

Project Management for the accidental manager

Mounir A. Ajam



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Project Management

For The Accidental Project Manager



Project Management: For The Accidental Project Manager

1st edition

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The advertisement features a black header with the CMO Inspired Conference logo on the left, which consists of a green speech bubble containing the letters 'CMO' in white. To the right of the logo, the text 'INSPIRED CONFERENCE' is written in large, white, bold, sans-serif capital letters. Below this, in smaller white capital letters, is the date and location: '25 OCTOBER | DE VERE BEAUMONT ESTATE | OLD WINDSOR UK'. The main body of the ad is a collage of images: the top half shows a large, white, classical-style building with many windows, surrounded by green trees and a fountain in the foreground; the bottom half shows a collage of conference scenes, including a woman speaking at a podium, a man presenting to a screen, and a large audience seated in a conference room. At the bottom of the ad, a black banner contains the text 'Join Over 100 Chief Marketing Officers & Digital Innovators' in green.



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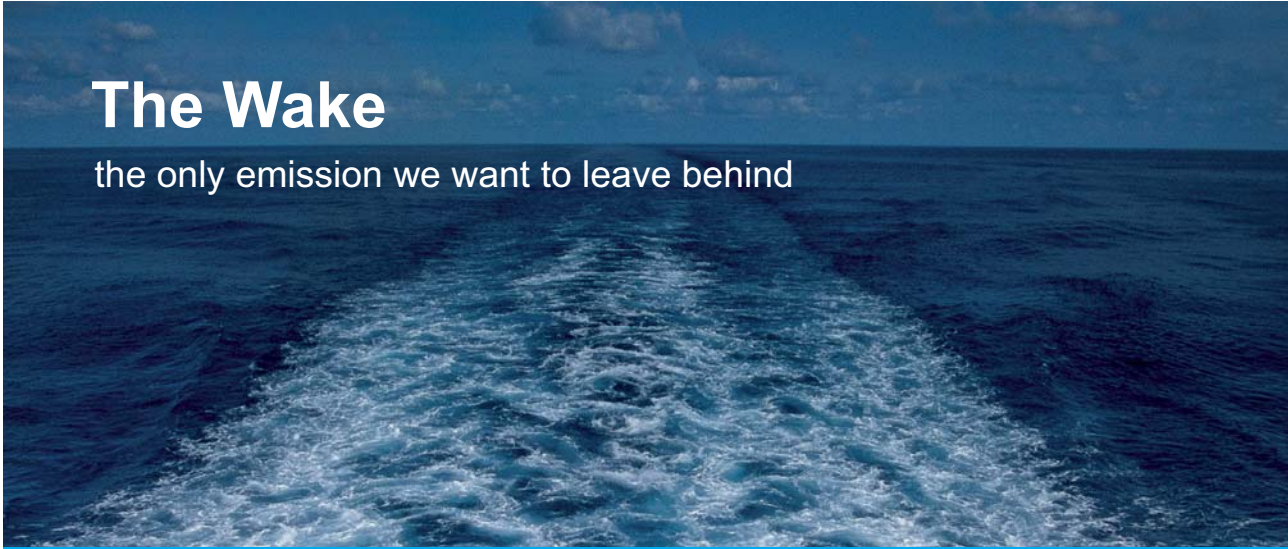
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Dedication

*To Sumer and Akkad:
This book and community center are for your future!*

Figures

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The Source of This e-Book

We publish this e-book as a derivative from *The Inheritance*, a book that we self-published in 2010 (Ajam, 2010). *The Inheritance, A Story about Friendship, Community, and Project Management* is the first book in a series on project management. Through *The Inheritance*, we explained a project management methodology¹ using a story telling approach in order to facilitate the understanding of project management knowledge to professionals who do not have prior exposure to project management.

In this e-book version, we have extracted most of the story and scenes and kept the chapters on project management. However, since *The Inheritance* included dialogues, we have kept some of the dialogues between the main characters. With this approach, one can understand the flow of information in an easy way.

In order for the dialogues not to be out of context, we will summarize the storyline and introduce the four main characters from *The Inheritance*. If the reader wants to enjoy the whole story, please refer to *The Inheritance*. It is available in print and e-book format.

Story and Main Characters

There are four main characters in the book; they are:

- Ahmad and George: young twin brothers from Lebanon
- Furat² (man) and his wife Qudss³ : a couple working in the United Arab Emirates

Qudss is a project management expert, course leader, and consultant. She met Furat when he came to her firm looking for a course on project management; he wanted to change or improve his career. They end up falling in love, married, and Furat joined the company where Qudss works; he works in marketing.

Ahmad is an accountant, and he is the serious type. His twin, Georges is lighthearted and always wanting to crack a joke in all scenarios. Their father passed away, leaving them properties. To honor their parents, they wanted to donate one of the plots that they inherited⁴ for community service. To achieve this goal, they decided to start a foundation to fund, build, and manage a community center. The center is the social entrepreneurship project⁵ that is the essence of the story, and e-book. *The foundation and center are the case study that we use to describe the project management principles and how to use them 'in the real world'.*

During a road trip, Ahmad and George had car troubles, became stranded on a highway between Saudi Arabia and the United Arab Emirates, and this was how they met Furat, who was driving along the same highway.

The couple, Furat and Qudss, and the twins became friends. Therefore, it was natural for the twins to seek Qudss help to start the foundation and build the center since neither of the twins knows anything about project management. Ahmad became the accidental project manager⁶ who manages this project⁷ and Qudss, the career project manager⁸ agreed to coach him and George, throughout the project. Qudss and Furat volunteered their services to help their friends realize their dream.

The Community Center Project

The story in *The Inheritance* is not fictitious. Many of the elements are from real life, although we twisted some roles and included some scenes from imagination to make it an attentive reading.

The inheritance (land) and the community center project are also not fictitious. They are not a reality yet, but the author has inherited⁹ a land plot that he has reserved it for such a project. Whether the author would be able to reach the full vision for the center as we explain in this e-book, or only parts of it, is not yet clear. Regardless, the project is proceeding starting with the launch of the foundation and already planning activities in support of this vision. Please refer to the end of this e-book for further reading.

Acknowledgements

The ideas, thoughts, and learning we share in this book have occurred over an entire career, so it is difficult at this time to remember all the people who have influenced this work, directly or indirectly. The people who have had a direct impact on the project management concepts and methodology behind this work, we have acknowledged them in another book that is currently in the publication process.

The following people have been valuable contributors to *The Inheritance* such as Ms. Nabila Aboumrad, Mr. Luc Bauwmans, Ms. Nada Chaban, and Mr. Ahmed Darwish (artwork – characters and scenes’ illustrations).

Concerning the Community Center Project (the real project), our sincere thanks go to my lovely wife, Nabila, for supporting this project and willingness to provide a plot of land to use for community development; my young children Sumer and Akkad who are eager to start participating in youth activities with the center. We acknowledge Mr. Mohammed Rezek and Ms. Manar Yazbeck, for their work on developing the idea for one of the strategic programs that the foundation will run. We extend a notable mention to Mr. Georges Khalil who is helping us in making the foundation and the center a reality.

Finally, special thanks to Mr. Houssam Fawaz for suggesting the name; the rest of the SUKAD team for their support, and Ms. Sophie Tergeist, of Bookboon.com Ltd, for making this e-book a reality.

Preface

The main purpose of writing this e-book is to spread the use of project management to a large audience. A wider audience from the project management community; reach out to professionals who are unfamiliar with project management. We believe project management is a giant that resides inside each of us, is an essential skill for work-related projects, and for life projects.

“How to discover that there is a giant residing inside each one of us regardless of our pursuits in life? How to awaken this giant from its deep sleep (hibernation), how to deal with this giant, tame it, refine it and utilize it in order to serve our personal and professional growth?” (Ajam, Giant, 2006)

Some of the answers to these questions are in ‘*Awakening the Giant Within*’, a professional paper we wrote in 2006 and the Project Management Institute (PMI®)¹⁰ published at that time. ***The Inheritance*** and this e-book build on that paper and offer an expanded and practical framework for awakening the giant.

Inspiration for This Work

Nabila, my wife decided not to continue with a full-time career, even though she worked for many years as an engineer with international companies in the United States and Europe¹¹. She worked hard as an engineer and did well, but with the birth of Sumer, first child, she decided to be a stay-at-home mom. Careers are not the only place where one can practice project management. We believe that one can use project management for many things, large and small, personal and professional. We are not saying every person must be a trained project manager, but exposure to project management thinking often inspires people to use its concepts to their personal life and hope this book encourages more people to do so.

I watch with interest the personal and coordination skills that Nabila uses in running life projects. I watch her maintain a balance as she supports us in the company part-time and takes care of the children, supervises their school activities and birthday parties, and tracks various family activities. It takes a good project manager to keep her eyes on the goals, and there are many small goals in everyone's life. Is not this what project management is about? How many professionals can manage multiple projects effectively? I'm not trying to show my beautiful wife as a superwoman, but is not she an example of working women and mothers? What can we learn from that?

We often see projects as large and complicated things, but it is essential to manage them as Nabila likes to say, one piece at a time. Then what appears to be a large project is suddenly a collection of various smaller pieces or goals. This may sound like an oversimplification, but is not the concept of Work Breakdown Structure about dividing projects into smaller, more manageable pieces?

We are not expecting that every reader of this book will become a project manager or learn to manage large, complex projects. However, we do hope one can learn how to manage one's own projects more effectively. We would like to see the *accidental project managers* improve on their success rates and reduce their stress and possible mistakes.

As we said earlier, our intention is to reach a larger part of our professional community. To achieve this goal, we describe the methodology by following the life of a project from conception to closure. The project we use in this book, is a **social entrepreneurship project**, the launch of a not for profit organization and community center, as we explained earlier.

In summary, our intention is to get as many people as possible to use the fundamental principles of project management in their own lives so they can do a better job of achieving their goals and pursuing their dreams. We want to help our readers achieve results and improve performance. The aim of this e-book is to **help one learn how to walk and take a few steps**. When one can walk and ready to run, we encourage you to discover more of the giant.

Finally, this e-book is for all who have dreams but are not sure how to achieve them. We hope that, through this e-book, you can sense the giant inside yourself, awaken your giant, and tame your giant so that it serves you on your quest toward your dreams. Before you know it, you can become the giant!
(Ajam, Giant, 2006)

The advertisement features a central graphic on the left with three stylized human figures surrounded by gears, all enclosed within a circular arrow loop. To the right, the title 'UNLEASHING CHANGE MANAGEMENT' is written in large, bold, blue capital letters. Below the title, the dates 'OCTOBER 18 & 19, 2018' and the location 'DE RODE HOED AMSTERDAM' are displayed in blue. The bottom of the ad shows a silhouette of the Amsterdam skyline, including a windmill and various buildings. In the bottom left corner, the text 'Global Executive Events' is visible.



Part1: The Project and Project Management

1 What is Project Management?

“Good evening. You must be the Giant¹²,” George says when he sees Qudss. “I did not know giants were so beautiful.”

“Thank you. That is quite charming,” Qudss responds.

“So what do you do, Ahmad and George?” Qudss asks.

“Ahmad is in accounting, and I’m in human resources,” George answers. “How about you, Qudss?”

“I’m in project management.”¹³

“What is that? Is that like the software people use in construction?”

“No, we do not sell software.”

“Then what is project management?” Ahmad asks. “From what little we know about it from our colleagues, we get the feeling it is for construction. Most of them work in construction-related fields, and they keep talking about activities and schedules.”

“Many people misunderstand what is project management. Many people think it is about software; others think it is only for construction. In recent years, more and more people think it is for information and communication technology. Project management skills are tremendously useful for all industries, and even for our personal lives. This is essentially the idea of awakening the giant that I mentioned briefly yesterday.”

“Sounds good. So what is it?”

“It’s about managing projects!” Qudss says with a smile.

“Qudss, you are saying the sort of thing I would say,” George answers with a smile. “Are you playing word games with me? I say what is project management, and you say managing projects!’ Forgive me, but you have told me nothing yet!” By now George is laughing.

“Managing projects is fun and serious at the same time. If I can define project management in two words, I would say it is a disciplined approach. If you give me more time, I can add more, but I must warn you, if I start talking about project management, you might not be able to shut me up.”

The twins smile and say in unison, “Go for it.”

“Okay, but remember, I warned you!”

“Yes, Madame Giant, go ahead.” George said jokingly.

“We’ll start with the short version, what I like to call *Project Management Thinking*. Let me ask you both, do you have goals in life?” Qudss asks.

“Certainly!” The twins reply.

“I need to find a wife for Ahmad so he will leave me alone. He is always attached to me, almost like a Siamese twin,” George jokes.

“Can we say that is the goal?” Qudss asks.

“No; marriage is not a current goal,” Ahmad says. “How about establishing my own business?”

“Fine, Ahmad, that is a good goal. Let us stipulate that as our project for now. Can we say establishing your business is a goal and consider it a project?”



“Why not?” Says Ahmad.

“How are you going to achieve it?” Qudss asks.

“I have not thought about it. Save some money, I guess.”

“Is that it? Do you think money is all it takes?” Qudss is trying to get Ahmad to think before she answers him.

“Okay, Qudss, I’m not sure. Like I said, I have not thought this one through yet,” Ahmad says, a bit defensively.

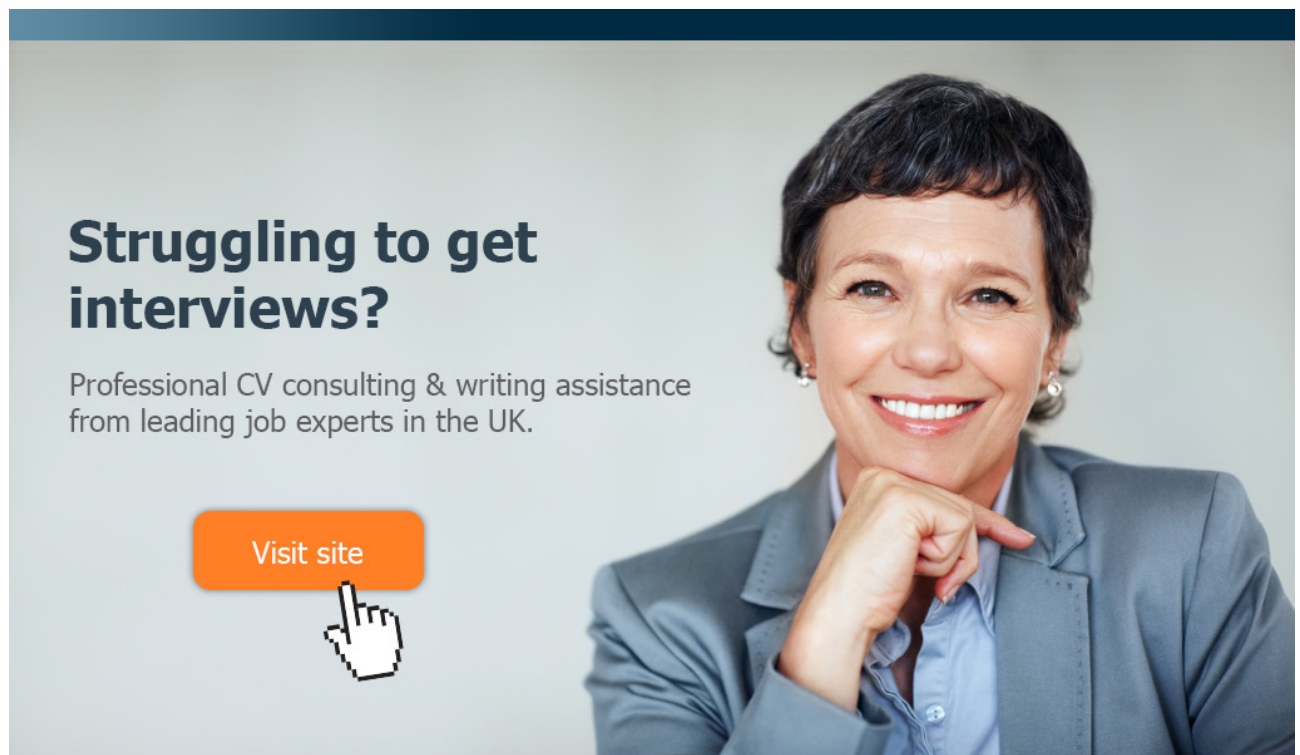
“Do not worry, Ahmad. It is no big deal, and there is no need to be defensive. You are learning. For discussion purposes, you have a goal, and a goal equals a project. Okay?”

“Okay!”

“The way we do this in project management is that you first define your goal clearly. It cannot be open-ended; it has to be specific and realistic. The goal can, and should be, challenging. You have probably heard that a goal must be SMART.”

“Is there a dumb goal, Furat?” George asks, pretending to ignore Qudss.


“I cannot say there are dumb goals. I do not like that expression. However, there are goals that are not SMART,” Furat responds. “SMART stands for Specific, Measurable, Action oriented, Realistic, and within a Time frame¹⁴. Opening a business is not a SMART goal. It is not specific enough.”



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“For your goal to be SMART, you have to be specific and include more considerations. Very early on, you need to specify what business, the ‘S’. Then can you measure what it will take to achieve the goal? I would think that once you describe it properly, then you can measure it, the ‘M’ in SMART. By the way, the SMART goal concept is not limited to project management; we also use in management and life.”

“The ‘A’ in SMART is for action oriented, meaning you can take actions to achieve the goal. You have the ability to make it happen; instead of waiting on chance or others.”

“The ‘R’ and the ‘T’ go together because a goal can be judged as being realistic when we link it to a time frame. For example, to say that you want to start a Falafel sandwich shop within a week would not be a SMART goal because it is not realistic to start even such a small business in just a week. On the other hand, if you say you want to open the shop in six months or a year, then we might be getting toward a SMART goal.”

“This is interesting, go on,” Ahmad says.

“Now here is the secret: once you determine the SMART goal and decide you want to make it happen, you can do one of two things. You either wish for your goal, which means that it may or may never happen; that is dreaming. The other possibility is that you can plan for it and actively pursue it. Planning is about the steps you must do to achieve your goal; the action in SMART.”

“Sounds good so far, what is next?”

“Once we have a good plan, we start to implement it.”

“I’m with you, go on.”

“We all know that when one starts to implement a plan, things might not go according to plan.”

