject to approval, but some are internal only.
11. Action: A discrete, specific, measurable task, often performed by an individual, usually between 1/10-hour and 8-hours and rarely more than 80-hours.
12. Hold-Point: Milestone or critical stage in a project for verifying conformance with plan or quality standards.
13. Problem-Solving: A learning situation involving more than one alternative from which a selection is made in order to attain a specific goal (Objective); usually to move the situation from where it is to the best available alternative. One METHOD: (1.) Define the Problem (2.) Identify Options (3.) Identify the Best Solution (4.) Plan How to Achieve the Best Solution (5.) Evaluate Results.

OMMA-Goodness!™ Components

14. One Minute Summary: An A to Z, 100%-summary "restatement of the obvious" to describe "who, what, when, where, why, how and how much" (7-W's), in 250 words or less to orient everyone to the big-picture before emersion into the details.
15. OMMA-Goodness!™ Project Planning Form: Planning form with sections for writing the Objective, Method, Milestones & Deliverables, and Actions for a project. For use in Project Planning, Project Planning Meetings and Project Status Meetings.
16. Method: A problem-solving framework or check-list that we apply the specific facts of our project to, as an aid in Project Planning. Some Methods have a check-list or "Menu of Deliverables". EXAMPLES: Scientific Method, AA's 12 Steps, Deming's 14-Points, PMI's 9 Categories and even the 5-W's.
17. Menu of Deliverables (or Milestones): A list of common Deliverables (or Milestones) associated with a specific problem-solving method or project type, used as a check-list during project planning.
18. Project Planning Meeting: A meeting to perform a structured Problem-Solving session. AGENDA: 1. One Minute Summary, 2. Plan Review, 3. Review Scope, Budget & Schedule, 4. Method and Menu, 5. Brainstorming and Update Plan, 6. Update Actions, 7. Arrange Status Meeting. PM (or PC) deliver complete Project Plan following meeting.
19. Work Break-Down Structure (WBS): A project management technique for defining and organizing the total Scope using a hierarchical tree structure. The first two levels (the root node and Level 2) define a set of planned outcomes that collectively and exclusively represent a 100%-summary of the project Scope. At each subsequent level, the children of a parent node collectively and exclusively represent 100% of the scope of their parent node.
20. Earned Value Analysis (EVA): Technique for measuring progress which combines measurement of actual performance of Scope, Schedule, and Budget, organized using a Work Break-Down Structure, and compares them to plan in an integrated methodology.
21. Project Status Meeting: A meeting for a structured review of project progress compared to plan. AGENDA: 1. One Minute Summary, 2. Plan Review, 3. Review Scope, Budget & Schedule, 4. Old Business, 5. Method and Menu, 5. Performance Analysis, 6. New Business, 7. Brainstorming and Update Plan, 7. Update Actions, 8. Arrange Next Meeting. PM (or PC) deliver complete Project Plan following meeting.
22. Brainstorming: An activity used to generate many creative ideas that have no right or wrong answers and are accepted without criticism.