

Yes We Can: Team-Building as a Means to Re-Align a Project

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Yes We Can

A slogan moves the world



Yes We Can - More than a slogan.

It has become a motivational, inspirational motto for millions of people in the US and world wide.

One leader is asking the crowd to follow and support him to master the economic, political, social challenges ahead. He **calls for joined action to make the impossible possible.**



Yes We Can

An attitude to project recovery

Project recovery or re-alignment missions are probably one of the most difficult challenges a project manager may face.



Examples of projects in trouble:

- o project objectives are not mutually understood or supported
- o unclear roles and responsibilities in team
- o lack of team self-reflection
- o low delivery quality

Alone, a project manager cannot handle such a situation.

Yes We Can - suggests that a project leader asks his team to follow him to re-align a project with project objectives and stakeholders' expectations.

➔ The question is, **how** can the leader engage his team to recover a project? In particular, *how* can team-building contribute to achieving this goal?



Objectives of Workshop



When the workshop is completed, you will be able to

- **involve a team to re-align a project**
- **explain why and how team-building can help re-align a project**
- **transfer lessons learned from project recoveries to aligning projects right from project initiation to closure**

👉 **With your help and *active* participation***

Outline of Workshop

Introduction

Workshop Simulation

Conclusion

1. Approaches to Project Recovery
2. Why Team-Building?
3. The Team-Building and Project Re-Alignment Workshop
 - a) Re-visiting the past
 - b) Assessing the present
 - c) Building the future
6. Lessons Learned from Involving Teams in Project (Re-) Alignment
7. Q&A

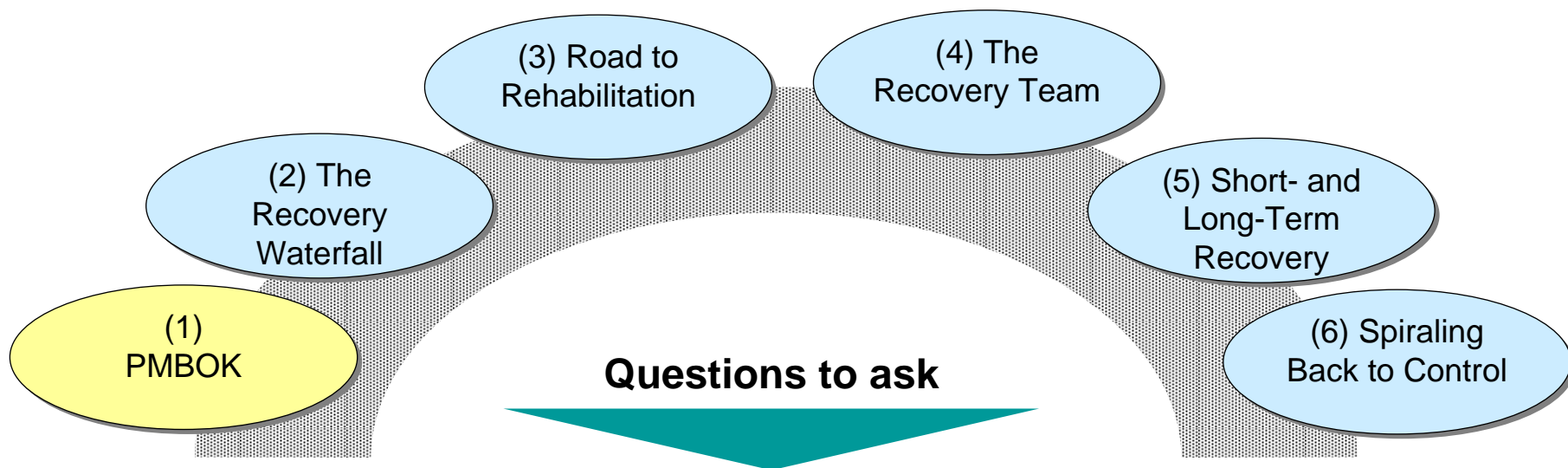


Approaches to Project Recovery

Overview of selected approaches



Several approaches to project re-alignment / recovery exist; for example:



What is the right framework?

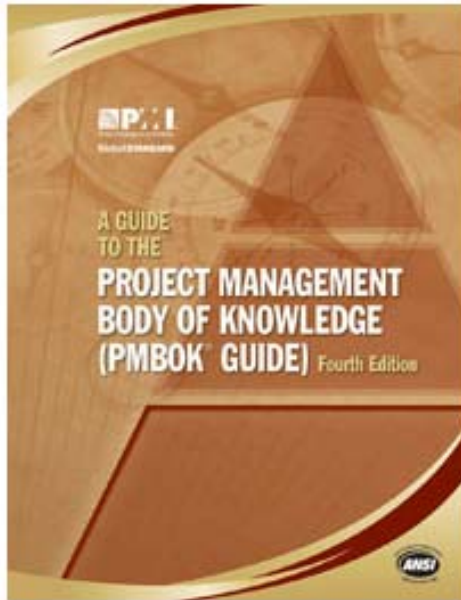
Who is driving project re-alignment?

Who is involved in re-aligning the project?



Approaches to Project Recovery

PMBOK and Methodology for Post Disaster Reconstruction



PMBOK = Standard of project management:
Framework for setting up and managing projects effectively

Project re-alignment / recovery:
Reference to assessment tools which can be used in analyzing and re-aligning a project

PMI's publication (2005), *Project Management Methodology for Post Disaster Reconstruction**

-> *Key to success on recovery projects*
= rigorous application of

- planning,
- monitoring,
- and control processes



PMBOK focuses on individual PM and rigorous application of PM methodologies.



