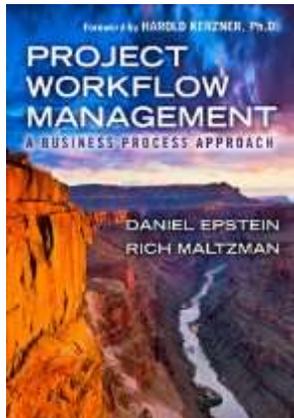


---

## PM WORLD BOOK REVIEW



Book Title: **Project Workflow Management, A Business Process Approach, 1st Edition**

Author: **Dan Epstein and Rich Maltzman**

Publisher: **J. Ross Publishing Company**

List Price: US\$89.95      Format: hard cover; 320 pages

Publication Date: 2014      ISBN: 978-1-60427-092-1 (hbk)

Reviewer: Rodger L. Martin, JD, MBA, BSEE, PMP

Review Date: Feb 2014

---

### Introduction to the Book

Dan Epstein and Rich Maltzman combine Project Management Methodology with Business Process techniques and Workflow Management. They provide detailed process diagrams with extensive narrative to explain the process steps. They touch on most of the concepts contained in the PMI PMBOK. However, they reorganize the methodology to improve on its application with business process and workflow concepts.

This is one of the few books that sensibly combines methodologies to produce a better approach. It is a welcome addition to the tools available for the practicing PMP.

### Overview of Book's Structure

An introductory section provides a Project Management Workflow Overview and introduces the process approach, using the concept of Frames instead of Phases as used in the PMBOK. This is a crucial and important concept. Phases imply stand-alone sets of activities. Frames provide a method for more iteration, which is how most projects actually proceed. There are four main frames, which contain various processes. A chapter is devoted to each associated process within that frame, including:

- Requirements (with 12 Processes)
- Planning/High-Level Design (with 15 Processes)
- Construction/Tracking (with 9 Processes) and
- Closing Testing (with 2 Processes).

Most of the book is devoted to the Requirements and Planning/High Level Design frames. Several form templates are provided throughout the book. The Appendix summarizes the Frames and the associated processes within the Frames. One high level diagram links the interaction of all Frames.

### **Highlights: What's New in this Book?**

An improved approach to Project Workflow Methodology packages the Frame approach with supporting processes. The book has no criticism of the inadequacies of the PMBOK approach to process interaction, although it should. The authors were very generous in not pointing out the shortfalls of the waterfall approach. The traditional waterfall approach to project management does not adequately handle the real world issues of process change. Although the PMBOK approach refers to cycles and feedback, in practice, it is too linear to include iterative processes. This book provides a well explained and enhanced approach.

### **Highlights: What I liked!**

The workflow approach with explanations and the form templates make the approach capable of implementation. Since more emphasis is placed on up-front effort in requirements gathering and high level design, it implies that estimates of cost, time and schedule will be achieved for more successful implementations. The point, however, was not clearly stated. This is the strength of this approach.

As an added benefit, the Foreword by Harold Kerzner, Ph.D, provides an excellent and entertaining recap of 12 "Laws" about how projects go bad.

### **Shortfalls: What was Missing?**

The major shortfall of the book was no reference to Volume II. For all of the details on the processes, the book is the theoretical starter (although well documented). That I include many suggestions for improvement does not diminish the contribution this book makes to effective workflow and process improvement relevant to Project Management.

So, the authors might consider a follow-up Volume II to provide implementation guidance. If the workflow is established, then the book's guidance works. There needs to be some advice on how to get it started. This is major "cultural" shift in approaching project management. It will take senior management and Project Management Office support to implement. Improvement change does not come easy.

