2010 PROJECT MANAGEMENT SYMPOSIUM ROUNDTABLE DISCUSSION RECAPS

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AGILE CAFÉ

Facilitator(s): *Chris Koo, Edward Jones and Laurie Douglas, Reinsurance Group of America*

Discussion Highlights

C = Challenges / S = Solutions

Using Agile when other internal + vendor teams are still using waterfall

C: Dependency on other projects & impacts to changing requirements
S: Educate teams on Agile

C: Developers on multiple projects (waterfall & Agile)
S: Jumping in and starting vs. documenting

C: Isolating vendor portions
S: Fixed deliverables with vendors

C: Gathering vendor requirements up front
S: Make Agile requirement of vendor selection

C: Determine where value lies with Agile vs. waterfall
S: Adopting one methodology or carve out areas that are one methodology

C: IDIQ & Agile – how to stay on top of requirements
S: Define incremental pieces

C: Are projects/programs suitable?
S: Hold non-Agile responsible to meet milestones

C: More communication on changes requirements
S: Define/plan infrastructure foundation

Training

C: Don't want to adopt new process
C: Resistance to change
C: Resources – too busy to learn new process

C: Funding & trainers
S: Bring in from outside

C: Management buy-in
C: Comprehension – learning new process
C: Selling to management with benefits over existing methods
C: Management across departments
C: Building the training: how it will be presented, content, scheduling, metrics

System Design (e.g., screen flow, DB, architecture & scalability)

S: Adapted processes (design, etc.) to be hybrid between agile and unified process
S: Prototyping is critical
S: Retrospectives help. It becomes easier over time

Selling Agile to Senior Management

C: Past failed attempts
S: Put Agile Oversight committee in place
S: Identify and leverage evangelists

C: Previous out of control cost expenditures
S: Cost ceiling (project budget) in place
S: Will see value sooner
S: Welcome changes from customers

C: Addressing grassroots (project teams trying Agile without permission)
S: Share what grassroots project teams are doing
S: Tell management value points/potential
S: Must get teams training

C: Executives not familiar with Agile
S: Discuss with management what it takes to deliver value results
S: Start with a pilot
S: Gather business/IT executives together
S: Have the PMO help drive new work approaches
S: Find out how other companies are doing Agile

C: Gaining commitment from the business to spend time on the Agile project approach
S: Educate key sponsors on approach
S: Identify key value points that demonstrate compelling message

C: Continuing to drive Agile in corporations
S: State Who, What When, Where, and Why when explaining Agile
S: Compare workflow results
S: Share success stories
S: Sell middle management (they'll push it up)
S: Hold lunch-and-learns, webinars, job aids
S: Ask Agile experts to join you at the table with executives
S: Attend training or seminars (conferences)
S: Develop a business case

Changes to organization, roles and responsibilities, skills

C: Focused resources
S: Employ fixed Agile teams that work cross-projects
S: Source externally and at vendors to develop

C: Other responsibilities in support, etc.
S: 75% focus is not reality; Agile can survive with less – hold accountable by deliverables

C: Cross-functional skills need to be shared across Agile and waterfall
S: PMO to provide guidance on which to be Agile and impact to other waterfall projects

C: Management understanding of Agile vs. other methodology resource usage

C: Agile experience in the market not consistent
S: Create Agile specific interview questions

C: How do we employ Agile in virtual organizations / environments?
S: Global skills in communicating with other countries, cultures in the virtual environment

C: Finding talent to staff Agile; higher rate of pay

C: How far do we go into epic before starting sprint?
S: Far enough for developers to create a design framework
S: Different focus on planning – understand framework and vision of technology
S: Split requirements and data relationships into separate sprints

C: Law firms have 350 partners; makes prioritizing difficult
S: Pick the right business sponsor that has great relationships with other business owners
S: Define clear role/responsibility for product backlog updates

C: Budget process considerations
C: Expense involved with virtual scrums – video, audio

C: Agile seems to be software centric in those that employ Agile
S: Seek experienced practitioners of Lean – which is employed more heavily for infrastructure / construction industries.

Metrics / EVM

S: Break down iterations to 3-week scrums to provide additional clarity
S: Be agile in metric tracking - what is valuable to the team and to senior leaders
S: Don't let metrics compromise your Agile values
S: May need to educate co-workers on Agile metrics
S: Collaboration tools help
S: Use stories to track progress / EVM
S: Train management to understand Agile metrics and waterfall

Overall ways to overcome challenges

S: Get management buy-in
S: Pilot program to try it out
S: Show benefits
- Customer satisfaction

- Data

S: Personal development goals
S: Demonstrate the value of focus and finish vs. multi-tasking
S: Follow-on coaching to enhance learning after training
S: Customize Agile training for your organization and how people learn

SIUE PM Symposium

Facilitators:

Laurie Douglas (RGA)
Chris Koo (Edward Jones)
Blake Moyer (Edward Jones)
Joan Romine (Boeing)

What's on the Menu?

Appetizer:	AGILE Primer (15 min)
Main Course:	AGILE Challenges & Best Practices from YOU! (45 min; "taste tests" every 15 min)
Dessert:	Your Responses (15 min)

15 min AGILE

We are uncovering better ways of developing software by doing it and helping others do it. Through this work we have come to value:

Individuals and interactions over processes and tools
Working software over comprehensive documentation
Customer collaboration over contract negotiation
Responding to change over following a plan

That is, while there is value in the items on the right, we value the items on the left more.

System Development Life Cycle

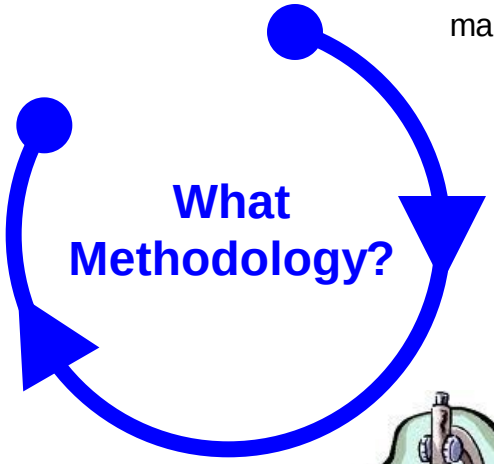
Initiation
Sponsor identifies a need and defines scope / benefits.

Planning
Define requirements that support scope and develop project management plan.

Maintenance
Execution knowledge transition; maintain system in production; conduct post-implementation reviews.

Design
Create system design deliverables; focus on how to deliver required functionality.

Implementation
Implement system into production environment; resolve problems.



Development
Convert design into a complete system; install system components into testing environments; prepare for testing.

Verification / Test
Test developed system against requirements; fix defects; prepare for implementation.

Sequential (e.g., Waterfall)

Initiation
Sponsor identifies a need and defines scope / benefits.

Planning
Define requirements that support scope and develop project management plan.

Design
Create system design deliverables; focus on how to deliver required functionality.

Development
Convert design into a complete system; install system components into testing environments; prepare for testing.

