

## **Part II**

project management  
processes

Part II



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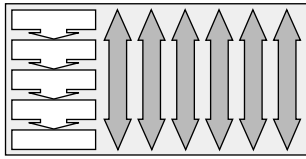
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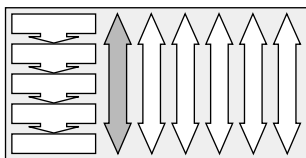




Projects must be broken down into manageable chunks, but the manager's job runs through all the chunks from the beginning of the project to the end. This job has many aspects, and in some ways it parallels the job of a company chief executive: policies must be set, plans made, customers listened to, costs managed, tasks allocated, and finance providers kept informed. All of this must be done not just to get it out of the way, but with a clear direction towards the goal of helping the firm. Project managers are busy people.

In this chapter, we will cover some of these project management tasks in more depth.

### ► What do we mean by project organization and team?



Work does not get done by projects; it gets done by people. Managing projects means managing people. A project manager needs to realize that this means that all those soft people issues that rarely get discussed are going to affect your ability to do your job. Here we present an overview of the topic but it is a topic of such importance that managers of all kinds should take every opportunity to learn more.

Before covering the people issues, it is worthwhile reviewing the various roles that people can play on a project.

### ► Project roles

Though different organizations may have different names for the roles, most will recognize the underlying responsibilities of the roles described here. This split of responsibilities has been found to be the most efficient way for projects to be controlled within an organization where many projects may be under way at once. If yours is the only project in the organization then you may not need some of the roles, but if your organization is trying to run several projects at once without, for example, sponsors or a programme board, then there is likely to be widespread misallocation of money and resources.

#### ► Sponsor

The project sponsor is a senior manager who wants the project, usually because it will benefit them in some way. In some cases the sponsor may see the need for the project themselves, but in other cases the suggestion may come from elsewhere in

the firm and the sponsor then adopts the idea. If there are several senior managers who will all benefit from the project then it is important that this group agrees to nominate a single representative to avoid confusion.

The sponsor's role is necessary because it is impractical for the whole management of the organization to be involved in every supervision decision. The organization therefore charges the individual who hopes to get the benefits of a successful project with the responsibility and authority for project supervision. This is not the same as project management – it is rather someone who acts as the buyer of the project on behalf of the firm. Conceptually, the sponsor has a business need for the project, the firm grants the sponsor the money and resources for the project, and the sponsor then contracts with the project team to execute the project. Hence in project organization terms the project manager works for the project sponsor, who works for the business.

The sponsor's focus is on the business objectives, and it is common for there to be little contact with the sponsor other than at major project events except if the project is drifting off track and it looks like the business objectives will not be met. It is the sponsor who has the final responsibility to protect the business by intervening if required to get the project back on track or, if necessary, to cancel the project before extra money is wasted.

### ► **Project manager**

The project manager contracts with the sponsor to manage the project defined in the Project Initiation Document. In most organizations, the project manager has authority to use money and resources up to the limits set out in the PID, but no more. If the project manager learns that the project will take more than was authorized when the PID was approved then it is vital to seek re-approval on the new basis otherwise the project manager will have no authority to proceed.

The project manager plans, organizes, controls and reports project activities. On smaller projects, the project manager may also undertake some of those activities.

### ► **Team member**

Team members carry out tasks or groups of tasks specified by the project manager, with agreed deliverables and to agreed timescales. Team members are expected to take responsibility for their own tasks, to keep the project manager informed about progress and to exercise initiative if they become aware of other factors outside their specific task that might also affect the project.

### ► **Programme board**

In most organizations where there are several projects running at once there is a committee that meets regularly to oversee the project portfolio (a programme is a co-ordinated family of projects). The programme board reviews, approves and prioritizes project proposals as well as authorizing resource allocation. It monitors project exceptions and instigates corrective action.

