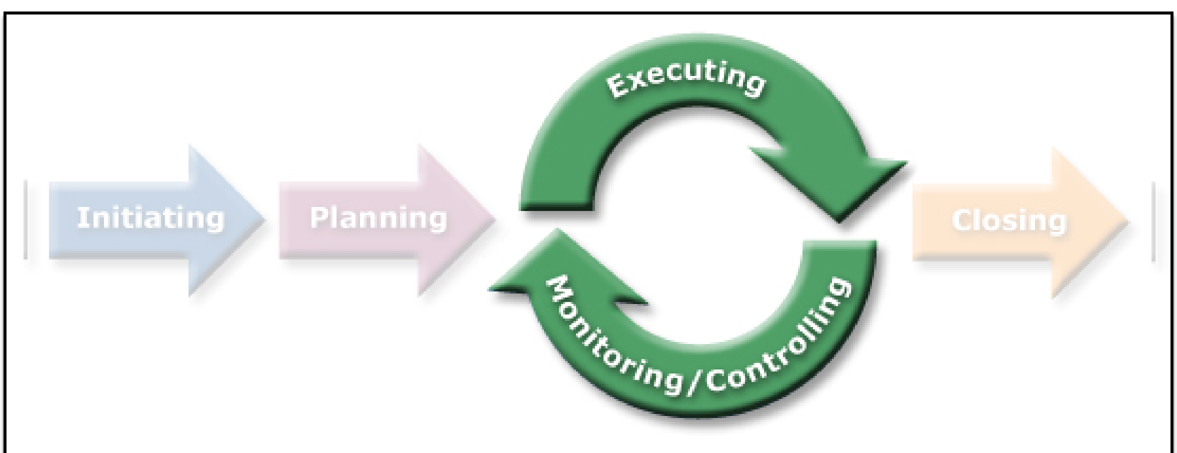
Module Seven: Project Implementation and Execution

Module Seven: Project Implementation and Execution

The athletes village under construction for the 2010 Olympic Games in Vancouver, BC.

7.01 Learning Outcomes

Module Seven: Project Implementation and Execution



The Executing stage is the part of the project where the project team completes the work set out in the project plan.

At this stage, the efforts of the project manager will be primarily focused on coordinating the people and resources that are needed to carry out the project. The project manager will support the team as they continue to gain new skills that benefit them as individuals and help the team as a whole. The manager will convey the most recent and most relevant project information to stakeholders in whatever format best suits their needs. And he or she will continue to collect important project details that will be used to create the lessons learned that will help current and future project teams.

It is important to note here that as the project work is executed, Monitoring and Controlling work will be run at the same time to ensure that the project continues as planned.

7.03 Executing the Project Work

Executing the Project Work

Executing

The executing stage is the point where the work of a project is carried out. It's where teams create the shippable or marketable product, service, or result that will be passed on to the customer or used as the starting point for the next project phase. Executing is often the longest stage of a project. Typically, it is the stage where most of the project's resources are used. In the executing stage, as project manager you act as the facilitator or enabler for the team. Your job is to help the team to complete its work without distraction. You'll run interference for the team by addressing stakeholder expectations and dealing with disruptions. During executing, as project manager you make sure project resources (people, machinery, materials) are available when needed. You also look to keep team members from different functional areas working together productively. The project manager also seeks to enhance both team and individual skills.

One helpful tool during the executing stage is the project journal. The project manager and project team can employ this journal to keep a record of their actions as they execute work and to track lessons learned throughout the project. The project journal should document the reasoning behind any decisions made, compare any intended results to actual results, and record any unintended results. Recording events and impressions as they happen while they are still fresh in people's minds will prove helpful at the retrospective meeting you'll hold at the end of the project. Don't forget during the execution stage to make sure that the team celebrates successes and milestones as they occur. These short celebrations help recognize achievement, foster team unity, and energize the team as they continue their work.

During the Executing stage of the project, practitioners will begin to see the project's deliverables take shape as they complete the actual project work. The project team will be mentored and directed by a project manager as they complete the activities that were prepared for in the Planning stage. Team performance will be tracked as work is executed, to be used in the Monitoring and Controlling stage as a guide to help supervise the team's work.

