

It Takes a Team to Realign a Project: Lessons From Rescue Missions
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Introduction

We all dream of projects where objectives are clearly defined and mutually understood, where every team member knows which role to play and which responsibilities to fill, when performance is daily routine and constructive feedback is second nature, lessons learned are shared across teams, and, last but not least, the teams deliver results, on time and in budget.

Way too often this stays a dream. The opposite may be the case: The scope is undefined, stakeholders expectations are not aligned, roles and responsibilities are only vaguely defined but not agreed upon, and antagonism, distrust are widespread, isolated and insular work practices dominate actual team work, and deliverables are late and/or of poor quality.

The big question is how to get out of this mess and realign the project. Regardless where and how you start this mission, it should be clear that a project manager (PM) alone cannot accomplish it. It takes a team to do so.

This paper will explain how you, as a PM, can involve your team to realign a project gone astray. It starts with a look at the common themes of prominent approaches to project recovery. I compare these approaches with my own experiences and the results of a survey about project realignment (Juli, 2009, July). The survey results clarify there is no single best approach to project recovery. However, it suggests that involving your own team in realignment efforts is more promising than, say, a top down approach where executive management dictates what to do. On this token I am proposing a simple yet powerful and effective three-step approach to project recovery that actively involves your project team. I will present practical tools, methods, and exercises for each of the steps that can help the recovery team to quickly gain ground. The article concludes with a discussion of what we can learn from project realignments. I will point out how and where to apply lessons learned from project recoveries in aligning projects right from project initiation to closure.

Approaches to Project Recovery

Being faced with your own project gone astray is probably one of the most difficult challenges you can come up against as a PM. Alone you cannot handle such a situation. But where do you start? Who should drive the effort and who else should be involved?

I analyzed a number of prominent approaches to project recovery (see the list of references for details). What most of the approaches have in common are the following steps to project realignment:

- Admit there's a problem,
- Analyze the problem,
- Develop a recovery plan and execute it, and
- Ensure sustainable and long lasting results.

The approaches differ in their responses to the question who is driving the re-alignment effort. In most cases it is either the PM alone driving the effort, a top-down approach, or an external person or team conducting the recovery. In my own survey on project realignment (Juli, 2009, July), I asked what the most effective approaches to realigning a project were and the results speak for themselves (see Exhibit 1).

What are the most effective approaches to re-align a project?

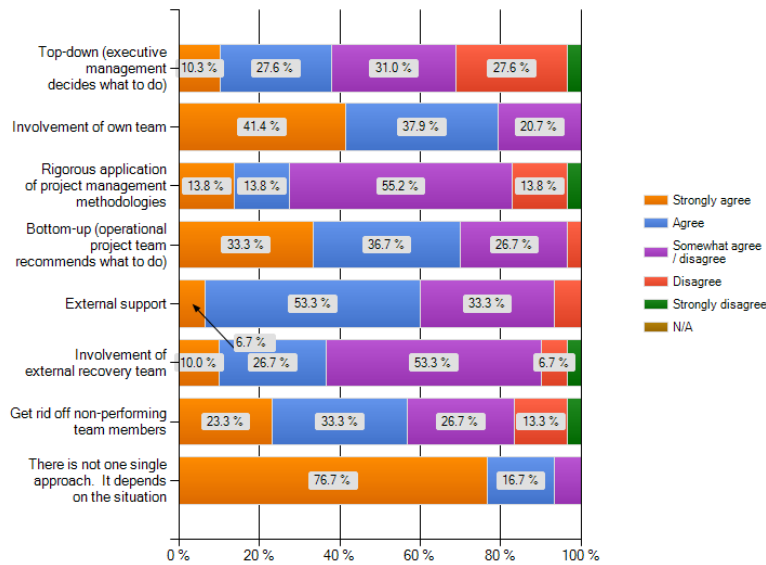


Exhibit 1. Most effective approaches to realigning a project

Ninety-three percent explained that there is no such thing as the ultimate approach. It more or less depends on the current situation, your team members, executive management, and your customers. In second and third place, were responses that actively call for team involvement. Seventy-eight percent believe that you have to involve your own team, while 69% call for a bottom-up approach, in which first the project team assesses the situation and then communicates the results to higher management levels. Interestingly, less than a third of the respondents think that rigorous application of project management methodologies is the most effective approach to realign a project.