“I expected that. What do we do in that case? Come to think of it, why plan if things do not go according to plan?”

“My motto is there is no need to plan, just go with the flow!” Says the spontaneous George.

Ahmad cannot resist, “Right, brother – go with the flow and be stranded in the desert!¹⁵”

Qudss brings the conversation back on track. “Planning helps you focus, and as you plan, you think about the alternatives. If we do a good plan, we also think about potential risks and one can plan for managing those risks. Planning will reduce uncertainty and increase the chances of success. Furthermore, as we implement the plan, we have to keep our eyes on the goal; as a result, we might have to take corrective actions every once in a while when the situation changes.”

“This is very educational,” Ahmad says.

“If you keep your eyes on the goal as you implement your plan, then there is a good chance you will achieve your goal. When you do, you owe us a celebratory dinner!” Furat interjects.

“Thank you for this enlightening discussion,” Ahmad says.

“And I thought it was all about software,” George jokes.

Qudss summarizes “I will leave you with this final thought: since we have not defined the term ‘project’ yet, let us do it now. Remember, a project must have a specific objective, or goal, and a timeframe. A SMART goal is equivalent to a project. Establishing a business is a project, but once the business is up and running, the project is complete, and we move from project management to business or operation management,”

“By the way, Ahmad, what business do you have in mind?” Furat asks.

“Nothing specific comes to mind right now, Furat. I just wanted to shift the project from a wife for me to something more businesslike,” Ahmad responds with a smile.

2 An Idea is Born

It is the middle of the night when the phone rings at Furat and Qudss house. It was George and Ahmad; minutes later they were at the door.

“We’ve got a job for you, Qudss.” Ahmad said.

“A job? But I’m not looking for a job.”

“You cannot say no to this job!”

Furat walks in with coffee and hears Ahmad’s statement. “A job? What job? And what’s so compelling about it that it cannot wait?” Furat asks, puzzled and a bit annoyed by this midnight visit.

“Okay, George, let’s tell them straight.” Ahmad cannot wait; he is itching to talk.

“We want to establish a community center, and this is quite complicated for our simple brains. An accountant and an HR guy do not know much about developing such a center. We remembered the dinner when you explained SMART goals and project management,” Ahmad says.



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“Where is this center?” Furat asks.

“Lebanon. It would be in our village, in the northern part of the country.”

“But AG, you know I’m happily employed here in Dubai, and this is home. Furthermore, because Furat and I both work here, I cannot manage a project in Lebanon.”

“Oh, come on, you can do this in your sleep. We have been checking you out, and from what we hear, you are one of the best consultants and project managers in the region. We did not come here only because of friendship, but also because we know you are good,” Ahmad explains.

“Thank you for the kind words, Ahmad, but I cannot manage a significant project remotely, asleep or awake! I do not know much about your project yet, but founding even a small community center could take a great deal of effort.” Qudss gave in to AG’s enthusiasm with a small sigh. “Oh well – Tell me about your project anyway.”

“You know we inherited land from our dad, and we want to use one of the properties, for the site of a community center. We do not have cash, but we have the land.”

“Furat, Qudss, we do not have cash, but we intend to establish a foundation and get donors to support the project. We can raise money from people and companies, establish the foundation, put a plan together for the center, build it, and manage it. Because we care so much about this initiative, I will be leaving Saudi Arabia and going back to Lebanon. I have found a job there that will allow me to be close to home to work on this project, but I know nothing about managing and we want to do it right.”

“I have the answer for you, AG!” Qudss says with a big smile. “Why not have Ahmad manage the project and George can help with public and stakeholder relations?”

“Qudss, what are stakeholders?” George asks.

“Stakeholders are those who would be involved or impacted by this project, such as potential investors, donors, the community, and others.”

“But I do not know anything about management,” Ahmad protests.

“You will not be alone,” Qudss continues. “You’ll have George helping you. What I am saying is that I think you, Ahmad, have a superb passion for this project so you should manage it. George is more of a people person than you are so he can help with the stakeholders.”

“Okay, but...”

“Let me finish, Ahmad,” Qudss says. “I’ll coach you through it.”

“Coach me? How?”

“I will guide you and explain the steps for you, but you have to do the work yourself. When you need me, you can reach me by phone or online.”

“That sounds appealing but is that enough? Cannot we both manage the project?” Ahmad asks.

Qudss addresses both brothers. “In project management there must be one project manager. George, you show a radiating passion that is ideal for the role I have described. With Furat in marketing and my experience in coaching and project management, we will make a good team.” She turns to Ahmad and says, “But *you* must assume responsibility for managing the project.”

“Fine – I can live with that. I trust you,” Ahmad says.

“Best of all, AG, you do not have to pay to hire us!” Qudss continues.

“What do you mean we do not have to pay?” Ahmad asks.

Qudss looks questioningly at Furat, and he gives a small nod. “We will volunteer!” She says. “It will be our honor to help you.” Furat agrees.

3 Project Management Is A Disciplined Approach

“Hi, Ahmad, ready for the first coaching session?” Qudss greets AG as they walk into the restaurant where she and Furat are waiting.

“Yes!” Ahmad responds excitedly.

“Okay, guys, lesson one,” Qudss begins.

“Actually, this is lesson two. We had lesson one when we met at dinner,” Ahmad says.

“You’re right, Ahmad. That is where I wanted to start. Remember our discussion on project management and disciplined approach? I have to be clear with you from the start: my intention in these coaching sessions is not to make you both expert project managers, but to give you the common-sense foundation you need in order to understand how to apply project management in a real-life situation.”

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“One of the myths about project management is the perception that it is too much control and a bureaucratic process. We disagree. However, if project management is ‘laissez faire,’ then its value is lost, and there is no real effectiveness. So neither of those scenarios is what we want. What we advocate is that project management must follow a disciplined approach, and that is possible, even though the approach should also be flexible. A disciplined approach is one where there are control points and a sequential process.”

“It is like when we were in school: behave yourself or the teacher will discipline you,” George says.

“George, keep in mind that the control points are not to discipline people if they do something wrong, but to help people avoid mistakes and costly oversights. Control points are there to ensure that we have:

1. Alignment of the project to the organization’s strategic objectives
2. Alignment among the client, executive management, line management, team members, project management, and other stakeholders
3. A proper plan for implementation and control
4. A proper plan for operation”

“With your project, you do not have an existing organization; you will be creating a new one. The focus for the community center project is the alignment of the various stakeholders to the vision of its founders. If the stakeholders do not have alignment, then how do we know that we are moving in the right direction?”

“What are these control points, and what sequential steps or process do we mean? The steps make up what we call the Project Life Span¹⁶, which consists of phases and stages. Each stage has one or more objectives that we must accomplish,” Qudss says.

“Along the project life span, there are control points. Think of them as gates or hurdles situated between the stages.”

“How many stages or gates are there?” Ahmad asks.

“It depends,” Furat responds.

“Let’s not get too technical here and worry about how many gates or stages there are. Let us say for now it depends on what we need for this project,” Qudss adds.

“Well, if the gates are control points, do not you think we should know how many we need?” Says Ahmad, unconvinced.

“You are right. Eventually we will know, but for now that is irrelevant. In any case, common sense will help us determine what we need. Remember, what is crucial, is to have what is necessary to maintain the disciplined approach; in addition, to ensure continuity of the project on the right track. We will explain the concept further in the future.”

“Okay, but it is still not quite clear,” Ahmad replies.

“Listen, Ahmad, have you watched a toddler learn to walk? When a toddler is learning to walk, and we want to encourage the little one, what do we do? We stand close by and invite the toddler to walk toward us. How close do we stand? That is a function of what we know about the ability of the child. Think of where you stand, as a gate the child has to reach before trying to go farther. As the toddler gains more confidence, we might increase the distance. If the toddler needs to walk across a big room, we do it in stages. We stand nearby, allow the toddler to reach us, then move back, allow the toddler to reach us, and continue until the objective is achieved. In that case, we could have three, four, or even ten gates.

“Now to go back to something George said. In project management, the gates are not to police; they are there to ensure that the team reaches the initial objective without missing crucial elements. If we see the team going in the wrong direction, as a toddler might, we can step in to correct the situation.”

“So the gates are to ensure that the team is going in the right direction?” Ahmad says.

“That makes sense,” George says. “But in general, what would be a reason, or a criterion, for a gate at a certain point in the project’s life?”

“We prefer to have a gate at every major step of the project. However, some gates are crucial and must be present in every project, while others might be optional or might not apply,” Qudss responds.

“Allow me to explain the importance of the gates. For example, would you allow someone to start building your center without ensuring that the design is what you want? Approving the design is a gate. Let us go a step back. Are you going to let an architect design the center without working closely with you to define the size and other requirements? Agreeing to the requirements is another gate.”

Ahmad nods in understanding.

“Let me reiterate: How can the architect decide on the size of the center or what facilities it should have? How does she know whether to design a 200-square-meter center or a 2,000-square-meter center?” Qudss continues, emphasizing the point.

“I see your point.” Ahmad says.

“Anyway, AG, in a minute I’ll draw a sketch of the project life span for you and include phases, stages, and gates. I want you to think about it for a while. Next time we meet we can start to talk about stage one.”

“Sounds like a plan,” George says.



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4 The CAM²P™ Model

“Okay, guys, here is the model we will follow for managing a project. It is something we developed internally but aligns to global standards and principles” Qudss draws on a sheet of paper as she explains the project management methodology that she and her colleagues developed, for which she was the lead developer.

The Project Phases

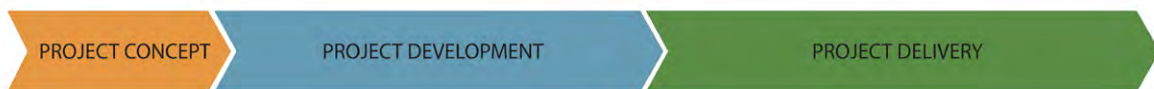


Figure 1: The Project Phases

“First, let me explain what I did not say earlier. A project life span lasts from idea to closure, from beginning to end. We will explain the PLS in steps. The first step is a high-level view. We will divide the PLS into three significant time periods or project phases, which are, Project Concept Phase, Project Development Phase, and Project Delivery Phase.

“First, we have the *Project Concept*. This represents the project’s initial phase and includes documenting the idea, accepting it, validating it, and initial project acceptance and authorization. Various stakeholders are involved at this stage, starting with the idea generator, who has to document the idea; management, who need to decide whether to proceed; and others who will perform the validation studies.”

“The next phase is *Project Development*. The project manager, supported by the project management team, starts to work on the various requirements for the project. They develop the project management plan and in so doing, define the project. This is where the team develops the concept into a workable approach that is acceptable to the main stakeholders, and that will result in the proper delivery of the project.”

“Finally, there is *Project Delivery*. This is when the project manager’s team starts to carry out the work that was, which one define during project development. The project manager guides the team as they undertake the planned work. The team’s main objective is to stay on track in accordance with the plan. In the model presented here, we show that the *Project Delivery* phase goes all the way to the end of the project, but other activities take place during this phase. We’ll explain those in due time.”

“Wow, that is a lot already!” Ahmad says.

“I know. Give me a few more minutes and then we will stop for the day.”

Expanding on the Phases

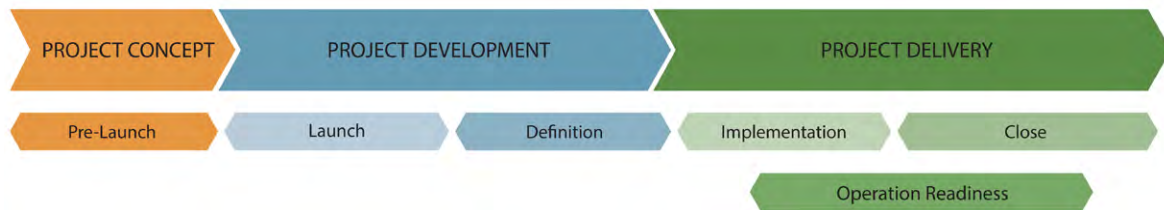


Figure 2: The Project Phases, Elaborated into Six Stages

“This second figure takes what we’ve already mentioned and expands on it, presenting the stages¹⁷ of the project life span. There is no major change from the earlier figure, but we elaborated the phases to discuss their related stages.”

“The project concept phase has one stage only, the project pre-launch stage. We use the term ‘pre-launch’ to reflect that the project is not yet launched or authorized by the organization, officially. At the end of this stage, if the various studies and reviews show the project idea is valid, then the organization’s management might decide to give it the go-ahead.”

“Next, we’ve split the project development phase into two distinct stages, project launch and project definition.”

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“Finally, project delivery incorporates the other components, such as the stages of implementation, operation readiness, and close. Implementation is doing the work and close is about completing, or closing, the project.”

“Notice that we show the operation readiness stage in parallel to project implementation and project close stages. We do this to indicate that the project requires significant effort by the operation team to get ready for the handover from the project team. Handover is an interface point between the team managing the project development and delivery and the team that will manage the end product that results from the project.”

“There is more, but we’ll save it for next time. Review what we have discussed. When you are ready for more, let me know, and I will e-mail you a more detailed picture than the one I drew here. Of course, this is not an exact representation of the life span of your project. Your project life span may look different since it will develop out of your project requirements. This is one of the reasons we use the terms ‘customizable and adaptable’ in the name of the methodology.”

“Once you review the e-mail and are ready for more, we can arrange another meeting or a video conference to go through the next steps.”

“Wonderful! A good plan.” Ahmad says.

Finally, the Full Model

Dear Ahmad,

In this figure, we expand from what we discussed during the last meeting. The figure is better than the one we drew by hand. Notice that I added stage gates (the shapes with numbers) and main deliverables (the upward arrows).

If you recall we had already discussed the stage gates., At that time, you were asking “how many gates”. As you can see in the basic model, which we present here, there are eight stage gates.

The deliverables are usually documents, reports, plans that we produce and have to present to management for review at the stage gate.

Before I forget, I know you said the project is a community center, but I want you to think intensely about that idea and try to write up some notes describing your vision for the center. That would be the starting point for discussion during our next visit together. To help you define your project, just think of SMART goals.

I also would like you to think of the big picture. The objective of the project life span is to show you a systematic way to go through the maze of project management from the idea (starting point – maze entrance) to project close (coming out of the maze).

Your friend, Qudss

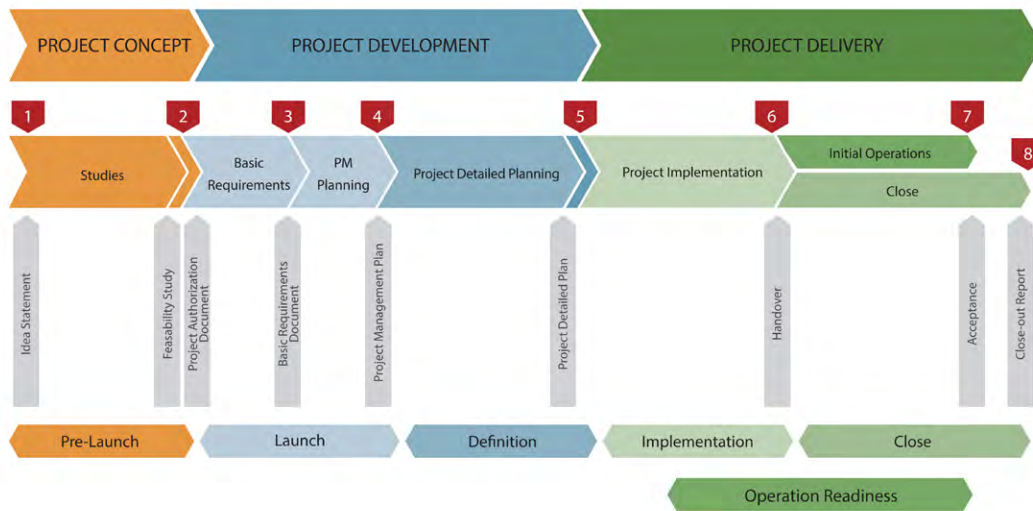


Figure 3: The Full Picture: Phases, Stages, Stage Gates, and Main Deliverables

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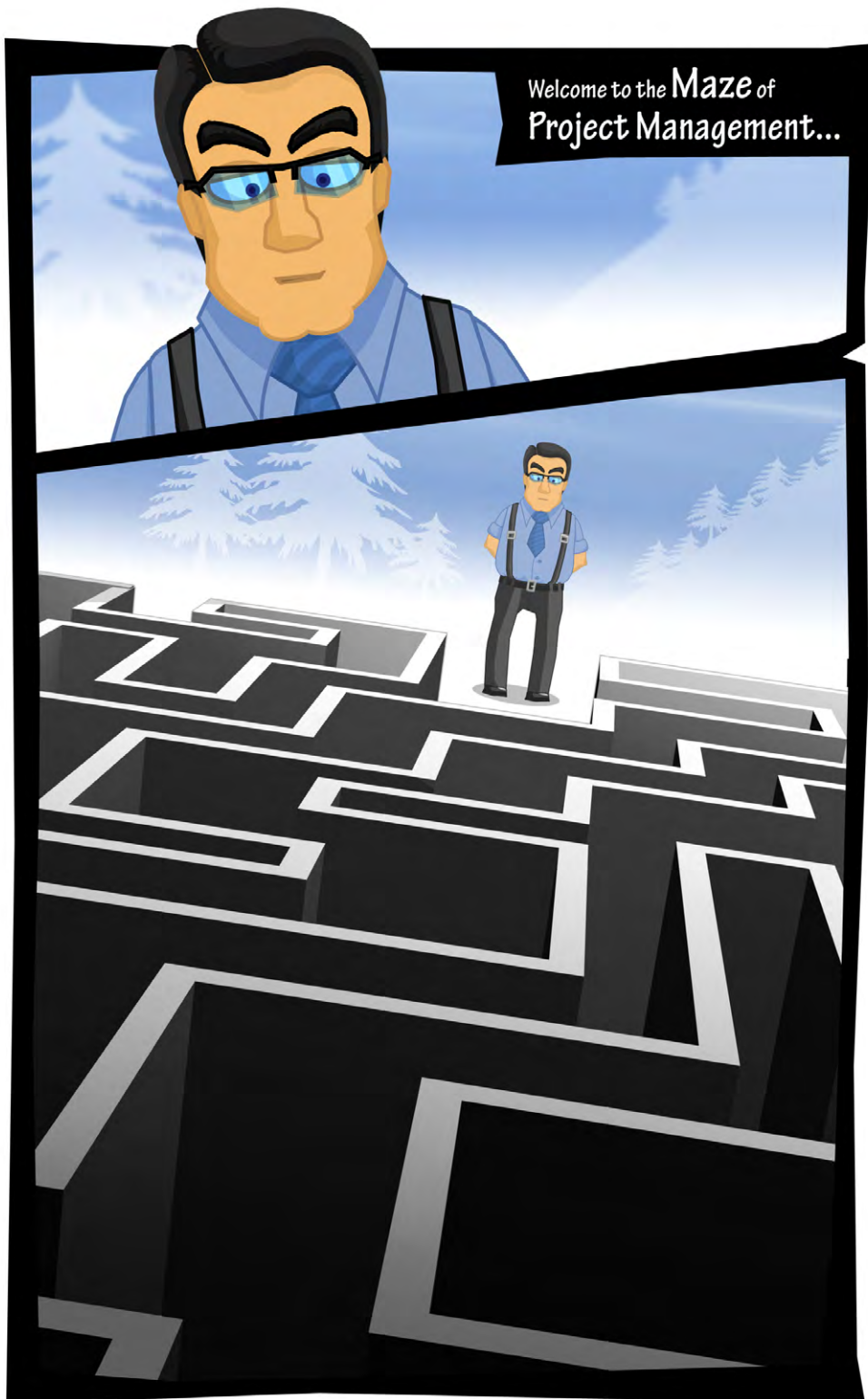
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Part 2: Project Concept Phase

5 Introduction to the Phase

“Hi AG. Qudss had to go on an urgent business trip, so I’ll work with you today,” Furat says when his friends arrive at his house.

