

Project Management Report

**Implementing and Maintaining
Project Management**

Project Management Report

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"Implementing and Maintaining Project Management"

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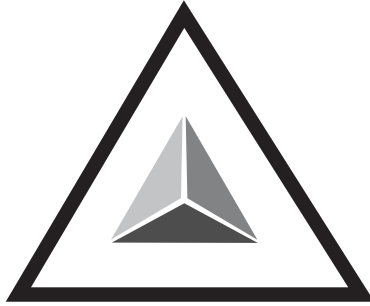
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Robbins-Gioia Presents:
Project Management Report

Implementing and Maintaining Project Management

Volume 2, Issue 1
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Management Essentials

Principles of Project Success

Eric Gioia

Fundamentals to deliver a successful project on time, on target, and on budget

Whether you are managing a large program or a single project, you are responsible for its success. You ensure success by managing risks in the areas of schedule, cost, communication, change control, and many more. The following guidelines will help your projects run more smoothly.

Gauge project extent

Many projects start without full stakeholder understanding of their complexity and size. As the project progresses, the true scope emerges - often too late to adjust resources, budget, and delivery date. Comprehension of a project's complexity will enable the development of well-designed and detailed management plans. These plans require that each project task and discrete work elements be fully evaluated and documented.

Facilitate communication

As organizations implement their project plans, they often fail to communicate them effectively. The project goal, the individual roles, and how each team member's actions affect the project must be communicated clearly. The project manager must constantly communicate project goals and status to senior management and involved business managers. While the project manager may not have the authority to control the actions of others, information will allow him to proactively manage external influences. Full communication will mitigate unforeseen issues caused by uninformed individuals.

Integrate key elements

Successful project management is no longer limited to managing a schedule. Project managers need to assimilate key elements - cost control, configuration management, and resource allocation - to deliver the project on time and on budget. These are entwined in every project; e.g., changes in requirements will affect budget and schedule. By integrating these elements, project managers can understand how changes in one area can affect another, and manage the project accordingly.

Instill quantifiable metrics

Although many believe that a completed project is the chief measure of success, this is not necessarily true. Throughout the project life cycle, there must be milestones with metrics to measure the outcome. Examples of meaningful metrics include delivering a product to market faster by cutting weeks off the process or delivering a product with

fewer operational defects. Metrics enable objective evaluation of project success with bottom-line measures instead of subjective interpretations.

Understand requirements

Requirements creep is one of the leading causes of project failure. To control this, project managers need to thoroughly understand the desired outcome, available resources, and required delivery time frame. Baseline requirements at the start of the project are critical to success. Once the statement of work (SOW) has been developed, the project manager is responsible for managing the project accordingly. The project manager needs to carefully review the addition of requirements or changes that affect the original SOW. As a project moves away from the original SOW, it is difficult to deliver against the original requirements, making the measurement of success impossible.

Develop implementation strategy

A project can have many resources and yet still be unsuccessful if the resources are not integrated into an implementation plan. Developing an effective implementation strategy is key to project success. Unfortunately, many organizations invest time and resources to develop an advanced plan that is never implemented.

Monitor project holistically

Many organizations rely on software tools to manage their projects, which is a strategic flaw. Tools can be used to help track a project, not run it. Software reports can provide valuable insight into the collection of data, development of meaningful metrics, and monitoring of the implementation strategy. Project managers need to monitor their projects from a holistic point of view including data reports, communication with key players, and earned value management.

Align customer and contractor expectations

The project manager and end customer should agree to deliverables and overall project goals. As a team, they should share a single vision for success. The project manager must make sure that he/she is in line with customer expectations. If this does not occur, the customer will most likely be dissatisfied with some or all parts of the project. This result defeats the project manager's most basic goal - customer satisfaction.

Cultivate a win-win attitude

A win-win attitude occurs when the project manager and end customer cooperate to achieve the stated project goal. A lose-lose situation develops when a customer who takes little interest in project progress, outsources it to a contractor who approaches it as a repeatable revenue stream. Customer reliance on a contractor to deliver, while providing little oversight can cause the project to self-destruct. A win-win attitude will minimize conflicting interests and focus efforts on the project.

Formalize project management discipline

Many organizations do not have the expertise in-house to effectively manage large, complex projects. For an organization to deliver successful projects, the knowledge, discipline, and facilitation of project management must be instilled. These skills can be developed internally by instituting an intensive, project management education program or by contracting with an external firm to provide mentoring resources.

Communicate leadership commitment and sponsorship

Senior management must make project success a broadly communicated priority throughout the organization. Most organizations respond when leadership ardently communicates its commitment to issues. For projects to be successful, individuals at all levels of the organization need to remain sensitive to the needs and priorities of the project. The project manager must have a compelling approach to laud project benefits and be able to motivate and inspire those working on the project and those affected by its results. Otherwise, the project goals and successes will not be known across the organization and its true value will be questioned.

Approach projects as a start-up business

Any new project is a large undertaking. Budgets need to be carved out, resources assigned, control systems established, management determined, and goals aligned with enterprise strategy. For these reasons, projects should be viewed in the context of a start-up business. Typically, a project is viewed in the context of an existing project. As a result, resources and budgets are spuriously linked to the detriment of multiple projects. For example, a firm installing a new enterprise resource planning (ERP) system may decide that it needs to upgrade the existing financial system. These are two independent projects; however, they are related. Each needs its own resources to be successful. Without independent resources, the project may fail.

Implementing these guidelines is crucial to delivering a successful project on time, on target, and on budget. How do you ensure that your project will be successful? First, carefully evaluate the existing status of your project. Are you following these principles? Second, review how these guidelines have been integrated into the project. Are there areas where the project could benefit by improving an area? Finally, continue to evaluate your project according to pre-established metrics. If you notice delays or budget issues, verify that one of these steps to success has not been compromised.

Eric Gioia has been with Robbins-Gioia, Inc., since 1989 and currently serves as Executive Vice President for Business Development for Robbins-Gioia LLC, and President of Robbins-Gioia, Inc. subsidiary PM Telco, delivering outsourcing program management to the telecommunications industry.

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Account Management Project Relationships: Making Sure All Goes Well

Mark Baumgardner

An interview with Ann Sachs on supreme customer service

Ann Sachs, Robbins-Gioia's Account Manager for Central Commercial Region/Detroit, describes the art of service delivery management.

The Account Manager Role

Mark: Ann, can you tell me about your role as Account Manager, how that fits in with the project management team, and what your responsibilities are?

Ann: My role is to assure quality delivery of services, which is accomplished in many ways. All of the projects in my area of responsibility, including several automotive initiatives, have either a site lead or a formal operations manager that assure customer expectations are being met, that the people Robbins-Gioia (RG) employs are fulfilling the deliverables as quoted in the contract, and that their people needs are addressed. This role could be described as operations or service delivery management.

With both new and current customers, our service delivery is based on the requirements defined in the negotiations and proposal that take place between the RG Detroit team and the client. The important job of developing the proposal is a joint venture between Operations and Business Development teams. When Business Development approaches us with a new opportunity, it's my job to make sure that the technical solution or the actual project management/program management solution meets the customer requirements. The Operations team writes that portion of the proposal. Once the deal is closed, it's up to my team to be sure that we deliver to the terms of the proposal, absolutely delighting and surpassing the customer's expectations for that service. This means making sure we have the right resources at the right place and at the right time.

Assigning resources can sometimes be a juggling act since not every resource matches every customer need. As the needs of our clients become more and more specialized, so do the needs for training and skill re-evaluation of employees. Sometimes a customer wants a consultant with competency in a specific industry or process which I simply don't have available here in Detroit. The extended Robbins-Gioia family gives me another pool of resources but we sometimes find ourselves balancing the travel and talent with the needs of the customer's budget. Resource management is a large part of my role.

M: It seems that the Account Manager role is a specialty supporting Business Development activities. Would you agree with that?

A: Yes, but it's not limited to that. The close relationship between Business Development and Operations is focused on customer needs during the first contact with a new, prospective client. By the time a proposal is accepted and a contract is signed, the new customer already has a firm sense of the type of skills and experience RG people will bring to his or her solution and a match has been established to meet the needs outlined with the Business Development team. The customer has first hand knowledge that Business Development and Operations are synchronized to hit the ground running at the start of a new assignment. This is one of the differentiators Robbins-Gioia brings to its clients. I sometimes take the lead in renewals, extensions, and expansions of current service with sales team support, of course.

Another role as an account manager is to be sure the success factors are in place for the customer and the RG team. In building customer relations, every effort is made to introduce the on-site RG leadership and staff into the proposal process early so no time is lost understanding the customer's primary issues at the project start date. As a senior project manager myself, I am often called to support those experts on-site. That means when our on-site operations managers are delivering RG services, they know they can count on me for the extras whether it's rolling up my sleeves on site or providing valuable research, resources or thought leadership behind the scenes. Sometimes, I have to do some detective work behind the scenes with my fellow account managers to solve problems outside of our local knowledge. The standard budget, outlook, financial reporting, and HR duties are shared responsibilities but they also factor into a full day's work. The excitement of the job comes when we have a new proposal due, standing customer meetings, and resource assignment decisions all due on the same day!

Particularly in large corporations with large complexity, (General Motors is just one of the large corporations that we deal with), scope definition can reach critical mass somewhere around the first or second month of project initiation and I'm available to assist in sorting out the critical path. The client organization may have identified 20 percent or more scope growth since project startup and may need expertise to stay on track. I'm there to provide consultation or mentorship as well as solution ideas for my team and customer. Often, I act as confidant and direct support to the client at the enterprise level.

Project management is more than the academic knowledge, tools, and methodologies. Those of us who are career PMs recognize software and prescribed processes go just so far. Measurable success comes through the combination of methodology and business experience blended with attention to detail with integrity. That's what keeps the loyalty of our customers and employees.

The Team and Communication

M: How do you interface with the client?

A: Our management team has an established frequency for conferring with the customer and we coordinate on customer “touches” but generally, we do what makes sense. I talk with my customers once a month, sometimes weekly or daily if needed, by phone or email. I try to visit each RG team on-site every other week or at their convenience. There is no substitute for personal contact. There are times when life is too hectic on the accounts for the customer or the team to receive a visit so we honor that. Also, some client's prefer a single point of contact. Again, it's pretty much account specific.

M: How do you deal with customer needs or with pain identified in operations?

A: Customer needs identified in the proposal such as deliverables, risks, issues, or action items receive our attention according to priorities and potential impact to the project. It's part of every project we do. Additional pain, opportunity or service outside of scope is identified often while RG people work daily with the client on-site. Business Development is very experienced with the scope of work and provides insight through a schedule of customer touches. While Business Development traditionally prepares the formal proposal, sets price, and leads the negotiations, a winning team of both Operations and Business Development is required to win a customer to form a lasting partnership.

The Process and Maintenance

M: Once you have your solution proposed and contracted for, how do you proceed?

A: By the time RG has won the confidence of the client and a new contract is signed, we've already been in very close communication on project definition. Typically, the client also had the opportunity to interview the RG site lead. They've probably already met some of the key operations staff assigned to the project during the proposal development phase. The proposal has already given them detailed information about who, what, why, where, when, and how that's going to happen in each phase. We're ready to go!

In the background, the Operations team has done their homework using the RG Solutions Startup Guide. This internal tool is located on our intranet combining the best current elements of PM research with our extensive practical knowledge. There are many embedded, generic templates with instructions on how to start a new contract. It is written and organized in “practitioner” project management language that is recognizable to all PMs. Guidelines for project governance and reporting are also in the kit. We tend to take the practical approach starting right off with a project timeline, an issues/risk log, solid communications plan and governance, keeping it straightforward first and moving to the more complex as needed. We can and do use customer systems or established industry processes, however. For example, many of our clients have proprietary PMO processes well defined for their specific needs.

