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Leadership Development Series

Project Management

Managing Successful Projects: The Trauma Center

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Executive Summary

Using This Document

This is one of a series of professional Leadership Development topics related to Project Management published by Infocept Systems, Inc. It is intended for individuals who want to understand the practical and political side of managing successful projects and complements theProjectDoctor™ series of training courses offered by Infocept. Topic areas in this document are broken down by some commonly-found project 'health symptoms', how they can be remedied and how they can be prevented.

My project is way behind schedule…

Immediate Actions

First you must sit down and understand exactly which items are late, by how much and the causes for the delays. Re-evaluate the entire project schedule and costs, including future tasks that may also be at risk for slippage. Communicate with your project sponsor immediately! Perform a self-assessment or call for an independent audit. Try and understand the basic control issues that went awry and put a Corrective Action Plan (CAP) in place to prevent delays again. You ***will*** be asked about what you are going to do to keep the project schedule from slipping any further. By the way, if the schedule has slipped, so has the cost – unless you planned for contingencies or what we call 'strategic reserve'.

Date-Driven Issues Management

A successful technique we've employed in some projects in trauma is something we call date-driven issues management. This is especially useful when we've come across a project in trouble. The technique here is to identify key project milestones and dates. We then surround each milestone with the known and *potential* issues (risks) preventing its successful completion – like little 'storm-clouds' hovering over the date. The issues are then documented, assessed for impact, prioritized and attached to the milestone by date. This technique helps sort out the real issues and priorities and *visually* identifies each issue to the milestone it is affecting, especially if the project team is in a swirl over what to focus on. We then focus the status reviews on the right issues first.

Preventative Actions

There are a number of things you can do to prevent this from happening again. These things primarily center around managing progress, expectations, requirements and tasks.

Conduct Status Reviews

Once the project gets rolling, status reviews must happen! They need to form a rhythm fulfilling a necessity to communicate vision and direction *down*, and progress and issues *up* the project organization. A typical sequence is to have sub-project reviews on Mondays, Project Reviews on Tuesdays, Management Reviews (if necessary) on Wednesdays, and Steering Committee meetings monthly on a standing basis and with a standing agenda. The reviews can take on a standard look and feel so you don't re-invent the status summaries every week. Avoid wordy word-document status reports; get people in a room once a week, have them share information and have them look each other in the eyes.

Prevent and Manage Late Task Completions

The best technique here is to break up tasks into small milestones so you can test for progress in smaller chunks. Instead of having a 6-month task for software development, break it into a 2-month task for design, 2-months for code, and 2-months for test. This way you can spot unfavorable trends early. Also, since most delays in tasks are caused by issues and indecision, make sure you (and your team) stay on top of issues and their impact on getting tasks accomplished on time - use date-driven issues management. Another contributor to late completions is *late starts*! Make sure that you also review tasks that should be starting to make ensure a timely completion. Scheduling products such as MSProject, TurboProject and Palm-Pilot software such as Project@Hand can also assist in managing project tasks. The choice is up to you.

Manage Scope Definition / Scope Creep

Begin using the Change Control Board (CCB) process on day-1. This will provide a forum for managing new / changed requirements, discussing priorities, and evaluating impacts to costs and schedule. All scope issues should be forwarded to the Management Change Board and/or Steering Committee for approval *prior to starting any work*. This way, you can make sure you have relief from costs and schedules before making any commitments to the requestor.

Manage Issues & Indecision

Again, the best forum is the CCB, with definitive DUE DATES on decisions required and impacts determined. Then, begin the escalation process to the MCB and Steering Committee. Make sure leadership knows the implications / importance of getting a decision when needed! Using our technique for date-driven issues management can also help here – before it's too late!

Utilize Project Diagnostics

Utilize project diagnostics and health indicators early on and throughout the project to serve as early warnings of project issues.