The detailed Workflow approach is too complex to accomplish without proper tools. Paper forms are not a solution. There needs to be an extensive tools discussion. At a minimum, the tools needed for this approach to work efficiently and effectively include:

- Workflow software
  - Which allows for status reporting, assignments and automated notifications
  - Workflow software provides for automation of complex interrelated tasks
- Document management software
  - Which provides a searchable repository of information. It's just data if all you do is collect it.
  - Workflow software does not provide the independent access that can be achieved with a document management application. The assumption that a word processor, presentation and spreadsheet software package will be used is implied, but not leveraged.
- Database
  - Most of the data captured on forms should be entered into a searchable database for data mining. For a single project, paper forms might be acceptable, but the power of a business process and workflow is to leverage many projects across time for the organization. Information needs analysis to become knowledge.

Several players are described (more than just a Project Manager) indicating that this approach is for larger projects. But these techniques could be leveraged for smaller groups with many projects. Some insight into scaling for smaller project projects would be helpful.

There was no discussion about leveraging lessons learned, only that they would be captured. Nobody tracks lessons learned captured in a word document. They must be in a searchable database that can do analytics.

The approach is comprehensive, but might include some guidance on leveraging smaller wins rather than scoping out the full project. Innovation needs failure to be more successful. An iterative approach, which is described, is better suited to achieve overall success than the fallacious traditional approach that wants all of the requirements identified before any work is done. But that's another soap box.

There is a section devoted to Outsourcing, but no significant discussion on virtual team concepts. Any international company must deal with time differences and finding an effective method to produce meaningful work. A workflow driven process approach with proper tools allows the company to work in distributed teams.

### **Who might benefit from the Book?**

Although workflow is not new to me, to many of my colleagues, it is another "new" tool to learn. It takes workflow expertise to implement a workflow project, which is what this should turn into from a Program Management perspective. Since this a combinational

methodology, it is not for the project manager who needs to pass the PMP test. It is an approach for a seasoned Project Manager who has to deal with a broad range of customers, vendors, and internal team members. It would be an excellent resource for a company Project Management Office to implement and advise its PMs to achieve consistency.

## Conclusion

Great stuff! Sound principles! Just doesn't go far enough for the novice once the approach is attempted. A sequel should be written.

I recommend it if you are interested in taking project management to the next level.

---

## Author profiles:

Dan Epstein combines more than 25 years of experience in project management, working for several major Canadian and US corporations. He first started development of a PM workflow in 2003 and has used it in teaching PM classes at several universities.

Rich Maltzman has a BSEE and an MBA. He has directed several large projects including the 1996 Summer Olympics telecom effort. He is a co-author of the book *Green Project Management*, which won the PMI 2011 Cleland Award for literature. He is a contributor to the fifth edition of the PMBOK.

More about this book can be found at <http://www.jrosspub.com/project-workflow-management.html>.

*Editor's note: This book review was the result of cooperation between the publisher, PM World and the Dallas Chapter of the Project Management Institute (PMI Dallas Chapter – [www.pmidallas.org](http://www.pmidallas.org)). Publishers provide the books to PM World; books are delivered to the PMI Dallas Chapter, where they are offered free to PMI members to review; book reviews are published by PM World in the PM World Journal and PM World Library. PMI Dallas Chapter members are all mid-career professionals, the audience for most project management books. If you are an author or publisher of a project management-related book, and would like the book reviewed through this program, please contact [editor@pmworldjournal.net](mailto:editor@pmworldjournal.net).*

## About the Reviewer



### **Rodger Martin, JD, MBA, BSEE, PMP**

North Texas, USA



**Rodger Martin** has a broad background in business, law, engineering and Project Management. He is a retired US Air Force officer with expertise in rockets and National Ranges. His work experiences include government, military, public corporations, small business consulting and high-tech non-profit organizations. For the last 12 years, he has worked on Document Management, Knowledge Management and Process Management/Modeling projects for commercial companies. He acquired his PMP certification in 2007. He is also a certified Mediator.

*To see other works by Rodger Martin, visit his author showcase in the PM World Library at <http://pmworldlibrary.net/authors/rodger-martin/>.*