A survey of 200 Project and Portfolio Managers revealed: Four areas to improve Project Success

By Vanessa Carpenter

Interaction Designer at Marstrand Innovation

In May 2010 on LinkedIn, more than 200 project and resource managers wrote what they thought the three major problems were in trying to successfully complete a project. The answers were collected by Credability.info, then categorized, and rated in a report. The three top problems revolved around: People, Management, and Communications.

Marstrand Innovation looked into this report and considered the four areas that Project or Portfolio managers need to deal with in order to achieve project success. These are simply the who, what, when and how of a project. We examined the report made by Credability.info and came to our own conclusions about how to address the four areas of project success.

1. Four areas:

What: 26.52 % of participants felt that project leadership, unclear objectives, organization, or communication were problems. 3 specific examples of problems included:

- "Applicable project team and stakeholders are not in touch with the project plan during the course of the project."
- "No Project Champion"
- "Identifying and managing stakeholders very early in the game"

Who: 17.23 % of participants felt that the team, collaboration, resources, coordination, skills, and passion were a problem. 3 specific examples of problems included:

- "Not placing right people at the right role"
- "Key resources working on multiple projects"
- "Lack of resources"

When: 11.55 % of participants felt that planning, resources, capacity, or priorities were problems. 3 specific examples of problems included:

- "Poor time & cost estimates"
- "Delay in on-time completion due to unseen and improper time planning."
- "Availability of resources (human and otherwise)"

How: 10.42 % of participants felt that lack of transparency and motivation, personal interests or politics were problems. 3 specific examples of problems included:

- "Lack of passion"
- "Clear definition of the desired outcome - what is 'done' "
- "Inadequate team motivation"

We can see from the above that these four areas and their associated project issues are in need of improvement. In this paper, we will address each area and each example given and provide our understanding of the problem and possible ways to remove barriers to project success.

2. What:

Most people seemed to be concerned about the 'what' of the project; what is the project that we're doing? What are the objectives? Is it organized in some way? Is there a standard of communication? Before a project even begins, the "what" must be answered; the project or portfolio manager (PM) must know what the project is; there must be a clear objective and from that, the project can branch out, growing in terms of deliverables, resources assigned, deadlines and finances. The three example problem statements from the LinkedIn survey were:

- "Applicable project team and stakeholders are not in touch with the project plan during the course of the project."
- "No Project Champion"
- "Identifying and managing stakeholders very early in the game"

These are great examples of 'what' problems. Let's take the first example: "Applicable project team and stakeholders are not in touch with the project plan during the course of the project." Here we have a classic problem. The project or portfolio manager may be working hard to keep an organized, structured project plan but they are not effectively communicating the plan to the team members or stake holders. In this case, it is only the PM who understands what the 'what' of the project is.

To solve this, project objectives need to be clearly defined and communicated. The PM should create a project objective statement and make it part of the project's definition. In Marstrand Planning Intelligence (MPI) the PM can attach a file to a project; in this case it might be a text document that is the outline of the project and the project objective. Then everyone (team and stakeholders) could see at any time what the objectives are. However, having the information available doesn't necessarily mean anyone will take the time to see it. Here we can also address the issue of the project plan itself. As well as the objectives, the project plan including assigned persons, hours, equipment, and timing all need to be communicated.

So how do we make the stakeholders and team members actually view the objectives and project plan? We borrow a bit from the fantastic works of Chip and Dan Heath, in their book: *Switch*

- **Appeal to their identity:** as well informed, organized people who know their responsibilities.
- **Give them a sense of satisfaction:** they know what is expected of them and can work towards that clear goal without being confused about what they maybe should or should not do.
- **Make it easy for them:** automatically email updated objectives and project plan every Monday with a request for response; stakeholders and team members must sign off that they have reviewed the specific parts relating to them and the project objectives overall.
- **Find out who's doing it right**: Find the stakeholders or team members who are aware of the project objectives and project plan and find out what they are doing right – then make that the practice for everyone.

MPI assists this process of making it easy and giving a sense of satisfaction through our work breakdown structure and Gantt chart. It's easy to see an overview, or detailed assignments where team members or stakeholders can quickly see who is responsible for a task, how much time they have to do it, what other jobs they have to do at the same time, and if they are in danger of being overbooked. For team members, this is a great indicator of expectation: this is what you are ex-

pected to do, by this date, given that you have x amount of other jobs to do. For stakeholders, it provides an overview of everything that is happening, showing how and why the project is on or off track, budget and schedule.

