

THE FIELD GUIDE · ESSENTIALS

The first 90 days, run by method.

The practitioner's fast-start operating system for new and accidental project managers — what to do, in what order, with the templates already built.

30 / 60 / 90

day roadmap

8 templates

Day-One Toolkit

Sourced

every claim

EDITION

PMBOK® 8th-Edition concepts

FORMAT

PDF · DOCX · Toolkit

HOW TO USE THIS GUIDE

Built for the first 90 days — and for reading under load.

This guide is designed to be used, not just read. Every chapter is one job, broken into single ideas, with a filled example and a blank template you can copy into the bundled Day-One Toolkit. It is written in plain language and laid out for low cognitive load: short sections, clear callouts, and a sources line wherever a fact is claimed.

● Time to read

How long the chapter takes.

◆ Key idea / Field note

The one thing to remember.

▲ Common failure

The mistake to avoid.

■ Filled example / template

Copy it straight into the Toolkit.

Aligned to PMBOK® 8th-Edition concepts. Standards are cited as authority and never reproduced. See Sources & Citations.

Every claim is sourced and tiered. A verified primary · B secondary, confirm · C original synthesis. Statistics carry their real year.

Version & updates. v1.0 · 2026-06-08. Free updates through the 8th-Edition cycle.

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THREE RULES WE BUILD BY

01

Show your sources. Every claim maps to a real, year-labelled citation.

02

One idea per section. Clear hierarchy, low cognitive load, nothing buried.

03

Earn every superlative — or cut it. Built to survive a PMP-certified read.

CONTENTS

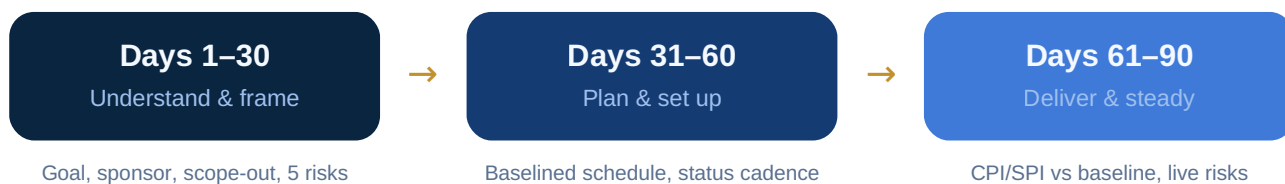
Eight chapters, in order of use.

01	Before Day 1	ORIENTATION
	What a project is; predictive vs. agile vs. hybrid; your mindset.	
02	The First Week	LANDING
	The charter, the sponsor, ten questions, stakeholder mapping.	
03	The 30 / 60 / 90 Roadmap	RHYTHM
	Milestones and 'what good looks like' at each gate.	
04	Set Up the Project	FOUNDATIONS
	Charter, scope/WBS, schedule, RAID, comms — with examples.	
05	Run the Project	CONTROL
	Status cadence, EVM-lite (CPI/SPI/EAC), change control, risk.	
06	Manage People	PEOPLE
	Managing up, delegation, saying no, escalation scripts.	
07	The Hard Lessons	WISDOM
	The twelve mistakes new PMs make, and how to avoid them.	
08	Close & Carry Forward	CLOSURE
	Closeout checklist, lessons learned, your next steps.	
A	Appendices	REFERENCE
	Glossary • Sources & Citations • Template Index • PMBOK® 8th crosswalk.	

THE 90-DAY MAP AT A GLANCE

From handed-the-project to in-control.

Ninety days is enough time to either establish control or lose it. This is the whole arc on one page; each phase has a single test you can answer yes or no.



Days 1–30

Understand & frame

Listen, map stakeholders, choose the approach, name the top risks. Test: can you state goal, sponsor, scope-out, approach, and five risks?

Days 31–60

Plan & set up

Charter, scope/WBS, baselined schedule, RAID, status cadence. Test: is a baselined schedule live and status going out on rhythm?

Days 61–90

Deliver & steady

Deliver against baseline, report CPI/SPI, control change, review risk. Test: can you show CPI/SPI vs. baseline and a live risk register?

HOW TO READ IT

Each phase ends with a yes/no test. If you cannot answer yes, that phase is not done — no matter how busy the calendar looks. Progress is measured against the test, not the effort.

WHY 90 DAYS

It is the window in which a new PM either earns the room's trust or loses it. Chapter 3 turns each gate into concrete milestones and a written standard for “what good looks like.”

Day 90 is not “done” for most projects — it is the point at which you can demonstrate control. (Chapter 3.)

01

ORIENTATION

Before Day 1

I've just been handed projects. Before anything else, what do I actually need to understand?

8 min read • Chapter 1 of 8

A project is a temporary effort to create something that did not exist before — a product, a service, a result — with a defined beginning and end. That word temporary is the whole job. You are not running a department; you are bringing something into being and then handing it over. Everything in this guide follows from that.

IN THIS CHAPTER

SECTION 1 Three ways projects are run

SECTION 2 Your operating mindset

◆ THE INSTRUMENT LINE

Every approach has an instrument.

When you outgrow doing this by hand, PM Vault builds one offline instrument per approach — each runs the full method on your own machine, with a source behind every number.

Foresight — predictive control: schedule, EVM & forecasting.

Cadence — adaptive delivery: flow, throughput & forecasting.

Converge — hybrid: reads both worlds and reconciles them.

See the line → pmvault.org

SECTION 1

Three ways projects are run

FIGURE 3

SAMPLE / DEMO

Method matters: success by approach



Source: Standish Group, CHAOS 2020. Most real projects are hybrid — the lesson is to match the approach to the work.

B • DERIVED

Before you choose a single template, understand the shape of the work. Modern practice recognises three broad approaches, and most real projects are a blend.

Predictive (“waterfall”) plans the scope up front and delivers against that plan. It suits work where the requirements are well understood and change is expensive — construction, regulated rollouts, hardware. Adaptive (agile) delivers in short increments, inspecting and adapting as it learns; it suits work where the requirements will genuinely change as you build. Hybrid uses both — a predictive backbone for the parts you can foresee, adaptive loops for the parts you cannot. The current edition of the profession’s leading guidance is explicitly principle- and outcome-based rather than prescribing one method, which is the standards world catching up to what practitioners already do.

■ THE ONLY WRONG CHOICE IS CHOOSING WITHOUT THINKING

New project managers default to whatever their organisation last used. Ask instead: how much is genuinely unknown, and how costly is change once we start? High unknown plus cheap change → lean adaptive. Low unknown plus expensive change → lean predictive. Most of the time you are somewhere in between, and naming where is half the battle.

SECTION 2

Your operating mindset

The technical craft of project management is learnable in weeks. The mindset takes longer, so start now.

You are not the expert in the room — and you don’t need to be. A reliable way to lose a technical team in the first fortnight is to pretend you understand their work better than they do. Your job is not to have the answers; it is to make sure the right people are asked the right questions at the right time, and that the trade-offs are owned out loud. Lean on your subject-matter experts, and own the decision.

