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DELIVERY - PROJECT BY PROJECT

The art of progress is to preserve order amid change and to preserve change amid order.

Alfred North Whitehead

From a “grassroots” view, as we sight along the line where daily business is conducted, we can understand the importance for communication of upcoming change. We need to ready the organization for change. We must have an effective way to implement change, and we must support change. Hence the basic *Announce, Train, Implement, and Support* model. This helps us to preserve order amid change.

We can also see the importance for understanding and emplacing the general structures for near-term, longer-term, and individual plan planning in support of change – the One-Year, Five-Year, and Individual Action Plans, respectively. In this regard, we’re preserving change amid order – in other words, we don’t allow ourselves to become complacent and “rusty.” Things are less likely to catch us off guard. We find that readiness keeps our “change muscles” toned – we don’t allow ourselves to atrophy. This is necessary because, with or without our engagement, change is a continuum. Events, requirements, and motivators are streaming into our face.

Conversely, when we ‘preserve change amid order,’ we’re not really talking about conducting or experiencing large change at each moment in time – that would be a pretty good definition of chaos. But we’re staying cognizant of, and ready for, all of the necessary changes that the organization will have to undertake as it identifies, schedules and plans to undertake them within the world at large. Being cognizant and ready is a way of ‘preserving’ change. Being ready means that we can position any change to the organization’s best advantage. Whether suiting the organization’s larger schedule, its fiscal burdens, its availability of resources, or workloads of individuals, the optimal change has at its disposal the “ready organization.”

There will be increasing peril to the delayed, too-far spaced, and expensive lurches into the future that are characteristic in too many environments. Delays, whether due to fear, ignorance, lack of will...or just general procrastination, are increasingly dangerous. Since the future won't stop its sponsored change, we recognize that change is ongoing, comprehensive, and accelerative in nature. It must be handled for accurate delivery on properly sized, business case, needs – all the while preserving order. And so we come to “the project.”

It may seem that we've put the cart before the horse here - all of this change qualification and management – with no germinating change in the first place. However, carefully evaluate your own feeling, and your organization's stance: If it seems this conversation's order is reversed, it is likely because your organization has an overly *reactive* philosophy regarding change. Certainly there will be times when you must react to things, but to serve the future effectively you must create, lead and control your change to be highest degree possible. You must be *ahead* of change – even when it is driven by outside influencers. In order to lead change you must have some measure of the disciplines and structures we've been discussing solidly in place.

The character of your organization will influence the project: its size; its business; the number of concurrent projects; project dependencies; qualifications of staff; budget, and so on. These things will also influence your measure and selection of project tools; your assessment and mitigation of change's undesired impacts to business; and your assemblage of teams for defined projects. But any organization has very fundamental vulnerabilities and problems when mounting projects. We can safely say that all organizations suffer certain inefficiencies and undesirable impacts to business during any project's course: varying only by degree. We know things can *always* be better: In order to make best change to the organization, we must make positive change to *change management*.

For this, we must thoroughly understand the problems faced by projects, and the often unwitting contribution to problems by organizations and individuals. As we discuss projects, their general difficulties, and their improvements, we will see that the two most important elements in success (and failure) are: *project definition* and *leadership*. Keep these two things in mind as we examine common mistakes and misperceptions regarding projects. Assess your own organization's application of leadership, and measure your organization's project definitions. We will come back to leadership and definition after a thorough exposure of 'bad.' Exposing the bad in the face of projects is also key to 'where you are.'

DON'T APPLIQUÉ 'GOOD' ON TOP OF 'BAD'

Without a thorough understanding of common problems and their sustenance, you will drag “bad” along with your efforts to install “good.” Too often the good is merely an appliqué on top of bad – something looks and smells good for a while, but continues to rot underneath. Eventually, the top layer is infected by the bad, and you find that nothing has really changed. This explains the failures of many reorganizations and “shakeups” – that is, the failure of their objectives – they don’t go all the way to the true heart of the matter. In addressing the true heart of project problems, you must, again, know where you are. All projects and allied systems of management, no matter how good, have room for improvement. But particularly if your organization struggles with change, you must understand the ‘where you are’ factors that are contributing to difficult projects. Therefore, be patient with a necessary, *thorough*, exposure of “bad.”

Project management is a large discipline; we could devote the entire book to it. But most organizations have some familiarity with project management and, even for those that feel very inadequate in this regard, there already exist many fine books and references. If your organization’s IT efforts need help surveying business, reviewing products, conducting a fit analysis, etc., there are many fine, fundamental guides. On the other hand, if your business elements have difficulty defining their business practices and subsequent needs, there are many gurus, self-surveys and assessment packets to ferret and expose what your organization is doing – or thinks it’s doing. In fact, the amount of quality free material on the web is quite good. Therefore, projects and their management don’t go awry for a lack of advice, tomes, detail, and tools. They don’t even go awry for a lack of quality effort. So what precisely is it that can drive even the best intentions to frustration? Overall, we can pinpoint any project’s vulnerabilities, risks, divides, and deferred success by understanding the requirements of the Business-Technology Weave. When an organization fails to adhere to the Weave’s requirements, you cannot approach the modern standards necessary for best projects and change.

THE GENERAL PROJECT REQUIREMENT

As needs are identified or evidenced they must be acted upon: they must be serviced and met. If a need is big enough, comprehensive enough, and complex enough, it requires contribution from a collection of people - usually reporting to different lines of authority. As you would expect, these people and respective authorities are in both the technical and business areas of the organization, and

some may even report beyond the organization. Delivery on a large need requires an occurrence over time. Arriving at this delivery entails a careful orchestration of people, schedules, and resources in managing a bundle of hierarchical tasks and sub-deliverables. Needs such as these may be debated and exposed in your BIT sessions – driven by emerging markets, new products, changing technology. Or, perhaps needs have evidenced themselves through new regulatory requirements, or new demands from customers, members, or clients. Needs can also arise from shifting environmental factors, and the organization’s emerging alignment to new risk.

THE GENERAL PROJECT “BAD”

Keep in mind that with project management - as in many other things - less is often more. Ironically, it is the over-management of the process that frequently blurs the project’s objectives, as well as the project’s actual standing: the taxing burden on participants as they pour effort into a zone of diminishing return. Too often a project employs competing tools, conflicting advice, and duplicitous standards of measure. More effort often merely means: more effort. Realize that it’s not always the strength of your grip that determines success: even effort has a diminishing return. Overwork leads to mistakes, disruption of schedules, problems with morale, and burn-out. Over-survey of activity, riding people for results, or constantly ‘looking over shoulders’ is counter-productive here too. Another way to think of it: You reach a point where you’re squeezing a wet bar of soap - squeezing harder does not secure your grip; it does the opposite. Likewise, over-managing projects does not secure your grasp on the project or its success. It is the constitution of the “soap” that best determines the security of your grip (that is, the constitution of the project best ensures successful management to conclusion).

What happens when we’ve got the ‘wet bar of soap’ equivalent of a slippery project? People find themselves laboring under a requirement to deliver on ambiguous demands. Report of “real deliveries” slows, so there is an over-survey of negligible progress – which is then inflated to show “advancement.” This clouds the standing of the project, lowers standards of reporting on it, and opens the door to all kinds of ‘busy work’. The output of busy work can be all manner of graphs, charts, reports, and justifications. The inefficiency is not just in the generation of this material – someone has to spend time presenting it, and others have to spend time looking at it. This is usually so much fodder – it doesn’t contribute to traction or results. The real traction in the *poorly* mounted project comes from painful exposure of ambiguity, the scramble to cobble

together agreements under pressure and deadline, and constant realigning of the solution to each day's updated understanding of the main Need.

These adjustments mean that people within the project find that they have to run after other people in finding someone to handle exigencies and emergencies. There is simply no way to plan for “unexpecteds” to the same grade as “expecteds;” people begin to mire in escalating effort and cost as they realign the solution to the reality of business. “Settled” items require a resurvey and rescale of expectations. Too, frequently there is the juggling and reshuffling of schedules in trying to accommodate people who are supposed to be prioritizing their commitment to the project – but don't. Competition for poorly managed resources and people can mean that milestones, due dates, and critical deliverables are missed. Too often, the ultimate “go-live” delivery of a solution is missed. Sometimes projects completely stall and crash, as they are consumed by conditions of “Runaway.” Runaway in this case would be escalating effort that is being directed at cleaning up mistakes, focusing fuzzy ideas, and fixing erroneous expectations, thus robbing the effort to move forward. Once the focus blurs between what should be past, and what you should be doing to advance, the project is in jeopardy.