In many instances, our opportunity is to repair a mature project already experiencing difficulty. A situational analysis might be an appropriate starting point to get noticeable results quickly and get the project back on track. The delta between current status and desired status is determined before an effective recovery strategy is determined. This is an area where I provide input. Even with all these processes to guide us, start-up projects still take on a life of their own and each project is different.

M: Once you are operating on the contract, how do you track, present, and relay the status of a project to a client?

A: Tracking a project's success relies heavily on the way the project was established at the beginning. Typically, the deliverables and change control or governance measures are put right into the proposal along with reporting expectations and frequency desired by the client. The development and start of the governance plan is an important early milestone in the project timeline. The Solution Startup Guide provides recommendations for project stakeholders in choosing appropriate metrics and measures. Some are standard but effective. Some are highly customized, according to project needs. Some have target audiences such as executives and utilizes a summary or dashboard approach. Handy reports provided by tools let you know what tasks are on schedule, which ones are lagging, which ones are at risk and who's responsible. Change control is in place to help us to manage scope creep and keep everybody on track including the client's organization.

Inadvertently, clients can be their own worst enemies. Sometimes, only change control and pre-determined metrics help avoid a wide, scattergun approach, keeping everyone focused on the objectives. That's how the greatest opportunities for resource consolidation and cost savings are identified. All the information gleaned from reports fails to help a project's success if good decisions aren't made based on good information. When trying to get the job done, our role is to work with the client to develop the best decisions relying on the accuracy of the reports we generate so execution to the critical path meets the objective. There are times when a frank discussion among the project leaders is necessary to realign the objectives of the project with the direction given to the team. Sometimes, the management team here in Detroit provides that leadership.

Internally, RG conducts a project health check a new initiative within the first 30 to 60 days at the corporate level. Completed templates contain multiple questions on customer feedback, the business side, and the operational delivery of the new services. An internal conference to review the project status documentation to provide suggestions or to determine if additional help is indicated is conducted sometimes remotely, sometimes in person. I also conduct a local health check with new projects within the first 30 to 45 days.

In addition, I ask project leads to report status on customer satisfaction, master schedule, verification of deliverables and key issues from the beginning to assure that a good start-up is underway. Key elements to look for in a new project are scope creep and potential showstoppers. Experienced PMs know that two weeks into a new project, the scope and the environmental problems can be bigger than you anticipated regardless of the up-front investigation done for the proposal. Solving the wrong problems at

project start-up has a huge negative impact on the goodwill and continuity built at the kick-off meeting and eventual completion dates. If this is evident, it's time for the RG team to re-evaluate the original deliverables with the stakeholders and establish change control on the agreed list with metrics for auditing success. Also, alert observation for negative influences in the new project environment such as current morale, politics, or uneven stakeholder commitment can give a PM early warning about impending roadblocks. A tactful but assertive corrective-action plan needs to be developed with the client and instituted early.

M: How do you secure a client's trust and maintain the relationship?

A: Three words: integrity, integrity, integrity.

Earning a client's trust through integrity is at the core of service delivery. You have to be worthy of that trust. You have to be patient in your approach and emotionally mature. If you are really paying attention to a client needs, not your own needs, and you are taking care of business behind the scenes, you have a good start on earning and maintaining that client's trust. Integrity means keeping your energy and enthusiasm high on bad days, anticipating problems or wins for your client and taking action appropriately, communicating bad news early with suggested resolutions and admitting you don't know but you'll get the answer. Integrity means attention to detail without being asked, spending extra time checking the accuracy of the facts, facilitating that tough meeting with care and patience and exhibiting restraint when project tension runs high. It means courage and, sometimes, personal sacrifice to get the job done without expecting gain. It means thinking at a higher level for the sake of team building and customer relationships.

Integrity begins with the people on site. I don't think there is a magic bullet for establishing customer relationships, however, you better have the top-notch consultants who day-to-day, deliverable after deliverable, look the customer right in the eye and say, "What can I do to make this better? How can I serve you?" and mean it. You have to have that customer focus in your head and heart all the time. My job is to come in behind that good groundwork and see if we can't together, penetrate even deeper into the needs of that customer. I am fortunate. This is one of the most competent teams that I have ever worked with. The teams on-site are outstanding, which makes my job a lot easier. I can't take any credit for what my people are doing well on-site everyday. They're the ones that build that customer trust daily with their actions and commitment. Even so, there are days when relationships are strained. That's when mutual trust and respect shared in the past is put to the test.

Credibility requires integrity but it is also about experience. We have people who engender instant credibility. Maybe it's their own educational or top-notch business background that is quickly recognized by our customers, but it is highly valued as a key project success factor. Unlike companies where project management is a phase or a stepping-stone to another career path, RG's primary focus is project/program management consultation. Employees are either on this path or they are supporting it.

M: Do you have any forward-looking comments?

A: The project management profession has come a long way in understanding what the art and science of PM is while embracing highly technical and complex tools. There are all kinds of highbred management processes in recent years evolved or related to PM such as CRM and enterprise portfolio management. In light of this, I believe the profession is coming back to the practice of PM basic methodology utilizing a better generation of tools to help us do what research what our own experience tells us is best for completing projects on time and within budget. I believe our profession stumbled a bit with tool worship a few years ago. We are now remembering that the art of bringing a project to a successful conclusion has to do with building relationships within solid teams and really understanding how people accomplish work. I'm not bashing tools. We need them as more complexity enters our business world, but putting them into an appropriate context is important. The management of the objectives comes first and then the tool selection.

With more than 10 years of IT project management leadership, Ann has led mostly large scope projects in many areas of IT and business for Robbins-Gioia, GM, Delphi, and EDS. Other projects led were for several Tier I and II automotive suppliers. Systems deployment includes Web, network, and mainframe applications. IT projects include LAN/WAN upgrades such as operating systems, hardware and software refreshes, database conversions and development, SAP rollout, corporate relocations for manufacturing and technical companies, and process documents. Ann is employed by Robbins-Gioia, Inc. and is currently serving as Account Manager for the Central Commercial Region of RG in Southfield, Michigan.

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Project Leadership

Building Passion for the Goal

Alan Randolph

Clear goals build excitement and passion

Passion is what makes projects zoom ahead to success – passion for the project goal. This passion must be genuine and felt by all team members. If you want your projects to succeed – that is, be completed on time, within budget, and with high quality – everyone on your team must have a passion for the project goal. If there is no passion for the goal, there is no success!

In order to excel at this management challenge, you must recognize that you are a leader with little organizational authority but with significant responsibility – also with some very special powers to get the job done. The traditional functional manager relies on position power and predictable work flows. A project leader relies on empowerment of the team and creating passion around new work patterns for the moment. To become an exceptional project leader, you must think and work with a focus on innovation and empowered teams created for a specific, temporary purpose. You need to appreciate that project-oriented work has the following characteristics, all of which make projects difficult and challenging to complete effectively:

1. A unique, one-time focus.
2. A specific need or problem to address.
3. A start point and a finish line.
4. A time frame for completion.
5. An ad hoc, cross-functional team.
6. A limited set of shared resources.
7. A sequencing of interdependent activities.
8. An end user of the final deliverable.

Effective project leaders understand these aspects of projects and how they contribute to numerous problems in getting the job done. Still, exceptional project leaders make things happen in spite of the problems they encounter, but they do not do it alone. More than just powerful leaders, they are facilitators of applying the power of others. They know how to use the experience, knowledge, and internal motivation of all the team members to get the job done on time, within budget, and with high quality. So, what is the secret to their success?

Part of the secret is how they visualize what must be done in project work. They know how to create a dedication and passion that encompasses the entire project team and all stakeholders. Exceptional project leaders help everyone distinguish between “a day at work” and what Tom Peters calls “a WOW project” (what Barry Posner and I call a “checkered flag” project in our book *Checkered Flag Projects*). Some of the distinctions are as follows:

A Day at Work	A WOW Project
A job	A performance
Putting in time	An act of unbridled passion
Forgettable	Memorable
Numbing	Exhausting
Tepid	Hot
Ho-hum	It matters
Risk-averse	Adventuresome
Hidden	Exposed
Another day older	Growth experience

You may be asking, how do they make this transition, how do they create a fabulous experience in their projects? Such transition in the minds of people is not easy, however, the following is a discussion of the skills and techniques to use to create this passion.

One key idea to remember is that effective project leaders build in the time necessary (time the rest of us say we do not have) to plan their projects with all stakeholders and with their team. They take the time to create a clear and understandable end goal that generates a passion for everyone involved. Too often, ineffective project leaders try to complete a project without a clear goal. They use a “Let’s make it happen in the field” mentality, so it should come as no surprise when they encounter huge, unexpected problems that “blow the project out of the water.” Effective project leaders appreciate the need to go slow at first, so they can go fast later. Because no project ever goes 100 percent according to plan, going slow at first enables everyone on the project team to have a better idea about what to do when things go astray. Good planning leads to smaller problems during implementation, which facilitates “going faster later.”

A second major idea to remember is that effective project leaders involve a large number of people in the planning process. They get many people involved in asking a lot of risk assessment and contingency questions like: “What if this happens?” and “What could go wrong?” They anticipate problems and disagreements and take steps to build powerful agreements out of these conflicts. They build a strong sense of commitment and passion in all team members. They make certain that everyone involved in the project, people from across functions and organizational layers, is “signed up” and

motivated to make the project succeed. They keep people focused on the goal, informed about progress and involved throughout the implementation process, continually soliciting inputs and suggestions.

A third major idea is that effective project leaders know when to stop planning and move into action. They have developed a sense for when the planning phase has exhausted the *what if* questions (at least for now). And they understand how to help team members find a common ground, enabling project participants to work through their inevitable disagreements.

During implementation, effective project leaders employ their power to facilitate the application of the project team's power to push the project through to completion. They know how to develop credibility with their constituents and are able to unleash everyone's creative energies and focus them on getting the job done. In short, they know how to build, maintain, and focus passion about the project goal in each and every team member.

Setting project goals that are clear and compelling

Many project managers, as well as those in upper management, think it is easy to set goals for a project—just state them. But it is not that easy. It's hard work to set clear and compelling goals. It is also the most important action you can take at the beginning of a project's life. What does it take to set a good project goal? What are the criteria of an effective goal, and what process will yield the clarity and passion you need?

In setting a project goal, you are trying to do two things:

1. Focus yourself, your end user, and your team on the target.
2. Create agreement, commitment, and energy for the project goal.

From where does this clarity of focus and energy come?

Ineffective project leaders often complain that they cannot get direction from customers and/or upper management. We have often heard people say that end users can state what they do not want, but not what they want. This is a cop-out by the project leader. When the goal is not clear, you must lead the end user through a process of goal clarification. And it is this process that takes time, energy, and dialogue. It is a process that involves conversation and discussion back and forth with the end user as you work toward a clarity of direction for the project. It is a process built on listening, dreaming big, and involving a significant number of people.

Since each project is to varying degrees unique – not something that has been done before – it is difficult to be clear on a goal right away. And since goal setting is a process of dialogue, it can start in one of two ways:

1. End users can tell you what they want.
2. You can tell the end users what you understand to be the goal for the project.

Print the goal on paper and show it to the end user in person, while you say, “Here, this is what I think your project goal is. Have I got it right?” This gives the end user the option to say, “Yes, I agree. That’s correct. Proceed.” Or, “No, that’s not what I meant. Here’s what I meant.” As you go back and forth in this dialogue, you move closer and closer to achieving clarity about the direction and end result of the project. Too many project leaders feel they do not have time for this kind of dialogical goal-setting process. Yet it is amazing how many seem to find the time to correct the problems that result from poor goal clarity!