◆ FIELD NOTE

Borrow expertise, own the trade-off

When an engineer says ‘option A is faster but riskier,’ your job is not to second-guess the engineering — it is to surface the risk to the sponsor and record the decision. The expert owns the ‘how’; you own the ‘so what.’

Don’t skip the boring beginning to look fast. Under pressure, the instinct is to jump straight to execution — it feels productive. It is the most reliably expensive mistake a new project manager makes. The initiating and planning you skip in week one becomes the rework you pay for in month three. Charter first, then kickoff.

▲ COMMON FAILURE

“We’ll sort the plan out as we go”

Sometimes true for genuinely adaptive work — but adaptive is a deliberate method with its own discipline, not an excuse to skip thinking. If you cannot say who the sponsor is, what ‘done’ means, and who decides on change, you are not being agile. You are being unplanned.

■ FILLED EXAMPLE – APPROACH SELECTION (WORKED)

FACTOR	THIS PROJECT	SIGNAL
Requirements clarity	Mostly known	→ predictive backbone
Expected change	Moderate, in the UI	→ adaptive loop for UI
Cost of late change	High (integrations)	→ lock integrations early
Verdict	Hybrid	Predictive plan + 2-week UI iterations

□ BLANK TEMPLATE – APPROACH SELECTION

FACTOR	THIS PROJECT	SIGNAL / DECISION
--------	--------------	-------------------

► BEFORE DAY 1

- ☐ Write one sentence: what this project will create, and by when.

- ☐ Name the sponsor — the single person accountable for the business outcome.

- ☐ Decide your approach (predictive / adaptive / hybrid) and write down why.

- ☐ List the three things you most need to learn in week one.

- ☐ Resist starting execution until the charter exists (Chapter 4).

● WHAT GOOD LOOKS LIKE

You can name the sponsor, the goal, and the approach — and you've scheduled time to plan before you build.

▲ COMMON FAILURE

You're already assigning tasks on day one because it feels like progress, with no charter and no named sponsor.

SOURCES

- Predictive / adaptive / hybrid life cycles and the principle-based structure of current guidance — PMBOK® Guide 8th-Edition concepts, cited as authority. **A • PRIMARY**
- Agile concepts referenced via the 2020 Scrum Guide as authority (original synthesis, no adapted text reproduced). **A • PRIMARY**
- 'Skipping the boring beginning' and 'faking technical authority' as classic new-PM failures — PMI practitioner guidance. **A • PRIMARY**

02
LANDING

The First Week

I'm in the room now. Who do I talk to, what do I ask, and how do I not look lost?

10 min read • Chapter 2 of 8

Your first week has one purpose: to replace assumptions with facts. You are mapping the terrain — who holds the goal, who holds the money, who can quietly sink you — before you commit to a single date. Move deliberately. The week you spend listening buys you the months you won't spend recovering.

IN THIS CHAPTER

SECTION 1 Find the charter, find the sponsor

SECTION 2 The ten questions to ask

SECTION 3 Map stakeholders before they map you

SECTION 1

Find the charter, find the sponsor

Two artefacts anchor everything. The charter is the document that authorises the project and names its objectives (you will write or complete one in Chapter 4). The sponsor is the person accountable for the business outcome — your single most important relationship. If no charter exists, that is your first finding, not a reason to wait. If the sponsor is unclear, finding out who it really is becomes your week-one priority.

♦ FIELD NOTE

If there is no charter, that is finding #1

Ask three people where the project was approved and what it was meant to achieve. If you get three different answers you haven't found a charter — you've found the reason to write one (Chapter 4). Draft a one-page version and circulate it; alignment appears surprisingly fast.

► THE WEEK-ONE CHARTER HUNT

- ☐ Ask the sponsor for the approved charter or business case.
- ☐ If none exists, capture the goal in one sentence and circulate it.
- ☐ Confirm the single accountable sponsor by name.
- ☐ Note who signs off on changes to scope, time, or budget.

SECTION 2

The ten questions to ask

Ask these in your first conversations with the sponsor and key stakeholders. They are deliberately plain. Plain questions, asked early and without ego, are how senior project managers look competent — not by having answers nobody asked for.

■ FILLED EXAMPLE – THE TEN QUESTIONS

#	ASK	WHY IT MATTERS
1	What does success look like, in measurable terms?	Turns 'make it better' into something you can verify.
2	Who is the sponsor, and who decides on change?	Names your escalation path before you need it.
3	What is explicitly out of scope?	Out-of-scope is where creep begins.
4	What's the real deadline, and what's driving it?	Distinguishes a hard date from a hopeful one.
5	What's the budget, and who owns it?	You cannot trade cost you can't see.
6	Who are the people I must keep aligned?	Builds your stakeholder map.
7	What's gone wrong on past projects here?	Local failure patterns repeat.
8	What constraints are non-negotiable?	Regulation, tech, dates you cannot move.
9	Which experts do I rely on, and how busy are they?	Surfaces resource risk early.
10	What does the sponsor want to hear, and how often?	Designs your reporting before week two.

◆ FIELD NOTE

Take notes you can quote back

Write answers in the stakeholder's own words and read the key ones back: 'So success is the portal live by 30 September with under a 2% error rate — have I got that right?' Confirmation in week one prevents a dispute in month three.

SECTION 3

Map stakeholders before they map you

A stakeholder is anyone who can affect, or is affected by, your project. The quiet ones with influence are the ones who sink projects late, so find them early. A simple power / interest grid sorts them into four strategies: manage closely (high power, high interest), keep satisfied (high power, low interest), keep informed (low power, high interest), and monitor (low power, low interest).

■ FILLED EXAMPLE — STAKEHOLDER MAP (WORKED)

STAKEHOLDER	POWER	INTEREST	STRATEGY
Sponsor (VP Ops)	High	High	Manage closely — weekly 1:1
Finance director	High	Low	Keep satisfied — monthly summary
End-user lead	Low	High	Keep informed — demo each increment
Adjacent team PM	Low	Low	Monitor — flag on dependencies

□ BLANK TEMPLATE — STAKEHOLDER REGISTER

STAKEHOLDER	POWER	INTEREST	ENGAGEMENT STRATEGY

► FIRST WEEK

- ☐ Locate or request the charter; if none exists, log it as finding #1.
- ☐ Confirm the sponsor and the change decision-maker by name.
- ☐ Run the ten questions with the sponsor and two key stakeholders.
- ☐ Draft a power/interest map and a stakeholder register.
- ☐ Agree the sponsor's reporting cadence and format.

● WHAT GOOD LOOKS LIKE

By Friday you can name every high-power stakeholder, what success means, and what's out of scope — in writing.

▲ COMMON FAILURE

You spent the week 'getting up to speed' in your inbox and still can't say who signs off on change.

