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Applying Project Management Processes
to Achieve Your Personal Dreams
Personal Story   by Anne Witherspoon

Applying Project Management Processes to Achieve Your Personal Dreams [1, 2]

Anne Witherspoon

Executive Summary

I had always wanted to write a book. In 2021, I decided to quit my job (without another one lined up) and write a book. As a PMP, I knew for this effort to be successful, I needed to apply project management methodology. With my husband as the only real stakeholder at initiation, I nevertheless realized early on that planning, execution and controlling were critical elements to achieve success. There were many unknowns and a high level of risk, but I knew the timing was right and I was ready. I had the initial goal of writing the book in two months, a loosely defined budget, and a release goal by end of year. None of these goals were achieved! So, was the project a failure? Absolutely not. I did ultimately complete the project and the lessons learned will serve me for the rest of my life. As I share my experiences, I share my belief that for any personal goal, applying the structure of project management processes can help ensure success. Project management processes serve us well not only in the professional world, but also in our own personal lives. By taking intentional, well thought out steps in all that we do, we can increase the odds that our dreams can be realized.

The Initiation of the Project of a Lifetime

In September of 2020, I was at a mountain retreat with some of my best friends. It had been a chaotic year for me. It wasn't just the pandemic that caused chaos in my life, it was also the fact that my company had endured a failed merger. As a result, our organization had three CEOs within a short period of time. We had been forced to lay off a few hundred people. Many initiatives had lost traction, people were emotionally drained and had reached burnout. I was managing a team of about 200 at the time and I felt very responsible for their engagement and well-being—as did my mid-level leaders. We were trying our best to keep everyone focused, feeling cared for and engaged. It was really

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hard. I had gotten to the point that I dreaded each and every day of work and I was so happy to be able to get away for a few days and catch up with my friends.

On the very last day before we were heading to the airport, I walked outside and sat by a creek by myself. I wanted to have just a few more moments of peace and calm before I had to return to reality the next day. I wanted to think about how grateful I was that I had a respite with my friends in one of the most beautiful places in the world. What happened next, I had never experienced before or since: I had an overwhelming sense of knowing and feeling that I needed to quit my job and write a book.

When we got on the plane a few hours later, I told my friends I was going to quit my job, but I didn't elaborate or share that I also planned to write a book. Then, Monday came and I went back to work. By the end of the year, we had yet another CEO and I had taken no steps to quit, but I told my husband that I was planning to quit in March (after bonuses were paid out). He was supportive.

In February, I was back in this beautiful place, skiing with my daughter. My boss called me and told me the company was making some organizational changes and what the impact was to my team and me. I knew the time had come and it was time to resign. I told him that I planned to resign in March based on the news he had shared. And, after coordinating with him and communicating with my team, I did leave in March.

My last day was on a Wednesday, so I decided to rest and recover a bit and begin writing as my full-time job beginning the next Monday. My plan was to write a book in two months, find a new job and publish the book by the end of the year. My executive coach had previously written a book and had introduced me to her publishing team. Other than that, I had no idea what I was doing, I just knew this was what I was supposed to do.

Interestingly enough, I had decided on the title: Unicorn Leadership. Here's what the *PMBOK Guide and The Standard for Project Management, 7th Edition* shares about leadership:

- "Leadership is not exclusive to any specific role."
- "Successful leadership enables someone to influence, motivate, direct and coach people under any condition."
- "Leadership should not be confused with authority."
- "Effective leadership draws from or combines elements of various styles of leadership. Documented leadership styles range from autocratic, democratic…directive, participative…."

I definitely agreed with all of that and I was determined to add "unicorn" to the list of leadership styles.

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Planning for Success

I felt like I had a clear vision and a compelling purpose in my life. According to *PMBOK Guide and The Standard for Project Management, 7th Edition*: "Every project has a purpose" and "a good vision is clear, concise and actionable—and inspires passion for the outcome."

I had been using a motto along the way that continued to inspire passion within me throughout the journey: #manifesttheuniverse. Establishing and maintaining the vision for this project seemed fairly clear and concise:

1. Quit current job   √
2. Write a book
3. Find a new job
4. Publish a book

Motivation is an important part of any project, and for me this included

- Achievement
- Challenge
- Belief in the work
- Making a difference
- Personal growth

As Monday rolled around and I began writing, I had my first meeting with the publishing team. I started to get an idea of the work breakdown structure and activity list. While there would be no formal communication plan during this initiative—no status reports, documented change requests, or PMO meetings—I realized I needed to start tracking the requirements, assumptions, next steps, decisions made and more.

I was the Project Sponsor and the Project Manager rolled into one. I would provide the decision leadership, but I would also see this project succeed from initiation to closing.

