

Teamwork Puts a Troubled Team Back on Track

By Nancy Settle-Murphy, Guided Insights

Please note: All company and individual names have been changed for this article.

In this article, we follow a project team that leapt out of the starting gate with energy, enthusiasm, and the desire to excel. Mid-way through this critical project, the customer, Tiger Express, turns over most of its IT operations to a third-party, Genorex. A new project manager is appointed, who calls a halt to the communications activities that had been so important to the early success of the project. The dearth of communications breeds distrust, fear, suspicion, and doubt. The project that began with such promise a few months ago suddenly skids off the tracks.

Only a concerted and courageous push to re-open channels of communications, both amongst the core team and with the extended stakeholder community, gets the project back on track for a successful finish, against all odds.

The key to success? The up-front investment in activities and programs designed to create trust, cultivate strong relationships, and ultimately, to build a strong team that can withstand even the greatest adversity. The activities and interventions undertaken by the team leaders form the centerpiece of this article.

Tim smiled and nodded while Greg talked, but he couldn't hear a word his customer was saying. His head echoed with the sound of the bomb Greg just dropped. Tim was the project manager for Centuria, and the planning and development phase of the IT project he was leading at Tiger Express Corporation (TEC) was nearing completion. He felt good about the momentum they were building heading into the implementation phase.

Tim was at lunch with Greg, the project's key sponsor, for their bi-weekly "informal" project review, when that good feeling vanished. Greg told Tim that his firm had decided to outsource the entire IT function. Greg would no longer be directly responsible for overseeing the work that Tim's firm was doing; it would now be up to the outsourcing firm, Genorex. Tim suddenly realized that the time and money that he had invested in nurturing good relationships with Greg and other TEC managers around the world – the very steps he took to get the project off to such a smooth start - would be useless now that these managers were pushed out of the picture.

Greg kept talking, but Tim never heard what he was saying. He sat numbly, still smiling and nodding, certain that all of his carefully wrought plans would crumble and turn to dust.

TEC, a global financial services company based in Minneapolis, is in the process of implementing a new messaging system for all 35,000 employees in 76 locations. Time is of the essence; the current messaging system will no longer be supported within the next 12 months. TEC's CEO is an ardent and vocal supporter of the new system, known as "Enterprise Express,"



or “EE.” He has publicly declared that “this new system will enable TEC to collaborate in ways that are sure to make us more competitive, and to contribute significantly to our bottom line.”

TEC’s Corporate IT (CIT) group has hired Centuria, a well-regarded professional services firm, to work with its staff to plan, design and implement the new system. The project begins with great promise in July, thanks to some of the “best practices” Centuria’s project manager (PM), Tim Whalen, has employed.

The project is in full swing in mid-December. TEC’s CIT director, Greg Hanes, is happy with the work of the team. Project members are proud of the work they’ve done, and feel appreciated and motivated to continue at the same hectic pace until the project is complete, despite the aggressive schedule. TEC’s field IT community, normally skeptical and distrustful of anything “being driven down to us by Corporate” gives the EE project team rave reviews for fulfilling stated commitments, and for its candor about what can and cannot be achieved with certain timelines.

This rare praise from the normally skeptical field IT managers is no accident. One of the “best practices” that Tim employed was to listen aggressively to what he heard from Greg and others at TEC. He was curious about the reason why there was so little standardization among TEC’s global business units and kept asking “why” until he was satisfied he understood the reasons for this anomaly in an otherwise well-run organization.

Tim discovered that the lack of standards and the distrust of central IT were related. Past projects designed to deliver common business support tools had failed, for fairly classic reasons. They were under funded, they were usually led by technical managers who didn’t understand modern project management techniques, and they were planned with virtually no input from field IT staffers.

Tim assessed these risks as they related to the current project. He knew that the high-visibility Enterprise Express project had the financial backing it needed to succeed. He knew he could rely on Centuria’s proven project management methodology to guide the work. But he was worried about gaining the acceptance and support of field managers. He saw an opportunity to expand part of the planning work to include a greater focus on communication with the field IT managers. What he learned helped him shape the future activities to make the field IT managers part of the project, not victims of it.