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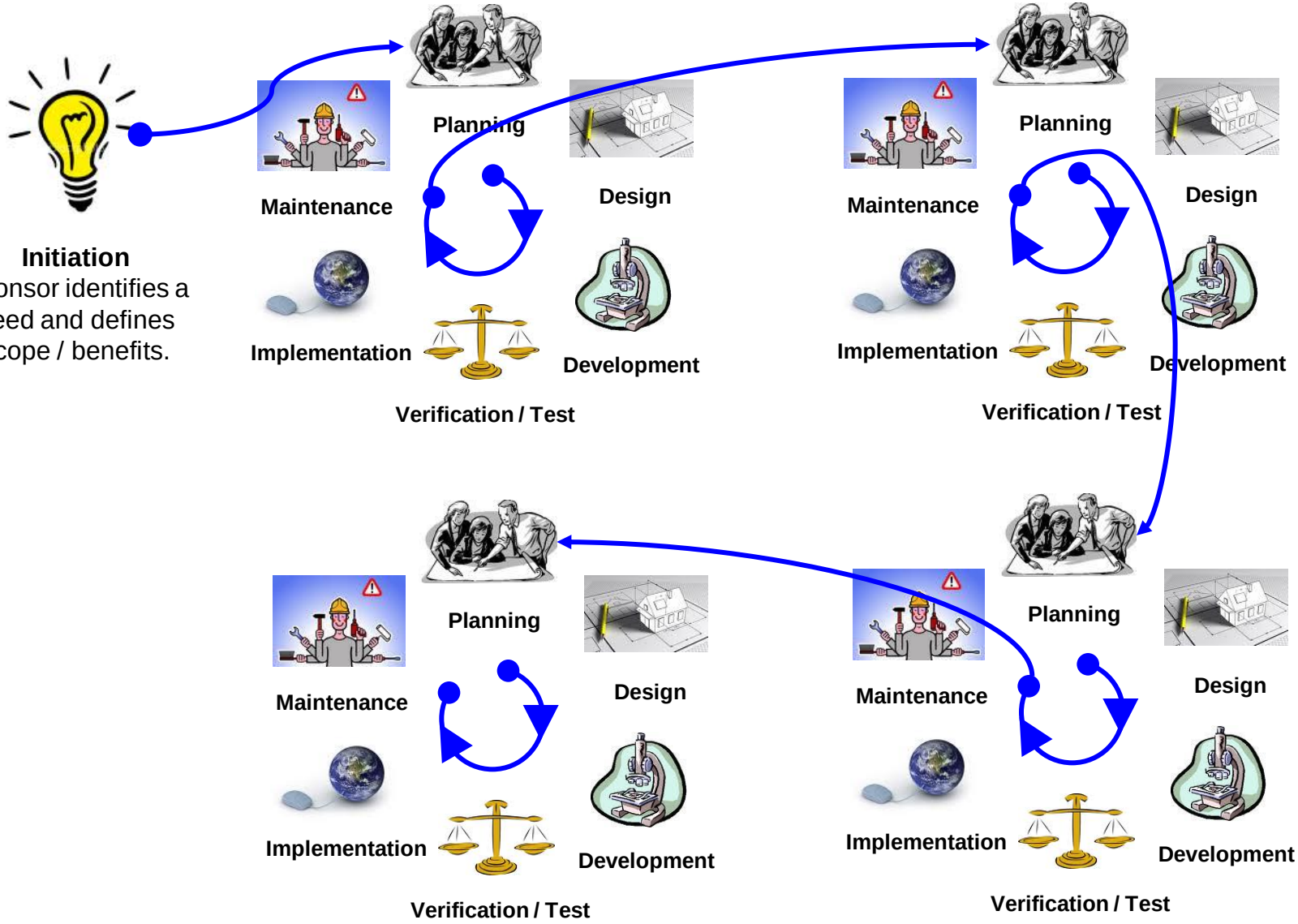
IID & AGILE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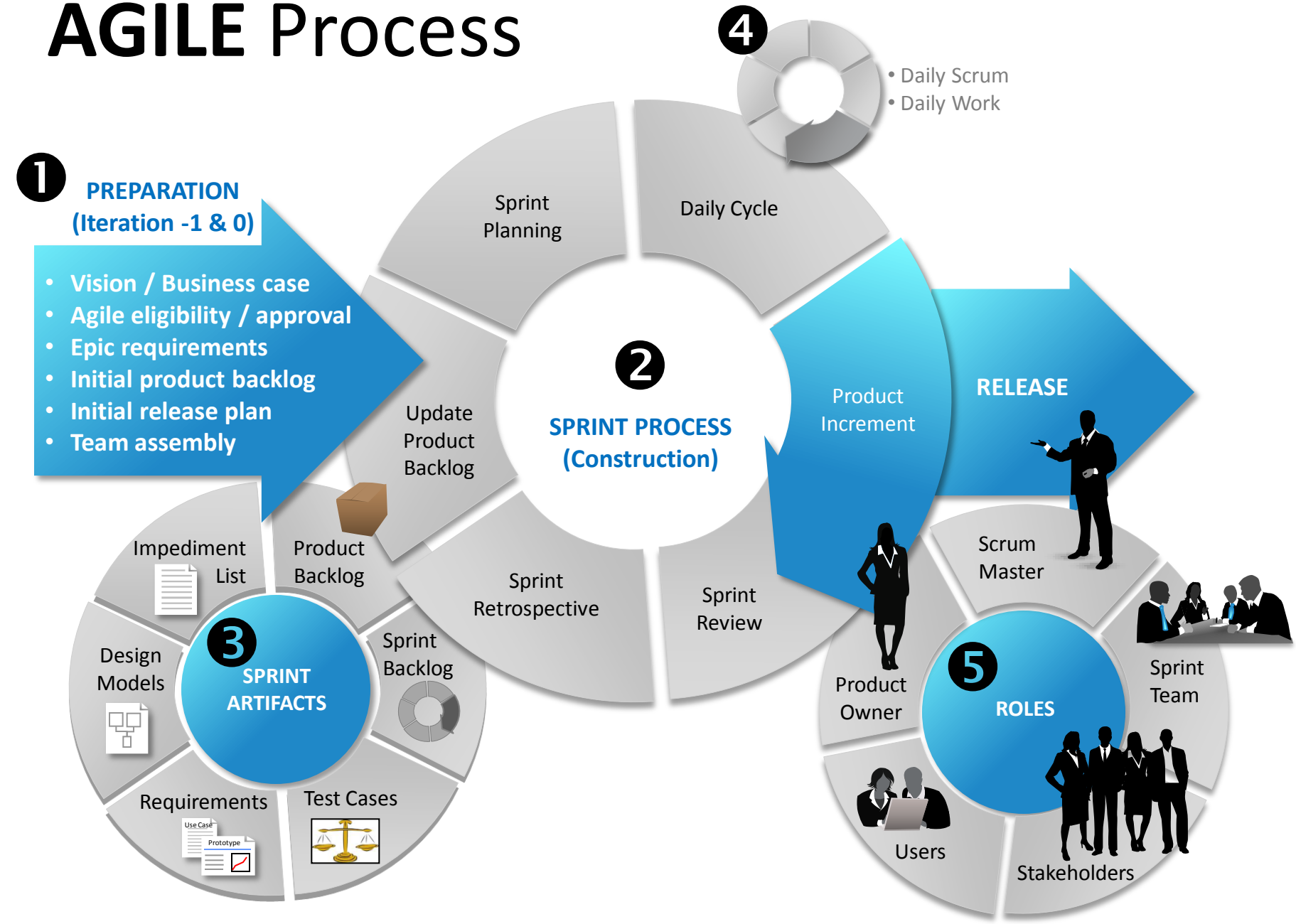
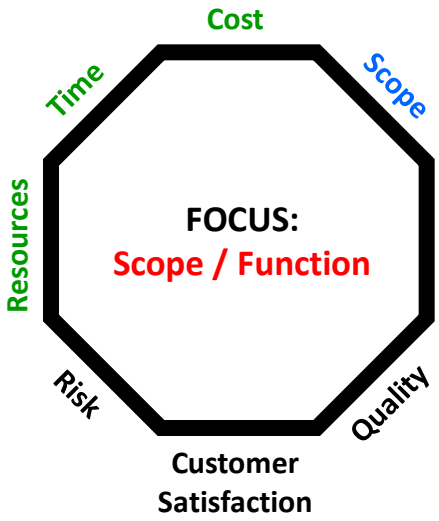
Implementation
Maintenance

