



## **Managing the Project Document**

### **The importance of an effective document management strategy for project success**

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#### **Overview**

During the life cycle of a typical project, a project manager can produce up to fifty different types of documents to facilitate the planning, tracking and reporting of the project. Documents range from feasibility studies, resource plans, financial plans and project plans, to supplier contracts, post-implementation reviews, change request forms and project status reports. The fact is, the manner in which project documents are managed by project leaders can either be the driving force behind a project's success or be the bottleneck that often places a project in despair resulting in its failure to meet its time line, budget and scope.

In this paper, I will be discussing the power behind an effective document management strategy for project managers and its pragmatic impact on improving your visibility into a project's status so that you can better respond to the inevitable reality of change occurring in your day to day work.

#### **The Role of the Project Document**

The primary role of a project manager is to manage the unexpected. The concept of planning by its very nature is designed to mitigate and manage the unexpected. As a part of the planning process, most project managers would agree that the project document plays a central role in strategically developing the best possible plan and to effectively communicate progress and status updates to all related stakeholders. More importantly, the manner in which the project document is managed will determine a project manager's effectiveness in responding to the unexpected.

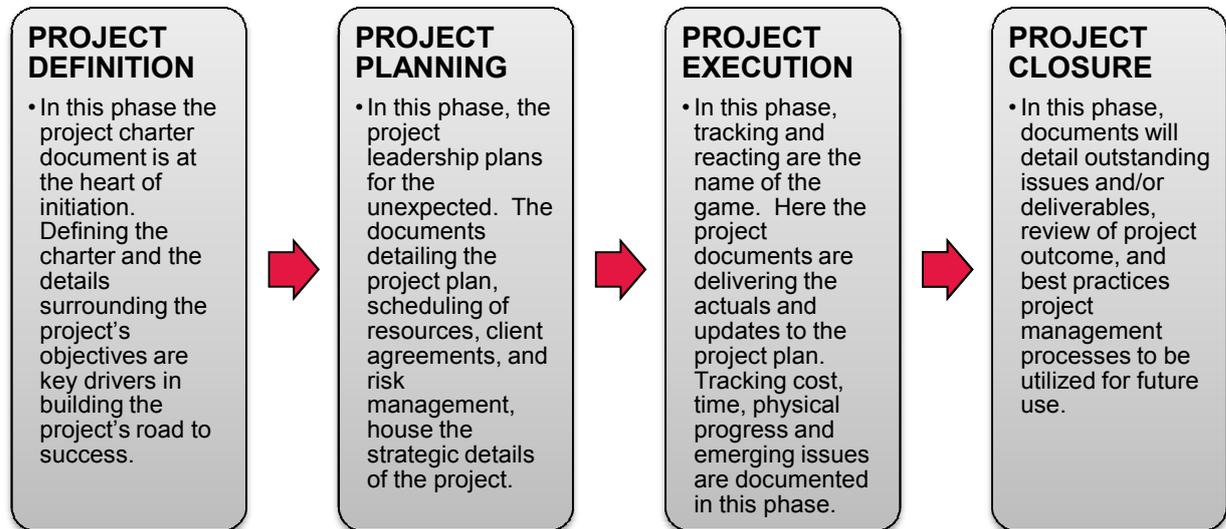
Prior to discussing the management of the project document, let us define the "Project Document" and how it fits within a typical organization's project management workflow.

The project document is a self-contained document that details your organization's unique steps in initiating, planning, executing and closing projects. In fact, the chosen project document types, the format they are produced and the manner in which they are organized, in their very essence, is what makes your organization different in delivering projects.

Experienced project practitioners are excellent in "Templatizing" their project documents. The reuse of successful project plans, complex business case documents, standard contracts, detailed specification sheets, and project status reports are necessary for a project manager's effectiveness in balancing the evils of unmanageable paperwork that can impede their ability to focus on their core competencies of managing the project and the involved stakeholders. However, a project template is only as good as the individual managing its use. What sets apart great project managers from good project managers is their ability to minimize their administrative role in producing project documents while maximizing their strategic role in managing the people that will deliver a successful project.

In order to achieve this, project managers must follow some basic rules in developing key project documents covering all phases of a project's lifecycle.

Although the project document workflow will vary from organization to organization, good project managers will develop a number of basic project documents in order to maintain high standards in the delivery of projects. A standardization of the documentation is typically seen in the following project phases:



Once again, these project phases are guidelines to what document types play a critical role within the project lifecycle. In the upcoming sections of this paper, I will be highlighting the obstacles created by a poor document management strategy and how these issues can be addressed with the right strategy in place.

### **Document Mayhem**

Paper Pusher! Bureaucrat! Those are the last words a project manager would want to be labelled as. The reality is, ineffective project managers can easily fall into the trap of producing piles of paperwork that can cloud their judgement leading to the inevitable demise of a project. When poorly managed, the project document can easily be used to conceal the reality of a project's status, create confusion and frustrate those who want answers, as well as those who need to deliver. In fact, the wrong use of a project document can minimize the strategic value project managers play in a project's outcome. It is for this very reason identifying the project document bottlenecks are as important as the effective use of project documents.