Then, out of the blue, Greg informs the team that TEC’s parent company, Lyons LLC, will outsource all IT operations to Generex Corp. beginning January 1. Suddenly, the project is in turmoil. Many TEC employees become Generex employees virtually overnight. Many others quit; more are terminated. Jane Johnson, TEC’s EE project manager, leaves for the parent company’s corporate IT group, and is not replaced for several months.

Lyons’ CIO has not yet formalized roles and responsibilities between TEC and Generex at a corporate level. The contract with Generex was negotiated at a high level, by people who didn’t understand Centuria’s role as integrator. The contract is vague and ambiguous as relates to the EE project, but seems to give Generex full responsibility for EE. However, TEC makes it clear they will not terminate the agreement with Centuria. This leaves both Generex and Centuria with contracts to do the exact same work, with no direction as to which organization is in a leadership role. No one on the EE project team has a clear understanding who is accountable for what, and

who reports to whom. Still, under Tim's leadership, the project continues to make progress, overcoming many formidable roadblocks.

In late March, GenereX finally announces that Ginger Barr will be the new PM taking the helm of the EE project. At the same time, Lenny Waters is appointed as TEC's PM, filling the vacancy left by Jane months ago.

No one is clear who is to be the ultimate arbiter of project decisions—Lenny, Ginger or Tim. In the absence of reasoned and rational business decisions, personalities take over, to the detriment of the project. Ginger immediately assumes power and control. Her first action: Halting all ongoing communications. She then proceeds to revisit the entire system design completed two months before, eroding the confidence of the team, and angering and frustrating the field IT community, who had established migration schedules and allocated resources based on the plans they made with the Centuria-led team.

When Tim and other team members attempt to alert the field IT community as to likely changes and delays, Ginger clamps down on any further communications. She forbids any site visits, claiming they are "too costly and time-consuming." She also puts a stop to the electronic newsletter and the regular postings on the EE project website, claiming that "people don't need or want all of the information. Besides, we're not willing to make changes that they suggest, so let's not pretend they can. We don't have time to fool around."

Tim is frustrated by this. Early in the project, he learned that past projects at TEC failed because of exactly this sort of "ivory tower" attitude. He knew that cutting off communication and ignoring the field IT groups would lead to disaster.

Ginger communicates nothing to anyone outside of the core team, preferring to hammer out treatises that only the core team is allowed to see. She routinely sets, and then cancels, meetings and calls with both team members and the IT community. She refuses to return voicemails or emails, claiming she is far too busy. And when team members try to find her in the project office area, she can rarely be found, insisting that she gets more done "away from everyone else."

Tim knows that without some intervention, Ginger will effectively kill the project altogether. He has been told by both Lenny and Greg that "like it or not, Ginger is in charge." When Tim appeals to them, pointing out the likelihood of further delays, escalating costs, low morale and high turnover, Greg shrugs his shoulders, claiming that his "hands are tied." Greg deflects Tim's request to escalate the issue to his boss, for fear of "rocking the boat." He urges Tim and Lenny to "play nice" with Ginger and "try to rise above this."

Several months go by. The project effectively takes several steps backwards as team members continue to leave at the first opportunity, and the dissatisfaction of the field IT community continues to rise perceptibly, and vocally. (Tim himself would have left, were it not for the strong allegiance he feels to TEC and his own team members.)

Some business units make plans to install their own EE applications, regardless of "orders from CIT." Others register complaints with the parent company's IT steering committee, which includes TEC's CEO. When he finally becomes aware of the extent of the delays, he demands that GenereX replace Ginger as PM. (He also quizzes Greg as to why this is the first he is aware

just how awry the project has gone, since Greg had assured him repeatedly that everything was “just fine.”)

Generex eventually does replace Ginger (in fact, they offer up a veritable parade of PMs over time). But this time, Greg anoints Lenny as the unambiguous PM and puts Tim clearly in charge of global implementation. The various Generex PMs direct a relatively small and benign piece of the project.