AGILE Process



Mindset Shift - Scope

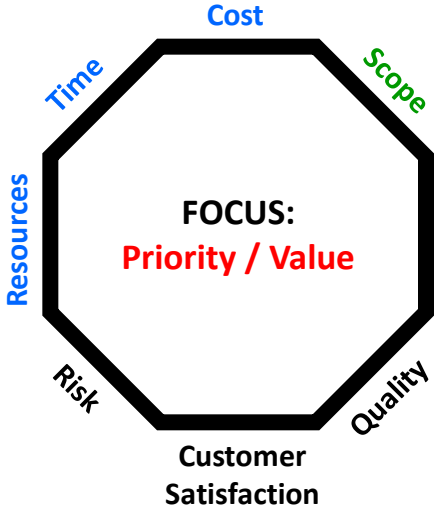
Waterfall



Fixed Constraint

Flexible Constraint

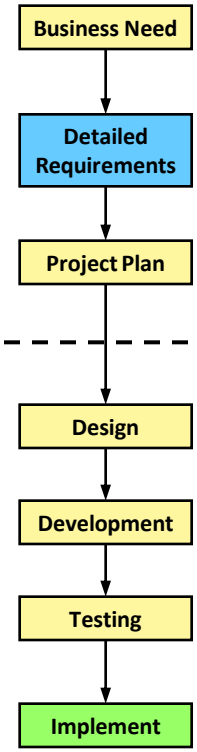
AGILE



Mindset Shift - Requirements

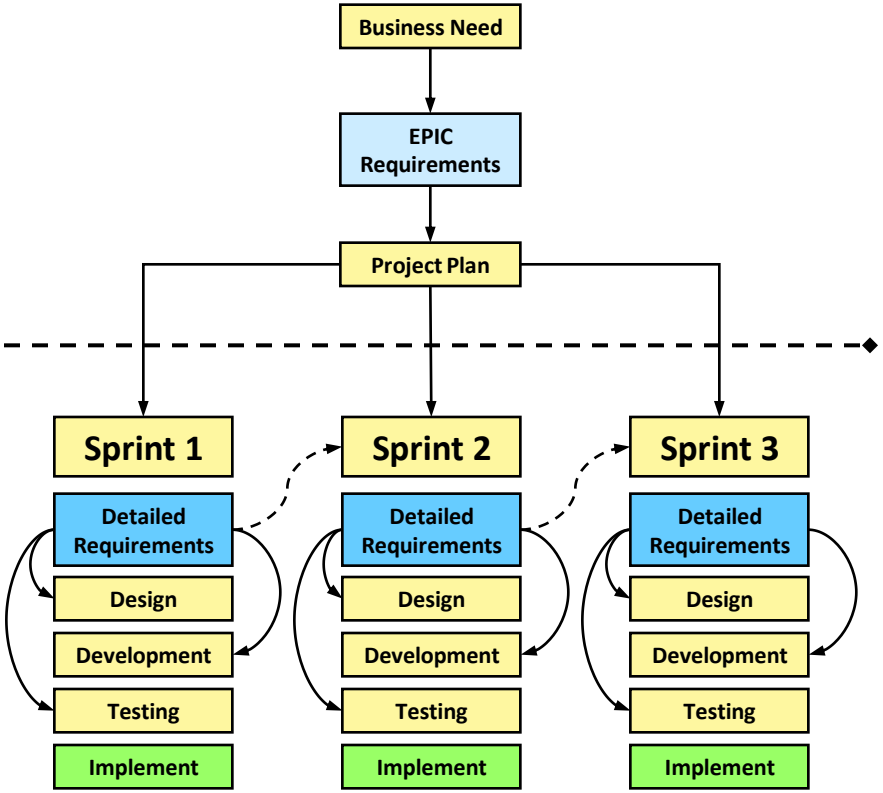
Waterfall

"Pay now…"



AGILE

"…or pay later"



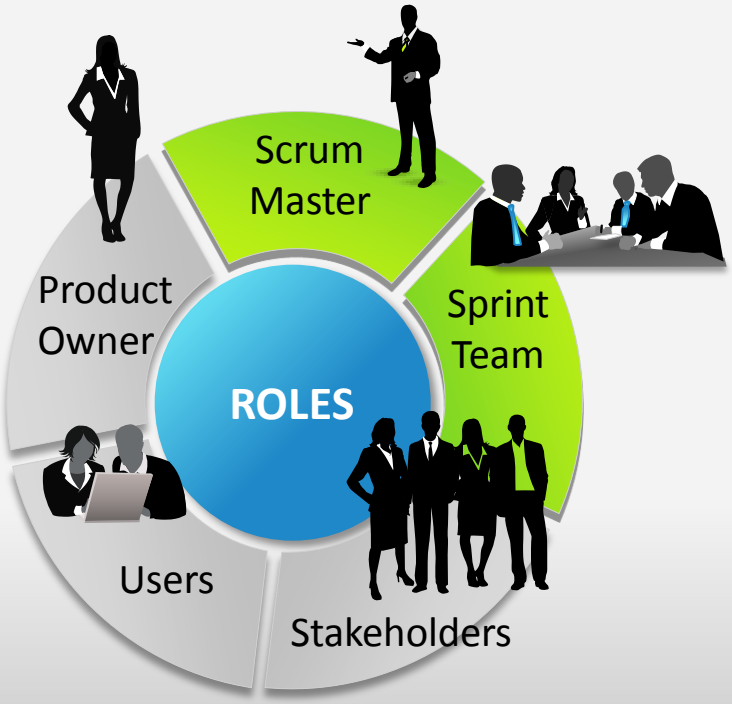
AGILE – Daily Scrum

SCRUM - 15 min. Daily Meeting

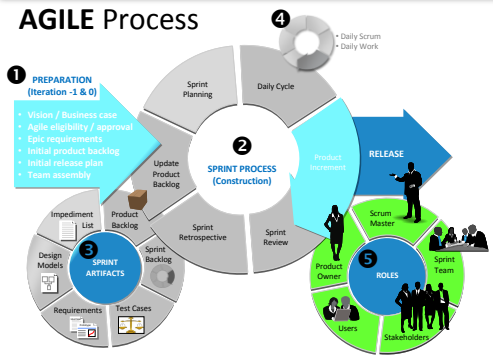
Sprint Team discusses:

A. What did you yesterday?
B. What will you do today?
C. Are their impediments in your way?

AGILE - Roles



AGILE Process



Café Question

What are the challenges (for each table topic) when adopting an AGILE process, and what would be good ways to overcome those challenges?

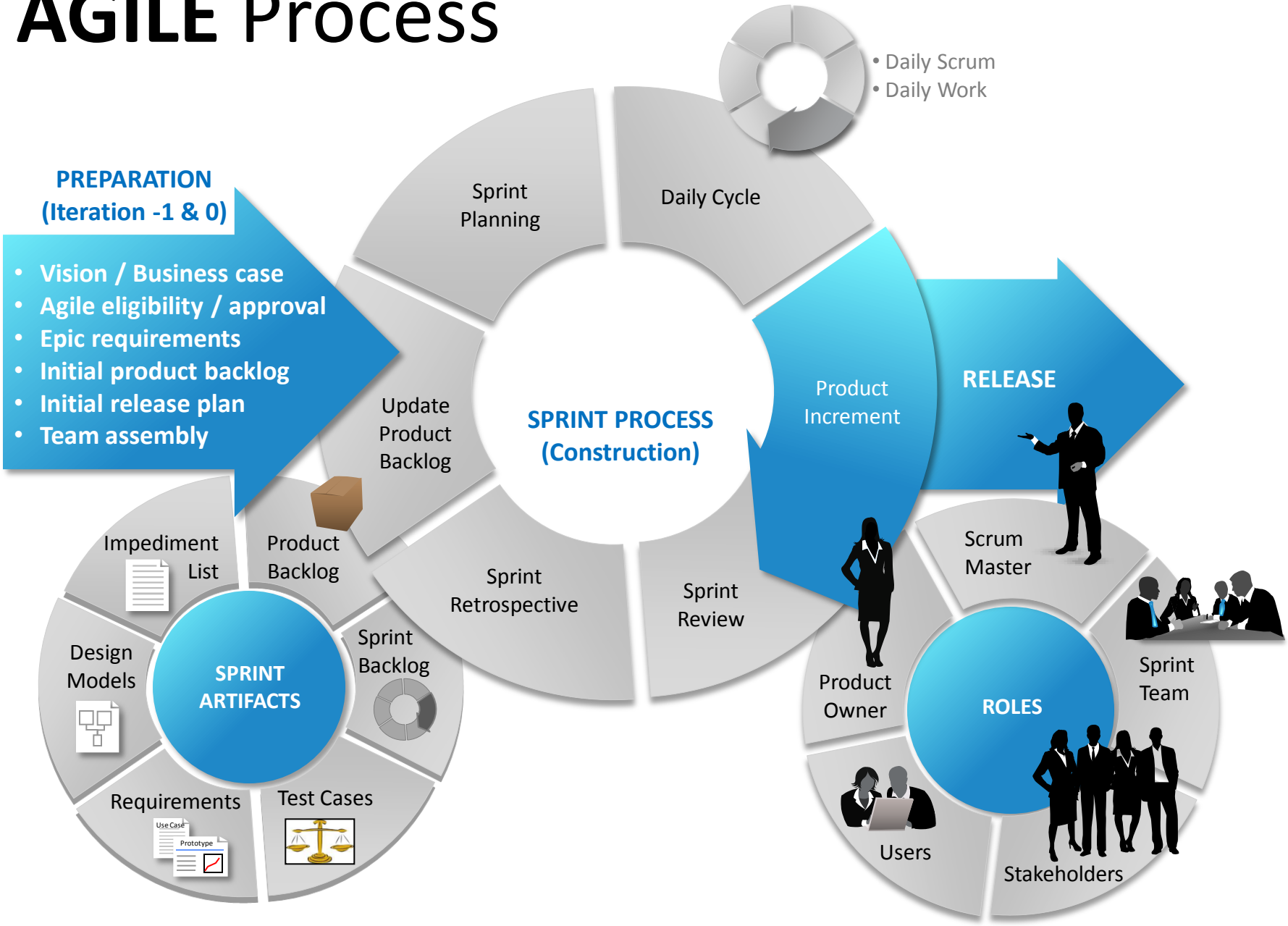
(See Handout)

