2018 Procurement Conference

October 31, 2018

Building a Culture of Collaboration
for Stronger Project Management

Sarah Carroll
HR Communities of Practice
UW–Madison Office of Human Resources
(608) 263-6918
sgcarroll@wisc.edu

Reflect: What is your #1 greatest challenge when working on projects?

Check Your Knowledge: Prioritize project management work from #1 to #11:

_____ Do the Work   _____ Agree on Goals

_____ Debrief   _____ Define the Work

_____ Identify Risks   _____ Organize materials

_____ Establish Due Dates   _____ Ensure Communication

_____ Apply What Learn   _____ Agree on Process

_____ Maintain Quality

Four phases of project management

Prepare

1	Agree on Goals	- Define what success looks like - Operationalize desired outcomes - Resolve disagreement (ideally win-win)
2	Agree on Process	- Define *how* to get to success - Prioritize stakeholders' needs - Prioritize constraints
3	Organize materials	- Identify & create needed materials - Create space for shared access - Keep things up to date as go

Plan

4	Define the Work	- List all of the work that needs to be done - Break down and prioritize the work - Define what's out of scope to prevent scope creep
5	Identify Risks	- Look for what can go wrong - Prioritize risks - Deal with risks
6	Establish Due Dates	- Create realistic schedule (realistic estimate) - Establish owners - Note dependencies, resources, and risks

Implement

7	Do the Work	- Set people up to win - Hold team accountable - Give and get feedback
8	Ensure Communication	- Meet regularly - Be proactive with stakeholders - Give predictable status updates
9	Maintain Quality	- Inspect everything - Resolve root causes - Control issues

Improve

10	Debrief	- Reflect! - Review lessons learned - Understand in order to adapt
11	Apply What Your Learn	- Decide what you will repeat - Decide what you'll change - Identify needed training

Symptoms of Poorly Performing Project Teams

PREPARE	
1. Agree on goals	Everyone has a different picture of the end goal. You struggle to articulate the goal due to confusion.
2. Agree on process	Meeting content is redundant. Interpersonal conflicts begin to arise as work styles clash.
3. Organize materials	There is no project charter, nor meeting minutes, etc. No one knows where anything is stored. Deliverables are unarticulated.

PLAN	
4. Define the work	Additional, unexpected work on the project keeps emerging.
5. Identify risks	The unexpected takes you by surprise.
6. Establish due dates	You have no project schedule. You scramble to meet emerging deadlines. No one knows who is accountable for what.

IMPLEMENT	
7. Do the work	You or others have a "not my job" mentality. Work is not done.
8. Ensure communication	No one knows what others on the project are doing. Leadership stakeholders have to ask for updates.
9. Maintain quality	You spend more time fixing issues than making progress.

IMPROVE	
10. Debrief	The project team disbands without reflecting on what worked and what didn't. Unresolved conflicts persist into the next project.
11. Apply what you learn	You make the same mistakes repeatedly.

Strategies for Collaborating with Others More Successfully

PREPARE

While it is important to agree on goals and process, and to write these things down, it also matters *where* you write things down. Check all of the items below to indicate where you currently store project-related notes:

☐ In your head   ☐ MS Outlook calendar

☐ Post-it notes   ☐ MS Outlook tasks

☐ Miscellaneous pieces of paper   ☐ MS OneNote

☐ Notepad / notebook   ☐ MS Project

☐ Your office whiteboard   ☐ Trello

☐ Email   ☐ Other: _____

☐ Google docs   ☐ Other: _____

Questions you might ask as you work with others to agree on goals and process:

What goals and expectations are most important to your stakeholders?

What is the problem that the project is intended to address?

What are the current solutions (or workarounds) to the problem, and why aren't they sufficient?

What's the vision for what the end result should look like and accomplish?

What is the project designed to do and NOT do?

Do your stakeholders have any concerns about the project?

What background research has been done? Are there any conclusions from that research?

What constraints will affect the project scope, schedule, and resources?

What risks are you aware of and how might they affect the course of the project?

Who are the stakeholders who will be affected by the project?

Are there other people who need to be involved?