### ► Project support office

Some companies run enough projects to justify having a small department whose role is to support projects and project managers. The details of the role will vary but it may include such things as:

- ◆ Selecting and supporting project planning software.
- ◆ Co-ordinating project resource usage across the organization – possibly by maintaining the resource databases linked to the organization’s project planning software.
- ◆ Disseminating best practice in project management across the firm, for example by arranging training or by ensuring that all project managers use the company projects handbook if there is one. The project support office may be a valuable source of advice for people just taking on their first project.
- ◆ Representing the projects’ function in discussions within the firm concerning infrastructure, quality procedures and so on.
- ◆ Creating and maintaining standard forms for project proposals, PIDs, checklists and commonly-used project procedures.
- ◆ Possibly, collating project proposals and progress reports on behalf of project managers and handling the interface with the programme board. This may also mean a responsibility for checking and enforcing minimum standards in the documentation submitted.

### ► Stakeholders

Each project will have a group of interested individuals inside and sometimes outside the organization. These may include:

- ◆ The direct users of the project output.
- ◆ Those elsewhere in the organization whose day-to-day jobs will be affected by the project.
- ◆ Managers and team members of other projects which depend on this project to provide either certain outputs or to make resources available by a certain date.
- ◆ People outside the organization who have a particular view about what the organization or the project are trying to achieve and who may cause considerable damage to the organization’s good name if they feel that actions are inappropriate.
- ◆ Previous buyers of goods or services who may react positively or negatively to news about the development.
- ◆ Suppliers and distributors who may be fearful that the changes implied by the project will mean a loss of business.

The role of such groups in a project must be dealt with on a case-by-case basis. Projects can have far-reaching effects and one of the potential pitfalls of project management is to believe that the only people who matter are those on the project team and the end-users. Stakeholders is a loose category but the unifying

features are that their opinion matters in some way, and they often choose themselves rather than being appointed by the project manager. Their impact can be very great on some projects and in some sectors companies have developed standard contingency plans that are applied on all projects. On the positive side, a network of enthusiastic supporters of a project is one of the hallmarks of a truly successful project and can itself contribute to that success.

Stakeholder management has much in common with public relations, but project leaders do not need to become public relations specialists. On small projects it is usually enough to remember that there are interested parties outside the formal project boundary, and to make an effort to communicate with them.

### ► **Specialist advisors**

Expert advisors can often add value quickly if they are used appropriately to address a specific problem within their area of expertise. Such inputs from internal or external experts may not merit full inclusion in the project team, though time and budget will always have to be set aside for briefing.

### ► **External suppliers**

It is common for projects to rely on external suppliers for some of their critical outputs. The supplier might take on a sub-project but you, the project manager, are still responsible for overall delivery and the project manager should manage the supplier with no less care and attention than internal resources. Suppliers should be set SMART objectives and be required to give timely and accurate progress reports like other members of the team.

### ► **End-users and end-user representative**

The end-users are the people through whom the business benefits of the project will be obtained. They take the project output and use it to improve the organization's performance. This makes them a critically important group.

Their most formal relationship with the project is usually in specifying the user needs at the beginning of the project, and in accepting the project outputs at the end. During the project, the role of the end-users will vary but they will usually be called upon to provide continuing guidance throughout the life of the project in order to ensure that the outputs never diverge from what they should be.

In order to keep communications working effectively it is normal for the user group to appoint a single point of contact to handle the interface with the project. In some cases this representative may need to have the authority to make binding decisions on behalf of the user group, including the decision to accept or reject changes in the project objectives.



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### Government of Singapore

Public sector bodies do not have a good reputation for project management, and the common problems with IT projects make government IT projects a particularly rich source of disaster stories. But in Singapore, most government IT projects are delivered on time and on budget. This feat arises from the rigorous application of some basic principles along the same lines as those described in this book. For example:

- ◆ Good project management skills are applied within a recognized framework that allows good project control.
- ◆ Plans are built around realistic estimates of timings, costs and resource needs.
- ◆ Every project has a sponsor who is held accountable for project success.