“So, Ahmad, did you think about the project as Qudss asked? This is crucial, and what we discuss today will stay with us for the rest of the project.”

“Yes. I thought about this a lot, and it was much harder than I thought it would be!”

“I expected that. Before you explain your vision, let’s discuss the next few steps for the project concept phase, which is the same as the project pre-launch stage.”

“We call it ‘project pre-launch stage’ because we do not consider the project officially launched yet. It is only an idea under consideration.”

“The steps for the project pre-launch are:

Start with a clear discussion of the idea, written out.

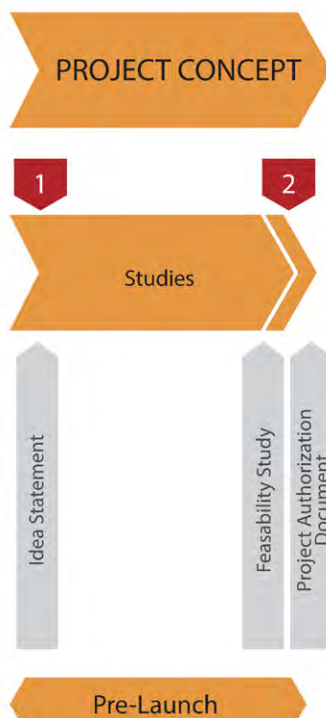


Figure 4: The Project Concept Phase

Next, after the idea presentation, the next step is stage gate 1. For your project, I am not sure if we need this stage gate, but we will discuss it. The main objective of the first stage gate is to decide if this project is strategically vital for you and your donors and investors.

Third, if you decide to proceed, we shift to our focus, which is to carry out a project feasibility study. The feasibility study will verify whether it is possible for you to pursue this idea.

With the study complete, it is time to go through stage gate 2, which is the initial project go/no go decision.

Finally, if we decide it is a go, then we move ahead to develop and issue the project authorization document (PAD). This will announce the official launch of the project to the organization. In your case, there is no organization yet, but the PAD is still relevant and should be done.”

“Okay, this is a reasonable process. Some of what you said is still a bit fuzzy for me, but I’m sure you will clarify it in due time.” Ahmad responds.

“Great! Let’s get started.” Furat says.

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6 The Idea Statement and Initial Approval

The Project Vision

“It is time to explain your idea, Ahmad,” Furat says.

“My vision is to establish a community center to serve the general community in our area. The center will be a collaborative effort, a cooperative. The center will provide services through volunteers and community members helping one another. People will get services from the center, and in return we expect them to provide services themselves, based on their skills and abilities.”

“The center will function as a service coordination agency, with the services delivered by the community members for the community members. In case, there is a need for unique services, and local expertise is not available, then the center will work toward sponsoring those services. We hope to emphasize education at all levels.”

“That’s clear so far, and usually this would be more than enough, but in your case, since this project is unique and you need the support of others, I suggest you elaborate further on the services received and rendered,” Furat says.

“Services could be anything from tutoring school children to providing financial advice and family planning. It could be professional training or consulting to support entrepreneurs in launching their businesses. It could even be physical work, such as repairing a house or tending a garden. Maybe a high school student needs tutoring in math or science so they can get that for free, but in return they might help by fixing things in the house of an older couple,” Ahmad explains.

“We have the land where we want to build the center. As you know, Ahmad and I will be donating that to the foundation.” George responds. We’ve discussed this project with some influential people in our community, and they’ve indicated a willingness to support it, but they need more information about the center before they make a commitment.”

Ahmad continues, “To make the center a reality, we need cash to build and furnish the facility. We hope to get some of the work done on a Pro Bono basis.”

“Ahmad, have you thought about the need to establish a management system and structure once the center is operational?” Furat asks.

“Not really, but we know we will ultimately need to do it.”

“That is okay. We do not need to discuss the details now, as long as you recognize we’ll need to address this in the future,” Furat says.

“We need to have a clear definition of the services we plan to offer through the center, and we will need a good volunteer management system; because the center is to be volunteer-driven. We also need to ensure that we have cash reserves to handle the center’s financial requirements for two years to ensure uninterrupted service. Within those two years, we must have a process established where we would become self-sustaining.”

“Ahmad, I am speechless. You have a good handle on what has to be done, and I must say I admire you for this initiative.”

“Hey Furat, what about me? Did you forget that I’m a part of this?” George jumps in.

“No, George. I know that your role involves talking to people, donating the land, and working together with Ahmad. It makes me proud to be involved with you in this project, and I have no doubt of the value you add to the project.

I think if you all do this well, it could be a model for other communities that want to launch their own centers. I have no doubt it will succeed.”

Idea Approval

“Okay, AG. Now that we have clearly defined the idea, the next step is a tough one. If we were in a company, then executive management would be reviewing your idea to decide whether it is strategically in alignment to the organization’s objectives. Because we do not have an organization, and we do not have investors or donors committed yet, then it is up to you. Do you want to commit to the project? Before you answer, there are a few things to keep in mind.

First, this will require a vast deal of time, almost as if a full-time job, and you already have jobs you need for income.

Second, dreams and reality do not always come together, hence the need for concept validation and proper planning.

Finally, some donors or investors might pull out, leaving you stranded with unfinished work and possibly a damaged reputation.”

George was the first to speak. “Furat, we had similar concerns, and it is scary, but we want to go ahead and take on this challenge. Ahmad and I have talked about this many times, including with friends and family, and we certainly see an absolute need in our community for such an initiative. We are willing to take the risk to pursue it. What’s essential for us is for you and Qudss to help us do it right.”

“I can speak for Qudss and myself, and we will do our best. Because you are willing to go ahead, we think we should continue with the project pre-launch stage. Some time before we go into the project definition stage, we need to ensure that we have some serious commitments from donors, individuals, and organizations.

“Let us stop for today. Qudss and I will discuss this further. We will email you some suggestions on how to conduct a feasibility study. Once we have those results, we will meet or video conference again.”

“Sounds like a plan,” Ahmad says.



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7 Validating The Concept

Dear Ahmad,

As promised earlier, in this long email we will share with you some ideas about the feasibility study, and what you should be doing over the next two to three months. You must remember that your magnificent idea might not be feasible, and we do not want you to discover that after you have spent money. We do not want you to risk damaging your reputation among the people who trust you and donate their money to your dream. Therefore, it is essential to conduct a feasibility study¹⁸ to validate the concept and ensure that the community center can indeed be a successful project.

To help you with this mission, here are some things we want you to consider. You might want to consider hiring a specialist to help with this work. Ideally, and in the spirit of a project with a focus on volunteering, a company might be willing to do some or all of a feasibility study on a Pro Bono basis.

One more thought before we explain the feasibility study; remember when we talked about SMART goals? The vision you explained earlier is the goal definition. Now it is time to be specific – the ‘S’ in SMART. The feasibility study is our first action to see if the goal is SMART by validating the idea. Is the idea realistic (‘R’)? Can we achieve it within the timeframe (‘T’) we are considering? Later, we will talk about basic requirements. Basic requirements help us deal with the ‘M’, or measuring. Further, we will list the completion requirements and project success criteria. When we get to project management planning, we will work on ‘A’, the actions required to achieve the goal. As we finalize the PM Plan, we will need to test it against the SMART criteria again.

Technical / Technological Evaluations

One of the first questions to answer in feasibility studies is the technical or technological requirements for this project. We do not expect any issues with the community center, but we want you to think about this: Do you want to have a technologically advanced center with a great deal of automation and control for the various components, from lighting to the gardens, or would a standard design be satisfactory?

Financial & Time Considerations

Financial and time considerations are significant issues for you, and they require quite a bit of time to determine. Here is what you need to consider.

1. Once the center is operational, do you plan to have any revenue-generating activities? We think the answer is yes because you said you wanted the center to be self-sustaining within two years.

2. You need to have a good estimate of the cost for the facility and operating costs for two years in order to determine your financial requirements.
3. You need to get serious commitments from potential donors and the amounts of money they plan to donate. However, keep in mind that many people will not be ready to make a commitment unless they see significant progress. They want to be sure that you are serious about the project.

People Requirements

When it comes to people, you need to keep several things in mind.

1. There are no employees so far. Can you hire some to help with the planning?
2. This might be a perfect time to get George cranking. He can chase companies that provide services related to your requirements in launching the center, from design to construction to furniture.
3. You will need other people and professionals to be involved as the project progress but no need to discuss at this time.

Market Evaluations

Because this is not a commercial venture and you are not manufacturing or selling services or products, commercial market evaluations such as pricing and competition are not relevant. Marketing is essential, though because you need to know that the services the center provides are what people need. The last thing you want to do is to put an enormous deal of energy into this, solicit people to commit their support, and then have no one use the center. That would be quite damaging for you and everyone involved.

We strongly recommend getting a company to help you with market research. We have contacts at your local university. If you like, we can approach them. Perhaps one of the professors would get his class to do the market research.

Location

The location is set by the donated land, but you should be open to other possibilities. You might want to sell the land and use the money to buy another property because it is in a more suitable location or because it is a better size, smaller than your large parcel of land.

Legal/Regulatory Considerations

There are various legal questions to ask, and a good lawyer can answer most of them. You do not need to register the organization or work out all the details right now. You just need to know that what you plan is legally possible in Lebanon. Here are some considerations.

1. What are the legal and regulatory requirements for launching a community center?
2. What is the law regarding not-for-profit organizations, especially donations and taxation?
3. Are there any benefits from the government for individuals or organizations making donations? Are there any tax breaks?
4. What are the government's requirements regarding legal representation and financial statements? Can you find any one do deliver these services on a Pro Bono basis?

Other Considerations

We cannot list every possible consideration at this time. We have tried to cover the main ones. Here are a few other things you might want to find out.

1. Are there are any other similar community centers in Lebanon?
2. Does the government have any programs that might support your initiative?
3. Is any support available from international organizations or nongovernmental organizations (NGOs)?

Please start working on the above. If you need help in the meantime, let us know. Otherwise, we will talk when the reports for the feasibility study are ready.

Your best dear friends,
Qudss and Furat

Dear Qudss,

Message received and appreciated.

George and I have our work cut out for us – this is truly exciting. We never imagined there would be so much work when we decided on this project, but now we understand your earlier warnings. I must say that you are making things quite straightforward, and we know for sure that we could not have done it without you. We genuinely appreciate it.

We like the university idea and that will be our first step. George is going to be home on vacation next month, and we will go to the university to discuss this project and seek their help. We would appreciate it if you could make the initial contact to introduce us.

Thanks...

Ahmad

8 Authorizing The Project

Hi Ahmad,

I have reviewed the university's feasibility study, and it looks good. Some of the things they wrote need to be elaborated on in future documents, but it is a terrific start.

I have hesitated before sending you this email because the next step after deciding to proceed is to write a project authorization document (PAD) to authorize the team to proceed to the next stage. However, because there is no formal team or an organization yet, I am not sure if you need to do this. I still suggest you write a PAD anyway, and I will give you some points to include. That would help you document where we are, and it one can use later to guide the team on the vision and mission of the project.

Here are the items you should consider including. Keep in mind, all you need is two to three sentences per topic – do not write a book!

Project Description

The project description should be a repeat of the idea statement. Three to five sentences describing your vision for the community center would be enough.



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Project Justification

You can also use the idea statement to derive the project justification because it is about the purpose and objectives. Just write down why this project is necessary and how it can benefit the community.

Location

That is the land you have.

Time and Cost

The feasibility study showed that the building space requirement is about 500 square meters, which would require \$150,000 for the building. As a rough approximation, let us double the amount and say you need \$300,000 to cover the building, basic furniture, and outdoor facilities.

Other costs would be the management system and operational requirements for two years. You plan to depend on volunteers, but assume that the center manager will be a paid position, along with some staff for cleaning, gardening, and security. So let us assume \$50,000 per year or \$100,000 for two years.

Our estimated financial requirements are roughly \$400,000. Keep in mind that this is a rough estimate, and the actual costs could be quite different.

Time wise, we think this is a two- to three-year project from the PAD until the center is open to the community.

Project Manager

You are the project manager for now, and it would be a good idea to confirm this later with donors and stakeholders. A donor might come and ask to co-manage the project with you in return for a nice donation. Refuse the co-management idea; there must be only one manager. If you think this donor might be better at managing than you are, then consider stepping aside and taking another role. If you are more qualified, you need to convince him or her of that and offer another position. If you wish, you may explain my view on *one* single point of contact for a project.

Assumptions & Constraints

What are some assumptions on this project at this time, and what are the constraints? Obviously, one humongous assumption is that there will be donors and that the university will continue to participate. Can you think of any other assumptions?

Do we have project constraints? Cash could be a challenge, but it is too soon to determine this.

Major Risks Identified

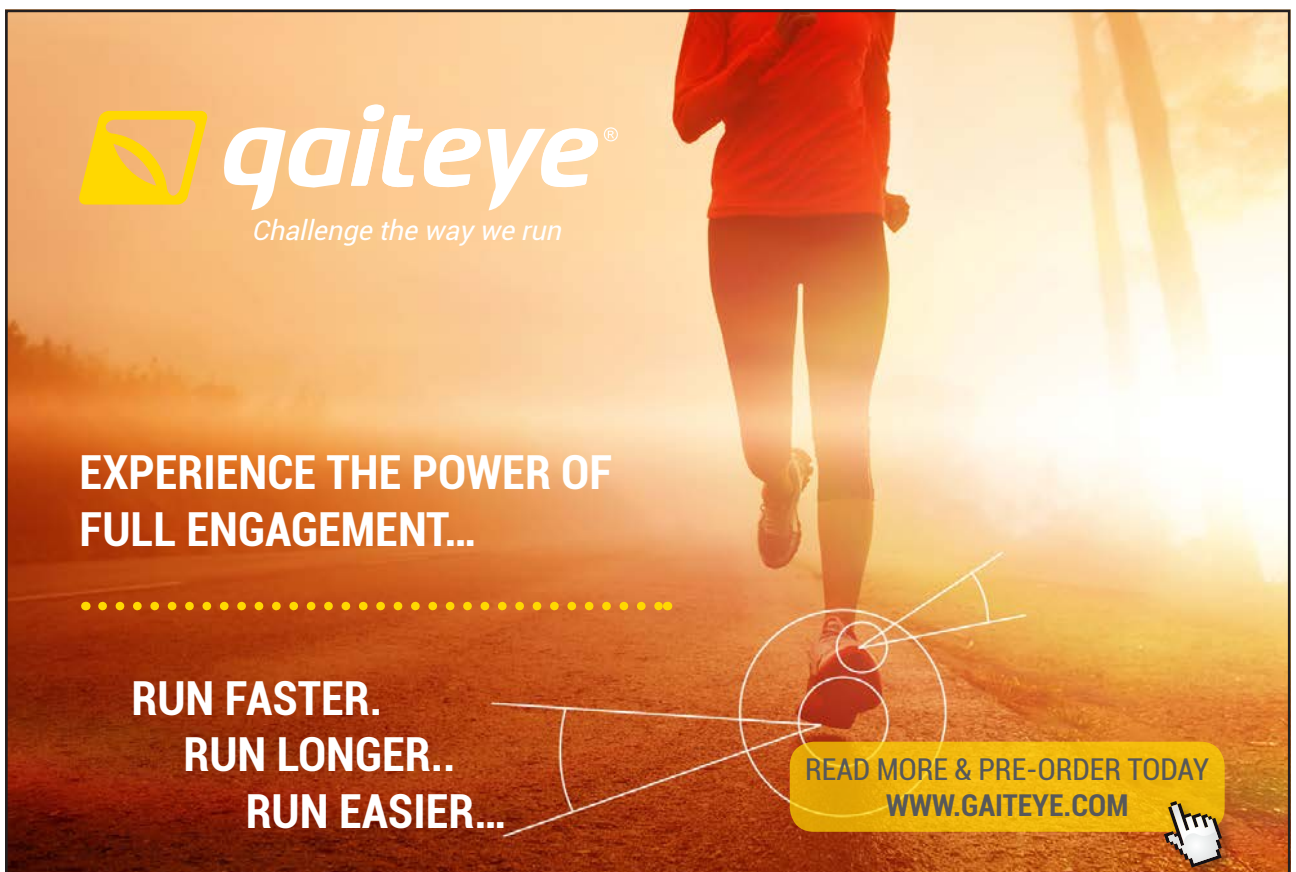
Have you thought about the project principal risks? We will revisit this and the other topics, in more detail later.

Stakeholders

This item is fun! Who are the various stakeholders do you expect to have on this project? Write them down; keep in mind that stakeholders can be individuals or organizations.