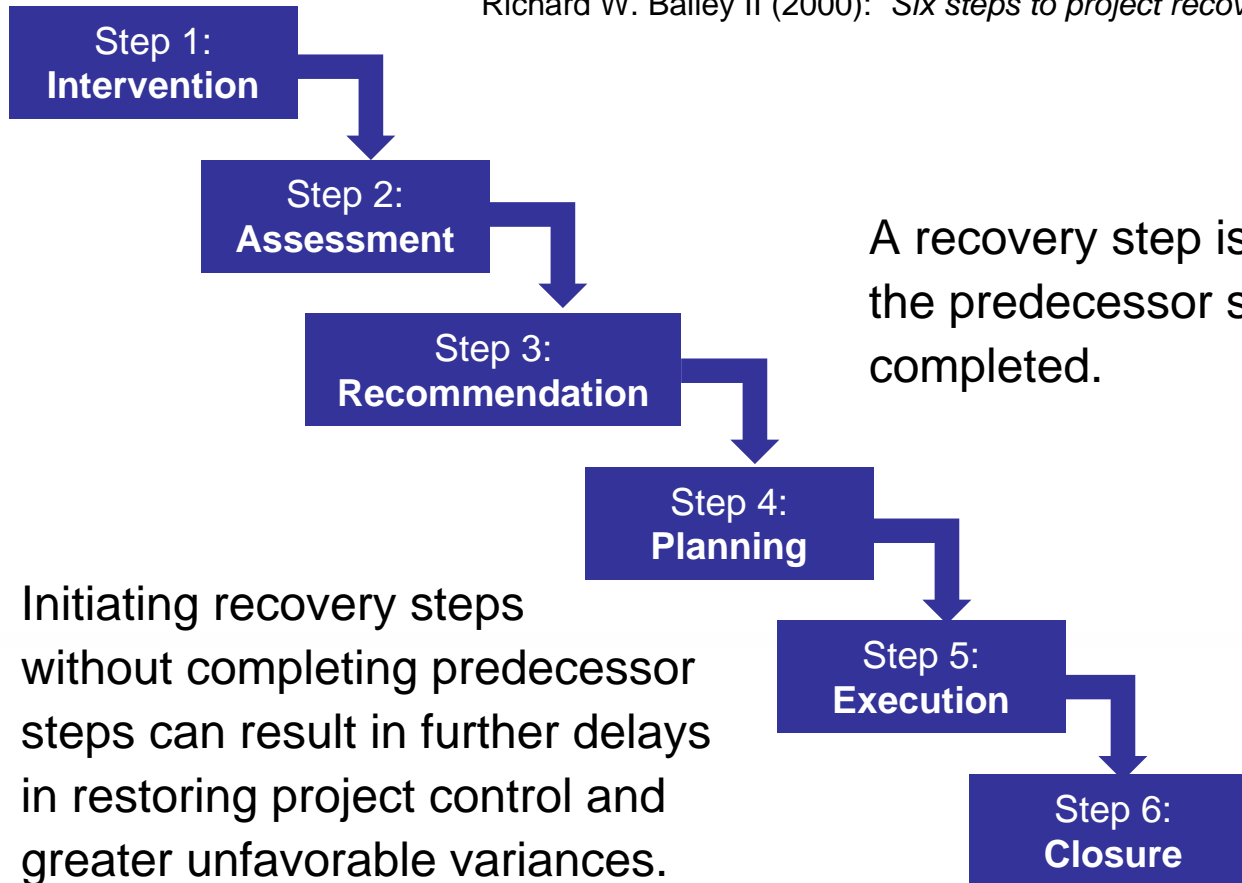
Approaches to Project Recovery

The Recovery Waterfall



“Project recovery is about quickly restoring project control.”

Richard W. Bailey II (2000): *Six steps to project recovery*. PM Network, May 2000



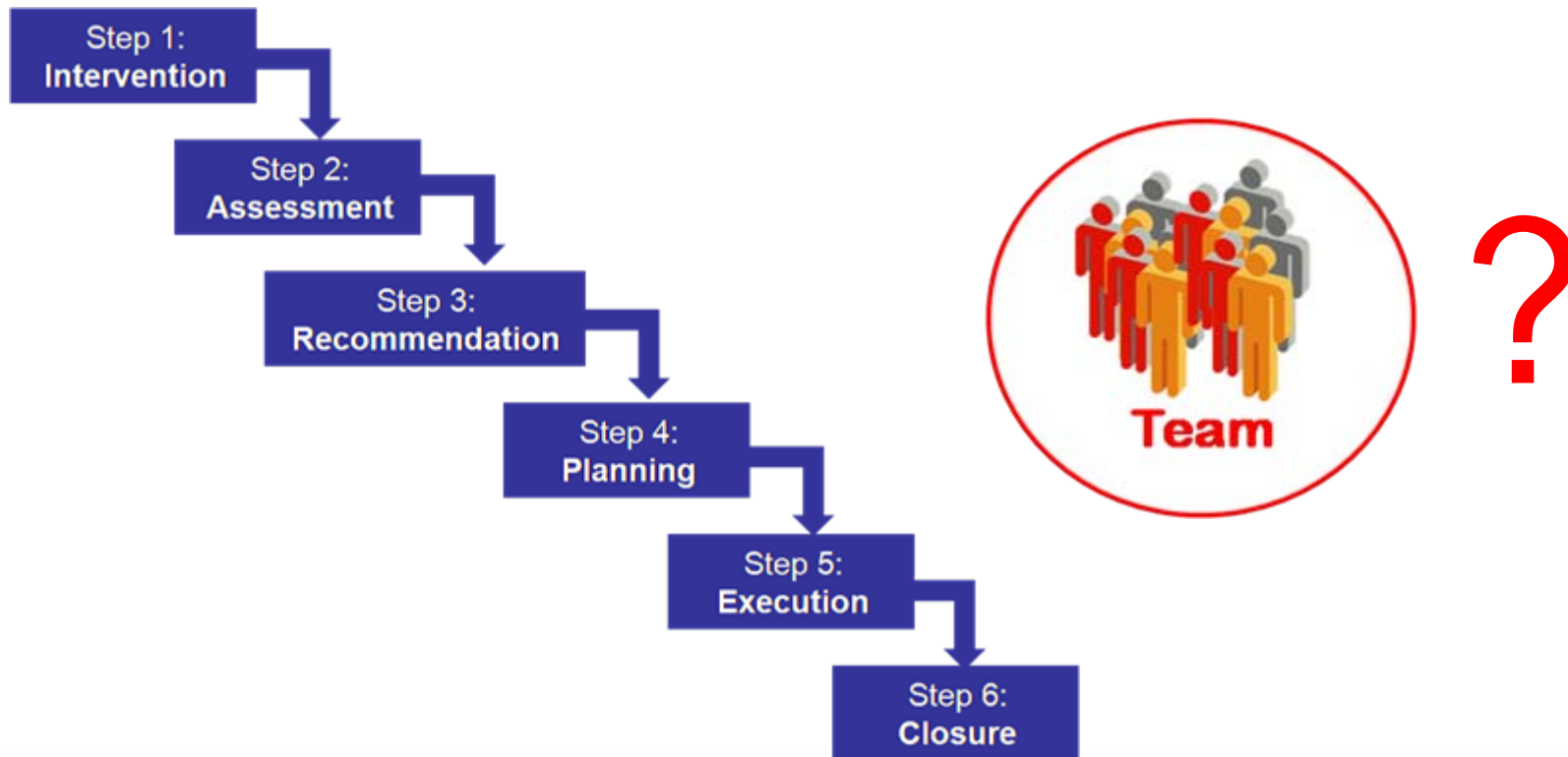
A recovery step is not initiated until the predecessor step has been completed.