3. Who:

The next area of interest was the 'who' of the project. The team, resource management, how people coordinated or collaborated, managing people's skills, and overall passion for the project were problems associated with lack of project success.

The who of the project is perhaps the most important point. Who will do the job, when will they have time do it? Do they have the right skills to do the job? Do they collaborate well with others – or do they even need to? Do they know what is expected of them and are passionate to do it?

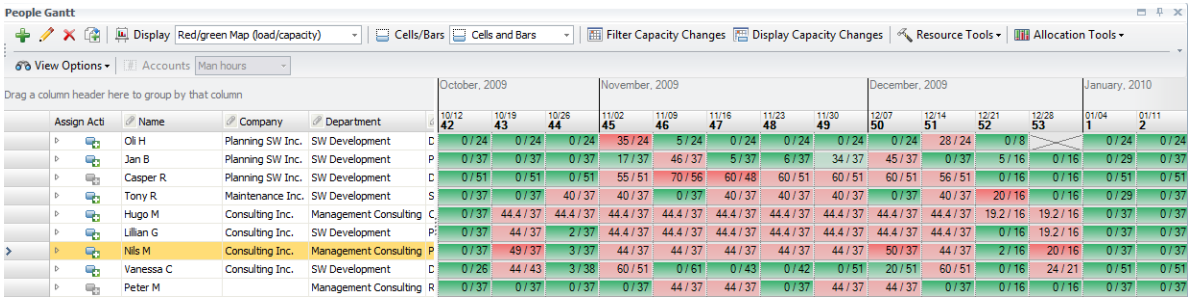
Revisiting the example statements, we see that there is a problem with resource management and awareness of skills: "Not placing right people at the right role". There is a problem with having people work on too many things at once, being overbooked or overwhelmed: "Key resources working on multiple projects" and there is a problem finding and scheduling resources altogether: "Lack of resources".

To address these issues, we have to give resource management overall, a more prominent role in project or portfolio management. Making a solid work breakdown structure and budget are only half of the equation. The best planned project cannot succeed if there is no one to do the work.

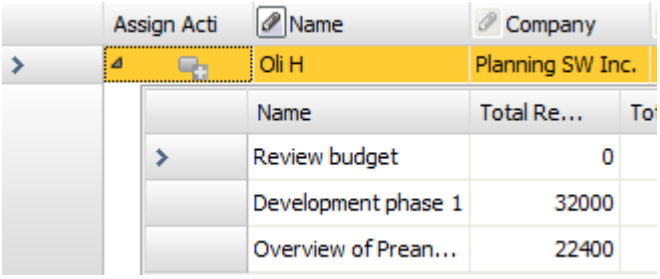
There are 3 main considerations about resources: when are they available? What else are they working on at the same time? Are they the best person for the job given the time available?

In MPI we use a Resource Manager Gantt Chart. It works much like a project Gantt chart, with moveable objects but it also gives several important features to help meet these 3 considerations:

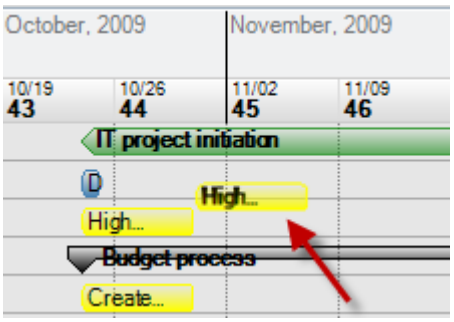
1. A red/green chart to indicate availability based on capacity. If a person is working a 40 hour week and is already booked for 30 hours and you try to schedule them for another 20 hours their cell during that time period will turn red; they are overbooked.



2. A breakdown of projects, tasks and hours. For each person, you can fold out under their name and see how many assignments they already have in a given time period and how many hours they are already committed to working. In this way you can also see the impact your assigned hours give them.



3. An interactive interface. You can easily drag and drop an assignment in time to rearrange a person's schedule so that work for multiple jobs can be better managed, and the person is not overbooked or overwhelmed.