The best way to capture the project goal is in a statement of project results: How will we know we are finished? What will the end result look like? What will be different and/or better about the way we do our business? Effective project leaders do this by stating their goals in user terms. Think about this for a moment. Who is the user of your project? What does your user – client, customer, account, patient, or manager – want from you? What does the end user say they want this project to “fix”?

A user doesn’t care, for example, that you are trying to produce a new accounting system (one ineffective way to describe a project’s goal). The user cares about obtaining certain information about inventory and sales at the end of the day. Providing a system that meets the user’s needs is your goal; designing a new accounting system is your process for doing this. Putting yourself on the user’s side improves your chances of hitting the target.

In fact, if you do not define the goal in the end user’s terms, the project may be done for the wrong reasons. For example, an information system was installed at a teaching hospital to provide patient information to the faculty for medical research. Every faculty member was given a personal computer tied to a network for access to the data. When the system was installed, no one could understand why the faculty did not use it. Hospital administrators wanted the system installed because they thought it would help the faculty with their research. Since they were the ones who made the contract with the consultants and paid the bills, they were perceived as the end user. But, in fact, the faculty members were the true end users, and they were never consulted about the system. A great system was installed, but it did not consider the needs of the actual end users. It failed miserably!

Lest you move too quickly, you must consider how to involve the team members in this dialogue as early as possible. This can sometimes be difficult because the team may not yet be identified or “signed onto” the project. But don’t let that stop you from expanding the conversation to include others in your organization. You need perspective from as many team members (or potential team members) as possible. Why?

First, it helps you “dream big” in re-framing and clarifying the goal to create a compelling vision of the project’s end result and its value to the organization. Second, it begins the building of a shared passion about the project that will drive the team’s desire to get the job done in exceptional fashion.

As you work to articulate the project goal, try to boil it down to its essence and then run this by team members. Ask if it makes sense. Ask if they have better ways to shape the goal statement. Ask their take on the problem this project will fix or the opportunity this project will seize. You want to draw widely to yield the most compelling and useful project definition you can. At the same time, you want to begin building a burning desire in people to want to be a part of your project team (even if they are assigned to the team by no choice of their own). You want and need clear vision and passion from your team about the project goal.

The criteria to create passion — “Power Goals”

As you work to establish the project goal in end user, outcome terms, it is very helpful to state the goal in terms of five important elements. These characteristics are captured in the term POWER, an acronym for the aspects of a goal that are likely to provide focus and create commitment for the project. **POWER** goals are pinpointed, owned, well-defined, energizing, and resource-framed.

Pinpointed. Your goal should be so pinpointed, so specific, and so clear that anybody with some basic knowledge of the project area can read it, understand it, and know what you are trying to accomplish. Can it pass the “you’ve only got one minute to explain the project to a new team member” test? Could you drop dead tomorrow (of course, we do not recommend that you test it this way) and somebody else pick up the goal statement and know exactly what is the project’s purpose? It should be that clearly framed.

For example, a non-pinpointed goal might be stated: We need a new marketing piece. But for what product, by whom, at what cost? To make this goal more pinpointed, we might say: We need a new marketing brochure for product X within three months at a cost of less than \$15,000. With this second statement, it is much clearer what needs to be accomplished. There is much less chance of confusion by the end user or the team.

Owned. For a goal to be effective, ownership must be created and based upon understanding and buy-in from all parties. The end user, be it a customer, upper management, or a peer in your organization, must agree that the project goal is desirable. Stated differently, the project leader and the project’s customer must agree that the end result should solve the problem or respond to the need that led to the initiation of the project. The more people that agree upon and own the goal up front, the easier it will be to develop a viable plan for the project. This solid ownership will make it easier to respond to changes that may require modifying the goal as the project unfolds. Ownership is based on sharing information, and it builds commitment and passion for the project.

Sometimes reaching agreement and ownership can be difficult. It may take extensive dialogue to help all parties understand each other. And it usually helps if the project leader can focus on understanding what the end user really needs. Those needs should be the ultimate focus for defining the agreed-upon aspect of the goal. By identifying and focusing on these needs, you build into the goal a sense of meaning and significance for the project. Passion, energy, and commitment flow from the ownership-building process.

Well-defined. To manage a project to successful completion, you must create a well-defined description of what successful completion will look like. You have to be able to measure the goal in order to know the real outcome of the project. What will be different and how will we know it is different? Ineffective project leaders often wrongly say that some project goals cannot be measured. Every goal can be measured; however, it's just that some goals can be measured more easily than others. In fact, developing clear measuring standards for the more ambiguous and fuzzy kinds of goals is where you should spend the most time. The chance for confusion is too great in these situations not to spend time creating useful measures. Without well-defined goals, members of your team cannot get any sense of direction, and they wind up like the archer shooting at the wrong target. Project participants need to work on measurable activities, even if the measures are crude, in order to know what to do. And you need a well-defined goal if you are to manage it.

For example, Ken Blanchard, co-author of *The One Minute Manager*, describes how a large bank wanted to create an image of friendliness, but nobody knew how to measure friendliness. Top management felt that bank personnel were not friendly, and a survey of customers confirmed this feeling. The consultants called in to work with the bank decided, after much discussion with bank personnel, to measure friendliness in a unique way. They would count the number of comments between customers and bank personnel unrelated to work—comments about the weather, about how somebody was dressed, or about how cousin Johnny was feeling these days. The consultants found that very few of the comments between bank personnel and their customers were of this non-task-related variety (about one comment per customer interaction). The goal established for the “friendliness project” was to increase the number of non-task-related comments per customer interaction from one to four. All bank personnel got involved. They talked about the goal with the consultants, they discussed examples of what to say, and they worked at it. After five weeks of observing, the consultants determined that the number of non-task-related comments per interaction had risen to four. A follow-up customer survey revealed that their perception of the bank's friendliness had gone up dramatically. Now this is not a particularly brilliant measure of friendliness, but it worked because it helped quantify what people should do. It gave people a target at which to aim. They could also measure their own progress. Having clear measuring standards is a vital part of the process of setting effective goals. Such standards as quantity, quality, time, and cost are the most useful to work with in establishing measurable standards.

Energizing. Project goals must be energizing, and this energy comes from a feeling that the goal is realistic and doable, yet challenging. All too often managers set goals that are impossible to achieve, given the resources, knowledge, and time available. Project

leaders who allow this to happen set themselves and their teams up for frustration that saps energy. This does not mean that goals should be easy to achieve. They can and should be challenging in order to build energy, but if they are unrealistic, they will instead diminish energy. How many times have you been assigned a project and a deadline before the goal is clarified, only to find out that the project cannot possibly be completed on time? When you and your team realize the impossibility of the situation, everyone tends to give up before the race even begins.

One of the benefits you derive from dialogue in the goal-setting process is determining whether you are talking about a goal that is realistic, given your resources. You have to question this assumption explicitly. Don't just say, "Sure, we can get that done." Discuss resources, budgets, personnel, and timing to determine how realistic the goal is. Making it realistic may mean adjusting the goal, the deadline, and/or the resources, but realism is critical for the energy that leads to success.

Energy that comes from the project itself also means that even though the project is unique and different from your past experience, it should not be totally alien to project personnel. If it is, you are asking for trouble. In this case you will need to set aside time for research and learning, or perhaps engage consultants or hire new project members or even delay the project. You should not get trapped into doing things you know too little about, unless you want to fail.

By the same token, however, you should not just take on projects that are a snap. Energy comes from taking on goals that are a challenge and that make a difference in your organization. Passion is a must, and it comes from the joy of tackling a challenge that is a stretch, but not a stretch to the breaking point of your ability and that of your team.

Resource-framed. Finally, you need a goal that is resource-framed. How much time and budget do you have to accomplish the project? Is there any flexibility in the deadline? Is there any flexibility in the resources available for the project? This goes back to looking at what is attainable. You want to set a deadline that is reasonable, given the resources available and the amount of knowledge and experience you have with this type of project. In addition, you want everyone involved in the team to clearly know the resource constraints and deadline so they can act in an empowered fashion to help get the job done on time, within budget, and with high quality. Clarity about resources is critical to project success.

An example of a really important goal

Consider, for example, the project that God gave to Noah. God's voice boomed, "Build an ark of gopher wood, 300 cubits long, 50 cubits wide, and 30 cubits high. And do it in seven months, when I will destroy the earth by flood. Take a male and female of every animal; we are starting over." Pretty important goal, right? If Noah had failed, the entire human race would be wiped out; Noah had to develop a POWER goal and an effective plan for the sake of all people on the earth.

So, let's see. Was the goal pinpointed? Yes, it was clear that Noah had to build an ark. Owned and agreed upon? Who can argue with God? Noah believed God was telling the truth about the coming flood; hence he accepted the fact that he needed to accomplish the goal. Well-defined? Not too clear on the animals but clear on the dimensions of the ark. Energizing based on a feeling that the goal was realistic? Yes, Noah was a fisherman who knew about boats; he knew it was possible to build this ark. Resource-framed? Yes and no. Rains were to begin in seven months; costs not clarified. So we can imagine some discussion between Noah and God about the project planning. Noah questioning God on size, type of wood, animals to be excluded/included, why the flood; and God explaining and refining the goal until Noah was completely clear about it. Perhaps you have similar discussions with your supervisors. The question to ask is, does your project have a POWER goal? If not, keep working at it until your project goal meets the POWER criteria.

Why not take a minute now to write down the goal for one of your projects. Then check it against the POWER criteria. Is your project goal a POWER goal: Is it pinpointed, owned, well-defined, energizing, and resource-framed?

The importance of spending the sufficient time and energy on the goal-setting process cannot be overemphasized. As winning project team leaders have told us: Goal setting takes significant time and energy, but you can't reach the finish line and get the checkered flag without clear and compelling goals! Effective goal setting is crucial for your projects because it provides a common vision that gives members of the team a sense of ownership. Clear goals build excitement and passion. They keep the team members focused throughout the project completion process. And that shared passion and commitment to a clear project goal is what leads to fantastic project success!

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The Marketing Project Marketing Professionals are Project Managers, Too

Gregory Smart

Lessons learned from the unique challenges of the marketing project

Today's marketing professionals are working under tremendous pressures to reduce marketing costs while still producing the marketing results to grow the business in a globally competitive environment. In addition, rising customer expectations and an incredible pace of change is decreasing product life cycles and creating the need to develop and market more products...faster. As a result, marketing professionals are managing an increasing number of fast paced projects with limited budgets, pressures to produce immediate results, and resources that don't like to be managed in a structured project management environment.

If you are a marketing professional and these project management challenges strike a chord for you, don't despair. Your projects are riddled with the same challenges that project managers around the world are facing each day and there are lessons to be learned from their mistakes and successes.

Choose the right projects

Choosing the right projects to complete is the first step for a project manager. It is important to distinguish the projects that are valuable from those that don't have the clarity or value to succeed. Challenge each project with questions such as: Do the results of this project fit into our business strategy and goals? Can we align this project with a financial return to the business? Are we solving a customer problem or business problem with this project? How risky is this project? Your ability to answer questions like these will help clarify which projects are ready to be managed and completed.

As obvious as these questions sound, they are often overlooked by project managers or it is assumed that executive management has already approved projects because of alignment to the business. Once you have asked some challenging questions about the projects and have selected the right projects, writing a one-page project concept document is the next step.

Write the one-page project concept

One of the most important tools that you will have for fast paced marketing projects is the one-page project concept. The one-page project concept is a document that is used to clarify the project for you, executive management, the customer of the project, and

everyone who is contributing to the project. The communication vehicle is concise, readable, and communicates the following pieces of information:

- Project title, author, date last updated.
- Background and customer or business need for the project.
- Description of the project end result or deliverable.
- Scope of the project in terms of geographies, products, and markets affected by the end result or deliverable.
- Key business strategies and objectives the project is supporting.
- Financial, personnel, and technical requirements for the project.
- Key dates for the project including start, end, and other significant milestones.