PROJECT JANITORING

In these circumstances, project managers become “project janitors.” Are you one? Are you someone who is turning a project manager into a project janitor? Poorly mounted projects can turn everyone involved into a janitor. This is certain: Projects that are managed on a janitorial basis are inefficient, and take too long. Projects that take too long hurt business. And projects that fail are very damaging.

The “Project Janitor” handle is a powerful one. There is certainly value in janitorial activity – no question. But that should not be the bulk of the effort in *managing*. Yet, this is what many people actually feel *is* project management: streaming identifications, slow-moving definitions, pop-up negotiations, and an awkward, off-balance set of ongoing cleanup activities. The project manager is thought of as someone who straddles difficult divides: bridging groups of people who don't often cooperate or even communicate with each other; mediating between groups who should be aligned; listening to and acting on complaints; and mopping up problems. All this, as the PM stokes the illusion that he or she is leading this comparative rag-tag effort in accordance with the disciplines of “project management.”

Because many organizations think that the *project as a whole* is meant to tease out details, or because they at least operate that way, the project's

definition at its outset is not fully realized. There is a failure to understand “where we are.” Without this imperative, solid definition of project, there is no hope for true project management or any efficiency in a project’s sponsored implementation of change. Needs aren’t fully exposed or understood: therefore it follows that expectations are lacking; agreements cannot be complete; true specifications have not been made; and the overall project clarity goes lacking. The result is the divide whereby a project’s course deviates from the murky business case that is supposed to support it. If you’re lucky, the project’s assumptions and ill-fitted deliverables slowly tighten and match the slowly focusing business need – until we achieve a “match.” This is part of our understanding for why so many projects feel like an off-balance lurch and stumble – with an eventual arrival at the “base” we’re seeking.

In the course of this lurch, many relationships suffer, and even become forevermore diminished. Your “luck” in this case is a final deliverable at the expense of a frustrated staff, damaged relationships, and a broken budget. The organization itself may suffer matters of impaired or diminished trust and credibility going forward. We’re not only impacting a ‘success culture’ in the immediate sense, we’re driving the quality of the organization’s culture down by setting and fulfilling negative expectations. The result: Every project will lurch out of the gate, with diminished expectations, dread, delays, an overage of cost, and at further expense to relationships and general business efficiency. The organization may even suffer a damaged reputation amongst the public.

THE DANGER IN DIVIDES

Poorly defined projects represent a divide between full understanding of need, and the exact methodology for bringing satisfaction to the need. As with most divides, other divides are spawned. There can be no real hope that “defined” responsibilities, schedules, resources, and “solutions” will be adequate: they cannot reflect the reality for what’s about to unwind. When projects are poorly defined, they actually become a sponsor of competing “understandings,” definitions, and requirements between people or groups. Because nothing fits together as effectively as it should, the organization spends a precarious amount of time putting things right along the way; now no one can do a proper job within the distracting pressure to deliver on objectives. This pressure compounds itself on a team effort. When project participants end up juggling parts that won’t fit as desired, it becomes very expensive to re-engineering the project’s components. This robs everyone’s energy and momentum for ratcheting the project forward.

Let's look at some other impacts that you may not normally consider, but which are extremely affecting. In problem circumstances, the project's schedule, or timeline, becomes less of a guide and risks becoming something that makes everyone look (and feel) bad. Risk of mistakes rises as project participants scramble to maintain the "cohesion" of a managed project. Resurvey, overwork, and mistakes impact not only the project and project team, but they affect business staff that has to over-engage on the project – crashing into their contribution in the daily business sphere. This all rolls up to a general organization impact – more effort, yet delay, and a necessary solution that is still in the distance. These circumstances will put you on the "back edge of the wave" – slip too far and you cannot possibly paddle fast enough to get back on the crest.

Soon, competition takes priority over cooperation as various units of the project attempt to protect their performance and solvency. It's important to note that people within the project labor mightily to present a positive picture of progress to stakeholders and 'outside' eyes: senior managers, governance, the board, shareholders, clients, customers, members, etc. There can be peril in reporting problems on projects – which makes people hesitant to do so. This impacts the truthful assessment for status, and therefore helps to manifest further problems. This yields an intensification of the "back edge", reactive, addressing of issues.

A HELPFUL ANALOGY:

When we define a project, we can think of its support to change as being similar to those plans and schedules that support the construction of a home. We can well imagine the expense and frustration if we did not completely specify the home to be built, with all of our materials, contractors, plans, and schedules fully identified and defined. If our foundation is brick, we need to specify those bricks at the very beginning. We expect delivery of the bricks that we defined and ordered. If upon delivery of our supplies, we find that someone made errors or assumptions that do not reflect the reality of requirements, we begin the divide.

If instead of bricks of our size, someone delivered those of another, we must re-engineer the foundation, or burn time procuring the originally specified bricks. What would happen if, instead of hardwood flooring, we find that the desire (requirement) suddenly changed, and is now for carpeting throughout? Or, instead of a natural yard, comprising trees, lichen, moss and rocks – a lawn is now required. What if entirely new requirements were introduced, such as a

pool and a guesthouse? In any of these circumstances, we suddenly need different expertise, different personnel, additional resources and budget. There can be no efficient ‘project management.’ The project is being redefined as we go. We need accurate identification and delivery on each area of expectation, because they support another area or phase of the project.

We can go much further with this analogy – such as knowing where we are. Is there a homeowner’s association that limits any of our plans in the build of our new home? Are there hills that require special drainage for runoff of water during heavy rain? How will surrounding “where we are” factors affect the project?

PUSHING (REACTING) VERSUS PULLING (LEADING)

Managing a shifting project becomes something that is less leading (pulling forward the objectives), and more *pushing* (standing behind problems, and handling them on their back edge once they are in full sway and influence). When you pull (lead) anything, you have the advantage of pulling in the direction you have set (the one you’ve defined). It’s easier – like pulling a wagon. Since you’re leading the wagon, it is continually coming into the incremental positions you’re pulling it into and through – known and desired positions. When you push something, you lose your advantage – it is much more difficult to “steer.” When we consider pulling and pushing in relation to people, we realize that we can best lead when people know what to do. When people know what to do within a defined project, they are constantly moving forward by virtue of this knowledge. From the leader’s perspective, this represents a positive bias, and pulling people (and the project) forward is an effective achievement. The project manager is able to lead on an efficient, macro (vs. micro) basis. When the project is poorly defined, people aren’t sure what to do, or they take mistaken action within their ignorance. In this circumstance, the leader must push people back into alignment, or push them forward by constantly collecting and dispensing knowledge that should have been better defined at the outset. Much like anything else, with project management you tend to push *toward* a desired destination (which is inexact) instead of pulling *into* a destination (which is exact).

Here we can provide two potent visualizations: one for the successful project, and one for the foundering project. Think of the successful project and it’s “pull” as a triangle: the point at the top is the ultimate project destination: a “go-live” date of a system, or a date for any deliverable. At the bottom of the triangle is the wide, diverse body of planning, initiatives, tasks, and incremental changes

that gradually narrow and converge to success as you lead your efforts to the “top” – a “point” of successful conclusion.

Now think of the poorly defined project as one that is “pushed” along, with leaders’ and participants’ *reactions* providing too much of the effort. In extreme cases, this project looks like a trapezoid: wide at the bottom, and wider at the top! Everything is pushed, not into alignment, but into diverging lines of “progress” – teams within the project may even work at cross-purposes. You may have paths that cross rather than support: duplication of work and even effort that cancels other effort.

When we push, why do things tend to diverge? It’s because people begin to compartmentalize; problems narrow individual focus. Problems focus attention such that a problem’s particular fix may not integrate into the whole of the project. Now we start to see why so many project elements are “done” – and redone - and redone again. When you operate on the back edge of problems, the collective view forward is not clear: if there are enough problems, the view is completely blocked. The destination is now murky, as project participants actually reverse direction. Frequently, they have to go further back, to discover problems’ genesis, and where each problem has impacted other areas. Obviously, the deferred advance toward a project’s destination is not a prudent part of project management – as it is avoidable. Project management, and project performance, is about looking forward, moving forward, and reaching the forward destination. Moving back is not only counterintuitive here; it is simply the wrong direction. Now, this isn’t to say that there can never exist a necessity to look back, or go back, in putting something right. No project will be perfect – but any sort of revisit activity should be minimal. If you’re running a project as a janitor, and if you find yourself doing more pushing than leading, the project will be all over the place.

Therefore, when you lead fully defined project initiatives, you find that things line up because you and others pull ‘knowns’ together toward a common point – the project’s defined destination. You are also able to stand ahead of what’s happening for a comprehensive view of your leading front, across the entirety of the project. You should be able to watch and monitor elements as they fit and snap into place, with minor adjustment along the way. Because your departure, route, and destination is known (the ‘where you’re going’), your entire posture is biased toward the “lead”, your efforts are spent on the forward momentum - carrying you to the fore of the forward destination.