## Team management

Technology plays a substantial role in many projects and many project managers and team members have well-developed technology skills. Technology skills are necessary, but are they sufficient? It should be clear by now that project management is not a technology problem. Neither is it a data analysis problem or a market knowledge problem or a sales problem. Instead, it is all about organizing and working with people. Most people have the communications and people skills needed for basic project management, whether they are technologists, analysts, marketers or salesmen. However, some of these skills may need some polishing in order to be of value in project work since there is never time to use trial and error on projects. Even people who are quite good at the people management issues may not know why they do what they do, and so may have difficulty choosing the right course of action in a project that presents new challenges.

### Team selection

Every project manager wants the best experts on the team, but what if the best aren't available? And what if the best technical expert is available but only because nobody else will work with them? This is not some fuzzy side issue that you can ignore. Your team have got to be able to work together, and it is part of your job as a project manager to think about this.

Is there such a thing as a perfect team member? We might imagine a genius who knows every corner of their technical field, never gets sick, and always files their documents properly. What would you feel like having to work next to this person? Your answer probably reveals much about the sorts of people you like to work with

and so the real answer to the question about the perfect team member is that it depends on who else is in the team. Every project team is different and what is perfect in one will not work in another. So it is neither possible nor desirable to provide precise rules for team selection other than to say that fit with individuals in the team should be a factor.

Within this overall context, there are a few areas to consider:

- ◆ People like to work with friends, or at least people with whom they have worked in the past. Getting to know new people takes time and intellectual and emotional energy, and most people will save themselves the effort if possible. This means that an entirely new team in which nobody has worked together before will not work at full capacity until some time after the start. Contact time is needed to establish who is who and how people like to work together. If your project team is widely dispersed then they will probably never really understand how each project member works unless you make a special effort to bring them together to work as a group at the start of the project. If the activities in your plan are well compartmentalized and you have briefed everyone well, then it is possible to run the project without the team knowing each other. But this is rarely beneficial.
- ◆ If a team is made up mostly of people who have worked together before, with one or two new faces, then take care to ensure that the new joiners fit. Groups develop their own subculture and a new joiner can sometimes break the rules without noticing; this can sometimes lead to rejection of the new joiner unless someone realizes what is going on and intervenes. This theory is easy but these situations are hard to spot. The rejection will be a matter of subtle group dynamics and it may not be obvious that it has happened. A new joiner may feel isolated and demotivated when it becomes obvious that everyone on the team is friendly with everyone else except them. The rest of the team in this situation is being lazy about including the joiner, but people cannot be ordered to be friendly. Take special care to emphasize that the joiner belongs to the group and to ensure that they do not get left out of group social activities. There is a particular version of this problem if you, the project leader, are the new person on an existing team. This is examined in more depth below.
- ◆ Teams under pressure tend to reach for and adapt the first likely-looking solution. If a team has worked together on a similar problem before, they are very likely to revert to their previous solution if they need to save time. This reuse of pre-existing solutions is an excellent example of organizational learning and is one of the ways that firms build competitive advantage. However, not every problem is amenable to the same solution, and every framework only has a limited lifespan before a fundamentally new approach must be found. If a creative solution is needed, then a fresh team is almost certainly needed, with as much diversity as possible. Diverse groups of individuals may go through an uncomfortable phase as they struggle to find ways to work together, but this is also the way to make sure that we consider the widest possible spectrum of approaches before settling on a solution. So think about your need for creativity and choose your team accordingly.

- ◆ Not every project team that has worked together before wants to work together again. If the earlier project has strained relationships then you may be better off not burdening your project with this emotional legacy. Don't assume that all previous experience is positive.

### ► Gaining and maintaining authority

One of the stressful parts of becoming a project manager is often the idea that you will somehow have to establish authority over people who have hitherto been your peers. 'Won't it be obvious that I know less than everyone else about most of the aspects of the work? Won't they see through me?' Many successful project managers admit that they started with just the same fears. It did not stop them doing a good job.