PLAN

Defining work (taking large goals and breaking the work into actionable chunks) and then establishing *"who will do what* [of those actionable chunks] *by when"* is critical to any project's success.

Good collaboration requires agreement to perform this crucial step.

Anticipating risks is an important part of any project. Consider collaborating with others after doing adequate research to map the risks you're aware of and their relative significance:

	Catastrophic!	Critical	Marginal	Negligible
Certain!				
Likely				
Possible				
Unlikely				

Agree as a group how you can and will manage risks:

PREVENT?

MITIGATE?

HAVE CONTINGENCY PLAN?

IGNORE?

IMPLEMENT

In the phase in which you <u>do</u> the actual work, there is a lot that can go wrong without adequate preparation and planning. If you notice that you and/or others are struggling, ask these questions:

__ Did everyone agree with the goals of the project?

__ If there were unresolved issues, did you schedule a meeting to resolve them?

__ Did everyone on the project have the training/ resources to be able to do the job?

__ Did you create short term wins at the beginning of the project?

__ Did everyone on the team know what everyone else is accountable for?

__ Was ownership clearly defined?

__ Does the group follow up with people who miss deadlines *before* those deadlines pass?

__ Does the group have a mechanism for tracking commitments?

__ Does someone provide direct feedback to persons who do not keep their commitments?

__ Does the group recognize success, high performance and improvement more than criticize?

If you answer no to any of these questions, it is critical to go back to resolve the root issue.

Additionally, communication with stakeholders is not a one-time job. Consider who will maintain ongoing communication with key stakeholders regarding what topics involved in the project.

To ensure quality, ensure that someone is consistently:

__ reviewing all project deliverables

__ confirming deliverables are met

__ prioritizing emergent issues and determining if/when and how they should be resolved

__ identifying and documenting what caused important issues (root cause analysis)

__ holding people accountable for follow-ups

__ estimating and communicating how long it will take to resolve issues

__ planning time in the schedule for working on resolutions—and allocating the work

__ reviewing issues when planning future, similar projects

IMPROVE

PROJECT GROUP: Schedule and conduct a *debrief meeting* in which you review what worked and what didn't during the course and outcome of each project.

SELF: Note the ways defensiveness shows up in your body as your early warning system. Refer to Jim Tamm's TED Talk: *Cultivating Collaboration: Don't Be So Defensive*

Glossary

Project	A temporary (versus ongoing) series of tasks to achieve specific goals. Anything that requires planning should be treated like a project.
Project Management	The discipline of planning, organizing, and controlling resources to achieve specific goals.
Stakeholder	Anyone who has a stake in the project, or is involved in or affected by a course of action. Typically, these are people who have a vested interest in a project's *success*.
Project Life Cycle	All of the steps within a project – from initiation to delivery. The project life cycle can vary greatly depending on the type of project. Often, information about it isn't written down, which can make it difficult to understand how all of the pieces fit together.
Project Charter	A statement of a project's scope, goals and participants. May also include stakeholders, risks, and constraints. Typically, a 1-page document as *part* of the project plan.
Project Plan	Documentation assembled at the start of a project that typically includes: • The stated goal: what *exactly* needs to be done and what problem this solves • Team members and respective roles • An initial schedule: who is doing what, by when (this will also be iterative) • Materials created at the start, including Project Charter, initial meeting notes, etc. • Processes or templates used to help with the planning, including meeting schedules • A list of risks (what can go wrong and what can be done about it) and known issues
Scope	What needs to be accomplished. The scope will *include* some things and *exclude* others. This is critical because when you know the scope, you can avoid spending time on work that won't move your project forward.
Scope Creep	The often unconscious and uncontrolled expansion of a project in ways that does not aid in the achievement of the project's goal. It's usually undesirable since plans don't account for added scope (e.g., money, time).
Dependencies	The things that must be done before other things can be initiated.
Work Breakdown	A list of all of the work that needs to be done, along with stated dependencies.
Milestone	An interim, defined point in a project related to the completion of one or a set of tasks. Typically, you identify milestones while in the planning phase of a project then use them to gauge progress during the project.
Project Review	A meeting that takes place after a project is complete, to assess performance against plan, identify what went well versus poorly, and to plan similar projects more effectively by capitalizing on lessons learned.