Executing essentially encompasses all of the actions needed to complete the work defined in the project's scope statement. Typical Executing tasks include:

- Creating project deliverables and performing activities to meet project requirements
- Managing and coordinating project resources
- Staffing and managing teams and training team members
- Managing project communication channels and distributing relevant project information
- Generating data related to project cost, schedule, quality, and progress for comparison to baselines
- Making changes and adjustments to project plans and the project environment
- Managing and responding to risks
- Managing suppliers and sellers
- Collecting lessons learned and improving processes

Executing is often the longest portion of a project. On an S-curve, the Executing stage is the steepest part of the curve where project resources—and therefore the project budget—are used at the fastest rate.

The Importance of Communication

In an ideal world, the preparation done in the Planning stage would free participants from having to spend a lot of time replanning during Executing—practitioners would then just be ensuring that project activities are being completed as planned.

But in the real world, the project may not work as hoped for, even with the best-laid and most comprehensive plans. Activities may move faster or slower than expected so project work will need to be adjusted. Variances may affect the project plan and require analysis and appropriate responses.

As issues like these occur, it is very important to acknowledge them and to convey reactions and responses to appropriate stakeholders. By distributing important information quickly and succinctly to the right stakeholders, practitioners will ensure that key participants are informed of issues and will not be surprised by adjustments and results.

Project Leadership

It is also during project execution that management skills are the most visible. When a team is executing project work, conflicts and interpersonal issues may arise that require the use of "people skills" to manage and resolve. Participants may also need to rely on these skills to manage team dynamics and inter-organizational relationships. And project leaders will need to ensure that team members gain experience and new skills that will help them progress along their career paths. It is here, in Executing, that the team will have to be *lead* in completing their work and achieving results instead of simply having their output *managed*.

Getting Work Done

The Executing stage of the project can be challenging but can also be very rewarding. Here, practitioners will be implementing the plans that they prepared, putting their hard work into action. They'll complete the objectives set forth in the project charter and create the unique results that their project was designed to accomplish. And they'll see team members grow and flourish as they learn new skills and put their experience to work.

7.03.1 Exercise: Tasks in the Executing Stage

This assignment does not contain any printable content.

7.04 Developing an Effective Team

Developing an Effective Team

One of a project manager's greatest responsibilities is to ensure that the project team works effectively and efficiently in executing its work. Ensuring that the team has the knowledge and skills it needs to complete work and that team members work well together is extremely important in helping the project meet its objectives.

Effective teams communicate freely, exchange input and feedback, and discuss ideas openly. Team members who work well together are more enthusiastic and committed, and they resolve conflicts more quickly without intervention. They understand their roles and responsibilities and they trust their coworkers to do what is in the best interest of the project and the team. They collaborate to solve problems and make decisions, and they understand the reporting relationships and level of authority of the people involved, helping them to complete activities within the structure of the project.

If the team struggles in their interactions and relationships, project leaders may need to provide training that helps team members work together more efficiently. The tools and techniques in the chart below should be considered to help guide the team in its efforts.

Tools to Develop an Effective Team	
Training	It is important to take advantage of planned and unplanned training opportunities. Planned training opportunities can include classroom or computer-based training courses, peer-to-peer instruction, mentoring by a superior, and on-the-job training by a team member. Unplanned training opportunities—overheard conversations about issues or problems, answers to individual questions about a specific part of the project, etc.—can also be used when they present themselves, such as when team members observe others and talk about the work at hand with project participants.
Team-building Activities	Project leaders should use team-building activities to encourage individuals to take advantage of the help and support of their peers to get their work done. Team building encourages team members to understand that problems with the project are *team* problems and often can only be solved when the team works together. Team-building activities may be day-long, off-site activities but can also be done as short activities within existing office space.

Colocation	While technology is expanding the work that teams can do without being in the same location, it is often useful to bring team members together to work in a collaborative work space. This can be done on a short-term basis—even a team meeting might be considered a colocation technique—or as part of a longer plan—leaders might consider bringing together a group of off-site workers to work in the same office to help speed up processes under a tight project deadline.
Ground Rules	When team members don't know each other very well or come from various cultures that have different approaches to completing work, the project manager may want to set some ground rules to articulate these differences and explain how the team can best deal with them.
Recognition and Rewards	When looking to develop skills that help the *team* progress, it is imperative to avoid recognition for individual achievements as well as "win-lose" awards such as employee of the month (i.e., if one team member "wins" a monthly award, all other members "lose" the award). This type of recognition increases competition among team members, not collaboration. The criteria for awards should be published openly and particular attention should be paid to the type of reward or recognition that will motivate the team—while one team motivated by money might appreciate a pay-raise or bonus, other teams might value an office party or extra vacation days more.