Turning the Project Corner: If a project’s efficiency and success are set at the beginning, we can fairly ask: “What goes wrong so early?” And – “Why?” This is a pretty easy understanding to be had. We’re back to some people’s resistance

to, and fear of, change. They only engage when absolutely necessary, and then on a half-hearted basis. We also know that everyone is busy, and often times a “project” is not a welcome intrusion to the routine. Many people with direct assignments and tasks are not fully engaged at the outset of the project. Too, people can view the planning and defining phase as something other than “the real project” (but only if the organization lets them). There is sometimes an unwillingness to hold people accountable to the project to the same standard as their daily activity. The emphasis is on the day-to-day, where natural attention falls since we’re focused on the present: we occupy the “present.”

Therefore, know now that there is an increasing necessity to hold people accountable for the effort and value in their futures planning and delivery. Not just the leaders: This will become a high profile requirement of *everyone* in the modern organization, sized according to their specific role and whatever authority they may exercise. We will examine this requirement further in *Managing People in the Weave*, but the sense is essentially this: For each jobholder, define and set the expectation that they will help pilot that job into the future in accordance with our understanding of change. The aggregate of these efforts and awarenesses will set a collective forward bias in your organization. This awareness and effort in service to the future will then be well emplaced in your culture, leading to a natural support and readiness for projects. This natural support mounts the view that projects and change are a part of business, as opposed to an intrusion to it.

***GOOD PROJECTS MAKE THINGS BETTER;
POSITIVE COMMUNICATION MAKES BETTER PROJECTS.***

At your project’s conception, you’ll have many clues as to the successful definition and mount of the project. The preliminary quality of communication and effort between Business and Technology should be one of enthusiasm. As the project engagement between Business and IT is defined (the who and the how – think BIT), the team must expose needs accurately, slay ambiguity, match solution to expectation, gather commitment, assign and *acknowledge* responsibility - and shape not only the project, but also the project supports. Note that the poorly defined and overlooked things will create expanding deviations over time. It’s not so much the metrics, the measures, the tools, the reporting, the attention to issues, etc. Those things force themselves, if nothing else. Remember that unexposed divides - between project definition and business reality - rarely fail to yield a disproportionate effort in closing “divides that ride and get wide.” These divides generate inefficiency, instill confusion,

and rob the forward momentum of any project. They require an expanded effort in closing them, making people prone to mistakes, or errors in judgment: risky “short-cuts” become more attractive in these circumstances. The focus goes to closing divides in the schedule, instead of to the quality of the underlying work.

Most project problems are not necessary – from the high-level business view, they’re primarily self-inflicted wounds. Therefore, do not fail to expose all needs, accurately. Understand ‘*where you are*’ at the project’s beginning. (Since an understanding for ‘where you are’ is a requirement that serves the Business-Technology Weave at-large, lacking this understanding in the face of projects is indefensible). Be aware of some perils: lacking this large understanding in support of the project realm, the divide between where you really are - and the point from which you’re actually leaving - means that you’ll almost certainly craft a false route to your anticipated destination (the project’s delivery on the objective). Bear in mind the additional divides between all of the incremental needs, expectations and deliveries. Each divide will push laterally across the project, and cascade through the project’s projected course. Thought of another way, problems touch and begin to compact themselves into snowballs – and the snowballs will compact into snowboulders. They crash against milestone dates, and bump them back. You may not readily see how an issue *Y* affects an issue *X* – until they surface, combine, and leverage.

BE QUALIFIED TO ‘LOOK AT YOURSELF’

In fact, the unqualified organization cannot see or predict the damaging, interwoven, yield. Organizations that don’t manage change and projects well generally don’t know that they lack focus – that’s the best that they’re seeing at the moment. They believe that their foggy picture of themselves is the best “resolution” to be had. But - it’s similar to our view of a 36” television: great picture. Until we saw HDTV. Organizations need the “HDTV” granular detail of *where they are* if they hope to define, mount and conduct projects in the best way possible: with an efficient, reality based, route to success. That ultimate success is a properly sized solution at the destination of the project’s conclusion.

It can be hard for many organizations to see themselves as they really are. Since projects are always launched to make something better, there’s usually some discomfort, lag, or even broken process in the mix. You must identify any instance of non-cooperation, inefficient process, and breakage. If you don’t, a new project won’t fix your real problem. You’re back to appliquéing good on top of bad. This can yield two fundamental, ultimate project divides:

Ultimate Project Divides:

- 1) The yawning chasm between the solution's original delivery date, and the one that actually happens, and
- 2) The divide between the solution you need, and the "solution" you get – or in extreme cases, the "solution" that is abandoned.

Today, the flat-out unaffordability of missteps is evident – but unaffordability is quickly assuming a new definition: one of peril to business existence. Virtually anything that your organization does in the conduct of business is supported by technology. Therefore, the qualified organization must "look at itself" from the business and technology perspective – and effectively meet at the 'table of improvement.' It can do this by tasking project participants, business stakeholders, and any individual of standing to bring at least one, but hopefully more, improvement(s) to the table that *they or their department need to make* in support of better business (and in leveraging the project's delivery).

This aids in establishment of a positive, forward, bias on the project. Realize that in any circumstance, everyone in the organization has a theory about what someone else's culpability and contribution to problems is when things are less than optimal. This essential nature won't change in the loom of a project. There's usually not enough self-reflecting before communicating at the common table of project definition and launch. The Project Manager should task everyone at the project's outset to define an area for improvement that is central to them, their department, their work – and to bring their solutions and commitments for bringing improvement.

AN ASSOCIATION'S EXPERIENCE

We can consider an actual association, which was in dire need of a new association management system (AMS). Upon implementation of their last AMS, they had failed to survey and define their real requirements. They had mounted a project that delivered an AMS of limited service and support to business. They had been living with the results for several years.

As time moved on, and as business grew, their AMS became increasingly inadequate. It couldn't be scaled for growth. Searches for information were taking too long. The application had a poor "flow" – too often one had to 'back out' of one business process to reference necessary information elsewhere in the

application. After either printing it or writing it down, a user had to then restart the original process. At the same time, the vendor had fallen on hard times, and the product was poorly supported. The AMS' product suite was no longer growing and aligning to even general business considerations. Customizations to the core product were increasingly exorbitant.

Whatever the reasons, we can see that an upcoming change in AMS is a major project affecting virtually every department and person in the organization – and all lines of business. The general system tracks membership, maintains member demographic information, triggers membership renewal notices, maintains benefit levels, manages sales such as subscriptions to publications, sales of educational material or courses, provides reports and statistics, helps the organization identify and enter new markets, interfaces and delivers information to the accounting system, and essentially tracks and manages all business for the association.

In managing an effective Business-Technology Weave, we would want to avoid the selection of systems lacking service and longevity (an ability to remain in the market, as well as an ability to serve business). A new system needs an overall ability to adapt to new operating systems, new scales of hardware architecture, and new interoperability with other emerging products, etc. It also means an ability to grow with us; we want solutions that effectively support our ever-changing business on a long-term basis.

WHY PROJECTS REALLY SUFFER OR FAIL

In these circumstances, however, we should realize that 'project management' does not, generally, fail. *Projects* fail. This is an important realization: Nothing that is ill defined or poorly constructed can be effectively managed to success. *You have to have something worthwhile to manage.* Therefore, it is a project's very *definition* that is at the crux of success or failure. Or - any measure of failure, such as inefficiency, costliness, or incomplete fit.

For those who manage the project managers, you must understand the parity of the following necessity: you need the ultimate in project management, and you need the ultimate in project definition. So for that association, for anyone, let's make life easier.

DEFINE. YOUR. PROJECT.

When we define projects, it's important to understand a comprehensive requirement for projects' definitions: we're not just articulating, examining, and defining a business need. We're defining the support structure for managing and executing the project, within a defined situation (where we are), and a defined destination (where we're going; our project objective) and the project's defined course (how we're getting there).

