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### A Practical Guide to Integrated Project Management



*The All-In-One Solution For Your Creative Team*

## INTRODUCTION

Much has been written about the importance of project management concepts, logical steps and how organizations can benefit from the project management way of thinking from top to bottom. It's been suggested by many that corporate CEO's could learn a lot from the good project managers out there who are living the PM life daily on the front lines with the project team and client. Project management practices dictate that good financial decisions be made, that the organization's goals and mission be considered when carrying out project tasks, that the needs of the client always be at the forefront, and that outdated technologies, processes and practices be replaced with current ones that can more easily and cost-efficiently be carried out and supported.

Now we move on to the concept of Integrated Project Management (IPM) and getting the entire organization on board with the project management way of life thought process. Is that a good thing? In my opinion, most definitely yes, as project management practices are in place to more efficiently deal with the daily tasks of the projects. Most projects are just smaller reflections of what is happening in the larger corporate environment, as most corporate activities – when examined closer – could be defined in terms of a series of projects. That is one of the key reasons why integrated project management in the organization actually makes good sense. And why, it can be very successful.

The background of the slide shows a blurred office scene with several people working on laptops. A prominent blue rectangular box with rounded corners is positioned in the center-right of the image, containing the chapter title and subtitle in white text.

## **Chapter 1**

What is Integrated  
Project Management?

**The purpose of Integrated Project Management (IPM) is to establish and manage the project and the involvement of the relevant stakeholders according to an integrated and defined process that is tailored from the organization's set of standard processes.**

In other words, you aren't managing projects to a rigid set of standards that apply across the board. Rather, you are applying project management logic, skills, concepts, and practices in a way that spoons with your corporate culture, goals, mission, and business processes and policies. In a perfect integrated project management world, project practices would never conflict with the plans and direction of the organization. Instead, one would support the other – project decisions would be made in the best strategic and financial interest of the organization at every intersection. We know that can't be the case 100% of the time... there is no such thing as a perfect world. But in an organizational culture striving to make this a reality, it can and will happen much more often than it won't.

#### **Integrated Project Management involves the following:**

- ✓ Establishing the project's defined process at project startup by tailoring the organization's set of standard processes
- ✓ Managing the project using the project's defined process
- ✓ Establishing the work environment for the project based on the organization's work environment standards
- ✓ Using and contributing to the organizational process assets
- ✓ Enabling relevant stakeholders' concerns to be identified, considered, and, when appropriate, addressed during the development of the product or project end solution
- ✓ Ensuring that the relevant stakeholders perform their tasks in a coordinated and timely manner to address product and product component requirements, plans, objectives, problems, and risks; to fulfill their commitments; and to identify, track, and resolve coordination issues

## **SUMMARY**

**Just like project management, IPM is about logical best practices and incorporating them into daily work activities. It's best for business and – if successfully carried out – it should be best for the bottom line of the entire organization.**



A group of people are sitting in a circle, holding hands, suggesting a collaborative or supportive environment. The image is slightly blurred, focusing on the hands and the text overlay. A blue rectangular box is positioned on the right side of the image, containing the chapter title and subtitle.

## **Chapter 2**

Two Key Steps to Making  
IPM a Reality

# Engagement Management as a PM Role

Once the organization is dedicated to moving forward with such a project-driven focus, here's what needs to happen in order for integrated project management to really become part of the cultural change and new way of thinking:

- ✓ PM type thinking needs to be making its impression from the first client touchpoint through to end user solution
- ✓ Project management needs to be represented at the senior corporate level. The PMO director is not high enough in the corporation hierarchy with enough influence to make integrated project management practices and thinking an ingrained and enforceable reality.

Generally, when a project comes up, a project manager is identified and then tasked with engaging the person handing off the project to your PM infrastructure to get as much client and project information as he can. You're basically talking to the middleman on the showroom floor, not the person with the goods or the money. You derive what you can and hope you can put together some sort of accurate budget, resource plan, project schedule, and kickoff presentation before you formally start the project with the client. Often, it's at this point where you realize that expectations were not properly set, some promises were likely made that can't be fulfilled (at least not at the price given), you have a budget that won't really work, a timeline that is already in danger, and a client who is looking to you to set things straight. They are looking for magic... but at no extra cost.

