

# #BUSINESS SAVVY PM

TWEET

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Project Management Mindsets, Skills, and  
Tools for Ensuring **Powerful** Business Results

BOOK 01

A THiNKaha® BOOK

#BUSINESS SAVVY PM **tweet** Book01

Project Management Mindset, Skills, and Tools for  
Ensuring Powerful Business Results

Book Excerpt

**By Cinda Voegtli**

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Section I: The PM's Role and Relationships—Being “Business Savvy”

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## Section I

### The PM's Role and Relationships—Being “Business Savvy”

What does it mean to be a “business savvy” project leader? Understand how to be an advocate for the project, from the perspective of its end customers and its business value to your company. Focus on clarity and communications with everyone—the project sponsors, your team, and your customers—with the business as the context. Establish yourself as the leader of a team striving for meaningful business results.

1

The project manager's job:  
Establishing, Quantifying, Propagating,  
and Protecting the Business Goals of  
the project.

2

Establishing the goals: Take the  
initiative from the beginning to help  
set up the project for business success:  
You are not just an order taker!

3

Insist on knowing the project selection criteria & process that led to this project. Why does it exist?

4

The team's job is to provide the right deliverable to customers when needed to fulfill customer needs & meet company financial goals...



5

...at the project cost we are ready to spend and a price they are willing to pay, while leaving the company with a viable profit margin.

6

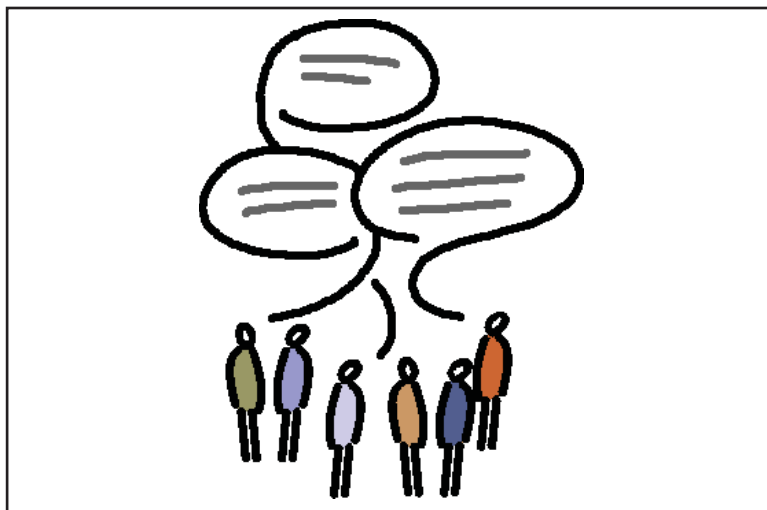
Systematically consider other impacts of the project on the company (e.g. impacts on system architecture & future development) as well.

7

The business savvy PM  
continually insists on  
extreme clarity in both the  
business goals and the  
project justification.

Section II: Business Savvy during Project Start-up

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## Section II

### Business Savvy during Project Start-up

It is the business savvy PM's job to understand the business value of a project—and why your company is undertaking it. Only then can the PM emphasize to the team what they are trying to achieve together and why, once a full project is underway. Understand (even challenge!) the reasons for the project, and be able to communicate the company's strategy and how this project fits in. Participate in early consideration of the business ROI and other customer-related or strategy-focused goals.

49

The concept phase should include the project proposal and a fast go/no-go sanity check. Has one been done for your project?

50

A new project proposal should state the idea, what is needed and why, key business goals, and rough sizing of the envisioned project.

51

Then do a first business case and feasibility assessment—followed by a rough scope recommendation, if this project should go forward.

52

The business case states the next level of justification detail & includes an economic (quantitative) rationale for the project.

53

The kickoff phase will then look further at requirements & solutions, the business case, tradeoffs, & definition of a viable project.

54

80% of the project and product costs are determined in the first 20% of the project's schedule—don't skimp on the front end!

55

A business savvy PM drives the right evaluation to be done in a timely manner, questions cost & benefits, and ensures approval to go.



Section III: Business Savvy during Project Kickoff and Planning

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## Section III

### Business Savvy during Project Kickoff and Planning

A business savvy project manager gets everyone on the same page with a common and compelling set of expectations and goals for project success. Create a clear vision of what this project must achieve and rally everyone around it—team members, stakeholders, and the executives who are sponsoring your project. Continue to communicate the goals as the project’s reason for being and driver of all detailed plans.