Table Questions

1. Selling AGILE to senior management
2. Using AGILE when other internal & external (vendor) teams are still using Waterfall or other methodologies
3. Changes to organization, roles/responsibilities, skills
4. Metrics / EVM
5. Training curriculum
6. System design (e.g., screen flow, architecture, database, scalability)

(See Handout)

AGILE Process



Café Wrap-Up

- Facilitator Summaries (Questions 1-3)
- All responses will be posted in main hall
- Thank You!

Agile Café Roundtable

What are the challenges (in each of the topic areas) when adopting an AGILE process, and what would be good ways to overcome those challenges?

1. **Selling AGILE to senior management**

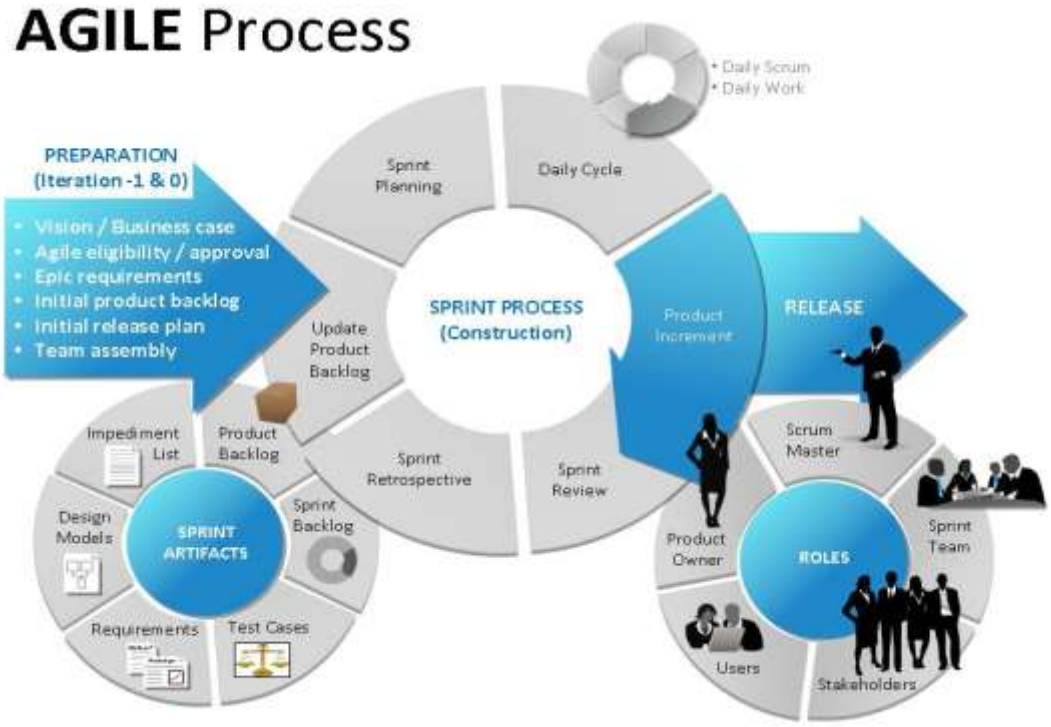
2. **Using AGILE when other internal & external (vendor) teams are still using Waterfall or other methodologies**

3. **Changes to organization, roles/responsibilities, skills**

4. **Metrics / EVM**

5. **Training curriculum**

6. **System design (e.g., screen flow, architecture, database, scalability)**



What is Agile Development?

Agile is an umbrella term used to encompass different methodologies, aimed at iterative development. Agile Development Elements include:

- A cross-functional team in which a development team collaborates with a business sponsor to evolve a solution over the development life cycle
- Production-ready code at the completion of each iteration (1-4 weeks)
- A test-driven approach that involves unit testing in each iteration
- An openness to business partner feedback and reprioritization

Agile Terminology

Product Backlog:	A prioritized list of "User Stories" grouped to support the definition of individual sprints.
Scrum:	Daily stand-up meetings that last no longer than 15 minutes, which focus sprint team members on daily tasks, deliverables, and issues.
Sprint:	A specific iteration occurring within a fixed time period, in which a sprint team is committed to developing a set of Product Backlog stories with the goal of obtaining business sign-off of working software.
Sprint Backlog:	A list of assigned tasks and/or deliverables to be completed within a given sprint by the sprint team; includes sprint burn-down chart illustrating progress over the life of a sprint.
Sprint Team:	Team of people encompassing cross-functional responsibilities, committed to the delivery of only those Product Backlog items assigned to their Sprint.
Stories:	A narrative describing business functions and/or workflows in sufficient enough detail to be considered as an incremental deliverable in a 30 business day sprint.
Velocity:	Amount of Product, or Sprint, Backlog effort a team is capable of delivering in one sprint;

	typically, this is measured after the completion of each sprint.

BUSINESS PROCESS MANAGEMENT

Facilitator(s): *Wemi Daramola, Maritz*

Discussion Highlights

- *Process*
  - *May/may not exist.*
  - *Process can be mapped out*
  - *How you do it vs. what you need should be separate*
  - *Defined by needs and regulations*
- *Process changes*
  - *Need buy-in*
  - *How do you know you need it?*
  - *Ties to strategic vision*

- *Waterfall vs. Agile*
- *Risk Assessment*

Maritz
LOYALTY MARKETING

PROJECT MANAGEMENT:
Process Development, Management & Control

November 19, 2010

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Questions to be Answered

- Why do we need Processes?
- What is our current state?
- How do we develop good Processes?
- What are the next steps?

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WHY DO WE NEED PROCESSES?

Jack of all Trades System

Football Player

Quarter Back

Wide Receiver

Running Back

Place Kicker

Stats				
% / Avg.				

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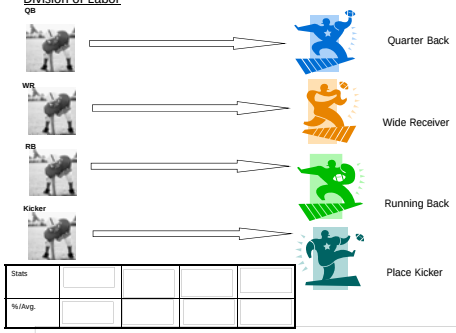
BPO – Business Process Optimization

Division of Labor



Stats				
%/Avg.				

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Five Basic Reasons

- Resource Efficiency & Productivity
- Optimization of New Resource integration
- Repeatability of successes
- Emphasizes Team work
- Allows for Scalability and Flexibility

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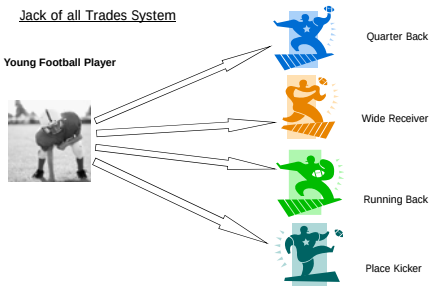
WHAT IS THE CURRENT STATE?

Jack of all Trades System



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Current State Summary

- Resources as “Heroes”
- “Fire-Fighting” culture
- “Siloed” Information & Expertise
- Clients as burdens
- Successes cannot be repeated

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Steps to Developing Optimal Processes

1. Scope: A map of Processes to be Developed.
2. Objective:
   - Why is the Process being developed?
   - What is the expected end result of using the process?
3. Description: The different modules of the Process that need to spelled out.

