The Proactive Project Manager

By Brad Egeland

Proactive. What does it mean to you? A check into its definition reveals this: "creating or controlling a situation by causing something to happen rather than responding to it after it has happened." Sounds correct. What I would like to discuss here is ways we can be proactive on the projects we are managing and, thus, remain more in control of them, rather than always being in reactive mode to the issues that arise and threaten to knock us off course.

Three big areas where passive management can get a PM into trouble – in my opinion – are customer management, risk management and budget oversight. So, I would like to focus on these three and how we can hopefully avoid issues – at least major issues – by practicing proactive, rather than reactive management in these areas.

Proactive Customer Engagement

I think we sometimes take for granted that our customers are very interested in the project, and it's success. And usually they are. But not always. Sometimes the project sponsor has a million other things going on at the same time. Sometimes the project was pushed on him, and he's more interested in his "day job" activities. There can be many reasons why the project sponsor or the project customer as a whole seems disengaged from the project or uninterested in what's going on. But it's your job to do whatever you can to keep them engaged as much as possible because you need them available. You need them for decision-making, information sharing, requirements confirmation, business process definition, testing, etc. You need them. The best way I've found is to keep tasks on their plate – things that they must report on during each weekly project status call. And if that doesn't work, go up their chain of command until you find someone who will ensure they remain engaged...sooner or later you'll find that right individual – probably at the executive level.

Proactive Risk Management

Risk management seems like a chore to most of us – worrying about things before they actually happen seems overkill to some. But it's not. I can tell you that, without fail, the projects where my team and I have spent the most time planning for and managing risks have also been the most successful projects that I've managed. Things still happen, but usually they are things we've anticipated –
or related issues – and we already have a good action plan in place for avoiding their impact to the project...or at least mitigating it. In one instance, we were concerned about server failure at the client site on a technical project we were managing, so we had an action plan ready. When it actually did happen, we were able to mitigate the affects to the project and schedule by switching services to our site until the customer site was once again prepared to handle the load. And since this happened just prior to user acceptance testing (UAT) the affect to the project could have been tremendous...but it was not...thankfully.

**Proactive Budget Management**

Finally, budget management is another area where proactive management can really save the day. And this one is easy. Too many project managers pay little attention to the budget until it's too late. I'm not saying you have to manage it all in the project schedule with dollars loaded to each task and resource. In fact, I almost never go that route. I use a fairly simple spreadsheet tool/template that I created as a resource and budget forecasting tool. But by managing it weekly – or more often on larger engagements – and updating it with actuals every week, I ensure that the budget is being watched closely and that it never enters a danger zone without me first knowing it's heading there...which gives me, my team and the project customer time to take corrective action collectively and collaboratively.

**Summary**

If we fail to plan well and be proactive on the projects we manage, then we will never really be in control. Someone else will be – or we will continually succumb to chaos at the very least. Success will come from luck rather than skill, planning and good sense. And success will be much, much harder to replicate. Plan well be proactive and remain in control.

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