Think of any project's definition as the foundation upon which your project rests. Nothing will succeed or stand on a weak foundation; therefore your project definition must be as strong as you can possibly make it. It will serve as the understanding between all parties regarding business expectations, participation, objectives, and final results. The project manager drafts the project definition, but all key participants in the project provide input, and the definition is an agreement between all relevant parties, sponsors, and stakeholders of the project – it's like a contract. It's also like a Constitution. Imagine questionable areas, ambiguities, and even “personalities” raising questions, during the project's course. Now imagine referencing your “Project Constitution” for answers and interpretations – *that's* the definition you want to build. As with all content, a proper project definition can be leveraged for future projects – it sets ‘precedent’; it provides illumination for what worked and what didn't,

Consider and define these elements when defining any project:

- ◆ Project name: The project needs an official name. It should be descriptive, but short. Think of it as the project's brand name – it should be attractive, in some sense.
- ◆ Project statement: Create a sentence that describes the situation being addressed and its resolution.
- ◆ Project Description: Create a brief narrative of the background leading to the project, and the project's context and goals. (Think of *divides*, the *closing of divides*, and a *projection through and past the hard project – to the ultimate, ongoing, benefit to the organization*).
- ◆ Identify and select solutions partners (vendors, contractors, products)
- ◆ Risk and management of risk
- ◆ Project manager
- ◆ Project sanction and sponsorship
- ◆ Project team/organization
- ◆ Responsibilities, assignments and tasks: expectations within the project, and for other staff and the organization at-large

- ◆ Objectives
- ◆ Deliverables
- ◆ Timeline: start, schedule, finish
- ◆ Resources/support requirements
- ◆ Budget/Costs
- ◆ Related requirements: dependent projects; infrastructure requirements; the overall organization schedule of activities and events; etc.
- ◆ Surveys
- ◆ Measures
- ◆ Reports

You may know of other areas in your organization that impact your project: make certain to define and attain the relevant agreements on any areas that can impact the project, or that need the project's addressal.

The sponsorship, sanction, leadership and confidence in the project – and therefore its ultimate success – spring from proper project definition. The project is already a success or failure the day you begin its implementation. The project's efficiency is already determined the day you start it. Your solution is either both aligned and fitted, or not - the day you finish your definition and plan. Proper project definition stems from everyone's "best game." This is where the BIT philosophy is leveraged, as you want everyone on a "moving business forward" engagement – projects don't have time to waste. Let's weave in an understanding of the upcoming *Success Culture*: Your organization has either established the larger disciplines surrounding any effort (such as the bars for performance, achievement, excellence, quality, and success), or it has not. Your project is birthed, lives, and concludes in the sway of your organization's overall culture and expectations.

It is also important to understand that a project's definition, and all that is contained within it, must unambiguously define all that is expected from the project – and define what is expected from project participants and general staff. We can easily see here the necessity for a Business-Technology *Weave*. The weave itself is a need and fulfilled requirement that precedes all others. It is a necessity for matching all subsequent business needs and expectations to business solutions.

When defining projects, think about what will *constitute* them. We spoke of a Project Constitution – and why not? This goes beyond the mere 'what are we doing, why, where, who does it, and when?' - and establishes standards, expectations, rights, authorities, and appropriate paths for resolution and accomplishment. Remember - your particular project constitution will be partly dictated by your organization's culture, and how effectively your organization

manages in general. Your project constitution should bear some earlier things in mind:

- Understand the people – know their capabilities, their strengths, their weaknesses:
 - IT staff
 - Business leaders
 - The user body
 - Senior management

Here too it is helpful to examine the “Where You Are” and “Where You’re Going” review from Chapter Three. Consider the aspects listed there, and apply them to your project definition as you deem fit. The important thing is to leave no area unexposed – at least examine these aspects and, as necessary, add them to your project definition and identify all detail and support as necessary – in constituting and defining your project. If you’re able to define a project according to the organization’s true need, in accordance with true sanction, and in alignment with a few important sponsors, you are in a position of strength. Once the strength of your project is defined, you can then load that project into any of those wonderful templates and tools that are available.

STRENGTH

We can close a divide by considering a vulnerability as an opportunity – an opportunity for strength. By adopting this view, we readily expose these areas for positive potential (at the same time, this outlook brings a “moving business forward” approach to them). When we examine the environment for vulnerabilities, we can present the vulnerability to decision makers in a powerful way: we not only show the strength to be had, but we should be able to articulate the risk in allowing a vulnerability to remain. Particularly in cases where a vulnerability impacts a “pillar” of the project, you should be able to indicate to the decision maker a balanced assessment of risk. But the ultimate aim is to close the divide as you drive toward the positive in outlining what is necessary to turn this vulnerability into a strength.

We’ve discussed the liability and vulnerability of poor project definition, and the strength to be had from solid project definition: We know that we must have something worthwhile to manage. We should know now that the worthwhile project requires worthwhile management. It requires leadership: Beyond definition, the modern project’s other main vulnerability is a lack of leadership.

LEADERSHIP, LEADERSHIP, LEADERSHIP

Just as we understand real estate's three most important factors - location, location, location - project management's factors can be thought of as *leadership, leadership, leadership*. As an otherwise great property can suffer in a bad location; an otherwise great project can suffer from poor leadership. And, as an otherwise diminished property can benefit from a great location, a poorly defined project can benefit from a great project leader. In these limited pages, we can effectively address virtually any organization's project challenges by helping you to identify and emplace the *right project leader (or leaders)* as matched with a proper project definition (and the right sponsorship and sanction, of course). We can then outline and bullet some high level concepts for the attention of your leaders. The right project leader can do many things for us, but here in these pages we will rely on a project manager (PM) to *define* the project properly, to take advantage of existing guides and practices in *leading* the project to success, and in helping all participants maximize their contribution along the way.

When we establish leadership for a project, we not only require the obvious PM, and any other necessary project leads, but the project itself must have the weight of a larger, sanctioning, authority. This sanctioning person, or body of people, will represent sponsorship as well. But unlike other sponsors who merely facilitate the project's forward momentum, and contribute to the goodwill surrounding the efforts, this authority has *power*. For most organizations, this means an Executive Director, a President, a governing council, a Board, etc. For any size of endeavor, there must be a "trumping" authority above all others who are within the project's influence. An overarching authority must express their engagement and belief in the project – as sanction – and it is helpful to express that commitment on a regularized schedule (such as during monthly staff meetings).

This authority must also understand the project's definition, obviously, and have some measure of understanding for the project's structures and supports. It is their responsibility to do that as the ultimate project sponsor. When the organization throws its full weight into the success of the project, no one can hold back "in case this thing doesn't go," or because they harbor a selfish agenda that can jeopardize the project's success. Later, we'll talk about the "IT Enlightened Organization", which qualifies senior-most authorities to help vet projects and solutions, so as to have their own *self*-assurance in committing their authorization and leadership to these endeavors.

From a project point of view, too often projects and their leaders seem orphaned or abandoned: it becomes difficult to garner engagement, and the

project comes to be seen as an interruption to work. All projects are a part of work, and their priority should be known and respected. The ‘leadership’ and ‘best effort’ components to defined projects is a self-reinforcing Weave all its own, and is necessary to conduct and conclude successful projects. The project has to be saleable, and sold, to everyone involved – not only direct project participants, but to the whole of the organization. The organization must believe in it. Our later discussion in *The Success Culture* helps here, and it can certainly be helpful at this point to jump ahead to that chapter, and return. But for now, we need senior-most management clearly conveying their sanction of the project, and sponsors must be known, engaged, and setting the example. Leadership, as defined within the project, means powerful, committed, and believing authorities that will drive all other leaders and lesser authorities toward the project’s successful conclusion. As we get to the project manager’s level, we see the necessity for a strength of position: We can easily see that a project leader has to *qualify* to fill that position.

THE PROJECT MANAGER

If we’ve defined a project, we should be able to believe that an effective leadership will align effort and deliver success. Projects demand a special kind of leadership, so let’s discuss the special qualifications of the Project Manager (PM). These qualifications extend too to the entire project team, and it is the PM’s example that helps to develop and maintain an overall project character. The PM is a person with solid qualification, but as importantly, is the kind of person who will quickly add to her or himself what’s necessary to be qualified for any aspect of the project’s management. Since no one can know everything, it is important to select a PM with impeccable self-start ability, and a capability for learning quickly. The right PM will emplace the necessary success factors to all areas of the project.

Consider that implementation of the new association management system. Obviously the implementation of a new AMS, and the transfer of the history and daily conduct of business to the new system, is a challenging endeavor. It involves a lot of people, and lots of sensitivities. It will require effective communication at all levels of the organization. Just as importantly, the project’s sponsors and leaders must manage perceptions and emplace their version of reality – one that reflects the actual status of the project, and one that incorporates excellence in all phases. Here too our greatest challenge will be the people – Technology and Business staff alike. Project management’s main efforts will be communication and the coordination of schedules, knowledge,

activities, and resources. In these regards, the objective is to leverage and maximize a collective human effort in delivering a solution.

In extremely large endeavors, some of which bridge organizations, agencies, and outside solutions partners, a very large team will be involved. But whether extreme-scale endeavor or basic project you need people with certain, common, strengths of character. For this reason, we can start with the attributes of a good project manager. Everyone associated with the project should have these qualities – but the project lead’s character *must* harbor these traits in very strong measure, as this lead will be expected to set an example, and also to surmount any shortcomings in the technical or business realm with civility, tact, and result.