Project managers must also become comfortable identifying signs that their teams are breaking down. Chronic complaining about progress or workload, apathy, poor communication, and missed deadlines are often red flags that a team is faltering. When intervening in such a situation, project leaders should consider calling a meeting to let team members air their concerns. This will help the team gather information and decide on a course of action, which might include additional training that will help staff complete work with less frustration.

7.05 Resolving Conflicts

Resolving Conflicts

Project leaders should strive to provide team members with work that challenges them and offers opportunities for them to excel. But team members often come into conflict as they work to complete these challenges, and unresolved conflicts can quickly disrupt project work and cause irreparable damage to relationships.

When managing conflict among team members, the project leader's first step is to encourage the parties involved to resolve their disputes on their own—leaders should only step in to settle the situation if the conflict is beyond the team's ability to resolve.

Leaders should be aware, however, that some conflict-resolution techniques will help to resolve the dispute, but may cause resentment or create new problems that may affect teamwork. It is important to make sure that all options are explored and the facts are thoroughly examined before a decision is implemented; decisions may have repercussions that will affect future work and relationships as well as current ones. Any decisions regarding the dispute should be explained to the concerned individuals in a professional and objective manner.

Any issues that cannot be resolved or that may significantly impact the project should be brought to the attention of the project sponsor or a senior executive. If a resolution can't be found, staff might need to be reassigned or replaced; if such actions are necessary, these decisions must be recorded and their impact on the project must be assessed. Changes to project staffing may affect several project parameters if the skills of those staff members are lost.

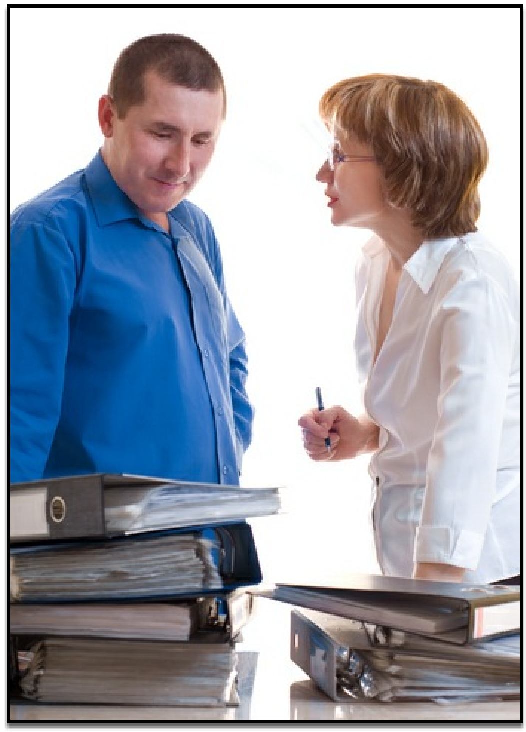
The development of an efficient and well-adapted team requires a leader with good interpersonal and "soft" skills to support community building. Such a leader would need to be able to facilitate group interaction, empathize with team members, influence team member and stakeholder opinions, and find and apply creative solutions to team challenges. By developing and applying these skills, project leaders should be able to foster an environment that ensures project objectives are met and that increases the team's satisfaction and enjoyment working on the project.

7.05.1 Exercise: Conflict Resolution Fill-in-the-Blank

This assignment does not contain any printable content.

7.06 Communicating with Project Participants

Communicating with Project Participants



Good communication doesn't just happen—it has to be organized and coordinated. To be effective, project practitioners will have to determine *who* should be communicated with, *what* should be communicated, *when* it should be communicated, and *how* it should be communicated. They will also have to decide *how often* it should be communicated and updated.

To help decide how these communication needs will be met, project participants will have to evaluate the context and environment that the communication will take place in:

- What is known about the relationships among stakeholders? Are interactions friendly or are they more formal and business-like?
- What communication style (informal discussions, formal reports, etc.) does the organization use most often?
- What technology (email, Web pages, videoconferencing, etc.) is available for communication? Are there any resources available for adding new technology and will this new technology require training to be used effectively?