The good news is that most people will be on your side. Your team want you to succeed because that means project success, which is good for them as well. Most people do not expect you to be an expert in their domain as well as yours – after all they would probably not have been brought into the team unless they had some specialist skills. Furthermore, the firm also wants you to succeed and will give support and guidance if you ask for it. Your position as a manager gives you a natural source of authority. The simple fact that you are the manager predisposes people to fulfil your requests – you have the weight of convention and organizational protocol behind you. Even friends can usually respond appropriately and professionally when you move into the project manager role as long as you do not give out mixed signals when in the professional setting.

The authority that comes from your position as project manager is called legitimate power. There are other sources of power that you may also have:

- ◆ **Reward power:** the capacity to grant a reward that someone wants.
- ◆ **Expert power:** specialist knowledge that means your opinion carries weight. The importance of expert power varies, but it is hard to get taken seriously in some technical domains without some technical knowledge, and in extreme cases members of some professions refuse to be managed by anyone who is not themselves a member.
- ◆ **Referent power:** the power of your personal network. If you are the son or daughter of the chief executive you have considerable power in the organization even though you may hold a junior post. By all means use your network to help your project but beware of using this power in ways that harm others or allow you to short-cut the normal channels. You do not want to acquire the reputation that goes with excessive use of referent power.
- ◆ **Coercive power:** in some ways the reverse of reward power – it is the capacity to inflict some unwanted outcome on someone who does not do as you wish. Any use of coercive power is likely to destroy whatever enthusiasm an individual may have had, even if it produces the desired action in the short term.

You can either build on your initial advantages, or destroy them. Common sense usually makes the difference between these two outcomes.

Do	Don't
<ul style="list-style-type: none"> <li>◆ Treat everyone as adults. Tell them what needs to be done and why, and let them get on with it.</li> <li>◆ Ask for people's opinions about their area and listen to the answer.</li> <li>◆ Praise good work publicly.</li> <li>◆ Share information about things within and beyond the project.</li> <li>◆ Remember that making people ask for your signature or give you an account of how they spent their time reminds them who is boss.</li> <li>◆ Ask people to do things in just the same way you would normally – politely and professionally.</li> <li>◆ Refer to and be seen with the senior people with whom you have to deal.</li> <li>◆ Respond to bad news by looking for a solution, not a culprit.</li> </ul>	<ul style="list-style-type: none"> <li>◆ Take credit for anyone else's work.</li> <li>◆ Give the impression that you don't trust people by not accepting the professional opinion of people who know more about the area than you.</li> <li>◆ Attack or insult anyone on the team, even if you feel angry about something.</li> <li>◆ Attempt to win favour with the team by breaking confidences with others in the firm. (Can the team then trust you?)</li> <li>◆ Bark orders like a drill sergeant. If you let your fear drive you to this, people might even not take you seriously.</li> <li>◆ Refuse to get involved with group social activities – you will be seen as aloof.</li> <li>◆ Shoot the messenger.</li> <li>◆ Use coercive power (not even if they deserve it).</li> </ul>

These dos and don'ts are pretty much the same as they would be for any group management function. What is different in project management is that you might have to become very skilled at these basics because new projects, with new teams, will come along far more frequently than they would if you were in a line management position.

Another way that project management differs from line management is that project management involves more uncertainty about what to do and how to do it. Projects, by their nature, involve doing things in new ways and some part of the work is likely to go beyond established procedure. The team looks to the project manager to give guidance and set direction under these circumstances, and if they get the impression that you are vague and confused, you will begin to lose credibility. But be wary of being decisive merely for appearance's sake since this can be equally damaging to your credibility. Your best defence against this is the project plan. If you have thought through all the issues, considered all the possible approaches and planned the project in a way that gives the best balance of risks and progress, then you will already know most of the answers. Refer back to the plan, remind yourself why it was set up this way, and give a clear answer. Project managers who try to work without making or referring to a plan lose credibility with their teams not because the teams pay direct attention to the plan itself, but because the manager appears indecisive and keeps contradicting earlier decisions.



