

Cocktail Napkin Project Management



Janet Burns, PMP

July 20, 2009

Agenda

- How it all began
- Why use CNPM?
- What does it look like?
- How can you make it work for you?
- A few samples
- Q&A



The Beginning



- Trying to set up a PMO at the New York Times company:
 - A combination of an informal, relationship-based culture and....
 - Complex methodologies with
 - 20 page charter templates
 - 4 day training sessions
 - Lots of “must-do, or else”
 - Rigidity
 - One size fits all projects
 - No training for project stakeholders

What was wrong?

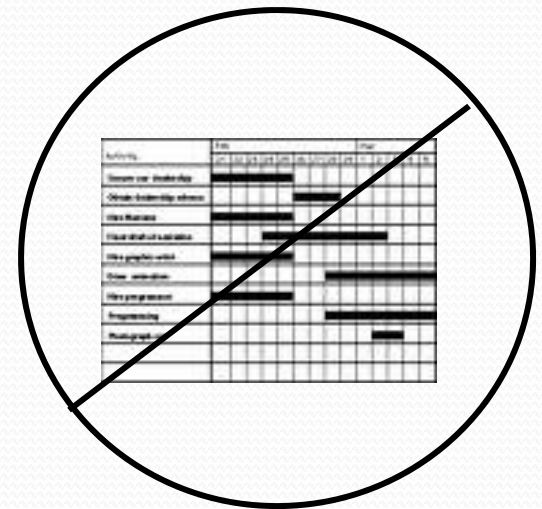


- People felt inadequate
- PM's did not ask questions, blindly tried to follow along since it was senior management initiative (so support from the top is not ALL you need)
- Turnoff from the PM lingo – was not “relate-able” to all project stakeholders
- Projects were too diverse and the process did not always apply

Not Process Friendly????



- Creative organizations
- Small companies
- Informal organizations
- Family run organizations
- Non-profits
- Academic organizations



And so CNPM was born



- We had to find something to get people interested
- Needed a greatly simplified approach to project management methodology
- Put the focus on core concepts
- Short, simple, flexible, tailored, custom, even disposable
- Introduced CNPM on International Project Management day, November 2005

You have to work within the culture



“You never change something by fighting the existing reality. To change something, build a new model that makes the existing model obsolete”

Buckminster Fuller

Theory of CNPM



- The term “back of a napkin”, or sometimes “back of an envelope” refers to the act of drawing up an idea on a napkin, most likely in an informal setting.
- It can also be read as taking shortcuts - only taking enough time to document something important on the back of a napkin.
- The reality today is that we all have less time to execute projects, and those of us charged with selling the concept of project management have very minimal time to sell our beliefs.
- Hence, the need to choose only the key ingredients, such that our process will fit on the back of a cocktail napkin.

Fine print



- This is not to say that an organization cannot embrace the full complement of project management processes...
- It just has to happen in due course, depending on the company culture, willingness to change, and other decision drivers
- The cocktail napkin concept provides a simple way to *begin* selling project management concepts. The key is to focus on the basic needs without overwhelming your audience with too much process and complexity.

How to create your cocktail napkin

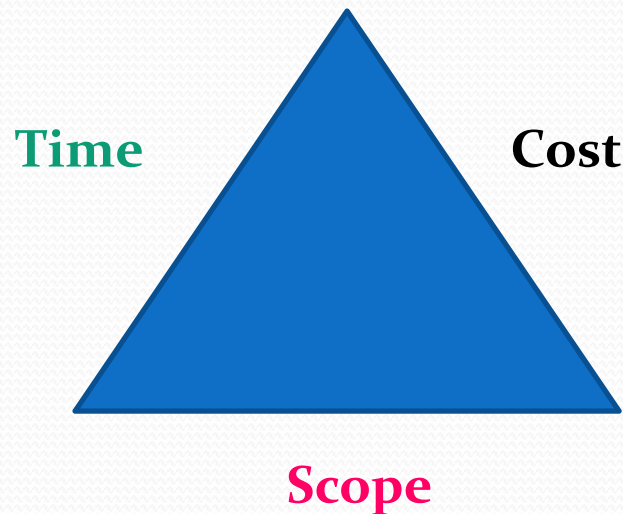


- **The Cocktail Napkin Process**
- As you sift through the mass of project management methodologies and philosophies, we have to ask some questions:
- What are the key tools to drive project success
- What does my organization value?
- What information must I have to understand my project?
- How can I make the information usable to ALL project stakeholders?
- What is the CORE of project management?

Here's a good start..



- Thinking about the core brings up some project management keystones: for example, the triple constraint theory



CNPM and the triple constraint



- Working under the assumption that managing the elements of the triple constraint leads to successful projects, our cocktail napkin should contain tools for each element, including:
- **Scope** – A project charter describing business needs, project requirements, including what is in *and* out of scope is a simple direct way to define focus
- **Time** – As PM's we've been trained to work with project schedules, but a simple schedule, focusing on milestones, and not necessarily needing a sophisticated scheduling software would also work
- **Cost** – A basic spreadsheet to assist in estimating cost including the amount of resource hours we will need, will go a long way in the cost management effort

More of the “core”



Another keystone of project management to consider is communication – some say project management is 90% communication.

This means that a piece of our cocktail napkin approach should be a simple process for continuous communication and updates of our project documents.

The simplicity of the documents themselves should lend to more participation from project team members and sponsors, thus facilitating communication and collaboration.

Examples: 1 page status reports (signal, not noise)
 Short, stand up project meetings
 Dashboards

Sample applications of CNPM



- PM Roadmap – NY Times project methodology
 - One page project charter
 - Status report template
 - Milestone charts in Excel
 - WBS workshops using post-it notes

Sample applications of CNPM



- Viacom /MTV
 - Simple version of a SDLC (Software Development Life Cycle)
 - One page requirements document focused on business needs
 - One page monthly dash board status
 - Go-live template for new software into production

Sample applications of CNPM



- Large Six Sigma Program in an academic environment
 - 3 steps – Define, Analyze, Recommend
 - One page charter, eliminate unnecessary fields
 - Simple business case template to document cost savings
 - One page status report on Sharepoint
 - Issues tracking on Sharepoint

So remember the CNPM attributes to apply



- Make it simple
- Tailor it
- Make sure it is available in different sizes and colors
- Make it readily available for all stakeholders
- Make it disposable!



And...

“If you're not failing every now and again, it's a sign you're not doing anything very innovative.”

Woody Allen

A final thought....



“Just because something is tradition doesn't make it right.”

Anthony J. D'Angelo



Thank you!!!

Janet Burns, PMP

burns5133@yahoo.com

609 213-8975