Lenny and Tim have much damage to repair, with the project clock ticking loudly. Tim persuades Lenny to go “back to the basics” and conduct a brief telephone survey of TEC’s global IT community to learn just how many reparations are needed to put the project back on track. The good news is that the trust that Tim and his team had worked so hard to establish early on has not been irrevocably lost. But still—there is much work to be done in a very short period of time if they have a prayer of meeting the project schedules.

Fast-forwarding to several months into the future, we see that the EE application is finally rolled out across the globe, almost right on track and within the agreed-upon budget constraints.

What had Tim, Lenny and others done at the outset to build such a strong foundation to begin with? And what interventions did they undertake to put the project back on track, in the face of such adversity?

Investing in a strong foundation

Before the project formally began, Tim began to create a strong foundation early on, focusing on communications amongst team members and from the team to TEC’s many communities. In some cases, he met resistance from some who claimed “they did not have the time for this sort of thing.” But Tim knew from experience that if they did not invest the time now, they would pay dearly later. Tim’s tenacity paid off. Many of the early steps he took to build a strong team paid off when the project began to derail later on.

Before the project formally began, Tim thought about his two primary goals: to create an enthusiastic customer, and to provide financial benefit to his employer, Centuria. He could accomplish both by competing the project on time and within budget.

Among the key activities Tim spearheaded to create a strong foundation for the success of the project:

- **Team selection:** Tim realized that every activity the project would undertake would be done by human beings. He wanted to lead an enthusiastic team, knowing that sustaining high performance over the long haul would only come from having each team member personally committed to the project’s success. (He often thought of the advice of Elbert Hubbard, the founder of the American Arts and Crafts movement, who said “Produce great people, the rest will follow.”) Tim carefully selected individuals with diverse backgrounds and experiences, but with a common capacity for cooperation and predilection for teamwork.

- Team initiation: Tim realized that first and foremost, the members of the team had basic “self and security” needs that had to be met before they could dedicate themselves to the project goals. Since many of the Centuria project team members would essentially be uprooted from their homes four to five days a week for several months, Tim invited them to the customer site a few days before the formal start of the project. This way, they had the opportunity to become more comfortable with the client site, the city in which they would be living, and their fellow team members from TEC—*before* project pressures began to make such a “luxury” impossible.
- Jumpstarting the team: The project schedule did not allow time for this group of individuals to grow into a team at its own speed. Tim worked with a professional facilitator to plan and run a two-day workshop called “Project Jumpstart” to speed up this essential process, and reduce the risk that the needed interpersonal relationships may never gel. This workshop focused on the task at hand, including role clarification, project scope validation, highlighting of important organizational interfaces, identification of and action planning for critical success factors, and reviewing important project controls and documentation. In addition, team members taught themselves how to work as a team, as they developed operating principles for successful collaboration, including areas such as decision-making, review and approval, issue escalation, and problem-solving. In addition, they developed a detailed team communications plan, along with specific vehicles, methods and standards. Team exercises and social time were also included, to strengthen relationships and build trust. *(See end of article for sample two-day agenda)*
- Stakeholders analysis: Tim organized a half-day stakeholders analysis workshop, where Tim, Greg, and client sponsors identified key audiences whose support and assistance was essential. Examples included business unit vice presidents, TEC’s and Lyons’ CIOs, TEC’s executive committee, field IT managers, headquarters IT staffers, and project team members. For each audience, workshop members discussed the probable prevailing perceptions, important messages to convey (and best vehicles to use), author of needed content, frequency, and other details. As a result, a communications matrix was developed, which became the basis for the overall communications plan.
- Communications assessment survey : As the communication plan was being developed, Tim conducted a needs assessment of TEC’s IT community. Greg provided contact information and sent an invitation to all IT managers and site administrators. Tim hired a third-party to conduct the telephone surveys, with responses guaranteed to be confidential.

