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Implementing Lean Marketing Systems



One Page Project Manager

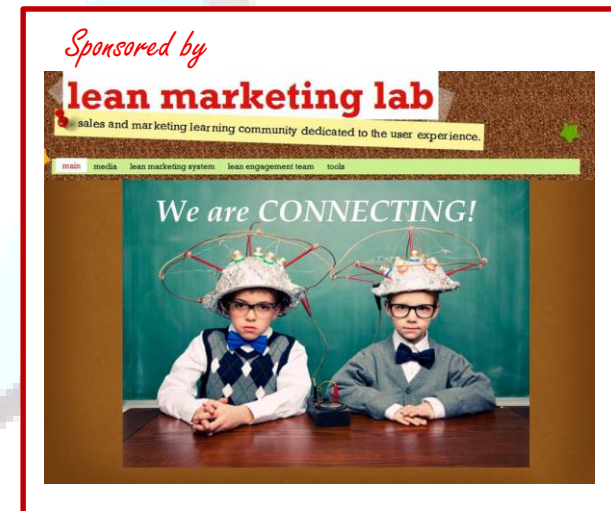
Guest was Mick Campbell

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Mick Campbell, MBA is co-founder and Managing Partner of OPPM International. With 20 years of experience rooted in project management, innovation and technology, Mick helps individuals and organizations with leadership and communication to substantially improve project performance. Focusing on project innovation, Mick facilitates highly interactive sessions and workshops for PMI and AAPM certification requirements.



With a BS from the University of Utah and MBA in Technology Management from Westminster College, he has directed project and sales responsibilities in small and large high tech companies. With certifications in Traditional and Agile Project Management and from Cisco, Mick brings a rich portfolio of both technical and qualitative experience.

The New One-Page Project Manager demonstrates how to efficiently and effectively communicate essential elements of a project's status. An OPPM template reduces any project—no matter how large or complicated—to a simple one-page document, perfect for communicating to upper management and other project stakeholders. Now in its Second Edition, this practical guide, currently saving time and effort in thousands of organizations worldwide, has itself, been simplified, then refined and extended to include the innovative AgileOPPM™.



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Joe: Welcome, everyone. This is Joe Dager, the host of the Business901 podcast. With me, today is Mick Campbell. He is the co-founder and a managing partner of OPPM International, which stands for One-Page Project Manager, and, co-author of the most recent One-Page Project Manager book that includes updates, the original version, and a section on using the One-Page Project Manager in an agile type environment. I would like to welcome you, Mick, and would you start out by updating me on the four books and what is going on with them?

Mick: I would love to. I appreciate, Joe, the invitation to be with you today and with the audience and I look forward to our conversation. The One-Page Project Manager series of books have been well accepted in many different areas and were first published by Wylie some years ago with the green book. The original One-Page Project Manager. That was followed with the yellow book, the One-Page Project Manager for IT Projects, two years later. Two years after that, a red book was published the One-Page Project Manager for Execution.

The compilation of those three books and our best thinking was then summarized into the new One-Page Project Manager which replaces the first two books and adds elements of OPPM both from a traditional project standpoint, as well as an agile project standpoint. So, we have been well received and are pleasantly surprised at the acceptance and adoption of the new book out in the world at large. So, thanks for having me.

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Joe: I think I was the first reviewer on the original One-Page Project Manager over six years ago on Amazon.

Mick: I think that's accurate. I think that is accurate. We went back and looked at that, and that is a fun connection to have.

Joe: I was struggling trying to create a one-page document to give to clients. I had tried this out and built one up in Excel on my own, then I ran across this book and I said, "This is better than mine."

Mick: Thank you.

Joe: When you first think about an Excel document in project management, you think of a simplified version of Microsoft Project. However, I think the One-Page Project Manager wasn't exactly a project manager document to begin with. It was based on an X matrix and was a reporting tool, wasn't it?

Mick: It absolutely was. If we go back in time to 1985 if you can remember that far back. I know you and I can, probably some of our listeners may not, but at that time we had a transition in the organization from a manager who was a micro-manager in his nature, to a manager or President/CEO of the company, to be specific, who was not. In the context of a project he said, "Here's ten million dollars to execute this particular project. Keep me posted." So, as a team we had to devise a way to communicate to a person who was not

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interested in the details.