Practitioners will also have to consider the expectations that stakeholders have about the information that will be provided:

- What format do stakeholders prefer—do they prefer to see detailed reports or quick summaries? Are they expecting face-to-face interactions?
- How detailed does the information need to be?
- How often will the information be available—do they expect up-to-the-minute data or periodic (daily, weekly, etc.) reports?
- Who will ensure that the information is correct?
- How will stakeholders provide feedback and what will happen to the feedback they provide?

Remember: to communicate effectively, the *right* information must be provided to the *right* people at the *right* time in the *right* format.

Managing Communications

To make sure that stakeholder communication is properly managed, practitioners should review the stakeholder list created in the Initiating stage to ensure that stakeholders are not forgotten and that particular attention is paid to those that need special care (especially high-power or high-interest stakeholders).

Participants will also need to consider whether they will need to dedicate resources to external communication. Communication with other organizations or with the public can be costly and time-consuming and is likely to require formats and methods that are different from the ones used for internal communications. Rules and regulations on releasing information to external sources will need to be strictly enforced—the performing organization or the other parties involved on the project may have specific policies about what information can be released and who is authorized to release this type of information.

Providing Status Reports

Once the communication needs for the project have been analyzed, practitioners should turn their attention to the information they'll provide and the best way to provide it.

An easy way to provide project progress to stakeholders is with a simple status report. The status report should be concise and easy-to-understand but should still cover all aspects of the project that are important to stakeholders:

- What deliverables are complete or incomplete
- Any quality or technical issues that have occurred
- What changes have occurred and how the team has dealt with them

- What risks are currently affecting the project and which risks could affect future work
- Whether the team is meeting the project schedule
- What costs have been authorized and incurred
- How quickly resources are being used

Tracking this relevant data and presenting it to stakeholders in a succinct format will provide a quick reference for further discussions should the need arise.

Customizing the Information Provided

Communicating and distributing information can quickly become overwhelming if information has to be customized for a wide array of stakeholders and interested parties. Not all stakeholders will want—or need—to see all project information so it is important to tailor the information to the parties involved. For example, practitioners may want to consider appointing department managers as communication contacts so information can be tailored to focus on important facets for a particular team or department.

The assignments that follow discuss Kanban boards and push communication, pull communication, and interactive communication as ways of customizing information presentation.

Technology as an Advantage

The technology used to distribute information can be either simple or complex depending on how frequently senders need to update and provide information to receivers. Project blogs and wikis allow immediate access and can be very helpful to keep internal stakeholders up-to-date on project problems and projects, especially when a team's ability to meet in person is limited. Project participants might also consider holding frequent meetings to communicate relevant information. For example, Agile teams hold daily 15-minute meetings to provide quick progress reports; more in-depth project reviews and retrospectives are also held periodically to present results and evaluate data with stakeholders.

Web-based Resources

ProjectManagement.com's "Top 10 Tips for Project Status Reports" provides important advice to help in drafting an effective status report and convey the information needed to update project stakeholders.

7.06.1 Updating Senior Leadership

Updating Senior Leadership

As part of regular communication with stakeholders, project managers will want to assure senior executives and project leaders that their projects remain in continuous alignment with corporate objectives and business strategies. During project initiation, the correlation between business and project objectives will have been explained but periodic updates will ensure that this important relationship is not neglected or overlooked.

It may be helpful to consider the following suggestions when preparing strategic alignment updates for senior stakeholders:

Be Specific

Provide precisely what stakeholders need to know; don't get mired in nonessential details.

Be Precise

Present the information as clearly and succinctly as possible, in a format that will allow participants to quickly extract essential alignment data.

Be Accurate

Ask team members to keep strategic objectives in mind as they submit status reports, then pass this up-to-date information along as necessary during alignment discussions.

Be Prepared

Keep abreast of any changes to organizational objectives, and consider how these changes will affect project activities and goals.

Be Proactive

If misalignment does occur, explain any contingency plans and corrective actions that will be implemented to compensate for inaccuracies.

Be Collaborative

Enlist the help of sponsors, team members, and the project management office personnel in gathering data, explaining plans, and communicating adjustments.