- Diagnostics aid in managing complex, diverse projects
- These are key indicators of performance - gets to the bottom line!
- They become early-warning signals for potential problems
- They give you reaction time to address issues

My project is costing more than we thought…

Immediate Actions

First you must sit down and understand exactly which items are driving the cost overruns (labor, software, overtime, hardware, etc.), by how much and the causes for the overruns. Re-evaluate the entire project schedule and costs, including future tasks and issues that may also be at risk for overruns. Communicate with your project sponsor immediately! Perform a self-assessment or call for an independent audit. Try and understand the basic control issues that went awry and put a Corrective Action Plan (CAP) in place to prevent delays again. You ***will*** be asked about what you are going to do to keep the project costs from growing any further!

Preventative Actions

Conduct status reviews often, and focus on issues that could potentially result in cost overruns. Utilize the entire spectrum of project management techniques that we recommend (task management, change control / issues management, status reviews, risk assessment, project diagnostics, etc.). Make sure leadership knows the implications and importance of potential risk areas. Communicate early – even if it's just a gut-feel that something is tending to fall into an overrun situation.

Project issues are way out of control…

Immediate Actions

Immediately take inventory of your issues. Try to assign them to the milestones they are affecting so that you can assess and assign priorities. Use theprojectdoctor™ technique of date-driven issues management.

Preventative Actions

Utilize the change control / issues management process from day-1. Use the issues forms and log to track issues as they come up. Assign responsibilities and due-dates. Again, the best forum is the CCB, with definitive DUE DATES on decisions required and impacts determined. Then, begin the escalation process to the MCB and Steering Committee. Make sure leadership knows the implications / importance of getting a decision when needed! Also try this proven technique from theprojectdoctor™:

Technique: Manage Risk Wisely!

Issues were future risks that went bad and are now ***problems***! Try to constantly keep up your antennas regarding things that can go wrong. List the items that worry you about the project (risks) and then formulate a plan (mitigation) to monitor and contain each potential issue. Also formulate a "plan-b" (contingency) if your worst nightmare comes true about the potential issue. What do you do now? The key here is to constantly poll for potential issues, and put a plan in place to deal with them - even if the worst happens. This way, you've thought out all the consequences in dealing with the potential issue and won't waste important decision-making time when or if the potential issue becomes real.

How do I respond to a project audit?

Immediate Actions

First, get the facts. Sit down with the auditor and understand the deficiencies noted. Immediately take inventory of your issues. Work with the auditor to construct a corrective action plan (CAP) to address the immediate deficiencies. A CAP is way to note the deficiency, assign priority, timeframes, determine how you are going to fix the immediate problem ***and prevent*** it from happening again. Work with the auditor on the specific requirements by deficiency.

Preventative Actions

Get an auditor assigned to your project from the beginning! Have him be part of the team and continuously monitor your progress. A word of his occasional advice may prevent a future audit finding. Then do the basics - conduct status reviews often, and focus on issues that could potentially result in cost overruns. Utilize the entire spectrum of project management techniques that we recommend (task management, change control / issues management, status reviews, risk assessment, project diagnostics, etc.). Make sure leadership knows the implications and importance of potential risk areas. Communicate early – even if it's just a gut-feel that something is tending to go wrong.

I've been asked to re-justify the project…

Immediate Actions

Someone is obviously questioning the benefits that the project will deliver. Seek out the person / issue and get to the root cause. Remember that somewhere along the line, the project ***needs*** to save direct/indirect costs, improve quality, increase speed, improve productivity or do some combination thereof. Savings may also include intangible items such as improving customer satisfaction or potential revenue or market share increases. All of these taken together form the project ***justification***. For some reason your project is on someone's radar screen, or maybe there are now other business issues taking priority.

Preventative Actions

Project duration is often very long and delivery of savings most always comes towards the end of the project. In addition, most people measure project success by the budget-under runs and earlier-than-planned schedule completions. Wrong! Remember the Business Case and the defining reasons for implementing your project? Well, as a project manager, you need to keep those in mind. theProjectDoctor™ also recommends the following treatments:

Use the 'Quick-Win' Technique

At every opportunity, sell your successes and their connections to the original project justifications, even if they are small steps towards the bigger picture. A good technique here for long projects is the "Quick-Win" - a small deliverable (or series of deliverables) that keep interest alive in your project by delivering small benefits along the way. Keep track of the 'goodness' items - in real business terms; make a list because people tend to forget why your project is in business and will always question what you accomplished.