Business systems, even shelf applications, are very sophisticated and complex today. The expected deliverables from these systems is increasing, and the reliance on this fulfillment is sometimes overwhelming organizations and their staffs. The planning, selection, sizing, customization, management, and maintenance of these systems – *as an appropriate fit to business* - is an art as well as a science. Finding the right people to address the burden in effectively matching these systems to business requirements is imperative – therefore, you must not “under spec” your PM.

THE ATTRIBUTES OF A PROJECT MANAGER

The efficiency and success of any project requires a lead person with these leadership attributes and abilities:

- ◆ Patience
- ◆ Judgment
- ◆ Communication Skills
- ◆ Seeks Responsibility
- ◆ Takes Ownership
- ◆ Gets Along with Difficult People
- ◆ Can Handle Pressure
- ◆ Has Technical Knowledge
- ◆ Has Business Knowledge
- ◆ Stays Informed
- ◆ Possesses Sound Judgment
- ◆ Knows How to Push
- ◆ Knows When and What to Delegate
- ◆ Knows When to Seek Help

- ◆ Is Proactive
- ◆ Follows-up

If you get the right manager for a project, you're 90% of the way home. If that seems an overstatement, think to projects where you may have had the wrong person managing. If that's happened to you, you know how costly that can be. This chapter can help you identify the best person for project management (and by extension, the project management team), but no less importantly, this chapter helps you to groom that person through the identification of what can be expected of them and the requirements they'll be asked to fulfill. If you are a PM, consider these attributes in depth and relate them to project management:

Judgment: For extremely large projects in large organizations, or projects that are spanning and influencing different, yet aligned, agencies, there will be almost a diverging set of priorities here. Project stakeholders well above direct PMs, and those who provide report of survey and measure of progress to even higher authorities, will have a heavier political and diplomatic approach to project progression – frequently at the expense of hard realities. Individuals at very high levels soften focus and often buffer their communication at the expense of the message that best serves the project. These situations require a very tight tether between those high level leaders, and those whom are dealing with the realness of aligning and progressing the project.

Under these circumstances, those in the direct realm of the project square should not succumb to an overage of political sensibilities – the “politicians” can soften and blur, but you must ensure that they are doing so with full knowledge of any risks and possible project penalties that can arise; such as when hard and fast issues and need for settlements are not effectively addressed. The PM's judgment here must be finely tuned, so as not to create false alarm, but yet focus attention where it needs to be: to highlight the gaps between true attention, action, and results.

Having said that, we can keep this relatively simple – any project manager, at any level, is going to employ judgment in a variety of disciplines and circumstances, no matter the project. Unless you're willing to have someone running to you seeking your guidance for each nuance outside the ordinary, or seeking your approval for that which is going to be done anyway, find someone with judgment. Someone who possesses good judgment will have confidence. Confidence is contagious, and the PM should radiate confidence.

The PM will employ judgment when assessing the success of each project element, and whether it is prudent to progress to the next step. Very importantly, the PM is going to choose, or assist in choosing, the project management team.

The PM will be employing judgment when choosing people for assignment of tasks and delegating responsibilities. Not only must the PM judge people according to who can best handle an assignment according to education and training, the PM must posit tasks and responsibilities in accordance with workload. The project requires a delicate balance of all resources.

At the same time, you want your PM to keep you informed: The PM must judge information regarding the project and separate that which is “newsworthy” from that which is routine – and report accordingly. Therefore, another area of judgment involves cases where the PM has to go “up-the-line” to get an overarching authority to facilitate movement on the project. The PM must know when to seek out this authority, and must also keep their supervision and sponsors informed. The PM must understand balances of power, and political sensitivities – or at least be able to suspect where these things lie, so that they come to you for guidance at the appropriate times.

Patience: The project manager must have an abundance of patience – in fact, patience in excess of the demands of the project. Look for the person that does not make it a habit to complain. The PM must never lose his or her “cool.” Never. It’s been said that a bad first impression is only overcome through six subsequent positive episodes. Some feel that a bad first impression can never be overcome. In the challenges of a project, one moment of anger, even one episode of negativity will not only impact the PM – it will cloud the project in a degree of negativity that you don’t need.

The project manager will be the anchor – the person to whom everyone else looks to for confidence. This person will provide the assurances that the project is moving along, that obstacles can be and are being overcome, and that expectations are being met. The PM will always rotate any problem to present the plan for solution, and will remain in control regarding outcomes. That way, regardless of specific challenges, the rest of the project team, peripheral players, and the organization will have nothing but confidence that the PM will surmount all problems, and that the project will succeed. It’s that simple. It may not be easy, but it is that simple. The PM really becomes the living embodiment of the project. Recognize that this makes the PM the target of criticism and the recipient of complaints. Therefore, this person cannot take things personally, and must maintain a business perspective through all challenges. Select this person and groom them such that *nothing* knocks them off their base. If you are the PM, become this person.

Communication Skills: The PM must be selected for an ability to talk to different audiences, or “ears.” In other words, the PM must be able to talk to

different groups in their own “language.” Remember that this person will be speaking to non-technical business representatives, the IT team, vendor PMs, the vendor’s technical teams, and on occasion upper management. The PM will also be doing a lot of listening. Make sure this person is able to listen completely, and to digest what is being said. The PM will be listening to all sorts of people who may not have good communication skills themselves, but who are nonetheless important to the project – therefore it is incumbent on the PM to listen and to ferret out the important information. Also, the PM must be able to weigh the quality of communication between others, to ensure understanding in all directions. The PM must also gauge that what she or he is communicating is accurately understood. Verbal acknowledgements and nodding heads mean nothing without the PM’s complete satisfaction that everything is properly understood all around.

The PM will be collecting business requirements from business members and translating those to the project team for vetting and for crafting of solutions. The PM will also be translating technical matters and requirements back to business staff in the course of testing and delivering on expectations. In this diverse mix, it is more than likely that the PM will provide or assist in status presentations to staff, management, and possibly board members, governance, and other oversight committees. This person must know when to speak, the degree of detail or brevity required by the audience, and what to convey. No less important, the PM must be able to control and steer conversations. Where a meeting or an agenda starts to drift off-topic, or into non-productive areas (such as over-plow of the same ground, or the airing of ungrounded fears and consequences), it is time for the PM to exercise some discipline in bringing the discussion back to the positive. Again, remember our question: “Does this move business forward?” A “no” answer means the PM must bring the conversation back into the zone of productivity. Far from being merely “smart,” or articulate, your PM needs a comprehensive balance of communications skills.

Takes ownership: The PM owns control of the project – this person has a vested interest in the successful outcome of the project, and in the successful management of the project to meet stated expectations. The PM believes in their own expectations, such as the achievement of milestones by expected dates, cost control, and ultimately an on-time delivery of the business-ready solution. The PM also steps up and assumes ownership for ambiguous tasks, or steps in and identifies a delegate. Nothing languishes and all variables are identified and assigned for identification and solution.

For example, let’s say that within our new Association Management System project, the senior director of the Expositions department needs to identify

finance codes used for her department; these codes help track revenue and expense in relation to conference booths, hotel rooms, and services, etc. Subsequently, the Chief Financial Officer needs to approve the codes. The IT department can then test them - but ultimately Expo will even have the authority to edit and configure their own codes.

The project manager has asked the Expositions director to create the codes, submit them, and to then meet with the CFO and PM by a certain date in order to have an approved set of codes ready for IT's input. However, the Expo director has failed in this task, missing several adjusted dates for completion. It is now incumbent on the PM to make this happen by setting a meeting for these two and ensuring that they do actually meet and hammer out the codes. It matters not whether the Expositions director has valid reasons for missing the assignment or not. It matters not whether the CFO has made himself available for consultation as requested.

It is the PM's responsibility to move the process along in ensuring that the codes get created for input. Regardless who owns each incremental task – the PM is the ultimate owner and will answer to each success.

Knows when and what to delegate: This area lies very close to the project manager's overall level of judgment. The PM, in conjunction with the appropriate manager, must delegate tasks and requirements not only according to what is *appropriate* to delegate, but must delegate things in accommodation with the *resources available*. This is very important, so let's break it down. First, appropriateness: The PM can only delegate that which makes sense. Keep efficiency in mind. Don't delegate something to a person who will require more of someone's time in shepherding them through a process than if you simply delegated it to the "shepherd" in the first place. (An exception to that would be in the case where the shepherd is in a training role – but many project initiatives, and many projects themselves, are not the best situations for training).