With the one-page project concept you will be able to communicate effectively and get the support you need for your fast-track projects from both executive management as well as those people who are going to be assigned to work on the project. When the project team understands what the marketing project is going to do for the business, each individual will be mindful of the project as a whole as they contribute their part.

Organize your project around deliverables

Another common challenge is, “How do I organize the work in a marketing project?” Many marketing professionals want the project to be organized in a way that will minimize the time necessary to manage the project, yet flexible enough to accommodate the certainty of change to be encountered along the way. The answer is to organize your project around deliverables.

Think about the whole project you are about to undertake and break it up into three or four phases from concept to completion. These phases could be as simple as start-up, research, draft, production, and wrap-up. Next, identify all of the deliverables and interim deliverables that will be created leading up to the final deliverable for the project. Sequence each of these deliverables, estimate the time and costs required to complete each deliverable, and place them into the appropriate phases identified earlier. Finally, assign each deliverable to the appropriate project team member and help them understand their responsibilities.

As a busy marketing professional, this is the level of detail that you will be able to realistically manage. The completion of interim deliverables is easily tracked and the progress of the project toward its final deliverable and result can be easily communicated. In most cases, by allowing individual project team members to feel ownership and responsibility for completing the interim deliverables identified in the project, they will leverage that freedom, rise to the challenge, and engage their creativity to complete the work. In addition, as a project manager you have a structured and flexible project for adding and removing interim deliverables as the project changes.

Reuse your project plans

Projects do get easier when you can reuse the knowledge and plans from past projects. Most project managers will try to find a similar project plan for use on a new project. Fortunately, marketing projects are very repeatable. For example, once you have successfully completed an advertising project, the phases, deliverables, and estimates can be used for quickly turning around another advertising project even if the audience, message, and other creative aspects are completely different. Even if the project does change and deliverables are added or removed, document those changes and keep an archive of your projects. Later you can review your past projects and find patterns of best practices and leverage that knowledge on your future marketing projects.

Successfully managing a marketing project depends on practicing project management techniques to get results for the business without inhibiting the creativity of the marketing team contributing to the project.

In conclusion, it is paramount for a marketing project manager to ensure the project is aligned with the business. Develop a concept document to communicate what the project is and to gain support. Once that is accomplished, you can organize the project by phases and assign team members to the deliverables. While you want to use the plan as a progress checklist, you can also document any changes and additions to the project. This will allow you to reuse the project plan in the future, which is a smart use of your time.

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The Small Business The Growth of Project Management in a Small Company

Brian Ocheltree

How project management developed as a company grew from 7 to over 70

I have learned from my own experience, and from my brightest team members, that project management is essential, even at the earliest stages of growth. However, it's not something that can be installed and left alone. Once project management is implemented, its concepts, processes, and technologies need to be assessed and altered throughout a company's development. If you are truly receptive to change and proactively responsive to mistakes, project management practices will evolve naturally.

In 1997, with just seven employees, we saw the need for project management, but we weren't calling it project management just yet. The discipline was born of the practical application of management concepts. Internally, if someone had a way of doing something and it worked, he or she imposed that on others. Externally, as the company became better known, we recognized that it was important for us to standardize how we appeared to the outside world and to clients, not to mention how we managed our production process.

Employee count grew to about 30 employees by 1999 and we were basing our project management strategies on those common to other technology firms. Basically, the person who sold the project – a Web site re-design, for example – would also manage the project with the production team. We called that person the “account executive.” It wasn't long before we recognized the need for a different way to manage our projects. The company had grown rapidly and the average project size had increased to the point that managing deliverables and client expectations was difficult.

We're in an industry where the deliverable is very subjective. We solve complex problems through architecting user-centric e-business solutions that are based on technology and creativity. In the e-business application development space, the options and the variables change every day in a way that is impossible to predict. So there we were, committing to a deliverable at a fixed price without enough information to do it accurately. We were experiencing project overruns. We were having projects that were way underestimated, or the clients were expecting “x” and we were delivering “y.” We realized that we needed to have a person who was solely focused on managing our projects. That's when we separated the project management role from the account executive role.

A new layer of management

My partners and I made our most successful account executive a project manager. He managed all of the other account executives' projects. Over time, we created a development process that we could manage. As it matured, we added stages for usability, requirements definition, work distribution and tracking, quality assurance and testing, all following best practices. Since then, our overruns are practically non-existent, and we are able to create predictable results.

Surprisingly, the rigors of project management did hurt us for a period of time. We were so focused on developing processes that yielded particular results that our project managers would knee jerk at anything that ever jeopardized the predictable result—including the client. We found we were coming in on target and on time, but the client was sometimes unhappy because we weren't communicating with them in a productive and positive way in situations where scope change was an issue.

Project manager as politician

Our success in completing projects on time and within budget gave our project managers a strong sense of ownership, yet to a fault. They saw the projects as theirs and treated the clients as a threat. In response, we provided our project managers with a training program on their roles as consultants, or, you could say, on their roles as soothsayers, psychoanalysts, and politicians. Today our #1 priority is customer satisfaction. Our project managers understand that we can do everything by the book, but if the customer is unhappy, we've failed.

If the client wants something that we don't think is appropriate, it is our role as a consulting firm to supply their options. For example, "We think you might consider doing it this way because you have an overlap of resources here." Or, "You can improve the ROI by changing this." If the client says, "Okay, I understand that but I don't want to change," we need to pause and support their wishes. I don't feel like I'm in the business of telling other people how to run their business, because it's very unlikely that I know their business better than they do.

Beyond supplying clients with their options and supporting their wishes, project managers seem to face a greater challenge when they are tasked with presenting the client with bad news, whether it's a budget overrun, a missed deadline, or work needed that wasn't in the original project scope. I think it is easier to train process than to train a project manager how to deal with a negative situation in a positive way such that the client does not get angry or lose respect. For example, a client requests something that is out of scope. How can you deal with that in such a way that the client understands that the initiative is out of scope, but the need and the additional cost are justified? We've learned that this is something that is not that standard in the skill set of the people you hire as project managers, and it is more common in a person with a sales background.

Justifying change

We have found it is easier for our project managers to present clients with changes in scope, in cost, or in timelines when it doesn't come as a surprise either to the project manager or to the client. We make that possible, or at least more likely, through a custom intranet that we created for project management. This tool was, in fact, our first conscious move toward project management and away from account management. It has been invaluable.

We have found that to manage a project successfully, we had to give the project managers a tool that allowed them to quickly decipher the status of a project before it was too late. In other words, if a project manager comes to me and says, "I have good news and bad news. The project is done, and we're \$50,000 over budget." At that point, we can't go back to the client and say, "Here's your project, and you owe me another \$50,000." Even if it's justified, it's too late. We have to have an early indicator, and "Maddog," our intranet, does just that.

Every employee in this company enters every hour in every day in 15-minute increments; that time goes against the task, which goes against the project, which goes against the client. And those tasks are pre-assigned by the project manager or the department head so that each task is completed only by the assigned individual. This gives us the early warning indicators we need.

For example, take a \$500,000 project that we are one month into. A project manager or a department head assigns a task to a designer, and the designer knows that his or her individual portion of the project is estimated at 50 hours. Every day, that designer has to log time against that. If that designer comes back and says, "I've logged 30 hours to date and I think I'm 10 percent done," that's a red flag, and that will show up on the project manager's report. That early warning indicator allows us to go back to the client to explain that the hours were underestimated, how it happened, and how it can be remedied. Our clients have responded well to that.

The future of project management at e.magination

You can see that one of the most critical pieces of our process is our intranet tool. The tool truly gives our project managers the ability to keep their fingers on the pulse of a project, day-to-day, hour-to-hour. With that intranet as our foundation, we're continuing to review our process on the human resources side of the equation. In fact, we've come full cycle, and are looking at ways to create an account management role, blending the best of what we've seen so far. This reflects a trend we're seeing in the project management realm, where an account manager is encouraged to stay involved with the project and with the client from a customer service angle. Account executives still handle sales and new business development; project managers are still the ones who manage the deliverables and the results; and the account manager walks the line to ensure customer satisfaction and look for new opportunities. Our goal, always, is to discover what is understandable and repeatable of the concepts and processes of project management, and to increase the number of successful projects going forward.

Brian Ocheltree founded his first business, Micropro Consultants, while completing his Bachelor of Science degree in Mechanical Engineering at the University of Maryland, College Park in 1988. His firm was acquired by Friedman & Fuller, PC, a public accounting firm in Rockville, MD. He then served as Senior Vice President of Zyzyx, a Virginia-based computer consulting firm, for two years, and in 1992 went on to found BSO Associates, Inc., a network services firm. In 1999, BSO merged with another firm to create e.magination where Brian serves as CEO.

Brian serves on the Microsoft Partner Advisory Council in the Collaborative Solutions and Portals PAC, the Internet Advisory Council, The Governor's Workforce Task Force, Eagle Eye Board of Advisors, and the board of directors for several technology firms.

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The Independent Contractor The Contract Project Manager: Free Agents and Pinch Hitters

Donna Fitzgerald

Four areas where contract project managers provide a clear value proposition

In the not so distant past, almost all non-construction project managers were of the accidental variety. Companies staffed project management positions by picking functional managers who showed solid potential to move up the ranks into senior management and offer them the challenge. The challenge was always perceived on both sides as a very high-risk situation in which a manager agreed to step out of his or her day-to-day management job to run a high-visibility project. If things went well on the project, the manager could expect to be promoted. If things didn't go well, the odds were that there would be no job to return to at the end of the project.

From management's perspective, project work was the ultimate management training program. A project allowed clear visibility of how the individual in question worked under pressure, how risk was handled, or how the individual performed in a consensus-building environment. From the accidental project manager's point of view, it usually afforded the opportunity to build name recognition among the company's ruling elite, which would hopefully translate into support when a senior management opportunity became available.

Running the gauntlet of project management was a normal part of every ambitious manager's career until the 1990s shattered the relationship between company and employee. Re-engineering and a relentless focus on cost reduction might have been good for many things but it did irreparable harm to the notion that a career was built through loyalty and good work at one company.

According to Newton's third law, for every action there is an equal and opposite reaction somewhere in the system. In our example above, we see the corporate action of thinning the middle management ranks (the traditional source of accidental PMs) being offset by the reaction of creating project management as a formal profession. The growth in membership of the Project Management Institute (PMI®), from 8,500 in 1990 to more than 100,000 in 2003 proves this point dramatically. Additionally, once project management became a recognized profession, the best and most experienced project managers had the opportunity to choose to become free agents. Rather than stay at a company for years and handle projects occasionally, some of the most talented and capable individuals have made the decision to manage projects full-time – even if that means moving from company to company or state to state to follow the work.

For some companies, the thought of hiring a contract PM to run a project is a perfectly acceptable proposition. The following demonstrates four areas where contract project managers not only provide a clear value proposition, but also serve as the superior choice to having an employee fill the same role.

Peak loading

The most common reason to hire a contract project manager is when there is simply too much work for the existing staff to handle and it just has to be done. Project work by definition has a beginning and end and often there is no particular reason to increase the permanent staff. Hiring a contract project manager also allows for a number of benefits:

- They can provide experience in specific problem solving.
- They can manage their project without challenging the current political structure, and therefore obtain cooperation and consensus more readily than an employee might in some circumstances.
- They don't have ongoing responsibilities, therefore, they can focus on a single project and get things done more quickly.