With the above, you have a guideline that we can follow and refer to in the future.

Regards,
Qudss



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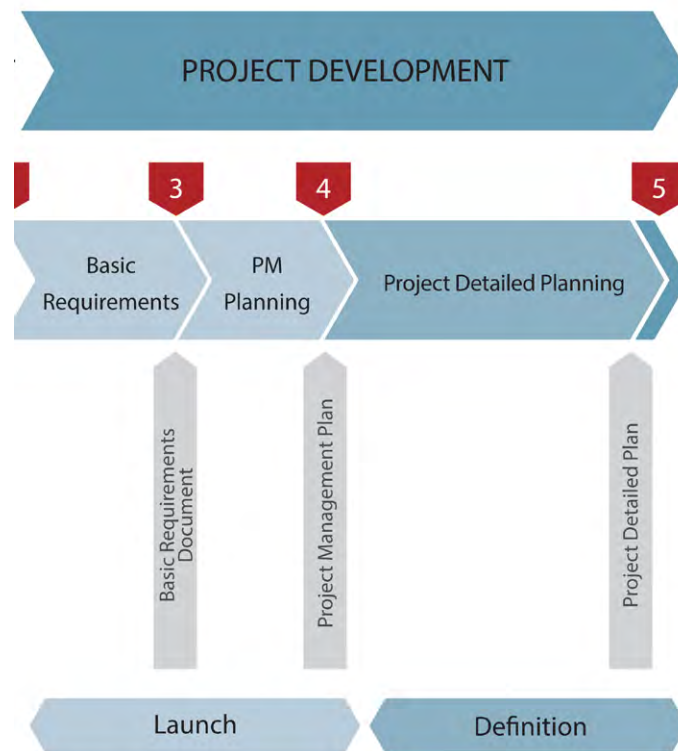


Figure 5: The Project Development Phase

9 Project Requirements

Visiting Friends

“Hey, Furat, Qudss, we’re here!” George jumps and waves when he sees his friends. A few minutes later, they were in the car.¹⁹

“It’s a beautiful country, AG. Thank you for inviting us,” Furat says while enjoying the views of mountains on one side and sea on the other. He was anxious to see as much as possible, hoping the road never ends.

“Today we will rest and show you our village. Tomorrow we will start the tour,” Ahmad says.

A Fresh Morning

Early morning, with breakfast done, the friends head off on a long walk to the land where the center will be. Qudss takes the opportunity to start a new coaching session as they stroll up and down the village streets, greeting friendly passersby.

“Okay, Ahmad, with the project going ahead, we are done with the pre-launch stage. It is time to move into the project launch stage. This stage is in two essential parts: establishing the basic requirements and developing the project management plan.”

“Sounds good, I am ready,” Ahmad says.

“Qudss, what’s going on? Are not there any police this time? And where are the gates?” George jokes.

“Good catch, George. I was waiting to see if you have learned anything. The gates will always be there, just to make sure you do not get in trouble. There will be a gate after basic requirements and another gate after the project management plan. The first one may be just a formality, but the second will be crucial to the project.”

Basic Requirements Overview

Assume we are working in a company, for discussion purposes. The project authorization document (PAD) was the last thing Ahmad did in the previous stage. In an organization, issuing the PAD would be the executive management communicating to the project manager that the project is a go. This document authorizes the project manager to proceed.

“Okay, understood.”

“For the community center, Ahmad wrote the PAD representing executive management, but it was also Ahmad who received the PAD, wearing his project manager hat. The project manager typically reviews the PAD and researches the organization’s corporate knowledge databases²⁰ for past project information and lessons learned. Based on all this, he starts to define the basic requirements for the project.”

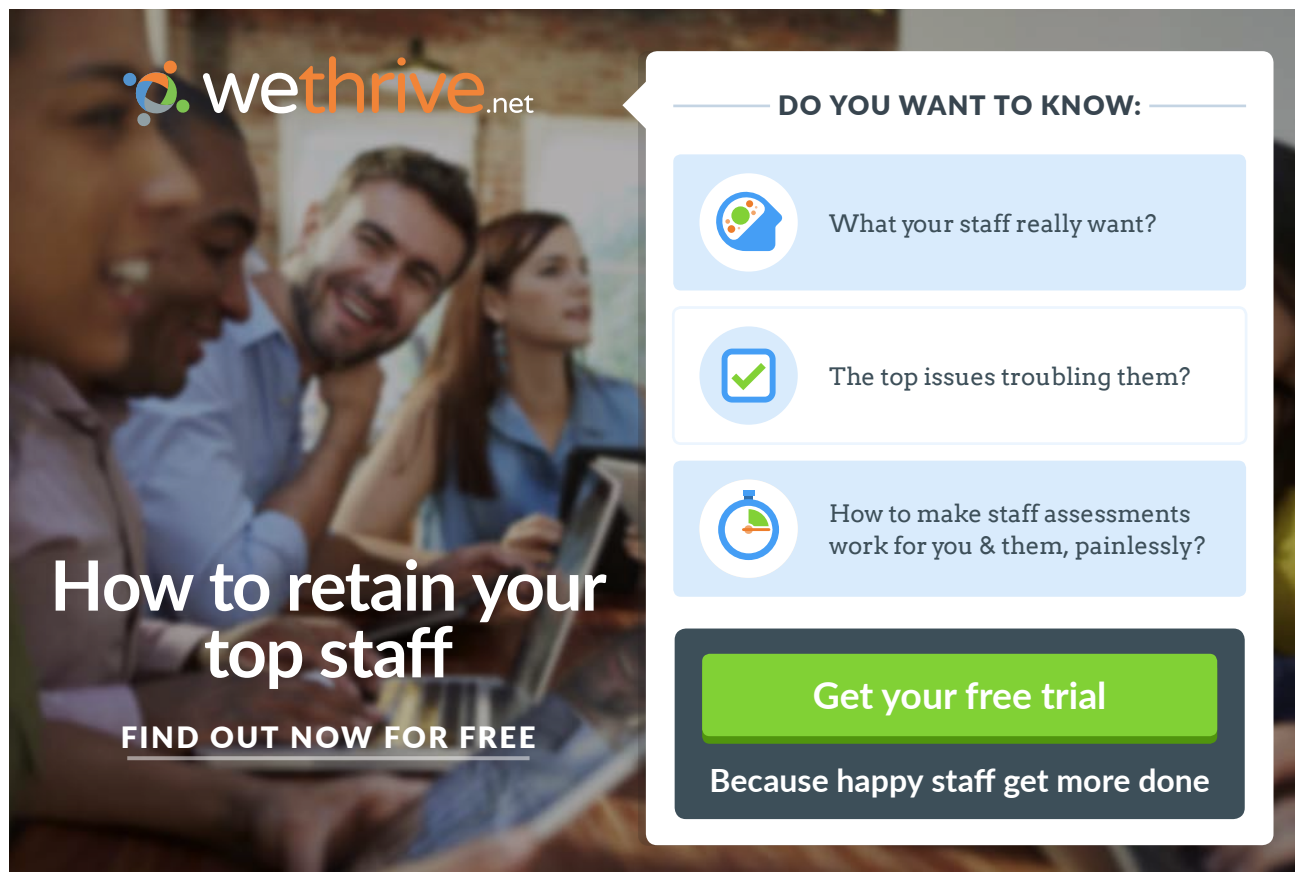
“Okay, there are two hats.”

“Let us say one hat is the sponsor and the other hat is the project manager.”

“The project manager will now have to develop the basic requirements for the project.”

“Qudss, this sounds good, but so far you have not told us what you mean by basic requirements. Are not the basic requirements the description of the project, which we have already done?” Ahmad asks.

“No. The description of the project was limited to *you want to establish a community center to provide services*, but we have not defined the services in detail or verified the size of the facility, nor did we define the management philosophy or management requirements for operating the center. So how could a consultant or an architect design the facilities for us if we do not define all the requirements?”



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“Ahmad, one fundamental concept that we have not explained properly in past sessions is progressive elaboration. Project management literature, including the PMI® *Guide to the Project Management Body of Knowledge*, views progressive elaboration as the act of expanding the definition and details of the project scope and requirements as we advance into the later stages of the project life span.

“In other words, at the time you conceived and presented the idea, you had the concept in mind, and it was not highly detailed. As we conduct studies and start to define the project, we have access to more information, so the project description and details expand. In that regard, we used your vision to outline the idea. From the feasibility study, we determined that the center will be 500 square meter, but that was a rough calculation. As you will see later, once we start working on the requirements and defining the project, the size might change,” Furat says.²¹

“Thanks, Furat. You are right, we did not explain progressive elaboration. Ahmad keep in mind that the basic requirements are particularly pertinent because they detail what you want for the center. You are going to share that with supporters and donors for the project in order to gain their final commitment,” Qudss says.

“Here are some of the things you need to consider. This time we’ll help you define the requirements, not just tell you what to do.”

“That is great! We appreciate it – plus you will save us some time.”

Description of the Center

“The next step is to describe the center as we did before, but begin adding details. What do we know already?” Qudss asks.

“We want to have a community center to benefit the community in this village and neighboring villages,” Ahmad says.

“Okay, George, what’s missing from what Ahmad said?”

“What services do we plan to offer?”

“Correct. What do you intend to offer?”

“We will offer counseling on issues such as family planning, conflict resolution, farming, education, financial planning, among other topics.”

“Right. We will need one or two dedicated rooms for this service. Maybe one is enough because some counseling can take place in offices or even on the grounds of the center.”

“In the survey we did,” Ahmad says, “some people in the community requested a first-aid station or a mini-clinic with a nurse.”

“Then we need a dedicated room for the clinic, ideally with a private bathroom.”

“People want a chance to come and spend evenings there, especially to keep teenagers off the street.”

“In that case, we will need a game room, maybe with a chess table, a billiard table, and table tennis. A television and VCR/DVD would be good as well,” Furat adds.

“Then this game room would have to be large enough to allow a group to hang out in, but with enough space to allow freedom of movement without disrupting one another – or have two rooms,”

“Some people asked for a kitchen so they could have small parties and events there, or even fund-raising dinners.”

“Great idea! Then you need to have a large, well-equipped kitchen.”

“That sounds good. Okay, now the outdoors – ” Ahmad begins.

Qudss interrupts. “Wait a minute! Before we go outside, what else do we need inside?”

“I am not sure, Qudss.”

“We need an office for the manager, space for an assistant, and a file room for a copier, fax machine and whatever else. We also need a storage room for extra tables and chairs if we want to hold events.”

“I guess so – I did not think of that.”

“Let us stop here with plans for the interior, but as you guys write this out later, make sure you refer to the university’s community survey to find out what we might have missed,” Qudss says.

“We will. Are we ready to discuss the outdoor facilities?” Ahmad asks.

“Yes – let us do it,” Qudss responds.

The Outdoors

“That is easy. We need a football field, a tennis court that can double as a basketball court, and a volleyball court,” George said quickly.

“What else?”

“Families like to have a children’s play area with water features, like a small creek, a fountain, and a wading area where they can cool down in the summer;”

“Good. Let us add fencing, and we need to provide on-site housing for the security guards.”

“How about a small garden with benches?”

“Great idea!”

“We might want a small area where the security guards can plant some vegetables. This will add some greenery next to the security building and allow the guards to grow some of their own food.”



The advertisement features a black header with the CMO logo (a green speech bubble) and the text "INSPIRED CONFERENCE" in white. Below the header is a photograph of a large, white, classical-style building with a fountain in the foreground. The bottom section of the ad shows a collage of images: a woman speaking at a podium, a man presenting to an audience, and a group of people in a meeting. At the bottom of the ad, the text "Join Over 100 Chief Marketing Officers & Digital Innovators" is written in green.



“That reminds me – the university has an agricultural school, and because the land is large enough for the community center, and plenty of space around it, they asked for an area at the edge of the land that they can use for their experiments with different plants and irrigation systems.”

“Outstanding! That way you can enhance the relationship with the university and its students and at the same time make the center an active place. That will help bring people in!”

“AG, excellent work! We have defined the requirements for the indoor and outdoor spaces. Did we miss anything?” Qudss asks.

“No, I think we are done,” Ahmad says.

“Not yet,” Furat interrupts. “Maybe we have covered the facilities, but there is something very important we have not discussed yet.”

Operational Requirements

“What did we miss, Furat?” Ahmad asks.

“The operational requirements for the center,” Furat responds.

“What do you mean?”

“How are you going to manage the place? Who will manage it? In the past, we have talked about having few or no employees because you want to rely on volunteers. So what type of volunteers, and who is going to organize them?” Furat asks.

Ahmad says, “Good questions. Okay, guys, this is the land.”

“Wow, it is beautiful! There is a magnificent view of the mountains! Are you sure you want to donate this land? It could be worth a small fortune!” Qudss says.



“George and I know that. Actually, we had a good offer on it, but we refused to sell. This is our parents’ hard work, and we want to honor them by using it for a good cause,” Ahmad responds.

“AG, you guys are remarkable. Let’s take a break, and then you can show us around the land,” Furat says.

“And we can sit down under those lovely shady pine trees and talk more. The next topic is operational requirements,” Qudss adds.

The High Level WBS

“Qudss, before we talk about operational requirements, I suggest that we develop a WBS.²² That will help clarify the big picture so that AG can visualize the basic requirements,” Furat says.

“WBS? Who is that?” George asks, puzzled.

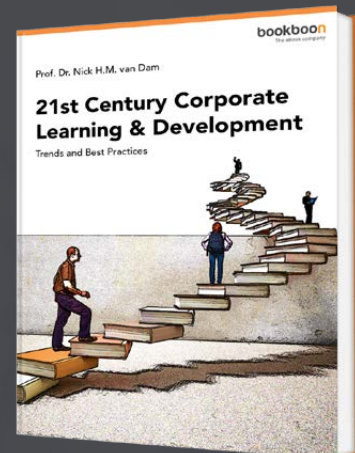
“It’s not a ‘who,’ George. A WBS stands for Work Breakdown Structure. It is a hierarchical graphic representation of the project scope. What we want to do is break down the project into smaller and smaller pieces, so it is easier to understand and manage,” Qudss explains.

“Sounds good. Here’s a paper and pencil,” Ahmad offers.

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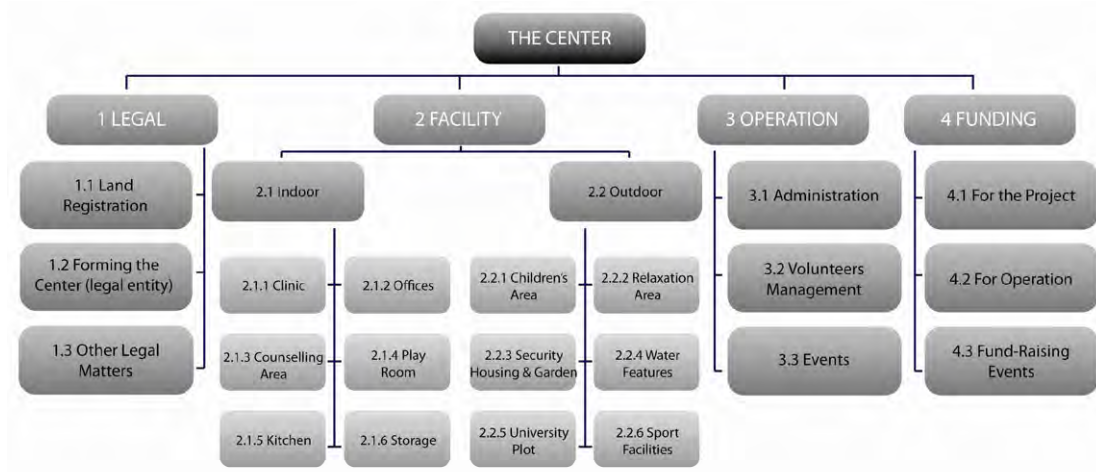


Figure 6: The Project Initial Work Breakdown Structure (WBS)

“Thanks. Okay, the drawing is self-explanatory, but, please ask if something is unclear,” Qudss says.

“This does not include everything, but it is a good start,” Furat clarifies.

“Did you notice that as we were talking earlier, we did not discuss funding or legal requirements? We had forgotten about them, but when we started the WBS they came to mind,” Qudss says.

“Okay. Should we start to work on the details for all those things?” Ahmad asks her anxiously.

“No, not now. You do not want to spend a lot of time on details until the project is approved, and we are not there yet. The drawing defines the key requirements as you will be discussing them with the stakeholders. We can develop details for each of the boxes later, during the project definition stage.”

“In that case, what’s next?” George wants to know.

“Ideally, we want to review the WBS with management, but because there’s no management, why do not you call a meeting with those who showed interest in the center. I hope you can schedule the meeting while we’re here in Lebanon so we can be there to support you. That will give us a chance to work together on the project management plan so that we can present it along with the requirements,” Qudss says.

“Sounds good, will do,” George says, already planning the meeting in his head.

“The main objectives are to seek people’s input and ideas, to get serious commitments for cash or services. This is vital because the next phase of the project is more than you can handle on your own. We will need specialized firms,” Qudss elaborates as they start their walk back.

10 Project Management Plan

“Qudss, we are ready for your wisdom on the project management plan?” George calls for his friend since the other were waiting on the balcony enjoying the afternoon sun.

Qudss joined them. “Hi, AG. While we are sipping our coffee, you two look at this. It is a standard template for a project management plan. Do not worry; we’re not necessarily going to talk about all of it this afternoon.” Qudss hands each of them a form.

“This is good, but I do not understand some terms. What are *value improving practices* and *procurement strategy*? What does Q/SHE stand for?” Ahmad asks.

“Do not worry about them for now. In due time, you will learn all you need to know and more,” Qudss responds.

“Then let us get to work,” Ahmad says. He has been enjoying these sessions and learning quite a bit. As an accountant, he had to examine details, but the project management concept is helping him see the big picture.