What we can conclude from the survey results is that it definitely makes sense to involve your team in project realignment.

In the next question of the survey, I asked how the respondents involved their own team in realigning a project. Eighty-five percent chose the answer “problem assessment”. This is in sync with the other approaches, except that in this case the whole team is involved rather than only one person.

If you involved your team in realigning a project one way or another, what approach did you take?

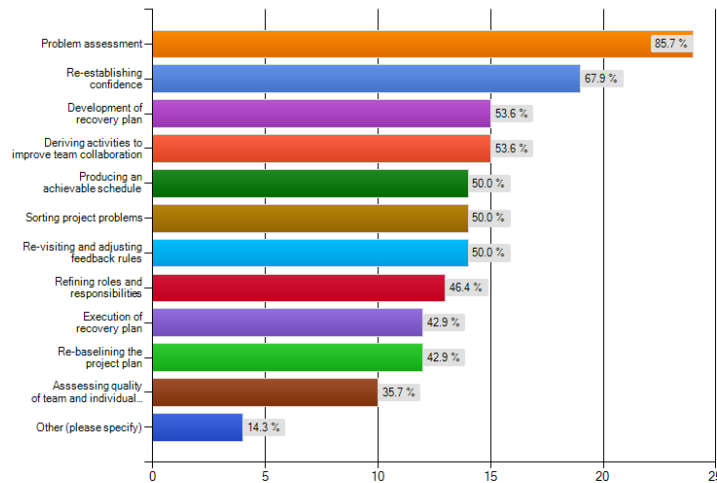


Exhibit 2. Approaches taken when realigning a project

This is not necessarily contrary to other prominent recovery approaches that stress the importance of regaining control. One of the most important foundations of control you have as a PM is your own team. You are surely not the only person on the project who is performing, save for a single-person project. The team as a whole realizes the project. As the PM you lead and manage the project. At the same time, you are a member of the team. Corollary, if you don't have a functioning team, you are acting without a solid foundation of control. Team building helps establish this foundation of control.

In the case of a project in trouble, you can certainly try to realign it and gain control by yourself. Still, it will certainly be easier to involve your team right from the beginning and not at the end. Good leadership, team building, team work, project control, and hence project realignment go hand in hand. The *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)* 4th Edition (PMI, 2008, p. 418) states “Team building is the process of helping a group of individuals, bound by a common sense of purpose, to work independently with each other, the leader, external stakeholders, and the organization. The result of good leadership and good team building is teamwork. [...]” It continues, “Outcomes of team building include mutual trust, high quality of information exchange, better decision making, and effective project control.” There is no doubt that in a project in trouble you do need to regain control over the project. But you cannot do it by yourself or solely from the top down. If you want to succeed you need to involve your own team in the process. This is why *it takes a team to realign a project*.

A practical approach to involve your team in realigning your project

There are numerous ways to involve your team in realigning your project. It certainly cannot be done overnight. A simple yet very effective start is what I call a project realignment workshop with your own team. Plan in at least two hours for this workshop, however three to four hours are recommended and longer durations depending on the complexity of the project. It is best if you can find a neutral facilitator who leads through the workshop. This allows you as the PM to actively participate in the workshop. After all, you are a member of the team.

Whether you limit the circle of participants to the core project team or extended team, including some stakeholders, depends on the situation. Experience shows that the number of participants should not exceed 20 people altogether. If your team is bigger, you may want to consider exercises for groups of five to eight people and have the groups present their results to the whole group. For illustration purposes I assume a project team size of 10 to 12 individuals.

The project realignment workshop is split into three parts: First, you revisit the past; second, you assess the present; and third, you build the foundation of the future. The purpose of the first part is to gain a common understanding of where you and your team have come from. The results of this first part are a list of categorized and prioritized lessons learned. The purpose of the second part is the need to admit that there is a problem, and we as a team are capable of resolving it. The outcomes of this part are a “problem statement” and a recovery-objectives statement. Finally, in the third part of the workshop, we build a common ground and direction on how to move forward to succeed. The results of the third part are refined roles and responsibilities and a list of activities that secure mutual understanding of the project and recovery-objectives statements. This will also boost team collaboration, performance, learning, and project results. Let's have a closer look at each of these parts.