As you stated, clearly we are interested and needed to follow and manage and track and use multiple tools to do that. Invariably, some of the reporting elements that would come out of those tools that we'd hand to management were not clearly understood, not intuitive and in general, missed the mark in communication.

So, this genesis of, back then as you called it, we actually called it the Matrix report, not the little blue pill one, that we've seen the film on, but the Matrix report and then changed it the One-Page Project Manager several years later. It became a standard for reporting project status to stakeholders who don't need all the details.

Joe: I think it's better than a reporting thing. I have always used it as a communication tool. I think, it raises questions, allows things to move around, assigns a lot of responsibilities and you can even do some "what ifs" with it if you would like. How has it developed in your mind? It's much more than a reporting tool isn't it?

Mick: It really is. In our new book, as we thought on how to get the idea of communication to the market in general, we used the analogy of a watch face. For anyone who flies knows that still dials are well used, despite all the electronics that we can still put into our planes. It is because they communicate so crisply.

So, we used that analogy to say that communication if I take one step back, communication is the great statistical difference maker in, certainly, in project success and

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we would probably take, even, a step back and say in business and life and other elements. Our ability to communicate well provides for us an opportunity for success.

Recognizing that you have hit the nail on the head identifying that the One-Page Project Manager, albeit, the genesis of a report, facilitates for communication, pushing really, a lot of, what we might call from a Lean perspective, non-value added work out of our communication and making it intuitive.

You look at your watch, you don't do calculations, you just have a general sense if you've got a meeting at 11:30 and you're looking at your watch, and it's 11:00 you know in your gut how long a half an hour is how many different things you might be able to accomplish before that.

We wanted to have the OPPM, the One-Page Project Manager, be just that. A communication tool that, when provided to any individual, they might look at it and have a sense intuitively as to what's going on, what's the status, how are we doing, what areas might we need some more help on, or, at a high level, you were spot on.

It's a tool that facilitates communication. We've had a woman send us her daughter's wedding on an OPPM and maybe a little bit later I can tell the listeners how the effort to put Governor Romney in the White House from a transition team was done on OPPMs as well.

Joe: Well, I've noticed through the years the flexibility that the document has because it's

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based on Excel. I think that have I ever used it, and I did reconfigure it slightly and is that typical? Have most people made it their own through use?

Mick: They have. They've used it as a core template and then adopted it to the norms of their organizational needs.

Joe: And, do you think that is the strength of it?

Mick: I do. I look at it, and I had an interesting call one day from a program manager for a small, little organization up in Redmond, Washington, some of us might be familiar with. He's in charge of Microsoft project. A brilliant person, and in our conversation it stemmed into this idea that this simple One-Page Project Manager was something that, intuitively, they wouldn't, or didn't currently provide. It is being adopted.

When the books had some success, Wylie, our publisher, came back and asked us, "Why is it working?" I will be completely honest with you, this is a little bit of behind the curtains truth, we didn't know all the answers initially, as to the "why?" We had created it, it had been moving forward, it found adoption but, we then began to understand that there is power in pictures when you communicate.

Pictures are so much more communicative than are words and/or numbers, even. Then we found that there's a necessity for simplicity coupled with pictures. And, as those two elements came together in a format that, when I am across the world talking about project work, when I ask people, "What's your number one project tool?" As you would probably

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guess, they say, "Excel." Just as you've said.

So, the fact of the matter that's in the tool that they're already used to using, and it provides them an opportunity not to rip and replace some of these other more robust tools that they may need to facilitate the project work, it just lays on top and can be used in coordination or conjunction with.

Joe: I think it is so adaptable because it went through a lot of changes within Excel and maintained its integrity, hasn't it?

Mick: It has. The core matrix, or that built off that X chart has stayed, but there have been little iterative changes over the years, and our best thinking shows those in the new book. Most interestingly are the changes that were necessary to take it from a traditional standpoint and make it as powerful and useful from an agile standpoint.

Joe: Well, and the new book has come out to include Agile. I thought it was a great step. It never was a waterfall or a Gantt chart project manager, it always was more of a communication tool, and it was very agile in nature.

