

The New Face of the Project Team Member

Quiz Here's the scenario: In the Chevron Corporation, a project team was commissioned to manage the design, funding and construction of a large plant to manufacture a product that was in great demand and offered significant margins. After many months of work, the project team finally completed the project — **ahead of schedule and under budget**. The plant was opened to much fanfare, and the project team celebrated its achievement.

Got it? Here's your one-question quiz: **Was the Chevron project a success?**

(Take your time answering. No one's looking over your shoulder.)

by Catherine J. Rezak

By now, you may have suspected that the question contains some hidden trick.

You're right. The fact is, you haven't been given enough information to evaluate the success or failure of the Chevron project. A correct answer in this case would have been to ask for more information about the larger organizational context or to inquire about what happened next.

Okay, so the above exercise was a little manipulative. But it illustrates a common trend in project management: the tendency to evaluate project success too quickly, too narrowly or with shortsighted criteria. The traditional measurements criteria of schedule, budget and quality, on their own may no longer be sufficient.

Case in point: Let's return to Chevron for the rest of the story. Very soon after its glorious opening, the Chevron manufacturing plant failed and was sold. As it turned out, the market for the high-demand, high-market product was a volatile one, prone to change quickly.

And change it did. Had the project team considered the possibility of this market change, they surely would have explored the option of shelving the project altogether.

Now which criteria would you use to determine success? If you were to consider only the traditional criteria of budget and schedule, you would have concluded that the project was a smashing success. But if the criterion is value added to the business, the project failed abysmally. And it's here that we can observe the need for project team members to begin thinking about their work in different ways.

But isn't such market forecasting the responsibility of leadership? Isn't it unrealistic to expect that kind of strategic thinking from our already-stressed, neophyte project team members? Perhaps that was once true. But the world has changed.

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A New Way to Think about Projects

In the new world of work, the familiar project has become a very different entity.

Carl Pritchard, PMP and principal of Pritchard Management Associates, has lectured and written extensively on the subject of project management. He sees many new trends in project management, not the least of which is the changing profile of the people who are being called upon to lead projects. “What I see in the classroom is interesting,” he says. “It’s an amalgam of old-timer project managers who have been doing it for years without any formal processes and they are in there with a lot of new folks who are just entering the practice. In many instances, these new people are joining project management on the heels of success they had in some other part of the organization. They were pulled off some organizational effort, and management is now looking for a new home for them. **Poof!** They’re expected to be project managers.”

What’s behind this new trend of putting more and more people on a rapidly growing number of projects? Pritchard suggests that one major cause is the near-obsessive customer focus that has become the focal point of organizing for so many businesses. This intense customer focus requires a special touch in fostering new processes and relationships. And that touch must come from individuals who can marshal and control resources and who can recognize when a project is faring well and when it needs more intense time and attention.

One would be hard-pressed to complain about a customer-service orientation. But the new sense of urgency is thrusting onto project teams a lot of people who are not fully equipped. Many still are learning “the hard way” — let ‘em learn it on the fly and hope they don’t foul it up. At the very least, many are being trained in the basic principles and tools in the Project Managers Body of Knowledge (PMBOK).

But how many are being trained to ask the kinds of questions that could have prevented the painful Chevron fiasco?

If you’re thinking PMBOK is enough grounding, think again. Those are implementation techniques — a great place to start, but hardly a full tool box. More is needed.

“We should be training our project teams to be more,” Pritchard agrees. “They need to be entrepreneurs. Consultants. Even agents of change. We need to build the confidence of these individuals to serve the organization with a willingness to effect change without apology and to implement change with an understanding of all those it will affect.” The profile of successful project teams is changing. Success will now require the people on those teams to take on new skills and responsibilities. These include:

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- Strategic, big-picture thinking
- Continual reassessment of the risk and opportunities throughout the project
- Sensitivity to all critical stakeholders and sponsors
- An environment of openness and trust

Strategic, Big-Picture Thinking

As the Chevron project team members painfully learned, projects don’t exist in a vacuum. In the end, the project teams that deliver value to the organization will be the ones who are keenly attuned to the organizational strategies and objectives.

Lynne Hambleton, manager of learning systems at Xerox, agrees. “I’m aware that many organizations measure project success using the traditional criteria — such as time, cost, scope,” she says. “But that just doesn’t fly in our culture, where quality is important, and our Malcolm Baldrige award continues to set a legacy for excellence. Those traditional criteria just don’t get us there. That’s why, at Xerox, our projects must always speak to value provided, whether that’s value to Xerox or to the client. We make it clear that project teams must offer **solutions** that support **strategy**. That’s a lot more complex than the old way of thinking.”

Continual Reassessment of Risk and Opportunities

The project team may be doing things the right way — but are they still doing the right thing? That’s the kind of question that characterizes today’s new breed of project managers.