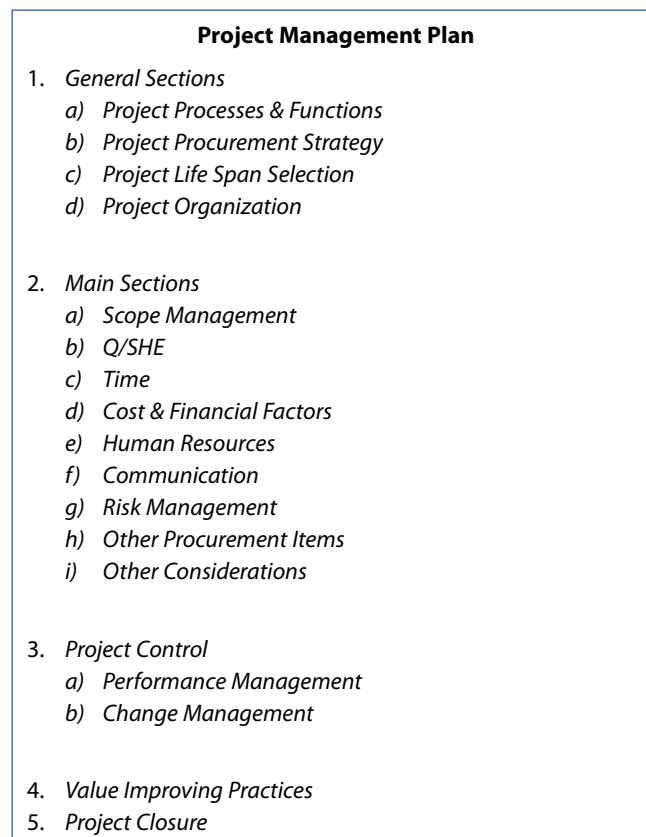


Figure 7: Project Management Plan Outline

“The project management plan is about strategy, and in basic terms it is a reflection of our thoughts on what should happen between now and the time the project is complete. With this project, that means until the center is operational,” Qudss says.

“Okay, I get that. Go on.” Ahmad says.

“The project management plan should answer three or four questions for you. We will work on them together, one at a time,” Qudss says.

“Here are the questions.

“First: How do we define the project?

Second: How do we manage and control the project?

Third: How do we close the project?

Finally, How do we operate and manage the center?”²³



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How to Define the Project

“Our WBS is a good starting point for the first question. Based on the WBS, this question addresses several issues, including how to define the legal aspects, facilities, funding, and operational requirements.”

“In our earlier discussion on basic requirements, we talked about the four questions above along with a few of their lower-level elements. We sketched a breakdown of the higher elements as well. Now, in the project definition stage, we will need to develop the details for the WBS and the basic requirements. Think of, *how to define the project* to mean *how to develop the details*.

“Let’s start with the facilities. Earlier we outlined the main requirements, such as rooms and offices, but we did not define the details, such as the size of the rooms and the engineering needs, like electrical equipment and machinery rooms²⁴.”

“So how can we properly define the facilities? We need an architect and a landscape architect. Maybe the university can donate some services, or we can go to a local architect to see if he or she can do this for us on a volunteer basis.”

“For the legal aspects, a good lawyer can do the research to define the requirements and establish the not-for-profit association for us, including the bylaws, articles of associations, board of trustee structure, and management requirements,” Qudss continues.

“Funding is an issue that requires Ahmad and George’s direct involvement. I hope that in the meeting later this week we can help you get serious commitments and even close some deals. In the project definition stage, we will need a cost engineer to help us with the detailed project cost estimate, and a business planner to develop a two-year operating budget. Those will be the basis for the final approval of the project before we award a contract for the engineering and construction.

“Finally, for the operational requirements, it would be a good idea to hire someone full time who has experience in a community center or something similar to establish the operational requirements, and that person will end up managing the center.”

“This is starting to get exciting,” Ahmad says.

“Finally, serious work is about to begin. I cannot wait!” George chimes in.

How to Manage and Control the Project

“You think this is fun, wait until you start to implement the project,” Qudss says with a smile.

“As we mentioned earlier, the next stage is the project definition stage,²⁵ where we develop the Project Detailed Plan, or PDP.²⁶ Once that is complete, and the definition package is ready and approved, we move into the project delivery phase, starting with its first stage, project implementation. At that time, we start to implement what we defined. At that time, we start spending serious money.” Qudss explains, smiling.

“Qudss, slow down. Delivery, implementation, PDP – it sounds like I am delivering pizza,” George jumps in, half joking, half lost.

“I have been waiting for this kind of comment. Project management is straightforward, but it involves many steps. Let us look at the model again.” Qudss pulls out a letter-size laminated sheet illustrating the full model as shown in her email to AG.

“Qudss, let me interrupt for a second,” Furat says. “AG, keep in mind the three main phases as seen in the high-level view: project concept, project development, and project delivery. Project concept establishes a general understanding of the idea. Project development expands on the idea defines the scope and develops the project management plan. During project delivery, we implement the plan, get ready for operation, and hand off the project to the operations team. At the end of the third stage, we close the project.” Furat explains.

“We are with you, Furat!” Ahmad says, and George nods in agreement.

“As we implement, we do the work, and we also manage and control,” Qudss says.

“How will we do that?”

“We have already agreed that you, Ahmad, have been the project manager and the sponsor. As we move forward, maybe you need to stay with the sponsor role, only.

“Why will we roll back to the sponsor role?” Ahmad asks.

“Ahmad, you have a job that keeps your days filled. During the project definition stage, you might have time to manage the project, but as it moves toward implementation, you cannot dedicate enough time to manage properly. So what we advise is that you and the other main donors and supporters form a steering committee, which you or someone else could lead. Then appoint a professional project manager to manage the upcoming intensive stages. This is better for you and for the project. I think you recognize that you do not have the necessary expertise to manage the day-to-day requirements of an engineering and construction project. During these upcoming stages, Furat and I will continue to support you,” Qudss says.

“Okay, I can accept that, but as the sponsor, what’s my role?” Ahmad inquires.

“You will be working with the steering committee, to sustain their support for the project, in addition, to keeping an oversight on the project management team. The project manager should be managing the day-to-day activities and reporting to you weekly, and then you will report to the steering committee every month or two.

“The project manager role is to supervise the architect and the landscape architect. Project manager will also prepare the request for proposals for the engineering and construction work. The project manager might offer advice on the best approach to implementation, such as whether to go with separate contracts for design and construction or award a design/build contract²⁷ for the whole thing.”

“I see now,” Ahmad says. “Since I do not even understand a lot of what you are talking about, I agree with you about having a professional project manager.”

“The PM will also identify the team that you need to manage the project. He has to understand the quality standards, in addition to the safety, health, and environmental regulations,” Qudss says. “Remember Q/SHE? It means quality, safety, health, and environmental aspects.

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“The PM can also define the communication requirements and manage risks, with help and advice from you and the steering committee. There are other things for the project manager to do. Your job is to make sure they are all done,” Qudss adds.

“How do I know if the project manager is doing those *other things* if I do not know what they are? How can I know if they do them correctly?” Ahmad is lost.

Qudss responds, seeing her friend’s confusion. “Here is where I come in, Ahmad. First, we will have to develop a detailed agreement with the project manager, defining his or her activities, tasks, and scheduling. That way you know what has to be done, and you can track the work to see that it is done on time.

“Concerning how to know if the work is done right, you will do it with our help, of course. You can send us the reports from the project manager. You can also send us other documents that we will ask for occasionally. We will check them. With the permission of Mr. Faisal, our CEO, we might even be able to get some support from our specialized colleagues.”

“Outstanding! Teamwork at its best!” George exclaims.

How to Close the Project

“We discussed how to define and how to manage and control. The third point is how to close the project. Proper close is not crucial for this project because it is not being done for an organization, but still, it is a good thing to do. There are certain things I would like you to do during the closure so I can use your project as a project management case study. Later we’ll help you properly close the project, including recording the lessons we’ve learned along the way,” Qudss says.

“Okay, how do we learn our lessons, teacher?” George asks.

“When we specify what we have learned, we keep improving our methods. Further, the entire organization can learn what one team has learned. Learning will allow organizations to improve their performance over time. Every time you say to yourself ‘oh, we forgot about this’ or ‘we should have done this instead of that’ or ‘we should remember to do it this way, it actually works,’ these are lessons learned and should be documented at the time they come up.” Qudss explains.

“Three questions done,” Furat says. “It is time for the last one – how to operate the center.”

How to Operate the Center

“We will cover operations in more detail in the project delivery phase and develop operational procedures and requirements as part of operation readiness. For now, you and the steering committee have to consider points such as these.

1. You need to think about how to motivate the volunteers.
2. You need to establish some guidelines about what services to offer and the qualifications of those providing them.
3. How many people will you need? How many volunteers in various areas of expertise? Do you anticipate having enough?
4. What is the role of the center manager? Do you need other employees or can you get by with volunteers?
5. How will you recognize the donors, supporters, and volunteers for their contributions?
6. What are your thoughts on the activities and events the center will undertake toward the goal of being self-sustaining in two years?

I am sure there are other questions, but these are all I can think of at this time,” Qudss closes, out of breath.

“This is great – and more than enough!” Ahmad says.

“Before we go, in the upcoming meeting with the various stakeholders, we should have a good write-up on the basic requirements document and the project management plan. It would also be neat if you Ahmad and George prepare a professional presentation. A presentation is valuable; will give you more credibility. Based on the outcome of the meeting, or if we are lucky, during the meeting, we could have the police visit as George likes to say. In other words, there should be a stage gate to decide if there is enough interest to go forward, or if we should kill the project,” Qudss adds.

“Kill the project? Undoubtedly, the police would come then!” George exclaims trying to sound shocked.

“I am sorry to say this because this is a terrific initiative and we are delighted to be part of it. It has been a good learning experience for me in project management and humanity. Your servant leadership, AG is inspiring, and I would love to see this go through to the end. However, we have to have a reality check. If there is not enough interest or support, then this project is at risk,” Qudss cautions her friends.

“Do not be negative, now. We need a positive attitude!” Ahmad exclaims.

“I am not being negative, and you are right about attitude. I say this to motivate *you*, to have a positive attitude, to do your best in the presentation, and to invite as many people as possible. Think of this as do or die!” Qudss offers an encouraging smile.

“I agree. It is essential for us to realize how crucial this meeting is. It is easy to get lost in our own excitement and ignore real life, which can be cold and insensitive.” Ahmad clearly understands the situation.

“We have no doubt you two will be great! Just watching you is inspirational,” Furat says.

“The meeting will be good, guys. I have talked to many people already, and the interest is strong. We just need the final touch, so we need the presentation and the meeting. We will have a chance to interact with the various stakeholders. In turn, they will be able to see the passion, energy, and seriousness of our effort!”

The Stakeholders Meeting

“Ahmad, is this meeting actually happening? You have all these people here tonight?” Furat is nearly speechless as he looks around the room.

“We invited fifteen people, and thirteen are here already, and most have brought one or two other people with them. I guess this project is genuinely needed, and people see the seriousness of this initiative.”

“Good evening, friends!” George says. He introduces Ahmad, who begins the meeting. Ahmad and George take turns talking about the project from conception to this stage. Qudss and Furat also explain the project management plan and their commitment to support the project as volunteers. Qudss announces that her CEO in Dubai has agreed to allow Qudss, Furat, and some other employees to spend a little time on the project during business hours.

By the time the presentation is over, everyone is on their feet applauding. Then Furat stands next to a makeshift board, asking for audience input on how to improve on what has been presented. Many jump in with clarifications, questions, suggestions, and encouragement. Furat notes down the comments and promises that every item will be reviewed and considered.

George steps in and starts to circulate papers to all the attendees. These are forms for the participants to fill indicating their interest, commitment, and what they would contribute.

Later, after everyone leaves, the friends debrief and review the forms that the attendees completed. They were pleasantly surprised to discover that they did receive commitments for much more than they need for the center, including operations.

“Time to celebrate! Outstanding job, all of you!” Furat exclaims.

11 Project Definition Stage

“Qudss, it is almost 22:00 already. We need to start the conference call. They have a crowd of people ready and waiting!”

Furat starts the call.

“Hi Ahmad, are you ready to start?”

“All set!” Ahmad says. “Team is here with me and George is online.”

“The project management plan you sent looks good. We sent you some comments. Did you get them?” Furat inquires.



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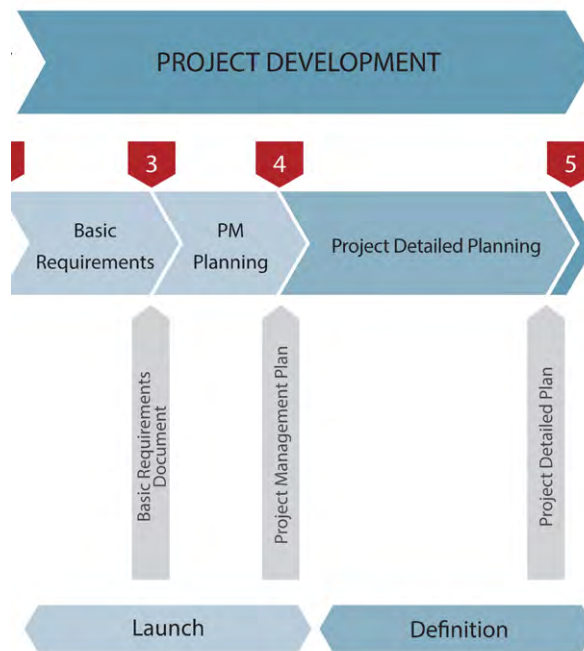


Figure 8: Project Definition Stage (Detailed Planning)

“Yes, and the project manager has already incorporated them,” Ahmad responds.

“Hi all, this is Qudss. Are you ready for the next challenge? The unfortunate news is that there will be significant work in this phase.”

“Is that bad news? I guess so,” Ahmad says. “Is there good news, Qudss?”

“Yes, of course. The good news is that most of the work will be by others. But you still have things to do to keep you busy, Ahmad.”

“With your guidance, we’re ready,” Ahmad responds.

“Great. In this stage, the project definition stage, the immediate objective is to deliver the project detailed plan; PDP for short. The ultimate and crucial objective is to get the key stakeholders to give their approval if all is well. The next stage will require a vast deal of expenditure, and this is why we need final approval, with funding, at the end of this stage,” Qudss explains.

“We’re all ready for the challenge, Qudss. This is a delightful journey, and there is no doubt we will see it through to the end,” Ahmad affirms.

“Excellent! The project management plan is the main document we will use to start this phase. As you know, the first part of the project management plan was about how to define the project, and we have already decided how to do that, so it is time to start defining.”

“Clear, Qudss,” said Ahmad. “I am assuming that we will continue as we have done before. We have divided the definition into four packages: legal aspects, facilities, funding, and operational requirements.”

“Well, the funding part is mostly covered from that dream meeting you and George organized. But you need to have good documentation and transparency, so there are no issues or conflicts.”

“Right!” Ahmad agrees.

“The facilities definition is the job of the PM,” Qudss adds.

That was Ahmad’s cue to introduce the new project manager. “Qudss, I would like you to meet someone.”

“Hi, Qudss! I am Antoun, the volunteer project manager. It is lovely talking with you.” Qudss greeted him warmly, and Antoun continued.

“A good architectural firm has agreed to provide the full design for the facilities, both indoors and outdoors. We have already met with them and showed them the project management plan. The company has authorized their portion of the project and a good team is being put together to plan the job and deliver the architectural package. They will also help us with the design package for the design/build firm that will build the facilities for the project. The design/build company will have a senior manager in our meeting with the architect, and they will have someone in touch with the architect on a regular basis. It is certainly looking good.”

“Wonderful! We’re glad to see this is moving ahead smoothly,” Qudss says.

“Okay, we have covered the funding and facilities. Now how about the other two items: legal and operational?” Furat says, keeping the discussion moving.

“The legal aspect is where we are facing issues. The lawyer who volunteered his services does not have experience in not-for-profit work, and he is somewhat lost. A colleague has agreed to help him, and they will work on it together. We will have to pay some expenses to the other lawyer, but those are minor,” Ahmad says.

“Sounds good. When do they start the registration process for the organization?” Qudss asks.

“In a couple of weeks,” Antoun says.

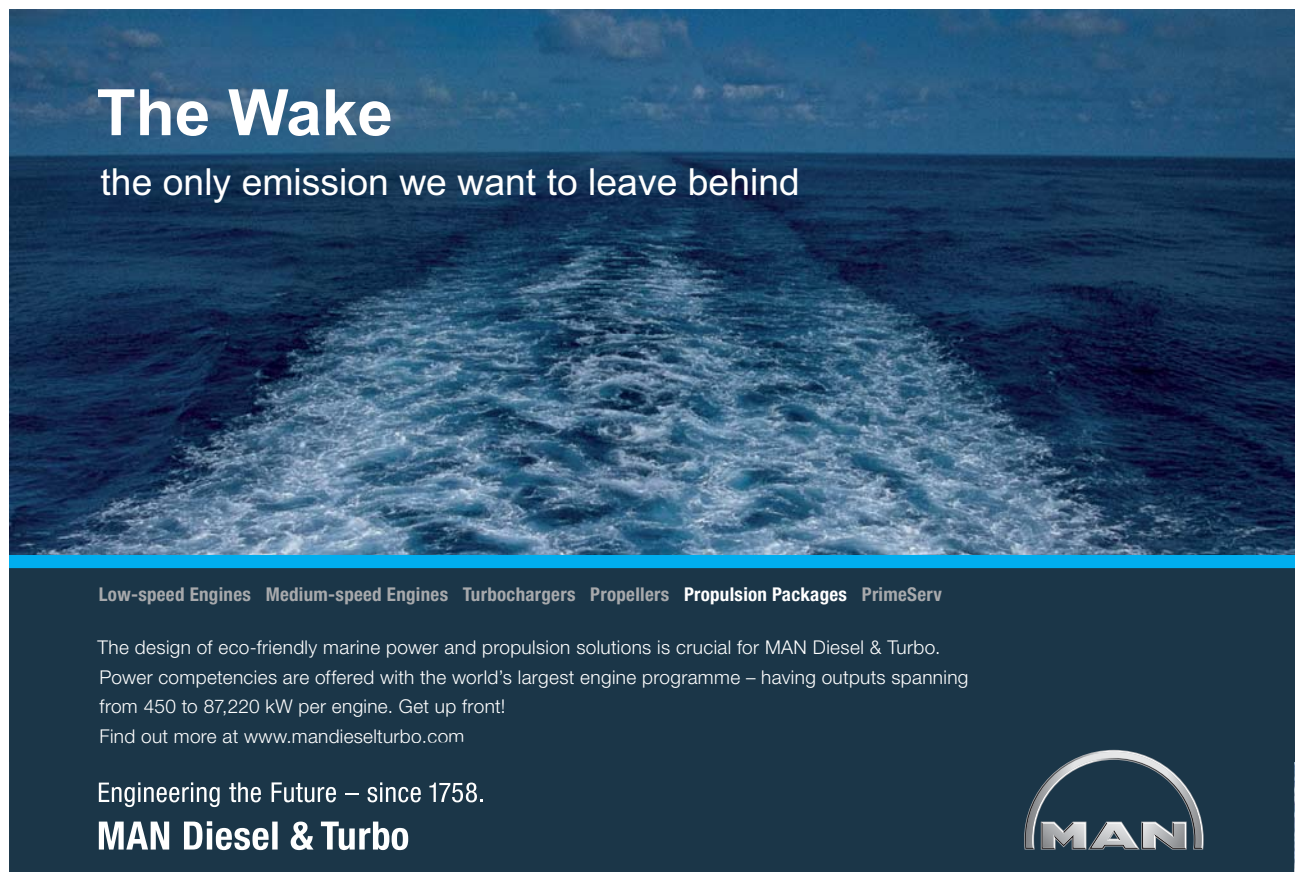
“Just keep in mind, guys, that we may not be able to move to the next phase until all the legal matters are resolved,” Qudss cautions.