Be Creative

Consider using a dashboard, balanced scorecard, or other graphic element to display alignment with objectives.

Alignment updates should be interactive events, with both sides asking questions and providing information to help each other understand and ensure mutual benefit. As such, any new decisions, adjustments, or modifications to plans should be thoroughly documented and cataloged to help explain why changes may need to be made. And answers to any unresolved issues or unanswered questions need to be researched and prepared for discussion during future meetings or conversations.

7.07 Push and Pull Communications

Push, Pull, and Interactive Communication

Push

Push communication provides an easy way for senders to ensure that information is sent to the appropriate parties. Push communication can include emails, voicemails, faxes, memos, reports, or any other type of communication that the sender distributes asynchronously without the guarantee of feedback.

Sending information over email would be an example of push communication because the receiver does not interact with the sender. Push communication relies on the receiver of the messages to take the initiative of reading or hearing the message, so if a message is important, interactive communication might be a better choice.

Interactive Communication

Interactive communication methods provide the best way for the sender to confirm that information is received. This is because interactive communication is synchronous—information is sent and received at the same time.

Mutual feedback will ensure that both parties finish the interaction knowing that their messages were received. Interactive methods include meetings and conversations (in person, on the phone, or through the videoconferencing).

Interactive communication should be used when the sender needs feedback that indicates that the receiver definitively understood the message. People believe that face-to-face interactive communication is more effective because the receiver can see and hear the sender.

Feeling can be expressed better through interactive communication, so messages that have an emotional component should be communicated using interactive communication methods. However, because interactive communication may need to be scheduled, it can be less convenient than push or pull methods.

Pull

Pull communication allows the receiver of the message to pull information from a source on their own schedule. This is beneficial when there is a lot of information or many receivers and it would not be practical for the sender to initiate interactive or push communication with all the receivers.

You can make information available on a pull basis by using databases, the Internet, an organization's intranet, or other repositories of information. Information posted online would be an example of pull communication.

The Advantages of Pull Communication

Project practitioners should consider providing important information on a "pull" basis rather than on a "push" basis. Pull communication allows interested parties to access the information they need when they need it; they don't have to wait for a report or message to be sent to them—they can access data on demand or on their own schedule.

Pull communication uses computer databases, intranets, or other repositories to make information available. Pull communication is especially helpful when it's not practical for a project team to compile information and "push" it to the receiver or to initiate interactive communication with the many parties involved. (Because push communication requires the creation of an email, voicemail, or other type of report that must be sent to interested parties, it can be very time-consuming for project practitioners to execute.)

To be effective, the pull communication tools that are used need to be updated regularly to ensure that they contain the latest information. If stakeholders find that information is not current, they will bypass these tools and interrupt project work asking for updates to project status and information.

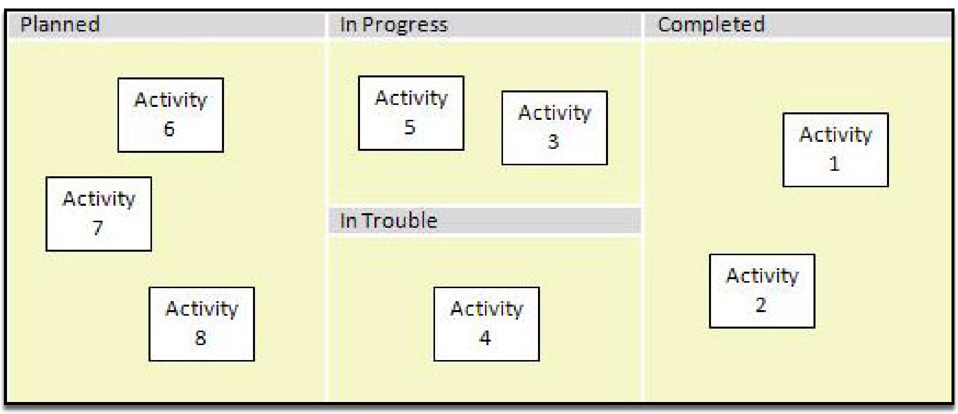
7.07.1 Exercise: Push, Pull, and Interactive Communication

This assignment does not contain any printable content.

