Project Leadership – What's Your Style?

Meeting Organizer: Patricia Sheppard

Moderator: Karon McCollin

Panel Members:

Robert (Bob) Casey: IS&T-Administrative Systems (Fin, EHS, Sourcing and Facilities) - Consulting Business Systems Analyst. Support for all areas in MIT that use financial applications. He has been at MIT for thirteen years. He had left for 6 years and then came back to MIT.

Jeanne Chiang: IS&T-Educational Systems, Team Lead, Requirement Analysis and Outreach. She works in the Learning Management Applications Group and does development support for Stellar. This is her fourth year at MIT and she has a lot of experience in Training and Outreach.

Sandy: IS&T-Consultant. She has been an MIT consultant for 7 years. Now a co-manager on a project with Kyra – primarily an SAP Manager, but has some other projects here at MIT.

Zahida Taher: IS&T-Educational Systems, IT Project Manager. She has been at MIT for four years and her past jobs have been consulting jobs for about 10 years.

Douglas Walsh: IS&T Administrative Systems, Manager, Project Management. He has been at MIT for one year and he has about ten years of experience as an IS&T Manager.

Note Taker: Elaine Aufiero

Background: Regardless of what type of project leader you are, or how much experience you may have, there are many different recipes people use to initiate and plan project work. The Community of Prctice invited staff to come and hear more about individual approaches and styles as we host a panel of staff from IS&T and partner departments who shared their experiences.

We also included a short survey so that participants could get a feel for what their own leadership style might be: http://www.surveygizmo.com/s3/1074223/The-Cosmo-Quiz-on-Project-Leadership-What-s-Your-Style

Meeting Participants:

Dennis Baron
Alison Bell
Steve Buckley
Charles Buono
Benjamin Cole
Anne Denna
Veronica DuLong
Christine Fitzgerald

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Justin Fleming
Kristen Hann
Jonathan Hunt
Barbara Johnson
Lisa Jones-Brinkley
Felicia Leung
Kenneth Lloyd
Michelle Manchenton
Cecilia Marra
Monica Menlibai
David Millar
Kevin Mullins
Frank Quern
Lisa Robinson
Keyur Patel
Alex Prengel
Jeffrey Schiller
David Segaloff
Lianne Shields
Janet Sparks
David Tanner
Oliver Thomas
Albert Wang
Lucia Ma (Eping Wei)
Jonathon Weiss
Mark Wiklund
Monique Yeaton

Question: How many of you have Project Manager in your job title? About four or five people raised their hands. About five people said they manage projects.

Karon reviewed the list of prepared questions. The goal was to get discussions going, not to get all the questions answered. We wanted to have discussions and learn from one another.

<u>When you first begin a project…..</u>

- **What do you have a tendency to do first?**
- **What are different ways you identify and engage stakeholders? What's your secret?**
- **How much collaboration and interaction with customers and team members is the right amount in the beginning of a project?**
- **How do you manage creating a project scope?**

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- **Do you have Kick-off Meetings? When are they appropriate?**
- **How important are analyzing risks at the start of a project? Is there a situation you could share where risks got the better of the project? What would you have done differently?**
- **How strong is the urge to jump in and solve the problem as opposed to planning? How action oriented do you like to be?**

The topic was focused on planning and initiation, so responses to questions are for the planning phase. Below is a summary of the panel discussion:

What do you have a tendency to do first?

Sandy: For any project you are managing, you should go and meet individually with every single team member for 30-60 minutes in order to get to know them. This will allow you to find out:

- How much they know about the project.
- Did they want to work on this project?
- Or did they volunteer?
- How can they impact the project?

They can be dedicated to the project, but they might have six other projects to work on. You may find out things are going on in their lives that may or may not impact the project. It helps to get their view and how they will participate in the project. This is very important. Projects are a group of tasks, but what makes a project successful is the team and until you get to know the team and start working with the team, then it really is not a project yet.

Bob: I do just about everything Sandy does. You need to understand the team members personalities, so you get a sense of who will work well with others and who will not.

Sandy: During these meetings, you also may find out they have additional skills that they were not slated to work on this project, so that can be helpful to know about the additional skills.

Question: Does anyone do anything different to start a project?

Jonathan Hunt: Go talk to the stakeholders and find out how they want the project to go. Tell them here are the people and resources you need and then you have to go negotiate for these things. Sometimes at the beginning of a project, you do not have all the resources you need, so you have to get some background and history, so I have a better idea of what the project is.