SOURCES

- Stakeholder identification and power/interest analysis as early, recurring practice; weak engagement and misalignment are repeatedly cited failure drivers — PMI concept. **A · PRIMARY**
- Power/interest grid — established public stakeholder-analysis practice (Mendelow). **A · PRIMARY**

03
RHYTHM

The 30 / 60 / 90 Roadmap

What should actually be true at day 30, day 60, and day 90? Give me the milestones.

8 min read • Chapter 3 of 8

Ninety days is enough time to either establish control or lose it. This roadmap gives you concrete milestones and a plain test of ‘what good looks like’ at each gate, so you are measuring progress against a standard instead of against your nerves.

IN THIS CHAPTER

SECTION 1 Days 1–30 — Understand and frame

SECTION 2 Days 31–60 — Plan and set up

SECTION 3 Days 61–90 — Deliver and steady

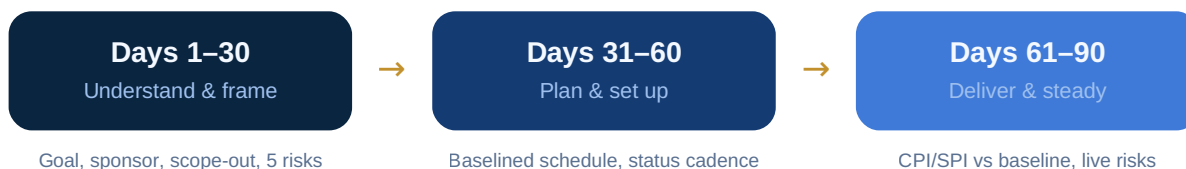
SECTION 1

Days 1–30 — Understand and frame

FIGURE 9

SAMPLE / DEMO

The first 90 days, at a glance



A visual summary of Chapter 3. Original synthesis. C • ESTIMATE

Listen, map, and frame. By day 30 the project should be defined, even if not yet fully planned: charter drafted or confirmed, sponsor relationship established, stakeholders mapped, approach chosen, and the top risks named. You

are not behind if you have not started building — you are ahead if you have stopped yourself from building the wrong thing.

► DAYS 1–30

- ☐ Run the ten questions with the sponsor and two key stakeholders.
- ☐ Locate or draft the charter and circulate it for sign-off.
- ☐ Map stakeholders (power/interest) and open the RAID log.
- ☐ Choose your approach — predictive / adaptive / hybrid — and write down why.
- ☐ Name the top five risks.

◆ FIELD NOTE

Frame before you build

By day 30 the project should be defined, not necessarily started. The week you spend understanding is the months you won't spend reworking.

SECTION 2

Days 31–60 — Plan and set up

Convert understanding into a plan others can act on: scope and a work breakdown, a realistic schedule with a baseline, a budget, a populated RAID log, and a working status cadence. By day 60 the machine should be running — status reports going out, risks being reviewed, change being controlled.

► DAYS 31–60

- ☐ Write scope in/out and decompose into a WBS.
- ☐ Build the schedule with owners and set a protected baseline.
- ☐ Draft the budget and open the cost / EVM sheet.
- ☐ Stand up the status cadence and lock the one-page format.
- ☐ Run the first cadence risk review.

◆ FIELD NOTE

Day 60 is when the machine should run itself

By the two-month mark, status goes out on a fixed day, risks are reviewed every cycle, and change flows through a logged process. If those rhythms aren't live yet, prioritise them over new scope.

SECTION 3

Days 61–90 — Deliver and steady

Now you are demonstrating control. By day 90 you should be delivering against the baseline with evidence (Chapter 5's CPI/SPI), running a steady reporting rhythm, managing change through a logged process, and capturing lessons as you go rather than saving them for the end.

■ FILLED EXAMPLE — 30/60/90 — WHAT GOOD LOOKS LIKE

GATE	MILESTONE	THE TEST
Day 30	Project framed	Can you state goal, sponsor, scope-out, approach, top 5 risks?
Day 60	Plan operational	Is a baselined schedule live and is status going out on cadence?
Day 90	Delivering with control	Can you show CPI/SPI vs. baseline and a current risk register?

□ BLANK TEMPLATE — YOUR 30/60/90 PLAN

GATE	TARGET MILESTONE	OWNER	STATUS

▲ COMMON FAILURE

Treating 90 days as a countdown to 'done'

For most projects, day 90 is not delivery — it is the point where you should have demonstrable control. Confusing the two makes you rush setup to show false progress. Steady control beats theatrical speed.

► THE ROADMAP

- ☐ Set your three gate dates (30/60/90) on a calendar now.
- ☐ Write the one-line 'what good looks like' test for each gate.
- ☐ Schedule a 30-minute self-review at each gate.
- ☐ Share the roadmap with your sponsor so expectations match.

● WHAT GOOD LOOKS LIKE

At each gate you check yourself against a written standard and adjust early.

▲ COMMON FAILURE

You judge progress by how busy you feel, and discover at day 80 that setup was never finished.

SOURCES

- Phase/gate framing and milestone health as governance practice — PMBOK® 8th-Edition concepts and ISO 21502:2020, cited as authority. **A · PRIMARY**

04

FOUNDATIONS

Set Up the Project

Show me the core documents — charter, scope, schedule, RAID, comms — with examples I can copy.

14 min read • Chapter 4 of 8

Setup is where projects are quietly won or lost. Five artefacts carry the load: the charter, the scope and work breakdown, the schedule, the RAID log, and the communications plan. Each appears here with a filled example and a blank you can lift straight into the Day-One Toolkit.

IN THIS CHAPTER

SECTION 1 The project charter

SECTION 2 Scope and the work breakdown

SECTION 3 The schedule

SECTION 4 The RAID log

SECTION 5 The communications plan

SECTION 1

The project charter

The charter authorises the project and records, on one page, what you are doing and why. It names the objectives in measurable terms, the scope boundaries, the sponsor, and the success criteria. It is the document you point to when someone asks ‘wait, why are we doing this?’ in month two — and someone always does.

■ NAIL REQUIREMENTS, OR PAY FOR THEM LATER

Inaccurate requirements are among the most common reasons unsuccessful projects miss their goals — PMI’s 2014 research put the figure around 47% of such projects. Write objectives you can measure and have the sponsor sign them off. Vague objectives are deferred arguments.

■ FILLED EXAMPLE – PROJECT CHARTER (WORKED, CONDENSED)

FIELD	ENTRY
Purpose	Replace the manual intake process with a self-service portal.
Objective (measurable)	Portal live by 2026-09-30; <2% submission error rate; 30% fewer support tickets.
In scope	Public form, validation, case routing, admin dashboard.
Out of scope	Payments, mobile app, legacy data migration.
Sponsor	VP Operations (accountable for outcome).
Success criteria	Objective met + sign-off from Ops and Support leads.