Initiating recovery steps without completing predecessor steps can result in further delays in restoring project control and greater unfavorable variances.



Approaches to Project Recovery

The Recovery Waterfall - Critique



➔ The Waterfall Recovery Approach suggests simple steps. Yet, no mention of team or team-building in re-aligning a project. Instead, focus on PM and top-down recovery measures.



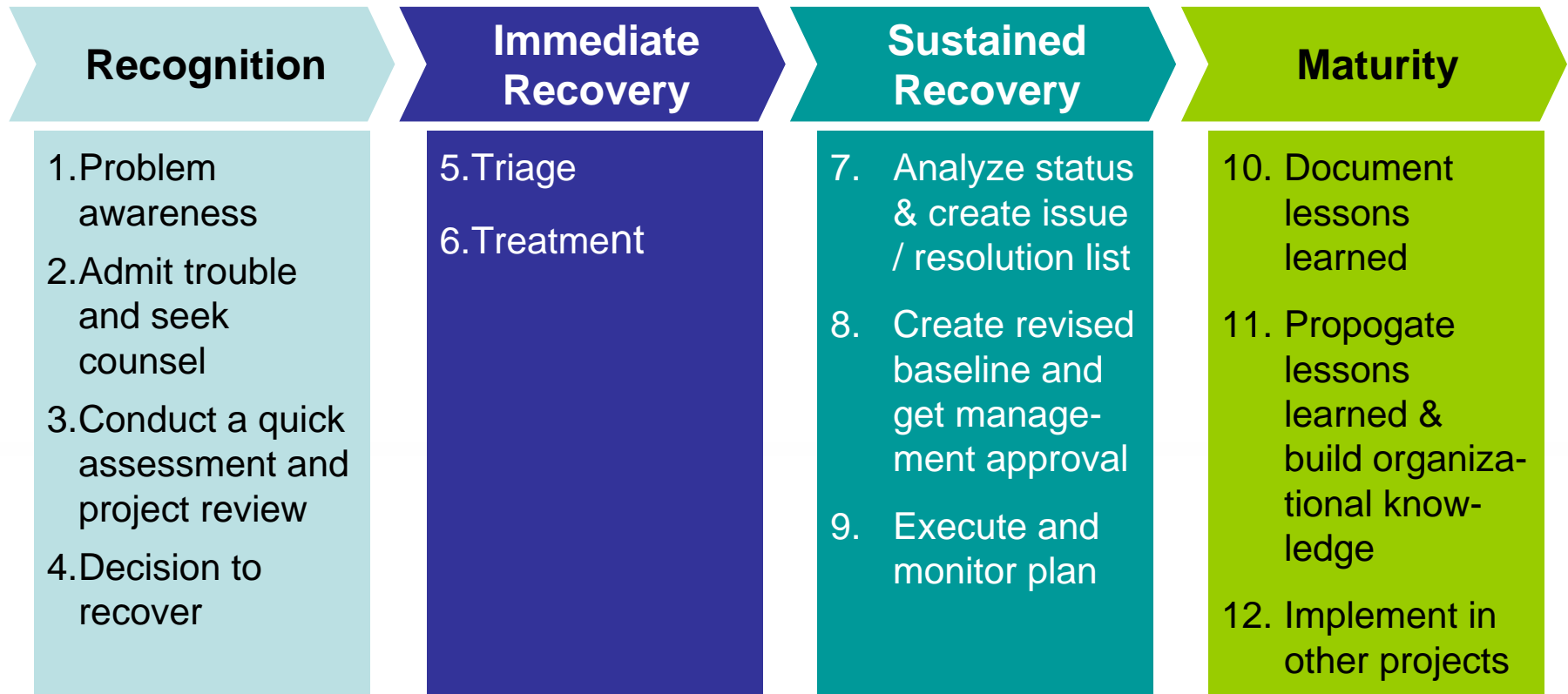
Approaches to Project Recovery

Road to Rehabilitation



Proposal of a four-stage 12-step framework for recovery and rehabilitation

Jagu Aiyer, T. M. Rajkumar, Douglas Havelka (2005): *A staged framework for the recovery and rehabilitation of troubled IS development projects*. Project Management Journal, Vol. 36. No.4, 32-43



Approaches to Project Recovery

Road to rehabilitation - Critique



Helpful and simple framework.

Yet, no word of team or team-building and project (re-)alignment.



