

Slide 1 : Title page



Project Visibility in a SME : Experience report

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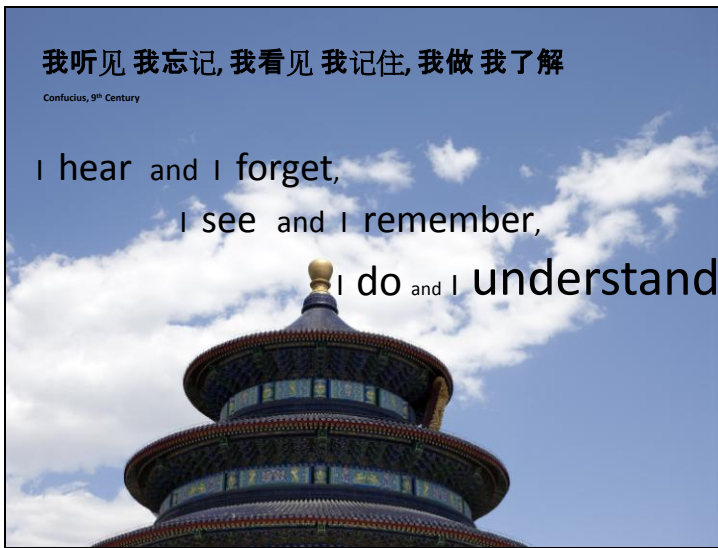
MN – Maybe you can find this a strange presenter pair- coming from different companies- but Sven and I did many projects together and continue to share the enthusiasm for the PM profession and share war stories about our projects together. Today is Sven presentation – I am here for moral support and ask some critical questions – since the presentation will be a surprise to me too !

Introduction Sven

Introduction Mark



Slide 2 : Confucius



MN -(Mark reads quote.)

Thought we would talk about some concrete PM application - “project visibility”, now you show a Confucius quote ? Pretty vague, right?

SM -OK, Mark, let me explain.

This quote is about the essence of what we want to bring across today. One needs to actually apply learnt things to really understand them and to get results. This is the principle realization that we used when working on creating “project visibility” at LAR.

Just reading or hearing about project and programme management does not make you execute anything.

The case story tells a story about LAR but LAR stands as synonym for many SME’s.

MN - OK then, have a go at trying to explain this to us all.

Slide 3 – LAR



The slide content is enclosed in a black rectangular border. At the top left is the Luxembourg Air Rescue logo, which is a circular emblem with a red and white Maltese cross in the center, the word 'LUXEMBOURG' at the top, and 'AIR RESCUE' at the bottom. To the right of the logo is a photograph of a blue and white helicopter on a tarmac with a building in the background. Below the logo, the text 'In depth Contextual knowledge' is written. Underneath this, the words 'Individual,' 'Team', and 'Organisation.' are arranged horizontally, separated by the word 'and'. Each of these three terms is accompanied by a small photograph: 'Individual' shows a person wearing a flight helmet and goggles; 'Team' shows two people working on a medical patient lying on a stretcher; 'Organisation' shows a group of people in white uniforms standing near the open door of an aircraft.

SM – To start, let first introduce you to LAR (SM introduces LAR)

MN – *Ok, but what is with these terms – contextual, individual, team, org ?*

SM – LAR individual, team and org have a very strong knowledge about what they are operating in today – that is the current context. And as per Confucius – LAR understands and thus operates excellent in and on this current context of aviation in combination with medical rescue services.

MN – *I understand – context is what companies actually do, produce etc. So, what is next*

Slide 4 – Golfer



MN – *Now ? a crow bar and a golf player? You confuse me now...?*

SM – To organize the current activities a specific technical knowledge is required, although the toolset can be rather comprehensive and “set in its ways” – that is what illustrates the crowbar - removing nails with a crow bar is very effective if this is what you need to do but does not allow you to develop dramatically over what you can do with a crowbar.

MN – *So what about the golf player?*

SM – When I joined LAR 2 years ago, I came from a different context, having worked for an international industrial company, coming from marketing and business development background, with different technical tools. Coming from a different context allowing me to look at LAR activities from a different perspective,. I started to use this “acquired extended toolset” to look for distinct defined presence of activities... both to keep managing the current context but also looking at activities to develop LAR.

MN – *What do you mean by “look for” – do you imply they were not easy to find ?*

SM – I will explain – let’s look at the next picture..

Slide 5: Storage



MN – So what did u specifically do then to when “looking for”?