At Xerox, project team members are trained to continually assess both risks and opportunities from the inception to the completion of the project.

“Just about everyone involved in the project is asking questions like, ‘What’s going on in the larger context? What could derail our efforts?’,” says Hambleton. “Project team members certainly ask those questions. And the operations side of the team is definitely asking those questions a lot because they’ll be the ones running the effort after the project is done. They are constantly held accountable because they’re going to be living with it.”

A Sensitivity to Critical Stakeholders and Sponsors

Nothing scintillating here; it’s in all the basic texts. Yet the critical process of managing stakeholders continues to be ignored. It’s the oldest story in the book: The project was delivered skillfully, but a key stakeholder was left out of the process ... and the project choked. It’s sobering to realize that these stakeholder interests are almost never hidden. In fact, they are often quite overt. But if the project team members don’t ask, stakeholders interests won’t be spelled out in the statement of work or the contract. The make-it-or-break-it criteria never even show up on the project team’s radar screen.

Pritchard offers this example: “I met with my contractor just this morning to talk about the addition we’re putting on our home. He hammered me with all the right questions. “Who will I talk to?” “Who might I talk to?” “Who will sign the changes?” “Who will be around

the day they place the Porta-John?” They were great questions! The barrage was almost too much for me. I started thinking about the many project managers who would rather put off those difficult discussions until later, after the relationship develops. But my contractor is building our relationship now. He’s not wasting time. As a result, he’s going to have a very clear understanding of my expectations — just as I will have a clear understanding of his.”

Trust and Openness

Perhaps it’s the many technical tools of project management — the risk assessment grids, the Gantt charts, the budget sheets — that lull well-intentioned project teams into the mistaken belief that their role is itself technical. But success isn’t built exclusively on deadlines, budget and quality. Remember, there are people involved here. And the wheels of relationships are greased by those old nonquantifiables of trust and openness. Pritchard agrees. “Project management has long been a somewhat furtive practice where we (the practitioners) take it upon ourselves to ‘hide’ extra money and time without letting the customer know we’re doing it and why,” he says. “Honest project management is going to be the successful project management over the long term. Some organizations cannot support overt communication about risk, time and cost slippage, and

The Learning Connection

So how does one communicate new principles about project management in a way that leads to a culture shift? Based on her own experience with a discovery learning simulation, Xerox’s Lynne Hambleton offers some suggestions:

- **Make it active.** There’s still a place for flip charts and PowerPoint presentations in classrooms of corporate America. But adult learning theory confirms time and again that people learn by doing. At some point, put away the flip chart and get people on their feet.
- **Make it fun.** “Let’s face it. Project management is a pretty dry subject,” confides Hambleton. “I have the most success engaging learners when they’re having fun. That was one big reason the Countdown® simulation worked so great at Xerox. It was fun.”
- **Make it practical.** After engaging people in the fictional world of the learning simulation, Hambleton’s work is only half done. The next critical piece is connecting the experience back to the reality of daily work. How can we actually practice what we’ve learned? How do we actually do this in our work? If you don’t tie it back, people won’t ever own it.

team relationships. Those organizations should be out of the project management business in the not-too-distant future.”

Ripples of Change

The skill-building approach to project management is giving way to a new paradigm: the culture-creation approach, in which project management is a holistic process, nurtured by the organization's shared beliefs, attitudes and infrastructure.

But cultures can be slippery things. How does one create a culture where project team members enthusiastically embrace the new attitudes, beliefs and skills that lead to success? At Xerox, it's a matter of education. And not just the dry flip-chart-and-lecture kind of education; Hambleton immerses people in the subject in the most compelling way of all: experientially.

Using a discovery learning simulation, Xerox's Hambleton equips project team members in a low-risk, high-involvement learning environment. The participants become instant project managers and are quickly connected to the models of Gantt charts, resource allocation grids and critical-path diagrams.

As more and more companies are beginning to embrace this strategic partner approach to project management, success stories are already emerging and offering a tantalizing glimpse of the possibilities.

At AT&T, project team members from many divisions are brought in at the earliest conceptual planning stages of an effort. Schneider National formalized its tracking and status reporting and introduced common project management language across lines of business. And at NCR, team members begin assessing opportunity and risk on day one ... and continue until completion.

To be sure, at each of these organizations the traditional tools of PMBOK are still firmly in place. So what distinguishes them from others? Look a little deeper and you'll find some new assumptions at work: project work teams are most enabled when members see themselves as leaders, strategic partners and entrepreneurs. And leaders, partners and entrepreneurs are developed only when organizations embrace employees as whole people. As is often the case with success stories, the victory arises not from the tools but from human beings. Now there's an assumption worth embracing. ■

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