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1. Scope

Processes common across Organizations:

A. Communications Management
B. Change Management
C. Deliverables Management
D. Issues Management
E. Risk Management
F. Financial Management

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2. Objective

A. Why is the Process being developed?

B. What is expected to be the end result of using the process?

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2A. Why?

- Rigid Business Environment
- Chaotic Business Environment
- Hard working Employees not recognized or not adequately rewarded
- Project execution sloppy
- Successes cannot be or is not being duplicated
- Resources are not working as a team

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2B. End Result

- Create a flexible work environment
- Locate and reward exceptional resources
- Execute projects efficiently
- Duplicate successful projects
- Create camaraderie among team members
- Achieve maximum client satisfaction

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3. Description

Modules most common to Processes:

A. Control
B. Ownership
C. Storage
D. Input and Output
E. Key Contacts

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Final Synopsis

- Tactical changes vs. Culture shift.
- Time factor.
- Infinite possibilities.
- Bureaucracy & Red-Tape.

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QUESTIONS & ANSWERS

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CAREER STRATEGIES

Facilitator(s): *Brian Truhn, Express Scripts*

Discussion Highlights

- *Know the characteristics of a good job*
  - *Good working relationships*
  - *Good leadership*
- *Define yourself*
  - *Strengths/weaknesses*
  - *Opportunities/Threats*
- *Strategy should be no more than 5 years out*
- *Target position defined*
  - *Location, benefits, etc.*
- *Create plan to get there*
- *Regular evaluation and adjustment to the plan*
- *Get a mentor*
- *If you don't have a location in mind how do you know when you're there?*

CHANGE MANAGEMENT

Facilitator(s): *Craig Lalumandier, Charter Communications*

Discussion Highlights

- *Obstacles*
  - *Lack of buy-in*
  - *Flavor of the month*
  - *Fear*
- *Best Practices*
  - *Town hall meetings*
  - *Bring all depts. or stakeholders in*
  - *Create vision*
  - *Create quick wins*
  - *Assessment tools*
- *Change Triggers*
  - *Technology*
  - *Executive support*
  - *Regulations*

COMMUNICATIONS ISSUES

Facilitator(s): *Joe Eimer, Charter Communications*

Discussion Highlights

- *Transparency*
- *Customer advocate*
- *Virtual teams- accountability*
- *Scaling the message- regular and personal*
- *Rumor management- fact based and dated*

CONFLICT MANAGEMENT

Facilitator(s): *Jo Ellen Moore, SIUE*

Discussion Highlights

- *Record lessons learned; use them to head off conflict*
- *Call out conflict as soon as you sense it*
- *Use humor to defuse a situation*
- *Provide formal channel of communication to voice dissatisfactions*
- *Accepted, expected escalation process*
- *Be aware of how you come across*
- *Self awareness*

ESTIMATING/SCHEDULING

Facilitator(s): *Dave Hunter, The Boeing Company*

Discussion Highlights

- *Challenges*
  - *Different dept./teams use different systems. PM sometimes required to perform manual data input to consolidate data from different systems/users*
  - *Estimate may be provided by person not actually doing work*
  - *Some PMs don't have planners/coordinators and are required to plan schedule for all project activities*
  - *Estimates may vary based on skill level*
- *Best Practices*
  - *Use of contingencies*
  - *Use of tools*
  - *Use of technical and functional leads to help provide estimates*
  - *List of assumptions should be submitted with estimates*
  - *Some have dedicated estimating groups requiring top mgmt. approval*
  - *"Top down" mgmt. approach/support lead itself to better tracking*
- *Observations*
  - *Different companies all plan differently*
  - *Some have PMOs, others don't*

ETHICS

Facilitator(s): *Peter Fornof, Hortica*

Discussion Highlights

- *Ethics- ending Bad Projects*
  - *Tell the facts*
  - *Give risks- obligated as PM*
  - *Analysis- show honestly what it really will take*
  - *Consultants- what if you want the work*
  - *Culture- can you speak honestly to management*
  - *Report true costs*
  - *Don't want to admit failure*
  - *EGO*
  - *Does economics trump ethics?*

GLOBAL PM / CULTURE ROUNDTABLE DISCUSSION RECAP

Facilitator(s):
John Lavadure, HP & Mario Badra, Smurfit-Stone

Discussion Highlights

- *Make no assumptions*
- *Respect the culture*

Practical Lessons in Global Project Management – "Learned the hard way"

Mario Badra, PMP
Project Manager
Smurfit-Stone

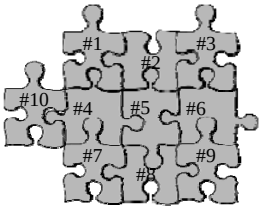
John P. Laverdure, PMP
Engagement Program Manager
Hewlett-Packard

Introduction

- Practical lessons we all learn, but seldom share with one another
- These lessons are based on our experiences, but will apply to all areas of global project management

Overview

- All Lessons Learned are practical!
- All Lessons Learned will apply to you.



Learned the hard way

4

Agenda (The 1st Five)

1. Scope- Know it, learn it, love it, and plan on the Global Nature.
2. Contracts - Yes lawyers do matter, and the law is not same in every Country – (Acquired Rights- EU)
3. Schedule – You wanted it WHEN!
4. Resources – Nine women must have a baby NOW!
5. Relationships and Reporting - Who you tell is important.

Learned the hard way

5

Agenda (The 2nd Five)

6. Predecessors- **A** does come before **B**
7. Reporting Relationships- Even if s/he doesn't work for you- s/he's critical to your project, and may be in a different time zone.
8. Milestone or Schedule – Sometimes you have to make a choice
9. Global Escalation – A fact of life, but not the same in every culture.!
10. Documentation - CYA for you is lesson learned for your peers.

Learned the hard way

6

Agenda (The 3rd Five)

11. Time Zones- **When you talk maters**
12. "Payment before Services" *You may have to follow the local customs-- A Tribute.*
13. Everyone is not as into Equal Rights as in America – Sometimes the culture will not permit a female in a leadership role
14. Vacation – Summer is Europe- great for you, bad for your project.
15. Yes, doesn't mean yes. - Yes in some cultures is acknowledgement only.

Agenda (Other Points to ponder)

- Cultural, Political, and Geoeconomic Challenges
- 6 Rules for Thumb for Doing Business across Cultures

Scope- Know it, learn it, Love it

- What is in your Scope
- What is NOT in your scope
  - The "Third Scope"
  - The Non-Overlapping Scope
  - The Overlapping Scope
- What is "assumed but not documented"
  - This scope has an owner (FIND THEM!)

Contracts - Yes Lawyers do matter

- Contracts and SOW do get read – usually when something is late.
- Raw Dates (unlinked to actions) will kill you!!
  - Date must be linked to customer action
  - Dates must factor in resources and ramp-up
- Become your own lawyer (Contracts specialist)

Schedule – You wanted it WHEN ?!

- Know the Schedule and key Milestones
- Know where your Slack is
- Expect slips in your schedule
- Expect schedule activities to be **crashed**
- **Projects are implemented in "Reality" not in Utopia.**

Resources – Nine women must have a baby NOW!

- Who is as important as How!
  - Who do you have that can do this?
  - How can this be accomplished?
- Surges and Travel time must be factored into your resource plan.
- Know the tasks that can't be crashed by "nine women" – you will be asked to justify this to PM novices in management.

Relationships and Reporting - Who you tell is important.

- What does the customer need to know?
- Who is in the best position to convey the message?
- Credibility of PM is essential – Bad news must come from you! (Sandbagging will get to you!)

Predecessors- A does come before B

- Is a task in <u>your</u> scope dependent on the effort of:
  - The Customer?
  - A Competitor?
  - A Contractor or Contractors (s)- not under contract to you?
- Know that "nearly" everything has a predecessor……. Make sure yours are done.
- If his/her scope must become yours for you to be successful (Document it!)

Reporting Relationships- Even if s/he doesn't work for you- s/he's critical

- Sometimes the people that <u>don't</u> report to you will have the most impact on your project.
- Informal relationships and negotiations are critical to working relationships and managing issues.
- Corporate Politics
  - It is a reality in every project
  - It must be planned for as a task

Milestone or Schedule – Sometimes you have to make a choice

- Schedule management is the "ideal" state of Project Management….. Milestone Management is the "reality".
- Controlling your milestones is essential…. You can't hit them on the wrong road.
- Milestones – a Measure of progress.