SM – the first weeks, I kept on asking everybody about what they are working on and if this is defined somehow within a “frame”, not even using the word project. While asking my questions, we created a project/activity list with some descriptive of the activities, clustering them already by type of activities and in what way / how somehow is informally leading them. We found some 70 initiatives – which was a revelation.

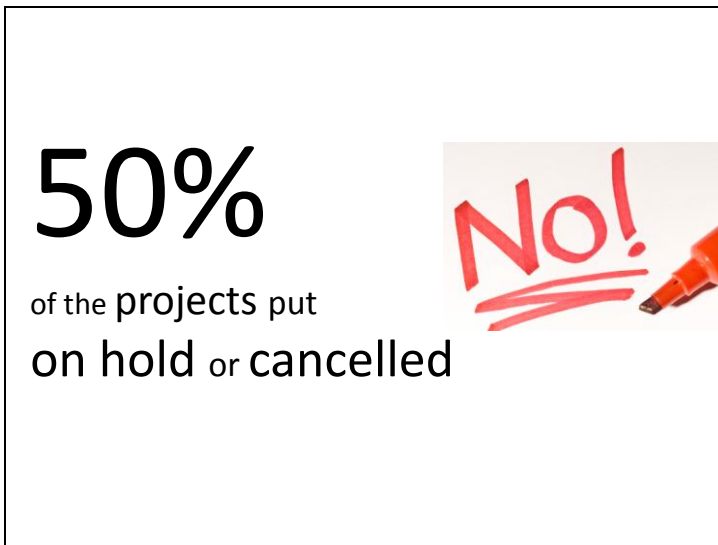
With this list, we reviewed within the management which projects (still) make sense and are aligned with what we wanted to achieve that year, and who should be owning it at senior management.

This exercise allowed people at different levels of our company to realize that we needed to make the distinction between daily operational tasks and projects to develop or maintain processes/context and that we needed to know who works on what, when and what the status is. To do this effectively, one needs to give projects a real identity (name, number, ...) so that we could associate activities to them.

MN – so how would you summarize first deliveries

SM – Very simply, in a SME it is even more important than in a bigger company to show quick results to prove that the approach adds value. One need to pick 1 or 2 projects and show that applying simple tools and focus actually delivers results.

Slide 6 - 50%



MN – *so looks like you stopped everything dead in his tracks?*

SM – NO. We found that quite some projects had no direct relationship to the short, medium or long term strategy of our company. Others were not in the state yet that we could execute them – requiring some preliminary work or simply a business case to go after it.

We did **not kill** 50%, but it is an illusion anyway that we were executing on everything; we just clearly articulated this and started to make choices. Would you not say that 50% is a good guess for any company not having an overview on their project?

MN – *Yes indeed. I went through a similar exercise at Husky and uncovered 1182 projects in 1 business group which meant that if you did the maths that everybody in that business group with occupied doing projects only. This led to awareness in management that they needed to tie the projects to strategy and make choices.*

- *How did you make your choices, which criteria did you use?*

SM – In a small company, people and especially management, are so deeply involved and know what they do that we could very simply decide what makes sense and what not. Key is to HAVE the list in order to review the initiatives. No need to have sophisticated decision criteria models.

Slide 7 – More Tools



MN – *There is the crow bar again, but this time there are more tools as well?*

SM – Yes, what we did next is to make people and teams aware that there are proven tools out there to better run projects and control project environment and started to explain, train them on some of them.

MN – *So by “some” you mean, only 7 tools and not all the tools on this planet?*

SM – Exactly. This is back to Confucius. Better that people know and apply a decent tool set well, rather than telling and showing them all the tools and letting them forget them again.

MN – *Can you explain this in more concrete terms to me?*

SM – Ok, some examples. We concentrated very much on project start up and project planning. Once people understand the message you love so much “go slow to go fast” you start to change the behaviour. To quote some, we emphasised a lot on what we call project brief, highlight reports, the concept of a project sponsor and providing an electronic storage place for each project on our file server.

Slide 8 – Tanja

Pragmatism
and
first successes



MN – *Oh ? What is the picture of my daughter doing in our presentation?*

SM – You told me that she is writing a book and wanted to make a movie out of this?

MN – *Yep. She is 15. And as a PM nerd that I am, I actually coached her on some basics as u see in the picture. In front of her she has a PBS and some other planning documents. And she is actually executing on it and is realizing that when everything is done she has on the PBS that the project is finished – that simple.*

SM – Which proves the point that with a limited but properly understood and used tool set and a golf player next to her she can very fast get somewhere. This is exactly how you could describe the situation in a SME.

