



## Projects should move you forward, not in a circle

Effective project management saves the CEO hundreds of hours a year. Otherwise, they get stuck diagnosing problems, mediating conflicts and arguing budgets.

*Van Mell Associates' simple tools and quiet facilitation got us moving: we'd been trying to do too much. Our first project summary showed we'd overcommitted ourselves. Our new 1-page goal tree clarified priorities and unlocked energy to focus on the big picture.*

- Bob Wahlin, President, Stoughton Trailers LLC

### Don't let the process get in the way

Many project management processes are too complicated. The 1-page project planner on the top of the next page and the "at-a-glance" summary below it keep things simple.

A deck of these simple project plans lets leaders and project managers communicate quickly and clearly. **Miscommunication is the primary reason projects fail.**

Because a **common approach makes it easy to share ideas**, managers learn to think differently about how they use time and money—and enjoy getting recognized for success.

### Projects make the difference

Projects are what transform a business. It's great to perfect your processes, but it takes a project to grow and change, whether it's for marketing, operations, IT, finance, facilities or a hundred other things. **Don't get stuck** while competitors race ahead.

### Team and tools for focus

Good facilitators stay in the background. Our team are experts in each management area,

helping managers present successfully at review meetings. Projects can fail because one question was missed.

Our **Question-Based Planning<sup>sm</sup>** quickly clarifies **objectives and risks**. We can use the same process to create a 1-page "strategy goal tree" in five 2-hour meetings.

### Don't reinvent!

Reinvention is a *huge* waste of time. We founded the International Institute of Management Terms & Practices ([www.iimtp.org](http://www.iimtp.org)) to catalog best practices.

### Benefits to the leaders

- Accelerate transformation
- Have time for the big opportunities
- Get higher project ROI at lower risk
- Help the board or family council stay focused
- Build a catalog of best practices
- Delegate with confidence

### Benefits to the project managers

- Get recognized for important contributions
- Enhance a skill critical to career advancement
- Reveal their leadership potential

*We were growing fast, and I needed my senior managers to work together as efficiently as possible. Van Mell Associates' integrated services got me out of the middle of even big projects. I now look forward to our progress review meetings and reporting to the board.*

- Marcia Christensen, CEO, Forward Service

**We often start by simply cataloging all current projects or running a pilot. The summary on the next page lets leaders engage at the right level.**

*Please call Derrick Van Mell for information.*

## PROJECT PLAN

### LOGO, ORGANIZATION NAME

Project name:

Revised: 30 June 2014

Primary goal:

CONNECTIONS to other goals or projects

- 1.
- 2.
- 3.

#### DELEGATION

<b>Unit</b>		<b>Supervisor</b>	
<b>Department</b>		<b>Leader</b>	
<b>Location</b>		<b>Team</b>	
<b>Key metric</b>			

#### TOP TASKS in sequence

- The team began by studying definitions and best practices.*
1. Initial planning: concept development
  2. Final planning: cost/benefit analysis
  3. Approval and kick-off
  4. Communication
  5. Execution
  6. Monitoring and control
  7. Close-out
  8. Evaluation
  - 9.
  - 10.

#### RESOURCES

#### DURATION

	Lead	Budget	Spent	Hours	Due	Done
1.						
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						

#### COMMENTS

Results:

## PROJECT SUMMARY

PROJECT SUMMARY		Updated: 04 Nov 2015						2014				2015				2016			
Confidential	Priority	Status	PM	\$Ks	Hrs	Primary goal.	Comments	1QTR	2QTR	3QTR	4QTR	1QTR	2QTR	3QTR	4QTR	1QTR	2QTR	3QTR	4QTR
<b>CURRENT PROJECTS</b>																			
<b>STRUCTURE</b>																			
			Joe S	\$24	480	Goal 1.3. Need legal guidance													
			Joe S	\$100	520	Goal 1.4. Includes lease/own													
<b>MARKETING &amp; SALES</b>																			
			Linda P	\$170	1,000	Goal 2.1. Builds on sales pipeline definitions													
			Barry W	\$15	360	Goal 2.4. Need to increase no. of follow-ups													
<b>OPERATIONS</b>																			
			Ann L	\$10	300	Goal 3.3. Rate Gold, Silver, Bronze vendors													
			Jay K	\$35	800	Goal 3.4. Focus on rework functions													
<b>INFORMATION</b>																			
			Art S	\$0	120	Goal 4.1. Phased. Training is separate project.													
			Dale M	\$20	200	Goal 4.2. Mostly staff function, but new tools needed													
<b>HUMAN RESOURCES</b>																			
			Kay M	\$25	200	Goal 5.2. Phased: first is compensation module													
			Steve W	\$18	200	Goal 5.3. After executive cycles complete													
<b>FINANCE</b>																			
			Bob D	\$10	360	Goals 6.1, 6.2. Replicate corporate dashboard													
			Sonia V	\$0	500	Goal 6.4. To help reduce variable cost percentage													