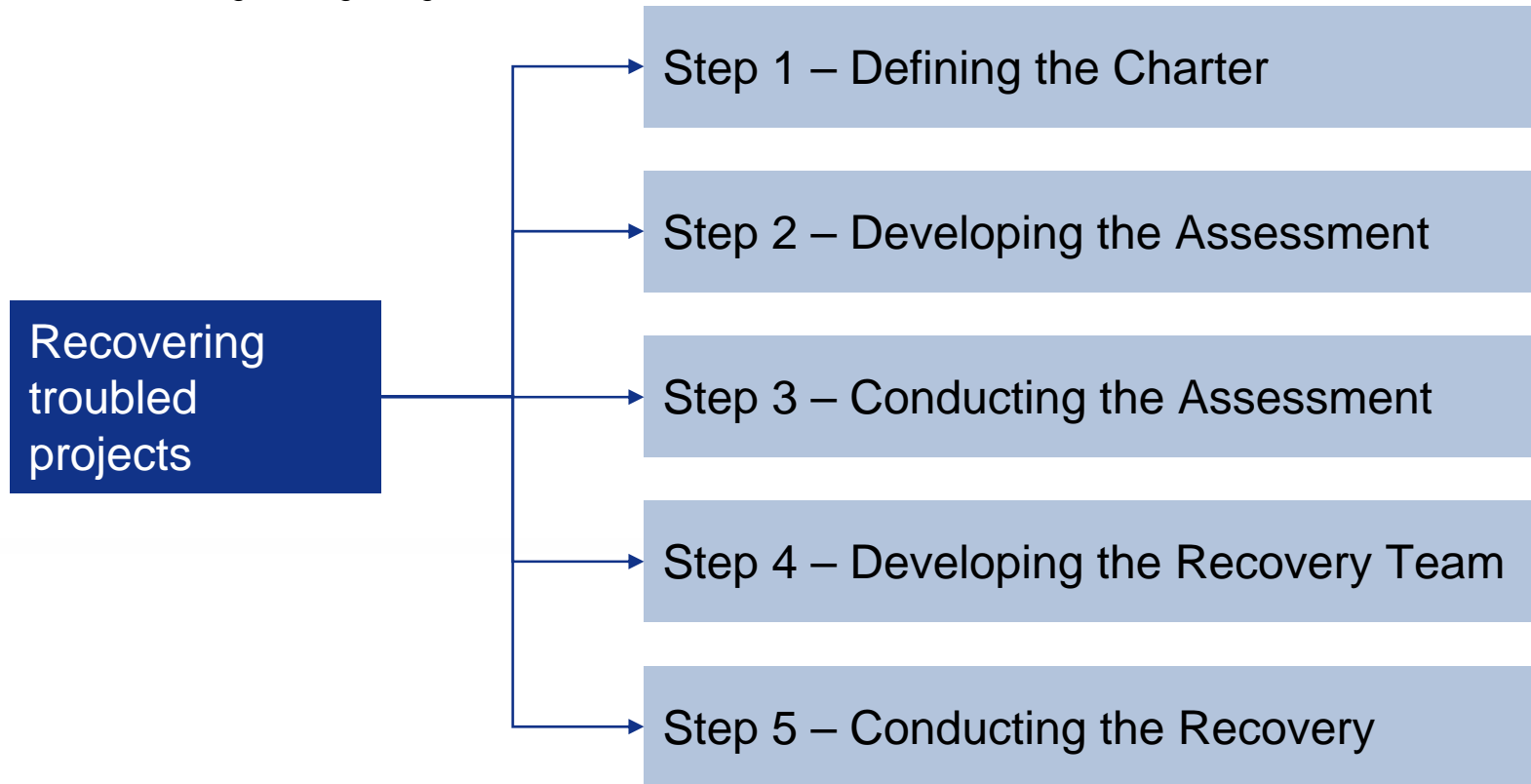
Approaches to Project Recovery

The Recovery Team



The concept of “rapid” assessment and recovery

J. LeRoy Ward (2007): *Five critical first steps in recovering troubled projects*. 2007 PMI Global Congress Proceedings, Hong Kong



Approaches to Project Recovery

The Recovery Team - Critique



The project recovery is executed by a Recovery Team (RT).



„The RT’s main goals in recovery are

- producing an achievable schedule
- re-establishing customer and management confidence
- re-baselining the project plan
- sorting project problems
- rebuilding the original project team”

➔ Approach calls for a *Recovery Team*, but not the existing team helping to recover a project.
Still, accounts for importance of original project team.



Approaches to Project Recovery

Short- and Long-Term Recovery



“Successful corporations must address the short-term problems and also pour a project management foundation for the future that will allow for continued growth and a reduction of “911” calls for project recovery.”

Thomas R. Block (1998): *Project recovery: short- and long-term solutions*. Proceedings of the 29th Annual Project Management Institute 1998 Seminars & Symposium, Long Beach, CA, USA

Short-Term Recovery

- (1) Assessment
- (2) Action Plan
- (3) Commitment
- (4) Project Standards
- (5) Coaching, Mentoring
- (6) Knowledge Transfer
- (7) Reinforcement Reviews

Long-Term Solutions

- 1 PM methodology
- 2 Project Office
- 3 Select approp. software
- 4 PM development
- 5 PM training
- 6 Mentoring / consulting
- 7 Senior management support is present and communicated



Approaches to Project Recovery

Short- and Long-Term recovery - Critique



Short-Term Recovery

- (1) Assessment
- (2) Action Plan
- (3) Commitment
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- (5) Coaching, Mentoring
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Long-Term Solutions

- 1 PM methodology
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➔ Focus on project management and top-down recovery. Lacks explanation *who* is conducting project recovery. No mention of team or team-building.