□ BLANK TEMPLATE – PROJECT CHARTER

FIELD	ENTRY

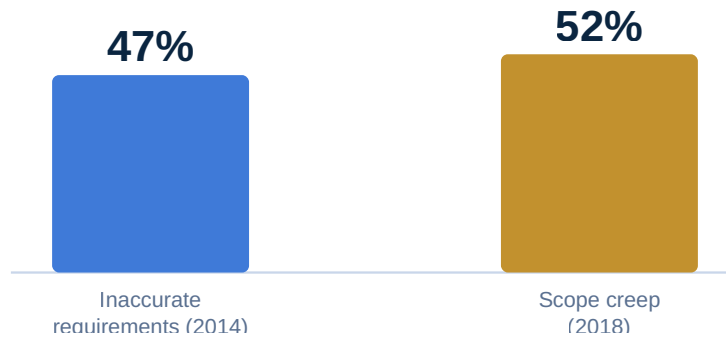
SECTION 2

Scope and the work breakdown

FIGURE 5

SAMPLE / DEMO

Where projects go wrong early



Sources: inaccurate requirements in unsuccessful projects — PMI, 2014; scope creep — PMI Pulse of the Profession, 2018.

A • PRIMARY

Scope is what you will and will not deliver, stated clearly enough to defend. A work breakdown structure (WBS) decomposes the deliverables into manageable pieces — not a task list, but a map of the outputs. Get the scope in writing, because scope creep is the quiet killer: PMI's 2018 Pulse found 52% of projects experienced scope creep, up from 43% five years earlier.

■ FILLED EXAMPLE — WORK BREAKDOWN STRUCTURE (WORKED)

WBS #	DELIVERABLE / WORK PACKAGE	OWNER	EST. DAYS
1.0	Customer Portal	PM	—
1.1	Public submission form	Tech lead	8
1.2	Validation & rules engine	Tech lead	5
1.3	Case routing	Tech lead	6
1.4	Admin dashboard	Tech lead	7
2.0	Testing	Support lead	—
2.1	UAT plan & scripts	Support lead	3
2.2	UAT execution	Support lead	10
3.0	Go-live	PM	—

SECTION 3

The schedule

A schedule turns the WBS into time: tasks, dependencies, owners, and a baseline — the agreed plan you will measure against. You do not need elaborate software to start; you need honest durations, named owners, and a baseline you protect. Keep the baseline clean so that when reality diverges you can see by how much (Chapter 5).

■ FILLED EXAMPLE – SCHEDULE (WORKED, CONDENSED)

TASK	OWNER	START	END	% COMP
Design	Tech lead	2026-07-01	2026-07-19	60%
Build	Tech lead	2026-07-13	2026-08-23	20%
UAT	Support lead	2026-08-24	2026-09-13	0%

◆ FIELD NOTE

Protect the baseline

Save the agreed plan as a baseline and never edit it silently. When reality diverges, the gap between baseline and actual is your earliest warning (Chapter 5). A plan you quietly rewrite each week cannot warn you of anything.

SECTION 4

The RAID log

RAID stands for Risks, Assumptions, Issues, and Decisions — the four things that, left uncaptured, come back to bite you. One living log, reviewed on cadence, keeps them visible and owned.

■ FILLED EXAMPLE – RAID LOG (WORKED)

TYPE	ENTRY	OWNER	ACTION
Risk	Key API may not be ready by Aug	Tech lead	Confirm date by 06-20; plan B stub
Assumption	Support team available for UAT	PM	Validate with Support lead
Issue	Test environment unstable	DevOps	Fix by 06-15; blocking QA
Decision	Defer payments to phase 2	Sponsor	Logged 06-08; scope updated

□ BLANK TEMPLATE – RAID LOG

Type	Description	Owner	Action / Due

SECTION 5

The communications plan

Decide, in advance, who hears what and how often. A one-line plan per audience prevents both the flood and the silence (Chapter 5 and 6 build on this).

► PROJECT SETUP

- ☐ Complete the charter and get the sponsor's written sign-off.
- ☐ State scope in and out; decompose deliverables into a WBS.
- ☐ Build a schedule with owners and set a baseline.
- ☐ Open a RAID log and seed it with your known risks.
- ☐ Write a one-line comms plan per audience.

- WHAT GOOD LOOKS LIKE

Every artefact exists, is signed where it matters, and lives in one place the team can find.

▲ COMMON FAILURE

Scope is 'understood' but unwritten, the schedule has no baseline, and risks live in your head.

SOURCES

- ~47% of unsuccessful projects miss goals on inaccurate requirements — PMI, 2014. [A · PRIMARY](#)
- 52% of projects experienced scope creep — PMI Pulse of the Profession, 2018 (up from 43% five years prior). [A · PRIMARY](#)
- Charter, WBS, baseline, and RAID as setup practice — PMBOK® 8th-Edition concepts, cited as authority. [A · PRIMARY](#)

05
CONTROL

Run the Project

It's live. How do I keep it on track — status, the numbers, change, and risk — without drowning?

16 min read • Chapter 5 of 8

Running a project is the disciplined repetition of four things: report on a rhythm, measure with evidence, control change, and review risk. Do them on cadence and the project tells you when it is drifting, early enough to act. Do them on impulse and you find out from someone else, too late.

IN THIS CHAPTER

SECTION 1 Status on a cadence, not on impulse

SECTION 2 Measure with evidence — EVM-lite

SECTION 3 Control change — nothing moves without a logged request

SECTION 4 Run risk as a living register

SECTION 5 Recover slippage with method, not heroics

◆ WHAT FORESIGHT AUTOMATES

This chapter, run for you — offline.

CPI, SPI and EAC by hand keep you honest; at portfolio scale they get heavy. **PM Vault Foresight** computes earned value and earned schedule, runs a 10,000-trial Monte-Carlo forecast over your real schedule, and flags risk — entirely on your machine, with the figures behind every call.

Fly the real engine → pmvault.org

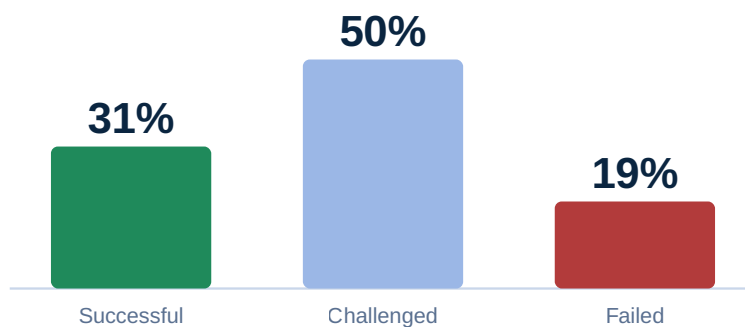
SECTION 1

Status on a cadence, not on impulse

FIGURE 1

SAMPLE / DEMO

Most projects still don't fully succeed



Source: Standish Group, CHAOS research (most recent; methodology widely cited and debated). [B · DERIVED](#)

Both failure modes are documented: flooding stakeholders with noise, and going silent until a crisis. Poor communication is itself a project risk. The cure is rhythm — a fixed reporting interval and a one-page format that says the same things every time: progress, the two performance numbers, top risks, decisions needed.