62

Identify the core team, the sponsor, stakeholders, & influencers; then involve and engage them in the kickoff process.

63

Hold a kick-off meeting to discuss business goals, draft a project vision, and identify possible alternatives and trade-offs.

64

A kickoff meeting provides a fast, focused start to the project with strong cross-functional and sponsor involvement.

65

Engage your sponsor at the meeting to express and champion the business goals, provide direction, & resolve conflicts.

66

To motivate a Sponsor, understand the WIIFM (What's In It For Me?) for the sponsor and engage them in "business benefit" terms.

67

A two-page project vision document focuses first on customer needs and benefits to be provided, & how they'll measure value received.

68

The project vision document then covers key features, other critical factors, and financials (dates, sales targets, cost targets, etc.)

69

Use the project vision to help clarify that customers are not all the same and may have different requirements and priorities.

Section IV: Business Savvy during Project Execution

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## Section IV

### Business Savvy during Project Execution

Great project managers are business minded and profit aware. They maintain a “life-cycle” perspective on the project.

They keep in touch with all aspects of the project, including cross-functional groups and business sponsors. The key to keeping the project running smoothly is early identification of issues and problems that could threaten the project meeting its business objectives. Establish the communications channels that provide you with insight and understanding of the project status—related to not just schedule and costs, but also to achievement of business goals. Keep those objectives in mind in making changes or addressing project issues.



98

Pay attention to “ilities”:  
Manufacturability, testability,  
serviceability, reliability, certifiability.  
All can impact or kill profits.

99

Plans and Reviews are not just about  
the paperwork. They form a key  
framework for a business-oriented  
project process.

100

Plans and Reviews should not be rigid, be done with a bureaucratic “checkbox” mindset, or force meaningless work.

101

Mini-plans can be drafted & reviews can be held as soon as the information would help someone else’s work or help avoid a later problem.

128

To avoid hits to the project, stay aware of who else is asking for team members' time. Are there priority conflicts to resolve?

129

Continually “carry the flag” for the business goals—build a business-aware mindset & personal decision-making into everyone's work.

130

Focus on results, and threats to results, at every step of the project. That is the business savvy PM's critical and impactful role.

131

Remember: During start-up, employ your own assessments & judgment to help define the business case & a project that will meet it.

137

Executives value PMs who know how to get the right things done and can communicate and make business-based project decisions.

138

The business savvy PM takes initiative and uses leadership skills to motivate others to get the full job done.

## About the Author



Cinda Voegtli is Founder and CEO of ProjectConnections.com, an online project management know-how source and service with over 300,000 members from around the world. She has over 20 years experience in project and portfolio management, process improvement consulting, and line engineering and company management. Over the years Cinda has consulted on project and portfolio management issues to a variety of companies and their unique projects, including Tyco Healthcare/Nellcor Mallinckrodt, Mobil Oil, Pacific Bell, Dow Chemical, NASA, Schlumberger, Aviron/MedImmune Vaccines, Hewlett Packard, and Lam Research. Cinda writes and speaks widely on practical real-world techniques for project and portfolio management that are organization-appropriate, easy to introduce for fast benefits, and adaptable for effective use on a variety of projects.

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The Unique Business Mindset, Skills, and Tools  
for Ensuring Powerful Business Results

"This book provides fast insights that can help lift project managers out of a purely operations mode of thinking and into strategic business-driven thinking that will truly set them apart!"

**Laura Erkeneff, CEO, Training For Techies, Inc.**

"Keeping within scope, time, and cost constraints is no longer sufficient to measure project success. This book provides great guidance for project managers who are looking to successfully lead projects that will have a lasting, positive impact on their organization."

**Kent J. McDonald, Business Advisor, Knowledge Bridge Partners and co-author of Stand Back and Deliver, Accelerating Business Agility**

"The practical project management tips that Cinda Voegtli is known for, in small bite-sized nuggets – delicious! I'll use this book as a quick regular reminder to keep my networking projects on track."

**Jeff Richardson, Empowered Alliances**

**Cinda Voegtli** is Founder and CEO of ProjectConnections.com, an online project management how-to source with over 300,000 members. She has over 20 years experience in project and portfolio management, process improvement consulting, and line management. Cinda writes and speaks widely on practical real-world processes for project and portfolio management.



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