

Facilitating your way to project success

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The enterprise-wide project you've been leading has been declared "a complete success" by your business sponsors. End-users report they've never experienced such a leap in productivity and quality in such a short time. You've helped your manager become a hero in the eyes of the CFO: Not only is your project on time, but you've managed to deliver the promised results at 80% of budgeted cost. Your competition orders a top-notch headhunting firm to "offer whatever it takes" to lure you over to their side so you can duplicate your astounding success.

For most project managers, this scenario might sound like science fiction. But it doesn't have to.

In this article, we explore four leading project "time-wasters" and discuss how they can be avoided through the use of facilitated workshops with key team members and sponsors. We also offer a checklist to help project managers make the most out of facilitated team communications. Finally, we provide guidelines to help identify who might be in the best position to facilitate, what skills are required, and when outside help may be needed.

The unique demands of a large-scale IT project

Few organizations within a typical company can compete with IT for missing deadlines so reliably, and with such prominence. Is it that the IT profession simply draws those with exceptionally poor time management skills? Or that a badge of honor for IT project managers is awarded for setting particularly unrealistic delivery dates? Or do IT managers just enjoy being heckled by disgruntled end-users?

In fact, IT managers are probably no more or less inherently efficient than their business counterparts. Nor is their ability to realistically estimate time or keep track of costs any less well honed. Rather, it is the very nature of large-scale IT projects that makes it so difficult to continually meet deadlines, work within budget constraints, and please business sponsors:

- Many enterprise-wide IT projects are seen by business managers as a panacea to solve a critical business problem—creating a heightened sense of urgency and pressure
- IT projects tend to run in the double-digit millions of dollars, thus commanding particularly close scrutiny and criticism
- Business sponsors often lack an understanding of realistic timeframes and resource requirements, particularly when they insist on making changes mid-stream
- A shortage of IT talent often means that several business units within a company compete fiercely for available resources, with no corporate-wide process for setting IT investment priorities
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- IT organizations and their business counterparts often have an uneasy partnership, where they find it difficult to understand how they can best collaborate for mutual success

Four leading project “sink holes”

Most time wasted on IT projects can be traced to four major reasons:

- Vague or conflicting project definition and scope
- Lack of clearly-articulated expectations
- Competing (and shifting) priorities
- No process established for problem resolution and feedback

Through careful planning and clear and continuous communications, these tripwires can usually be avoided. At worst, they can be quickly overcome with minimal damage.

The secret? Facilitated workshops where team members and business sponsors can openly hash out differences, identify potential conflicts, and agree on key aspects such as project scope, deliverables and dependencies.

In the pages that follow, you’ll read about a major project underway at Cenemex, a fictitious company that is about to roll out a new enterprise resource planning (ERP) application affecting all 5,000 employees in 16 countries.

Kicking off the project with a bang

Like so many other major IT projects, the Cenemex ERP project falls prey to every single one of the four “favorite” leading project time-wasters. We will first see the project as it unfolds without the benefit of facilitated sessions. Then we’ll explore how facilitated working sessions can help keep the project firmly on track as Dave organizes and delivers a much-needed “Project Recovery Workshop.”

Dave Doyle, ERP project manager, has been with Cenemex for five years, all of it in Corporate IT. He has earned the respect of CIO Belinda King, a fast-track executive who’s been with the company just under two years. Belinda knows that a successful outcome of this ERP project will place her firmly in the running for an executive VP slot within the next 18 months.

Of the 14 full-time corporate IT project team members, about half are highly technical and work independently on most projects. The other half is split roughly between seasoned project managers and individual contributors who spend most of their time as part of project teams. In addition to the core team members, another eight to 12 field IT professionals make up the “extended” team.

The project, slated to last between 18 and 24 months, has been blessed by the executive committee, who have high hopes that a successful ERP will provide the competitive advantages they need to sustain profitability. Belinda had persuaded them that for a \$22M investment,

Cenemex could expect to see dramatic reductions in manufacturing and distribution costs, significant increases in revenue, and a 50% decrease in the “time to order” to “time to cash.”