**“ If the project manager is really defined more as an engagement manager, then everything can become more accurate from the outset: estimates, planned timeframes, expectations, etc. ”**

Sound all too familiar? There must be a better way...If the project manager is really defined more as an engagement manager, then everything can become more accurate from the outset: estimates, planned timeframes, expectations, etc. The account manager IS the project manager. Or, the project manager is an extension of the sales group – not part of it but so closely tied in that they are part of every sales process. The project manager is involved in the pre-sales meetings with the project client, aiding in establishing a more accurate estimate, resource plan, initial requirements, and initial draft project schedule even before the ink is dry on the contract. The PM is present when the deal is sealed and they are ready to run with the project. This is because they are intimately aware of the project needs and details, have helped work out all the kinks early in the process, and have corrected any poor assumptions and expectations that may have been made. This is also because they are intimately engaged with the client already during the pre-sales and sales finalization process. The relationship has been made, the trust is already there and everyone knows what is going to happen next.



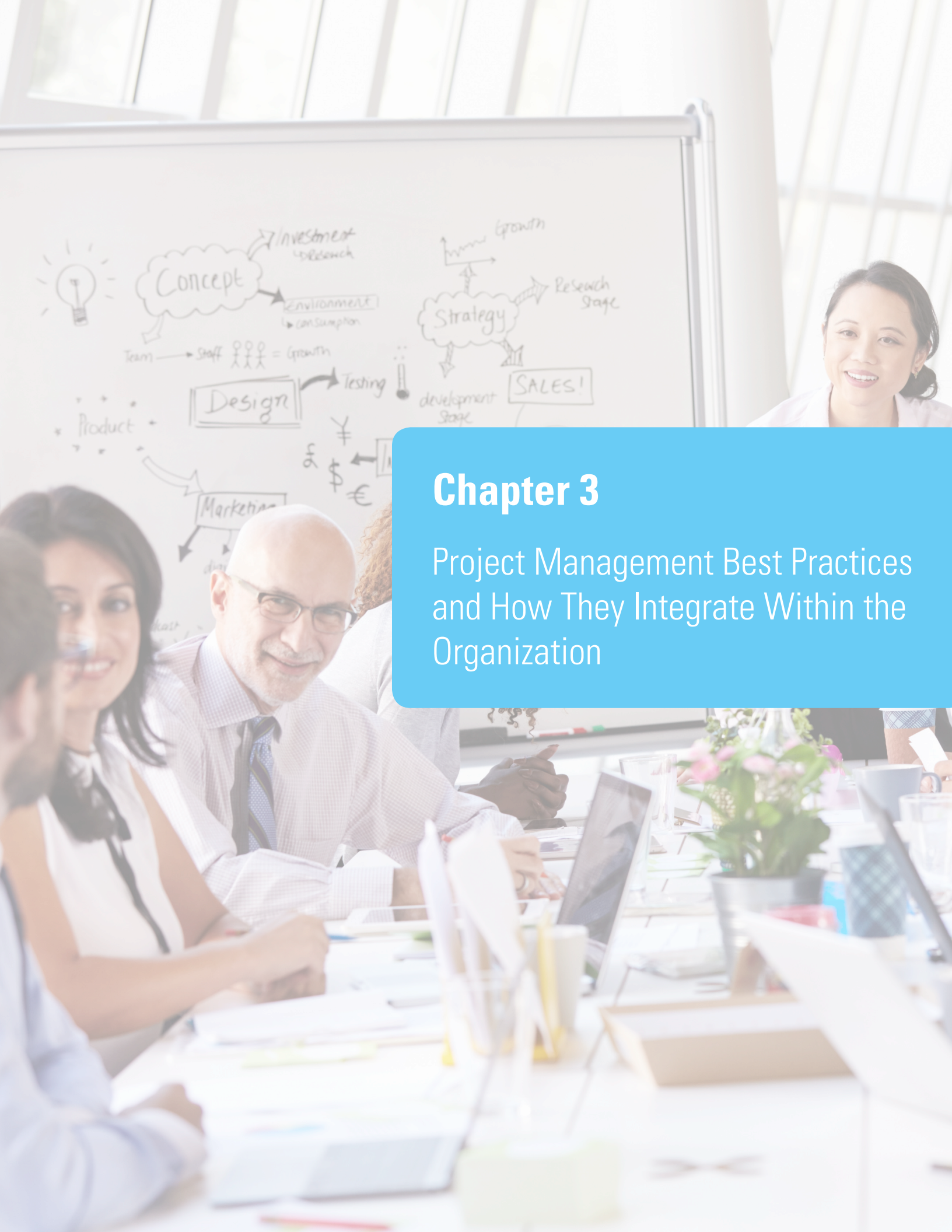
# Placing a CPO at the Executive Level of the Company