The best way for a company to approach this is to develop a working relationship either with a firm that specializes in project management (not a body shop of temporary employees) and/or with a number of trusted individuals with whom the firm can build an ongoing relationship.

Let's take an example of what this concept might look like in practice:

Clarity Electronics has just finished evaluating their project portfolio for the second half of 2003. Information technology spending is going up only slightly but they have a vast amount of work they want to accomplish in the next six months, including a business intelligence project and some rework on the CRM applications they tried to roll out a couple of years ago. They review their available resources and determine that it makes sense to have their existing employees work on the new Business Intelligence System but that the CRM project really would be better run by someone who has actually seen a CRM system work well at another company.

The company maintains a small database of every contract PM who has worked for them in the past and it's a quick process to look up resumes. In this case, it turns out that Jane Anderson has CRM experience and that she's received good marks from the team she's managed at Clarity before. A quick call to Jane finds that she'll be available full-time in four weeks but can free up a few days before that to get some advanced planning activities kicked off. Approximately four months later, Jane and the team have been able to work with the sales staff and re-implement the lead tracking module in a much easier to use manner. Jane goes off to work on her next client and the project team has had another opportunity to work with and learn from an experienced PM.

One key factor is that Jane didn't have a learning curve. She already knew the company, knew most of her team members, and had even met a few of the stakeholders on the last project she had done for Clarity. In our example of a 120-day project, Jane was able to bring to the company both the unique knowledge gained elsewhere (a working CRM system) and her familiarity with Clarity to bear on the project in order to get it done quickly. Jane was also able to avoid the problem of contractor resentment that keeps some companies from hiring outside consultants. By working for the company on a number of short-term projects, it is clear to the employees that she is operating in a peak load capacity and that she isn't taking work away from them. Also, by choosing to hire a PM with specialized knowledge, it becomes clear to the staff that Jane (in this case) is bringing something none of them would have had the opportunity to acquire. Going outside of the company becomes not just necessary but a good thing.

The program manager/project manager model

Another effective way to use contract project managers is in support of very large or very complex projects. If we move ahead one year in our example, the company has now chosen as their primary project a complete rollout of the latest software from Microsoft. This software rollout will touch every desk in the company and will need to be coordinated in seven sales offices and three division locations. In this case, the role of the contract manager is to become the aide-de-camp of the company program manager.

For our purposes, we'll define the program manager as being primarily focused on meeting the needs of the sponsors and stakeholders, whereas the project manager is focused on the day-to-day operations of the project. Some companies leap to the conclusion that this project management role is by definition a subordinate position that will require less experience and less sophistication. They therefore staff it with a young inexperienced PM in order to preserve their employment hierarchy and salary scales. Although there are some times when this might work in general, on mission critical, high-risk projects, it is a terrible mistake.

The goal in the program manager/project manager staffing model is to effectively clone the program manager; and in order to do that, it is necessary to hire someone of equal skill, background, and ability. From the point of view of promotional opportunities, salary scales, job grades, etc., the simplest and easiest way to accomplish this is to bring in a contract project manager. This person is able to function as a peer and help get the job done; however, since they will be leaving at the end of the project, the company hasn't been forced to invest in a duplicate resource for one project only.

Another factor that can make this relationship work particularly well is if the contract PM is comfortable operating in a people management role. As the person in charge of most daily activities of the project, they see the members of the project team up close. They need to be comfortable providing guidance and direction not only on project tasks but also on any area where the team member might need management guidance.

The consultant PM as mentor

This leads directly to the third possible role a contract PM can play: mentor to an employee PM. For companies that aren't large enough to have a PM center of excellence, being able to provide mentoring and guidance to an up and coming employee is money well spent. The relationship of a contract PM mentor to an employee is different than the model we discussed above. In this case, the PM mentor is always the more experienced member of the team. The PM mentor in general does not take on a day-to-day project role and serves primarily as reviewer, facilitator, and advisor. Hiring a contract PM into this role is usually the only option for a smaller company because it's difficult to justify the cost of a very senior person in an oversight and support role unless they're working with a significant number of people.

Most project managers would be delighted to have their company make this investment in their career, but according to Barry Sweeny (the mentor of mentors) it is critical that the employee PM commit to the following:

1. To defer to the greater experience of a mentor.
2. To learn through others' experiences and mistakes and avoid learning by trial and error.
3. To take the risks of discussing their weaknesses and needs, and of learning in front of someone more senior.

Surprisingly, these three steps are usually easier for an employee to do with a mentor brought in from the outside than to do with a company mentor/supervisor. A contract PM mentor is almost always perceived as less of a threat and as more of a safe ally to learn from than a senior-level employee.

The consultant PM as head of the PMO

Contract project managers can bring unique value to a company in running their project management office (PMO). Consider the following reasons:

- The right consultant PM brings extensive experience in running project management organizations that actually work. Assuming the company is willing to avoid remaking mistakes others have made, the payback and results from a PMO can be rapid.
- A consultant is free of the company's promotional pressure and therefore can focus on the job at hand.
- A consultant is usually interested in achieving results and not personal power. This should make the recommendations and design of the PMO lean toward lighter weight, more sustainable processes.

By making the decision to staff the PMO with a known, trusted external resource, the company can increase their flexibility without running the risk of building an unnecessarily bureaucratic organization. A number of consulting companies specialize

in providing this type of support. When it's done right, the company purchasing the services will actually spend less money than if they attempted to build a PMO from the ground up themselves.

Maximizing the free agent relationship

The world has changed from the days of the accidental project manager. Companies no longer can count on having the right people with the right experience on staff. In order to stay competitive, companies need to know when to bring in help from the outside. Contract PMs can offer significant value to a company through peak loading, program/project support, mentoring, and PMO leadership. The highest value can only be realized, however, if the company and the contract PM both agree that the maximum benefit for both parties comes from developing a stable longer-term relationship. From the perspective of the company, this means dealing with firms or individuals that specialize in project management and who are willing to invest themselves in adjusting to the needs of the client organization. From the perspective of the contract PM, this relationship requires respecting and accommodating the company's unique culture, being willing to manage employees and not just tasks, and in general being willing to go the extra mile in order to get the project done.

The re-engineering movement of the 90s and the downsizing of corporations has created a situation that all the king's men can't put back together again. On the other hand, the new relationship can yield some efficiencies and benefits that weren't possible in the old full-time employee model. All it takes is the commitment on both parties to establish a long-term as opposed to full-time relationship.

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Ms. Fitzgerald is also the cofounder of the NewGrange Center for Project Management, a nonprofit professional society with worldwide membership. She is the creator of the Nimble Approach to Project Management and writes a frequent column for PM Boulevard and other project management publications. Her work on the uses of chaos theory in project management has been included in the book, *Managing Complexity in Organizations: A View in Many Directions*, by Michael R. Lissack.

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Time Management

Time Management Made Elementary: How Do You Measure Up to These First Graders?

Lynnette Simpson

Lessons learned from a first grade classroom

That which we persist in doing becomes easier for us to do. Not that the nature of the thing itself has changed but our power to do it is greater. –Ralph Waldo Emerson, 1803-1882, U.S. poet and essayist.

Time management is a critical skill for project managers. It is not restricted to the business world, but can be applied to unique venues such as a first grade classroom. If you think you cannot learn from a six-year-old, read on. These students have mastered time management skills by using the following strategies:

- Create a visible task list with daily achievable tasks.
- Prioritize work based on urgency, importance, and difficulty.
- Persist until natural rewards follow.

The following anecdote illustrates how this team completes their tasks, which results in increased productivity, confidence, and pride. See how you and your project team measure up against these students.

The project manager is Ms. Mimi Stevenson, first grade teacher at Stoddert Elementary School, in Washington, DC. For the past 25 years, she has been instilling time management skills in her students to help them succeed in school and in life. On a daily basis, she succeeds in getting the students to organize, prioritize, and complete every assignment.

Daily, visible task list

One crucial element for the students' achievement is how Ms. Stevenson sets them up to succeed. She has their daily task list visible on two different chalkboards, at the front and on the side of the room. Ms. Stevenson thoroughly explains each task, the necessary resources, and what is the expected outcome. She provides additional visual aids on the board, shows a model of one of the more difficult tasks, reassures them that they can do it, and checks for understanding by asking questions. "You're doing good Ms. Stevenson," comments one student while looking at Ms. Stevenson's completed model of a snowflake (one of the tasks). All of the students know what they are expected to complete over the next two hours and what to do with each finished task (put in folder,

leave on desk, bring to her, etc.). Extra copies of the worksheets are provided in a designated place if students need to start over.

For the project manager:

The task list does not include milestones and goals, but rather the daily steps you are taking toward achieving those objectives. Writing down these tasks will keep you focused and motivated.

You can set up your team for success as well. Do they know what tasks you expect them to complete? In *Time Management*, by Katie Jones, she states that most people do not complete tasks or procrastinate due to one of the following: unfamiliarity with the task, complicated tasks, preference to socialize, concentration and self-discipline, prospect of conflict, wanting to stay in comfort zone, and fear of making mistakes. As project manager, have you prepared your team members to complete their tasks? Consider how you communicate the tasks and responsibilities, provide resources, accept feedback, and share how everyone's tasks contribute to the completion of the project. These may seem basic; however, if your team is missing deadlines perhaps you need to step back and evaluate if you are setting them up to succeed or to fail.

Prioritize based on urgency, importance, and difficulty

The majority of students began their work with what they thought was going to be the hardest or the most time consuming task. One student comments, "I want to do this first so I don't have to worry about it." Another student says, "I want to do this first because it is the hardest. I am going to do the word search last." Why? The student explains, "Ms. Stevenson lets us work with a partner on the rug if we want. I'm going to save that for last to do with my friend."

The task list includes:

1. Cut out two snowflakes using two different patterns
2. Word search
3. Subtract shapes math worksheet
4. Enlarge picture
5. Journal entry (three sentences)
6. Unscramble words

Seven students go to the carpet to work on the word search. Six remain at their desks and begin the snowflakes. One student starts the subtract shapes worksheet because, "it doesn't look fun at all." While it is interesting to see the group dynamics initially, once the individuals complete the first task, they vary in what task they choose to work on next.

Ms. Stevenson allows them the freedom to choose what to work on. Besides giving the students a sense of control, this may help lower frustration levels if a student can decide to put down a difficult task, take a break with an easier exercise, and then come back to it. Ms. Stevenson is giving the students the power to make their own decisions and control over the what, when, where, and how of their work environment.

For the project manager:

“Do the unpleasant tasks first. When you have done these, you will be in a positive frame of mind and more motivated to complete the other tasks.” Jones further explains that having difficult tasks hanging over your head causes anxiety and stress.

How can you apply this concept to your project team? It is not your job to prioritize everyone’s task list. Each member of the team knows what they have to do and besides, what may seem difficult and unpleasant to you, may be the opposite for your co-worker. You have to trust your team members to prioritize accordingly. If you micromanage, your team’s productivity and morale will suffer.

Persist until natural rewards follow

The students work diligently and exhibit teamwork, positive reinforcement, self-confidence, and control. Throughout the time, students frequently check on the status of each other and share their own progress. The students look to each other for assistance and offer tips based on their experience with a task. The teacher is available for support, encouragement, and assistance. As they complete their tasks, the students are rewarded with time to play the computer, read a book, work on a puzzle, etc. Toward the end of the two hours, those that are finished encourage and cheer on those that are still working. The atmosphere is positive and inspiring.

The 14 students—diverse in culture, demographics, personality, and academic ability—have successfully completed all of their work within the two hours. They display pride in their work and pride in themselves.

In disbelief you may think that there has to be at least one student who struggles to finish. On the contrary, Ms. Stevenson has trained all of the students to manage their time wisely. The students know that if they don’t budget their time and complete their work that they will have to work during their free time before lunch.