Zahida: When you start a project at the beginning you don't always have a whole team that you need. So it is good to see what sponsors want out of the project, because they might want something different from the stakeholders. Talking to people is very important.

Jeanne: Regarding our projects, any time we have a new component to refresh and update, we will look for resources. You want to make sure people and requirements are still fresh and relevant. Sometimes you need to go back to the original stakeholders and sometimes you have to get new stakeholders. You will need to do an outreach to these people.

Question: How do you identify your stakeholders? Like for example, when do you identify when is the right time to speak to stakeholders again?

Jeanne: We are working on a Gradebook Module, so during our data and piloting phase we recruited some other people for feedback. Sometimes you need the existing piloters, but sometimes you need other people from other departments to participate because they have different needs. Sometimes there is no set plan to use other people, but just having knowledge, like have been supporting a certain application or tool makes these people good contributors. We meet with a lot of people, like Department Heads and we have ongoing conversations with them.

What are different ways you identity and engage stakeholders? What's your secret?

Zahida: I had a project with the Marine Core about how to improve communication. We had break out groups, but we found it was difficult to deal with the hierarchy because they did not really talk with one another. We got very little response and it was difficult to get them to talk to one another. So we set ground rules and said leave the title at the door and feel free to speak up. So we tried to group people with the same rank together so they could express their opinion amongst their peers. You need to talk about what are the goals of the project. Then we tried paraphrasing and they did not like that. They would say, "That is not what I said." We summarize what people say, but depending on certain stakeholders, you can't always do that. In those sessions, it was all about "We". We said this, we want this, and we did this. It was not a learning curve for them as much as it was for us. It is important to know who you are working with. You can have all the ground rules you want, but if you don't know or understand the group, then it might not work. It is interesting to see this kind of thing happen.

Jeanne: Another way to reach out to stakeholders is we had Round Table Meetings, held focus groups, we also do 2nd and 3rd tier support, so the RT is always open for future requests or troubleshooting. MIT does <u>not</u> have a shortage of stakeholders that are "shy". So we know we will probably get good feedback from the MIT stakeholders.

Sandy: I don't think other than MIT, that there is a job with a title of "stakeholders". One type of stakeholder is over zealous and those are the ones you have to guide or they will bring too much to the scope of the job. Then there are stakeholders that don't know how to be supportive. You need to let them know what the stakeholder expectations should generally be.

Bob: It can be a double edged sword, because you don't want to have to hunt them out, but you don't want someone coming at you every day either.

Question: You will always find new stakeholder groups and at what point is it appropriate for me to engage with them?

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Zahida: First you meet with the managers, then financial people and then as you move through the project, you will start dealing with the day to day people doing the work. Then you meet with the stakeholders and they will ask, "Are you meeting the timeline as planned? Are you getting things done? You will come across challenges with stakeholders.

We did a project that included a third party (nursing home, etc.). They signed up to be part of the financial project. We were changing the guts of this manufacturing company and we did not have access to the other group that had signed up to be part of the project. We were going from a paper to an electronic system. We did not know if they were doing the coding correctly. You make your best effort and at the end of the day it is good enough or you have to do some additional work.

Sandy: If you think of the project sponsors – in reality all of your project group members are the project sponsors.

Bob: You have to break them up. You will not get an employee to say negative things about their managers. If you think their statements are right, you need to speak to the sponsor and say this person is doing the job and knows more than you do about the details, but you need to say it nicely.

Jonathan Hunt: It was very helpful when talking with and identifying the stakeholders. It is good to ask the stakeholder(s), "Who else should I be talking to?" You need to get information about who to be networking with. Contacting others can also be very helpful information.

Bob: You will not be able to identify all of your stakeholders at the front of your project. As time goes on, you will figure out you will need to speak to additional stakeholders, so you are constantly looking and identifying people you need to talk with.

Doug: You do as much as you can in the planning phase on who are your sponsors and as you uncover things, you will identify more of them. If you have the opportunity to do some planning then you should identify the sponsors prior to the Kick-off Meeting. Then you will tend to have a better project execution.

Zahida: You will get plenty of people telling you this is how you should do it. Here is something that I built to do this…. So you have to balance out what you do with the feedback and information. You have to get what you need and be prepared to change as things change. Otherwise, it can be overwhelming. How do you build an application when the audience changes every 4 years (i.e. students change every 4 years here at MIT). You just have to do the best you can.