7.08 Kanban Boards

Kanban Boards

Another tool that project practitioners use to allow for pull communication is the Kanban board. A Kanban board is a graphic that shows how much work is involved in different parts of the project at any given time. Tasks and activities are written on sticky notes, which are then moved across the board as work is completed. Interested stakeholders can access information quickly to see how much work is "planned," "in progress," "in trouble," or "completed" at any point in time. And because the Kanban board shows how many activities are in each part of a project, it quickly reveals any bottlenecks that result from having too much work in any single part of the project.



7.09 The Project Journal

The Project Journal

Throughout the project, practitioners should record their personal observations in a project journal.

The project journal is a notebook or work document that teams can use in project reviews and retrospectives to remind them of the good and bad things that happened during the project. The journal can be as formal or informal as needed as long as it serves its purpose—to remind participants of the issues they encountered as they worked on the project.

Some teams develop specific forms or templates to use, while others just use notes and bulleted lists to track information. Whatever format the team chooses to use, they should be sure to ask as many people as possible to keep a journal of their project work. Including as many people as is feasible guarantees that multiple viewpoints will be heard and ensures that details about issues will be uncovered, recorded, and better understood because the people closest to the work will be the ones tracking the issues and improvement opportunities related to it.

It is also helpful to record information from conversations that the team has had with external resources or stakeholders. These external resources may not be involved in retrospectives and lessons-learned meetings so having someone on the project team capture this information will ensure that important data is not lost at project end.

Many project participants wait until the end of a project to try to collect and collate the lessons they learned on the project. But looking back on the project inevitably leads to missed information and opportunities to improve projects. By recording this information as it happens, practitioners will have a more complete reference to work from to improve future projects and project work.

To compile the information collected and to more formally develop the contents of the project journal, the team will want to hold review meetings as they complete major project milestones or as they end project stages. During these review meetings, project leaders and managers can elicit the challenges that the team encountered and review lessons that were learned.

Once the project's objectives have been completed, the team should convene a final meeting to collate and archive the information collected in a format that can be understood by anyone accessing the project's records. By compiling positive results and recommendations for improvement, practitioners will provide future project participants with information they can use to avoid pitfalls and increase their chances of project success.

Video Commentary

The Project Journal

Rich Maltzman

Earlier I referred to the concept of closing taking place, even in the middle of the project by virtue of collecting lessons learned when the lesson was fresh in your mind.

The idea of a project journal, for a project manager or for team members but especially for project managers, is a very appealing one to me. I like the idea of either a written journal--a physically handwritten journal--or a blog where it's semi-public where the rest of the project team members can see the progress or notes that you've made about the discoveries along the project along the way.

And again, this can come in very handy at the end of the project when a lessons learned is done because you're not having to rely on your own memory recall. You can just scroll back up to March 17 and see what happened on that date in terms of something tremendous that worked really well or something that you never want to do again.

So again, I really endorse this idea of a project journal, I really endorse the idea in particular of blogging a project or putting together a wiki where not only you but others can contribute on a daily basis to kind of an ongoing lessons learned, and it's just a wonderful way to archive the knowledge and, as I say, turn the knowledge into wisdom.

Rich Maltzman, PMP®, is the Learning and Professional Advancement Leader at a major telecom supplier.A contributor to the *PMBOK® Guide*, 4th Edition, he has co-authored PMP® Exam study guides. He is co-founder at EarthPM, LLC, and along with co-founder David Shirley, PMP®, has authored the book, *Green Project Management: Planet, Projects, Profits, and People*. He received a BSEE from the University of Massachusetts in Amherst and has a graduate degree in industrial engineering from Purdue University.

7.09.1 Exercise: The Project Journal Crossword Puzzle

This assignment does not contain any printable content.

7.10 Managing and Empowering People to Execute the Project

Managing and Empowering People to Execute the Project

Managers and project leaders are accountable for the work performed on their projects, but they cannot do the work alone and must depend on the performance of their teams and direct reports for success. As such, managers must find an effective means for leading and supporting team members and project participants to complete the work as needed and to satisfy the expectations of higher management.

Delegation

Delegation is a key tool for any manager. It can prove to be a very effective way for a manager to achieve results while still focusing his or her efforts on the high-value aspects of a project or task or on other aspects of the job.

Even experienced supervisors, however, must fight the tendency to either do the work themselves ("If you want something done right, you must do it yourself") or to micromanage when they delegate. They must trust that their team members will get the job done and make sure these people have been properly prepared for delegated assignments.