Mick: You bet. It really was. As you come to understand it or, as you have done, read the books you know that much of the conclusions that go onto the document itself come from the team. The collaboration that takes place among peers and different people who have ownership in accomplishing the work, everybody has got to be in alignment and in agreement before that gets communicated, and certainly from an agile communication

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standpoint, you're right. That is native to the actual experience of working through the use of an OPPM.

Joe: I have a couple of real basic questions for you. One of them is when I pick up the book, does the book teach me about project management? Or, does it just teach me about the project manager?

Mick: The book itself is an attempt to provide some simplification to the work of projects so that you can have a context to think about it and then apply that to the use and creation of the One-Page Project Manager.

We view projects as having five essential parts. For people who have gone out and studied project management institutes, PMP methodology you're well attuned and understanding the five process groups, well it used to be nine knowledge areas, now with the new release this year ten knowledge areas as they added stakeholders to that relationship. Then we would identify inside of those all the different nuances that are required from a PMI's perspective to execute the project. I think that's wonderful thinking.

We tend to simplify it down to say that projects, in general, have five basic parts and we speak to those, and it's the understanding that it takes twelve steps to create an OPPM that you walk through with the team. Once those are done you have a communication tool that communicates the plan. So, the first step is it communicates the plan.

Next we teach just five reporting steps to the already now created OPPM. Those five

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reporting steps simply stated communicate progress to the already communicated plan. So, as I move through that, that's my expectation. The book, itself, again, teaches five basic core fundamental ideas in project work, twelve steps to create an OPPM, five steps to be used to report an OPPM to improve communication.

Joe: Has anyone ever claimed that there is too much information on a page?

Mick: That's an interesting conversation. I recall a wonderful, in-depth conversation with a friend of mine at Texas Instruments whom I've come to know. He talked about using the OPPM as a front door step, as a boiler plate. As something that would draw in attention and then he wanted to have cells that you could click and find a litany of data in and behind that. That is as you would expect, because he is a detail oriented person.

One of the best thinkers and probably most successful project management writers, a gentleman by the name of Harold Kerzner has talked about an idea that we like and use, and he mentions it in some praise for some of our books. That executives, those who are making decisions have so much information to look at, and we, ourselves, we've got hundreds of web sites, we have multiple news publications, who know how many cable stations or satellite stations we have at our disposal, how many e-mail accounts you manage personally. We are inundated with information and so, how do we parse through that?

The idea being that when he goes out and does some things he causes that people write up a report, and invariably it is multiple pages and people have beautiful documentation that

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accompanies it, at the end of that he throws all this away to make a singular statement that I'll share with everyone. I love this statement. I think it's applicable to your comment about too much information on one page.

He says that if there is a paper clip around it or a staple through it they won't read it. So, we took that and applied it directly to our thinking, saying that you can't choose or scrunch down your fonts size, you've got to keep it legible, and that, actually, for most of us who are detail oriented, which many people in the project world are, that becomes quite a bit of a struggle. In fact, when we're out talking about the One-Page Project Manager that is sometimes the hardest thing for people to do is to try to determine how much information they're going to put and what information is salient.

Joe: I look at it a lot as an A3 and as a cover document, a summary document over the top and, of course, it may not be able to express every detail in its entirety, but if you have a hyperlink or you have a place to go to find the rest, the people who need that can go get it.

Mick: You bet. I think your point about adoption, people have been able to use it as a core idea and build on it for their own organizational needs.

Joe: What are the limitations of it, then?

Mick: Because it is one page it can't communicate everything. You have to choose the elements, or think of it as high level tasks, or high level deliverables that you're going to

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track or watch or the elements of risk or opportunity that you, maybe, want to communicate to the project team.

That, to some degree for some people, in and of its nature does not provide them as much information as they would want, because of that we've learned and found ways to cascade them in what we call Level One, Two and Three. One being a high level, two being taking a singular line item and extrapolating that into a secondary document and the subsequent tertiary document if the need is present.

Joe: So, this is like the front cover of my file cabinet and it can maintain everything that 90% of us need but 10% is going to have to open the door.

Mick: Very well said. In fact, as I mentioned, it doesn't necessarily replace, at all, many of the tools whether they're off the shelf or home grown tools that organizations are using to facilitate the management of their projects. It just becomes a back to the point, communication vehicle to more clearly understand where people are.