♦ FIELD NOTE

One page, every time

A status report that changes shape every week trains people to stop reading it. Lock the format: RAG status, % complete, CPI & SPI, top three risks, and 'decisions I need from you.' Predictability is a feature.

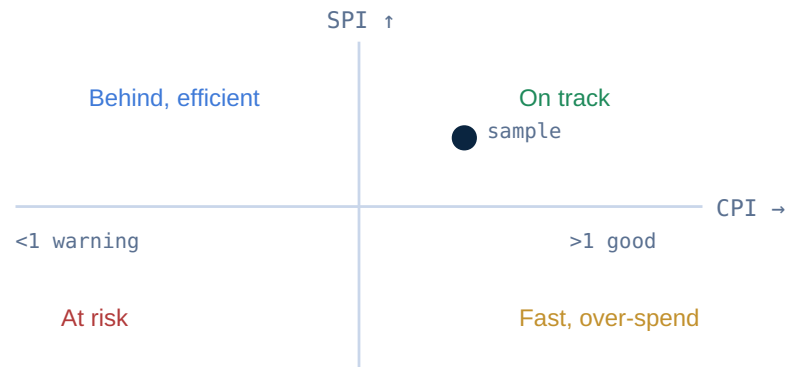
SECTION 2

Measure with evidence — EVM-lite

FIGURE 7

SAMPLE / DEMO

Reading CPI and SPI together



Conceptual; sample point illustrative. EVM math per standard public practice (PMI/AACE). [A C • ESTIMATE]

'On track' is a feeling. Earned value gives you two numbers that settle the argument, using three inputs you already have. Planned Value (PV) is the budgeted cost of work you said you'd finish by now; Earned Value (EV) is the budgeted cost of work you actually finished; Actual Cost (AC) is what that finished work cost.

```
// Cost Performance Index – value for money?
CPI = EV / AC   > 1 good • < 1 over budget
// Schedule Performance Index – keeping pace?
SPI = EV / PV   > 1 ahead • < 1 behind
// Forecast at completion
EAC = BAC / CPI   BAC = total budget
```

Read CPI and SPI together. A CPI of 0.9 is a ten-percent efficiency leak; an SPI of 0.8 means four-fifths of the promised pace. Neither cares how busy the team feels — which is exactly why they belong in front of your sponsor.

■ FILLED EXAMPLE — EVM-LITE SNAPSHOT (WEEK 6 OF 12; BAC \$120,000)

MEASURE	VALUE	PLAIN READING
CPI = 48,000 / 54,000	0.89	11% cost-efficiency leak
SPI = 48,000 / 60,000	0.80	20% behind the promised pace
EAC = 120,000 / 0.89	≈ \$134,800	Forecast overrun ≈ \$14,800

▲ COMMON FAILURE

Reporting % complete on its own

‘We’re 80% done’ is the most expensive sentence in project management. Percent-complete with no cost or schedule baseline hides overruns until they are irreversible. Pair every progress claim with CPI and SPI.

SECTION 3

Control change — nothing moves without a logged request

FIGURE 2

SAMPLE / DEMO

Big projects fail bigger



Source: McKinsey & University of Oxford (BT Centre for Major Programme Management), 2012. A · PRIMARY

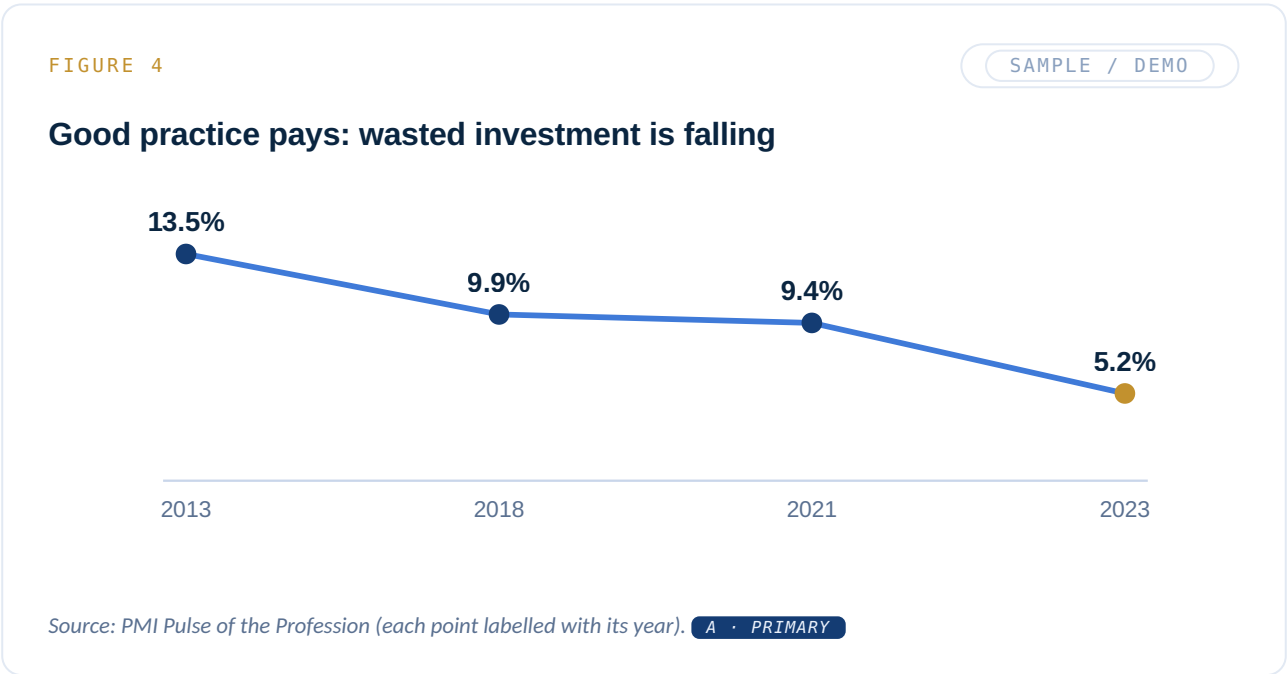
Scope creep is rarely one big decision; it is fifty small ‘quick favours.’ The defence is a single rule: no change to scope, schedule, or budget without a logged change request and an impact assessment. The change log is not bureaucracy — it is the evidence that protects you and the team when someone asks why the date moved.

■ FILLED EXAMPLE – CHANGE REQUEST (WORKED)

FIELD	ENTRY
Change	Add SSO login
Requested by	Security lead, 06-18
Impact	+2 weeks, +\$8k, schedule re-baselined
Decision	Approved by sponsor; baseline updated

SECTION 4

Run risk as a living register



A risk register is not a setup artefact you file away; it is reviewed every status cycle and at every risk event, with responses and triggers planned before the risk lands. Each risk gets an owner, a probability and impact, a response, and a trigger that tells you when to act.