Effective Delegation
Define the task clearly, making sure that it is suitable for delegation.
Select an appropriate person to delegate to—one that you trust and is capable of completing the work successfully.
Provide clear instructions, including an explanation of why the task is important.
Establish the desired outcome.
Agree on timing and deadlines.
Support and communicate during the task.
Provide feedback on performance and results.

When delegating work, a manager should be sure that the person being delegated to is capable of handling the work and is given the authority to complete the task. At the same time, the manager remains responsible for the outcome even when parts of the work may be delegated.

One trap that managers must avoid is reverse delegation, where subordinates ask for their manager's assistance even when they are capable of completing the task. There is a famous 1999 *Harvard Business Review* article, "Who's Got the Monkey," that uses the metaphor of a monkey jumping from the employee's shoulder to that of the manager when upward delegation occurs. The article argued that managers need to stop taking responsibility for always being the problem solver in their area and be more assertive in challenging subordinates to look for independent solutions.

7.10.1 Empowerment

Empowerment

Another powerful tool for ensuring that project are executed effectively is empowerment.

Effective managers empower their team members, encouraging them to think, behave, take initiative, and make many decisions autonomously. Empowerment must ultimately come from the employee, but a work environment can be established that supports its use.

The Basics of Empowerment

To explore the topic of empowerment and management, please visit the online learning resource to download an excerpt from D. Quinn Mills' *Principles of Management*.

7.10.2 Empowerment in Practice

Empowerment in Practice

What does empowerment look like in practice?

The following chart outlines some of the ways in which team members may be granted responsibilities that traditionally have been handled solely by managers or leaders.

Examples of Empowerment

Team members are encouraged to establish their daily work schedule.
Team members are tasked with training new employees.
Team members are empowered to handle customer service issues.
Team members are entrusted with dealing with vendors.
Team members are cross-trained to fill multiple roles.
Team members are asked to prepare or analyze administrative reports.
Team members are empowered in self-managed work teams.

What does this mean for the role of the manager? Dennis C. Kinlaw has argued that in an organization that empowers its employees, managers will spend less time organizing, directing, checking, and assessing. Instead, Kinlaw, asserts the function of planning will become more prominent: "One of the ironies of empowerment is that it is forcing managers to do what they should have been doing more of the time, which is planning."[1]

How far should empowerment go? The *Wall Street Journal*'s Rachel Emma Silverman reported that "...research on the value of flat organizations has been mixed. One study, by researchers at the University of Iowa and Texas A&M University, found that teams of factory workers who supervised themselves tended to outperform workers in more traditional hierarchies, so long as team members got along well. 'The teams take over most of the management function themselves,' says co-author Stephen Courtright. 'They work with each other, they encourage and support each other, and they coordinate with outside teams. They collectively perform the role of a good manager.'"

Silverman noted that other studies "have found that hierarchies can sometimes boost group effectiveness, and that having a clearly defined role can help people work more efficiently."[2]

Notes

[1] Dennis C. Kinlaw, *The Practice of Empowerment: Making the Most of Human Competence* (Brookfield, VT: Gower, 1999).

[2] Rachel Emma Silverman, "Who's the Boss? There Isn't One," *Wall Street Journal*, June 19, 2012.

7.11 Collaborative Project Management

Collaborative Project Management

When teams must work across organizational boundaries to execute their projects, project leaders have to practice a form of collaborative project management that ensures that project work is prioritized but the needs of functional managers and department heads are also respected.

Collaborative project management is systematic way of planning and coordinating projects that cross departments or functions, or that involve project staff that are not under the direct control of the project manager. It is a way of aligning the needs of projects with the "day-to-day" work within departments, while ensuring that both meet their objectives and obligations.

Requirements

For a collaborative project management system to succeed, the following factors need to be considered:

Active involvement

> Collaborative project management requires the active involvement of many of the people in each department—not just the project or departmental managers—to ensure that all work is completed and work priorities are managed.

Communication

> Effective communication techniques must be followed, and information must be widely disseminated and available on demand, to ensure that everyone involved understands the work, the objectives for both the project and for daily operations, and any changes that may affect the attainment of goals. Often, it is helpful to create a central repository or database to make important information available on a pull basis, to allow participants to access information when and where they want it.

