PROJECT ORGANIZATION FUNDAMENTALS

How to Organize for Success

CMA Alberta
Continuous Professional Learning and Development

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TAKE-AWAYS

What are you looking to take away from this workshop?
WORKSHOP OBJECTIVES

Tools, Techniques and Practice:

- To correctly set up your project organization
- Recognize the mandatory skills and behaviours for some of the project roles
AGENDA

- Background
- Setting the Project Structure
- Roles & Responsibilities
- Skills
- Resources
- Practice Exercises
- Wrap-up and Evaluation
BACKGROUND

- Project environment
  - It is a change of the status quo
  - Time limited (defined start and end dates)
  - It has a budget
  - Typically has dedicated skilled resources (proven ability)
  - Distinct phases and deliverables
  - Specific outcome tied to a commitment
  - Task focus

- Line environment
  - Long-term support of company strategy
  - Employee development & growth
  - Doing as much as can be done within a given budget year
  - Service-minded
  - Directional focus
  - Operational in nature
Governance

Project oversight is about good organization and governance

Good organization and governance sets the stage for a successful project
FUNCTIONAL SUPPORT
• Contracts
• Training
• Human Resources
• Project Office
• Architecture Group
• Other

PROJECT SPONSOR

PROJECT STEERING COMMITTEE

Project Oversight

PROJECT MANAGER

BUSINESS LEADER

TECHNICAL LEADER

Subject Matter Expert(s) (SME)

ORGANIZATIONAL CHANGE LEADER

THIRD PARTIES
• Vendor
• Regulator
• Customer

SETTING THE PROJECT STRUCTURE
A Typical Project Organization Structure
SETTING THE PROJECT STRUCTURE
Organizational Structure Comparison

PROJECT ORGANIZATION

- PROJECT SPONSOR
- PROJECT MANAGER
  - BUSINESS LEADER
  - TECHNICAL LEADER

COMPANY ORGANIZATION

- CEO / CHAIRMAN
- PRESIDENT or COO
- VP
  - BOARD
  - VP
SETTING THE PROJECT STRUCTURE

Why the project challenges?

- Unique structure
- New to roles
- Communication channels untested
- Unofficial communication channels don’t exist
- Time to gel as a team
- Skills and fit to the assigned role
- Skills and fit with the project team
- Contract resources
- Responsibilities and authority
- Different decision behaviours
- Task focus
ROLES & RESPONSIBILITIES

- Sponsor
  - Project Governance
  - Business Outcomes
  - Business Value

- Project Manager
  - Execution
  - Scope, Schedule & Budget

Clarity of objective ↔ Clarity of objective
ROLES & RESPONSIBILITIES

- Delegation, Responsibility & Authority
  - Must align
  - Corporate authority
  - Your comfort
  - Line positional authority versus project role authority
  - Conflict of interest
ROLES & RESPONSIBILITIES

- Relationship
  - Remember that as a Sponsor, your Project Manager must be your best ally
  - Take time to build the relationship
  - Make sure the project manager is in tune with your needs
  - Ensure you have the necessary confidence in your project manager

Shared interest and mutual trust
Sponsor Role

The Sponsor is usually the senior person from the company’s business area for whom the solution is being implemented and will most likely be the major recipient or beneficiary of the derived business benefits.
ROLES & RESPONSIBILITIES

A Good Sponsor Is ………

Committed
Empowered
Credible
Communicator
Decisive
Demanding
Mine Sweeper
Visionary
Business Focused
Consistent

Certified Management Accountants

Ethier Associates
ROLES & RESPONSIBILITIES

- Steering Committee Role
  - Members of the SC assist the Sponsor with his/her duties
  - Stakeholders are usually present or at least adequately represented on the SC
  - The SC provides project governance
  - Members have the confidence and support of those they represent
ROLES & RESPONSIBILITIES

STEERING COMMITTEE ROLE

DID THE EXECUTIVE STEERING COMMITTEE APPROVE MY PROJECT?

WE AGREED ON A PREDECISIONAL DRAFT FRAMEWORK FOR MAKING THE DECISION.

DOES THAT MEAN ANYTHING?

IT DEPENDS WHAT YOU MEAN BY "ANYTHING."
ROLES & RESPONSIBILITIES

- Steering Committee Considerations
  - Project size, reach and impact
  - Risk
  - Knowledge
  - Authority
Project Manager Role

The PM is responsible for planning, leading, organizing, directing, monitoring and controlling the project execution along with delivering a quality result on time and within budget according to the parameters set out in the project plan and any subsequent approved changes to the scope, schedule and budget.

The PM reports to the Sponsor.
ROLES & RESPONSIBILITIES

Project Manager Role

Plan a Project

OUR PROJECT PLAN WILL FOLLOW THE USUAL ARC.