Learned the hard way

16

Escalation – A fact of life- get used to it!

- No project will ever be free of escalations.
- Rapid response to an escalation determines project success or failure.
- Escalations are
  - Tasks in your project
  - Must have an owner
  - The escalation owner must be held accountable. (Deliverable)
- Escalations can be a "Moment of Terror" or a "Moment of Clarity" – You Decide.
- Escalations - May have a culture impact……be aware of this.

Learned the hard way

17

Documentation - CYA for you is lessons learned for your peers.

- Documentation is critical for all and painful for some…….. " I don't like to put things in writing; it gives me wiggle room"
- Documentation is a PMI fundamental - where do you think lessons learned and project histories come from?
- Documentation is more then CYA…… it is and audit trail as well…. and good common sense.

Learned the hard way

18

Time Zones- **When you talk maters**

- Asia is 12 hrs ahead of us……..Right now
- Europe in 5 hrs ahead…… and ready for bed.
- When you want someone one to do you a favor– ask them when they are most awake.
- When you need to have an Escalation call –
  - Plan Ahead so that those in the region can support you.
  - Outline your agenda and stick to it.

"Payment before Services" - *A Tribute.*

- Bribes are not acceptable practice in the United States
- Brides, payments to officials special agreements are common place in many regions.
- When it comes to this
  - Know your companies policies
  - Know your customers policies
  - Know what impact this will have on your project.

Everyone is not as into Equal Rights as in America.

- Equal Rights are not the same globally
- Male Dominated Cultures still do business with U.S Companies
- The Smartest PM – That has a Cultural Fit issue will be hindered in their success.
- Awareness is the key

Vacation – Where is my team

- Summer is Europe- great for you, bad for your project.
- Bank Holidays- sometime have nothing at all to do with Banking.
- Thanksgiving is only a US Holiday…….. Canada is still working as is the rest of the world.

Learned the hard way

22

Yes, doesn't mean yes

- Yes in some cultures is acknowledgement only. (Yes I acknowledge that you gave me a deadline)
- Yes to you customer from an India based team isn't yes to you as the PM.
- Silence is not concurrence - Polling on a conference call is essential to ensure buy-in and commitment.

Learned the hard way

23

Cultural, Political, and Geoeconomic Challenges

- Cultural challenges
  - Differences in languages
  - Cultural interests
  - Religions
  - Customs
  - Social attitudes
  - Political philosophies

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Cultural, Political, Geoeconomic Challenges (continued)

- Political challenges
  - Rules regulating or prohibiting transfer of data across their national boundaries
  - Severe restrictions, taxes, or prohibitions against imports of hardware and software
  - Local content laws
  - Reciprocal trade agreements

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Cultural, Political, Geoeconomic Challenges (continued)

- Geoeconomic Challenges
  - The effects of geography on the economic realities of international business activities
    - Distance
    - Real-time communication
    - Lack of good-quality telephone and telecommunications service
    - Lack of job skills
    - Cost of living and labor costs

26

6 Rules for Thumb for Doing Business across Cultures

- Be Prepared
- Slow Down
- Establish Trust
- Understand the Importance of Language
- Respect the Culture
- Understand Components of Culture

Learned the hard way

27

Summary

- The 1st Five……..(Scope, Contracts, Schedule, Resources and Relationships
- The 2nd Five……..(Predecessors, Reporting, Milestones, Escalation and Documentation)
- The 3rd Five ……(Time Zones, Payment before Services, Equal Rights, Vacations and Yes)

HR MANAGEMENT ISSUES

Facilitator(s): *Roby Walker, Joyce Meyer Ministries*

Discussion Highlights

- *Must understand generation differences*
- *Tend to use virtual contractors instead of on site employees*
- *Common sense isn't common anymore*

INFLUENCE WITHOUT AUTHORITY

Facilitator(s): *Maryellen Kliethermes, Ameren and Barb Strang, Wells Fargo Advisors*

Discussion Highlights

- *Skills to influence different levels are different*
- *Follow example of those who truly influence you*
- *Listening is critical*
- *Build personal relationships*
- *Be humble- no job too small*
- *To influence those up the chain- No "WIIFM"*
- *Publish agenda communication, follow up*
- *Build trust by credibility*
- *Focus of a common goal in conflict; have same agenda*
- *Appreciation*
- *Define roles clearly*
- *Influence doesn't equal manipulation*
- *Be conscience of actions on and off the clock*
- *Be aware of body language and how you say something*
- *Speak with facts. Facts are friendly*
- *Food helps*
- *Be respectful, be fair, be responsible, and be honest*

LESSONS LEARNED FROM BAD PROJECTS

Facilitator(s): *James Page, Jr., U.S. Postal Service*

Discussion Highlights

- *Outcomes*
  - *No verbal agreements*
  - *Don't start project until contract is executed*
  - *On site visits/site survey/evaluations*
- *Fix*
  - *Review contraction financials before selecting contraction*
  - *Communication*
  - *Executive sponsor*
  - *Scale contingency funding to project risk (stratify contingency)*
- *Divide*
  - *Risk avoidance*
  - *Solid requirements/solid contracts*
- *Delay, Mothball*
  - *Leave old system on before turning new system on*
  - *Proper cash flow mgmt.*
  - *Labor issues*
- *Discontinue*
  - *Manage payroll and wages- overtime*

MANAGING DIVERSE TEAMS

Facilitator(s): *Leslie Walker, Wells Fargo Advisors*

Discussion Highlights

- *Recognize the difference*
- *Manage the difference with your comfort to discuss it*
- *Learn about the culture*
- *Don't be afraid to take a risk*
- *If mistakes occur, apologize*
- *Educate the team about diversity*
    - *Why it's important to company*
    - *Why it's important to team*
    - *What benefits it brings*
- *Open communication- continuous growth*

METRICS AND PROJECT TRACKING

Facilitator(s): *Ozzie Lomax, Ameren Services*

Discussion Highlights

- *Types of Metrics*
  - *Availability*
  - *Severity*
  - *# of tasks completed*
  - *CPI/SPI*
  - *Track deliverables*
  - *Milestones*
  - *Scope change*
  - *Labor hours*
  - *Productivity (takes several measures*
  - *Quality*
  - *Need for historic trends*
  - *Regulations*
- *Surveys (electronic, follow-thru). Send at 33%, 66% point. Show use of data*
- *Task complexity varies*
- *Leading indicators- impact maps potential conflicts*
- *Selection depends on project sponsor*
- *Key Areas:*
  - *Scope*
  - *Cost*
  - *Schedule*
  - *Quality (error rate)*
  - *Complaints*
  - *People/widget*
  - *Support calls*
  - *Attrition*
  - *Sick days*
- *Training hours*
- *Issues log (# open, # closed)*
- *Dashboard arrows and colors*
- *Data points and trends*

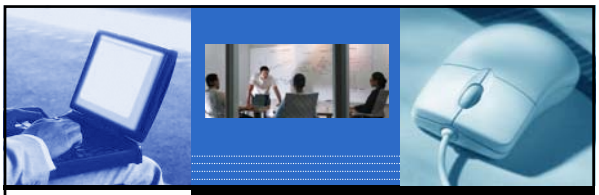
PM vs. Business Analyst

Facilitator(s): *Cheryl Harbison, Scottrade*

Discussion Highlights

- The PM and BA each have specific and unique skill sets.
- Best practice in organizations where the PM sometimes fills the role of the BA is to conduct a review of the roles and responsibilities during project kick-off.
- The project manager and business analyst roles on "small" projects could be effectively filled by the same individual - however, on larger more complex projects individuals with specific skill sets assigned to each role is critical to project success.
- The role of the business analyst is still sometimes filled by the subject matter experts in some organizations. In others, the BA is expected to become an expert in the specific lines of business / domains.
- Many titles used for those filing the role of a business analyst (Business Analyst, Systems Analyst, Programmer Analyst, Data Analyst)
- Is "data mapping" an analyst function or should it be completed by a developer / DBA? It seems that data mapping can really be divided into two areas:
    - Data discovery / research: "taking inventory" of the organizational data and the "business definition" of the data, understanding what data is needed for a project, the sources of the data, business logic supported by the data and business rules surrounding the data. (Analyst Function)
    - Data mapping: definition of table joins and data lookups, which are important in extracting the correct data to be later consumed by the target. Business rules and business logic analysis are used to determine data transformation requirements and data element mapping. (Developer / DBA Function)
- Although the project manager is "accountable" for managing scope – the entire team (including the analyst) are responsible for ensuring their specific activities and deliverables align with the approved scope.