Implementing new Information Technology Systems has reached the complexity, costs and expectations that make the stakes too high for failure. The investment being made demands outstanding results… and fast. Your project cannot drop out of the limelight. Your success, your team's morale and yes, your budget - rely on "internal public relations".

- You need to build in "Quick Wins" along the way.
- You need to ensure that project communications are consistent and candid.
- You need to make sure that your funding is secure (***almost daily!***) for the duration of your project plan.

Marketing: Have a Project Communications Strategy

A communication strategy deals with meeting rhythm and content downward to the team (status reviews, CCBs, etc) and communications upwardly to the sponsors (MCB; steering committee meetings, functional staff meetings, etc.). Also communicate often and personally to other stakeholders and influential parties - lay out a strategy to ***continuously market*** the project. Take any opportunity to sell the project. Your communications strategy should also include monthly status reports, communications, newsletters, articles in the company news media, presentations to top management, peers and adjacent organizations impacted, etc.

Deal Squarely With the Politics

This issue is almost never discussed as a Critical Success Factor for projects, but is real and must be dealt with. Politics is based on dealing squarely with fact and obliquely with emotion. Project politics is divided into defensive and offensive modes. The defensive mode is used in response to an issue that someone “puts out there” for you to defend - it could be a person threatened by the project, a hero blowing ill words in some ones ear, or a bad situation (project slippage, overruns, etc.). These items must be dealt with fact first, and then the emotion. The offensive politics strategy uses preemptive communications, education, personal touch, trading favors or whatever to build confidence and trust in you and your project. So even if the bad stuff happens - and it will, you’ll be ahead of the political curve a bit. Work the room like it’s a performance.

We can’t seem to keep the talent we need…

Immediate Actions

Stop the bleeding; find out why people are leaving and put plans in place to immediately address the issues. Despite management enthusiasm for your project, you will also need to lobby hard to get the best people. Use the project sponsors and Steering Committee to assist with this issue. They may be able to work the politics from a different direction.

Preventative Actions

Most projects consist of a team of people from various departments in the business who are unfamiliar with the process and challenges of managing the technology, tasks and people issues that will exist as the program progresses. What is the right number of people? What areas must be represented? What defines an effective team member? Is there the potential for undermining? Remember, managers may not always "hand over" their top employees for an extended project outside of their departments. You need to take inventory of your project team against the skills and roles required and ensure you have the proper level of resources, the right skills and the necessary time commitments from the team members. The steering committee is a great forum to address these issues and obtain the necessary commitment from the business for the resources you need. However, ***you have to be specific and clear*** about the roles and the time commitments (intensity and duration) required from the resources you are asking for.

Motivation, Recognition and Reward

Remember that the project team is an ad-hoc collection of diverse individuals, ripped away from their comfy jobs and brought together for the purpose of completing a thankless job of implementing and transitioning your project into reality. How well you motivate depends on your personality, personal style and passion in the belief of your project. People will follow your lead, but you have to lead! Reward often, even if small awards. The value of the reward to the individual and team is in the message of what you're doing, not the actual cash value awarded. Also make sure that individual's real manager knows the good (or bad) job the person is doing so that appropriate adjustments can be made to annual performance and salary reviews. Also remember to reward for Team behavior; individual rewards are OK, but remember that you don't want heroes, you want a ***Team.***

The Project sponsor was just replaced…

Immediate Actions

Bummer. You probably will need to re-educate the new sponsor. Get your act together – project plans, costs, status, risks, etc. Expect to do a full-blown project review for the new watch-commander. Understand the politics. Expect to dig-up all the old justification material in the original business case – expect that everything may get questioned again.

Preventative Actions

There isn't much you can do to prevent this – unless your project precipitated the removal – in which case you should be updating ***your*** resume! If that's the case, then you should have called theprojectdoctor earlier! Nonetheless, people do move on for a variety of reasons. Use this as an opportunity to re-sell the project.