Sandy: Some projects let you recognize a need for project preparation. This is the time to put together who your stakeholders are. Typically, this is the phase that gets forgotten about. You need to have the preparation time (take two days to do it for example). How many times are you given the preparation time? Not many and that is true with MIT and outside of MIT. This is a needed phase and the customer will not want to pay for this.

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It is good to do a roles and responsibilities document – identify everyone, what they will be contributing to the project, share it with them, so they understand their and others roles in the project.

Zahida: Engage them in the project and tell them how you plan to engage them. Whether it be a monthly or weekly status report. This helps them feel vested in the project.

Sandy: It helps to keep you honest also.

How much collaboration and interaction with customers and team members is the right amount in the beginning of a project?

How do you manage creating a project scope?

Doug: At the beginning of a project – first gather information and put it in a Project Charter My task of what the project scope is based on what I heard, use to comm. With team, sponsors and stakeholders, my scope is created from my project charter and I have a project charter for every project I do.

Note: Google's Definition of what a Project Charter is: In project management, a **project charter**, **project definition** or **project statement** is a statement of the scope, objectives and participants in a project. It provides a preliminary delineation of roles and responsibilities, outlines the project objectives, identifies the main stakeholders, and defines the authority of the project manager. It serves as a reference of authority for the future of the project. The terms of reference is usually part of the project charter.

A project charter is how we engage – roles, responsibilities, build foundation, have working sessions to create them, have them all sign off and be part of it, helps to get them all vested and engaged in the project. Sometimes you find many people don't want to work on a project charter, so Doug suggests writing down what you hear them say and that makes the project charter easier.

Zahida: Some people think everything they sign off on has to be perfect. They want to get everything they signed off on. Customers don't believe in 80/20 rule or 90/10 rule. I think putting something together for a scope document is important and keep in mind/have the knowledge it will probably change.

Doug: You need to know when the project begins and should end. The project charter helps to achieve that.

Question: On project scope, things are commonly added on afterwards. Do you have anything that helps you make sure the scope is pretty buttoned down?

Audience: If the customer has to give you more money and/or more time, then they have to make the decisions about this. This sets a frame around the work.

Doug: The job of a project manager's job is to listen to what the stakeholders want. It's to say, Let me understand what you are saying. Let me figure out what the impact on the project is going to be. If the project is going to be longer or more expensive, then so be it. The scope is the realities of the project. Sometimes you have to handle the change management process – you have to explain to the client, what the changes are, the changes in schedule, changes in cost, what has to be added in and explain that to the customers. When you say change control, you need to analyze the impact of the change on the project. Because sometimes the customer interprets "change control" as you saying that is something we will not do for them.

Do you have Kick-off Meetings and when are they appropriate?

Audience: Depends on the size of the project. Sometimes you can handle it with a meeting or email. It depends on the length and scope of the project. That is where the decision comes in.

Audience: I think the Kick-off Meetings are really necessary, so I don't agree. I think a Kick-off Meeting helps to identify what will get done and what the expectations are.

Audience: Some people don't have the project manager title in their role. I do manage projects, so that is when I decide whether or not to have a Kick-off Meeting.

Sandy: You need to have a Kick-off Meeting. But this does not mean the Kick-off Meeting is more important than the rest of the meetings you need to have. There are phases and you have to have a beginning and end of every phase. At the end of a phase you end it with what lessons were learned. This is just as important as many other meetings. Such as get the team together once a week or once a month. It is important to have regular Team Meetings and regular Sponsor Meetings. You have to have the time to prepare for them and you need to have an agenda for the meetings. A Kick-off Meeting is not more important than all the rest of these other meetings you need to have.

Bob: I agree, but based on each project (how big it is) – It is more important to have those defined Kick-off Meetings, especially for the large projects. You will need to have Lessons Learned Meetings. These meetings are very important information. In smaller repetitive projects – do this every quarter. Meetings tend to be smaller, less face to face communication (people tend to communicate more electronically via email). How important is the project? Get the sponsor in the room and ask when is the last time we reviewed the sign off page? Each project is different with Kick-off phase. You have to begin and end a phase and the best way to do it is with a Kick-off Meeting. Then when you are done with the phase – figure out what did and did not work.

Question: Who should be in a Kick-off Meeting?

Bob: As many people that you know will be involved in the project (include sponsors, stakeholders and team members). After that you might not want to invite everyone to each and every Kick-off Meeting. However, it may be good to invite them all, because it gives everyone a chance to see who is working on the project.