Among the survey findings: The field IT community generally distrusted the corporate IT group, and most had concerns that they would not be able to influence the plan and implementation of the new application. They also criticized earlier communication efforts from corporate IT. As a result of this survey, Tim and his team placed far greater emphasis on the importance of face-to-face planning sessions to build trust and cement relationships. Tim conducted a similar needs assessment twice more during the project, to validate certain assumptions, gauge progress, and surface any issues or concerns that may not have been addressed. *(See end of article for sample survey questions)*

(Although Tim never doubted the essential need for a communication plan, he never realized how important it would be. As he read the results of the assessment survey, it became clear to him that the technical challenges presented by this project were insignificant compared to the human, political and organizational challenges. He adapted the remainder of the project plan to focus squarely at these issues.)

- A multi-pronged communications plan: Tim organized a series of working meetings to create an overall communications plan, targeted to each audience identified in the stakeholders analysis, as well as to project team members and all of TEC's employees at large. For each audience, the plan included a combination of vehicles to be used, a timeline, key messages, sender of messages, and a feedback loop to ensure two-way communications. Tim hired a communications consultant to implement the early stages of the plan, until an internal person could be assigned. (*See end of article for sample*)

Communication plan elements included:

- Early site visits to involve field IT organizations and business units in up-front planning. Face-to-face meetings at TEC field sites were emphasized, rather than phone or video conferencing, or group meetings at TEC headquarters. Tim organized the meetings to last a day and half. The first day started at noon, with Greg giving a presentation that provided a management review of the project for local IT and business managers. The next day, after the managers had dispersed, Tim's technical team would review the details of project's impact on that site with the site IT technical team. This would start as a formal presentation, but quickly (by design) broke down into several simultaneous and intense discussions. This gave the remote IT groups what they wanted: a voice in planning the changes that would affect their site. It gave Tim what he wanted: reduced risk that the project would stall during implementation because of factors that could have been easily avoided.
- A biweekly electronic newsletter sent via email and posted on the web, to provide concise status updates, invite questions, and openly surface issues. This newsletter also included quotes from site IT managers who had been through a "planning session" (see above). Their comments were genuine and enthusiastic, and sent a signal that this project was not "business as usual" for TEC.
- Periodic conference calls to relay the status with the field IT community, and to encourage callers to pose questions and raise issues freely. The relationships cultivated by early face-to-face planning meetings made these conference particularly calls effective.
- The creation of a project web site, where documentation and updates could be posted, to be promoted via the use of email when new postings were made. Based on a suggestion made by a member of the field IT community, additions to the website were mentioned in the newsletter, so everyone would know when changes were made.
- Personal visits by senior project sponsors to business unit VPs and other important audiences whose support was critical, especially in the early stages

- To help TEC sites complete their planning and other prerequisites before the Centuria implementation team came on site, Centuria prepared a “franchise kit” of materials to be distributed via CD-ROM. Communication and training materials were included and updated regularly, allowing each site to modify for their unique environments, including cultural and language differences. Materials included:
 - Customizable guides intended for all TEC employees, to be populated by local IT groups, to help employees prepare for the migration, and to provide valuable references and tools immediately upon migration
 - Purchase of quick look-up guides from Nevada Learning Series, to give employees a speedy reference to the most frequently-asked questions
 - Creation of presentation templates that team members and the field IT community could use to provide regular updates to all interested employees
 - Development of a “how-to” guide for IT managers to hold “town meetings” to familiarize all employees with the new application, and to encourage them to register for the required training
- Cultural sensitivity: Because this was a global project, Tim made sure that all team members were aware of cultural differences that may affect the success of the project. Among the steps he took: Hiring a cross-cultural consultant to present key cultural differences and their implications; purchasing a quick look-up book that provided a snapshot of important cultural aspects of different countries; and double-checking potential differences in meaning before sending important memos.
- Team “health check”: About six weeks after the project launch with the core team, Tim enlisted the help of the facilitator who ran the original “Project Jumpstart” session. Team members were asked in advance to evaluate how well the team was working and to complete a quick survey to indicate communication preferences and styles. In this “Team Healthcheck” workshop, team members shared results of both surveys, and discussed implications for their ability to continue to work well as a team. An especially valuable outcome: Team members had a better idea how each one preferred to hear and convey information, which helped the team communicate more effectively, especially as the pressure increased throughout the life of the project.
- Speedy escalation path: As part of the team operating principles developed during the first week of the project, potential bottlenecks were removed from the start. Tim was allowed direct access to Greg and to TEC’s CIO if he felt it necessary to keep the project moving forward. And within Centuria, Tim was likewise given permission to escalate issues to the decision-maker most likely to effect the desired outcome as quickly as possible, such as the need for senior management support or additional resources.
- Celebrating milestones and achievements: Tim realized that unless he purposefully planned such celebrations with the team, they could easily be forgotten in favor of working longer days and nights to meet deadlines. Since most of the Centuria team spent