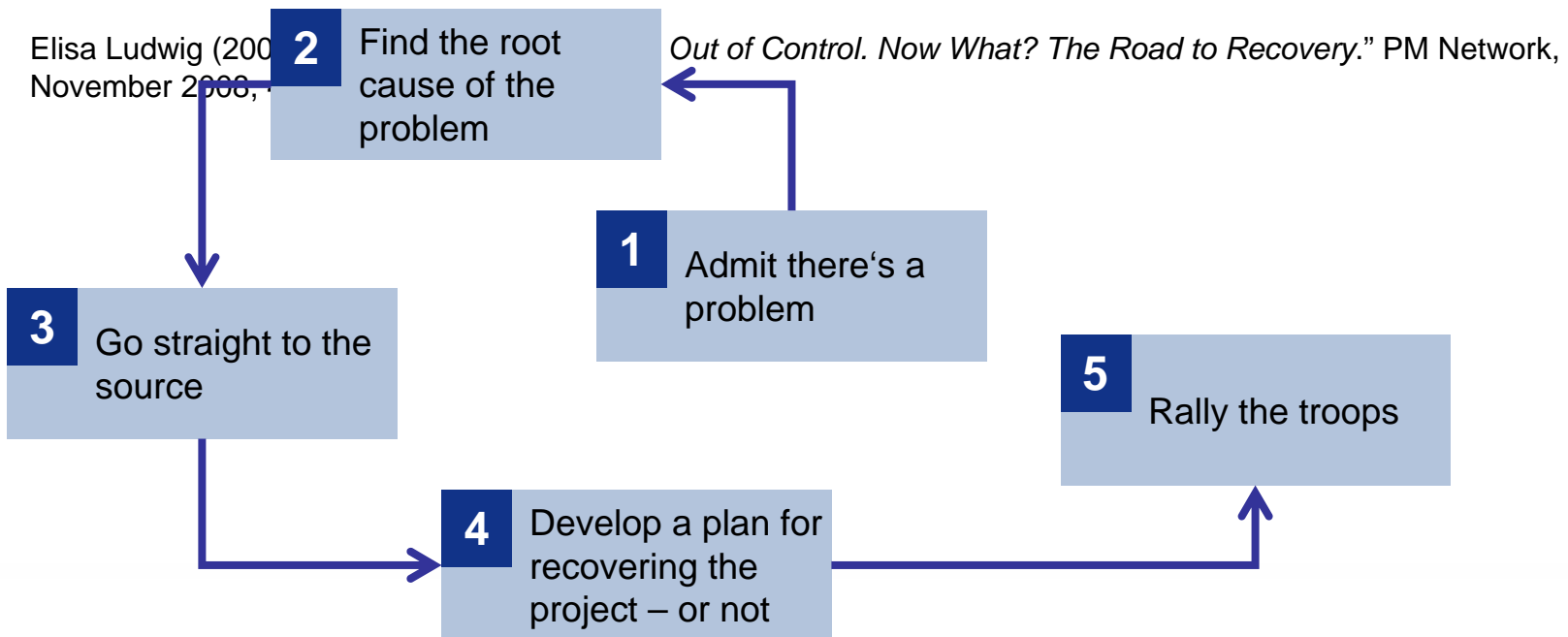


Approaches to Project Recovery

Spiraling Back to Control

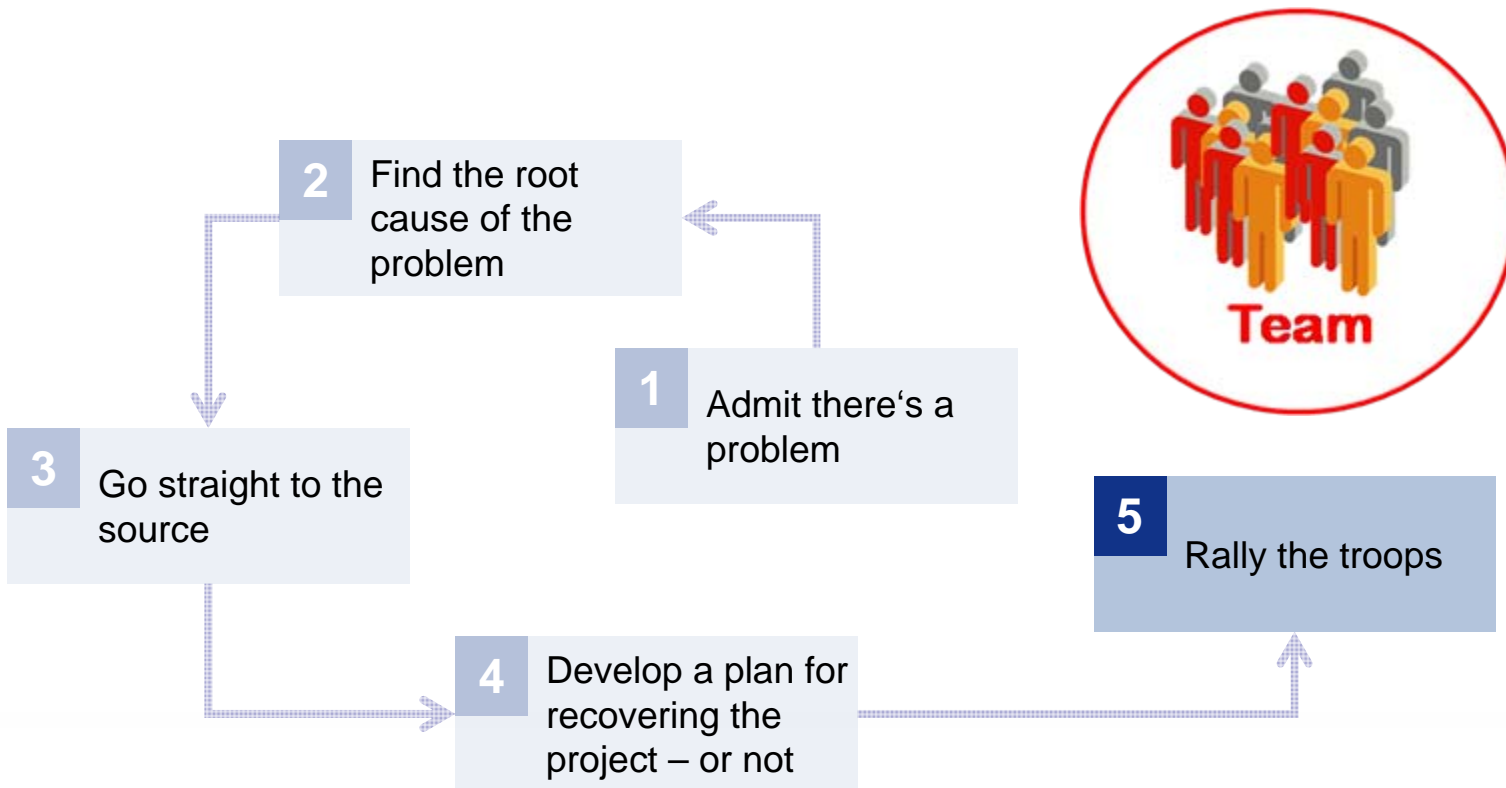


“Learn right from the beginning to avoid a situation where project recovery becomes necessary.”



Approaches to Project Recovery

Spiraling Back to Control - Critique



➔ Straight-forward approach. Yet, again, it is the PM who is leading and conducting the recovery effort. Active team involvement only at the end.