MN – *Do have some examples from LAR?*

SM – The training approach on real case projects probably best describes the approach. Explaining the tools on projects and engendering direct outcomes with a coach delivered satisfaction and immediate results. We did not run any formal generic training. We generated interest in the methods due to showing results – so maybe later on people are inclined to go for more “generic” training.

Slide 9 – Team and Individual Behaviour



MN – *Superman or hero ? – ripping his shirt off....*

SM – We already briefly talked about behaviour change. Before having the visibility of the different projects a lot of heroism was required to get something done and of course each department had their ideas on what was most important - resulting in confrontation between individuals and teams.

MN – *So you noticed some distinct changes at LAR?*

SM - Having a much clearer view on what needs to be worked on and what not and what it takes to execute we could actually see a change in individual's and team's behaviour. The realization that cross functional efforts are essential to get more stuff done and that there are decisions taken generates the "pull on one rope in one direction" feeling.

Slide 10 Management



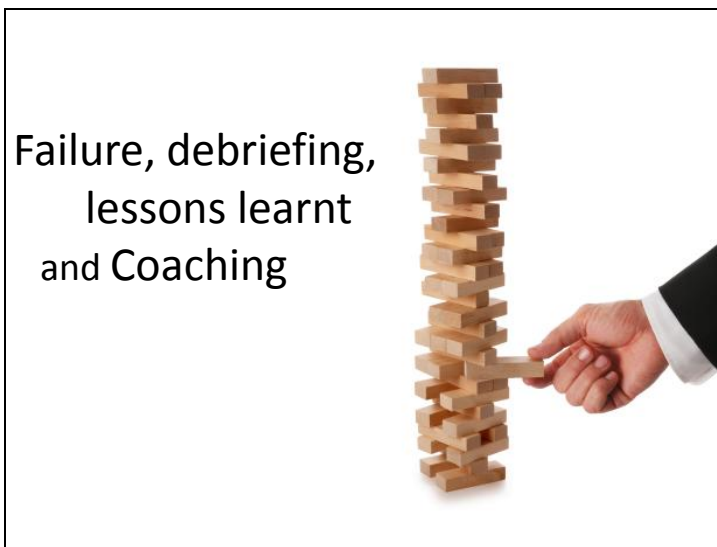
SM – Having better project visibility forced us on one side (now it was “visible” on what decision needed to be made) and allowed us on the other to take more decisions in terms of acknowledging importance of projects, making choices, set priorities, determine which changes you want to make and make sure they are successfully executed.

More projects we did, more the realization set in that we now could not only better react to changes but also find a better balance with driving context change.

MN – *Is this implying that the technical tool set was extended to management?*

SM – Indeed, by talking projects and introducing sequencing of projects through illustration of simple roadmaps we naturally started to think strategy execution through programmes, again without any formal generic training but again by living and applying. Sounds ass-backwards – but really effective – but you need the golf player alongside...

Slide 11 – Lessons learned



MN – *So now realism sets in – not everything went smooth ?*

SM – Of course it would be wrong to tell you that everything ran great right from day 1. But we said that it was learning by doing – so we did – remember Confucius. In an SME, you do not have many spare capacity or resources anywhere, so we also had to choose on which projects we were more rigorously applying the tools when starting out. Facts of life.

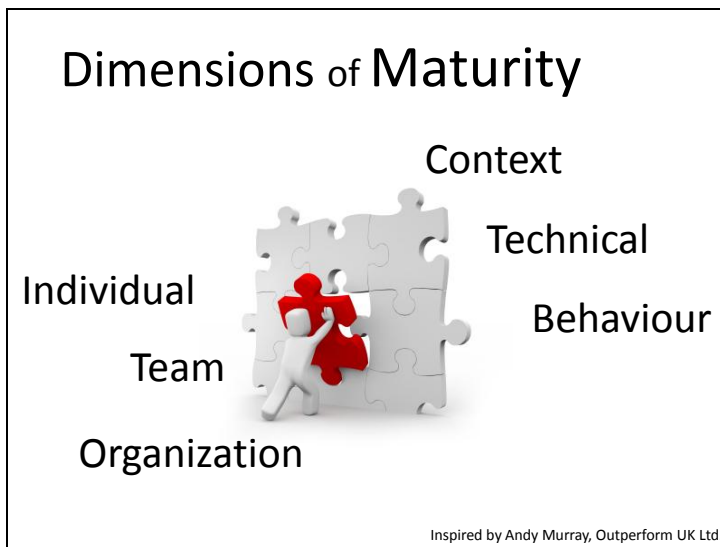
MN – *What did not work out and how did you react?*

SM – Any thing can go wrong. But people learn best from their own experience. The key is to take the time to consciously debrief and understand what went wrong- otherwise odds are big that the wrong things remain behind as learning. Coaching on actual project is a very good approach.