The primary issue project managers' face when managing the multitude of documents is the sheer volume of information that is contained in all the project documents that needs to be shared among all project stakeholders. Although the collection of project information is essential, many project managers are challenged with the ability to effectively access the most relevant information across all project documents to quickly respond to project bottlenecks and provide status updates to their stakeholders.

The reasons for this predicament lies in the typical manner most organizations treat their project documentation. Most project organizations do not have a document strategy in place to ensure the consolidation of information and the movement of

project documents among project stakeholders. As a result, the poorly managed project documents produce the following symptoms:

- **Lack of Visibility** – Project managers and stakeholders have an unclear picture of project statuses and all related work. Project documents are treated as self-contained islands of information that do not exchange information between one and another. Moreover, these documents result in redundancy of information contributing to the lack of visibility.
- **Weak Security** – Poor security measures are in place with no business rules and workflows to treat sensitive documents. This can result in critical project information ending up in the wrong hands and ultimately derailing a project's objectives.
- **Loss of Data** – Many project management organizations do not have the processes and ability to store all their project documentation in a single repository. Typically, the information in these documents can be potentially lost, difficult to access and can contribute to the lack of data integrity that could potentially end up in decision-making reports.
- **Limited Collaboration** - Project documents (e.g. spreadsheets) are often managed as unstructured data sitting in emails, on desktops and in paper format. More often than not, project documents are not easily shared among project stakeholders that may need to access information from multiple locations.

Identify the issues surrounding document management is an important first step in eliminating document mayhem in your projects. The next step is to adopt a best practices approach developed by document management experts whose business is to streamline the management of documents.

## **Document Utopia**

In an ideal world, project practitioners would be able to capture the finest of details in their project documents, while still having the ability to retrieve the most relevant information when needed. Prior to adopting a document management strategy, project practitioners need to incorporate the role they play as a “Knowledge Worker.” What is a Knowledge Worker?

“Every knowledge worker in modern organization is an "executive" if, by virtue of his position or knowledge, he is responsible for a contribution that materially affects the capacity of the organization to perform and to obtain results.” - Peter Drucker in [The Effective Executive \(1966\)](#)

With the understanding that the success of projects are inextricably linked to a project leaders ability to retrieve the most relevant information in the project documents created to make well-informed decisions, document management no longer plays a supporting role in a project leaders daily work.

With this in mind, experts in Enterprise Content Management and Document Management strategies employ best practices in the storing, managing and tracking of

documents and records to empower businesses in cultivating “knowledge workers” that are at the forefront of their organizations.

Here are some of the best practice elements found in the Document Management world that can be applied to project management practitioners:

- **Document Capture** – the ability to effectively capture electronic and paper documents of different formats in a central repository. Capturing documents, are not only about storing information in an organized manner, but also the ability to easily retrieve relevant document information, and archive historical data.
- **Version Control** – the ability to provide check-in and check-out options, and provide different levels of security, such as read and write access to ensure the integrity of the data that resides in the stored documents.
- **Workflows** – the ability to design and apply configurable workflows that map to the business processes and approval workflow of documents in your organizations.
- **Reporting and Analysis** – the ability to exchange information between documents, as well as consolidate data in multiple documents for reporting and analysis purposes to provide better visibility across your organization.
- **Collaboration** – the ability to share documents among relevant stakeholders, as well as restrict the documents to those who should not have access.

These best practices are even more relevant to the project manager whose typical workday revolves around the project documents they create to deliver the value-add they bring to the successful execution of the projects under their wing.

### **The Author**

Neil Stolovitsky has 10 years of IT experience with end-user, consulting, and vendor organizations, along with extensive expertise in business development, software selection, and channel strategies. Stolovitsky has published numerous white papers and articles covering Enterprise Resource Planning (ERP) for service industries, Project Portfolio Management, Professional Services Automation, IT governance, and new product development to a global audience. Neil is currently a Senior Solution Specialist with Genius Inside.

### **About Genius Project - Best Practices in Managing Project Documents**

Genius Project is a Project Portfolio Management solution that incorporates a best practices approach in document management. It empowers project management practitioners in their ability to work better with the project documents they interface with on a daily basis. Genius Project embraces the following document management capabilities:

- Offers a central repository housing all project documents mapped to your project management processes and plans

- All primary records created in the solution are converted into distinct documents
- Provides flexibility to store, edit, track and allowing versioning of all Genius Projects documents and existing documents in your organization (e.g. spreadsheets, plans, etc.)
- Increased visibility by allowing the consolidation of information found in created documents
- Provides the ability to configure multiple workflows for project documents
- Delivers security capabilities, such as, read and write access and to project documents

To learn more about Genius Project and its document management capabilities please go to:

[http://www.geniusinside.com/solutions/software\\_features/project\\_document\\_management](http://www.geniusinside.com/solutions/software_features/project_document_management)