With help from Belinda and one of the more senior project team members, Dave pulls together a two-day project kick-off meeting. His overall objective: To get the project off to a smooth start by agreeing on fundamentals such as project goals, scope, roles and responsibilities, and critical success factors. He’d also like to use this off-site session as an opportunity for team-building, given that some of the team members have not worked well together in the past.

Included are the core team members, four of the remote IT team members, and two consultants from the systems integration company that will participate in the early stages of the project.

Time Waster #1: Vague or conflicting project definition and scope

Once Belinda rallies the troops with a rousing introduction, she leaves Dave to run the rest of the meeting. After leading group introductions and making welcoming comments, Dave gets down to business by reviewing the project definition and scope. This part, he had guessed, would be the easiest. After all, everyone had received a copy of the project plan proposal that Belinda had presented to the executive committee.

The 15 minutes that he has mentally allotted to this part soon expands into a heated three-hour discussion. Among the questions that emerge (one often over another): How was this related to other past and current projects? How could an ERP application really deliver the kind of benefits quantified in Belinda’s proposal? Wasn’t this project going to be just like the one that poor Joe tried to launch a couple of years ago (the one that cost him his job)? Who determined when the project would be “complete”? Is this scope realistic for this group to achieve in the agreed-upon timeframe?

After allowing this conversation to run on through lunchtime, Dave throws up his hands and asserts that the scope as written in the project proposal was the one they were going to live with. End of story. As they break for lunch, team members express varying degrees of frustration, confusion, anger and resignation. Most leave feeling that their questions and concerns had gone unheard, and that they will have far less influence in the project than they had hoped.

Among the likely results: Team members will tune out the rest of the meeting. Most are likely to disengage from the project before it starts. Without a clear agreement as to what the project will accomplish or include, the scope will continually expand and contract, wreaking havoc with the schedule, leaving team members vulnerable to accusations of slipped deadlines and missed expectations. Changes will be requested, and without criteria as to what belongs and what doesn’t, the project is likely to grind to a halt at several junctures along the way

Time-waster #2: Lack of clearly-articulated expectations

Two months after the now-infamous kick-off meeting, Dave feels that despite a rocky start, the project seems to be running pretty smoothly. Few people have aired any issues at the bi-weekly

team meetings and even fewer have reported any problems to him. Most team members say they are on target to meet agreed-upon milestones.

One day, as he was passing through the cafeteria, he catches wind of a spirited conversation a few team members are having at a table in a far corner. He is stunned by what he hears:

- *“My deliverables are complete for this month. Now I can take it easy for the next week or two...”*
- *“How can you say that? I’m depending on you to complete a whole host of other deliverables before I can make any progress. You’re not even close to finishing!”*
- *“Hey, no one ever told me I was responsible for those things. As far as I am concerned, someone else is doing all of that.”*
- *“Well, who do you think is working on it?”*
- *“To tell you the truth, I don’t know. Ask me I care.”*
- *“You know something? I don’t think any of us really knows exactly what the other one is doing. Wouldn’t you think that Dave would be concerned?”*
- *“Nah. He’s just happy he can tell Belinda that everything is going just fine. I think the guy’s oblivious to what we’re really doing—or not doing.”*

His knees turning to jelly, Dave makes his way back to his office and does a quick calculation of how much time has been lost with team members waiting on missed deliverables, which are apparently not on *anyone’s* radar screen. Then he realizes that this cafeteria conversation included only three project team members. Would he have to multiply the time lost by three or four, if all members feel the same way?

Time-waster #3: Competing priorities

As the project chugs along in fits and spurts, more demands are placed on team members as business priorities change. In some cases, the business sponsor for the ERP project is adding new requirements to list that’s now so long, the project time could literally double as a result. Since no one has said anything to the contrary, the business sponsor is fully expecting all requirements to be fulfilled.

At the same time, business sponsors of other projects are complaining loudly that their needs are going unmet. They insist on stealing “just a little” time from ERP project team members to get their own projects on track. Because the ERP project team is “virtual” in nature, many members actually report directly to the business units that fund them. They agree to devote some time to their business units over the coming months. In most cases these agreements are tacit. Dave is unaware that he has lost up to a day a week from many key team members.