For the project manager:

What is going to help you persist and persevere? Your task list is comprised of the smaller objectives that help you reach your goals. By stating your tasks daily and achieving them, you are able to see your progress toward accomplishing your goals, which is both motivating and rewarding. In addition to this, build in some tangible rewards as you accomplish your goals. What work-related incentive can you offer yourself, as well as your team members?

According to a recent poll on www.pmboulevard.com, project managers of software processes keep their creative, highly intellectual team members motivated and working well together through various means: compensating fairly and creatively (38%), ensuring the opportunity for training (34%), minimizing overtime (14%), and providing senior level information (13%). Try a few incentives and ask for feedback.

Can your team members see you budgeting time and meeting deadlines? In helping your team to persist and reap rewards, consider the following questions:

- Do you allow freedom to “work on the carpet” when they want? Maybe for your project this means allowing flextime or telecommuting.
- How do your team members work together? Is there an atmosphere of support?
- Do you offer encouragement and assistance without micromanaging?
- Are the incentives relative, proportionate, and appreciated? Ensure that the team members value the rewards being offered.

After watching these students plough through their work, happily moving from one task to the next, it was easy to feel inspired. The future employers (not to mention future teachers) of these first graders will benefit from their ability to organize, prioritize, and produce work efficiently and effectively.

Ultimately, those students can attribute their success in the classroom to their exceptional teacher. She is fostering a life skill that will help them throughout their lives. Whether you are six or 60, it is not too late to apply these same strategies to your daily life. Once you are in the habit of applying time management strategies—creating a task list, prioritizing, and persisting—you can set a good example for your project team to follow. The result will be more efficient workers with self-confidence and pride in their work and in their project.

*Special thank you to Mimi Stevenson at Stoddert Elementary School in Washington, DC, her student teacher Ilene Fink, and her wonderful students: Alex, Amber, Barclay, Conrad, Danny, Douglas, Erin, Hannah, Harrison, Julia, Morgan, Nina, Ragib, and Tina.

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Career Planning

Career Planning as Part of the Project

Alan Gartner

Treat the project as one step in your career plan

When you are assigned a new project, you naturally assume that if the project is successful, your career will benefit. To make this come true, you, as project manager, must treat the project as one step in your overall career plan.

Project managers are not usually selected just to be promoted. Project managers are assigned projects to benefit the company or the assigning manager. You may have been selected for your ability to buffer a conflict in the organization, to take the blame for failure, or to silence critics of a company policy. Often project managers are selected to assuage customers who are skeptical about the organization's ability to perform. Any of these situations can either hurt or help your career.

To provide a good example of such an assignment, I was recruited by a large systems integrator to lead a multi-million dollar software development project. The company had sold a system that was larger than any project they had ever tackled and their previous large projects lost large amounts of money. The company was looking for an owner and needed someone to bring in the project both on time and within budget or to blame for failure. If the problems that had caused the previous overruns had been fixed, this would have been a "career enhancing opportunity."

My first priority became to manage the company culture. Fostering cooperation and accountability became keys to success of the project. Success of the project required shuttle diplomacy, careful internal negotiations, and delicate handling of management. All parties had to come to the table before the project could proceed. At one critical juncture, I had to allow one of the organizations to fail so that its internal managers would address the failures. The skills I developed ultimately supported all of my following subsequent career moves.

The project ultimately was very successful in spite of overruns. It made more money than the company had ever made and met the customer's requirements, which in turn enabled the company to sell more after the initial purchase.

This anecdote illustrates two strategies for project managers as they start a new project:

1. Understand why management chose you to lead the project. Most often, the unstated reasons are the most important.
2. Understand what your personal goals are so that you can enhance your career with the project.

Determining the goals of management

The first strategy (accommodating management's goals) allows you to understand what management will do to achieve success. If they want the project to succeed, they will devote resources to it. If they just want you to keep the project from failing, then you have to determine how to avoid interfering with other strategic goals of management. Sometimes your project will conflict with corporate strategies, because it pulls resources from other projects. Understanding how management wants to deal with these issues is important to meeting management's goals. You as project manager will be held responsible for making sure the project succeeds.

Another part of this strategy is to understand the personal goals of managers who assign people to the project. While you may not get anyone to say he wants to see you fail, it is important to recognize that he or she only cares about your success if it affects his or her definition of success. Therefore, you need to identify the hidden agendas of the people who are critical to the project. This is an issue of reading the personalities of the line managers.

For example, when you ask for resources from a line manager, you need to understand his own goals and personality. Risk takers need to see reward. Risk avoiders need to see comfort. You have to present your project's needs in terms these people can understand personally.

As part of the project plan, you need alternate ways to get things done when you cannot fulfill the line manager's needs. A strategy that relies on running to management every time someone is late is a career-limiting strategy. While it is true that the "squeaky wheel gets fixed," it is also true that it is first to be replaced. So, be very careful about when and how you escalate problems. If you are asking for management intervention more than once a quarter, that is too often. Avoid these problems by planning your project around the line manager's abilities to respond.

Determining your personal goals

The second strategy is to plan your career and make sure the project goals and the career goals are compatible. This requires an assessment of those goals and steering the project so it enhances your goals.

A realistic assessment of your own career goals can help you pair your needs with the project's goals. Define the skill sets and personality traits for the next position or project you want to manage. Whether your career goals are to manage a larger project or to exit

project management, you have to show management the right combination of drive, skills, and direction on this project before you will gain that opportunity. If you want to exit the project before it is completed, you need to train your replacement first. You should have a realistic assessment of your goals as they relate to the project.

Another part of this career plan is to make a realistic schedule for your career. You need to identify what skills and opportunities you need for your next position. The best approach to this process is to clearly define your next position. Generally, one would look forward to the next position after the project completes, but some projects, like the Hubble telescope, outlast the careers of people who worked on them. So, do not let the project's horizon become your own.

Write down a realistic description of the next position you want. The description should include the type of work you want, the relationships with other people, the technical skills required, the education required, and the compensation for that position. Even if retirement is your next position, you want to know what you will do with your time and talents. You need to understand the day-to-day workings of such a position before you can finish your description. You need to know both the positive and the negative aspects of your next position.

A good way to build this description is with the help of a mentor, preferably someone outside of the organization who has had a similar position. The mentor can help you develop a realistic assessment of what your capabilities are and how to apply them to your next position. Choose your mentor carefully.

With your mentor, compare your own skills to that model of the next position. If you have deficits, figure out how you can fix those deficits. For example, if you lack accounting skills sufficient to take the position of engineering manager, then you now have some goals to build your accounting skills. These goals are not for public view, but are to guide you in how you handle your project. As you accomplish these goals, they will become obvious; however, do not wave them in the face of your peers and management.

Evaluating project and personal goals

You have to compare and contrast all of your personal goals with the goals of your project. The project strategy has already built a set of goals and strategies for the project. You should have two sets of goals—the company's goals and your goals. By carefully comparing them, you can determine where you will have to focus effort and where success will become automatic.

At the risk of saying the obvious, it is important that you focus on the conflicting goals, not the ones where the project goals and your career goals coincide. When you learned spelling words, you did not practice the words you know, the unknown required effort. So, develop plans to work with those conflicts and overcome them.

Finally, take the time to build relationships. While project managers are generally driving people, that does not mean that you have to walk on the backs of other people.

Real success comes when you help team members achieve their goals. A little time spent talking to line managers can help both succeed as project manager and advance your career. Do not underestimate the value of having a friend suggest your name in some meeting when the question comes up, “Who can we assign to this new position?”

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Project Politics

Getting Team Buy-in of Project Processes

Kathleen A. Demery, PMP

Procedures not being followed? Tips to obtain buy-in

OK. You are managing a project. You made sure the project development processes were defined and documented. You thought the word got out. Everyone is supposed to use the documented processes. What happened? Why aren't your team members following the processes and using the required templates and forms to do their job? For example, the new progress reporting procedure is not being followed, the progress reporting templates are not being completed accurately, and you are not receiving them by the due date stated in the procedure. What is going on?

It seems like a classic case of not getting “buy-in” from your project team. Oh, you made sure during the kickoff meeting that senior management showed their support to the project, its scope, resource assignments, and project plan. However, did they endorse the processes and procedures? Did they say a few words about how important it is for each team member to follow them? Was an announcement made about the scheduled training session for the new and updated processes? Were process audits planned and communicated to the project team?

Here are a few tips that you can use to obtain project team buy-in of the project processes.

Tip 1: Obtain senior project management support

Support of senior management is a prerequisite for the success of the development, implementation, and institutionalization of the processes. When introducing the project to the project team, the appropriate senior executive should announce any new or updated processes and expectations of process compliance. This display of commitment increases the visibility of the processes and validates their importance to the project.

If this was not done during project kickoff, invite senior management to address the issue at the next project team meeting (or call a special one). Alternatively, try drafting a memo for senior management to send to the team.

Regardless of when senior management announced its support for the processes, they can continue to show visible support during project briefings, asking for the results of using the processes, and if issues were identified, how they were resolved.

Tip 2: Communicate expectations

Project managers should demonstrate commitment and enthusiasm for the processes. Make sure that expectations are crystal clear. Provide the rationale. Explain how following the specific process will help them do their work, provide consistency, save time, save money, improve quality, contribute to the project objectives, etc.

Ensure each team member clearly understands:

- their role in the process;
- their responsibility;
- their authority;
- the interdependencies and how their piece fits in;
- management expectations; and
- the way their performance will be evaluated.

Tip 3: Involve the project team in implementing the process

Ask a small group to participate in a test of a new or updated process before moving it out to the entire team. This test or pilot group can check for completeness, accuracy, and usability. It can also ensure that it brings value to the project. The comments and suggestions from the pilot group can be incorporated into the process before deployment to the entire team. You might discover glitches in the process flow itself, the use of unclear terminology, or even poor wording that was misinterpreted. Knowing that other team members previously tested the process will increase confidence in its use. Additionally, those in the pilot group will feel ownership of the process and become process advocates.

If you did not have an opportunity to pilot the process before it was deployed to the team, remember that processes can always be improved upon. Provide a mechanism by which the team members can make suggestions for improvement, either during the project or at the time of project closeout.

Tip 4: Provide Training

Before a process can be practiced, it needs to be trained. It can be a formal training class or an informal process orientation. It is best to conduct the sessions at the beginning of the project, but it is also effective at any time during the project. Follow-up coaching and mentoring can be used throughout the project to ensure the correct usage of forms and templates, for example. During these sessions, you can also identify where team members might be having problems and make sure those items get on the list as areas for improvement.

Tip 5: Ensure process compliance

To be effective, processes need to be enforced, measured, and reviewed for effectiveness. Process audits should be included in the project's quality assurance plan. The audits can be done by your quality assurance organization or by your own project team. In either case, an audit can be done based on criteria from an audit checklist. The project team should be involved in the development of this checklist. There should be no surprises.

The quality assurance group can audit for process compliance based on the checklist or your project team can review each other's process compliance based on the checklist. Peer reviews can encourage healthy competition that can challenge and motivate the project team to utilize the process.

Processes should be measured so you know whether they are effective. Process compliance (conformity to the standard) should be tracked and reported to management. However, process compliance does not guarantee project success. Processes need to be tailored for the project, and reviewed for value and the capability they bring to the project.

Tip 6: Reward for performance

Give credit privately and publicly for positive contributions to process improvement as well as process compliance. Rewards can range from monetary (e.g., bonuses) to positive feedback or team recognition. For those still not on board, you may have to escalate the non-compliance issue to the next highest authority.