### Common sense

Everybody makes mistakes – even you. Sometimes you can recover the situation before anyone notices, but sometimes somebody will realize that they are having to work harder because of a mistake you made. Some people never ever admit that something was their fault, even if it is obvious, and some go so far as to intimidate anyone who dares to point it out or to suggest another way that is clearly better. If you behave this way you will achieve two things: you will eventually erode the morale of your team, starting with the most intelligent, and you will ensure that no ideas other than your own get implemented. Since nobody can challenge these ideas of yours the bad ones will not be filtered out, and your project will suffer.

If you suspect that this description might apply to you – or more importantly, that your team believes that it applies to you, it is in your interests to change your behaviour. The change is easy: all you have to do is to admit that you are wrong once in a while. Try it. You will find that instead of losing respect you gain it, by showing that you are mature enough to take responsibility for your own actions. This does not mean you have to fawn constantly, just that you should not hide behind your managerial power. If you have made a mistake you might even find it easier to get people to help you out by apologizing and asking for their support than by announcing the extra workload and leaving them to deduce the reasons themselves.

### ► Work styles

Isn't it amazing that some people get any work done at all, considering how much time they spend chatting? If you know someone who is like that, ask yourself whether they have ever produced answers to questions faster than you could have done, just by knowing who to ask instead of trying to generate the answer themselves. If, instead, you are yourself someone who always finds the answer through your network, maybe you secretly admire or despise those people who try to work everything out for themselves instead of making use of perfectly good pre-existing information. The point of all this is that different people have different operating styles (see Fig. 3.1). You are much more likely to have to deal with different styles in cross-functional project management than if you stay within your own domain as different domains attract different sorts of people.

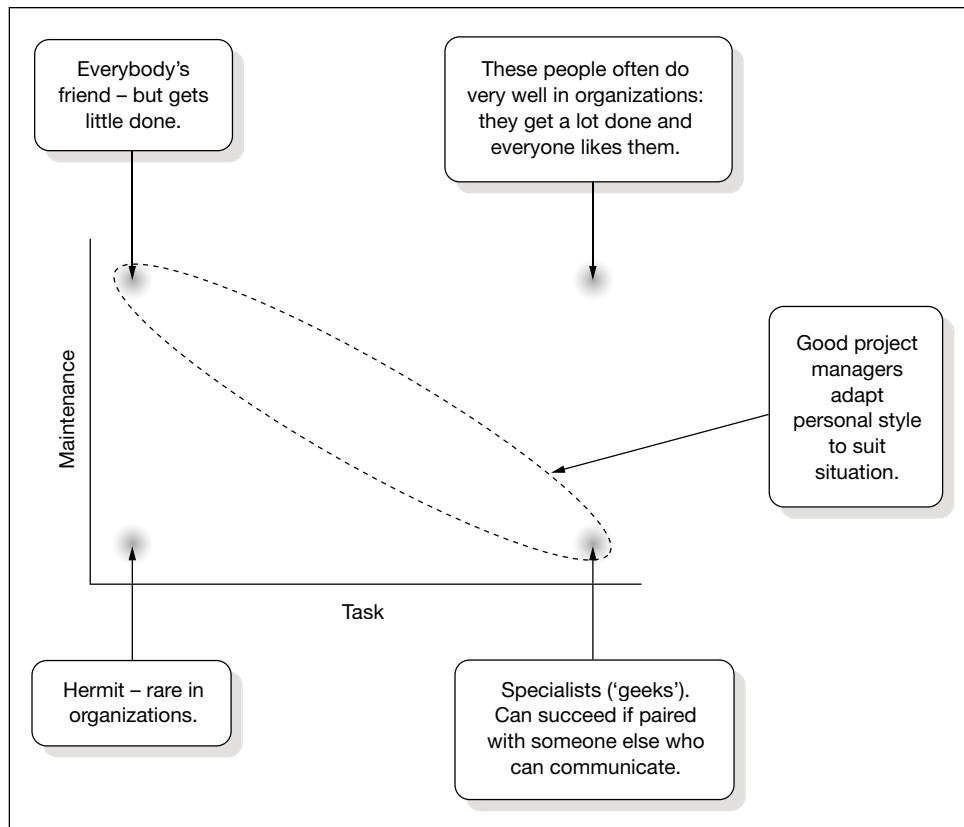
There are many theories about personalities and people's preferred team roles but it is sufficient here to point out that these differences are real and can bring down the unwary project manager. Do not assume that everyone works in the same way that you do, and manage the working styles in your team actively. That means choosing the right mix of people and adapting your own style to suit circumstances.

