When you are the new Project Manager, and kick-off is tomorrow…

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Project managers are expected to follow the PMBOK guidelines, but organizational cultures and senior management decisions sometimes make it challenging to follow all recommended processes and steps…

How do we adapt to real-world situations while keeping true to the PMBOK principles?

A "true story" example…

Scenario 1: "You want it when?"

You are assigned as the project manager for a project where the delivery date is pre-defined, aggressive, and cannot be changed; no delivery structure, organization, nor interim milestones are set…

What do you do first?

A.   Start by defining the team and negotiating resources

B.   Quit… they obviously don't understand what project management is

C.   Work with the business owner to define scope and determine what can be delivered in the given timeframe

D. Define workstreams and create a schedule that includes realistic milestones

E.   None of the above

		Pros	Cons
A	Define team & negotiate resources…	✓ Your team is your most important asset ✓ You can't get much work done by yourself	✗ If you don't have scope, you can't organize & direct the team ✗ You may not be able to form the right team if you haven't defined scope or
B	Quit…	✓ Only if you already have the next job lined up! ✓ May result in momentary satisfaction, with an immediate whack of reality	✗ Car payment is due on Friday ✗ Your reputation is your brand
C	Define scope to agree what can be delivered in timeframe…	✓ Defining and prioritizing scope helps set the stage for success ✓ Drafting a timeline can help focus scope to only the priority items /	✗ Implies you can "de-scope" some work ✗ Must consider available resources too
D	Define workstreams and create schedule	✓ Organizing workstreams and schedule may help focus scope discussions ✓ Having a schedule helps muster	✗ Can't necessarily define workstreams and schedule if scope isn't defined
E	None of the above	✓ Please share your solution! (Your epiphany is valuable)	✗ Throwing your hands up (avoidance is not the answer…)

Scenario 2: "Slow down…I just got here!"

The original PM wins the lottery and never returns to work… you are assigned as the successor. The project is in execution, but the Charter is not approved and requirements are incomplete…

There are ongoing scope questions that could have a material impact on schedule and cost…but some scope elements are defined, which is why execution commenced.

Should you continue execution?

A. No – All work should cease until scope and requirements are fully signed off

B. Yes – let execution for agreed-upon scope continue, while discussions proceed on pending scope decisions

	Pros	Cons
A Cease work until you have scope & requirements…	✓ Defining and prioritizing scope sets the stage for success ✓ Ensures the most effective design	χ Adds more time and more cost χ Risks loss of current team if they are diverted to other projects χ Risks descent amongst the project team when "the new guy" forces a pause
B Continue execution on agreed scope…	✓ Makes efficient use of time and resources ✓ Keeps the project team in place ✓ May reduce time and cost to deliver	χ Risks re-work χ Could add time & cost to the tail end χ Opens risk to gaps and missed requirements χ Difficult to define workstreams and schedule if scope is not defined

Scenario 3: "Shiny New Toy!"

Your Business Owner/Sponsor attends a technology conference and comes back with a project idea to implement a shiny, new system that will solve all of our problems! They've confirmed there is no need to do a solution analysis or vendor assessment…this is it!

How do you respond?

A. Insist on full problem definition and solution-agnostic requirements gathering

B. You are the PM…not a decision maker; engage Procurement and let them handle it…

C. Nod your head and say you got it! They pay your salary after all…

D. Agree, but guide them to a deeper analysis by following a defined process

		Pros	Cons
A	Insist on problem definition…	✓ How can you know what to buy before you define requirements? ✓ Forces your sponsor to evaluate his/her needs	✖ Insisting rarely works… ✖ Your sponsor will be very reluctant to elicit requirements ✖ "Requirements" might end up being a regurgitated list of product features
B	Let Procurement handle it…	✓ Procurement may force an RFP / RFI process, which could elicit requirements from your sponsor ✓ Could be easier for you short term	✖ You won't be a very good partner if you throw it over the wall ✖ Procurement will likely come back to you to conduct requirements analysis
C	Nod your head and say "you got it"…	✓ If the checkbook is open, take the check! ✓ You may get lucky and the system might just be the right solution! (and	✖ If it does turn out to be the wrong solution, it will backfire on you and your sponsor
D	Agree, but guide them through deeper analysis…	✓ An analysis of the solution should go hand in hand with an analysis of the problem ✓ Stepping your sponsor & team through a fit-gap, RFP, or requirements analysis process could validate whether (or not!) this is the best solution	✖ It will be hard to steer away from a solution-driven approach to defining the project (vs. a business need / requirements-driven approach)

Scenario 4: "Over worked and under water!"

As the PM, you are assigned to 3 large, visible projects (with different stakeholder groups). Juggling all 3 seemed achievable because they followed different schedules and could be managed through natural ebbs and flows. Plus your team is short-staffed…you want to be a team player.

After a few schedule delays…they all start burning at once!

What do you do?

A. Throw your hands up… insist that your manager remove at least 1 project

B. Consider changing the project schedule for one or more projects to increase your capacity now

C. Change your work style to delegate the transactional tasks and focus on stakeholder and risk management

		Pros	Cons
A	Take away at least 1 project…	✓ Improves focus and quality of delivery ✓ Delivers benefits on expected timeline	χ Team does not have capacity; may need a temp χ Transition requires more time in the short-term
B	Adjust all project schedules…	✓ Ensures continuity of the PM ✓ Gives you more time to sleep and eat	χ Delays business benefits χ Project teams may not be able to support delayed timing
C	Change your work style away from transactional…	✓ Delivers greater value ✓ Improves focus on accountability (relationships, stakeholders, risks…) ✓ Reduces focus on transactional items (status & schedule updates, actual vs. budget reporting…)	χ Cannot remove focus on transactional items completely…need to strike a balance

Scenario 5: "Why didn't you ask that in the meeting?"