Be certain that delegates are qualified by knowledge and experience – that's obvious. But keep in mind too that delegates must possess the requisite confidence and judgment. No less important is the balance of overall work: the PM must ensure that some are not overtasked, and some under. Keep in mind that inefficiencies "ripple out"... inefficiency is seldom contained. It spreads and steps on others: any body that has to do anything to overcome another department or person's inefficiency becomes less efficient themselves. Determining where this ends is difficult – just whack inefficiency at its source.

An example of an appropriate delegation might be as follows: The PM has determined that test-data has been migrated into an order-entry module of the AMS in a test-environment. The data supports the order history for products

purchased by members. There is now a requirement to run reports on the test-data to show that the data in the test-environment reflects the actual data in the production system (the system that will be replaced). The PM can delegate these reports production to an appropriate IT staff person. Once IT has verified the data and the performance of the module, the PM should also task a business person to review various member records for accuracy in the test-environment – and indeed must do this in order to receive a sign-off from business indicating that the data is acceptable. Where appropriate, business staff can also run their own reports, and should check data in the system to their own satisfaction.

The PM must also delegate according to *resources available*: We have a task that needs to be delegated – who has the knowledge, time, and necessary access to other resources? Here is where the *when* as well as the *what* comes into play. Hopefully the PM has built an appropriate timeline that makes effective use of everyone’s time. Things that can happen in parallel do, and elements of the project that depend on other things are sequenced properly. The PM may have to wait until an appropriate person’s schedule opens up to handle a task or requirement. The PM must not overburden delegates, and must balance the load –dispersing it amongst individuals *and* dispersing it over time.

Is not afraid of responsibility: A good project manager enjoys having responsibility. This person takes pride in knowing where things stand that are under his or her purview. They ensure that things are accomplished according to standards and on time. At the same time, they perform their direct duties and tasks to the same standards: production of status reports, scheduling of meetings, publishing of agendas, etc. Because project management involves a myriad of things in various stages of development, this is the type of person who can “flex”... someone who can ramp up to the exigencies of the day. Also, emergencies are handled with the same balanced behavior. Whether it be a bad data conversion that needs to be reconverted, a meeting that needs rescheduling, an adjusted date for completion of a major milestone, the PM takes it in stride as a “part of business” rather than as an “exception to business.” Within project management, the *non-routine* is part of the routine. The PM knows this, accepts it, and embraces this as part of the job.

Gets along with difficult people: This is of critical importance and may seem obvious – but in large-scale implementations things can get testy. There is almost an exponential increase in the risk for misunderstanding and friction as you increase the number of people involved in any endeavor. Therefore you must *manage* and *control* to limit this risk. The PM must always be seen as the measured voice of calm in any situation. The PM is the “go-to” person for all

concerns, problems, answers and solutions – their credibility must be solid. The PM is one of the most important “constants” in the project.

Difficult, or unreasonable, people can be handled in a variety of ways depending on circumstance. Some ways to work with, through, and where necessary around difficult people are discussed in the chapter *The Criticizing of Excellence*. For now, remember that any conversation with any person involved anywhere near the project is always positive on the side of the PM, with a steering back to the business at-hand, and an eye on solutions. Any objection that cannot be overcome by the PM’s limited authority will be politely escalated, through an identified channel to handle any episode – as we’ll talk about in detail in subsequent chapters. For now, remember to handle criticisms and to identify paths for resolution with simple, obvious questions: “What can I do to help you?” “How do you see this issue being resolved?” A good one is: “How do you see yourself contributing to the solution? Can I count on you to _____?” Get a commitment.

Most of the difficult people in this world rely on ambiguity and things that are poorly defined as their fertile arena for criticism. So – nail down what needs to happen, in their view, and who will do what to achieve that which needs to be done. Anything that is unreasonable in their view then becomes immediately apparent, and can be handled. That which is reasonable gets identified and assigned for resolution. Remember to ask: What can each of us (including the difficult person) do to move business forward? Hold the difficult person accountable. Some people will respond better to a very business-like demeanor. By that, we don’t mean that they prefer it. They may prefer a friendly demeanor - someone they can push around. But they may respond, that is perform, better if you keep things brisk and business-like.

Difficult people may then sense that if they “lighten up,” the other people in the project are likely to be a little friendlier, and the difficult person may therefore decide to play nicer for the duration of the project. This is especially true if you have a strong sponsor who will back you in placing requirements on the difficult person. That person will then begin to focus more on fulfilling their requirements, and will have less time and energy to devote to being difficult.

Can handle pressure: The project manager is a person who handles stress well. The PM generally knows who is doing what at all times. Whatever specific information is required is gathered by the PM according to need. If the vendor’s technical team is doing a test-migration of data to a module of your new AMS, the PM has to know how the migration went immediately after the performance of that migration. There are people waiting to test the data in the AMS test-environment. If something doesn’t go according to plan, for example if the

wrong data is migrated, the PM must again align resources and reschedule that project element. The PM will also have to adjust other requirements based on the part of the project that is being redone. If any parts of the project lag, the PM must find the reason and facilitate progress.

The PM will often be dealing with people who “feel the squeeze”, as will the PM – so, again, choose this person wisely. The PM will frequently be reporting progress made by teams comprising people over whom the PM has no direct control. That is, there will be internal business staff, and outside contractors and/or vendors (your solutions partners), and maybe even IT teammates that under usual circumstances have no reporting requirements to the PM. The PM does not rate these people or supervise them in the usual formal sense. And while each member of a project team’s performance will factor in an appraisal, reward, and discipline process of some sort, these are not usually dispensed directly by the PM – particularly to those outside solutions partners. Therefore, some management levers that one would normally have at one’s disposal are not available here. The PM cannot grant compensatory time to a vendor staff, for example. Nor can the PM discipline a business person for failing to put proper attention to a project element. The PM will find that there are some weak levers employed at times in getting the job done – humor, charm, or negotiation to get something done.

Here the greatest stress comes from the feeling that there is a lack of control for outcomes. However, the PM need never plead or grovel for cooperation. The PM need merely go to the chain of authority that is charged with judging situations within the project, and with dispensing the necessary guidance and discipline in bringing people to account. Generally speaking, it is the “even” temperaments and the even personalities who can handle and work through this stress, seeing the way clear to imaginative ideas and solutions in getting the job done under this kind of pressure situation.

Technical knowledge: We know that the project manager will have a degree of technical knowledge, and that any IT-Business project demands it. How do we determine the level of technical knowledge, and more importantly, technical aptitude, necessary for the project? Remember, any project is likely to require the acquisition of new knowledge both within and outside of a person’s primary area of expertise. The question regarding technical knowledge should be satisfied by accommodating a few main considerations: Determine who is best suited by virtue of their usual job function – and, when several people meet this first criteria, determine who is best suited according to disposition, workload, and general aptitude. In our example of the new AMS system, it might be logical to select one of the programmers, someone who works on a regular basis

in updating and modifying the current AMS system. Such a person already knows the business end of software requirements, and has experience in satisfying these needs on the technical end.

Assuming there are several programmers supporting the AMS, we would then look for someone who met the other criteria that we've established in defining a good project manager. People sometimes lobby to lead a project, offering to step outside their area of expertise in the hopes of gaining "more experience" – not the seeking of project management experience, but rather the seeking of new technical knowledge and experience. Projects are not good training grounds for the acquisition of new knowledge. Always utilize someone who is very grounded in the technical knowledge and best practices that will be supporting the project.

Business knowledge: The project manager must have a solid understanding of the specific business and its conduct under present circumstances. Certainly the PM can't understand a business element as well as the business associates who are in the day-to-day routine and who may have years of experience conducting this business – but – the PM must have a common reference for understanding most of the concepts for the conduct of this business. You want someone who can grasp concepts quickly and accurately. The PM will be meeting with business elements to do requirement surveys and to familiarize the project team with the business element. Because Business is, well, conducting business, their time is extremely valuable. Your PM *must* be as efficient as possible in grasping concepts and in building a solid understanding of business.

A general understanding of like-business elements can be leveraged here: an astute PM will be able to "pick-up" the details of business modules quickly, and this is the quality to look for in a PM in this regard. It is also a boon if your PM has enough business acumen to suggest better ways of conducting business – you can really leverage the implementation of new software applications as this is a great time to build the accommodations for better business routines. Keep an eye out for someone with vision as well as knowledge. Again, in this case a programmer already has a relationship and rapport with business through the satisfying of program requests, and is a logical selection for project manager in the case of our AMS implementation.