at least a few nights away from home, team members had many opportunities to gather to toast successes, discuss problems, and create new goals and plans. In addition, several more formal celebrations were arranged with the client sponsors to congratulate team members for major milestones.

Moving the project back on track

Once the Generex PM was removed and Lenny and Tim regained leadership of the project, they quickly took action to reinvigorate core team, assimilate new members, and repair damaged relationships with TEC's field IT community. Among their actions:

- **Follow-on field IT survey:** In the absence of any communications over the previous several months, the team wanted to quickly understand current perceptions and beliefs about the project, and to help determine priorities for a new communications plan. Respondents included a subset of the initial field IT survey performed several months earlier. The results confirmed the team's fears regarding the extent of damage created by the outgoing PM, and the amount of work required to rebuild relationships.
- **Communications strategy and planning workshop:** This day-long session included core team members, many of whom had come on board within the last few weeks, as well as senior project sponsors. After hearing from those closest to the customers (both field IT and end-users), the team created a plan of action for reaching out to key audiences as quickly as possible, using the best available means.
- **Project "Fresh-start":** Once the Generex PM was replaced, Lenny and Tim quickly arranged for another Project Jumpstart session. Of the more than 20 participants, fewer than half were part of the original core team, and many had joined the project within the last month. The chief objective: Regain momentum as rapidly as possible by creating a strong foundation for this new team, built on trust and mutual respect for each others' capabilities.
- **Restarting regular conference calls:** The team began once again to hold weekly conference calls with representatives from those regions and sites whose migrations were most imminent. Regional calls, involving representatives from multiple sites, typically took place weekly. To make up for lost time, the team was overseeing four to five migrations per week, which required precise orchestration from dozens of players. Calls with site teams typically occurred daily, as the need for flawless coordination became a requirement to implement all activities within the agreed-upon schedules.
- **Team visits to the field:** Team members coordinated with regional IT managers to make personal visits to nearly all sites about to migrate. These visits, coupled with the frequent con calls, helped to regain much of the ground lost due to the five-month period referred to by several field IT members as "the black hole." These site visits typically included members from TEC, Centuria and Generex.
- **Frequent acknowledgement of successes:** Tim and Lenny rarely let an achievement or milestone go without issuing public kudos, via email at a minimum. This became especially important to the field IT community as a way to galvanize so many people in

far-flung locations and help them feel like increasingly important members of the team. Many memos took the form of a thank-you for unwavering commitment and dedicated focus to helping fulfill their role in the migrations.

- Rallying the troops: Despite the now-strong leadership and renewed momentum, many team members still felt frustrated and in some cases, utterly fatigued, by what had transpired over the last many months. As TEC's project sponsors, Lenny and Greg frequently gathered the team together to thank them for their unflagging efforts and acknowledge their contributions. Tim, meanwhile, provided behind-the-scenes mentorship to team members who found it difficult to collaborate successfully with some of the others, for a variety of reasons. For the most part, however, once the team could envision the proverbial light at the end of the tunnel, members would often pitch in and provide support wherever it was needed. Biweekly team luncheons featured chicken wings, pizza, and lively conversations about recent successes and future challenges.