When Belinda asks Dave for a project update, he confesses that they are way behind schedule. When pressed for a reason, Dave scratches his head. He allows that the project scope has

expanded somewhat, but that none of his team members had raised any red flags as a result. He also acknowledges that some of his team members may be spending time on other projects, but he thought this time was negligible.

Belinda keep her anger in check as she suggests to Dave that he and the team regroup immediately and pinpoint all problems that are causing these delays and develop action plans to solve these problems. She wants a report by the end of the week.

Time-waster #4: No processes or tools for problem resolution

Dave calls an emergency team meeting that afternoon. A few of the team members are off-site with their business managers. He begins by blowing off some pent-up steam, which takes the team by surprise. After all, Dave has not voiced any concern about the schedule slips so far. Posting the original project schedule on the wall, he uses red ink to show how far they were from their milestones. He turns to the team and asks them why they thought they had fallen so badly behind.

He hears a chorus of replies:

- *“The scope kept changing and we never knew when to say ‘no’”*
- *“We had different ideas about who does what, and some things haven’t been getting done”*
- *“The guy I report into had some really critical problems only I could help solve”*
- *“We figured you didn’t have a problem with what we were doing”*

Dave is once again shocked by what he hears. He realizes his team members are right and that he needs to quickly demonstrate leadership.

“Okay,” he says. “I am sorry I didn’t hear you long before this. We haven’t had great communications and I accept responsibility for that. Now, how can we work together to get this project going back in the right direction? I have promised that I would give Belinda an action plan for getting on track by the end of the week. Now, who has some ideas?”

Team members look around the table. Some shrug. Others blink. None know how bullish they can be in making recommendations. The team has never established precedence for surfacing or tackling problems. All wait for Dave to take the lead. And he waits for someone else.

Sidebar: How facilitated sessions can avert project sinkholes

Can a single facilitated session, even if executed superbly, help overcome all of these project time-wasters? Probably not. But if planned and implemented thoughtfully, a “project jump-start” session, combined with ongoing facilitated meetings, can address many of these issues before they have a chance to grow into full-blown problems.

Why is a facilitated session so important? A facilitated session:

- Establishes a structured, formal forum for two-way communications
- Accelerates problem resolution and clarifies likely areas of confusion up front
- Provides an environment where all team members can contribute ideas and raise questions
- Ensures that the team meets critical objectives in the allotted time
- Session output serves as a communication vehicle to inform all interested project stakeholders

“Recovery Workshop” gets project back on track

Dave knows he needs to act fast to save the project—and quite possibly, his career—from imminent disaster. He calls for a two-day emergency session starting tomorrow at 8 AM sharp and adjourns the meeting to prepare.

He enlists the help of Sally McGuire, an ace facilitator from Human Resources, who drops everything to bail out Dave, an old friend who’s helped her in the past.

Together, they review the steps Dave needs to take, along with the intended outcome. Given the urgent nature of Dave’s “Project Recovery Workshop,” he must compress these steps into just a few hours, rather than the few days that would typically be needed.

- Dave meets informally with a few key team members and solicits their input as to what elements they consider most critical for a successful project recovery workshop. Based on these conversations, Dave creates a draft agenda (*see related exhibit on page X*).
- He sits down with Belinda and with the key business sponsor for the ERP project and works with them to map out an executive project overview document (*see related exhibit on page X*), ensuring that they agree with the workshop objectives and the agenda. Dave secures their commitment to kick off the session, reviewing key points and assigning each a precise time slot.
- Based on the objectives, Dave realizes that he should include not only the core team members and all remote team members, but also one or two representatives from key business units. He also realizes that because he himself must contribute fully to the discussions, he needs a skilled facilitator to keep the meeting on track and ensure that objectives are met. Sally has

already agreed to perform this role. He also needs a document manager whose job is to capture and communicate all workshop output. Dave taps a newly-minted junior project leader for the task.