“Why is that?” Ahmad asks.

“In the next phase we will start design and site construction work, and the organization that will own and manage the center has to be legally registered by then. The group has to be a legal entity for liability purposes and other reasons, plus we need to have the land ownership transferred to the new not-for-profit organization,” Antoun answers.

“Ahmad, Antoun is partially right. Up to this point, no real money has been spent, and everything is on paper. In the next phase, the stakeholders will be more comfortable if the land ownership and use of the land have been resolved. Most stakeholders will not be willing to pay to construct a center on land they do not own or do not have the right to use. So you either have to donate the land to the new organization, by transferring ownership as Antoun said. But the transfer of ownership is not the only option because the law in Lebanon might allow you to lease the land for a symbolic amount – say one dollar per year for a long period, say for 20 or 30 years – to the organization that will build the center.”

Furat adds, “Ahmad and George, this is a point of no return for you. You have to do one or the other, or you will leave the door open for potential misunderstandings, conflicts, and possibly even legal complications,”




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“Legal complications, what do you mean?” George asks.

“If the land is in your name and an accident occurs during construction, who will be liable? You are, personally. However, if the land is under the custody of the organization, then it becomes the organization’s issue. In addition, it is not legal for the organization to issue contracts for construction work on land it does not own or have the right to use. The authorities will not permit that,” Furat says.

“I understand. We will make sure this is given the proper attention,” Ahmad responds.

“I am glad it is clear, Ahmad. Okay, we have covered three of the four topics. What is happening with the operational side?” Qudss asks.

“We have identified two or three candidates for the position of the community center manager, and we will be meeting with them soon. However, this has been a low priority because we have time, do not we, Qudss?” Ahmad asks.

“Yes, you do. We still have a long way to go. Architectural design will take a few months, and then we need to complete the project detailed plan in order to get the final approval of the stakeholders so that we can proceed with the project.

“After the approval, you need detailed engineering design and construction, which will take 18 to 24 months. Therefore, you do not need to hire anyone before final approval, and you can even wait until the detailed engineering design is complete. You should be considering volunteers as possible candidates for center manager. This would help you know if the candidates are willing to volunteer time to help you define the requirements for the center. After all, you will need an accounting system, human resources policies, volunteer management, and more. Another advantage is that if the candidates are working with you, you can assess them up close, which will help you select the right person.”

“Great idea, Qudss. We will do that,” Ahmad responds.

“All right, before I go, because we are moving into a hectic time, why do not we schedule a regular call for the first Friday of every month? If something urgent comes up between meetings we can always talk,” Qudss proposes.

“Good night.”

“Good night.”

12 The Project Detailed Plan

Hi Ahmad,

In this long email, we will follow up on the previous discussions.

We trust that Antoun is quite capable of doing this work. However, because we promised to help you manage the project, here are the other parts of the project detailed plan; Antoun and his team should work on these items. This email shows what they should deliver to you. As usual, if you need help in reviewing the PDP or sections of it, email it to us, and we will look it over and give you some feedback.

The Scope Baseline

In our discussion, we identified the main packages that would be required for the project; in project management, we call these the scope packages, and we show them on the Work Breakdown Structure.

Look at the initial WBS that we created when we were visiting you in Lebanon²⁸. At the top is The Center, which is WBS Level 1 because it is the highest level in the WBS. Level 2, immediately below Level 1, shows the four packages we have been discussing. In WBS language, we call them *elements*, and because they are at Level 2, they are major elements; or major deliverables. Next is Level 3, which provides more details for Level 2 elements. Notice that for three out of the four Level 2 elements (legal, funding, operational) we stopped at Level 3 and did not offer any more details. For the fourth item, facilities, we expanded the WBS to Level 4 in order to cover both indoor and outdoor facilities. That is where we stopped before. Now it is time to expand the details, adding more levels for all the elements.

I am sure you appreciate the degree of detail that we are discussing. This is the justification for proper project management support, which you are getting with Antoun and his team. As the detailing of the various packages is in progress, it would be a good idea to have Antoun expand the WBS.

The project detailed plan will include this expanded WBS and the detailed scope of work. The scope of work document, you will use in conjunction with the graphical WBS, and all this is what we call the Scope Baseline for the project.

A baseline is a fundamental reference, which we use to measure project performance as we move into future stages.

Quality, Safety, Health, and Environment

It is vital to have the project manager and his team work to identify the standards and requirements in the areas of quality, safety, health, and environment; Q/SHE, remember? The standards and regulations for these areas will have to be determined and a plan established for achieving compliance. Do not skimp on this effort; it is crucial to comply with applicable laws.

Develop Project Schedule

In parallel to all of the above, someone on the team should be working on a detailed project schedule, an expansion of the earlier schedule but with better information. The project has progressed, and you have information that was not available before. Besides, the previous information was probably based on assumptions. You now have the architectural team, and I am sure they can provide better input than what we had before.

We believe the schedule is necessary, both because it is necessary to good implementation and because you can use it as a communication tool with the stakeholders. This way, the various people and organizations, know when they will be involved. This is extremely beneficial because most of your stakeholders are volunteers, and it is basic courtesy to share clear information.

The approved schedule will become the baseline schedule once you all approve the PDP.



The advertisement features a circular logo on the left with three stylized human figures in the center, surrounded by gears and four arrows pointing clockwise. To the right, the text reads: **UNLEASHING CHANGE MANAGEMENT**, **OCTOBER 18 & 19, 2018**, and **DE RODE HOED AMSTERDAM**. At the bottom, there is a silhouette of a city skyline including a windmill and a bridge. In the bottom left corner, it says 'Global Executive Events'.

Cost Estimating

The project management team should handle the cost estimate as well, and like the schedule, it is an update of what you have from before, but with more details and improved accuracy. This is crucial for final approval and transparency among the stakeholders.

Keep in mind that the estimate should not be about the facilities only, but all costs, including the initial two years of operation, plus furniture, equipment, plants for the outdoors, and much more.

Human Resource Requirements

Human resource planning is about the people requirements for the project. The expanded WBS is a starting point to determine who will be required to carry out the tasks that you have in the plan. Because you will primarily be working with volunteers, there are two rules to keep in mind:

1. Not all of those who say yes to volunteering will actually deliver or show up, and
2. You need to allow extra time for volunteers to deliver a given task, due to their other personal and work commitments.

You need to be patient, allow extra time, and have contingency plans.

One final note on this topic: establish a responsibility assignment matrix (RAM). We use RAM to clarify the roles and responsibilities of the stakeholders. You could use a matrix that shows who is responsible for a given task, or a more comprehensive model such as a RACI matrix.²⁹

Communication Plan

People manage projects; projects affect various stakeholders, and everyone needs to receive or pass on information. The communication section of the project management plan will help us establish the right mechanism for effective communication among all stakeholders, internal and external.

Risk Management

Risk management is vital, and you should have been practicing throughout the project. At this time, you need an extra focus since at the end of the stage, you have to fund the project; that would be the point of no return. Here are the steps in ascertaining risks for the project.

1. Most stakeholders should be involved in identifying the risks.
2. If you do it right, you will come up with a long list of risks. Most will be minor, but some could be substantial.

3. You will need to assess the risks and the way we do this is by determining the likelihood of the risk occurring, probability, and its impact if the risk occurs. This could be a challenge, but we advise you to simplify it. This risk assessment exercise will help you prioritize the risks and group them into high, medium, and low priority.
4. You will need to develop a response strategy for each risk, based on their priorities. High-priority risks require focused attention, whereas lower priorities can be placed on a watch list for future monitoring.

We are simplifying this immensely. Extensive risk management requires more than described here, but our objective is to get you to think about risks, not to turn you into experts in risk management.

Project Procurement

This can be easy, but it is highly risky as well. The good news is that you have many organizations volunteering their people and services. The unfortunate news is that because of the nature of volunteering, you could become too flexible about contracting, even to the point of using verbal contracts rather than documented ones. Verbal contracts and other casual arrangements just are not acceptable.

There are various legal ramifications here, and these ramifications should be addressed like any contract for a paid service. You should have a contract, or at least a written agreement, even though the service is rendered for free. Actually, we think you should take the time to complete the agreements in detail because all parties have to be clear on what they will deliver or receive, and clear written documents will reduce the chance of ambiguity. The last thing you want is a conflict over expectations with someone who has given a great deal to the project.

Other Considerations

I have to caution you about something. Antoun comes from a construction background, which is good, but it is likely that his background has not prepared him to handle the legal and operational aspects of the center. As a result, he could overlook certain requirements because with his background he might not be used to this work. We recommend that you have Antoun focus on the facilities components and let you and the steering committee worry about the rest.

Regards, *Qudds*

13 Final Decision

With the project detailed plan finalized, it is time for Ahmad and the team to prepare their presentation to the steering committee and have another stakeholders' meeting to obtain final approval. George is home on a short visit from Saudi.

Shortly after the meeting, Ahmad and George are on a conference call with the Dubai team.

“How did the stakeholders' meeting go?” Furat asked

“Wonderful, the meeting went well; we have a go. However, as you warned us, we lost some volunteers, including the volunteer lawyer. He left Lebanon for a better opportunity elsewhere. This is our problem in Lebanon – more people leaving than coming here. However, quite a bit of the legal work is complete, and the other lawyer is working with us for reduced fees. We also lost a couple of the financial supporters for various reasons, but we are still doing well. Those risks were anticipated, and we are able to manage the consequences as we planned,” Ahmad says.

“Well, that is the project management life, which is not terribly different from human life. You understand now why we plan, consider alternatives, and assess risks?” Qudss says.

“Yes, we do, and we are gaining a better appreciation of how things work, and why project management is essential,” Ahmad replies. “Qudss, hang on, George wants to say hi.”

“We'll be waiting for you, and hopefully the baby, for the groundbreaking ceremony. We are already planning it, and I will take a month off from my job in Saudi Arabia to handle the event. It has to be done well!” George says.

“Wonderful! It seems you have the final go-ahead. George, this is an outstanding achievement. Well done!”

“Thanks. You rest up and take care!” George says.

Part 4: Project Delivery Phase

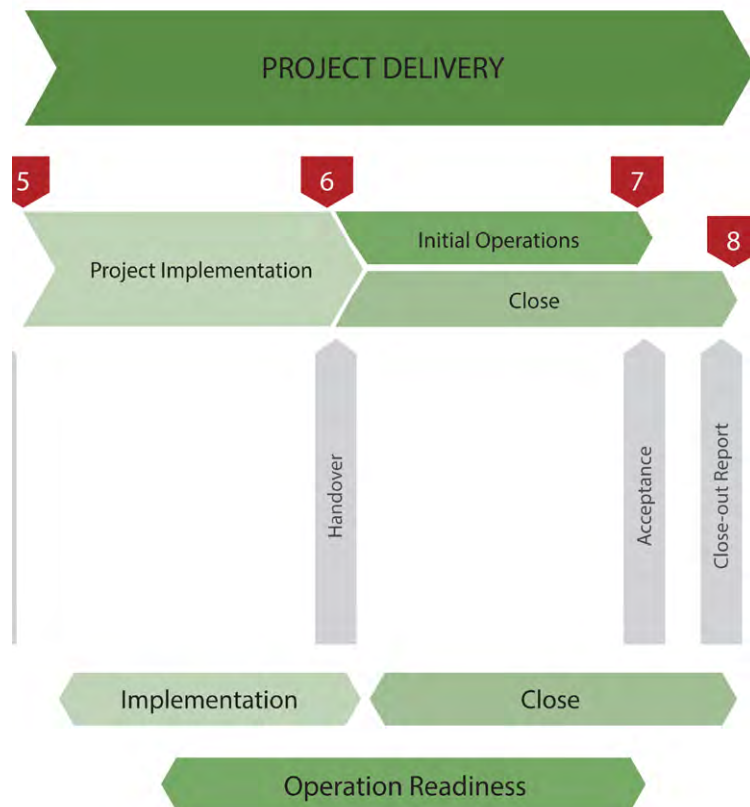


Figure 9: Project Delivery Phase

14 Introduction To Project Delivery

“Hi Qudss, how are you? This is Ahmad.”

“Good evening, Ahmad. What can I do for you?”

“As you know, we received approval to proceed in our last meeting, and we need your help. We are moving ahead, and I think I know what we need to do, but I would like your guidance. Would you let me talk for a while and then correct me if I am wrong?”

“Good idea Ahmad, go ahead.”

“The way I understand it, with the approval in hand, commitment for funding obtained, and supporters on board, we are ready for the real work and to deliver the project, foundation and center.”

“Correct!”

“So here are the upcoming stages for project delivery.”

“The first stage is project implementation, which is essentially doing what we have planned and documented in the project detailed plan. Mostly the design/build contractor selected for the main facilities will handle this stage. While the design and building work are going on, other team members are working on the other project requirements.”

“You are doing well. Go on.”

“During this stage, project management team members should be watching the implementation activities and project performance for project control³⁰ purposes, verifying that work is progressing according to plan,” Ahmad says confidently.

“Excellent!” Qudss is happy that her work has paid off and that Ahmad is learning and taking responsibility.

“Next, during the implementation stage, we should have a team working on operation readiness. This team will prepare the procedures and guidelines, which we will use once the center is open,” Ahmad says.

“Right! You have learned well, my dear friend.”

“Finally, once the project is complete and the center is open, we need to have a proper project close, which is a bit murky for me, but I know it has to do with documentation and lessons learned,” Ahmad says.

“Do not worry. In general, you have the idea, and we will talk about it later. I am excited about the progress of the project. I am also proud of your effort and accomplishment. I am also encouraged by your determination to learn proper project management. Anything else you want to share with me?” Qudss asks.

“I do not think so. You have confirmed what I thought, and I am ready for you to explain the implementation stage in more detail the next time we talk.”

“That is great to know.” Qudss said as she hangs up.

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15 Implementation

“George call the others. Qudss and Furat are online to start the conference call.”

“Good evening, everyone, are you ready to start?” Furat begins.

“Ready, set, go!” George says.

“In our model, we see implementation starting with the final project approval, where we are now. The word *implementation* means carrying out the physical work defined in the detailed plan, or in other words, completing the deliverables for the project.”

“Okay, that is clear. Implementation means doing the work!” Ahmad repeats.

“Only doing the work?” George asks.

“Yes, although project control is happening at the same time, project control is always there – from the start of the project, but now it would require more focus” Qudss says.

“As we follow the project management plan and do work in accordance with the project detailed plan, it is inevitable that some things will not happen as intended. We need people to manage projects, so they can respond to unexpected events and adjust the work if necessary. We have to keep our eyes on the statement of project objectives: it is our compass, telling us where we are going.”

“What might happen during implementation?” Ahmad asks.

“Those events are called variances or deviations from the plan. For example, something will cost you more than what you had budgeted, some activities will finish earlier than scheduled, work packages might be missed or incomplete, just to name a few,” Qudss says.

“Okay, Qudss. So a variance could involve cost, time, hours, quality, people, or anything else that is different from what we outlined in the plan,” Ahmad says.

“Yes, that is right. Some variances are minor, and you might decide they are not a problem; you simply note them and proceed. However, you could also encounter substantial variances, and you must address them. Let us say some products from a vendor arrive at the site damaged; you will need to replace them. If this happens again, you will need to understand the cause. Is it the shipping and handling, or are the materials substandard? Once you know the cause, you can take the proper action.”

“Clear. What are some other things that might happen?” Ahmad inquires.

“Similar things, mostly, but before we talk about other things, let us finish this point. For substantial variances, we need to take corrective actions. A corrective action is necessary, but it is reactive, after the fact. In project management, we like to be proactive.”

“Proactive? How?”

“Let us talk about the damaged materials. There are two things we can do to ensure we do not receive substandard goods. One is to select a vendor known for quality products. The other is to use proper shipping and handling procedures to minimize the chance of damage in handling,” Qudss explains.

“How do we know there could be potential problems with a specific vendor?” Ahmad asks, concerned.
“How do you know if the vendor is reliable?”

“Actually, you do not know if you could have potential problems with a specific vendor, so you need to follow the previous two steps for all your materials suppliers. The same guidelines apply to contractors on-site,” Qudss explains.

“How about the second question – the one about knowing if the vendor is reliable?”

“It’s not easy to know with every vendor, but there are steps one can take for most vendors. You should check the vendor’s reputation. Do they have a quality system in place? Do you or your contractors have any history with the vendor? In some countries, there might be a better business bureau, or a government agency that keeps records on registered companies. There are various other ways, and Antoun and his team should know how to do this,” Qudss says.

“Wow, this is a lot of work. Brother, I am glad it is you in the lead and not me,” George adds.

“Yes it is. That is why I have said you need a professional project manager who knows about this stuff and should be able to handle it properly. If you do not select vendors carefully, you risk delaying the project or accepting substandard products. Which is a better option, due diligence or delays?” She asks wryly.

“I see your point,” Ahmad replies.

“Okay, let us summarize what we discussed. So far today we have dealt with three topics: corrective action, preventive action, and rework or defect repair,”

“Very well. What are some other things that might happen?”

