**Case Studies**

1. You’ve been asked by your manager to analyze requirements for a new project: redesigning the company website. You start off by identifying the key stakeholders and quickly realize that the two key people you need in the first requirements meeting are David from Marketing and Jane from Sales. They both play key roles in the business but also define the strategic direction of the website. But unfortunately, they don’t get along well. Or so they tell you. People tell you that it’s pretty much impossible to get them together in a room because they avoid each other. So, as you start preparing for your first meeting, you quickly realize you’re already facing your first challenge as the PM for this new project.

In your mind, you start thinking: should I meet with one of them first? And then the other? Maybe it’s best to have separate meetings to ensure people actually attend the meeting and you can gather the information you need. You could also invite their manager to the meeting to ensure they both assist, but that would likely translate in less input, people feeling on the spot with a senior leader in the room and might actually end up in a rough start. So, you start wondering what you can do and how to best approach this scenario.

Choose one of the following options:

* 1. You send an email and request input from all stakeholders through an online survey. You no longer need the meeting, and you know that by email, both Jane and David will reply. And that’s ultimately what you were after anyway.
  2. You plan the meeting with all stakeholders, including Jane and David. You don’t make any assumptions and give yourself the opportunity to get to know them in person before judging them or their relationship based on what people say. You also talk to each of them informally over coffee and discuss with them your role, what you will be working on, and how their input in the first meeting will be greatly appreciated and valued.
  3. You plan the meeting and hope for the best. Surely things will work out in the end.
  4. You invite all key stakeholders plus the executive team as you think they should be involved from the get-go on the project; plus, having them on the invite will ensure David and Jane attend. Involving everyone in management in your project will allow you to ensure your project kickstarts on the right track with everyone’s support.

1. You’re mid-way through one of your projects where you’re migrating people to a new system. You’re now doing weekly migrations and have reached a difficult group. They’re not entirely happy with the change, don’t really understand the need for it, and have expressed lack of confidence in the team’s capacity to deliver on time without any issues.
   1. You plan a Q&A session with the group prior to their migration and allow them to voice their concerns and questions. You attend this with your team so you are supported and can answer all their questions or have someone on the team who can. If a question comes up that you can’t answer, you take it offline and respond the next day. In addition to the above, you share with the group the scope of the project, key project stats, and your success rate. Plus, you showcase success by sharing with them which groups have already been migrated and even giving them two people they can contact.
   2. You press on as planned. You have a really busy agenda and can’t really afford to hand-hold people or groups of people. Ultimately, you are being measured by delivering on time and on budget.
   3. You talk to the migrated group post migration. A week after, as you know by then, they should be “happier” with the change and won’t bombard you with too many questions. Best to allow people the opportunity of experiencing the changes before talking to them.
   4. You delegate this issue to someone else from your team. They have good people skills and even though they’re not across the project in detail, you know they’re good with people and will be able to make the best of any situation.
2. The PMO has asked you to prepare a budget for one of your projects. But you’re still in the discovery phase and don’t actually have all the information you need to prepare an accurate budget. Yet you know management is expecting you to come up with something as they are going through their planning cycle for the next year and they need to check the project pipeline and requirements around investment, expenses, and so on. Given the context and that you want to provide accurate numbers, you start to feel a bit uncomfortable about the whole thing.
   1. You prepare a draft budget and make some assumptions, which you list out as part of your budget proposal. You also add a 10% contingency to cover some of the variation that might occur. Plus, you send a note to the PMO when you send the budget, explaining you’re still working through some of the numbers and won’t have a final version until about three more weeks. But you let them know you’ve prepared the budget to the best of your ability at this stage and will inform them of any changes.
   2. You decide it’s a good time to go on leave. That way, you can avoid dealing with the situation and let your manager decide what number he wants to provide for the budget.
   3. You complain to your manager about this unreasonable request and express your discomfort with the process, the PMO, and so on.
   4. You generate a draft budget to the best of your ability, and you add an extra $100k to cover unforeseen expenses and charges. You send the budget through and wait to hear back from management about adjustments or changes they might request.
3. You’ve been meeting with your project team on a weekly basis for a couple of months and it has proven a successful strategy. Which is actually something you learnt in the project management methodology used in the company you work for. Suddenly, you start noticing a few people missing your team meetings. Someone from the team informally tells you that he feels meeting weekly is no longer required since the project has reached a level of maturity in which fortnightly meetings would work better. He also advises you that everyone on the team is pressed for time and under the pump with other projects and end-of-year processes requested by management.
   1. You ignore the situation and continue the weekly meetings that proved successful in the past.
   2. You raise this issue in one of your team meetings and let your team members know that you expect them to be there on time every week. You also demand they meet their responsibilities to the project, to you as a PM, and to the business.
   3. You train your team in the project management methodology, which involves everyone meeting on a weekly basis. After the training, you talk to them about the importance of meetings and how this methodology has helped you in the past to deliver projects successfully. You also highlight that they are now certified in this project management methodology and that they can add it to their CV.
   4. You follow your gut feeling and reschedule the meeting to every two weeks. You share with the team your decision and the rationale behind it (being at a different stage, the project progressing smoothly, everyone doing a great job, and you understanding time constraints at the moment), but you also let them know that they need to remain flexible and that should the need arise, you will reschedule meetings on a weekly basis.
4. You’re leading a relocation project in which you are moving two groups of people to two new offices. One of the groups requests to have their new chairs green and the other group would like them to be blue. Bobby is one of the key people working with you on the team and has the responsibility to make sure the chairs are on time for the move and match the requested color. On the day of the move, people arrive and notice the chair color does not match their requested color. Some of them are really unhappy and others start voicing—through different channels—how much they hate the color that was mistakenly provided. People start asking questions and pretty soon, the environment becomes tense due to this mistake. Some people want to know who is to blame for this awful error. Cameron, the CEO hears about this and calls you to your office. One of his key peers is in the impacted group and is pretty upset about the mistake.
   1. You focus on the big picture and explain to everyone that they were successfully moved to a new office and that in the grand scheme of things, the chair color is nothing. That they should move on and get started with their work right away while you get things sorted. You minimize the mistake and shift attention to other matters.
   2. You point at Bobby and make everyone aware that it was his mistake but let them know that he is a responsible guy who has taken accountability and is already working to resolve the issue.
   3. You own up to your team’s mistake and take ownership and accountability of what happened. You draft a great email to the people impacted, letting them know what happened, what you’re doing about it, when the issue will be resolved, and apologize for the inconvenience. You back Bobby all the way and let everyone know that you have his back and that you will work as a team to resolve the issue in a matter of hours. After turning out the fires, you talk to Bobby and the team and perform a lessons learned session so you can all learn from this mistake and avoid it in the future.
   4. You ask Bobby to deal with the group and you ask him to take your place at the meeting with the CEO. You tell him that it’s a development opportunity for him to deal with the situation and you focus on your budget, the project timeline, and your deliverables.