Team Meetings are well-attended but lack participation and active engagement. Following the meetings you notice a trend of people following up individually via email or stopping by your desk to address topics discussed during the team meeting…how do you address this and change the dynamic?

A. Keep meeting as-is, but change your approach to call on people specifically during the meeting for real-time feedback and opinions

B. Consider a different meeting structure; smaller groups or 1:1s to gather feedback in advance of the larger group meeting

C. Pre-assign agenda items to individuals and have them report at the meeting

D. Start bringing manapua to meetings (realize you have some team-building to do, and figure out how best to accomplish that)

E. Ask different team members to plan and lead upcoming meetings

F.   Any or all of the above

		Pros	Cons
A	Call on people directly…	✓ Helps engage people to speak & participate ✓ Individuals emboldened to offer input and	✗ May be ignoring cultural dynamics that are barriers to participation ✗ Risk discomfort by "forcing"
B	Change meeting(s) structure	✓ May provide a more comfortable, "talk story" approach for individuals to offer input and suggestions	✗ Takes more of your time for coordination ✗ Some may feel "left out" if not included
C	Pre-assign agenda items…	✓ Provides a structured mechanism for individuals to provide input ✓ Assumes that team members will do their preparation prior to the meeting	✗ Individuals may still be uncomfortable, especially if its perceived as too "formal" ✗ Requires more individual follow-up and
D	Bring manapua to meetings & team building…	✓ Living in Hawaii, it is important to acknowledge & understand the concept of "Pilina" or team-building	✗ May not have a lot of "time" to do team-building
E	Have team members lead meetings…	✓ Takes some of the pressure off you ✓ Gives team members opportunity to drive discussion	✗ Some team members may not feel comfortable taking the lead ✗ Can you really relinquish control???
F	Any / All of the Above…	✓ This one is tough! Trust your instincts…	✗ It's going to take time & patience…

Scenario 6: "Since the hood is open…"

Sales is sponsoring a project to update your customer relationship management system…the charter is approved, and planning is near complete…

When Marketing hears about the effort, they want to tack on a few scope items because "the hood is open" … how do you proceed?

A. Stop everything…this is text book scope creep…not on my watch!

B. It would be efficient to deliver Marketing's scope as a part of this effort, so we should include additional scope…call IT and get it going!

C. Consider as a phase 2 and start scoping/funding discussions for that

D. Engage the sponsor, discuss if the new scope aligns with objectives; maybe this was missed scope that justifies a change request…

		Pros	Cons
A	No Scope Creep on my watch…	✓ Maintains focus ✓ Controls cost ✓ Keeps the project on schedule	χ May miss a valuable contribution for the organization
B	Call IT and get it going…	✓ No wasted time; efficiency at its best… ✓ Optimal use of development and testing resources	χ Bypasses control mechanisms χ May add more time and more cost (even if incremental) χ Opens risks to gaps if full team is not aware and onboard
C	Sounds like Phase 2…	✓ Still delivers value to the business ✓ Maintains integrity of controls	χ Not the most efficient approach
D	Work with the sponsor to consider a CR	✓ Guarantees alignment with business objectives ✓ Maintains integrity of controls ✓ Optimizes efficiency (if aligned)	χ May add additional time and cost to the project

Scenario 7: "But we're so close… (aka CR #7)"

You're in phase 1 of a multi-phase project. The delivery partner was scheduled to complete development on Oct 15th but missed this latest milestone due to an abnormally high bug count.

This is the 6th time that this milestone has been missed; we are on change request #7…

A. Scrap the project and all development to date…start over with a new delivery partner

B. Pause development to do a deeper root cause analysis of the issues

C. Provide resources until phase 1 go-live (we are so close!), but pause before future phases begin

D. Quit…its someone else's problem now!

E. Simplify delivery for phase 1 (reduce scope & complexity) to achieve some measure of success

F. None of the above

		Pros	Cons
A	Start Over…	✓ Making a clean break may be the best solution – painful short-term, but may stop the bleeding long-term	✗ Typically not realistic, unless specific, contractual criteria for non-delivery is met ✗ Delivery partner may not be
B	Pause development and analyze root…	✓ May uncover the root(s) of the problem ✓ Affords an opportunity to remedy	✗ Could be perceived as an unnecessary delay
C	Provide resources for phase 1 go-live, then pause…	✓ Addition of short-term resources may help you over the release hurdle ✓ A pause before future phases may help uncover and address underlying	✗ Easy to fall into the "we're so close" trap (ongoing delays perceived as incremental, but that "add up" over time)
D	Quit!	✓ Great idea (if you have another job lined up!)	✗ Not realistic, unless you're a millionaire ✗ Shortsighted; this could happen again
E	Simplify scope / delivery…	✓ A "quick win" may improve morale and provide a foundation for future success	✗ May not be feasible or may reduce benefits ✗ May not be able to de-couple scope
F	None of the Above…	✓ hhhmmmmm	✗ It's probably going to take some time & patience to figure this one out!

Closing Thoughts…

"Do the right thing. It will gratify some people and astonish the rest."

- Mark Twain

"It always seems impossible until it's done."

- Nelson Mandela

MAHALO!