- ☑ Dave sends each participant an e-mail, which includes the workshop overview document as well as a personal message, underscoring how important this workshop will be to the success of the project. This session will also set the stage for more such sessions as an important forum for ongoing communication. He attaches the project proposal Belinda had created for the executive committee, as well as a memo from the CEO, discussing how vital this project is for the company's success.
- ☑ Dave asks his administrative assistant to arrange for a comfortable working space removed from the office, with plenty of light, a U-shaped table, lots of flip charts and wall space, and adjustable temperature settings. His assistant also arranges for copies of all needed documents and audiovisual equipment and supplies.
- ☑ At 8 AM the next day, Dave welcomes the team and relaxes perceptibly as Belinda and the business sponsor kick off the day with an inspiring vision of what Cenemex can become with the new ERP application. Looking around the room at his newly-energized team, Dave knows that he count on Sally to capitalize on the momentum and lead the team on the first step of a successful recovery.

Summary

Even the most well-planned project can be derailed. Sometimes the factors lie beyond the ability of the project team to control, such as a sudden downsizing of budget or staff, or a last-minute “critical” business requirement that *must* be accommodated.

But just as often, project derailments can be avoided by the project team. One key: a facilitated launch workshop where members reach consensus of vital project elements, such as scope, responsibilities, problem-solving process, dependencies and risks, and process for managing changes. This way, all team members quickly reach a shared understanding of the desired end state, as well as the “journey” they will be taking together to get there. Issues can be deflected and areas of confusion can be resolved. This kick-off session models the kind of open communications forum the team can expect to partake in for the duration of the project.

Such facilitated sessions should not begin and end with the project kick-off. (And with good planning and open communications, a “recovery workshop” should not be needed.) Many project team meetings would benefit from facilitated sessions, especially when problems need to be resolved, team-wide commitment or agreement is needed, or well-informed decisions must be made quickly.

A relatively small amount of time allocated early in the project lifecycle can pay huge dividends later. Establishing structured, facilitated workshops helps ensure that team members work interactively and build shared comprehension and commitment throughout the project.

With the appropriate people, tools and processes in place, project management can actually be fun. Team members and the project manager will gain confidence, enhance their professional reputations, and deliver results that actually make a difference.

Sidebar: How to select a facilitator

Not just anyone can pull off the successful facilitation of an IT project kick-off. Important qualities and attributes include:

- Trained and skilled in group facilitation techniques
- Seen as impartial and not vested in outcome of session
- Regarded as able to lead all team members fairly
- Excellent communications skills—particularly listening and paraphrasing
- Is politically “wise”
- Plays a dedicated role
- Has time to adequately prepare; is not “added in” at the last moment
- Can effectively deal with tough issues likely to arise
- Understands when digression from agenda is likely to produce positive results

Sidebar: When to bring in an external facilitator

- No one on the team is regarded as neutral and able to demonstrate impartiality
- Project team members all need to participate fully in the working session
- Issues are likely to be contentious and will require an expert who can deflect problems and keep the group focuses
- A sense of urgency makes it imperative that sessions are planned and delivered rapidly
- Recognition that a trained facilitator can get more out of the team than any existing members

Exhibit one: Recovery Workshop Agenda

AGENDA FOR DAY ONE

- 8.00am Continental Breakfast
- 8.30 Introductions / Overview / Agenda
- 8.45 Kick-off by Executive Sponsors
- 9.00 TEAM NORMS (Establish rules of conduct for the team)
- 9.30 PROJECT DEFINITION (Non-negotiable factors: define Charter, Scope, Exclusions)
- 10.30 Break
- 10.45 REALITY CHECK - evaluate existing plan
 - 1. Completed
 - 2. Underway but not complete
 - 3. Underway and in jeopardy
 - 4. Not started
 - 5. "Major concerns"
- 12.15 Lunch
- 1.00pm REVISED PROJECT PLAN
 - 1. Project charter, scope and phases
 - 2. Schedule and key deliverables
 - 3. Dependencies and/or competing priorities
- 2.30 Break
 - 4. Team roles and responsibilities
 - 5. Priority-setting mechanism
 - 6. Executive Committee project involvement
- 4.50 SUMMARY and FEEDBACK
- 5.00 Close