FILLED EXAMPLE – RISK REGISTER (WORKED)

RISK	P×I	RESPONSE	TRIGGER
API late	H×H	Build stub; escalate	No firm date by 06-20
Key SME leave	M×H	Cross-train backup	Leave request filed
Scope pressure	H×M	Enforce change log	2nd informal 'quick add'

SECTION 5

Recover slippage with method, not heroics

When you fall behind, panic re-planning makes it worse. Keep a clean baseline, identify the critical path, and build a named recovery schedule — re-sequencing, fast-tracking, or adding resource deliberately. Structured recovery claws back slippage; heroics burn the team and rarely hold.

▶ RUNNING THE PROJECT

- ☐ Set a fixed status cadence and lock the one-page format.
- ☐ Capture PV, EV, AC each cycle; report CPI and SPI.
- ☐ Route every change through a logged request with impact.
- ☐ Review the risk register every status cycle, not just at setup.
- ☐ Protect the baseline; if you recover, recover with a named plan.

● WHAT GOOD LOOKS LIKE

Your sponsor sees the same one-pager every cycle with two honest numbers, and change is always traceable.

▲ COMMON FAILURE

Updates are ad-hoc and rosy, scope drifts via 'quick favours,' and risks resurface as surprises.

SOURCES

- Earned-value formulae (CPI, SPI, EAC) — standard public PM mathematics, consistent with PMI/AACE practice and PMBOK® 8th-Edition cost concepts. **A · PRIMARY**
- Communication cadence; flooding and silence as documented mistakes; poor communication as a risk — PMI / APM. **A · PRIMARY**
- Living risk register reviewed on cadence with pre-planned responses/triggers — APM / PMI. **A · PRIMARY**
- 52% scope creep — PMI Pulse, 2018; structured recovery (critical path, re-baseline) — standard public practice. **A · PRIMARY**

06
PEOPLE

Manage People

How do I manage up, handle difficult stakeholders, say no, and escalate without burning bridges?

10 min read • Chapter 6 of 8

Projects are delivered through people you mostly don't manage. That is the real difficulty of the job and the real skill. The tools are simple; using them with steadiness under pressure is the craft.

IN THIS CHAPTER

SECTION 1 Your sponsor is your lifeline — manage up

SECTION 2 Stop hoarding the work — delegation is the job

SECTION 3 Communicate on a cadence

SECTION 4 Saying no, and escalating well

SECTION 1

Your sponsor is your lifeline — manage up

Inadequate sponsor and stakeholder involvement ranks among the most-cited causes of project failure. Treat the sponsor relationship as infrastructure: a standing check-in from week one, where you bring decisions rather than problems, and you are honest early. A sponsor who hears bad news late stops trusting the good news too.

◆ FIELD NOTE

Bring decisions, not just problems

Don't arrive with 'the API is late.' Arrive with 'the API is late; here are two options with cost and date impact; I recommend option B; I need your decision by Thursday.' You make the sponsor's job easy and your competence visible in the same sentence.

SECTION 2

Stop hoarding the work — delegation is the job

Over-shouldering is a documented new-PM failure. Your value is not in doing the most tasks; it is in making sure the right tasks are done by the right people. Delegate decisions, not just to-dos — give people the outcome and the constraints, and let them own the how. Research on management consistently links strong delegation to better organisational performance.

■ FILLED EXAMPLE — DELEGATE THE DECISION, NOT JUST THE TASK

INSTEAD OF...	DO THIS
'Send me the draft to review'	'You own the draft — ship it when it meets the Definition of Done'
'Ask me before changing anything'	'You decide within this budget and date; flag only the trade-offs'
'I'll handle the tricky bits'	'You own this end-to-end; I'll clear blockers'

◆ FIELD NOTE

Give outcomes and constraints, then step back

Tell the owner what good looks like and the limits — budget, date, quality bar — then let them choose the how. Check in on a cadence, not over their shoulder.

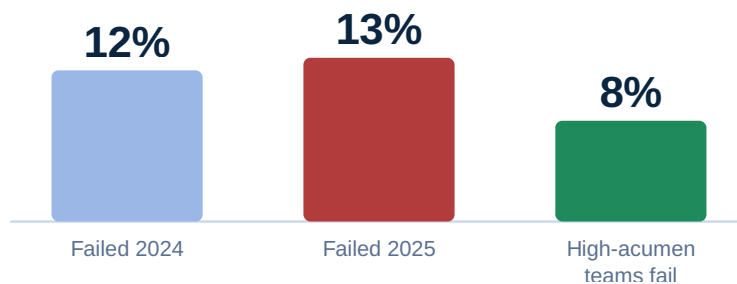
SECTION 3

Communicate on a cadence

FIGURE 6

SAMPLE / DEMO

Today's benchmark, and what moves it



Source: PMI Pulse of the Profession, 2025. **A • PRIMARY**

As in Chapter 5: rhythm beats impulse with people too. Difficult stakeholders are usually under-informed stakeholders. A predictable flow of honest information defuses most conflict before it starts.

► A COMMUNICATION CADENCE THAT HOLDS

- ☐ Set a fixed day and format for status; never vary it.
- ☐ Match frequency to each audience (comms plan, Chapter 4).
- ☐ Report the same lines every cycle: RAG, % complete, CPI/SPI, top risks, decisions.
- ☐ Make raising a blocker safe and normal, not a last resort.

SECTION 4

Saying no, and escalating well

'No' is a complete sentence, but 'not without a trade-off' is a better one. Tie every request back to the charter and the baseline: yes, we can add that — here is what moves. Escalation is not failure; escalating late is. Escalate with a recommendation, not just an alarm.

“ SCRIPT

Escalation script you can adapt

‘I want to flag a risk to the date. [Issue] means we’ll likely miss [milestone] by [amount]. I’ve looked at [options]. I recommend [option] because [reason]. To do that I need [decision/resource] from you by [date]. If we do nothing, the impact is [consequence].’

■ FILLED EXAMPLE – SAYING NO WITH A TRADE-OFF (WORKED)

REQUEST	YOUR RESPONSE
‘Can we also add reporting?’	‘Yes — that’s ~1 week and pushes go-live to 07-Oct. Shall I log the change for sign-off?’
‘Can we go live a week early?’	‘Possible if we drop the admin dashboard to phase 2. Want me to cost that trade?’

□ BLANK TEMPLATE – ESCALATION / DECISION LOG

ISSUE	OPTIONS	RECOMMENDATION	DECISION NEEDED BY

► MANAGING PEOPLE

- ☐ Schedule a standing sponsor check-in starting this week.
- ☐ Bring every problem with options and a recommendation.
- ☐ Delegate at least one decision (not just a task) this week.
- ☐ Reframe the next ‘no’ as a trade-off against the baseline.
- ☐ Pre-draft your escalation script so it’s ready when you need it.