Also see documents used to focus discussion.



BA vs PM Roundtable

Project Leadership

- Strategic
- Champion project
- Obtain budget
- Final escalation

- Strategic
- Product / Service Expert
- Competitive Analysis
- Feasibility Studies
- Knows WHAT is needed

Define Solution

Executive Sponsor

SME

Project Manager

Business Analyst

Deliver Solution

- Tactical
- Schedule / Resource Mgt
- Control all aspects of Scope
- Ensures on time on budget delivery
- Project communication

- Tactical
- Identify business stakeholders
- Elicit requirements
- Analyze and document requirements
- Ensure solution validation
- Bridges What and How

Focus

Product or Service Manager (Subject Matter Expert):

- Strategize (New ideas and opportunities)
  - **Driving the requirements**
  - **Resolving business issues**
- Optimize (Transition and improve)
  - **Validating products**
- Assess (Measure)

Project Management:

- Ensures that the product is delivered to the customer on time and within budget. (Project Success)
- Project WBS / Schedule
- IT Resources
- Scope Management (Project)
- Big Picture
- Removes issues/roadblocks
- Project Risk Management
- Management Skills

Business Analysis:

- Ensures that the product is built according to the requirements and is built correctly. (Product Success)
- Analysis Activities / Plan
- Business Resources
- Requirements Management (Product)
- Detail-oriented
- Identifies issues
- Identify Product Risks
- Investigative skills

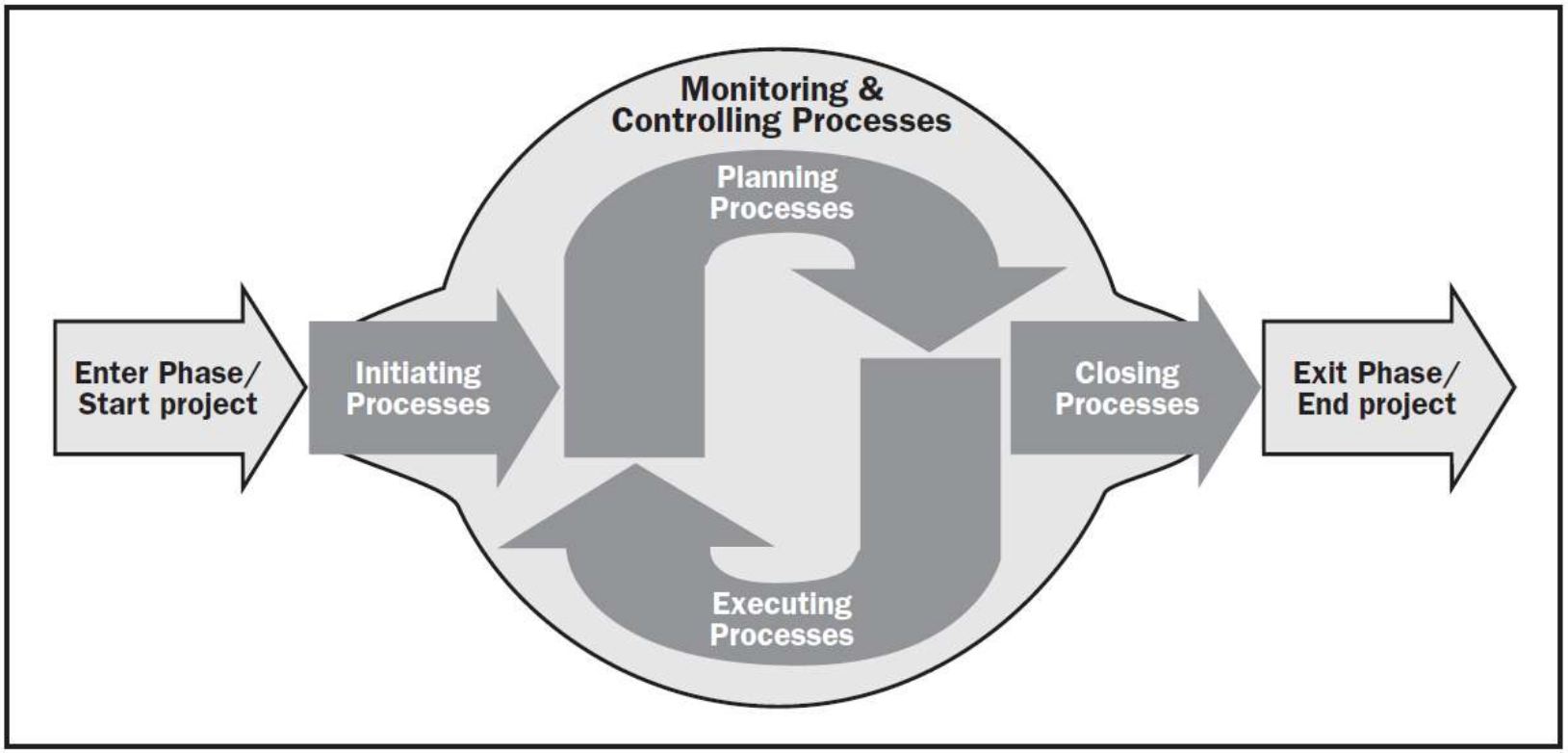
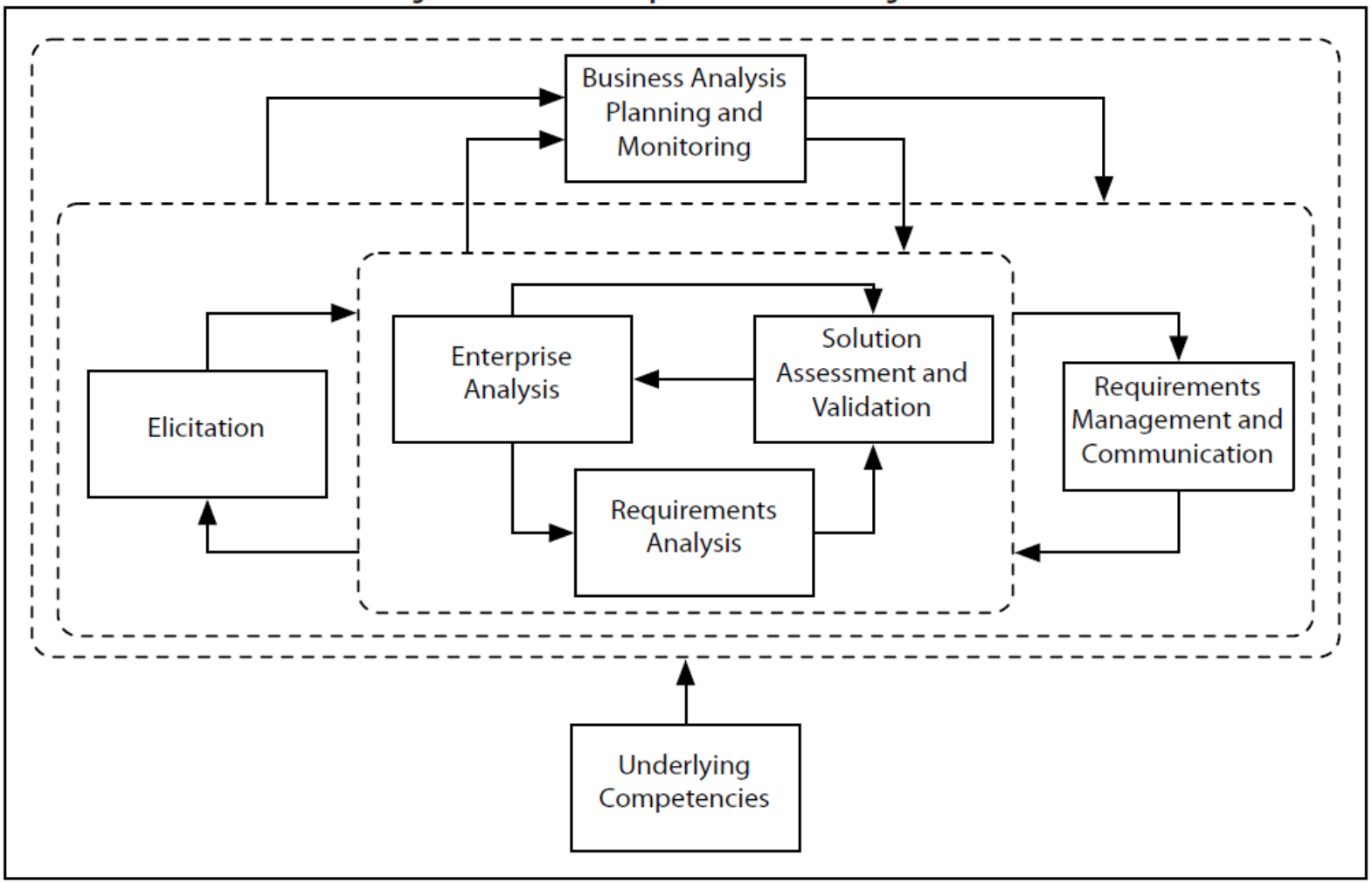