Zahida: Visions, objectives and goals – during the Kick-off Meeting have sponsors involved in these meetings. It will give you an opportunity to get buy in from the sponsors. If project has to be delivered for spring or fall – it helps you to focus, the mandate is it has to be done by the whole team. It gets the team working together to get it done on time.

Audience: Size of project, if large project, you absolutely have to have a Kick-off Meeting. For example, we are doing a year end service project – Year End Support Packs does three kickoffs:

- One with the Steering Committee - What are the changes coming? What is the timeline? Review what the resources are and that are needed.
- Second Kick-off Meeting is with the IT people. Make sure they understand what the changes and timeline are.
- Third Kick-off Meeting with the MIT community – They are the people that will be impacted by the project. The third Kick-off Meeting is a way of letting everyone know what you are doing and what changes are coming.

Bob: Every year we have important sponsors, stakeholders, users and everyone that uses the web, uses requisitions, uses Journal Vouchers, if you use SAP, then you are a stake holder in this project.This is the sixth or seventh year on an annual basis that we have done the annual service pack upgrade. This information is what really helps to get it done – we know dates, we know time frame, when you have a good project manager (like Frank Quern), they have it down to a science, so this is an example why multiple Kick-off Meetings are important to have.

Audience: Seems Kick-off Meetings are the best way to build relationships with the folks across the institute that you are working with. Also, it helps to explain the roles and responsibilities. Do you do anything to build those relationships between those individuals in those Kick-off Meetings? The better people know one another, then the better the information will flow. You are also trying to build trust with-in the group.

Sandy: Let the Project Manager facilitate the meetings, but let the team members speak up during the Kick-off Meetings.

Zahida: At the end of a Kick-off Meeting, ask what are the 10 or 15 things you want out of the project? It is important to build these documents for the project. You might not be able to do a lot a lot of it, but you might need to do multiple sessions.

Bob: You would encourage people to work together. For example, you should put two people together because further down the line in the project, those two people will be working together. The Project Manager makes introductions at the Kick-off Meeting. They make sure the individual team members are being heard. Some team members can be quiet, but that does not mean they are not knowledgeable, so you might need to pull those people up and get them to speak up.

Sandy: There might be some problems you can't fix, so it is good to get team members together for a Brainstorming Meeting to figure out how to solve a problem. This tends to help build relationships and team building.

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Question: Is there a recommended list of things you want to include in a Kick-off Meeting?

Doug: Need to have an overview of project, goals, objects and milestones.

Bob: Do name game or do introduction of the team members. You want that face recognition. You work on a lot of projects, so you don't always get the 8, 10 or 12 hours to do this.

Sandy: Also processes and procedures you want to use are important to bring up.

Zahida: Project risks, need to identify the risks, what are the next steps and assign the tasks.

How important are analyzing risks at the start of the project? Is there a situation where risks got the better of the project?

Zahida: We did a project on online grading – took grades and put them on line. We needed to figure out how to get the community and the business to accept it. What would it take for the business stakeholders to sign off on it? In low level, we rewrote those programs, we noticed at end of design, stakeholders would not do sign off, because we had to do each term a little differently – summer, fall, spring and IAP terms. That was one of the things we were not told about, even though we asked what the risks would be. We had to pilot the project for all four terms to make sure their GPA calculations, etc. are correct. You really have to think about the project, what you are delivering and what is the impact of the sign-off? Had we planned for it at the beginning, we could have done the pilot better. <u>Identifying risks is very key to project management.</u> We had to pilot the project (10,000 students, there are 1,500 faculty entering grades, etc.) The GPA calculation was the least of our problems. The problem was the business processes that the paper process had hidden. Like an Administrative Assistant may sign off for the faculty on some paper things, but electronically the faculty are the only one that can sign off on the electronic forms.

Doug: When implementing something new, at the end of the project, you want to make sure someone is assigned and on hand to handle the ongoing maintenance of the project. I don't want to have to maintain a system, after implenting it. On all projects, that someone has to maintain the tool, I clearly document that.

Audience: I do the same for project support. I identify that I am not the support person.

Bob: I handled project to implement a new modeling tool in a SAPgui project. Someone said no, the web came a really long way, we want to use the web. One project member said, "We are throwing an awful lot of data for the web to display, I don't think it will work". Low and behold, eight months later, it did not go well. It just bogged down and locked up. No matter of back end tuning, this product was not going to work for larger departments. The basic problem was the volume of data and the data set. We made some business process changes (which none were accepted).