Stays informed: To say that a project manager stays informed may seem obvious – how else to know the status of a rapidly changing environment? But here we speak of, perhaps, a less obvious state of being informed. What we need to look for is the IT professional that not only knows his or her chosen area of IT, but also stays current in their surface knowledge of *other* areas of technology. The

best computer programmers also stay abreast of server and network developments and capacities, etc. – just as an example. Network engineers not only know about infrastructures and connectivities, but also should be knowledgeable about databases and their requirements, etc. We want overlap. We want talent, and a pride in staying informed about... the *weave* of all of these elements. This person should be informed about your internal business practices, and also the general best practices affecting your industry, trade group, partnerships, and so on. Obviously the better informed your lead player, the better that person is positioned to pull everyone's "best-game."

Knows how to push: Projects generally involve pressure situations. Indeed the entire project by nature is a pressure situation. A project is not a permanent situation – it must be mounted and resolved so that an organization can focus on business. The more you can safely compress a project's timeline, the better you are in terms of resources like money, time, staff availability – and other peripheral influencers such as evolving operating systems, business cycles, competing projects, etc. And let's not forget the obvious: we want the project's benefit to apply to business as soon as possible. Therefore, there's generally a need to get things done quickly, get them done correctly, and to fix things fast that don't go as anticipated. The PM has to know how to overcome obstacles: from objections by staff who may squawk about tight deadlines, to challenges by vendors regarding schedules – the PM must be able to *negotiate* and *sell* in successfully leading, but inevitably pushing too, the project along to meet objectives on time. Therefore the PM must be a person who can be resolute without being overbearing, insufferable, or unrealistic.

Knows when to seek help: We touched on seeking help when discussing a project manager's need for good judgment. As the PM manages the project, there will come times when forward momentum is put at risk. Negotiating with an individual, or even one department is fairly straightforward. But issues are compounded when they cross various departments and interests. This is when the PM will need to seek help from the appropriate authority – it's either his or her supervisor, or a level beyond that supervisor's - where the authority has ultimate dominion over those departments and individuals amongst whom the issues develop. The PM must have the judgment to posit the problem with the supervisor – not just in the interest of keeping their supervisor informed, but also in passing the judgment to the supervisor for the appropriate escalation of the issue. If you're the person project managing, remember to report the problem factually and to have some ideas for solutions. The reverse of the question "How does this move business forward?" can be used to expose the problem in the

appropriate light: “How is this hindering business?” - that is, what is the hindrance to the business of the project’s forward momentum?

Along with pushing the project, the PM has to know when a required push is too “heavy.” Just as you would seek help in pushing or lifting a very heavy object, the PM must know when to seek help in pushing an issue that is too heavy for the PM alone. In the heat and details of the project it can be very easy to cross the line and try to affect an area beyond authority. Be very careful. The PM can hurt their standing in the organization if the project tunnels their view to the exclusion of appropriate behavior or sanctioned action. An attempt to push resolution to an issue, particularly in cases where a specific lag is generating risk for putting the project at-large behind schedule, can be tempting and obfuscating. Be aware of all sensitive escalations and necessary increments in matched, sponsoring, authority.

Follows-up: This is of critical importance. The obvious point here would be to say that it’s necessary to follow-up on elements of the project to ensure that they are progressing and being completed. Not so obvious may be the level of care about the end-user experience. Not just a care and necessity to survey and satisfy the business community, but in how you go about that. In our example, users will be testing and approving software modules in our AMS, and providing feedback along the way. Follow-up with these customers is not only necessary, it is important that the entire project management team ally themselves with the users – from the top down - President to administrative assistant. They do this by showing themselves to be involved with the user community’s cares and concerns - their experience.

In addition to formal surveys and meetings that solicit this feedback, the PM should cycle through departments occasionally, visit with critical users, and associate with staff on an informal basis in collecting feedback. Not only will the PM, and by extension the project management team, be seen as caring – but the PM will receive important feedback and details during this kind of follow-up that may not “tease out” in a more formal setting.

PROJECT MANAGEMENT NECESSITIES

Now that we’ve identified what a good project manager is and does, let’s list some project management necessities for support of any good project. Everyone and every organization has their own style in handling people and projects, of course, but there are some very fundamental things that must be done. Best practices in this regard have been identified and developed - make use of them.

It's surprising how many people mount major projects that are unaware of many simple concepts, tools, and practices. Some of these practices are a reinforcement and an expansion to our basic model for handling change. In addition, we need a reminder to employ some things that are common to managing any work experience: discipline, accountability, and recognition.

As we list things here, we can gain some important perspective. First of all, realize that there will be some items that are already contained in our Project Definition list from above. These items are not redundancies – rather, these will be items both central to project definition, as well as to the project's management. For example, a project will be partly defined according to the finite money available to it – the overall budget. But the budget factors in another obvious way – that other way is in the management of the budget. It is crucial to apportion the budget appropriately as a resource to various efforts and goods within the project. Don't suffer the divide between a robust project budget, and the squander of it through poor exercise of it; it must be managed.

At the end of our list, we'll examine some specific areas in detail. We can show how to apply our increasing understanding of the Business-Technology Weave so as to influence the examined areas in a positive way (and by extension, you can “model” your insight to the other areas).

Project Management Necessities:

- ◆ The Project Manager
- ◆ The Project Management Team, comprising elements of:
 - Sanction
 - Sponsorship
 - Business
 - IT
 - Solutions Partner(s) – Vendors, Contractors, etc.
- ◆ Project Management Tools
 - Agreement
 - Use
 - Measures
- ◆ Full Disclosure and Discovery of Needs
- ◆ Determined and Documented Expectations
- ◆ A Project Definition
- ◆ Commitments
 - Establishment and agreement to success factors

- ‘Rules’ of engagements
 - Rules of escalation and resolution to problems
 - Fully exposed, understood, and agreed to responsibilities in all areas and phases of the project.
 - An acknowledgement of flexibility and cooperation by all parties in deference to the project’s ultimate success.
- ◆ Resources
 - Budget
 - People
 - Equipment
 - Time
 - ◆ Project Timeline
 - Start
 - Schedules
 - Milestones
 - Training
 - Deliveries
 - Tests
 - Go-Live or End-delivery Date
 - ◆ Information (think of content management principles; apply them to the project).
 - Reference material and guidance
 - Reporting of status
 - Overall project standing
 - Issues tracking and resolution
 - Ongoing Analysis and Alignment, as necessary
 - ID of Key Personnel:
 - Special expertise
 - ‘Go-to’s for various exigencies; emergencies (this is also supported by the Project HelpDesk)
 - Establishment of proper liaisons
 - ◆ Project HelpDesk
 - Service and support
 - Eliminate and prevent ‘silos’; obstructions to accomplishment
 - Issues resolution, or coordination and escalation as necessary
 - Liaison between Business, IT, outside contacts, as necessary and as assigned.

- The HelpDesk is “Keep Moving Central” – that is, it does everything it can to keep things moving; by ticketing, tracking, and dispensing issues for resolution. As in any HelpDesk, everyone is a customer, and if an issue is not squarely within the HelpDesk’s ability or authority to resolve, it will still do everything it can to steer issues and personnel to the correct area for resolutions.

Your PM, associated team, and anyone involved in the project needs to understand the project’s definition and supports. Part of the PM’s initial contact with ALL direct project participants should be an expository training on the items we’ve listed above. The PM will explain the various project supports and how the pieces fit together for a total reinforcement to a forward momentum.

PROJECT MANAGEMENT: A VIEW THROUGH THE WEAVE

As we mentioned, let’s look at some areas from above in greater detail, from a *Business-Technology Weave* perspective. Let’s examine:

- ◆ The project management team;
- ◆ Information (the information required for, and generated by, the project);
- ◆ The ‘Where We Are,’ ‘Where We’re Going’ and ‘How We’re Getting There’ concepts.

A Project Management Team: This is very similar to setting up the BIT team – follow that model as developed in our Weave, and run the team according to that ethic of engagement. It is likely that most of the project management team is to be comprised of BIT people. There may be other people from respective areas of business that the project is influencing, and from which the project is drawing input. In comprehensive cases where a project affects the organization at large, you can simply use the BIT sessions in piloting the project, with the addition of any necessary additional internal business staff, IT members, and any necessary outside solutions partners. Additional personnel resources may in fact be from any level; they can be people who are directly involved in the granular details of business functions and process, to higher-level stakeholders in the project.

Remember that when we talk about the team’s “definition,” we’re not only speaking about who comprises the team. We’re establishing the members’

responsibilities, and the expectations for their contribution. We're also defining the conduct of the team as it executes its responsibilities in reporting on and in steering the project. For example, you may find yourself vetting activity or behavior by asking the question: "Does this move the project forward?"