AGENDA FOR DAY TWO

- 8.00am Continental Breakfast
- 8.30 REVIEW MATERIALS FROM DAY ONE (Confirm and edit the document)
- 9.30 CRITICAL SUCCESS FACTORS
- 10.00 Break
- 10.15 CONTINGENCY PLANNING
- 11.15 COMMUNICATION PLAN
 - (a) Project team
 - (b) Executive Committee
- 12.15 Lunch
- 1.00pm
 - (c) Business Units
 - (d) External Stakeholders
- 2.30 Break
- 2.45 PROBLEM-RESOLUTION PROCESS
- 3.15 ACTION PLAN
 - next 30 days
 - next 60 days
- 4.00 WORKSHOP REVIEW - Log any Action items and prepare summary
- 4.30 PRESENTATION TO EXECUTIVE SPONSOR(S)
- 4.50 Feedback and acknowledgments
- 5.00 Close

Exhibit two: Workshop Overview Document

RECOVERY WORKSHOP

PURPOSE: To evaluate the current ERP Project environment and build a revised project plan and processes to ensure successful completion

SCOPE :

- Team members
- Project definition - non-definition factors
- Reality check (Where are we now ?)
- Revised Project Plan
 - Schedule and deliverables
 - Dependencies
 - Roles and Responsibilities
 - Priority setting mechanism
 - Executive Committee involvement
- Critical Success Factors
- Contingency Plan
- Communication Plan
 - (A) Within the Project Team
 - (B) For Executive Committee
 - (C) To Business Units
 - (D) To External Stakeholders
- Problem-resolution process
- Next Steps (Action plan for 30 days and 60 days)

- Exclusions :
 - War Stories
 - References to specific individuals

DELIVERABLES

- Every member of the team will contribute to and agree to support the Revised Project Plan.
- Each individual on the Project team will know how key processes are to be managed (such as priority setting, contingency planning, communication, problem-resolution)
- There will be a clear Action Plan to move forward from this session

ASSUMPTIONS

- The Project deadline is fixed, no further time extension is possible.
- The current budget is approved, the Revised Project Plan is not expected to increase the cost of implementing ERP.
- The selected vendor is contracted to deliver the product, no alternatives will be considered.
- The skills required to complete this project exist in the current team members.

TEAM MEMBERS

Dave Doyle
14 full time team members
6 of the “extended” IT Professionals
1 Vendor rep
2 Business reps (HR and Marketing)
1 Document Manager
1 (trained and experienced) Facilitator

Sidebar: Steps to Workshop Success

Step	Outcome
Secure the commitment of executive sponsors, both within IT and with the business side	<ul style="list-style-type: none"> • Sponsors more likely to personally participate at appropriate intervals • Visible management support engenders enthusiastic participation
Involve at least a few team members in the creation of the workshop agenda	<ul style="list-style-type: none"> • Identifies issues that may have been missed • Fosters a greater sense of commitment to the workshop results
Communicate how and why facilitated sessions will play a critical role in the success of the project	<ul style="list-style-type: none"> • Establishes facilitated sessions as important components of a successful project • Sets expectations that everyone will make time to contribute
Identify and invite participants and include representative example of stakeholder groups that lie outside of the project team, such as business sponsors, HR and/or Marketing.	<ul style="list-style-type: none"> • Diverse perspectives can enrich results • Up-front involvement can secure early commitment from important supporters
Create and distribute a preparation package (executive project overview document), which includes workshop objectives, scope, a carefully-timed agenda and expected deliverables—along with any pre-reading that will increase the value of face-to-face meeting time	<ul style="list-style-type: none"> • Sets realistic expectations • Members can more fully contribute to all conversations • Provides chance to re-validate participant list
Assign dedicated roles for each workshop: facilitator and document manager	<ul style="list-style-type: none"> • Ensures that objectives are met in timeframe allotted • Output will be made available for immediate distribution
Arrange for logistics conducive to creating an open, supportive environment (e.g. space, refreshments, ambiance)	<ul style="list-style-type: none"> • A team that's comfortable and well-fed is more likely to contribute to the best of its ability