Object Lessons: Lessons Learned

The following three sections bring you three real-life personal mini case studies. Each provides an example from which important lessons may be learned.

The first "Project Management in Education" was a seminar project that a colleague and I undertook to bring this discipline to a publicly funded organization. It demonstrates vividly how, in spite of a carefully prepared plan and patient collection of "customer requirements" input, the project can still go horribly wrong.

The second "Major Airport Expansion" describes how a difficult project proposal was salvaged and, much to everyone's surprise, secured a contract award. The key was a simple understanding of the Project Management Institute's body of knowledge

The third "Facilitating a Major Program Startup" describes how a major administrative environmental-driven project was successfully launched in an organization much more familiar with the bricks and mortar type of project. In this environment the prevailing culture was more attuned to "Tell me what to do, and I'll do it, but don't waste my time otherwise!" The key in this case was to hold not one, but several carefully planned startup meetings.

Project Management in Education

Sometime ago, a colleague and I were invited to propose on providing project management training to a government supported education provider. This enterprise covered a wide range of topics through a variety of media, including local TV. They were, therefore, collectively involved in a large number of in-house assignments or "projects".

Quite a small group within the organization felt that their efforts would be better served if the concept of project management could be introduced. Indeed, in their spare time over a couple of years, they had developed some philosophies, procedures, life-cycle steps, and so on. The time had come, they felt, to broadcast the good word, but "credible experts" were needed for the task.

Funds were raised and, as of necessity, the Personnel Department were authorized to hire consultants (us). Knowing how important it is to get on the right track, use the right cultural language of the organization, and send the right messages, we had included two meetings with the "working committee" as part of our proposal. The first was to flesh out and agree the content outlined in our proposal and the second to confirm the training product and review the workbook we had by then prepared.

The training would consist of two four-day workshops, each to a separate group with follow-up to be provided several weeks later. It would cover forty to fifty people in all. We were assured that the attendees would be experienced in managing the enterprise's projects.

We should have known we were in trouble by the second meeting because
1. The manager responsible was not present at the second meeting
2. The composition of attendees at the two working group meetings were quite different
3. A recent personnel survey just released showed that the organization's morale was at a low ebb,
4. The Personnel Manager responsible for hiring consultants was transferred to "other priorities", and
5. Only one member of the working group would actually attend the workshops.

The first workshop was arranged to take place just before Christmas. In the event,
- All regular hotel meeting rooms in the vicinity were booked and we were squeezed into the reception room of a small restaurant.
- The Personnel Manager only managed to notify the designated attendees on the Friday before the Monday 8 am start
- The manager responsible distributed quite a package of departmental reading and a self test on his material to be done over the weekend, ostensibly in preparation for the course, and
- The attendees were all members of the organization's union.

In order to raise the profile of the workshops and to demonstrate top management commitment to the project management concept, we prudently arranged for the organization's president to open the workshop with some suitable introductory remarks. Unfortunately, the president had not been briefed on our location, and when he eventually tracked us down, arrived over half an hour after we had started. From then on, it only got worse.

Collectively, the group was justifiably miffed at the short notice, the mandatory direction to attend at a busy time of the year (work interrupted by Christmas partying?) and, of course, the extra-curricular weekend homework. Two individuals in particular seemed to be determined to be non-responsive and made a repeated play that "they were confused" by the instructors. (I learned later that the supervisor of one of them was also at the same workshop.)

Somehow, we struggled through a very painful four days. Needless to say, the second workshop was canceled outright. We insisted on a de-briefing meeting to the "working group" at our own expense. This time the manager was present, flanked by yet another group of people. The best we could do was to establish that we had indeed delivered exactly what had been agreed upon and point out that those attending had somehow been inadequately prepared.

The issue of "customer satisfaction" was never even raised!

Major Airport Expansion

This story is about the Project Management Institute's ("PMI") Project Management Body of Knowledge ("PMBoK") and took place a few years ago. As you will know from my Contact Info [Link], I live in Vancouver and the engineering consulting company I used to work for here has their head office in The Big City, some 3000 mile to the east.

Now our head office received a government proposal call to provide project management services for adding an extension to The Big City's International Airport, one of the busiest in Canada. I should add that the services in question were something of a departure from government's normal way of doing business and called for a very tight schedule. In fact, only three companies were invited to propose. This was also something of a risk for the government department concerned, not just because of the approach but because their standing procedures required that three submissions must be obtained before a selection could be made and the process progress further.

At the time our head office had most of their project management people on overseas assignment. So the proposal was handed on to a group of four others assembled to prepare a response. Four weeks were available for this purpose. Clearly, the proposal was very important to the company. Not that there was a good chance of winning it, in fact the other respondents were considered to be much better placed. Rather, failure to make a submission would put the government department in a difficult position and our company would be in the dog box.

