

Five essentials for successful project management

What's in this Success Insight?

Project management is a well-studied discipline. There are many books, tools, courses, etc.—and they all offer good project management guidelines. Why, then, do as many as 84% of IT projects fail in some way? Good methodology is clearly not enough.

Maybe the team doesn't allow enough time for testing, and they find some key functionality isn't working when they go live. What if an important stakeholder wasn't consulted early in the project, and now they're finding issues and creating roadblocks that are making you miss your development deadline?

Projects mean change, and it's not unusual people to resist change even though they don't like the current state. Unconsciously, they seem to prefer what they know over what they don't. Without a clear understanding of what's in it for them from the start, they'll keep asking, "What about..." and can derail the requirement discovery process.

If any of these situations sound familiar, read on to learn some rock-solid ways to avoid project management traps and enjoy successful project management.

This Success Insight provides best practices that address the following key questions:

1. How do I make sure I have the support I need from my executive sponsor?
2. Do we have a project charter that supports our goals?
3. How should I think about resourcing?
4. Has the scope been properly defined?
5. How should we manage risk?

1. How do I make sure I have the support I need from my executive sponsor?

The most effective executive sponsor is at a VP or C-level because their role is to support you and clear all obstacles to success.

Take the following steps to engage your sponsor at the start of the project:

- Invite them to the project kickoff and have them present the vision for the project.
- Send a succinct but informational status report every week.
- Schedule a weekly or biweekly governance call to review your key accomplishments, risks, and blockers with your executive sponsor and other key stakeholders. Projects with a lot of risks and blockers should have a weekly governance call. Make this call 15–30 minutes so it is easier to get on the executive sponsor's calendar.

If your executive sponsor is not engaging with the team or performing their role as the project unfolds, turn the project to yellow status with clearly stated reasons that will get the sponsor's attention. Then schedule some time with the sponsor to resolve this. Request time directly or work with their executive assistant or chief of staff. Prepare to give your executive sponsor a high-level review of the project, ask for what you need, and—if they haven't been consistently attending—outline why it's important for them to attend the governance calls going forward.



Practitioner insight

If you don't have a clearly identified executive sponsor, raise the issue to the highest-level person that you can and let them know that the absence of an executive sponsor is adding risk to the project. We recommend that you put the project in red status until this is resolved.

You can learn more about working with executive sponsors on the [Customer Success Center](#).

2. Do we have a project charter that supports our goals?

State your project's goals clearly in a project charter. This may seem obvious, but it's not unusual for organizations to start projects without clearly stated goals—and some write the charter after the project starts. If you don't have a charter or it needs strengthening, complete these steps:

- **Gather a team to write or update the charter** – Reach out to your executive sponsor to gain their support for identifying and supporting a team to write the charter. Include your

technology and business stakeholders, including those who were involved in the creating the business case.

- **Add measurable success criteria to your charter** – It's not uncommon for organizations to list their goals at a very high level that they're later not able to measure. Take a look at these examples.

Vague, immeasurable goals	Clear, measurable goals
Implement ServiceNow	Implement the Servicenow ITSM suite to create a service portal that deflects callers with common issues to knowledge articles, reduce your mean time to resolution by 15%, and create a formal change management process with a change advisory board to reduce problems caused by changes
Deploy Services Portal	Deploy a portal that gives users a single point of entry to all services at our company.
Install Asset Management	Install hardware asset management to track the lifecycle of devices at our company, centralize purchasing, and make sure devices are reclaimed from departing employees and contractors.

- **Determine what metrics you'll use to measure the success** – Evaluate your metrics to align with your goals. Track them so you can see if you're on target for success during projects and when they're complete. Visit the Customer Success Center for [help defining metrics](#).



Practitioner insight

If the executive sponsor hasn't committed to your goals, have them articulate how they define and measure success so you can gather the supporting data. Document the measurements you'll take and your goals and send them to the executive sponsor for review and approval. Once they're approved, communicate these goals to the team and make them a part of the project artifacts.

3. How should I think about resourcing?

People are usually expected to support projects in addition to their "day jobs." How do you know if you'll get people with the right skills and availability? For instance, even if your organization has a PMO and can provide a project manager, that doesn't mean the person has

enough subject matter expertise to run a software development project. Here are some tips to deal with resourcing challenges:

- **Always have a buffer in your resource plans** – When you have a buffer, you can take care of issues that may come up in addition to what you expect—without affecting the actual time you estimate for the task. Don't estimate low simply to secure a resource. Ask for what you really think you will need.
- **Confirm your resources have availability** – Establish that each member of your project team can commit to the project when you need them. Confirm that you have their manager's approval for them participate in the project.
- **See that your resources have the right skills** – It's not realistic to expect a non-technical person to take on a technical role. Similarly, it's unlikely to be a good fit for a numbers person to become your communications expert. Consider how you can train or provide a coach for any team members who don't have the necessary skills but who are willing to learn them.
- **Think holistically about your resource needs from the start of the project** – For example, are you integrating with any other tools that may require expertise from finance, HR, facilities, etc.? Do you need subject matter experts for training and communications?
- **Avoid the trap of thinking, “Oh, we'll just add resources later if we need them”** – The time it takes to onboard new people will usually offset any productivity you gained by adding extra help later. The book [The Mythical Man Month](#) is a great resource that first addressed this in 1975, and subsequent updates prove its premise to be still true.



Practitioner insight

If management and/or your executive sponsor don't support the above conditions, call out resourcing as a risk that will potentially affect the project timeline. Include resourcing in the weekly status report and mark it as yellow for the duration of the project. Depending on how significant the resourcing deficit is, you may need to put the entire project in yellow.