Workshop Step 1: Revisiting the past

In this part of the workshop you and your team review what has happened in the past. Team members will get five to 10 cards on which they will write their answers to the questions:

- What went well thus far?
- What did not go well?
- What can we do better and how?

Each person can write one answer per card. This means, if each person has 5 cards it can give 5 answers, regardless if it is a response to the first, second, or third question. In order to sort the answers, ask each team member to initialize his or her response card in the top right corner with the initial of the following categories (V, C, P, L, or R):

V: Vision / project objective(s).

Sample guiding question: Does everyone have the same understanding of the project objectives and live by them?

C: Collaboration (in team, with management or sponsor, with customer, etc.).

Sample guiding questions: How do you rate our teamwork, communication with stakeholders, and customers, etc.?

P: Performance of individuals and/or team.

Sample guiding question: How do you evaluate our team performance?


L: Learning or feedback culture within team and project environment.

Sample guiding question: How much do we value open and constructive feedback in our team?

R: Results / solution quality.

Sample guiding question: How do you rate our quality of work?

Once everyone has written down his or her feedback, the workshop facilitator collects the cards and presents them to the whole group. The He or she reads the respective response card out loud and pins it onto a white board or wall. This whiteboard may look like the following table:

	Vision	Collabo- ration	Per- formance	Learning	Results





Exhibit 3. Whiteboard example

Alternatively, you can ask each individual to present his or her feedback. Beware though that this could be much more time consuming. Not everyone likes to stand in front of an audience and present his or her results. This is why making use of a facilitator is the logical choice.

Once all cards have been posted, the team prioritizes the input. For this purpose each individual has a limited number of votes to cast, say 10 votes. He or she can accumulate all votes onto a single card or distribute them. The individual either marks the cards with a stroke for each vote or puts little stickers onto the cards for each vote casted. Allow five to 10 minutes for this exercise.

Once everyone has casted his or her vote the team discusses the the response cards with the most votes for each question. The facilitator needs to make sure that the whole team has the same understanding of the responses and their meanings. Things that went well thus far you definitely want to continue. Things that did not go well need special attention. They will form the basis for the next exercise in part two of the realignment workshop.

Workshop Step 2: Assessing the present

In the second part of the workshop the team drills down the top issues and risks of the project and comes up with a recovery-objectives statement. For the first exercise you may want to split your team into groups of two or three people. For this purpose each groups answers the following question:

- What are the top issues or risks identified in part one of the workshop?
- Who is affected by these issues or risks?

- What are the impacts of the issues or risks?
- What needs to be done to resolve the situation?
- What benefits can we expect from the improved situation?
- What critical success factors need to be met to achieve this?

Responses are written onto a flip chart. Each group then presents its answers to the whole team. Once every team has presented its answers, the complete team discusses the various problem statements. The facilitator has to make sure that the discussion is results-oriented and move toward a common wording of the problem statement. Discussion time shall be limited to 10 to 30 minutes depending on the project situation.

Once we have achieved this, we go back to the small teams we formed for the prior exercise and develop a recovery-objectives statement. This is based on the commonly agreed upon problem statement in the previous exercise. Ask each group to build a SMART recovery-objectives statement. SMART means that the recovery objectives need to be Specific, Measurable, Achievable, Relevant, and Time-boxed. Similar to the first exercise, the small teams present their suggestions to the whole team. The complete team then discusses the various responses and agrees on a common wording for the recovery-objectives statement.

Note that it is absolutely critical that everyone in the team understands and buys into the project recovery statement, its scope, and implications. The objective statement sets the direction of the project and team work. You as the PM are the skipper, who ensures that your boat is and stays on the right course to its ultimate destination. This destination is described in the project objectives statement. This is why *you have to make sure that the recovery-objectives statement is in sync with the overall project objectives statement.*

Workshop Step 3: Building the future

Having a project recovery statement is extremely helpful. It provides a direction to the team with clear deliverables and a timeline. It is a start. For the recovery statement to become alive you have to put it into perspective of your imminent environment, i.e., your own team. For this purpose, you revisit the roles and responsibilities of each team member and identify areas where each individual can contribute to achieving the recovery objectives. Unless you already have a description of each role on your team, identify each role, its responsibilities and deliverables and then capture it on a flip chart. Use one flip chart per role.