Epilogue:

With the migration successfully completed, Centuria is now acting in a consulting capacity to TEC, providing advice and coaching to TEC senior IT managers. Generex is still handling most IT operations for TEC, whose corporate IT group insists on keeping a much closer handle on their activities and the appointment of key project personnel. Nearly everyone involved in the project from the outset agrees that were it not for the initial investments made in creating a strong team from day one, the project may have remained stalled to this day.

Assumptions that are *never* safe to make when starting a project (or lessons learned):

- Erroneous assumption #1: That everyone on the team will “just get along” and work together to “make it happen.” Just wait for the first snafu and discover how much time and energy it takes to smooth things over. Set aside the time at the outset to allow team members an opportunity to agree how they will collaborate and communicate, especially when times turn tough. Take the time to create agreed-upon operating principles in critical areas such as decision-making, review, and issue escalation. Waiting until problems arise is far more costly and risky.
- Erroneous assumption #2: That you know what your key audiences need to hear—and that they want to hear it from you. If you imagine that top-down communications will magically engage all of the participants whose enthusiastic participation is mandatory—think again. Stop and listen to what they have to say. Ask them what role they expect to play and how and when they would like to be involved. Find out how they prefer to receive and contribute to communications. Try and ferret out what skepticism or cynicism they may harbor so that you can work to overcome it.
- Erroneous assumption #3: That face-to-face meetings are too costly. Worried about the time and money it takes to make personal visits to those most affected by the outcome of your project? If you think that emails, con calls and videoconferencing alone can help

build the necessary trust among team members and stakeholders, just imagine the cost when (not *if!*) you encounter delays due to your failure to cultivate important relationships. Plan trips so that you can accomplish multiple objectives with each visit, and rotate team members so that all have an opportunity to learn from the field. Augment visits with con calls, emails, web threads, etc. before and afterwards.

- **Erroneous assumption #4:** That it's more efficient for the team to employ the identical approach in all locations. If you believe that it will wreak havoc with your schedule if you start making exceptions for different locations, think how much effort will be involved when you realize that your team has failed to accommodate a major religious holiday in one region or a plant closing in a large manufacturing facility in your project schedule. The time it takes to understand the unique needs of each business unit and local culture will be more than offset by the creation of an achievable schedule that can sustain credibility at the outset.
- **Erroneous assumption #5:** That people don't need to be told when they're doing a great job. Do you believe that most people think no news is good news? Or perhaps you are you just too busy to let people know when their contributions are making a difference. Few investments of your time will have a bigger pay-off. Thank people for their efforts, both as a team and as individuals. Take the time to personalize your thanks; be as specific as possible. When appropriate, let others know how you feel, either by copying them on memos or thanking the individuals in a group setting. And don't imagine that once or twice will be enough. Keep the kudos coming, especially when project pressures build.
- **Erroneous assumption #6:** That everyone is just too swamped to celebrate milestones. It may be true that everyone's time comes at a premium during crunch times, but arranging for special get-togethers, whether during work hours or afterwards, means a lot to harried team members. Arranging for off-site meetings that reflect thoughtful planning, such as unusual recreational activities or meals at memorable locations, can help boost morale and foster team spirit. Think team mugs or T-shirts seem hokey? They may to you, but many successful project team leaders swear by such mementos as a means to make everyone feel special.