Consider the difference a Chief Project Officer (CPO) in place at the top of the organization would make for the overall project culture and project integration culture throughout. The proposed CPO role would be the mouthpiece for the PM organization within the organization. The funding push, the resource oversight, the project team assignments, the policies, procedures, and marketing for this team would all be lead by, championed by and overseen by this key C-level role. All initiatives within an organization and for external clients of an organization could potentially be categorized as a project. With a CPO position leading this unit of the business, it could more easily be monetized as a profit center. Many organizations try to do this yet fail. Why? Because their PMO is not visible enough, nor are they forcing everything that SHOULD be a project through this unit as a project. With the visibility of the CPO position, this would happen, resulting in far less chance of failure for the PMO and the projects led by its project managers.

## SUMMARY

**What needs to happen is for project management to have a much more integrated and visible role in the organization. In some organizations it is responsible for most of the revenue, especially professional service focused organizations. Why not ensure that it is well represented in the organization and that its practices are integrated throughout the organization (and really vice versa to ensure a cohesive flow of activity from project to department and department to project)?**



## Chapter 3

Project Management Best Practices  
and How They Integrate Within the  
Organization



As previously mentioned, integrated project management within the organization is ensuring that the processes and practices of the organization favorably support and align with the organization's project delivery methodology. Along with that, integrated best practices are an equally good idea as the culture of the organization changes and evolves to support the projects and teams that drive the work efforts and much of the incoming revenue of the organization. To that end, there are best practices to consider and how they should be incorporated into the organization. Best practices vary from company to company, from project to project, from industry to industry and even from individual to individual. Let's review three practices that are critical not just to projects, but also to entire organizations, as examples of how to incorporate integrated project management into them and why that is important.



## I Meetings

It's important to run all meetings in an organization in an efficient and effective manner in order to achieve the best results for the project. That's part of integrated project management. How do we accomplish this? How should project meetings be prepared for, planned, and led? Here are some tips:

### ✓ **Plan the Meeting**

Always prepare and distribute an agenda in advance. Follow the agenda as well as the specified timeframe. By doing so, you will have the reputation as the great meeting facilitator and people will prepare, attend and pay attention.

### ✓ **Conduct**

Again, stick to the agenda as much as possible. By doing so, attendees know what to expect and know that the meeting will last 'x' amount of time and that they are expected to attend and participate as the agenda dictates. There will be no real exceptions to this and with such high attendance and participation the productivity level should be at the best possible level for your organization.

### ✓ **Follow-up**

It may be the most important part of the meeting. This is where you ensure that everyone left the meeting with the same understanding and on the same page. It's not enough to just conduct a project or business meeting. Meetings have a purpose. And if that purpose isn't apparent to everyone then it wasn't a success. What if you left thinking Mr. Z was assigned a critical task and you plan to receive key information about that task from him in 5 days, but he thought you were calling for another meeting in 5 days to discuss the task? That miscommunication could cause a significant project delay or important deadline missed. This can easily be resolved with a follow-up distribution of notes and assignments to all attendees within 24 hours asking for review and feedback. It doesn't have to take 5 days to get everyone on the same page.



## | Status Reporting

This is a key activity of project management. I feel strongly that “one size fits all” is important to status reporting activities, as it streamlines reporting and keeps the preparer from being overloaded with the activity. But project status reports are not the only status reports that individuals produce. Department status reports to the executive level of the company are commonplace as well. Integrating project management practices, processes and templates throughout the organization – and yes, with status reporting as well – will help ensure that individuals throughout the entire organization get used to seeing the same types of highly informative reporting structures and can review and respond accordingly. There are no ongoing questions or concerns about what key dashboard information means or what report sections are providing. Usually, most status reports – project, department or otherwise – contain a financial aspect, a resource usage aspect, an issues area, a next steps area, and so on. Standardizing these across departments as well as projects means everyone knows what they are looking at. And by including a good dashboard, everyone can have a familiar quick view into project or department “health.”