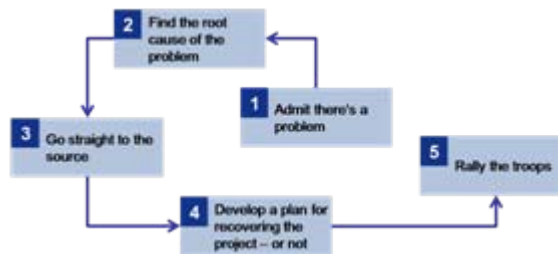
Approaches to Project Recovery

Summary



- Short-Term Recovery**
- (1) Assessment
 - (2) Action Plan
 - (3) Commitment
 - (4) Project Standards
 - (5) Coaching, Mentoring
 - (6) Knowledge Transfer
 - (7) Reinforcement Reviews

- Long-Term Solutions**
- | | | |
|---|------------------|---------------------------|
| 1 PM methodology | 2 Project Office | 3 Select approp. software |
| 4 PM development | 5 PM training | 6 Mentoring / consulting |
| 7 Senior management support is present and communicated | | |



Most common steps:

- (1) Admit there's a problem
- (2) Analyze the problem
- (3) Develop a recovery plan and execute it
- (4) Ensure sustainable, long lasting results

In addition,

- ✓ top-down or external execution of recovery efforts
- ✓ rigorous application of PM methodology



Approaches to Project Recovery Critique



No approach is explicitly referring to involving the team to re-align a project

Questions are:

- 1) Who is conducting the assessment?
- 2) How to conduct recovery?
- 3) Is it really always the project manager alone?



Teambuilding in Project Recovery?

Teambuilding is a foundation of good leadership and control



All mentioned project recovery approaches stress the **importance of good leadership and control** in recovering projects.

One of the most important foundations of control the PM has is his own team.



Teams realize projects, not single project managers alone.
= A PM leads and manages the project AND is a member of the team; a part of the whole.



A PM without a functioning team is acting without any foundation of control.
Teambuilding helps establish a foundation of control.



Effective project leadership always involves team building.



The PMBOK and Team-Building



The PMBOK cites fundamentals of teambuilding in Appendix G.2



“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. [...]

Outcomes of team building include mutual trust, high quality of information exchange, better decision making, and effective project control.”



Teambuilding and project re-alignment have to go hand in hand.



Project Re-Alignment and Teambuilding



Most common steps in presented recovery approaches:

- (1) Admit there's a problem
- (2) Analyze the problem
- (3) Develop a recovery plan and execute it
- (4) Ensure sustainable, long lasting results

Process of team building includes,

- clarifying the goal, and building ownership across the team and
- identifying the inhibitors to teamwork and removing or overcoming them

Team self-assessment

- current strengths as a team
- current weaknesses



Performance improvement

- identify any gap between the desired state and the actual state
- design a gap-closure strategy



Team building and project re-alignment workshop has to incorporate the above mentioned steps.



Outline of Workshop

Introduction

1. Approaches to Project Recovery
2. Why Team-Building?

Workshop Simulation

3. The Team-Building and Project Re-Alignment Workshop
 - a) Re-visiting the past
 - b) Assessing the present
 - c) Building the future

Conclusion

6. Lessons Learned from Involving Teams in Project (Re-) Alignment
7. Q&A



The Workshop Setup

The workshop consists of 3 parts covering past, present and future



Workshop with project team facilitated by third person who has to be able to act as mediator if necessary.

Simulation duration: ~25-40' per part

	Re-visiting the past	Assessing the present	Building the future
Purpose	Need to gain common understanding where we have come from	Need to admit that there's a problem and we are capable of re-solving it as a team	Need to build a common ground and direction how to move forward to succeed
Outcome	(1) List of categorized and prioritized lessons learned	(2) "Problem statement" (3) Recovery objective statement	(4) Re-fined roles and responsibilities (5) List of activities boosting team collaboration, learning, and project results

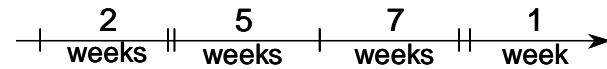


Case Project Situation*

Overview



Challenge: Replacing 2 „paper and pencil call centers” with a modern CRM call center in record time for an Online Bank



Project duration: 15 weeks

Project team: 8 full-time resources (1 PM, 1 architect, 1 business analyst, 5 developers), 2 part-time resources (testing experts)

Client: 1 full-time PM, 4 part-time resources (subject matter experts, no “techies”)

Present project phase:

1 week into Design phase. Overall good team atmosphere. People want to work on project.

Top issues and risks (for a detailed list see next page):

- Lack of agreement on a common vision among project team members
- Scope is not closed, is in a state of flux and regularly changing
- Roles and responsibilities are not mutually agreed
- Quality standards have not been defined prior to development



Case Project Situation

Issues and risks – stakeholders & project management



Stakeholders

- There is lack of agreement on a common vision among project team members
- There is a lack of agreement among project team members on project drivers, priorities or expectations
- There is no escalation chain in place, or it is not functioning correctly
- Client participation during development will be limited due to timing, geographic distance, etc.
- Client Sponsor is not completely dedicated to the project or may have other distractions; possibility that the Client Sponsor may leave or be changed prior to the completion of the project

Project Management

- Scope continues to expand after agreement on scope was reached
- Overall project schedule is very aggressive
- The project is using new technology, or new versions of existing software that none of the team members have experience with
- The project cannot leverage frameworks or existing processes / procedures
- There is a lack of documentation or knowledge for the product or application to be used
- No previous metrics are available for estimation due to lack of experience with technology
- There are significant dependencies on clients or other third parties



Case Project Situation

Issues and risks – team and integrated solution quality



Team

- Some or all of the key skills or resources may not be available on the dates required.
- Roles and responsibilities are not mutually agreed
- The project is having difficulties filling certain key positions with the proper skills and abilities required
- There is a significant transition of project team members between phases (challenges of knowledge transfer, reasons behind decisions, etc.)
- There has been turnover among key project personnel; or there may be a strong possibility of future turnover

Integrated Solution Quality

- The exit criteria from the previous phase has not been met
- Quality standards have not been defined prior to development
- Quality standards are not monitored during development
- Application is difficult to understand and test due to complexity
- There is not a well defined client quality assurance / acceptance process



Case Project Situation

Supplementary scenarios 1/2



For the exercises, you *may* also build in some of the following scenarios into your simulation:

Scope and expectations:

- Definition of business objectives incomplete
- Project objectives, deliverables, time frames, risks and critical success factors are in writing and described explicitly, but sponsor is unwilling to share information with complete team due to confidentiality concerns
- Project objectives using technical language, i.e., not easily understood by business people
- Requirements (processes and functionalities) not prioritized; client says everything is priority 1

Planning and timing - estimation assumptions:

- 8 hours of planned tasks = 1 working day
- Estimates based on experience of lead architect
- GUI development: design 10%, coding 75%, testing 10%, documentation 5%.