Joe: You have an online version of this. Can you tell me a bit about that?

Mick: When we decided to create our business, in and around the One-Page Project Manager, we chose what I think is probably the best year to do that, 2008. We launched out on our own, and it was a wonderful growing and learning experience, and we have provided an expanded core set of templates that are downloadable on our website. Those, as you have already mentioned, are Excel-based and with several examples in PDF and

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other ways.

What we have found is organizations sometimes forget the how do I build this, and/or someone gets the template somewhere cascaded from someone and they go through the effort of trying to create or use it and, invariably, have sections that are left unfilled in and/or not tied to the other pieces. The document itself, from a design standpoint, everything connects, back and forth with one another.

So, to be able to do that our online tutorial is much like, maybe appropriate since it is tax season, a Turbo Tax. It takes you through a wizard to ask you those twelve different questions as to how you might create it, and as you fill those out, it automatically populates those into, either, a Web-based template that you can manage and/or once you use that to create your OPPM what we've found is that people use that to create it and then just download it into Excel, tweak it a little bit for their organization and fire it off and use it throughout the course of their projects.

Joe: Okay, so I can go in there and customize it and still have all these things in Excel after using it. It is just not all up in the cloud.

Mick: That's right. You have the option of leaving it in the cloud and getting e-mail reminders. As you stated, a lot of people use, we call it My OPPM, use My OPPM as just a creation engine to facilitate the first document. Remember once you're done with those that communicate the plan and then they download in Excel and then use that ongoing to communicate performance to the plan.

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Joe: OPPM, the corporation is more than just the One-Page Project Manager. What else do you do?

Mick: We have started out with the books and as we have learned, unless you're J.K. Rowling or Michael Crichton most people don't write books to make money. Books are a wonderful opportunity to validate some ideas and to share those with the community at large. In this case mostly the business community for us.

The books have been a wonderful effort, and we continue to be grateful to have our connection as I mentioned, with Wylie our publisher to facilitate our books out there. That's the first element of the business.

The second element is the Web deliverables. We talked about the forms, the templates that are available for download and we've had just a wonderful interaction internationally with those going all around the world being used in projects, small and large, back and forth. That community has grown. That, also, has expanded, as you mentioned, to the My OPPM offering, which is that wizard-based creation tool for OPPMs online as well.

So, we have the books and the online offerings. I spend a significant portion of my time out in the world of training and coaching. Where I am out, some of my other team members are out talking to project people and executives about simplification and communication improvement in the realm of projects, of course. I think I was in about 26 cities this last year having a conversation with hundreds and hundreds of professionals

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about that.

Then, as you would guess, the old horse and cart scenario is we spend some time in-house with organizations who get exposure to any of those three previously mentioned areas of business focus and then we come in and do a little bit of, whether it is customized training or particular consulting with different organizations.

It's been a ton of fun to continue to grow the business, and like many of you who are entrepreneurial in your nature, you probably feel the same pull that I do in my company is that you have multiple irons in the fire all of which are yielding something, and you have to choose where you can focus your effort because we don't have teams of dozens and dozens of people sitting around looking to us to assign them something to do. So, it's been a wonderful growth of the business in those four basic areas.

Joe: I noticed that you have a video for entrepreneurs on your website. Should an entrepreneur use the project plan? Should he use the One-Page Project Manager?

Mick: We've found that little bit of thinking structure helps in a tremendous way. It helps us in our efforts, so, just from essentially stepping in our own glue buckets over time we've tried to share and help other people not have to step in the same ones. So, it becomes a wonderful tool for focusing your efforts and energies in an area that will yield the most for your effort.

Joe: So, what's upcoming for OPPM?

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Mick: That's a fun topic for us right now. We are just finishing up a. .. it's a historical document. We have an opportunity to have the One-Page Project Manager be used by Mike Leavitt. He was a three-term governor of my home state of Utah, and during Bush he was asked to be Health and Human Services Secretary.

You can imagine, if any of us was asked to head up that type of department and all the litany of activity and projects that were going on from Medicare and Medicaid to the international pandemic planning and the Center for Disease Control and Prevention, he wanted a simple way to understand how this work.