**“ Integrated project management within the organization is ensuring that the processes and practices of the organization favorably support and align with the organization’s project delivery methodology. ”**



## | Change/Scope Management

Does change only happen on projects? No. Does it happen in departments and throughout organizations? Yes. Is that part of change management and scope management? Yes. It may mean something a bit different in a department than it does on a project where a client likely needs to change direction or come up with more money, but that is the same case for a department head. If he wants, say, more resources than originally planned, then more funding will be needed and likely a change in timeframe will be required as well. That is definitely a change order or a scope management issue, just like we experience throughout projects with the project client.

A photograph of three business professionals in a collaborative setting. A woman with dark hair in a striped shirt stands on the left, looking at a laptop. A man with glasses sits in the center, also looking at the laptop. A woman with blonde hair in a light-colored blouse stands on the right, leaning over the man and looking at the laptop. They are gathered around a wooden desk. A laptop is open in the foreground, and a cup of coffee sits on a saucer. The background is bright and out of focus.

## Chapter 4

Who Should be Involved in  
Integrated Project Management?



When you consider how far spread in the organization your integrated project management practices should be, you have to ask, “who should be involved?” However, it’s probably far easier to decipher who doesn’t need to be involved. For certain, these individuals, levels of authority, and departments should be involved with the rollout of integrated project management practices and project-driven thinking.



### **| Executives**

In the integrated project management process, executives matter. When trying to incorporate sound project management practices throughout the organization that need to be adopted by the masses, buy-in from the executive level staff is critical. Success without it is a rare possibility. And funding for it will never happen, which everything requires at least some level of funding.



### **| Project Teams and Stakeholders**

Of course, when we are talking about project management practices, project teams and all stakeholders must be involved. They are at the core of this involvement. By incorporating the project management practices, templates and policies throughout the organization, then the processes they are used to following to stay on track on projects will help drive efficiencies in the rest of the daily activities within the organization.



### **| Key Departments Important to the Organization’s Daily Operations and Ongoing Involvement in Projects and Client Activities.**

Key departments and their personnel – such as accounting, legal, human resources, and information technology– will benefit by being involved in the integrated project management process. These are all key roles, departments, and personnel who are often involved in projects on an ongoing basis. They play key roles in meetings and in providing information for projects and organizational activities. They also often play client facing roles in the organization.

## **SUMMARY**

**The involvement of personnel in integrated project management needs to be company-wide. It’s not just another “program” or “continuous improvement” concept. Rather, it is a culture, a way of daily life in the company. What works for projects should work for the organization and that means everyone needs to be involved. Everyone plays a key role in IPM’s understanding, adoption, and portrayal to the client.**

# In Conclusion

Integrated project management isn't anything new or earth-shattering. It's about making sure that your organization is aligned with how you run projects and vice versa. Make sure your goals and missions are in line with your projects and clients. If you stretch yourself too far outside how your organization is structured and outside your comfort zone on project delivery, you will begin to see a decrease in client satisfaction as you struggle to "make it work." If you're faking it in the organization, it will eventually show through to the client, and poor project delivery will follow. It needs to be an ingrained culture, not a rigid policy or set of procedures. That's practical integrated project management in a maturing organization.

## About the Author

Brad Egeland is a Business Solution Designer and an Information Technology / Creative project Management consultant and author with over 25 years of software development, management and creative project management experience. He has successfully led creative project initiatives in Manufacturing, Government Contracting, Creative Design, Gaming and Hospitality, Retail Operations, Aviation and Airline, Pharmaceutical, Start-ups, Healthcare, Higher Education, Nonprofit, High-Tech, Engineering and general IT.

In addition to his accomplishments in IT development, resource and creative project management, he has also authored more than 5,000 expert advice and business strategy articles, eBooks and videos on creative project management, business strategy, and information technology and best practices for his own website and for clients all around the world. Brad is highly regarded as one of the most prolific go-to authors on creative project management general topics, advice and strategy in the world. He often bases his articles on his own personal experiences, successes and frustrations, providing insights on how to combat issues and deficiencies encountered along the way to the average creative project manager, business owner or strategist looking for help in a given situation.

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**Implementing an all-in-one project management solution is not a quick-fix.  
It takes time and dedication.**

**Connecting new software to departmental and organizational goals and quantifying  
greater ROI for your agency will help you get the buy-in you need to make it work.**

Start by scheduling a demonstration of Workamajig to see how  
it could help your departments and your agency.

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