Case Project Situation

Supplementary scenarios 2/2



Risk management:

- Conducted by project manager; results documented in monthly report shared with stakeholders and team

Standards, templates and infrastructure:

- Lack of project management templates
- 8 person team using 1 room; no permanent meeting room available
- Highly individualized folder structure
- No versioning control in place
- No common file naming conventions

On a positive note:

- Overall good team atmosphere
- Attractive project location
- Team mix OK, has never been optimal in other projects



The Workshop Setup

Step 1: Re-visiting the past



The team reviews what has happened in the past.

	Step 1
Purpose	Need to gain common understanding where we have come from
Outcome	(1) List of categorized and prioritized lessons learned

Session Objectives

(1) Review

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

(2) Categorize input into sections:

- a) vision / project objective(s),
- b) collaboration,
- c) learning culture,
- d) results / deliveries



The Workshop Setup

Step 1: Re-visiting the past - Instructions



Form groups of 5-8 people. Each group will get limited # of cards on which they write their answers to the questions

(1) what went well thus far?

(2) what did not go well? What can we do better and how?

Categories of answers:

a) vision / project objective(s),

b) collaboration,

c) learning culture,

d) results / solution quality

Total expected duration:

Sorting: 5'

Brainstorming: 10'

Categorizing: 5'

Group: Presentation to audience: 10'

TOTAL: ~30'

Group is to choose 4 answers to each question.

Cards are collected and sorted by facilitator and prioritized by the audience



The Workshop Setup

Step 2: Assessing the present



The team analyzes the present situation.

	Step 2
Purpose	Need to admit that there's a problem and we are capable of re-solving it as a team
Outcome	(2) "Problem statement" (3) Recovery objective statement

Session Objectives

- (1) Systematically analyze the present situation
- (2) Identify source of problems
- (3) Outline resolution and expected benefits
- (4) Derive critical success factors
- (5) Develop recovery objective statement



The Workshop Setup

Step 2: Assessing the present - Instructions



(1) Create a “Problem Statement”

Meet in previous groups to discuss categories of problem statement stating

- o top issues and risks,
- o who is affected,
- o what the impacts of the issues are,
- o what needs to be done to resolve the situation,
- o what benefits to expect,
- o what critical success factors need to be met.

Total expected duration:

Problem Statement: 15'

Presentation and prioritization: 10'

Recovery objective statement: 10'

Presentation and prioritization: 10'

TOTAL: ~45'

Develop problem statement

Present results to audience

Group discussion and prioritization of problem statements by audience

(2) Develop recovery objective statement

Meet in previous groups. Develop recovery objective statement based on results from (1). Make sure objective statement is SMART.

Present results to audience

Prioritization and selection of recovery objective statement by audience



The Workshop Setup

Step 3: Building the future



The team jointly agrees on re-alignment measures.

	Step 3
Purpose	Need to build a common ground and direction how to move forward to succeed
Outcome	(4) Re-fined roles and responsibilities (5) List of activities boosting team collaboration, learning, and project results

Session Objectives

(1) Individual level:

Conduct team norming (individual roles and responsibilities, expectations)

(2) Team level:

Agree on additional team building events and activities which help re-align and stabilize the project



The Workshop Setup

Step 3: Building the future - Instructions



(1) Re-fined roles and responsibilities

Identify roles and responsibilities in group / audience, capture results on flip charts spread throughout conference room

Discuss possible expectations of team members

(2) List of activities boosting team collaboration, learning, and project results

Breakouts identify 1-2 top activities to boost and secure

- a) collaboration,
- b) Learning,
- c) project results

Presentation of results and discussion

Prioritization of results in audience

Total expected duration:
Sorting: 5'
Brainstorming: 5'
Categorizing: 5'
Group: Presentation to audience: 10'
TOTAL: ~25-30'



Workshop Results (1/2)

Team-building served as a means to re-align a project



	Re-visit the past	Assess the present	Build the future
Purpose	Need to gain common understanding where we have come from	Need to admit that there's a problem and we are capable of resolving it as a team	Need to build a common ground and direction how to move forward to succeed
Outcome	List of categorized and prioritized lessons learned	(1) "Problem statement" (2) Recovery objective statement	(1) Re-fined roles and responsibilities (2) List of activities boosting team collaboration, learning, and project results



The workshop has shown / resulted in

✓ **Results**

✓ **Team-building:**
team assessed situation together, identified problems, categorized them, found resolutions.

✓ **Team accountability,**
team commitment

Workshop Results (2/2)



Most common steps in presented recovery approaches:

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

Process of team building includes,
✓ clarifying the goal, and building ownership across the team and
✓ identifying the inhibitors to teamwork and removing or overcoming them

Team self-assessment

- ✓ current strengths as a team
- ✓ current weaknesses



Performance improvement

- ✓ identify any gap between the desired state and the actual state
- ✓ design a gap-closure strategy

➔ **Team building and project re-alignment workshop has incorporated all of the above mentioned steps.**

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Lessons Learned

Team-building in project (re-)alignment is an ongoing process

The PMBOK points out

„ While **team building** is essential during the front end of a project, it is an **ongoing process**. Changes in a project environment are inevitable. To manage these changes effectively, a **continued or renewed teambuilding effort** is required.”