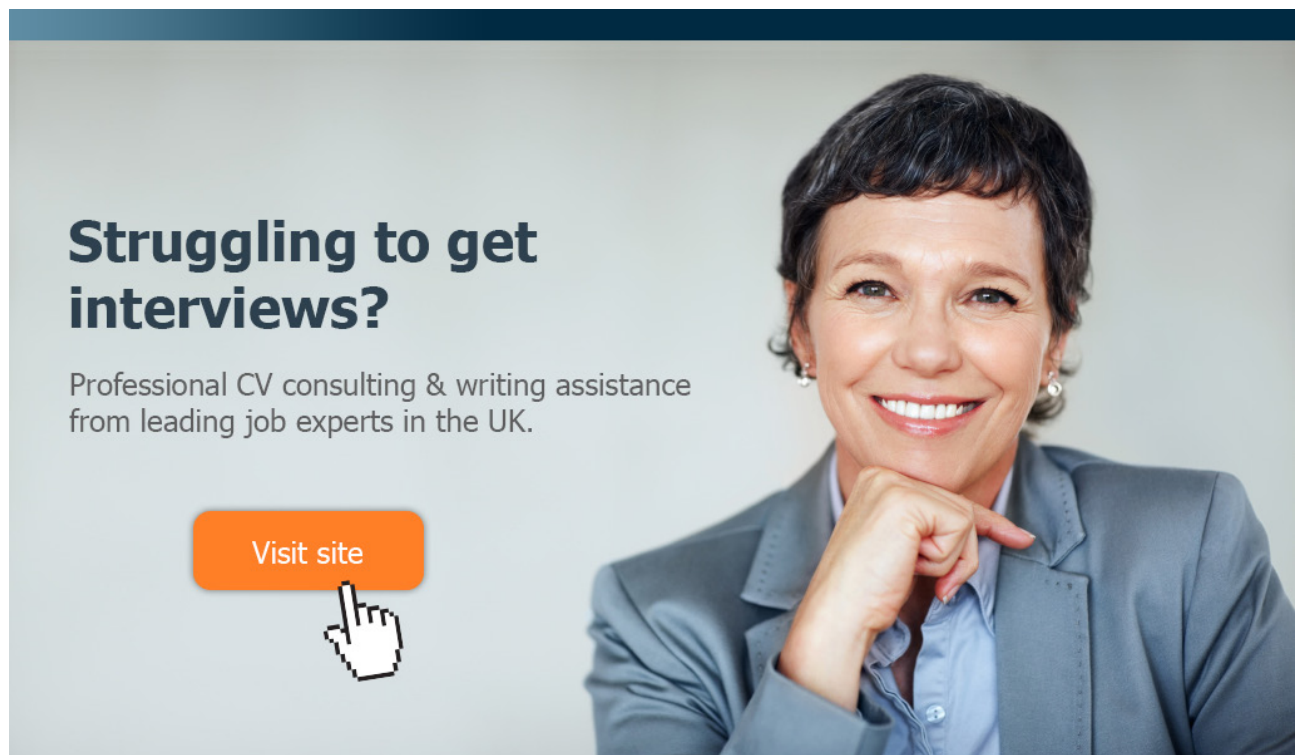
“Changes! As you start to see the design and construction of the facilities, you will be tempted to change things. Make a room bigger or smaller, change the layout – there are a lot of things you might be tempted to change.”

“You are right. We are already considering increasing the size of the center,” George says.

“Well, be careful. So far, all your work has been on paper because it was planning and architectural design, so a change is limited to paper. The cost has been low. As you start the engineering design, buying equipment, and construction activities, the cost of change will be enormous. You will likely run over budget and behind schedule. If you face that risk, you might be tempted to shortcut quality. What complicates the issue is that the full impact of a change often is not easily determined, especially the downstream and indirect consequences,” Qudss says.

“Hmm, I would never have thought of that.” Ahmad is still concerned, but his confidence is not shaken.

“Because you do not have experience in project management, we expected that you might miss some key points. That is why we are highlighting potential pitfalls. We suggest you, and the rest of the stakeholders to have one final meeting with the architect and the design/build contractor as soon as possible. You all need to consider last-minute changes. Forget whatever is not necessary,” Qudss adds.



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“I’ll do that, Qudss. I appreciate the warnings,” Ahmad responds.

“Before we end the call, there are other things for you to consider, especially when it comes to project control. Antoun, are you comfortable with what needs to be done?” Qudss asks.

“Yes. I know project control is crucial, and we emphasize the need for excellent control. My team is on top of this, and we have a dedicated project control engineer.”

“Great, Antoun, I am glad to hear it,” Qudss answers, adding, “Okay, to wrap this up, let us review the project management plan and the project detailed plan.

“We outlined a great deal of information to guide you in the next stage, such as implementing the communication plan, quality assurance and control, risk monitoring and control, developing and managing the team, contract administration, and other important considerations.”

“We are already working on this, Qudss,” Antoun says.

“I expected you were. Well, if there is nothing else, we can end here. We will continue to check with you on the progress, and maybe when Ahmad and George are in Dubai next, we can talk about operation readiness.”

“That’s a plan. Take care, Dubai folks!” Ahmad and George say together.

“Good night, Lebanon!” Qudss says.

16 Operation Readiness

“Now AG let us get back to work. How is the project going?”

“Great! We have launched the engineering design work, and the steering committee met to discuss changes as Qudss recommended. We decided to keep everything as is. I think the architect did an excellent job, and most ideas for changes were rejected or were minor. They are more like design development, rather than changes; they will be handled in the detailed engineering design,” Ahmad says.

“This is good news. It saves you a lot of headaches,” Furat says.

“We did have a couple of small issues that we will deal with during the design work, and Lebanon has introduced new safety laws that have an impact on us and were not considered earlier, but we are handling those matters. We also lost one of the lead engineers from the design/build contractor. She was in a car accident and will need time to recover,” Ahmad says.

“I am sorry to hear that and wish her a quick recovery.”

“Today’s topic is easy, and we have already talked about it before: It is the operation readiness stage.”

“We’re ready to talk about readiness,” George quips.

“As you recall, in the WBS and the project scope we highlighted four main packages. Here are the first two.”

“One is funding, which was resolved with the approval.”

“Two is legal. Where are you on the legal aspects?”

“We are in the final stages of forming the organization that will own and manage the center. It is a charitable foundation – a not-for-profit association,” Ahmad explains.

“Great and the facilities are in progress, so you are on target,” Furat says. “What remains are the operational requirements, which we will discuss today.”

“We are on track with all these; let us go on to the next topic,” Ahmad replies.

“Although we are almost two years away from handover, we need you to start planning and implementing the operational systems and procedures for the facilities. Qudss worked on a list of some of the things you should be doing, but remember, this list is not complete. There will be other things to do,” Furat says.

“We understand,” Ahmad says.

“In a few months you should hire the full-time center manager, and he or she will finalize what is required. I will present the items on the list, and you can tell me how you are handling them. To start with, we will look at accounting, human resources, laws and regulations, and information and communication systems.

“You need to establish an accounting system that ensures compliance with the laws for a not-for-profit association. Because you have donors, extra transparency is required, with frequent reporting and independent audits. Am I correct that this service and some of the others will be donated by the university?” Furat asks.

“You are partly right, Furat. The university will help us establish the system, but volunteers will do the work. They can be from the community or they can be college students earning university credits,” Ahmad clarifies.

“Okay, let us go to the next item. We have talked about the human resource requirement for the project, and now we need to shift focus to the people who will manage the center,” Furat says.



The advertisement for e-Learning for Kids features a central image of a smiling teacher leaning over a laptop to assist two young students, a boy and a girl. To the right, there are two smaller circular images: one showing three children looking at a book together, and another showing children working at computers in a classroom. The background is a vibrant yellow and orange swirl design. In the top left corner, there is a logo consisting of a grid of colored squares with the text "e-learning for kids" below it. In the bottom right corner, a green oval contains a list of achievements. At the bottom of the advertisement, there is a paragraph of text providing background information about the organization.

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“We are still working according to the initial plan, where we hire one center manager and three people who will work in shifts for security and maintenance,” Ahmad says.

“Okay, this is good, but we need to see if it is still valid now that we are implementing the project. Further, you need someone to establish employment rules and policies that comply with labor laws regarding benefits, vacations, taxes, and other things,” Furat says.

“A manager and three helpers are not enough, but because you will be depending on volunteers, we will leave this topic and address volunteer management later.”

“Information and communication technology requires that you design and install an entire system. This is more than just getting a phone line. You need a computer system, including hardware, software, startup, and maintenance, among other things. It is good to have a public announcement system with built-in speakers and an audio system because you plan to hold events,” Furat elaborates.

“Volunteers are fantastic, but they are also a challenge. You need a system to keep track of volunteers and their contributions, what they can offer, their dependability, how to motivate them, and most importantly, how to reward them and recognize their contributions.” Furat continues to work his way through the list.

“What services will you provide, and how will they be offered? You need to document the services and incorporate them into a booklet, so community members know what to expect,” Furat suggests. “This is probably being done as part of the foundation registration, but the bylaws also need to be written in a straightforward form and communicated with everyone involved. Here are some of the areas that need to be addressed.”

“Board of trustees and organizational structure: A foundation like yours must have a board of trustees responsible for the proper functioning of the foundation over the long haul. The board of trustees will likely have an executive team to manage the foundation activities.”

“Fund raising: You must have a process for raising funds. You will need to produce a cash reserve of at least two years of operations. More funds mean more services and potential growth of the center, and you might replicate the center in other locales.”

“Event management: You will need a team and a process for management of formal events. You want to be a center for educational and service-oriented meetings and other events, so you will need to pay attention to these as well as formal meetings.”

“Marketing and public relations: It is vital to market the center, even though it is not a commercial entity. What you are doing is worthy of attention, do not be shy. Get as much publicity as possible, and invite the media and other community organizations to see what you are doing.”

“But is not that a bit egotistical?” Ahmad asks.

“Not unless you start a self-promotion campaign. Everyone, including the steering committee, should do this together so that it is clear the publicity is for the center and not for individuals,” Furat explains.

“Non-governmental organizations (NGOs) and government agencies: The board of trustees or executive team should include a person responsible for government and NGO relations. Some of these organizations will no doubt support you. You need to find out what agencies and NGOs exist and then approach them.”

“Wonderful Furat! You and Qudss must have put quite a bit of effort into these recommendations,” George exclaims.

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17 Project Close

Six months later, Furat and Qudss are discussing AG's center and the progress the brothers have made. Furat says excitedly, "They have actually done it! Ahmad and George have invited us to Lebanon for the groundbreaking ceremony. Can you take time off to go?"

"I truly want to go, Furat, but there are too many things going on at work, plus I do not want to travel with Nour³¹. For a quick trip like this, it is a hassle to travel with a baby."

"Even if it is a day or two?"

"Yes, even for a day or two. You can represent the UAE contingent."

"Okay, will do, but I'll only go for a day."

Later in Lebanon...Furat, Ahmad, and George are at the site two hours before the specified time. Soon others start to arrive, and a crowd gathers. About thirty minutes before the ceremony begin, government officials start to arrive....³²

Later that day, as Ahmad and George drive Furat back to the airport, he gives them the final coaching session for the project.

"AG, I know today was the groundbreaking ceremony and construction will probably take more than a year, so it might be too soon to talk about project close. Yet, today is a good opportunity to cover it since we are together" Furat says.

"This project has been progressing well and going through the gates and hurdles one at a time; it is quite an accomplishment." Furat adds "This is the final official coaching session on project management methodology and processes, and Qudss wants you to know we will continue the monthly conference calls and occasional meetings until the project is completed and closed. Those conversations will be review sessions, not about the methodology. Further, Mr. Faisal³³ has committed his continued support for the project. By the way, you guys should have invited him to the groundbreaking – that's a mistake in stakeholder management."

"You are right, Furat, it is my fault, I will apologize to him," says George.

"Qudss prepared an outline for the close-out report. I will highlight the main points for you."

"Sounds good, Furat, we are listening," Ahmad responds.

“The close-out report documents what happened on the project from start to finish. These are the things that are worth highlighting, which support organizational learning. Although, we did not have an organization developing this project, you are representing an organization now. We also understand that you two are unlikely to develop another center, so the close out report seems less relevant. However, your project could be an example for others, so documenting the learning process is of considerable value. Who knows? One day you might be coaching others on how to do this as Qudss has done with you.”

“You did, too, Furat,” Ahmad says.

“Yes, I know I have been supportive as well, but Qudss was the main source of assistance for you. Even when I am coaching you, like now, most of the information comes from her. She is a great teacher. Now that you have been working with her for almost two years, I am sure you can see how she changed my life.”

“Anyway, back to our project close and close out report.”

“The most important factors are the reconciliations between the final performance and the project detailed plan.”



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“In earlier stages, we should have also performed reconciliations between the project detailed plan and the project management plan, as well as the project authorization document and project objectives. These reconciliations are valuable learning opportunities for future projects. I’ll read part of the list for you now so you can ask questions if you have any,” Furat says.

“Scope: Did the team deliver everything listed in the scope of work? If not, what was different and why? Did we document these differences as changes? If not, why not? What are the consequences of the missing or additional scope items or activities?

“Time and cost: Did the team perform according to the project’s time and cost baselines? Were the final performance metrics within acceptable tolerances? Did you use the reserve time and contingency allowances? Were they enough? Are the differences in time or cost due to unusual circumstances, or are they related to improper planning tools and techniques? Could these deficiencies occur again on future projects?

“Human resources & communications: The same questions apply to this item with regard to people. For example, were there exceptional performances that should be recognized and commended? Was the communication plan effective? Did you get through to the parties that you were trying to reach? What went well and what did not? Were the various stakeholders satisfied with the level of communication?

“Risk management: Did you follow the process? How effective were you in responding to risks? Did the stakeholders identify the risks, or were there adverse events that should have been anticipated? Were the risks assigned to specific individuals to handle? How effectively did they handle the adverse events? Were there issues that should be addressed as learning opportunities?

“Lessons learned: What did you learn, and what do you want to share with others. Lessons learned include both things that went well and others that did not go well. This second category tells you your areas for improvement.

“Okay, guys, this is the end of the list. And I will leave it with you.” Furat folds the paper and gives it to Ahmad.

“Noted, Master Furat. Well done,” George says.

“Good timing. We are at the airport.” Ahmad says as he was ready to park the car.

18 Opening Surprises

On the morning of the grand opening, as Qudss tells George's sister how to take care of Nour, she is startled by the sound of a siren outside³⁴.

"Ahmad, George, what is going on?" Qudss asks, turning toward the balcony doors.

"Nothing important, Qudss," George responds.

Qudss reaches the balcony and sees a limousine, an escort car, and a couple of police motorcycles. "What do you mean nothing important? What is this?" Qudss demands, but AG were gone.

As she looks for them, the doorbell rings, and a professionally dressed woman appears. "Mr. Furat and Ms. Qudss, please," she says.

Furat and Qudss come to the door, wondering what is happening. "Yes, we are Furat and Qudss."

"I am Captain Adon. Could you come with me please, if you are ready?"

"I am sorry but ready for what, and come with you where?" Qudss is trembling

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“I am not at liberty to say. I was asked to come and escort you; those are my orders,” Adon responds with a serious look.

“We are not going anywhere until we know what this is all about,” Furat says, stepping in front of Qudss.

“I am sorry, but you have no choice, you must come with me right now,” the captain insists.

Before Furat can respond, he and Qudss hear laughter from the other room. Qudss goes to check and sees Ahmad and George in tears from laughing.

“Okay boys, I know George is the clown, but Ahmad, you are in on this too. What is happening?” She leaves the room angrily, not waiting for an answer.

The brothers run after Qudss and Ahmad is first to speak, “Furat, Qudss, my dear friends, this is Captain Adon from our team, and she is in charge of security for the event.”

Ahmad whispers in Qudss’s ear, “she likes George, but he is ignoring her. She will do anything to get his attention.”

George jumps in, explaining, “This is not a trick, but the minister of social affairs asked that we have you escorted to the opening ceremony with VIP treatment, the kind usually reserved for ambassadors. The limousine outside is for you, our honored guests. A similar car has been sent to the hotel to pick up Mr. Faisal, your CEO.”

“Say what? Ambassadors? We are just two regular people,” Qudss protests.

“Perhaps, but the minister was quite moved by your support for the project all this time, even during your pregnancy and medical difficulties,” Ahmad says.

“Well AG, I am speechless,” Qudss says.

“So am I,” Furat adds.

“Well, this is the least we could do,” Ahmad replies.

“Any more surprises?” Furat asks.

“One or two more, but at the center,” Ahmad says.

When they arrive at the center, the dean of the university and some Parliament members welcome them.

“Before the ceremonies start, walk with us, guys,” Ahmad says to his friends, and George falls into step behind them. In the back of the property, behind the center, they see a tree house with a small ladder.

“Qudss, Furat, look more closely,” George says, guiding them toward the tree house.

A sign on the tree reads *In Honor of Qudss and Furat: Mentors, Coaches, and Friends*.

“This is your tree house, guys,” Ahmad says. “There is a mattress in it so you can have a pleasant afternoon naps during our lovely spring and summer. This way you can come to visit more often,” George adds.

“Furat!” Qudss kisses her husband and cries; she turns to her friends and hugs them, still crying and unable to speak. The three men give her a hand up the ladder so she can inspect the tree house and sit in it, quietly enjoying this beautiful moment.

“AG, I am as speechless as Qudss. We never imagined or expected anything like this. Your friendship is a gift that we cherish – thank you.”

“Ladies and gentlemen, could you please come to the main garden? We are about to start.” The speaker system broadcasts the words throughout the grounds of the center. The friends walk back to the main garden, where there is a stage, stand with a microphone, and row of chairs with a large crowd. A known Lebanese television host is the master of ceremonies.

The master of ceremonies introduces the speakers one by one, and each says a few words. The audience hears from the minister of social affairs, the dean of the university, and village officials. Ahmad is the last to speak.

“Mr. Minister, honored members of Parliament, respected guests, our journey to build this center started several years ago, and here we are today realizing the dream. So many people have played a role, and I hope I do not forget any today. The idea grew from the desire to honor our parents by using this land they worked hard to buy and care for over many years. We could have sold the land and donated the money to charity, but we felt that was not enough. We wanted to do something unique, and I think with the support of all of you, we have done so.”