● WHAT GOOD LOOKS LIKE

Your sponsor is never surprised, your team owns real decisions, and a 'no' always comes with a costed trade.

▲ COMMON FAILURE

You absorb every task yourself, surface bad news late, and say yes to avoid conflict — then miss the date.

SOURCES

- Inadequate sponsor/stakeholder involvement among top failure causes — PMI (cite specific edition). **A · PRIMARY**
- Over-shouldering as a rookie failure; delegation drives performance — use Gallup / LBS, not the unverifiable '25% HBR' claim. **B · DERIVED**
- Communication cadence and escalation discipline — PMI / APM. **A · PRIMARY**

07
WISDOM

The Hard Lessons

Give me the mistakes new PMs make — and how to avoid each one — in one place.

10 min read • Chapter 7 of 8

Twelve lessons that practitioners tend to learn the expensive way. Each is stated as a rule, with why it holds and where it lives in this guide. None is a personal anecdote; each is grounded in published practice and, where a number appears, labelled with its real year.

01 Don't skip the boring beginning to look fast.

Skipping initiating and planning is a classic rookie failure; the time saved up front is repaid as rework. (PMI.)

→ [Chapter 4](#)

02 Nail requirements or pay later.

~47% of unsuccessful projects miss goals on inaccurate requirements — PMI, 2014. Measurable objectives with sponsor sign-off.

→ [Chapter 4](#)

03 Define scope in writing — creep is the quiet killer.

52% of projects experienced scope creep — PMI Pulse 2018 (up from 43%). No change without a logged request and impact.

→ [Chapter 5](#)

04 Your sponsor is your lifeline — manage up.

Inadequate sponsor involvement ranks among PMI's top failure causes. Standing check-in; honest early.

→ [Chapter 6](#)

05 Map stakeholders before they map you.

Misalignment and weak engagement are repeatedly cited failure drivers. Power/interest map in week one.

→ [Chapter 2](#)

06 Communicate on a cadence, not on impulse.

Both flooding and silence are documented mistakes; poor communication is itself a risk. Fixed rhythm, one-page format.

→ [Chapter 5](#)

07 Stop hoarding the work — delegation is the job.

Over-shouldering is a documented failure; delegation drives performance (Gallup / LBS). Delegate decisions, not just tasks.

→ [Chapter 6](#)

08 You're not the expert — lean on SMEs.

Faking technical authority loses teams; rely on functional leads and own the trade-off. (PMI.)

→ [Chapters 1 & 6](#)

09 Run risk as a living register.

The register must be reviewed on cadence and at risk events, with responses and triggers pre-planned. (APM/PMI.)

→ [Chapter 5](#)

10 Measure with evidence, not optimism.

$CPI = EV/AC$, $SPI = EV/PV$; >1 good, <1 warning. The numbers take emotion out of decisions.

→ [Chapter 5](#)

11 Capture lessons continuously, not at the funeral.

Lessons are a lifecycle activity, not a closeout ritual; reuse them immediately. (APM.)

→ [Chapter 8](#)

12 Recover slippage with method, not heroics.

Clean baseline → critical path → named recovery schedule claws back slippage; panic re-planning doesn't.

→ [Chapter 5](#)

SOURCES

- Lessons synthesised from PMI and APM practitioner guidance; statistics year-labelled (PMI 2014, PMI Pulse 2018). The '25% delegation/HBR' figure is omitted as unverifiable; delegation evidence drawn from Gallup / LBS. A B • DERIVED

08
CLOSURE

Close & Carry Forward

It's ending. How do I close cleanly, capture what we learned, and grow from here?

6 min read • Chapter 8 of 8

A project that delivers but never closes properly leaves value on the table — unconfirmed benefits, unlearned lessons, a team that disperses without acknowledgement. Closing is a discipline, and it is also where your next project gets easier.

IN THIS CHAPTER

SECTION 1 The closeout checklist

SECTION 2 Lessons learned — continuously

SECTION 3 Carry forward — your PM career

SECTION 1

The closeout checklist

Close deliberately: confirm the deliverables meet the success criteria, get formal sponsor acceptance, hand over to operations, release the team and resources, and archive the project record so the next person can find it.

■ FILLED EXAMPLE — CLOSEOUT CHECKLIST (WORKED)

STEP	DONE WHEN...
Verify deliverables	Each success criterion is demonstrably met.
Sponsor acceptance	Written sign-off received.
Operational handover	Owner named; documentation transferred.
Release resources	Team and budget formally closed.
Archive	Charter, baseline, RAID, lessons stored and findable.

□ BLANK TEMPLATE — CLOSEOUT CHECKLIST

STEP	DONE WHEN...	OWNER

SECTION 2

Lessons learned — continuously

Don't wait for the post-mortem. Capture lessons at every gate with a ten-minute 'what did we learn' and reuse them immediately. A closeout retrospective then consolidates rather than discovers.

□ BLANK TEMPLATE — LESSONS LEARNED LOG

WHAT HAPPENED	WHY	WHAT WE'LL DO DIFFERENTLY

SECTION 3

Carry forward — your PM career

Each project is a deposit in your judgement. Keep a running record of the decisions you made and how they turned out; it is the fastest way to grow. As you take on larger work, the standards you have been citing here — PMBOK® 8th-Edition concepts, ISO 21500/21502, PRINCE2 7, the Scrum Guide — become worth studying in depth, and a credential such as the PMP may be worth pursuing. Note the timing: the PMP exam moves to 8th-Edition content on 2026-07-09 (verify against the official source before relying on the date).

► CLOSING AND CARRYING FORWARD

- ☐ Verify every success criterion and get written sponsor acceptance.
- ☐ Complete the operational handover with a named owner.
- ☐ Run a closeout retrospective and store the lessons where they'll be found.
- ☐ Archive the full project record (charter → baseline → RAID → lessons).
- ☐ Record your own decisions and outcomes for your next project.

● WHAT GOOD LOOKS LIKE

The project ends with sign-off, a clean handover, lessons captured, and a record the next PM can use.

▲ COMMON FAILURE

Delivery happens, the team scatters, and the lessons live only in people's memories until they leave.

SOURCES

- Lessons learned as a continuous lifecycle activity — APM. **A · PRIMARY**
- Closure, acceptance, and handover as governance practice — PMBOK® 8th-Edition concepts and ISO 21502:2020, cited as authority. **A · PRIMARY**
- PMP transition to 8th-Edition content on 2026-07-09 — PMI communications; re-verify before relying on the date. **B · DERIVED**

APPENDIX A

Glossary

Actual Cost (AC)

What the completed work actually cost to date.

Baseline

The approved plan (scope, schedule, cost) you measure performance against.

Charter

The document that authorises the project and records its objectives, scope, sponsor, and success criteria.