One other essential tool to mention is the lessons learnt report. Very easy, very pragmatic and as stored in the project folder accessible for future use. This was very rapidly understood and applied.

One example I could quote is about public tenders with some repetitive aspects but always specific demands. Debriefing why you did not win a tender is crucial to increase the chances for the next attempt.

Slide 12 - 3x3 debrief



MN – *At last all the buzz words on one page !*

SM – In the slides so far, we used all these concepts. Let's put them now in relationship. So just to see if you paid attention, could you give us your take on them?

MN – *Ok so there are six aspects in 2 dimensions.... Context = what a company is actually doing – market it is in, products it produces, services it delivers (management of current situation or change); Technical = are all the tools and processes used to manage the context; Behaviour = all cultural aspects of community of people within a company – All these three aspects have a bearing on each other...*

And in the other "dimension" - these 3 aspects have their specific meaning for, relationship to and impact on an individual, team and the organisational levels.

SM – Very correct. So that makes a 3x3 matrix – with total 9 elements. Allow me to add that each of the 9 elements can be looked at separately and that as a whole they depict the "character" of a company.

MN - *I paid attention and noted that we did not really touch on organizational behaviour so far.*

Slide 13 – Organizational Behaviour – Tactics



SM – Yes, well observed, I sure that the others here noticed as well.

MN – *So what do we see here?*

SM - Using the project list at strategic and tactical level is a change in the organisational behaviour. Projects and their relationship to each other as well as to the company's objectives become like planning tactics of a sports team. Ultimately the organization starts planning projects as they plan operations.

Slide 14 – Taxis



MN – *Taxis?*

SM – I like this picture very much as it reflects perfectly the reality of managing projects and programmes. Taxis move at different pace, in different lanes, with different destinations, different drivers, some can overtake others, some can't. Some drivers take more risks, some passengers or “payload” are more important than others

Some talk to each other, all of them talk to their coordination centre.

You can just go on and on.

Crux is that project and programme management is dynamic - and that a company needs to have an adequate rate of control over the dynamism to allow for an optimal output.

Slide 15 – Maturity



MN – “multidimensional” - Here we are again on the 3x3 grid?

SM – Yes, the relationship with maturity is that if you see a change in any of the 3x3 elements you are either increasing or decreasing your maturity. Changes can be driven by your activities i.e. learning, striving for new context; or they can be caused by external factors i.e. imposed contextual change – people leaving, new tools becoming available, laws....

MN – Hence the hand of the boy up there. Yesterday he was still this big, but now he shrunk.

SM – Yes exactly and he wants to grow again i.e. meaning that company maturity is a constant grow and shrink cycle.

MN – Ok, so you mean that absolute maturity does not exist. i.e. the classic 1-5 where everybody wants to be a 5 but settles for a 3

SM – Yes. Companies reaching 5, would imply that there are no changes in the 3x3 matrix anymore, which would probably mean that they would not survive for very long – and is unrealistic that this ever happens in our “real world”. Therefore, I am convinced of the dynamic aspect of maturity -subject to the elements of the 3x3 matrix over time.

Slide 16 – Buzzwords



Pragmatism
Perseverance
Energy

MN – *So 3 words to summarize it all? – I saw these on the interview you did for Spiral – Keys of success of a SME eh !*

SM – In SME, approaches need to be pragmatic as smaller companies have less patience and call more for hands on. SME's can embrace new ideas faster than bigger companies, but the downside is that they often abandon them faster as well if there are no proven results. Lastly, in a small company one fully powered up resource can make a lot of a difference and pull others along.



Slide 17 – Yes we can



MN – *Is this “Yes we can.” ?*

SM – No. I very much think that “Yes we can” mainly relates to the behaviour aspects of the 3x3 matrix.

“Those who can - will” introduces the relationship between the 3 aspects of behaviour, contexts and technical. Those who are capable of shaping the behavioural aspect and really use the appropriate tools, will be able to shape their context and thus their own future.

MN – *So this very much closes the circle on Confucius – I do and I understand.....*

SM – Think you have got it, sorry for the long explanation. Anybody who did not get it can ask questions now – and I will start from the beginning...



Slide 18 - Transcript



Please download this transcript at www.traxxion.eu

Also be on the lookout for our Whitepaper on “**PM in a SME– Straightforward**”, which will appear on the TrAxxion site soon.