Figure 3-1. Project Management Process Groups

Underlying Knowledge Areas
Project Integration Management
Project Scope Management
Project Time Management
Project Cost Management
Project Quality Management
Project Human Resource Management
Project Risk Management
Project Procurement Management

Source: PMI Project Management Body of Knowledge

Figure 1–1: Relationships Between Knowledge Areas



Underlying Competencies
Analytical Thinking and Problem Solving
Behavioral Characteristics (ethics, trustworthy
Business Knowledge
Communications Skills
Interaction Skills
Software Applications (tools used to facilitate the collaboration

Source: IIBA Business Analyst Body of Knowledge

PMO Issues

Facilitator(s): *Sonia Francis, Wash U. School of Medicine*

Discussion Highlights

- *Business Driven PMO*
  - *Value to business*
  - *Knowing business strategy*
  - *Project and business side involved at all steps*
- *Managing PMs under PMO vs. Decentralized*
  - *Communication is key*
  - *Education and training for budding PMs*
- *Executive Buy-in*
  - *Everyone is not a project manager*
  - *Need understanding of training*
  - *Certification, role, etc.*
  - *Executives knowing what to ask for*
- *Resource Mgmt.*
  - *Matrix to show impact*

PROGRAM MANAGEMENT

Facilitator(s): *Doug Ascoli, Ameren Services*

Discussion Highlights

- *What is a program?*
  - *Common objective*
  - *High level of effort*
  - *Tighter connection between projects but distinct enough to have projects*
  - *Large and complex effort*
  - *Multiple business stakeholders*
  - *Aligns with a more corp. initiative driven from top down*
  - *Programs have different communications needs*
  - *All projects under a program must be successful*
  - *Need a program charter*
- *What is a program manager?*
  - *Skill sets*
  - *Fills gaps between projects*
  - *Keeps eyes on the big picture*

TEAM BUILDING

Facilitator(s): *Vergia Burrell, Motorola*

Discussion Highlights

- *A team- a small group with complementary skills applied to achieve a common goal which everyone is held accountable*
- *Phases- Forming, Storming, Norming, and Performing*
- *Share leadership and do real work*
- *Provide unity of direction*
- *Provide goals, roles, and responsibilities*
- *Get to know your team members personally*
- *Management by walking around*
- *Introductory team building- recognition and reward*

What is a team?

Common Definition:

A team is a group of people with each one having a narrow set of skills, knowledge, and interests that are applied to achieve a common purpose. (Karen Bemoski, What makes American teams tick?, Quality Progress)

Best Definition:

A team is a small group of individuals with complementary skills that are applied to achieve a common goal by which everyone is held accountable.
(The Wisdom of Teams by Jon Katzenbach and Douglas Smith)

Leading High Performance Projects – Ralph L. Kliem, PMP

What is a team?

- Best Definition operative words – complementary, common, committed, and accountable.

- Complementary – means that a team consists of people with different skills.
- Common – means that people share a destination and path when applying their complementary skills.
- Committed – means that they have a personal stake in activities and outcome.
- Accountable – means that their participation contributes not only to their own success but also to that of others and the entire project.

Characteristics of Good Project Teams Best Practices

- To encourage a sense of community among all members, direct and indirect. (shared culture, trust, teamwork and good communication)
- They encourage collaboration, willingly and constantly. (consensus, integrity, ownership, and respect)
- They encourage a strong sense of commitment by all team members. (compelling goal)
- They focus on results, defined as the achievement goals and objectives. (both goals of the team and individuals require alignment)
- They openly share ideas, information, and feelings.
- They recognize that everyone on a team has leadership potential, not just the leader. (team leader can enable that to happen by allowing team members to “rise to the occasion” if a situation warrants

Building The Project Team
Best Practices

- Building a team is not easy.
- Project Managers must prepare themselves to deal with conflict.
  - Recognize the source of conflict.
    - Unclear goals and objectives
    - Ineffective resource distribution
    - Different approaches and values
    - Unreasonable expectations
    - Diversity in ethnicity and thinking

Building The Project Team
Best Practices

- Teams Progress through Phases
  - Forming, Storming, Norming, and Performing

OR

  - Pre-Team (Forming), New (when a team clearly identifies its purpose, defines team members' roles, and encourages a sense of working together), and Mature (ability to adapt to changing circumstances, take on additional responsibilities)

Building The Project Team
Best Practices

- Build Commitment Through Involvement
- Inspire, Not Perspire, People
- Provide Unity of Direction
- Foster Collaboration Through Cooperation
- Liberate, Not Subjugate (remove constraints, encourage sharing of ideas, invite different people with diverse insights to team meetings, regularly challenge the modus operandi, build an atmosphere of trust, communicate honestly, share power and delegate, emphasize teaming on tasks, reward and recognize creativity)

Indicators of Poor Teaming

- It is riddled with negative conflict. (own agendas)
- Members are full of cynicism and distrust.
- A team pursues unclear goals and objectives. (focus on individual goals rather than the overall goals and objectives)
- It lacks energy.
- Members are misaligned, both internally and externally.
- A team lacks leadership, either by the leader or other team members. (the team floats according to the circumstances)

Reasons for Poor Project Teams

- Why do such conditions exist on projects?
  - Many project managers do not provide team members with well-defined goals, roles, and responsibilities.
  - An overall sense of direction is missing.
  - Many project managers fail to manage conflict effectively.
  - They often fail to develop a well-rounded balance of skills and talents on a team.
  - Misallocate resources.
  - Failure to seek support from the key stakeholders.

Team Building Activities

Potluck

A great way to have fun with your team is by sharing each others delicacies. Everyone enjoys a wholesome meal, a rarity in a workplace. So potluck is a great way to share your favorite dish with your teammates. Here the group makes a list of items, and each member selects one item from the list. If a few team members do not have the convenience of cooking, then there is always the option of buying cold drinks or an ice-cream treat after potluck lunch.

Team Outing

A team picnic or going for bowling, go kart, baseball games can be a huge stress buster. It need not necessarily be an expensive outing, it is the quality time spent with the team members that creates the bonding.

Charity

There is no better team building activity, than getting together for a good cause. Choose from a list of charity events and one cause that most of the team members believes in. Collect donations from your family and friends, or organize events to collect funds to donate the charity organization. If you do not want to give monetary help, then you can go together to an old age home on a weekend and help the people there with their daily chores.

One must always remember, just organizing a team activity does not guarantee success. And organizing one once a year also does not suffice and it needs to be held continuously. Organizing fun team building activities for the workplace at least weekly or monthly, to keep the employees motivated and focused, is the key. For effective team building in the workplace, it is also important to identify the issues and plan an activity to tackle this issue. If there are no issues, then plan activities to maintain and improve performance, but always avoid making team building exercises competitive.

www.Buzzle.com

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- Ralph L. Kliem, PM, *Leading High Performance Projects, pp. 155-165, 2004*
- Jon R. Katzenbach and Douglas Smith, *The Discipline of Teams*, Harvard Business Review,1993
- Daniel Coleman, *What Makes a Leader?,* Harvard Business Review, 1998
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VIRTUAL PROJECT MANAGEMENT

Facilitator(s): *Mary Ann Gates, Unisys*

Discussion Highlights

- *Effectively communicating sentiments via email/conference call*
- *Global communications*
- *Holding team members accountable*
- *Balancing office work with working from home*