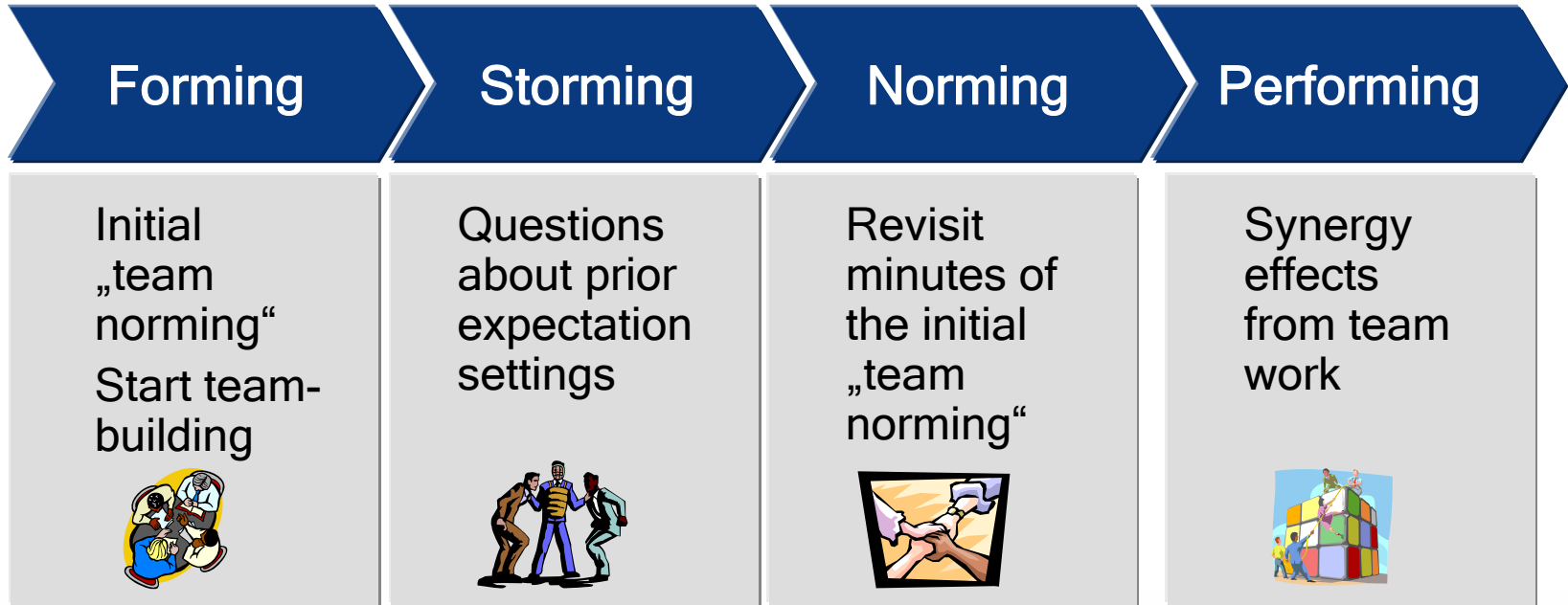
Spend sufficient time to build your team

☞ This help align your project right from the start

Lessons Learned

Use the 4 team development stages to (re-)align projects

Beware that every team will go through 4 distinct phases.



AND: Consider things change over time:
Many long-standing teams will go through these cycles many times as they react to changing circumstances.

Lessons Learned

Team-building in environments of agile software development

Agile software development refers to a group of software development methodologies based on iterative development, where requirements and solutions evolve through **collaboration between self-organizing cross-functional teams** [Wikipedia].



Agile methods generally promote

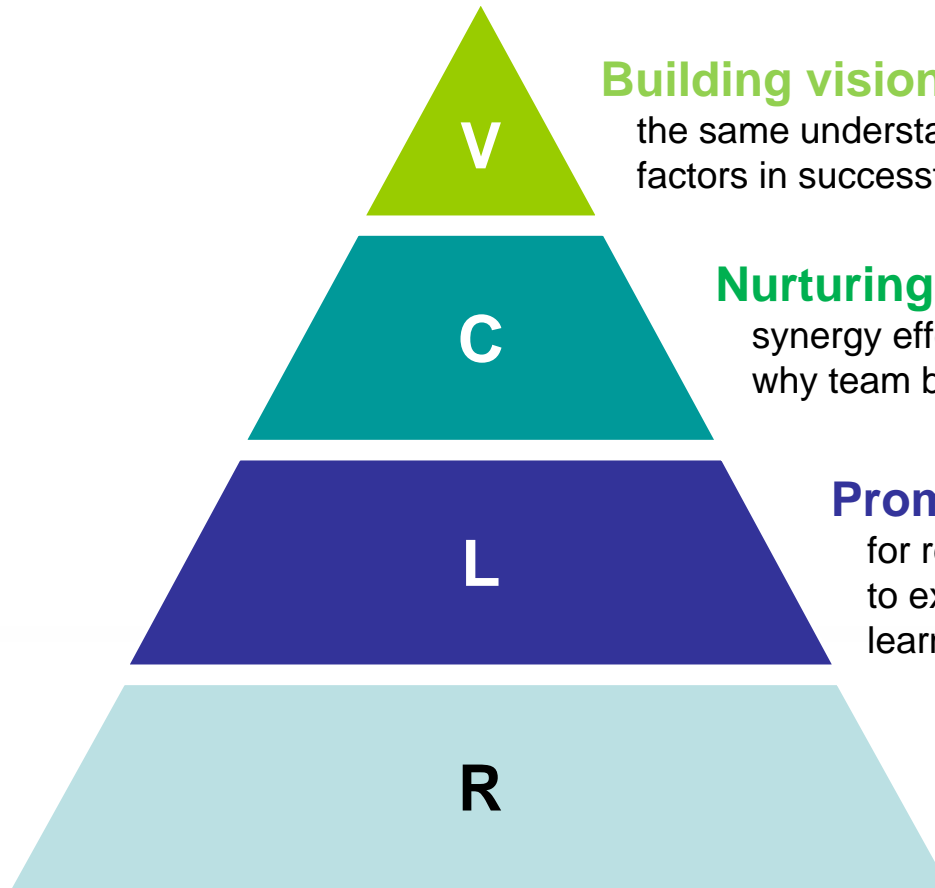
- a leadership philosophy that encourages **teamwork**,
- **self-organization** and accountability,
- a set of engineering best practices that allow for **rapid delivery of high-quality software**

➔ The presented approach of team-building as a means to re-align a project can be used, too. Indeed, team building is most important in agile settings.

Lessons Learned

Teambuilding as a means to re-align a project requires effective leadership

The VCLR Principle: Effective leadership is based on 4 pillars:
Vision, **C**ollaboration, **L**earning, and **R**esults



Building vision: Sharing a common vision and goals and having the same understanding how to achieve it are one of the key factors in successfully re-aligning a project.

Nurturing collaboration: A performing team yields synergy effects; the impossible becomes possible. This is why team building is crucial.

Promoting learning: Effective leaders are open for receiving and giving feedback. It requires courage to explore new avenues and to make mistakes and to learn from them.

Ensuring delivery: Delivering results is both a prerequisite and an outcome of effective leadership.

Q&A



☞ Please contact me after the workshop in case you have any additional questions



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