Summary

Teams will utilize project processes if senior management and the project manager are on board and visibly show their commitment; ensure that the processes are well documented, tested, communicated, and monitored for areas of improvement; and provide that the project team is sufficiently trained, clearly understands their role and responsibilities, and are audited and rewarded for process compliance. Motivating and encouraging your project team to follow project processes can have a significant positive impact on the success of your project.

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Online Tools Using Project Management Portals to Integrate and Share Project Information

Dan Patterson Ph.D., PMP

Technology has evolved to enable effective online communication

Project management software has evolved steadily over the past 20 years with applications growing from stand-alone “person-to-data” systems to today’s Web-based “people-to-people” systems.

The evolution of project management portals

Increasingly, projects are constrained by shorter lifecycles and budget; organizations are forced to operate in geographically dispersed environments, often with many separate groups involved in projects. The number of different means of information generation and retrieval has also expanded to include technologies such as scheduling tools, e-mail, fax, and electronic documents.

Portal software is not a new concept. When portals first emerged in the mid-1990s, they were used to consolidate corporate Web sites. Since 1998, they have grown rapidly in user acceptance as a way to improve communications and collaboration across the enterprise, particularly in project management.

Historically, project management portals have been developed in an ad-hoc fashion, but today there are toolsets and underlying technologies available that provide a more structured and reliable approach to developing such information gateways.

Project management portals today

In their 2000 research examining distributed project management and the challenges and needs faced by geographically distributed project teams, the San Francisco-based industry analyst and advisory firm Collaborative Strategies, LLC reported that Web-enabled project management software market revenues were expected to increase from \$700 million in 2000 to nearly \$1.5 billion by 2003. Their report update, “Distributed Project Management: Update 2001,” stated that those revenues were expected to reach \$1 billion in 2002 alone with a strong trend toward peer-to-peer (P2P) or hybrid (client-server/P2P) architectures. According to the report, projects are shifting from planning to doing and executing, and there is a movement away from complex, desktop-based systems to easy-to-use browser-based systems. In addition, more and more projects are becoming complex in nature, requiring geographically dispersed teams.

As more project management responsibility is delegated to non-project management personnel, the audience for project management tools is growing. In light of this, what is still lacking in many projects is an easy means of providing information to various project participants in an easy-to-use, timely manner while still providing the necessary control for secure access.

With widely dispersed teams, one of the most common causes of project failure is the inability to share or distribute project information in a timely manner. Only too common is the scenario whereby the project planner spends hours creating a detailed schedule that very few team members ever get to see or use. Time is spent collecting progress reports, updating the schedule to report to senior management and stakeholders, and disseminating the information. Oftentimes, by the time it is completed, it is already out of date.

A threefold need develops. People doing the work need a fast and simple means to submit progress updates. The owner of the project needs a means to analyze progress and quickly publish project updates and reports. The recipients of that information need an easy means to access the information in a way that is meaningful to them.

The project portal, integrated with scheduling applications, provides a powerful solution to these needs. Through a common interface, team members can submit progress in a timely manner (accessible from anywhere that has Internet access), project managers can rapidly verify progress and update schedules, and all project participants can access the very latest status information in a controlled environment.

In addition to schedule-based information, project portals are typically used for collaboration on projects, sharing of documents, and management of issues. In fact, it is becoming increasingly common for projects to be managed primarily through the tracking of issues and action items, sometimes even in the absence of a schedule.

Centralizing all project information through a portal makes it easy and efficient to publish, edit, and approve documents, to manage and track items (such as issues, risks, action items), to share news and ideas, and to generate a cohesive team approach to implementing projects. Such centralization is a common need in a project management office.

Project Web sites are also created and managed within the project portal so that information is easily located and all participants can quickly stay informed of any changes, updates, and news. Sophisticated portals also offer cross-project perspectives so that senior managers can get a global view of projects, and team members working on multiple projects can easily keep track of all their responsibilities.

The key to a successful project management portal is not just providing a common interface to different types of information, but also providing more specific, relevant information to the varied types of project participants and integrating diverse types of information together. For example, an issue tracker in a project portal should be able to link issues back to the underlying schedule of the project.

Essential characteristics of a project management portal

The research group Giga defines four key project management portal requirements:

- Project access and information integration - gathering and distributing information in a timely manner.
- Project team collaboration - providing a means for project stakeholders to communicate and share information.
- Project support tools integration - integration of both data and systems within a project.
- Information delivery - providing best practice content.

In order for a project management portal to be useful, it also needs to include several important characteristics: ease of use, open architecture, customizable interface, and controlled access.

Ease of use

From the team member to the project manager to the project stakeholder, all users need to find it easy to access and use. When accessing a portal, a user should be able to pinpoint the relevant information intuitively whether it is in the context of a portfolio, project, or even individual task assignments. Modeling the structure of such entities, as realistically as possible ensures user acceptance and subsequently a greater chance of project success.

Information flow is key. E-mail notification of an uploaded document to relevant team members can greatly reduce the lag time and effort required to ensure that a document has been distributed. Simple indicators that highlight new items also help to save time and make a portal easier to use.

One of the many benefits of a project portal is the exposure of project information to non-project managers. Often, this can reduce the project manager's burden of responsibility for all project management-related tasks and, instead, ease the task of delegating some project responsibilities to the team member.

Open architecture and application program interface (API)

In order to achieve integration with a wide variety of systems, the portal needs to have an open architecture that can easily be understood and exposed. In order for portlets to be embedded within portals, there needs to be a rich API through which the portlet can communicate.

Customizable interface

Corporate branding is an important requirement of a project portal. A portal needs to have the look and feel consistent with the sponsoring or parent company/site. Since many different types of users access the portal, the user interface must be adaptive so

that it is relevant to the user's role. For example, a team member should not be exposed to navigation items that are relevant to only a system administrator. Portals are also used to launch or link to other portals or intranet sites. Thus, the ability to customize and to adapt the navigation to specific project and user needs are important functions.

Controlled access

Portals, while providing easier access to project information, need to do so in a controlled manner. Providing sufficient security is as important as providing the information itself. Security can be described at different levels: underlying technology, application level, and role level.

Technologies such as Secure Socket Layer (SSL) and other encryption technologies have made the passing of sensitive information over the Internet more acceptable. On top of this layer, there typically resides an application layer of security, i.e., the security within the application that controls access to the portal. Application security, while needing to be secure, also needs the ability to integrate with other security systems such as Lightweight Directory Access Protocol or Active Directory. Such technologies allow the sharing of user lists that can reduce the cost of administrating the users of the portal.

Once validated within the portal, a user should inherit a role and even be able to adopt different roles within different projects. A balance needs to be struck between providing the user with enough flexibility to ensure access to information and retaining sufficient control over that information. Security needs to be flexible enough to control both the information the user can access and the rights he or she has to that data. Cost of security management and aspects such as grouping of users and assignment of roles at the group level should also be considered.

Benefits of implementing a project management portal

There are many reasons to consider implementing a project management portal. One of the best ways to evaluate a portal solution is to look at the overall benefits of the portal to each department and user group within an organization.

Project managers

- Centralize management and control of projects
- Access real-time reports for easier analysis
- Identify potential delays more easily, allowing corrective action to be taken in a timely manner
- Share information and communicate with distributed teams
- Approve progress from team members and update schedule quickly and easily
- Achieve greater project visibility with team and stakeholders
- Build communities around projects and pool expertise

Project teams

- Enter progress updates through the portal, speeding up the replanning process
- View real-time reports of work to be performed and live project activities, helping to improve efficiency
- Access project information from disparate sources
- Improve team performance through greater collaboration and communication
- Enable “work anywhere” structures

Executives & stakeholders

- Access real-time reports and high-level dashboard indicators
- Monitor project health and status
- Reduce project costs and improve time to market due to improved efficiency
- Lower cost of ownership and reduce training needs
- Improve knowledge management and project repeatability

Suppliers/partners/customers

- Access real-time status reports remotely
- Share information

Case study: SanDisk

SanDisk, the world’s largest supplier of flash data storage products, such as memory cards for cameras and portable devices, chose a portal for its project collaboration needs. The company uses a project portal, allowing its executives, project managers, and project teams to view and use project information throughout the company. Currently, SanDisk users in the United States, Israel, Japan, and European countries are collecting, sharing, and viewing information related to 50 projects. The projects include IT and enterprise-wide operations.

Since their project teams crossed over a number of organizations, SanDisk placed project visibility and communication of project status high on their list of objectives. “We were looking for a Web portal where team members could store all of their information, share documents, collaborate, and view red-yellow-green light indicators on project status,” explained SanDisk Web Quality Analyst, Jennifer Middlekauff. “We also needed a tool that could integrate with Microsoft Project[®] or be used as a stand-alone [application] without a scheduling tool.” SanDisk also uses the portal as a communication tool for project status meetings. Because it is Web-based, team members have real-time information regardless of their geographic location.

The future

What is the state of the portal for the future? A survey of more than 200 clients at the METAmorphosis PLUS! 2002 Conference and Technology Showcase indicated that portals are steadily being adopted into large organizations, extending into portals that include external involvement of partners and clients.

During the next five years, effective collaboration between distributed project participants will become increasingly mission-critical. With the advent of highly functional, feature rich, integrated project portals, managing this collaboration is now becoming a reality. Portals continue to establish themselves as tools through which projects can be brought to successful completion.

Conclusion

While the need for project management portals is not a new concept, recent advances in both technology and project management methodologies have advanced the use of portals. Many companies have seen the benefits of a project portal, enabling them to optimize project delivery across their enterprises. Portals have allowed them to effectively plan and manage business-critical projects, delivering the right information to the right people at the right time for maximum collaboration and control.

With such an immense and measurable impact on projects, portals will undoubtedly continue to play a major role for organizations worldwide in the years to come, transforming business and moving work to the Web. Additionally, only those portal solutions that offer strong collaboration together with a high degree of integration with the project schedule will remain commonplace in the working environment.

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Mentoring

Project Manager as Mentor and Coach

Steven W. Flannes, Ph.D., and Ginger Levin, DPA

The roles of mentoring and coaching in all areas of the workplace

The roles of mentoring and coaching are becoming more important in all areas of the workplace, not just project management (American Society for Training and Development, 1995). Mentoring and coaching can be defined as those processes by which one person (the mentor or coach) assists another person, either formally or informally, in various tasks related to the general purposes of professional growth and development. This assistance often takes the form of guidance and encouragement and may or may not be directly tied to an actual project issue being faced by the individual being assisted. Indeed, coaching and mentoring often become directed at assisting the individual in attaining a broader view of future career direction or advancement.

Some companies are reducing the staff of internal training departments, so employee development functions are shifting to department leaders or project managers. Today's technical employee, working with a robust economy, expects that "added-value" benefits, such as coaching and mentoring, will be available within the workplace.

Mentoring and coaching actions and behaviors may include any or all of the following, depending on the needs of individual team members and the challenges of the project:

- Being a role model, by which the project leader demonstrates desired skills, behavior, and attitudes whose adoption may benefit team members.
- Demonstrating a genuine, personal interest in the welfare and professional growth of team members.
- Offering suggestions, possibilities, resources, problem solving approaches, and opportunities to "think out loud" with team members regarding current or future issues.
- Providing feedback that is supportive yet frank and accurate, which tends to reinforce successes while portraying failures as learning opportunities.
- Offering motivation directed toward assisting team members in identifying and achieving long-term professional goals.

During the more intense periods of a project, most interactions between the project manager and team member are directed toward real-time issues or current problems. A coaching or mentoring emphasis regarding those issues or problems often arises after the "dust has settled," and the acute issue has been resolved. These are the times when the project manager and team member debrief each other, and the manager finds it

appropriate to offer formal or informal guidance about how the team member could approach the same problem differently in the future. Sometimes a team member requests such feedback. Other times, he or she will not openly request feedback but may still be receptive when it is offered.