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Audience: You are walking the a fine line when you are communicating with the sponsor, you have to make sure they understand the risks. Well it went well here, but over here, it still did not work. Sponsors will focus in on what is not working and will not appreciate what is causing the problem.

Doug: Don't just identify the risk. You have to say if this risk is realized, this is what the impact will be.

Question: If you are working on a big project, then what are the risks?

Audience: On any large project, there is usually a shortage of resources. The testers' job is to do the business thing and we are imposing on them when we ask them to get involved in testing a project.

Karon: I recently did an SAP Project. There was new technology involved, and I did not take into account how long it would take to get people up and running and up to speed, using the product. The product consultant was not able to transfer the knowledge well enough. The challenge was we had to handle a new challenge in the middle of the project. We had to work on how we were going to handle the setbacks in our project.

Another risk is there are multiple risks going on at the same time and it can impact each other's project. Sometimes other projects have to pull from your projects resources to resolve some other problems going on.

Sandy: You need to be aware of what other projects are going on.

Audience: The Pipeline Communication sent out each week is a key way to communicate this.

Sandy: There are different impacts on different resources. You can have an impact on a project, but greater impact on certain particular resources for the project.

Audience: The challenge was all of these projects were impacting each other. So sometimes there has to be a lot of massaging in terms of time lines. We were changing five different things for the same group of people, so we wanted to spread out some timelines for the projects. Even at the end when you are planning a release – whether a knowledge transfer, etc. you need to plan that out.

Timing is important especially during certain times of the year. Your project can impact other projects.

Doug: Like we have to analyze any projects being worked on during the Year End Support Packs – we have to look at that.

Audience: We mentioned how projects impact each other. You have to schedule that into the project(s). You may have a down time in a particular month (or around the holidays). You can have downtime due to impacts from other projects going on, holiday outages by staff, some things you just can't foresee or anticipate. There are always things you can't foresee, so you have to somehow build the buffer time into your project.

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Sandy: Sometimes the Senior Management will say you can work overtime. However, sometimes we are not sure the individual(s) want to work overtime. What about emergency transports? Are all of them really an emergency? You have to see who is impacted by some comments from the Senior Staff Management.

Audience: Regarding the last discussion questions. How good is IS&T in terms of resource planning?

Most departments are struggling with this.

Sandy: You have to make an attempt to plan for IT Resources. We tend not to attempt to plan time management or do formal resource management. It may not be a part of someone's job, but it is important to plan for these things.

Bob: We don't take the business into consideration enough.

Doug: We know some resources are not just project resources. They have a lot of other projects to work on.

Sandy: Cost is a big investment in the total project.

How strong is the urge to jump in and solve the problem as opposed to planning? How action oriented do you like to be?

Question: How many people here took the survey? How many people tend to be doers? How many tend to be "thinkers"?

Bob: I have a very strong tendency toward "doing". It can be hard for me to step back and be hands-off.

Doug: During the planning stage - I do not plan to jump in and solve problems during this planning phase. Instead, I will document some things brought up, so we can deal with them later on.

Jeanne: During the planning phase of the project, our team has front-end and back-end developers, so we tend to have enough resources in our group, we are lucky for this. We make sure the tasks are clearly assigned. I am better at delegating, so the work is better spread out. The tendency is to want to do as much as you can, without impacting the creativity of the other members of the group.

Question: Are there any doers or thinkers from the group?

Audience: I am wondering if you are more prone to be a doer, if you have more expertize in some tasks. Even though there are other people assigned to the tasks, sometimes it is easier for me to do some things because I know more and I have more expertize about how to get something done.

Audience: For Human Resources, I can be a doer. However, for other parts, I need to get people together and have discussions with them and get them to do things, maybe more the way I would do it. So they will use my processes and procedures.

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Audience: Trend – Often times you can be asked to lead projects because you have expertise in a subject/project.

Audience: I am hearing people talk about hands-on and hands-off styles of management. I don't like to interact with people, so I am not a Project Manager. How far do you go before you interact with people? I wait until I know as much as I can before I start talking with people.

Doug: I like to gather information, get a command of it and then have a presentation on it. You need to get input from others, but I spend a lot of time planning and getting familiar with things.

Thanks to all our participants for making this a wonderful event! If you have feedback or future suggestions, please email them to ist-cop@mit.edu