Coordination

> Projects that cross organizational boundaries can be thought of as "mega-projects," with the work in the different areas or departments classified as "sub-projects." As such, these mega-projects should have someone (or some group) leading and coordinating work (much like the scrum of scrums in Agile project environments), to ensure that processes flow well and do not break down unexpectedly. An organization's project management office can be particularly helpful in coordinating this effort.

Cross-boundary differences

> People in different areas or departments often have their own perspectives or use their own "language" to discuss what they do. In a collaborative project management environment, these differences need to be respected but a common language and understanding must be created to ensure that differences do not result in miscommunication or complicate the work that needs to be done.

Leadership

> In a collaborative project environment, those in charge must "lead" the work, not just "manage" it. Collaborative project management can be a complex undertaking so someone needs to set the tone and course for the work and ensure that people stay on task. And because there is often a lot of work that spans different areas of an organization, there should be a significant amount of delegation and empowerment of workers to make decisions and to complete activities.
>
> Leaders must also get those involved to think outside of their own areas or departments, and align work to the benefit of everyone involved. They need their staff to understand that both their "project work" and their "regular duties" are important to the organization and a balance must be found to ensure that all tasks and responsibilities are given the respect they deserve.

Quality control and quality assurance

> Those involved in collaborative project management need to be sure that the output from their work does not hamper or impede the work of other projects or departments. Quality control and quality assurance procedures need to be designed and implemented to prevent local improvements from causing more global issues or downstream problems.

Transparency

> For collaborative project management to succeed, a clear understanding of everyone's project roles, responsibilities, and objectives needs to be decided early and explained clearly. All work results must be open and transparent, to foster a sense of inclusion and trust among all involved parties.

Collaborative project management can be a challenge to implement but often produces faster results and more satisfied colleagues who are able to balance their responsibilities without undue stress or strain. It fosters relationships that are built on trust, respect, and mutual accountability, and aligns *all* of the needs of the organization to guarantee that new work is accomplished without sacrificing operational performance and excellence. It can, however, be a risky undertaking if not done well and can create lasting grievances and mistrust if it is instituted but not properly monitored and controlled.

7.12 Reviewing Deliverables

Reviewing Deliverables

To ensure that the deliverables created during the Executing stage continue to meet the requirements and specifications set forth in the Initiating and Planning stages, practitioners and project teams should install a sequence of "gates" that the project must pass through while work is being executed. The gates will serve as "go/no-go" decision points that will allow project participants to either:

- Continue the project as it is currently designed
- Continue the project but make modifications or adjustments to the original concept or design
- Cancel the project because it is not meeting expectations and cannot be saved

These gates should occur at natural "pause points" during the project—such as when an interim deliverable is created or when work is handed off to another stakeholder or group for elaboration.

Gate Reviews

Practitioners often hold gate review meetings to compare "current deliverables" with "expected deliverables." In other words, during gate reviews meetings, participants discuss the current state of the project and its deliverables, compare the current version of the deliverables with their expectations (of what these deliverables would look like at this point in the project), and make a decision about how to proceed. During this process, practitioners may also determine whether the anticipated results are worth the investments and risks involved in continuing the project.

Often a checklist is used to ensure that the existing deliverables are fully compliant with project requirements and specifications. These requirements are often quantified and defined as specific criteria that allow the review team to quickly assess progress and make their decision without having to engage in elaborate discussions. The criteria used should have been defined early in the project and should be transparent and well-known to all involved in the project.

The Gate Review Team

In addition to the practitioners working directly on the project, the people involved in each gate review should include:

- At least one member who has the authority to implement changes across the entire project and who is ensuring that the deliverables align with strategic objectives
- People from "outside" the project team who can provide objective opinions and feedback
- A customer or customer proxy who will ensure that customer viewpoints are included in the analysis

This group should have access to original scope descriptions and to any changes that the change control board has approved, to allow them to see why current deliverables may deviate from initial plans. It is often helpful to ensure that the composition of the review team remains fairly consistent; this will ensure that previous decisions won't have to be continuously revisited (to bring people up to speed on previous resolutions) and that the trust and respect built throughout the process is not endangered by a constant changeover of group members.

7.13 Project Management Plan Feedback

This assignment does not contain any printable content.

Module Feedback

This assignment does not contain any printable content.