Project Information: Information – whether paper based or electronic, and whether representing plans, reference material, e-mails, and so on - should be managed as project *content*. Content Management is the ready identification of information's worth; exposure and understanding of specific information's relevancy to business use and relevancy to *other* information; and an ability to find and get what you need efficiently (among other things). The upcoming chapter, *Content*, is helpful here and should be referenced. Basically, we want to leverage all project-specific information across the entirety of the project – nothing should stall because someone can't find a permission that's already been granted, locate an existing file that's needed but can't be found, or find or even know about the existence of published instructions, etc. The Weave defines content as a leveraged information *asset*. Make sure all project participants know where to find needed content, make sure all necessary information is made readily available.

Content can also pose a liability. Make sure project content is *up-to-date*! Be sure that it is a clear, concise and accurate reference. Also – be certain that access to specific content follows the organization's security guidelines. It should be obvious that not everyone is authorized to all information. Sensitive project information must be managed and secured in accordance with the governing policy for all of the organization's content and security measures.

Where We Are, Where We're Going, and How We're Getting There: Manage the project in accordance with our previously discussed concepts: Know where you are. Be certain of sponsorship and sanction. You must plot the route of the project from a known start point – understand the "lay" of the organization – all strengths and all weaknesses. Examine the organization's weaknesses for vulnerabilities to the project: do everything you can to turn vulnerabilities into strengths. Chances are these vulnerabilities are things that are overdue for attention – the organization may as well address them now, in the face of the project. Understand the destination. When you plan the "route" - the assignments, tasks, deliverables, metrics, reports, and ultimate "arrival" – be certain to create a timeline and milestone achievements that are reasonable. Make certain you arrive at the organization's desired, required, destination – not some approximation.

A Perspective on “Arrival”: We recognize that there is a delivery (fulfillment) that any project must make. But further, once you’re at the destination of the project’s conclusion, you must realize that there is a success-qualifier that is only measured through satisfaction over time. Keeping this perspective in mind helps project participants, and all project contributors, to avoid a myopic view of the delivery, or “go-live” date, as the “end of the project.” Viewing a project too much in terms of its end, and a “thank goodness that’s over with” attitude, can diminish a standard of effort. The standard of effort must view the project’s utility and value to the organization’s future.

Here, our understanding is again aided by viewing our goals as a road trip: once you reach your destination, you don’t evaporate. Nor do you touch a “base” and turn around and leave the destination. You inhabit that destination – at least for a time. You *do* something at that inhabitation. If it’s a vacation, the success of the planning and trip (the project) will not just be in the mere arrival. The success is really measured in the things that you are able to do there, and the satisfaction and enjoyment they bring. If you’ve moved to a new community, the trip and ‘project’ is to establish a new home and way of life. Is life good? Is it what you expected and are you well satisfied? In other words, you are now in your new home, and immersed in your new way of life – but *that* is not the real measure of your success. It is whether you are doing and living the way you intended when you planned and managed your change to this new life. It is the meeting of expectations, and fulfillment of needs over time, as you go about living.

Any project’s hard and fast management ends at the “arrival” of its delivery but, in essence, the project *projects* through and past the delivery to influence the organization for a long time. A project’s influence only ends when the delivered solution is subsumed or replaced by another. Viewing the project beyond its mere delivery date helps participants to focus on true value in all areas of the project - for the “living” that will go on after the hard project’s end. This helps those within the project to avoid an insular experience and to avoid a division: A loss of vision for what the actual needs and goals of the organization are - and the project’s expected contribution to those.

In the upcoming chapters there will be ideas and models that provide help beyond the three specific areas of project management we just looked at. These chapters are as self-reinforcing as your Business-Technology Weave as are your organization’s departments and disciplines to the whole of your business goals. Just as we’ve explored some areas above, and applied concepts of the Weave to them, you can bring each area of the book to bear on the others. When you begin your next project, think about all areas from the perspective of the Weave.

A WORD ABOUT TIMELINES: DOING THINGS RIGHT, RIGHT ON TIME

In discussing a major project, someone once said: “We’re not going to finish this project by a specific date, we’re going to do it *right*.” This statement was delivered with the spirit that this was an enlightened concept. However, finishing a project according to a stated expectation, and doing things right, are not mutually exclusive. In fact, if we’re speaking of a true managed project, we must operate according to a fundamental understanding: By definition, project management means *doing things right, right on schedule*.

Now of course some things are going to occasionally slip “off schedule.” But we’re speaking in reasonable terms here, and we must strive to make deliveries and achievements on time. In fact, the well-run project can do this with amazing regularity. Doing things *right* is going to come from the standards, disciplines, and accountabilities we emplace according to defined practices. These practices are established and maintained in managing any department or group of people, and are supported by Human Resources policies, standard business practice, best IT practice, and common sense. This is all part of the Weave too. Doing things *right on schedule* comes from effective project management. In order to manage cost and to make effective use of resources you must have a schedule for completion of the project, and you must manage according to the schedule.

Whether you use a project management software such as MS-Project, MS-Solomon, spreadsheets, documents, templates, other proprietary project applications, in any combination, it is also helpful to have a representation of a timeline, a summary, of the sort we’re about to examine.

FOCUS: A VERY BASIC TIMELINE

In the very early stages of your project, get a 6’ x 4’ whiteboard – one that you can dedicate to the project. The whiteboard is extremely helpful in planning the timeline early on. Later, the whiteboard serves as a snapshot of the timeline as a readily accessed, seen, and digested representation of the project status. How many times have you been involved in a project, sitting in a meeting, looking at all kinds of status reports, project timelines, spreadsheets, etc., and wondered to yourself “what the heck is really happening?” Don’t be afraid to go simple. At any time, participants should be able to look to the whiteboard see what should be happening when - on a macro scale for sure, but that is very important. You will be amazed at how this simple device keeps everyone on

track and feeling secure. Individual departments and cells of the project can have whiteboards, but here we're speaking of a "main" whiteboard for big-bullet project status. Larger organizations will have rooms that have entire walls that are whiteboards. Their projects can *use* an entire wall – but keep the main board to one wall, and depict as best you can the major milestones on *one line of time*.

If you're not able to take someone in five minute's time - a visitor, a new hire, a new vendor, etc. - from a "cold start" to a fairly solid feel for your project and its goals – *you're in trouble*.

In roughing out a timeline, pick a start date and a "go-live" date (that date by which you hope to have a new solution in place, fully implemented in your production environment, in use by users and fully supporting business). In roughing out the start and go-live dates, pick dates which make sense, but don't be too concerned with pinpoint accuracy. Early discussions within the BIT environment will yield dates that are realistic if not yet fully sanctioned. What we're looking to do is to establish the "life" of the project – that period of time under which the project will bloom and yield, delivering permanent "fruit" – the new solution. Once that proposed bracket is on that board, begin to hang some major milestones on the timeline to see where things fall. You will begin to quickly shuttle dates, sliding them forward or back along the timeline as you estimate how long things will take, and which things are dependent on other things. You'll also notice that many things can happen in parallel.

This simple, graphic depiction of the timeline is very effective in exposing the areas you can tighten up – as well as ones where you'll need to dedicate more time: You'll see where things that can happen in parallel from a strictly technical point of view can in fact not happen that way due to a stretch of staff or budget. Remember that the whiteboard is for the larger, more visible milestones – things that would be understood by the BIT team and other management, or understood with some brief explanation. Various notes and details regarding milestones can be listed under the timeline, but the timeline is not meant to exactly mirror your other management resources. Plans, reports of progress, detailed next steps, and documentation regarding requirements are contained in, and managed by, your other tools.

REMEMBER ~

Too often "improvements" are introduced, but are unwittingly applied on top of bad habits or practices that stubbornly remain – often unbeknownst to management. We need to fully understand today's "lay of the land." Changes to burdens of security, changes to management of content, changes in the speed of

markets, changes to the array of technology and its support, changing demands and expectations of consumers - *and continual, accelerating change in these regards* - means that projects will take on new requirements for proactivity, efficiency and success. Organizations, even small ones, will have an increase in concurrent projects, and in dependencies between projects. There will be a narrower and narrower tolerance for errors or sloppiness.

An organization should always be in a good position to serve any project well: by maintaining a position of change readiness; by knowing where it is; by knowing where it's going; and by knowing how to get there. Within projects, remember to expose and accurately identify needs, to define a solid project to deliver on needs, to develop sanction and sponsors for the project's protection and sale, to select a proper project manager, and to coordinate and manage through a special project team. The team may be comprised of BIT, or a part of BIT – you may be able to manage some projects as a part of BIT's agenda. But the spirit and ethic of the BIT team must apply to projects and all challenges.

All organizations should task any PM to bring fresh insights and necessary leverage to all areas of a project's management. If you are the PM, you know what to do.