As I began meeting with the publishing team I learned more about the actual requirements and deliverables that were involved in taking an idea and putting it into a readable, sellable end product. From the minimum number of words and pages, to the definition of "trim", to size considerations, preferred font, front cover design, back cover copy and everything in between—this was going to be quite an undertaking!

I never really had a solid, pre-defined budget, which I realize is not prudent project management methodology—but initially I had no idea whatsoever what it might cost, so I just decided to believe I would tailor the approach as I learned more. The *PMBOK Guide*

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and The Standard for Project Management, 7th Edition states: "Tailoring an approach is iterative in nature and therefore a constant process itself during the project life cycle."

I received the contract from the publishing company to engage, so I signed it, wrote a check, and took a giant leap of faith (in myself).

The *PMBOK Guide and The Standard for Project Management, 7th Edition* says the following about Risk:

- "Risk appetite describes the degree of uncertainty an organization or individual is willing to accept in anticipation of a reward."

I had quit my job without another one lined up, which requires a fairly big risk appetite and began a book writing project of which I was quickly learning seemed far riskier. I had signed a contract and paid half of the estimated cost. And, now, one of the first decisions I had to make was whether to utilize a writing coach—which would be an additional cost.

According to the *PMBOK Guide and The Standard for Project Management, 7th Edition*: "Risk threshold is the measure of acceptable variation around an objective that reflects the risk appetite of the organization and stakeholders." I had to determine if it was riskier to utilize a writing coach and risk additional dollars spent or riskier to not utilize a writing coach and risk impacting the overall quality.

Per the *PMBOK Guide and The Standard for Project Management, 7th Edition:*

Quality

- "Entails ensuring project processes are appropriate and as effective as possible"
- "Includes the ability to satisfy the customer's stated or implied needs"
- Involves "satisfaction: does the deliverable elicit positive feedback from end users?"

I was determined to produce a quality book that would elicit positive feedback from readers. I also was emotionally intelligent (self-aware) enough to acknowledge that I had no idea what I was doing and a writing coach would only help me increase my likelihood of success.

As the *PMBOK Guide and The Standard for Project Management, 7th Edition states*: "a project rarely performs exactly as initially planned" and that was already turning out to be the case with this project.

I received a call from an executive recruiter who was looking for a replacement Chief Operations Officer at a wealth management company in Dallas. Based on the job description, I was completely qualified and very interested. It looked like exactly the right

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role for me. Within two weeks' time, I had interviewed with the recruiter, the founders and members of the team—and I had a job offer! During the interviews I had been very clear that I was writing a book entitled *Unicorn Leadership,* and that while I was willing to consider a job offer, I had to have at least six weeks total to try and finish this project. I knew if I didn't finish it now, I never would. The time was now or never! Amazingly, they were very accepting and supportive. Accepting this job that had dropped in my lap helped me rationalize the extreme risk I had initially taken by quitting my job and beginning the journey to publish a book. I felt like that would be one less distraction to my writing, because now I knew, I would have a job, I just needed to be laser focused on completing this project in the next month.

The *PMBOK Guide and The Standard for Project Management, 7th Edition* shares that "adaptability is the ability to respond to changing conditions" and "resiliency the ability to absorb impacts and recover quickly…" Only two weeks in and I was definitely learning the importance of adaptability and resiliency. Both are critical to anyone working on a project or living life! I was determined to adapt and adjust in whatever manner was required to bring all of this together. However, after only writing full time for two weeks, I now had a true project constraint: a start date at a new job in one month. The *PMBOK Guide and The Standard for Project Management, 7th Edition* discusses the concept of balancing competing constraints:

- "Constraints can take the form of fixed delivery dates, compliance to regulatory codes, a predetermined budget, quality policies, consideration of the bottom line..." and more.
- "Constraints may shift and change throughout the project".

Constraints would start to impact the project now, but I had no idea yet how constraints would impact this journey as I moved forward.

Executing for Excellence

For the next month, I sat down and wrote almost every single day. I simply tried to get as much out of my head and onto paper as possible. When the month was over, I sent what I had to my writing coach, checked in with the publishing team, and went shopping for new clothes for my new job!

I started my new job in May 2021, and it was like drinking from a fire hose. There was so much to learn, so many processes to refine—just a lot of fast-moving parts. I was enjoying it, but exhausted by the end of the week, but I knew I had to keep my dream in focus and continue to make progress on my book. Therefore, my weekends were spent communicating with my writing coach, reviewing edits and feedback, expanding ideas

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and continuing to write and refine the book. It was during this time that I really felt the impact of project dependencies.