Play the project's strengths and communicate the issues. This could be an opportunity to breathe some fresh perspectives into the project. Good Luck!

I'm implementing 3rd party software…

Third-Party packages (SAP, Oracle, Baan, PeopleSoft, etc.) usually have their own form of an implementation methodology. Unfortunately, most companies rely on consultants that may have good functional and technical knowledge of the application but are clueless as to how to lead or participate on a project team, motivate the client and deal with issues. In many cases the consultants will not even follow the implementation methodology for their product, or the process followed does not include the appropriate quality checkpoints.

Other issues that arise are the poor definition of roles and responsibilities among the company and the consultants, confusion on specific deliverables and expected quality, lack of an issues management process and project structure, poorly coordinated schedules, etc. This situation is ***especially*** aggravated if the company that is installing the software never even had a good project management methodology for their legacy applications to start with!

The solutions? Hopefully you will find a consultant who can not just help manage the immediate project for you, but who can also teach you the right project management methods. Or? You guessed it…. give us a call and ***we*** can assist you for a lot less money than the Big consulting firms!

How do e-business projects differ from normal IT Projects…

This question actually relates to two different issues. Let's take them one at a time:

Web Development Projects – For a traditional IT development shop, web development (web pages, web sites, access to production info via web browser, etc.) is very similar and yet very different from traditional client/server or mainframe projects.

The process of project management is similar to traditional application development and quality control. However, the process is more user-collaborative and faster (rapid prototyping). The development includes a graphic design (look and feel) component that must be appealing to the user. Hardware / network integration from the start is crucial and prolonged stress testing is a ***must*** – if the users can't get adequate response time, you're dead. Witness the Obama-Care website fiasco in 2014.

It is essential that business process and user documentation is integrated earlier in the cycle because your web site/page should have instant access to express and tutorial user guides, contacts, glossary of terms, feedback and some information about the business process being accessed. As an example, if you're giving a user web access to a physical inventory update application, also include the corporate guidelines for inventory classification, cycle count procedures, spoilage reporting, etc. In essence, the web application should give the user benefit of the ***full experience*** of dealing with not only the 'system', but also the ***business process***!

We actually have a training course called **Managing E-Business Initiatives** that explains these staffing and process issues in greater detail and guides you through a typical project plan for web development.

E-Commerce - E-Commerce projects differ from typical application development projects in a number of ways. E-Commerce projects may be hosted and developed completely outside the IT organization. As an example, internet procurement for a company may be nothing more than access to a trading partner web site or marketplace/exchange that manages all the company's catalogs and purchases. In this case, integration of the trading partner's system with the company's back-office systems (eg., Accounts Payable, Order Entry) and user training may be all that's required. Each E-Commerce project is completely unique based upon the 'nature of the deal' and hosting environments between the trading partner, the company, suppliers, marketing channels, etc. The politics and trusted relationships between and among the trading partners are often the largest impediment in successful B2B projects.

About Infocept Systems, Inc.

Who We Are

Infocept Systems, Inc. is a professional services consulting company providing business and technology strategies, solutions and services that help your business grow profitably. We passionately believe that innovative use of the right information technology and related processes in your business or institution are essential to increasing revenue, increasing consumer engagement, reducing costs and ensuring mission success. With our extensive industry and consulting experience in working with Fortune 50 companies, we can partner with you to rapidly assess, design and implement the right IT solution to improve your margin and competitive posture to *make your business thrive!*

Our Qualifications

Our credentials and work experiences in consumer-facing, operational management and supply chain systems & best practices span a variety of municipal government, manufacturing, retail, managed-services industries and non-profit institutions. We have extensive experience in business transformation, information technology and large project management within those business segments. Our clients have included such noted agencies, companies and institutions such as the City of New York Office of Management & Budget, GE, Lockheed Martin, KPMG, Panasonic, Lehigh Cement, World Airways, Canam Steel, JE Morgan Mills, ARCO Chemical, Allen Organ, Philadelphia Gear, Aramark Corporation and most recently, the American Bible Society and others.