Now, by the end of the last week but one, the worthy four in our team had prepared scads of notes, analyses, little schedules and other exciting things. But at that point they seemed to have got thoroughly stuck. They couldn't seem to pull it all together. The Senior Vice-President responsible realized they were in serious trouble.

In desperation they cast around to see who they had in the company who might be able to "fix it". As luck would have it, they found this guy in Vancouver (me), a member of PMI, and they said to themselves "Well, he's heavily into this project management thing and is supposed to know what to do, so let's get him involved" Thus, I was sent to The Big City to sort it all out.

By the time I got there, there was less than a week left. So I sat down with the group and reviewed with them what material they had. As I said, scads of notes and things, but nothing you could call the elements of a proposal. In fact, they hadn't even developed an index — something that they could hang the rest on to.

At the time, I had little or no experience of building an airport, nor am I a transportation project manager. Moreover, there seemed to be few clues on how to respond to the proposal call effectively. So I went away and read the big, fat government document and all the material generated to date to figure out how we could pull it all together.

Then I thought: What experience can I draw upon? And then, bingo! How about the PMBoK and its eight functional areas? That should provide a good starting point! So I reassembled the troops and told them "OK gang. Here's what we'll work to. First of all, describe the scope, etc., etc., all the way down

the eight PMBoK functions."

By this time it was the Friday before the submission on the following Tuesday and a long week-end at that. The Vice-President was intent upon reviewing the product on the Monday. Bear in mind also that the group had not been too enthused over this joker from Vancouver coming to tell a bunch of head office folks what to do. Sort of a pride thing. Nevertheless, they all perked up immediately and said "Hey, that's not such a bad idea!"

To cut a long story short, they got very excited and said "We need secretaries!" We managed to persuade four secretaries to come in and work about eighteen-hour shifts over the long weekend and rounded up nine personal computers for every one to work on. It is difficult to understand how they did it all. My job was to sit in the background offering advice when necessary, the way a project manager usually does. By the Monday morning they had got a good looking document together — much to the surprise and relief of the Vice-President, I might add.

After he had reviewed it, and made a number of refinements, we got out a good final copy, complete with charts and diagrams and delivered the document just before the Tuesday's twelve noon deadline. Since we had satisfied the requirements, I thought, good, I can go home. The government will be satisfied and everything will move on as usual.

However, there is a postscript to this story. About five weeks later I got a telephone call in Vancouver. They said "Oh, by the way, we're flying you to The Big City to take charge of this project." I said, "What project?" Well, you guessed the answer to that one!

As we got in and worked on it, I had an opportunity to ask the government's project director "How is it that we were awarded this work?" (because by then it was generally well known that we were not exactly the lowest bidder.) He replied "Your submission, structured the way it was, was the only one of the three that made sense to us. So, we gave you the work."

It proved to be a difficult project technologically, but three years later we had employed a lot of people and made reasonable money in the process.

Facilitating a Major Program Startup

This little story describes the injection of project management into the very successful start-up of a large comprehensive and complex administrative program. The organization is large, with many administrative and operational divisions, and conducts activities throughout our province. The organization itself is not unfamiliar with project management, as it has a project management division. However, this division is primarily concerned with planning and implementing projects of the bricks and mortar type.

The objective of the program would be to reduce by 50% all forms of waste from the enterprise by the year 2000. This waste ranged from paper, toner cartridges and other office consumables, to industrial waste, construction waste, oils and paints, etc. Substantial research and pilot studies had been conducted over the last few years to establish waste streams, opportunities for waste reduction, technical feasibility, and management strategies for tracking progress on waste reduction. Now, however, was the time to bring in the key personnel from all locations and commence serious implementation of the program. I was invited to assist the program manager with developing a startup plan and facilitate startup meetings.

We decided that a series of three startup meeting would be needed and appropriate for such a high-profile and complex company-wide program covering such an extended period. Each meeting would involve people coming in from out-of-town and last five to six hours. At the outset, although everyone would be from the same organization, few would actually know each other.

In brief, the purpose of the meetings were to be as follows. The first meeting would be to:
- Explain the program goals and rationale
- Identify potential projects within the program to support the goals
- Suggest possible ranking and responsibilities
- Activate initial tasks
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The second meeting would be to
- Present a brief but relevant project management training session
- Develop a WBS
- Revise priorities as appropriate
- Initiate development of project scope descriptions, and quality, time and cost estimate proforma for purposes of funding, and
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The third meeting was to
- Aggregate the proforma submissions into a consolidated fiscal plan for senior management approval and special funding
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In short, these meetings went extremely well, even though many of those present were not familiar with project management. Though skeptical and uncertain at first, everyone got to know each other comfortably, became very enthusiastic, and enjoyed working together.

Perhaps the highest compliment came from the organization's Public Relations Manager at the end of the last meeting. He said that one of his principle tasks was to improve communication within and

between the various arms of the enterprise. He was so impressed with the spirit of cooperation and quality of the communication going on back and forth at the meetings, especially since they came from different units, that he could hardly believe that he was working for the same company!