4. Has the project scope been properly defined?

Your project's success relies on properly defining your scope. To make sure you get this right:

- **Scope the work appropriately** – Often, organizations don't have the right expectations for projects because they haven't accurately scoped the work. For example, an organization may want to implement asset management but their CMDB isn't healthy and the time to clean up the CMDB isn't been factored into the scope. In another example, the organization may want to migrate to a new platform and completely revamp their business processes at

the same time. While it's the perfect time to do that, most organizations only scope for changing the platform and fail to scope for designing and documenting the new processes.

- **Document new processes, requirements, and decisions** – If you're revamping processes as you migrate to ServiceNow, allow time to document the new processes and gather requirements. If you're implementing a process that requires healthy data, make sure you allow time to identify data owners, do data clean up, and collect requirements. Document decisions that are made to avoid scope creep. If you're using [Now Create](#) to manage your project, the RIDAC (risks, issues, decisions, actions, changes) to store decisions as a part of the project collateral.
- **Include organizational change management (OCM) in your timeline** – Plan your support for communications and training as you set the project's timeline. Successful user adoption can hinge on how well you perform OCM. Visit the Customer Success Center for more resources on [OCM](#) and [training](#) to make sure you've identified how to best support go-live communications and user adoption.



Practitioner insight

If you're having trouble getting the executive sponsor or other stakeholders to address these items, give the scope and user adoption a yellow or red status in your weekly reporting depending on how dire you think the issue is.

5. How should we manage risk?

It's easy to be enthusiastic at the beginning of a new project, but don't allow yourself or your executive sponsor to gloss over potential risks in your eagerness to get started. Very few projects are completed without some issues. Successful projects have a plan to manage risks should they arise. Here are some ways to think about and plan for risks:

- **Brainstorm and document risk factors with your team** – Here are some common risk factors:
 - People changing roles or leaving the company
 - Organizational changes
 - Other projects running concurrently with yours that will divert resources and/or users' attention
 - Seasonal aspects of your organization, like retail, accounting, etc.
 - Seasonal aspects of your timeline: going live on holiday, summer vacations, etc.
 - Budget, scope, and timeline

– Dependencies on other departments: SecOps, integrations team, etc.

- **Use a risk register to track, manage, and prioritize risks** – You can use the RIDAC in the ServiceNow NowCreate methodology. There you can document the risk category, impact, priority, probability, severity, and state. Click here for a [RIDAC template from Now Create](#).

PROJECT RISK LOG												
Project Reference Number: <input type="text"/>			Guidance Notes Categorize and describe each Risk using "if" and "Then" statements. Estimate the probability and impact, which will calculate the severity. Once actions for mitigation have been confirmed, re-calculate the impact, probability and severity.									
Project Name: <input type="text"/>												
Project Manager: <input type="text"/>												
Project Sponsor: <input type="text"/>												
Describes the RISK if not MITIGATED					Describes the RISK after MITIGATION							
Risk Ref.	Category (Business Value, Scope, Resources, Schedule, Budget)	Risk Description (If.....)	Impact Description (Then.....)	Risk Probability (Absolute = 4, High = 3, Moderate = 2, Low = 1)	Risk Impact (High = 3, Medium = 2, Low = 1)	Risk Severity (Impact x Probability)	State (Pending, Achieved, Not Achieved, Avoid, Assign, Transfer, Accept)	Mitigation Action	Owner	Impact (High = 3, Medium = 2, Low = 1)	Probability (Absolute = 4, High = 3, Moderate = 2, Low = 1)	Risk Severity (Impact x Probability)
RSK001	Business Value			4	3	12	Mitigate			1	2	2
RSK002												

- **Make your executive sponsor aware of risks** – They might be able to proactively address some risks such as moving the go-live date away from a holiday, freeing up a resource, or increasing your priority with the SecOps team.
- **Create mitigation plans for each risk** – For example, a risk may be losing your developer if no one else in your organization can do the work. The mitigation plan may be to identify a firm with a contractor you might hire.
- **Manage the risks throughout the project** – Err on the side of caution in your status report, and put risks in a yellow or red status as they trend in that direction. It's better to be proactive about recognizing risks rather than hoping that they'll go away.
- **Continue to identify risks throughout the project** – During scrum and status calls, ask the team if they're aware of any new risks to the project.



Practitioner insight:

If your executive sponsor isn't receptive to acknowledging and resolving risks, take these three steps in addition to the regular status report:

1. Send them an email clearly outlining the risks and how they'll negatively affect the project.
2. Include a proposed mitigation plan that you need their help with.
3. Ask for a meeting in that email and work with their executive assistant or chief of staff to set it up.

Concluding takeaway

It's easy to focus on tactical tasks like creating a work breakdown structure or mapping all potential dependencies. The harder tasks—finding a strong executive sponsor, managing risks, and securing the right resources for your project—can be very time consuming and challenging. But you need to address these tasks proactively because they can become issues that are very difficult to fix later amidst the turmoil they can cause. When address these tasks properly, your project collateral will reflect that and provide the support you need when you need it.

Terms and definitions

CMDB – The [Configuration Management Database](#) is a data repository that contains all the assets and services managed by the company.

Additional resources

- [Executive sponsor engagement](#)
- [Now Create project methodology](#)
- [Organizational change management \(OCM\) planning](#)
- [Project charter template](#)
- [RIDAC template](#)
- [Value management for your ServiceNow investments](#)

Additional resources are also available on our [Customer Success Center](#).

If you have any questions on this topic or you would like to be a contributor to future ServiceNow best practice content, please contact us at best.practices@servicenow.com.

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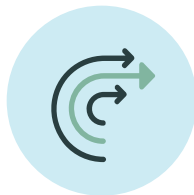


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