Ahmad announces the names of volunteers, sponsors, the university, Mr. Faisal, and others who have been involved. He goes on to say, “Initially we thought this might not be possible. It was a goal, but we did not know how to accomplish it then we remembered our dear friends from the great United Arab Emirates, who helped us understand that dreams could be goals, and achieving them is possible through the concepts of project management. They taught us how to make the goal a SMART goal. They explained to us how to transform a goal from a dream to reality; a reality that you are witnessing today. These people, though they are not from our community, have walked with us throughout this journey despite their busy schedules, Qudss’ pregnancy, and the birth of a beautiful daughter Nour. Qudss, Furat, please join us on stage. They have been our friends. They have been our coaches and mentors throughout this journey.”

As the audience applauds, Qudss and Furat walk over and stand next to the brothers.

“This incredible couple not only delivered a child, but also helped us deliver this center. When we visited them after the birth of their daughter, they told us that they named her Nour³⁵ in the belief that she would light up their lives, as well as the lives of many other people Nour is with us today to help us open the center and to provide its first light.”

Ahmad’s sister Cham walks to the stage, pushing their mother in the wheelchair with Nour in her lap. Nour is wearing a beautiful dress, and Qudss and Furat are shocked. They did not know their daughter would be at the ceremony, and they are delighted that their friends bought her such a lovely dress for the occasion.

At this moment – the lights of the center were turned on as a symbolic gesture to Nour arrival on the stage.

“Friends, I would like to close with a personal announcement,” Ahmad says. “During the life of this project, many friendships have been formed, Nour came into our lives, and – ” Ahmad stops and gestures toward a woman in the audience. “I would like to announce my engagement to Sanaa.” He places his arm around her shoulders and beams as he continues. “Sanaa is one of the project team leaders who volunteered, along with her company, to build this center. She had a severe car accident during the project, but she recovered and resumed her work with us. The center has brought us together.”

“We want to share our joy. Our work here has been an exciting learning experience for all of us. It has brought us excitement, taught us about project management, helped us understand and appreciate volunteers and their unselfish dedication. For me personally, the center has blessed me with a person I love, a woman with whom I can share my joy.”

“We wish that you all may learn, share, and help one another through this center for years to come. For us, it has been a journey filled with learning. Welcome to your center, and thank you for making it a reality!”



The End

Appendix A: Acronyms and Glossary of Terms

Basic Requirements Document	BRD	The Basic Requirements Document is the project document that outlines the key requirements for the project as the project manager and the project management team understand them.
Customizable and Adaptable Methodology for Managing Projects™	CAM ² P™	The Customizable and Adaptable Methodology for Managing Projects™ is the name of the methodology that SUKAD developed, and we are using as the foundation for the project management discussions in this book.
Phase		Often used interchangeably with 'Stage' but in CAM ² P™, phases and stages are different things. The term 'phase' refers to the three principal phases of a project: project concept, project development, and project delivery.
Project Authorization Document	PAD	This is the CAM ² P™ document specific to announce the official authorization of the project by executive management.
Project Breakdown Structure	PBS	Project breakdown structure is similar to the work breakdown structure, except the WBS covers scope items only, whereas the PBS incorporates project management efforts and other considerations.
Project Detailed Plan	PDP	The project detailed plan is the output of the project definition stage, setting forth the details about the project's various components, such as scope, quality, time, and risk.
Project Life Span	PLS	The project life span (and interchangeably project life cycle) is a sequential time line of project stages from idea to closure.
Responsibility Assignment Matrix	RAM	RAM is a matrix used to clarify the roles and responsibilities of the people and organizations involved in the project.
Stage		Often used interchangeably with 'Phase'. A defined period of time in the project life span that usually ends with the production of vital deliverables. In the basic CAM ² P™ model, there are six stages: project pre-launch stage , project launch stage, project definition stage, project implementation stage, project operation readiness stage, and project close stage.
Stage Gate	SG	A stage gate, also an interim review, control point, or decision point. A stage gate usually occurs at the end of a project stage. In the basic CAM ² P™ model, there are eight gates.
Work Breakdown Structure	WBS	A work breakdown structure is the logical breakdown of the project scope into smaller and smaller components in order to facilitate planning, estimating of cost and time, and controlling the project.

Appendix B: The Model Stages

Project Stage	Stage Main Focus
Pre-Launch	The project pre-launch stage is the first stage of the project. The focus of this stage is to understand and validate the idea for a new project. Determine (a) if the project is feasible, (b) if the organization has the capabilities to handle, and (c) if the project is a priority. This is the time to define the project success criteria.
Launch	The focus of this stage is for the project manager, and team, to understand the project objectives, identify the clients' needs, expectations, and define the project requirements. Once the stakeholders align on the requirements, the project management team, will establish and seek approval for the project management plan.
Definition	This stage is about developing the project detailed plan, which provides all the necessary details for the project, such as the scope details (the work), the applicable quality, safety, environmental (health) standards, associated risks, among other details.
Implementation	The focus of this stage is to implement the project. Implementation is the action of doing the physical work for the project, to complete the required deliverables, leading to handover of the complete product, service, or result, to the customer (internal or external).
Operation Readiness	This stage is applicable if there is project product is "something" to operate, such as a facility, a new system... The focus of this stage is on testing, commissioning, preparing and similar work that is necessary prior to handover of "the product" to start the initial operation and also prepare for the permanent operation of the new product.
Close	The focus of this stage is on properly closing the project. It includes all the related activities, such as gathering the lessons learned, updating employees' files, documenting project performance metrics, and updating organizational records. In closing, we would also review the project to measure the product and project management success and define a proper future timing for the organization to measure project and business success.

Appendix C: The Model Gates

Stage Gate	Name / Main Purpose of the Gate
SG1	<i>Idea approval and strategic alignment.</i> The CAM ² P™ model takes the view that every project must be in line with the organizational strategic direction and objectives. At SG1, executive management will make this assessment.
SG2	<i>Project initial approval and project authorization.</i> At this gate, executive management will review the feasibility study, accept it (if no modifications are required), compare the project to others within the organization, and if the project is a priority, select it and authorize it.
SG3	<i>Stakeholders' alignment.</i> SG3 is concerned with the stakeholders' alignment on the project requirements; in other words, does the project manager understand what is required to deliver this project? Requirements include characteristics of the project output and outcome.
SG4	<i>Approval of project management plan.</i> SG4 is about executive management approval of the project management plan. For this gate, the project manager typically submits an updated estimate of the project cost and time, which would allow executive management to verify whether the project is still viable and may revisit the go/no-go decision.
SG5	<i>Final approval.</i> The cost of the work that was performed before this point is minimal in comparison to the total project cost. Therefore, on most projects this gate is considered crucial; it is the point of no return. Once executive management grant the approval it is likely that the project will proceed to completion.
SG6	<i>Ready for handover.</i> This gate is specific to review of the project implementation work and completion of the deliverables. At this gate, operation personnel can determine whether they are ready to accept the handover of the project product from the project management team.
SG7	<i>Final acceptance.</i> This gate is concerned with the final acceptance of the result (product) of the project, clearing the project management team to finalize the project closure.
SG8	<i>Project close.</i> The project closure gate is different from the other gates since there are no activities after the project is closed (excluding future measurement of business success). This gate is no less important than the preceding ones. The project is not closed until all project deliverables are submitted and approved, and the project close-out report is one of those deliverables. The project does not close until that report is submitted.

Appendix D: The Model Major Deliverables

Project Stage	Deliverable	Description
Pre-Launch	Idea Statement	The idea statement (also project vision, project statement, project brief) is simply a few sentences that set the initial idea or vision for the project.
	Feasibility Study Report	The feasibility study report is the document that summarize the studies that the organization conduct to determine whether the project is viable or not.
	Project Authorization Document	The project authorization document (PAD) is the document that authorizes the project.
Launch	Basic Requirements Document	The project basic requirements document (BRD) defines the key characteristics, features, and other requirements for the outcome of the project. This is the project high-level scope.
	Project Management Plan	The project management plan is the document that present the project management strategy and approach for managing the project.
Definition	Project Detailed Plan	The project detailed plan provides all the necessary details for the project, including detailed scope of work, quality, safety, and environmental planning information. We also include updated schedule and cost estimate along with the human resource, communication, procurement, and risk details.
	Request for Final Approval	The request for approval can be a short letter or form that we submit to senior management for the final approval of the project; to authorize the necessary funds.
Implementation	The Output	There is no document deliverable at this stage, but implementation includes completing the deliverables that contribute to the final output, product of the project.
Operation Readiness	Handover (Provisional Acceptance)	Handover (also provisional acceptance) is when the client (operation) initially accept the product of the project from the project management team. It is usually an indication that the work is essentially complete, and the client is ready to start using (or commissioning) the new product.
	Final Acceptance	Once all the work is done, and the new project is in use, there is often a final acceptance, sometime after handover.
	Others	There are many other deliverables that lead to the previous two deliverables, such as operation and maintenance procedures, training, and safety reviews. We do not list them here since most are industry (project application area) specific.
Close	Close-Out Report	The key deliverable is the project close-out report documenting the outcome of the project. It includes reconciliation of the events that took place during the project development and delivery.
	Others	There are other deliverables at this stage. They can be part of the close-out report or they can be independent deliverables.

Appendix E: Bibliography

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Author Biography

Mounir A. Ajam

Mr. Ajam is the author of *'The Inheritance, a Story about Friendship, Community, and Project Management'*. He is also the author of *'Redefining the Basics of Project Management'*, not yet published.

He is a senior executive with close to three decades of outstanding global and practical experience in capital project industries such as engineering, construction, petroleum, utilities and project management. He is an entrepreneur, author, speaker, coach, advisor, consultant, volunteer leader, and project management thought leader.

Mr. Ajam is a co-founder and the Chief Executive Officer for SUKAD Group, a leading project management provider based in Lebanon and with offices in Lebanon and Dubai, United Arab Emirates. Mr. Ajam and SUKAD play quite an active role in the project management community through various professional activities that are open to the community members at no cost.

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Mr. Ajam is a true volunteer servant leader. He is heavily involved with the project management community at the regional and global levels. Globally, he has served in various roles and capacities, such as serving on the Global Advisory Group to the Project Management Institute (PMI®) Registered Education Provider program and as a judge for various PMI® educational awards. He served on the 2008 PMI® EMEA (Europe-Middle East-Africa) Congress Project Action Team. He is also a graduate of the PMI Leadership Institute Master Class.

In West Asia, Mr. Ajam served on the board of directors for the PMI chapter in the Arabian Gulf. He led an effort to establish a PMI chapter in the United Arab Emirates. He also led the effort to establish the Global Project and Process Management Association (GPPMA) and served as its board chairperson for three years.

Mr. Ajam is an advocate of project management and recognizes its strategic value. Therefore, he is contributing to project management growth by publishing professional papers and articles on numerous platforms, such as PMI Congresses, Construction Week Magazine, Dubai Quality Group, DKV Experts Channel, PMForum.com, Wamda.com, and other publications. He is the main author on the SUKAD blog (<http://blog.sukad.com>), in addition to a personal blog.

Mr. Ajam is a native speaker of Arabic and is fluent in English.

For more information about Mr. Ajam, please refer to his personal page at www.mounirajam.com.

Insan Al-Mujtama Foundation

In the Front Matter of this e-book, we mentioned that this e-book discuss the launch of a not-for-profit organization that will build a community center – the main project in this work. Although the center is not a reality yet – the project is real., We have already done substantial work on the concept, feasibility, and initial planning to launch a foundation (not for profit organization). At the time of writing this manuscript, we had started the process of registering the foundation in Lebanon.

Al-Insan is the short name that we are using for the foundation, but the full name is **Insan Al-Mujtama Foundation (Al-Insan)**. The origin of the name is Arabic, to reflect and honor the home of the foundation.

- *Insan* means *Human* and *Al-Insan* means *The Human*
- *Mujtama* means *Society* and *Al-Mujtama* means *The Society (also community)*
- The literal translation for *Insan Al-Mujtama* means *Human of The Society*

The above is the literal translation for the name. However, when we combine the two words, the phrase ‘*Insan Al-Mujtama*’ has a more philosophical meaning. In simplistic terms, the concept is about the difference between an individualistic (selfish on one extreme) mindset and a collective, social, service oriented mindset (Mother Theresa on the other extreme). This is what one might call social or national consciousness. With this in mind, the purpose of the foundation is to serve humanity through serving the humans, directly or indirectly. It is our intention to encourage all to do their part to be or become ***The Human of The Society***, to be ***Insan Al-Mujtama***.

The main purpose of this foundation is to use project management as a social enabler to serve communities around the world. The concept is to use project management for ‘life projects.’ We will accomplish this vision, we will:

1. Provide complimentary professional services (learning and consultancy solutions) to non-government organizations (NGO). This is specific to NGO who are operating and providing social services in the least developed countries and communities on an international basis. The ultimate purpose is to help these organizations build their capacity for delivering service.
2. Provide services directly to communities or in partnership with NGO/humanitarian organizations. The services can include youth camps, training, advisory, and coaching services, among other needs. We explain potential services briefly in the e-book.
3. Reaching out to schoolchildren, by training their teachers, and working with the students on school projects with a focus on using project management as a key enabler.
4. Organize youth camps (high school and university students) to help them learn project management and apply the learning on community projects in their villages, towns, and communities.

Final note: all of the revenues that Mr. Mounir Ajam earns from this work will go toward the foundation and supporting its projects. In addition, we have the land that we have allocated for this foundation.

Endnotes

1. The Customizable and Adaptable Methodology for Managing Projects™, CAM2P™; which the author developed in 2007–2008
2. Furat is the Arabic pronunciation for Euphrates, one of the two great rivers that cross Iraq and other countries; part of what many call the cradles of civilization – Mesopotamia.
3. El-Qudss is the Arabic word for Jerusalem
4. Hence the name of the original book: The Inheritance
5. It is also the subtitle for this e-book
6. An accidental project manager is someone, usually a professional, who does not have project management training but her management asks her to manage projects. Such managers often get into sink-or-swim situations.
7. Since the main objective of this e-book is to introduce project management for those who have no prior project management experience; i.e. Accidental project managers, we put ‘the accidental project manager’ term in the title of this e-book
8. A career project manager is someone who has chosen project management as a career choice and their job is to manage projects professionally. Usually, most career project managers had been accidental project managers
9. In the village of Bterram, Al-Koura, in North Lebanon



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10. PMI® is the world's largest project management professional association, with chapters in more than 150 countries and membership exceeding 400,000 at the end of 2012.
11. Such as Bechtel, Kellogg Engineering, and Honeywell
12. The reference to the "Giant" is that Qudss had developed a course with a title "Awakening the Giant Within" with a focus on the giant of project management. This is how Furat and Qudss met, when Furat came to take the course.
13. Unless it is necessary, the author is removing most of the text on who said what.
14. Various management literatures have different criteria for SMART. The one here is what the author prefers. [Wikipedia shows many of these variations \[http://en.wikipedia.org/wiki/SMART_criteria\]](http://en.wikipedia.org/wiki/SMART_criteria).
15. This in reference to how the twins met Furat when they were stranded in the desert on a road trip that they did not plan for – a spontaneous trip
16. Other project management specialists use the term Project Life Cycle.
17. The terms stage and phase are often used interchangeably. However, in CAM2P™ we view phases and stages as two different things as we explain here.
18. This book is not intended to be a detailed sample project, but only an illustration of the main concepts and an overview of the stages and gates. Similarly, the discussion of feasibility study is not meant as a business guide, only as an introduction to the concept of such studies.
19. In this chapter Furat and Qudss visits their friends in Lebanon to see the land, vacation, and work on the project. As before, we are cutting most of the story line
20. A corporate knowledge database, more recently known as a knowledge management repository, refers to the internal organizational resources holding data from past projects, such as cost and schedule information and risk events. Historical data is very helpful in developing a project.
21. The following example illustrates progressive elaboration: When one wants to build a house, he or she has an idea about the house and its size, but it is a guess, not hard facts. The idea can be outlined on a single sheet of paper. An architect draws sketches of the house, adding another document. Then the architectural design is developed, generating even more paper. By the time the person is ready to start construction, there's probably enough paper to fill a good-size box, but as the amount of information grows, we're still dealing with the same house, so the idea is elaborated more and more precisely so the work can be done properly.
22. A Work Breakdown Structure (WBS) is a technique that helps us break down the project into smaller and smaller manageable pieces. We call them elements, and the smallest component is what we call a work package. A work package is a well-defined piece of work that is easily understood, planned and managed.

23. In the Customizable and Adaptable Methodology for Managing Projects™, operational requirements would be part of the operational readiness stage of project delivery, which is at a later stage. However, for this hypothetical project, because of the volunteer service component, we need to consider operational requirements early so that the stakeholders understand the full vision.
24. Each building will require equipment rooms for electrical systems and equipment such as water pumps, air-conditioning compressors, and heaters. These maintain the facility from a central location.
25. In the project management plan (project launch stage) we ask how to define the project. In the project definition stage, we include the definition (the detailed plan).
26. The project detailed plan is the major deliverable required at the end of this stage. Other project management literature refers to this same deliverable as a project plan or a detailed plan, among other terms. Specific industries also use different names.
27. There are various possible contractual approaches. One way is to award the design work to an engineering consultant, and once this work is done, award a construction contract to a contractor. An alternate approach is to award a design/build contract, where one company performs both design and construction. This company probably would purchase the construction materials as well.
28. Refer back to Chapter 9
29. RACI stands for Responsible, Accountable, Consulted, and Informed, which help us define the various roles that are required. For further information, see http://en.wikipedia.org/wiki/Responsibility_assignment_matrix.
30. *Project control* includes all the activities carried out by the project management team to keep the work on track in accordance with the project management plan. Some of these activities are *corrective actions* in case of deviations from the plan, or *preventive actions*, proactive steps taken to avoid deviations from the plan.
31. In the story, Nour is the baby that Qudss delivered recently
32. In the story, there is more information here but not relevant to project management so we deleted them
33. Mr. Faisal is the CEO of the firm where Qudss and Furat works and he is supporting the project
34. We debated whether to delete most of this chapter since it is mostly story telling rather than project management but we decided to keep it as we close this e-book with a personal touch.
35. Nour is Arabic for 'light', like in sunlight