The *PMBOK Guide and The Standard for Project Management, 7th Edition* defines an internal dependency as "a relationship between one or more project activities." Additionally, reminds us that "constraints may shift and change throughout the project."

I had so much going on with my full-time job, my kids and family, book edits and other commitments in my life that I was getting close to burn out. My writing coach was not only a wonderful mentor when it came to the actual writing part, she would also remind me to "take a break" and shared with me that my writing and quality was much better when I was rested and fresh. An important reminder for all of us throughout life when we try to take on too much and it actually becomes detrimental to the work we are doing.

The *PMBOK Guide and The Standard for Project Management, 7th Edition* reminds us that "self-awareness and self-management are required to remain calm and productive during difficult project circumstances." It was at this point that I realized that I was attempting to balance too many competing constraints and trying to manage too many dependencies for my initial goal of publishing a book by year end to be realistic. My initial estimates for "work effort, duration, costs, people and physical resources" were way off. As the *PMBOK Guide and The Standard for Project Management, 7th Edition* shares "there is a process for the adaption of plans throughout the project based on emerging and changing needs or conditions,"

I took a look at my initial plan and the progress:

1 Quit current job   √
2 Write a book
3 Find a new job   √
4 Publish a book

The planned order didn't align with the actual order of steps. After a few late-night breakdowns, I realized my initial timeline was simply an artificial, self-imposed date. I determined that for my own sanity and to maintain the quality of the end product, I had to adjust my initial timeline. I adjusted from "by end of year" to "whenever I can finish a quality product that I can be proud of releasing to the world."

The *PMBOK Guide and The Standard for Project Management, 7th Edition* states: "being vigilant for indications of complexity allows project teams to adapt their approaches and plans to navigate potential disruption to effective project delivery." I had just begun to navigate the complexity of the book publishing process.

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Throughout the rest of the year, I would continue to collaborate with my writing coach, until finally, we both felt the book was ready to go to the publishing team. I forwarded it on to them and began the next phase of this project.

The publishing team began parallel paths of work: copy editing (grammar, spelling, spaces, punctuation, etc.) and cover design. It was a similar back-and-forth arrangement that I had with my writing coach: they would make suggestions and I would have to review and approve or push back with alternative options. We had meetings about once a month to stay on track and dig deeper into some topics. I had also taken a bit of a parallel path and given the most current version to three people to read: my husband, my boss and one of my best friends. I wanted to consider their perspective and incorporate their feedback, as appropriate. Among all the people now reading and providing input, there were so many decisions that needed to be made.

As the *PMBOK Guide and The Standard for Project Management, 7th Edition* says: "The goal is to make decisions quickly…some decisions may be made in a different direction than some people prefer…in the end, the deciding authority makes a decision based on the presented analysis." I definitely had to make several decisions that not everyone agreed with along the way, but I was trying to stay true to myself and my vision.

At some point, I realized I needed to find a website developer, have some updated professional photographs taken, create an LLC, and perhaps engage a public relations firm to help with the release. I continued to navigate the uncertainty and ambiguity associated with this project.

At initiation, I thought my husband was the only stakeholder I had, as he would clearly feel the impact of any lost wages, new project expenses and any related success or failure. However, as time passed, I soon began to realize, I had many stakeholders who comprised my project team including:

- Publishing company
- Writing coach
- Web developer
- Photographer
- The firm where I was now employed
- "Early readers" (a friend, my husband and my boss)

And, of course, the "end reader" or consumer of my final product would be the ultimate stakeholder and customer that I wanted to ensure I provided a quality result that they would enjoy. The *PMBOK Guide and The Standard for Project Management, 7th Edition* states that "defining and sharing a clear vision at the start of the project can enable good

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relationships and alignment throughout the project." I believed that I had defined and shared a clear vision and continued to put in the effort to see this project (dream) realized.

We were now into the next year, 2022, and I had been working on the project for almost a full year. As the _PMBOK Guide and The Standard for Project Management, 7th Edition_ says: "unexpected changes and circumstances in a project system can also present opportunities." This was certainly true in the regard that I had attended an author meet and greet in Dallas a few months earlier and had become fast friends with the author, Michael Clinton. Michael was a past President at Hearst Publishing and had recently released the book, ROAR. We had an aligned mindset and similar interests and so I asked him to write the foreword of the book. Happily, he agreed and by the end of summer I forwarded his contribution to the publishing team. I felt like the book was now 99% complete.

Moving into Monitoring and Controlling to #manifesttheuniverse

We were getting close to release, and I was finishing up the main phase of execution, I took some time to assess the status and tried to better determine a release date.