One way to think of the working style problem is that there are two ways people can spend work time together: they can either be businesslike, with a focus on getting the job done ('task oriented'), or they can focus on the person in front of them and deal with the human issues ('maintenance oriented'). In the course of a normal day, or even a single conversation, most people spend part of their time in task and part in maintenance. Maintenance time is the glue that holds groups of people together as a coherent group. By investing time and energy in authentic

conversations that touch areas of life outside the immediate task, the bonds that tie the group together are maintained. So as a project manager with a newly formed group, you should expect to have to invest time and energy (maybe even deliberately chosen time outside work hours, as a signal of your commitment to the human side) to get the team together. Once people feel good spending time together it becomes easier for them to talk about task problems and interact effectively without worrying too much about what other people think. Suggestions for improvements are easier to make to friends than to strangers. Some maintenance time after a gruelling period in the run-up to a project deadline is well spent, and will keep the team working for the rest of the project.

Everyone has a natural predisposition towards either task or maintenance activities. In extreme examples, some people are so wrapped up in their work that they don't seem to notice anyone else around them, and others are so warm and chatty that they really do get nothing done. Teams made up of a range of people work best if there is a balanced range of predispositions, and everybody can do a bit of both. When you are thinking about the balance in your team do not be afraid to bring in someone you know is maintenance oriented if it will bring balance to a team of task-focused people. A single task-focused person can do much to bring closure and get some momentum going in a group of otherwise maintenance-oriented people.

**Fig. 3.1 Personal styles**



As project manager, your special responsibility is to fill the gaps between the working styles of the team members and adapt your style to match circumstances. When the deadline is looming, you must have built up enough of a reserve of goodwill through your previous behaviour that you can behave in a directive manner, giving orders with little explanation if necessary. Judge when it is safe to have some fun together and when the team has really got to get down to some hard work, then set an appropriate example.



### Common sense

It is good for team spirit to spend time together socializing. Knowing this, the obvious thing to do is to go out for a drink together after work. This is just what friends do together, and everyone will work better together as a result. But don't expect it to be good for everyone. Some people just don't like it: maybe they have family commitments, or they just don't enjoy going to the sorts of places that you enjoy. Sometimes pressing everyone to come along may be counterproductive: nobody can be ordered to have fun. If there are people who are clearly uncomfortable with the suggested outing, it is pointless to insist. Next time, choose a different time or event, and if you must, just make sure that these people get included in group events during work hours.

### ► Morale

People do good work because they want to. It might give them a sense of achievement directly or they might feel good about doing their bit for the team. People will go to great lengths if positively motivated but if demotivation sets in, your project could be in serious trouble. If you have ever felt demotivated yourself, you will know that deadlines just don't seem to matter and benefits lost to the firm aren't even worth a shrug. Only a personal appeal from a friend can get you to do anything when you feel like this, and this is one of the key issues with motivation: it usually has little to do with threats and rewards, and lots to do with relationships. Threatening or coercing someone can only ever get compliance, not enthusiasm, and will make future motivation harder because relationships will be harmed. Even offering rewards does not always help. Rewards can get people to change their behaviour if they care about the reward, but this also means that people concentrate more on ticking all the boxes they need to claim the reward rather than on delivering the underlying product or service.