CPI

Cost Performance Index = EV / AC . Above 1 is good; below 1 means you are over budget.

Critical path

The longest chain of dependent tasks; it determines the earliest finish date.

EAC

Estimate at Completion = BAC / CPI . A forecast of total cost at current efficiency.

Earned Value (EV)

The budgeted cost of the work actually completed.

Hybrid

An approach blending predictive planning with adaptive (agile) delivery loops.

Milestone

A significant, dateable point in the schedule — usually a deliverable or decision.

Planned Value (PV)

The budgeted cost of work scheduled to be complete by now.

Power/interest grid

A stakeholder-analysis tool sorting people by influence and interest.

Predictive

A 'waterfall' approach that plans scope up front and delivers against the plan.

RACI

A responsibility matrix: Responsible, Accountable, Consulted, Informed.

RAID

A combined log of Risks, Assumptions, Issues, and Decisions.

Risk register

A living list of risks with probability, impact, response, owner, and trigger.

Scope creep

The uncontrolled expansion of scope without matching time/cost adjustment.

SPI

Schedule Performance Index = EV / PV . Above 1 is ahead; below 1 is behind.

Sponsor

The single person accountable for the project's business outcome.

Stakeholder

Anyone who can affect, or is affected by, the project.

WBS

Work Breakdown Structure — a hierarchical decomposition of the deliverables.

APPENDIX B

Sources & Citations

Every external claim in this guide maps to a row below and is tiered: A verified primary/authoritative • B secondary, confirm • C original synthesis. Statistics carry their real year. PMI, ISO, and PeopleCert materials are cited as authority and never reproduced; agile content uses original artifacts citing the 2020 Scrum Guide. A dead link means the claim is pulled.

ID	CLAIM / CONCEPT	SOURCE	TIER
S1	PMBOK® Guide — Eighth Edition is the current edition (Kindle Nov 2025; paperback Jan 2026).	PMI, pmi.org/standards/pmbok .	A
S2	8th-Edition architecture: 6 principles, 7 performance domains, 40 processes, 5 focus areas (down from the 7th's 12/8/49).	Verified against PMBOK® Guide 8th Edition (official text; QA only, not reproduced).	A
S3	Performance domains: Governance, Scope, Schedule, Finance, Stakeholders, Resources, Risk.	Verified against PMBOK® Guide 8th Edition (official text; QA only).	A
T1	~47% of unsuccessful projects miss goals on inaccurate requirements (2014).	PMI, 2014 requirements research.	A
T2	52% of projects experienced scope creep (up from 43% five years prior).	PMI Pulse of the Profession, 2018.	A
T3	Current benchmark: project failure rate 13% (up from 12% in 2024).	PMI Pulse of the Profession, 2025.	A
T5	Project outcomes ~31% successful / 50% challenged / 19% failed (16% successful in 1994).	Standish Group, CHAOS research (methodology widely cited and debated).	B
T6	Large IT projects (initial budget >\$15M) average +45% over budget, +7% over time, and 56% less value than predicted (5,400 projects).	McKinsey & University of Oxford (BT Centre for Major Programme Management), 2012.	A
T7	Agile ~42% success vs predictive/waterfall ~13% success.	Standish Group, CHAOS 2020.	B
T8	Wasted investment due to poor project performance: 13.5% (2013) → 9.9% (2018) → 9.4% (2021) → 5.2% (2023).	PMI Pulse of the Profession (each figure labelled with its year).	A
C1	Earned-value formulae: CV, SV, CPI, SPI, EAC, ETC, VAC, TCPI.	Standard public PM mathematics (PMI/AACE).	A
C2	Risk register as a living, cadence-reviewed artefact with pre-planned responses/triggers.	APM / PMI concept.	A
C3	Lessons learned as a continuous lifecycle activity.	APM.	A
C4	Stakeholder power/interest analysis; RACI responsibility assignment.	Public practice (Mendelow; RACI).	A
T4	Delegation linked to organisational performance (used in place of the unverifiable '25% HBR' figure).	Gallup / LBS.	B
S5	Agile concepts referenced via the 2020 Scrum Guide (CC BY-SA 4.0) as authority; original artifacts only.	scrumguides.org .	A
S6	Governance and lifecycle concepts.	ISO 21500:2021 & ISO 21502:2020.	A
S7	PRINCE2 7 referenced as an alternative method.	PeopleCert / AXELOS, 2023.	A
S4	PMP exam transitions to 8th-Edition content on 2026-07-09.	PMI communications; re-verify before relying on the date.	B

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APPENDIX C

Template Index

Each template appears in the chapter shown, with a filled example and a blank, and is built ready-to-use in the bundled Day-One Toolkit (.xlsx) on the tab named.

TEMPLATE	CHAPTER	TOOLKIT TAB
Project Charter	Chapter 4	Charter tab
Stakeholder Register	Chapter 2	Stakeholder Register tab
RACI Matrix	Chapter 4	RACI tab
RAID Log	Chapter 4	RAID Log tab
Risk Register	Chapter 5	Risk Register tab
Schedule / Gantt	Chapter 4	Schedule tab
Status Report	Chapter 5	Status Report tab
Meeting / Action Log	Chapter 5	Meeting Log tab
EVM-lite Calculator	Chapter 5	EVM-lite tab
30/60/90 Plan	Chapter 3	30-60-90 tab
Change Log	Chapter 5	RAID / Change tab
Lessons Learned Log	Chapter 8	Lessons Learned tab

APPENDIX D

PMBOK® 8th-Edition Crosswalk

How this guide's practical chapters relate to the seven performance domains named in the current edition. The domains are referenced as publicly-described concepts and cited as authority; no standard text is reproduced. A domain names verified against the official 8th-Edition text (QA only; not reproduced).

PERFORMANCE DOMAIN	WHERE THIS GUIDE ADDRESSES IT	CHAPTERS
Governance	Charter, sponsor, decision rights, closeout	Ch 1, 4, 6, 8
Scope	Scope statement, WBS, change control	Ch 4, 5
Schedule	Tasks, dependencies, baseline, critical path	Ch 4, 5
Finance	Budget, EVM-lite (CPI/SPI/EAC)	Ch 5
Stakeholders	Register, power/interest, comms, RACI	Ch 2, 4, 6
Resources	Owners, SMEs, delegation	Ch 1, 6
Risk	RAID, living risk register, triggers	Ch 4, 5

THE INSTRUMENT LINE

When you outgrow doing this by hand.

This guide is the method. The instruments are the method, run for you — offline, sourced, and yours to own. One per way projects are really run.

Foresight

Predictive control. Schedule, earned value, and a 10,000-trial forecast over your real plan.

Cadence

Adaptive delivery. Velocity, throughput, flow and a probabilistic delivery forecast.

Converge

Hybrid. Reads both worlds, separates real slippage from a methodology mismatch.

Show your numbers. Keep them yours.

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