I reviewed my initial milestones and the progress:

1   Quit current job   √
2   Write a book   √
3   Find a new job   √
4   Publish a book

I reflected on how adaptability and resiliency had played such a critical role throughout. The _PMBOK Guide and The Standard for Project Management, 7th Edition_ summed up some of the critical things I had done for more than a year now:

- "continuous learning and improvement"
- "regular inspection and adaption"
- "ability to leverage new ways of thinking and working"

It was gratifying to know how far I had come and how tailoring my efforts throughout with "mindful selection and adjustment of multiple project factors" realizing "there is no single approach that can be applied to all projects all of the time" as the _PMBOK Guide and The Standard for Project Management, 7th Edition_ says, was certainly true.

In partnership with my publishing team, we determined the release date would be October 8, 2022. I decided that I needed to add something else to this plan—a book launch party. So, I began working on a mini-project within this main project and I began

- Identifying a location

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- Determining invitees
- Selecting an invitation
- Choosing food and beverages
- Booking a photo booth
- Ordering decorations and flowers

This was getting real! The publishing team sent me the last invoice, I had my final images of my photo shoot, my website was live, I had hired and fired a public relations company, my launch party was planned, and the launch date was almost here.

I was at a leadership retreat in California the weekend the book was released. I was sitting on the beach the moment the book went live on Amazon. I posted the links and the pre-designed marketing materials on social media, and then was overwhelmed with emotion. I had done it!

Closing the Project and Achieving my Dream

A few weeks later, after the launch party was over, I sat down to review the delivery performance and reflect on all that had occurred over the past 18 months. As part of the Delivery Performance Domain of the *PMBOK Guide and The Standard for Project Management, 7th Edition* summarizes:

- "projects realize the outcomes they were initiated to deliver"   √
- "project benefits are realized in the time frame in which they were planned"   X
- "stakeholders accept and are satisfied with project deliverables"   √

I reflected on what the *PMBOK Guide and The Standard for Project Management, 7th Edition* says about effective metrics: "what is measured…depend on the project objectives, the intended outcomes, and the environment in which the project takes place."

I reviewed the milestones:

1 Quit current job   √
2 Write a book   √
3 Find a new job   √
4 Publish a book   √
5 Host a launch party √

Although I did not complete these milestones in the initial timeframe I had hoped, I thought about my ultimate personal measurement of success:

- Book released
- Speaking events lined up

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- Books sold

All of these things were happening! I closed out this project and achieved my personal dream of writing a book.

Final Thoughts

I feel very strongly that being intentional about your dreams and creating a plan to overcome the obstacles in your way is a requirement for success. As stated in my book, *Unicorn Leadership*, "to be a Unicorn Leader requires a clear understanding of where you are going and being able to articulate how you are going to get there." I have developed a 15-step plan to Map Your Journey:

- Determine your values.
- Determine your strengths.
- State your "Big Hairy Audacious Goal" (Collins and Porras, 1994).
- Determine who is the person you admire in the area/industry you are pursuing.
- List your skills and credentials you currently possess.
- Determine the skills and credentials you must acquire.
- List the contacts you have that could help with advice, coaching or mentorship.
- Brainstorm networking ideas that could help you connect with others in this area of interest.
- Think about self-care areas you need to address to help ensure you get where you want to go (overall health, sleep, eating habits).
- State your timeline.
- List the determined actions you will take in the next 30, 90 and 180 days.
- Think about a quote that inspires you.
- Reflect on the feelings you will experience when your "Big Hairy Audacious Goal" is accomplished.
- Think about the obstacles you will likely encounter.
- Visualize your plan to overcome the obstacles, the haters, and everything in between.
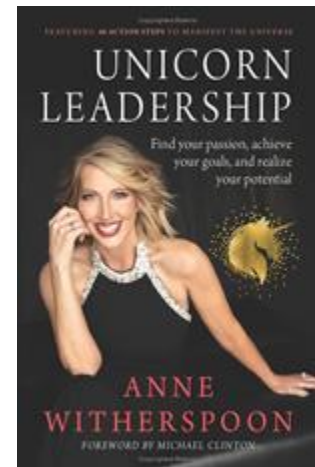
I believe anyone can begin to magically unlock the power of the universe with intentional actions…and project management methodology.

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Anne Witherspoon, PMP is the Chief Operations Officer and Chief Experience Officer at Messick Peacock & Associates. Anne has an MBA in International Business and a BBA in General Business. She has multiple professional certifications including Certified Change Management Professional, Certified Customer Experience Professional, Project Management Professional (PMP), Certified Treasury Professional and Accredited ACH Professional. She currently serves on the Board of Directors of the Texas Business Hall of Fame and is an active volunteer with National Charity League. Her hobbies include reading, running, writing, and traveling with her family.