So, he found OPPM, asked us to help them and for many years, the OPPMs were used to communicate, for example, International Pandemic Planning. Then, when the Obama administration took over, and Kathleen Sebelius was asked to be secretary in the first term, Governor Leavitt was able to hand all those documents to her. Well, he was asked to head up the effort for Governor Romney's attempt at the presidency. As we are not partisan, we have a little joke to say, "We don't work for red states or blue states, particularly, we work for both because, oddly enough they both pay with green money."

We've worked for the National Science Foundation helping some of the global warming team communicates more successfully back to Washington, and as I'm telling this little story now, we, obviously had some efforts with the Romney transition team. But, our job was not to talk about politics; our job was to talk with the transition team on how to communicate project work successfully.

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We had over a hundred OPPMs that would roll up to one singular OPPM which Governor Romney would review every Monday afternoon to assess the status of the transition team that was being put together and executing the work to stand up the United States of America government on OPPMs.

So, we couldn't be more ecstatic and thrilled, and that book is in the finalization, actually, this week as we're talking a publication and will then be out there and prominently features many of the OPPMs that were used and the efforts to share that. So, that was obviously a huge project of immense proportions, our entire government if you're listening to this from the United States of America.

Yet, as I mentioned earlier, we had feedback from a woman who did her own project work managing her daughter's wedding on an OPPM, so the future is wonderful and we're happy to be able to share that. Additionally, with just our new book that also, that template and that example out there to the world, as well.

Joe: That sounds pretty exciting.

Mick: It's more than exciting for us. It was a ton of fun. It's the first time in a long time that we'd been fired from something, Joe. Fired by the American people this time, unknowingly, but still you feel the effort.

Joe: You originally had a book on Lean IT using the OPPM. Then, in your execution book it

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was Lean orientated with how to use OPPM with A3s. Another part of Lean software especially in the agile has been Kanban. Is that something that the OPPM can be used with?

Mick: We initially, as you stated, thought OPPM was agile in its nature, which it is. From the perspective, the idea is you're pulling work instead of pushing work, and the opportunity, whether it's working with sticky notes and/or areas of communications where you've got teams that are co-located and you're expecting that this osmotic communication takes place, and you're information rated or set around the work areas to tell people what's going on.

Invariably, though, we found as we got into that world that there were not many good way to communicate to management what's going on. So, management would have their agile teams and they're out there doing the work and they'd want to know what's going on and the teams, themselves would say well come into our work areas, and you'll intuitively know by looking around.

For many of them, one, they wouldn't come, and two, they maybe weren't well versed enough to understand exactly what was happening. So, we, then had to re-craft what in its creation, in its teaming as an agile experience, but its reporting is different. So, we took the original and kind of had to scrap it, go through our own experience from a Scrum Master and a Kanban and a Lean thinking perspective and change the OPPM to mirror how agile projects are being run. We've received wonderful feedback from multiple organizations on their use of it to be able to help communicate more effectively.

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Joe: I think your document covers that well and most agile people, most software people should take a look at it and see if it fits them. Because, I think it's very unique in the way you did it.

Mick: Thanks. We spent some time. That went through a lot of iterations, I'll be honest. We had wonderful collaborations with some of the top thinkers whether it was Jim Highsmith or Alistair Colburn or others and, so that was helpful to make sure it was aligned to what people wanted to see.

Joe: Is there anything you would like to add to this conversation?

Mick: The only thing I'd love to add is as you think about what all of us are trying to accomplish, I think we started out in the right area, and we should close in that, it's about communicating more appropriately. I will be honest with you; this might be a tool that could be as I've heard from many people, the best tool they've ever found to use to communicate.

I've also had people on the total another side of that, who have said, "You know, this doesn't help me in the least." So, we are comfortable with either and would say to you that if it helps, fantastic. Use it, leverage it and find success in it.

If it doesn't fit, that's okay, too. We don't believe ourselves to be the answer to all things, but if there is a little opportunity to improve and enhance what you're already doing we'd

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love to see some more success on your part from our thinking.

Joe: Well, Mick, I would like to thank you much for your time and your generosity in giving us this information about the One-Page Project Manager. This podcast will be available in the Business901 on iTunes store and the Business901 blog site. So, thanks again.

Mick: Thank you. Have a great day.

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Joe Dager is president of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.