As a PM it is important that resource management is put at the top of your priority list – if there is no one to do the job, or the person doing it can't work to his or her full potential because they are over-booked, then the project will not be a success.

4. When:

Now that you've worked out what you're doing and who's going to do, a good thing to worry about is when it will be done. The participants in the LinkedIn question were concerned with planning and priorities, stating the problems as being related to estimates: "poor time & cost estimates", as bad timing: "delay in on-time completion due to unseen and improper time planning.", and once again, as "availability of resources (human and otherwise)".

The PM must make a time schedule for all the events in a project and for the people working on the project. As discussed in the 'who' section, it's no easy task to be aware of when someone is available considering the 3 critical questions (when are they available? What else are they working on at the same time? Are they the best person for the job given the time available?). Making estimates about time, cost, or unforeseen events is also difficult, but do-able with the right mindset.

Estimates are dependent on resources. This is the golden rule. Budget, timing, tasks, all of those factors come second; first you need to estimate who is going to be free, what are their qualifications and for how long are they free to do the job. For example, we might need a programmer for a job; there are two choices, the best programmer who is busy but gets the job done well or the available programmer who takes a while and needs supervision. Your estimate completely depends on this choice. Either you bounce around the busy programmer to find a solution that works so that they are not completely overbooked or you take the second option and realize (and PLAN

FOR) that a project manager or technology manager might need to put in a few more hours to help the less-skilled programmer along the way.

The estimate should correspond with efficiency and cost of the resources. Who can get it done and what will it cost in time and money?

Finally, the estimate has to be handled correctly, review where you are – are you really 50% done?

- What risks might be involved?
- What are the unknown factors, which more complex things have popped up and made us uncertain?
- Re-evaluate where you stand currently and fix schedules, find resources, deal with overbooking.
- Deal with resources before moving to decisions.
- If you have sick people you have two choices: postpone the project or find someone else.

So it's up to the resources, and your management of them; successful estimates come from having a good overview and understanding what each of your resources is dealing with before assigning them to something new.

5. How?

Finally we come to the 'how' of the project, how will it get done – what will be the methods, the means, the standards expected? In this section, there were concerns from PMs about lack of transparency and motivation, personal interests or politics. PMs noted there was a "lack of passion" amongst their people, there was no "clear definition of the desired outcome - what is 'done' ", and there was "inadequate team motivation".

These three problems can be boiled down to one point: lack of a clear goal.

To have a clear goal you need to be clear, there should be no abstractions in the goal, no generalized terms, no stereotypical terms: "we will have an innovative project" will not help – what is innovative? What does it mean to your team? What does it mean to you, as the PM? Instead, you should focus on creating a very detailed, motivational description of where you will be when the project is complete. What will it look like? Who will be doing what? How will everyone feel? What documents will you have in hand? What will the project do? Why is it important? Finally, you should plan for milestones. Having small successes along the way makes the journey seem a bit easier, a bit more plausible to finish.

The concerns from PM's were "lack of passion" and "inadequate team motivation", very similar problems but ones that surfaced many times throughout the answers given on LinkedIn. Passion and motivation come from having a goal, having something to work towards, something that one is so intrigued by that they are dedicated to it. The key is to have this clear, definable, non-abstract, emotional goal that people respond to. They can understand the what, the who, and the when and once they have a goal, the how comes along naturally. Transparency is a given when the how is known, once everyone is on the same track and working towards the same goal transparency and knowledge sharing become second nature.

6. An example project plan:

Let's make a website.

Your company is new and needs a website. There are a lot of steps involved in this from deciding the design to figuring out what the content will be. Using the process defined above, we can break this down into segments and find the best way to do it.

6.1 What:

Well we're building a website, easy enough right? Objective? Build a website that communicates clearly and sells our product online. Notice now it's not 'just' a website – it's a website selling a product online. We learned from examining the 'what' section before that we need a clear goal, an objective that everyone knows and can work to attain. A project definition statement would be good.