PHASE ONE WILL BE UNWARRANTED OPTIMISM SUPPORTED BY DELUSIONS OF COMPETENCE.

IN PHASE TWO, THE OBSTRUCTIONISTS WILL SLITHER OUT OF THEIR LAIRS AND TRY TO SMOTHER OUR DREAMS.

IGNORANCE AND ENVY WILL FUEL RUMORS THAT GET REPEATED UNTIL THEY MORPH INTO COMMON KNOWLEDGE.

RESOURCES WILL BE ALLOCATED BASED ON MISINFORMATION AND FAVORITISM.

AND REQUIREMENTS WILL DRIFT UNTIL THE PROJECT IS BOTH UNDESIRABLE AND IMPOSSIBLE.

THAT BRINGS US TO THE SECOND WEEK.

I WANT MY UNWARRANTED OPTIMISM BACK.
# Project Manager Role

## Plan a Project

<table>
<thead>
<tr>
<th>Project Framework</th>
<th>Develop Work Plan</th>
<th>Resource Requirements</th>
<th>Develop a Schedule</th>
<th>Prepare Budget</th>
<th>Develop Project Controls</th>
<th>Approve &amp; Baseline Plan</th>
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<tbody>
<tr>
<td>Identify Stakeholders</td>
<td>Specify Activities and Tasks</td>
<td>Determine Personnel Resource Requirements</td>
<td>Assign Tasks to Resources</td>
<td>Establish Project Standards</td>
<td>Establish Project Reporting</td>
<td>Document Issue Resolution Process</td>
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<td>Determine Objectives</td>
<td>Determine Best Estimate</td>
<td>Determine Hardware/Software Requirements</td>
<td>Put on Calendar w/ Milestones</td>
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<td>Document Change Mgmt Process</td>
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<tr>
<td>Define Scope</td>
<td>Determine Order of Tasks</td>
<td>Determine Space, Other Requirements</td>
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<td>Identify Constraints</td>
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<td>Determine Approach</td>
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<td>Define Key Deliverables</td>
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<td>Develop Risk Management Plan</td>
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*Certified Management Accountants*
SKILLS

Project Manager

- Project management competencies
- Leadership
- Communication
- Track record
SKILLS
Project Manager

Project Management Competencies

- Planning
- Estimating
- Organizing
- Delegating
- Decisive
- Judgment
- Interpersonal
- Tools
- Track record
- Business savvy

Professional designation?
Leadership Skills/Styles

- Collaborative
- Fair
- Situational
- Demanding
- Consistent
- Honest
- Teamwork

Learning Experience?
SKILLS
Project Manager

Excellent & Mature Communication

- Verbal
- Written
- Presentation
- Concise

- Clarity
- Unambiguous
- Accurate, honest & complete
- Audience sensitive
SKILLS

Project Manager

Excellent & Mature Communication
SKILLS
Project Manager

Track Record

- Previous experience on similar projects
- Success and failures

Subject matter expertise?
SKILLS
Project Manager Attributes

- Initiative
- Motivation
- Perseverance
RESOURCES
Project Reviews

- Set up
- Progress
- Lessons

- Use them
- Plan for them

THE PROJECT POST-MORTEM WILL ONLY BE HELPFUL IF EACH OF YOU IS HONEST ABOUT WHAT WENT WRONG.

YOUR COLOSSAL INEPTITUDE AS A LEADER SUPPRESSED OUR NATURAL TALENTS, LEAVING US LISTLESS AND UNFOCUSED.

AND BY "HONEST," I MEAN BLAMING PEOPLE WHO AREN'T HERE. LOOK! YOU'RE DOING IT AGAIN!
REVIEW ROLES & RESPONSIBILITIES
CLOSING THOUGHTS
CLOSING THOUGHTS

ESSENTIAL QUESTIONS

- Is the vision clear?
- Is my organization structure correct?
- Are the roles defined?
- Are the responsibilities clear for each role?
- Do I have the right project manager for the project?
- Do I have the right skills and knowledge represented on the steering committee?
- Are the lines of communication between roles clear and understood by everyone?
- Are there any conflicts of interest?
- Do I have confidence in the project manager?
- Do I trust the project manager?
- Have I delegated the right authority to the project manager?
- Does the delegated authority align with the project manager’s responsibilities?
- Is the project positioned for success?
- Will I fulfill my role expectations and responsibilities towards the project for the duration of the project?
- Should I instruct the project manager to plan for a project review?
CLOSING THOUGHTS

- Take the time to organize properly.
- You will avoid performance-related, time consuming issues that increase the risk of not achieving the business results.
CLOSING THOUGHTS

So let’s see what we’ve learned.
Project management
Business process innovation
Business systems analysis

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