The description should address two aspects: first, the role in the project in general, and second, the role in the recovery mission in particular. Once you have spread the flip charts in the meeting room, ask team members to add their expectations in this role and write it onto the respective flip chart. In reverse, ask each team member what the respective role can expect from the team to fulfill it. Allow 15 to 25 minutes for this exercise. The facilitator presents the final flip charts to the whole team. It is important that every team member knows the responsibilities, deliverables, and expectation of each role. Plus, every team member has to buy into this role description. If there are any discrepancies or different expectations, this is the time to discuss these issues and resolve them.

Once we have revisited and refined the individual project roles and responsibilities for the project realignment, list the activities that boost team collaboration, team performance, team learning and project results. This will ensure the whole team lives up to these activities and consequently the project and recovery-objectives. For this second exercise the facilitator hands out a limited number of cards and asks each team member to write down his or her suggestions. Have team members initialize their cards with the categories of their response. The categories are V for vision and project objectives and the resulting scope, C for collaboration, P for performance, L for learning and R for project results. The facilitator collects and presents the cards to the audience. Similar to the first exercise of part one of the workshop, it is useful to have a prepared flip chart showing the various categories. Following the presentation of the results, the team prioritizes the input. Use the same voting rules as in the first exercise of part one of the workshop. The three cards that get the most votes will be discussed in the project team. They become the leading mottos of the daily work of the team in the coming weeks of the project recovery mission.

Lessons learned from project realignment

The workshop setup is simple. At the same time, it yields powerful results: The team develops a recovery-objectives statement, revisits and refined project roles and responsibilities to support project realignment, and collects a list of

activities to secure living up to the project and recovery-objectives statement. It also boosts team collaboration, team learning, team performance, as well as gaining tangible project results. At the same time the workshop is a strong team building exercise. The team jointly reviews the past, assesses the present situation, identifies and categorizes problems, and develops resolutions to the most pressing issues and risks. This is a joint team effort. It secures team commitment and accountability. This is a very powerful foundation for project realignment.

Still, do not jump to the conclusion that the realignment workshop automatically guarantees successful rescue missions. It does not. It is a stepping stone, though an important one. After a realignment workshop, it is up to the team to execute its team created recovery plan and live up to its guiding principles. The workshop is a start; team performance comes next.

You as the PM have a special and important responsibility at this stage. The workshop empowers the team as a whole as well as each individual team member. Following a realignment workshop you have to enact team performance. Team involvement and team building are ongoing activities. A project gone astray usually cannot be realigned over night. It takes time. There is no doubt that involving your team is one of the smartest things to do to master such a complex task. It is not sufficient though. Take for example, project situations where the existing project team is part or even the source of the problem. In this case, it may not make a lot of sense to continue work with the present team. Instead, you may want to consider replacing the team or individual nonperforming team members or choose a top-down approach, where executive management dictates what to do and how to recover a project in trouble. Ultimately, however, you have to involve your existing or newly formed project team.

The best way to align your project for success is when you set it up right from the beginning. In the *Team Involvement and Project Re-Alignment* survey (Juli, 2009, July) I asked what lessons learned from project rescue missions can be applied to setting up and managing a project. The vast majority (88.9%) of the survey respondents answered that it is to plan and conduct a vision/project objective definition workshop with your own team. Having the same understanding of the project objectives and the general direction of your project and its environment, (i.e., its vision) is a critical factor to project success. Second, having a list of short-term, (e.g., weekly) deliverables and measurable results ensures that the project stays on track. Third, setting up quality standards for project phase such as entry and exit criteria, is another critical success factor.

It is up to you as the PM to show leadership and follow this advice. Don't try to accomplish the challenge of aligning or realigning your project by yourself. Build, involve, and empower a team right from the beginning. It is an investment that serves as your insurance for project success. And it can yield great payoffs. It takes a team to align and realign a project. But it also takes effective leadership to empower the team to do so. It is up to you to be or become this leader.

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