Experience shows that the things that build motivation are different from the things that can destroy it. Top of the list of factors that build motivation are a sense of achievement, recognition, work that is in itself satisfying, a sense of responsibility, and the chance of advancement. Top of the factors that destroy motivation are irrational policies and administrative procedures, and excessively close supervision that implies a lack of trust.

So the best way of managing motivation is by using the same basic personal communication tools you use for everything else.

- ◆ Build your relationship with the person as well as the job function.
- ◆ Use common sense when deciding the necessary level of project documentation, and make sure that everyone understands why this is necessary.

- ◆ Let people know that you notice good work and extra effort.
- ◆ Make sure that people understand why their task is important.
- ◆ Show that you trust and rely on the person.
- ◆ Protect team members from demoralizing uncertainty over the project direction or justification.



### Common sense

Both enthusiasm and despair are infectious. A radiantly enthusiastic project manager can energize the team, making everybody's tasks seem easier and more enjoyable. But if you are despairing be aware that the team will be guided by your attitude. This does not mean that you should ever conceal what is happening: it is essential that everyone on the team understands the facts of the situation so that their own project decisions reflect reality. But it does mean that despondency on your part will be amplified through the team, and will make problems worse.

### ► Supervision

The project manager's responsibility to maintain the balance of the time/cost/performance tradeoff means that project activities must be supervised. You need to know that the deliverables are on track, and you need to intervene if you believe that there is a problem. This amounts to little more than a re-statement of the project manager job title, so why spend time on it here? As is often the case, the principle is easy, but the practical implementation needs care.

Most project managers develop a personal system for supervising activities. Some take a formal approach with a lot of scheduled reporting and others practise what is called 'management by walking around' – that is, just making a tour of the desks of the project team, chatting about whatever they are doing, and following your instinct about who to talk to next. Either approach is potentially viable, but each can be dangerous if they are applied without being adapted to suit individual team members. Some people need more supervision than others, and applying the same process to everyone risks annoying the senior people while leaving the junior people feeling adrift and unsure that their work is useful.

Sometimes, you may have to deal with someone who thinks that they know everything, but whose attitude in fact reveals that they do not even know how much else there is to learn. In these circumstances careful supervision is required to cover the technical gaps but this individual probably believes that supervision is not needed. Some lateral thinking can help: use the project plan to insert some extra formal quality assurance checks in a way that is less personally threatening than constantly checking up on progress. At the same time, try to pair the individual with a more senior team member so that they can share tasks. This way, day-to-day supervision is delegated.

It is a basic instinct to want to check up on everything as a deadline approaches, just to make sure that it is all going to be alright. This is an excellent habit for a project manager to get into. But don't take it too far. There comes a point when everyone knows what has got to be done, all the inputs are available, and all that



remains is to do the work; going round and checking again actually slows things down. The best thing you can do at this stage is simply to clear all the minor obstacles out of the way of the people who will do the work, and let them get on with it. If the person responsible for the last-but-one critical chain activity has to leave the office to get their car serviced, then your best action is not to check their work again, but to offer to take care of the car while they stay and get on with the work!



### **Common sense**

One of the reasons that project management can be stressful is the uncomfortable feeling that you will be held responsible for other people's mistakes. You are the manager and you are responsible for delivering the project, and the buck stops with you. If someone on your team lets you down then it is still your problem, even though you did everything possible to help that person succeed. A project manager who publicly blames a team member for the delay in delivery looks foolish, so you end up taking the blame yourself.

To some extent, this tension is a fact of life for any manager and you will have to live with it. But do not ruin your life by letting yourself feel responsible for every mistake that happens. If you have really delegated responsibility and authority together, then the person to whom the task was delegated must accept responsibility for the task outcome. If you suspect that an individual has not fully understood that their actions have a direct impact on the customer, then let the person talk to the customer directly and experience the reaction at first hand. In the same way that a good project manager should never take the credit for somebody else's good work, you should find a way to allow team members to feel the negative consequences of their actions as well.