Mentoring and coaching are often not formal duties listed in the job description of the project manager and, as a consequence, the project manager needs to offer such “services” cautiously. Not everyone on the team is open to such services, and some members of the team may actually have more project experience than the project manager and could be performing the mentoring themselves.

A coaching and mentoring relationship is often best suited to a project manager and a person on another project team. Such a relationship often frees both parties to focus more clearly on the developmental needs of the coachee, free of distractions that can occur when both parties are working on the same team. Many organizations that sponsor internal coaching and mentoring programs stipulate that a mentoring relationship should be between professionals who do not work with each other.

The tone of a mentoring relationship is something that should be presented with caution. For example, professionals react differently to a coach whose tone is parental in nature. Some find such a tone calming and reassuring; others would find such a mentor irritating and insulting. Some people prefer a mentor whose tone is like a “big sister,” but others are angered if their mentor adopts such posture. Still others want a mentor whose tone suggests that the mentor and mentee are two equals drawn together by the goal of solving specific problems. This tone suggests two people with equal abilities and experience who may be “thinking out loud,” and both capable of leading the process of crafting the solution.

The prospective mentor, when considering the request for initiation of a mentoring relationship, should consider and discuss the styles of the people involved. What style does the mentor want to offer? Is that a style the mentee feels will be effective? It is important to discuss these style questions before the parties agree to a mentoring relationship. Like any courtship, this discussion needs to examine honestly what each party wants for the relationship and what each party is capable of giving.

Formal coaching and mentoring programs are increasingly popular (Hendricks, 1996), partly because of reported benefits of the arrangement. The coaches often describe the relationship as a positive one where they can talk in confidence with a professional outside of their project team on matters of professional growth and development. Coaches report positive feelings about the opportunity to give something back to the profession in terms of assisting a junior colleague to move along the career path.

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Team Building

Working with other Team Members

Don Clark

Understand personal styles: driver, persuader, analyzer and organizer

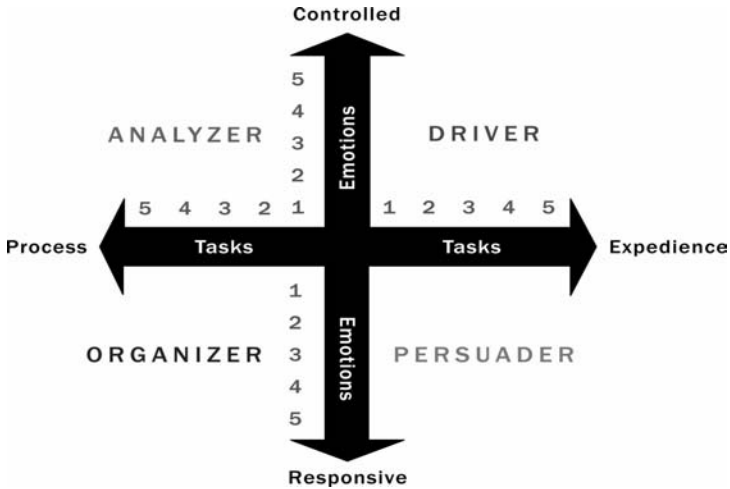
Although we are alike in many ways, we are not alike in many more ways. Humans have always tried to classify things, including themselves. This section uses a popular categorizer by placing people into four styles - driver, persuader, analyzer, organizer. (Note that the names will vary widely depending upon the creator of the chart.) The styles are charted on two dimensions - tasks and emotions. People get results on tasks between two extremes: expedience and processes. People use emotions to deal with others through two extremes: controlled or responsive. In the chart below, the two dimensions are shown in italics under the profile column.

Profile	Style	Key (focus)	Potential Strengths	Potential Weaknesses
A take-charge person, exerts strong influence to get things done, focuses on results. <i>Emotions are controlled and one gets results through expedience.</i>	Driver or Controller	Results and accomplishments (get it done)	Gets things done. Determined, thorough, decisive, efficient, direct.	Inattentive behavior when listening to others. Dominating, unsympathetic, demanding, critical, impatient.
A social specialist, expresses opinions and emotions easily, prefers strong interaction with people. <i>Emotions are responsive and one gets results through expedience.</i>	Persuader or Enthusiast	Involvement and enthusiasm (positive ideas and responses)	Involves and works with others. Personable, stimulating, enthusiastic, innovative.	Hard time following systems or processes. Opinionated, unpredictable, reactionary.
Likes to be well organized and thought out; prefers specific projects and activities; enjoys putting structure to ideas. <i>Emotions are controlled and one gets results through processes.</i>	Analyzer or Theorist	Precision and accuracy (actions will be documented)	Great at organizing. Industrious, persistent, serious, orderly, methodical.	Can have trouble when action needs to be taken immediately. Indecisive, uncommunicative, critical.
Adaptive specialist, high concern for good relationships, seeks stability and predictability, wants to be part of larger picture. Emotions are responsive and one gets results through processes.	Organizer or Affiliator	Relationships and stability (loyal)	Builds relationships. Cooperative, supportive, dependable, helpful.	Does not want to change. Conforming, uncommitted, hides true feelings.

Notice that the two dimensions, results and emotions, are closely related to Blake and Mouton's Managerial Grid, which uses people and tasks as their grid. That is, we use emotions when dealing with people and our approach to tasks uses some sort of a result orientation approach. When Blake and Mouton came out with a tool that used only two dimensions or axis, it struck a cord with its simplicity.

There are various degrees along the two dimensions (emotions and tasks). Each experience that we have will call for varying degrees of emotions and approaches to task results.

The result (how we accomplish tasks) and emotions (how we deal with people and experiences) dimensions can be charted as:



Three main flaws must be taken into consideration when using a tool of this nature:

- Everyone uses all four styles depending upon the situation; however, the chart can be a useful tool for understanding different viewpoints. It is based on the theory that each person tends to have one or two dominant styles.
- The very simplicity that makes a tool like this so popular, cannot accurately predict the complexity of human nature. However, it can help us get a handle on the various approaches taken by individuals.
- People try to pigeonhole the four styles of people into certain categories. For example, managers are drivers, human resource personnel are persuaders, programmers are analyzers, etc. This is simply untrue. Where I once worked, our human resource contact was a driver, our manager was a persuader, one of the employees on the bottom of the rung was a driver, and one of our best technical persons was an organizer. However, most of the employees (workers in a manufacturing plant) were organizers, analyzers, or a combination of the two.

The goal of using such a tool in a team setting is to realize that people look upon things with a different viewpoint than you. For example, the reason someone will not hurry to complete a task is not because they are slow, it might be because they are viewing it from a process standpoint and want to ensure that they get it absolutely right (analyzer). In addition, it takes all types to form an effective team. Without drivers a team will get nothing done, without persuaders a team will fail to get all involved, without organizers

a team will not gel together, without analyzers a team will miss key steps. The four styles form a complete community, and it takes a community to grow a team.

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Inspiration

Aesop Inspires Effective PMO Implementation

Darren Jerome, PMP

Reflections on messages relevant to an effective PMO

Inspiration often occurs unexpectedly. Most recently, it came in the guise of a book of Aesop's fables that I purchased for my daughters' bedtime reading. In flipping through the pages, I was continually impressed by the brevity and insight of the author, a slave who lived on the Greek island of Samos in the sixth century BC. While most of us are familiar with Aesop's more famous stories such as the "Tortoise and the Hare" or "The Grasshopper and the Ant," one particular parable resonated above all the others; it was entitled "The North Wind and the Sun."

The North Wind and the Sun – Aesop

The North Wind and the Sun had an argument over who was the most powerful. They agreed to settle their disagreement by a contest: whoever could take the coat off a traveler would be declared the winner.

The North Wind tried first. He blew and blew and blew with all his might, but the harder he blew, the closer the traveler wrapped his coat around him. At last the North Wind gave up.

Then the Sun had a try. He shone out in all his warmth. The traveler, feeling the warmth of his rays, began to take off one garment after another. At last, almost overcome by the heat, he took off his clothing and bathed in a stream by the roadside.

Long after the girls had fallen asleep, I found myself still reflecting on the story and discovering a couple of messages relevant to the establishment of an effective project management office (PMO): the PMO as the sun versus the wind and invest in the sun or inherit the wind.

Theme 1: The PMO as Sun vs. Wind

Arguably, a PMO starts off being perceived by many as part of the problem versus part of the solution. In order for it to be embraced as a value-added entity, it must go

beyond the mechanics of simply “forcing down” standards and “driving up” metrics. To that end, Aesop’s parable provides some keen insights:

- Understand your customers. A PMO needs first to recognize that its customer base encompasses everyone it touches, from project managers to senior management. Assuming this realization is made, the next step is to determine the specific needs of each stakeholder. In Aesop’s fable, the North Wind looked to achieve only its own ends and lost the contest as a result.
- Seek to establish a symbiotic relationship with each stakeholder. In the parable, the Sun understood that his ends could be achieved by creating a desire on the part of the stakeholder to perform in the intended manner. In the same way, a PMO can effectively win over its customers if it has a bias toward addressing their individual requirements as well as its own.
- Don’t expect immediate recognition. Just as the Sun was patient with regard to achieving results, a PMO must be prepared to win over the organization through little victories, and share the credit for positive results with the managers it supports.

Theme 2: Invest in the Sun or Inherit the Wind

“Inherit the Wind,” is the title of a well-known play/movie based on the Scopes “monkey trial” and provides a segue into a discussion on the importance of treating a PMO as a serious investment. The title is based on Proverbs 11:29: “He that troubleth his own house shall inherit the wind.” In other words, an organization stands to lose more than just its PMO if it does not make the investment to set it up correctly.

Successful implementation can only be achieved through the diligence and expertise of the PMO members and their ability to establish solutions that not only add value but are seen to be adding value. Success is not realized through the procurement of a few licenses for project management software and some generic processes pulled from the Web. (This is not to suggest that tool and process enablers are not an integral part of the solution, but they are by no means the entire answer.) Investment is required for the

PMO to become the source of energy for the organization that embodies the following characteristics:

- **Hard skills:** The PMO must act as a solution architect in order to establish, integrate, leverage appropriate techniques and technologies, and effectively manage the collection, analysis, and dissemination of information to project stakeholders. A comprehensive skill set is required since this information can take many forms; from requirements and scope definitions to cost/schedule status and trends, resource metrics, risks, and issues. The resulting benefits realized through the judicious and effective introduction of structured, efficient, and process-driven information flows are numerous and include universal confidence in the plan and the ability to make informed decisions in a timely manner.
- **Soft skills:** The PMO must warm the organization to a new way of doing things. Fifty years ago, a psychologist named Kurt Lewin construed that an initial “warming period” (he referred to it as “unfreezing”) was the first step in an effective organizational change strategy. Lewin contended that the benefits associated with a change must be articulated and demonstrated before buy-in could be achieved. Stakeholders have a tendency to hold their coats tight to their chests when confronted by the winds of change. The introduction of a PMO within the organization requires extensive soft skills such as coaching/mentoring, ongoing communication, listening, and positive recognition for managers who are the early adopters.
- **Bandwidth:** To be effective, the PMO must continually meet the information requirements of its stakeholders. This requires a critical mass of professionals who can consistently address predictable, process-driven information requirements as well as respond to the constant barrage of ad hoc requests from project staff and senior management. Conversely, an understaffed, unresponsive PMO can bog down and potentially undermine the projects it is intended to support—especially if information upon which managers become reliant is not provided in a timely, accurate, and consistent form. To remain valid, the PMO must be lighting the fires; not fighting them.

Although this clever parable originated in a very distant time and place, organizations that may be “blowing it” when it comes to implementing their PMOs might truly benefit from its wisdom.

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