Exhibit from sample communications plan

| Stakeholder segment | Communications Objectives | Communication vehicles | Main messages | Timing | Who takes the Lead |
|--------------------------|--|--|--|---|--------------------|
| <i>Global IS Council</i> | <ul style="list-style-type: none"> Establish level of comfort for project implementation plan; address concerns Secure commitment for needed resources and cooperation from site IT mgrs, etc. | <ul style="list-style-type: none"> Present at IS Council mtgs. Conduct regional IS mgt. sessions One-on-one with individual members who may need special communications | <ul style="list-style-type: none"> Our designs and implementation plans are logical, efficient, and reflect political and cultural realities of Company We have made great efforts to ensure as smooth and hassle-free migration as possible We are aware of certain challenges/issues for which we need your help to resolve There are some resources we need to ensure a successful project implementation | <ul style="list-style-type: none"> Present at regularly scheduled Council mtgs Arrange for regional IS mgt. sessions Call or meet individual members presenting special challenges, as often as needed | Greg/Lenny |
| | Inform about project milestones, schedule, issues | Periodic e-mail (e.g. one- or two-page project update with highlights and issues clearly called out) | <ul style="list-style-type: none"> Here's our schedule Here's where we are Here's where we plan to be and when Here's what we need to resolve/obtain to stay on track Coming attractions for next few weeks | Send approx. once every 3-4 wks or so) | Lenny/Tim |

| Stakeholder segment | Communications Objectives | Communication vehicles | Main messages | Timing | Who takes the Lead |
|-------------------------|--|--|--|--|--------------------------------|
| <i>Site IT Managers</i> | <ul style="list-style-type: none"> • Assuage fears • Address concerns • Defuse perceived threats • Ensure that any addl. needed funding is secured | <ul style="list-style-type: none"> • Site meeting between project team members and site IT manager, IT admins • Include customizable presentation and ample time for Q&A • Provide needed handouts as backup material | <ul style="list-style-type: none"> • Here's the commitment we have from sr. mgt. • Here's why this project is important to our business today • Here's how/why why it paves the way for future applications • Here's how it fits with other Company IT projects • Here's how and when we plan to roll this project out • Here's our role • Here's your role, and what skills/tools will be needed • Here's the role IT admins will play, and needed skills/tools • Role of help desk & ops • Here's our advice for preparing your community for a smooth transition • Here are the SW/HW configs (may need upgrade, which may require addl funding) | <p>Make site visits as early as possible prior to implementation, to ferret out issues, address concerns, generate positive buzz, identify gaps that need filling, develop relationships</p> | <p>Lenn & team members</p> |

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Sample field IT survey questions

Site IT Survey for Company's Application Roll-out

Name:

Location:

Office supported:

1. What role did you play in the planning and roll-out of Application? Is this the role you expected to play? *(If different, please describe how)*
2. How would you assess your preparedness in carrying out your responsibilities? *(Please indicate what helped you the most, and what would have been helpful, if you had had it)*
3. During the various phases of the Application roll-out, how would evaluate the communications and information you received from the project team? *(Please be as specific as possible)*
4. What communications processes or activities were most helpful? *(Examples: site visits, con calls, emails, web sites, videoconferences, other face to face meetings, etc.)*
5. What other kinds of assistance or support was especially helpful? *(Examples: tools, materials, training, support, etc. that helped you to carry out your role successfully)*
6. What improvements would you like to see (communications, support, tools, other assistance) to help you better prepare for the next enterprise-wide roll-out?
7. Thinking about your business users, how would you evaluate their preparedness in making the move to Application? Which factors helped, and which may have hindered their productive use of Application as quickly as possible? *(Examples: communications, instructions, scheduling, training, support, tools)*
8. If you could give advice to Company's Corporate IT group as they prepare for the roll-out of the next enterprise-wide application, what would it be?
9. Other comments, wishes or advice?

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Sample agenda for two-day Project Jumpstart workshop:

Day One:

- Business drivers, key stakeholders, political and cultural sensitivities from the project sponsor's perspective
- Candidly exploring make-or-break success factors
- Validating project scope, major milestones and organizational interfaces
- Clarifying roles, responsibilities, reporting relationships and hand-offs
- Creating a communications plan for team members and for other stakeholders

Day Two:

- Discovering communications styles and learning preferences through a team simulation
- Mapping out agreed-upon standards and guidelines for critical project documents
- Creating shared operating principles for key aspects of the project such as escalation process, decision-making and scope management
- Understanding risks and dependencies and how best to mitigate
- Developing a clear plan of action, including next steps, responsible people and dates

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