"Jatak will create a website which:

- Clearly communicates to its customers the Jatak values of energy, quality and friendliness;
- Provides an easy interface to purchase Jatak's software on the site;
- Contains well written informal language and high quality images;
- Maintains the branding of Jatak in the design;
- And is completed within 3 months, and no later than August 1, 2011"

A clear work breakdown structure could be made at this point. The goal is clear: make a website with online purchase ability within 3 months. There are many steps existing within this though so perhaps its best we break it down:

Make a website for Jatak

Define project brief

- Purpose
- Functions

Hire web designer

- Initial consultation
- Project overview & discuss content
- Define pages
- Define layout

Technical

- Find hosting
- Buy domain name
- Find stock photos

Design & develop phase

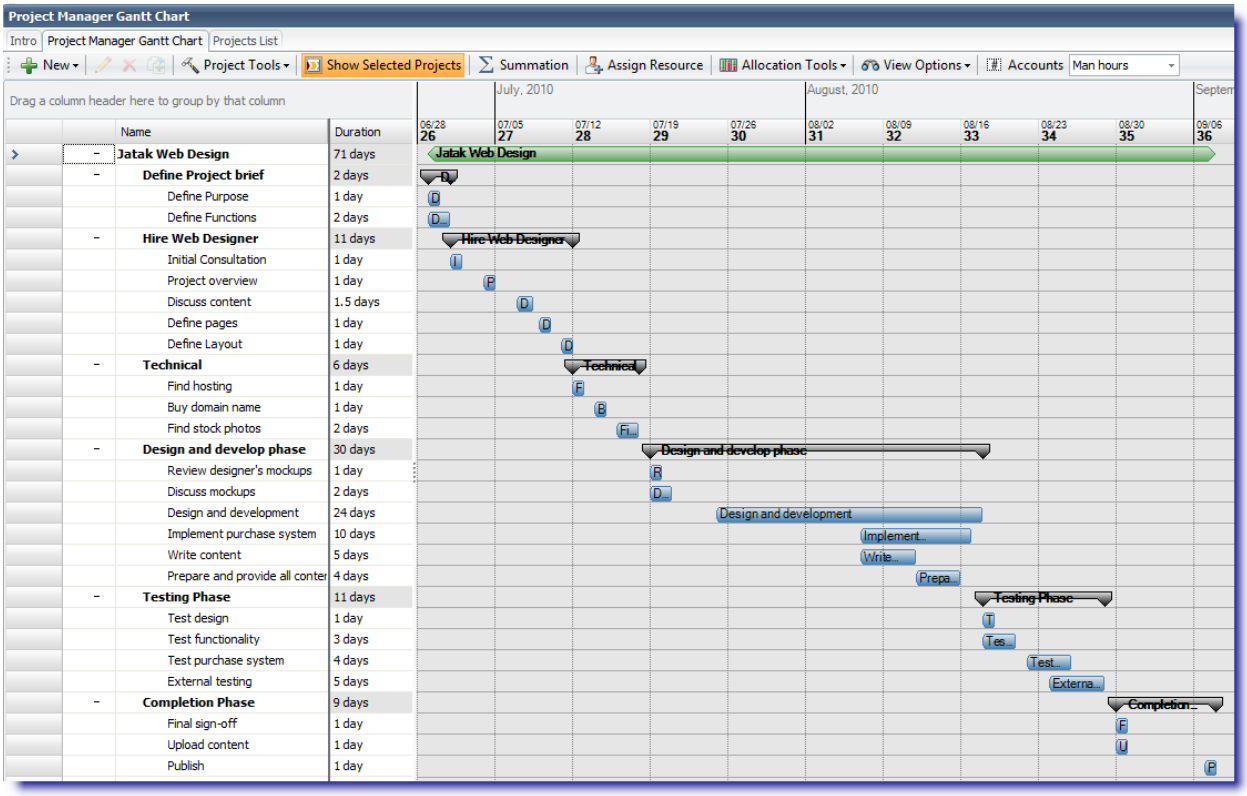
- Designer provides mock-ups
- Discuss mock-ups, choose 1
- Begin design and development
- Implement purchase system
- Write content

- Prepare and provide all documents (downloadables, contact information, photos)

Testing phase
- Test design
- Test functionality
- Test purchase system
- External testing

Completion phase
- Final signoff
- Upload content
- Publish – Go live!

There might be even more sub-tasks to these tasks but for now we'll stick with one level worth of tasks. You could also view this in a work breakdown structure with Gantt chart, such as the image below.

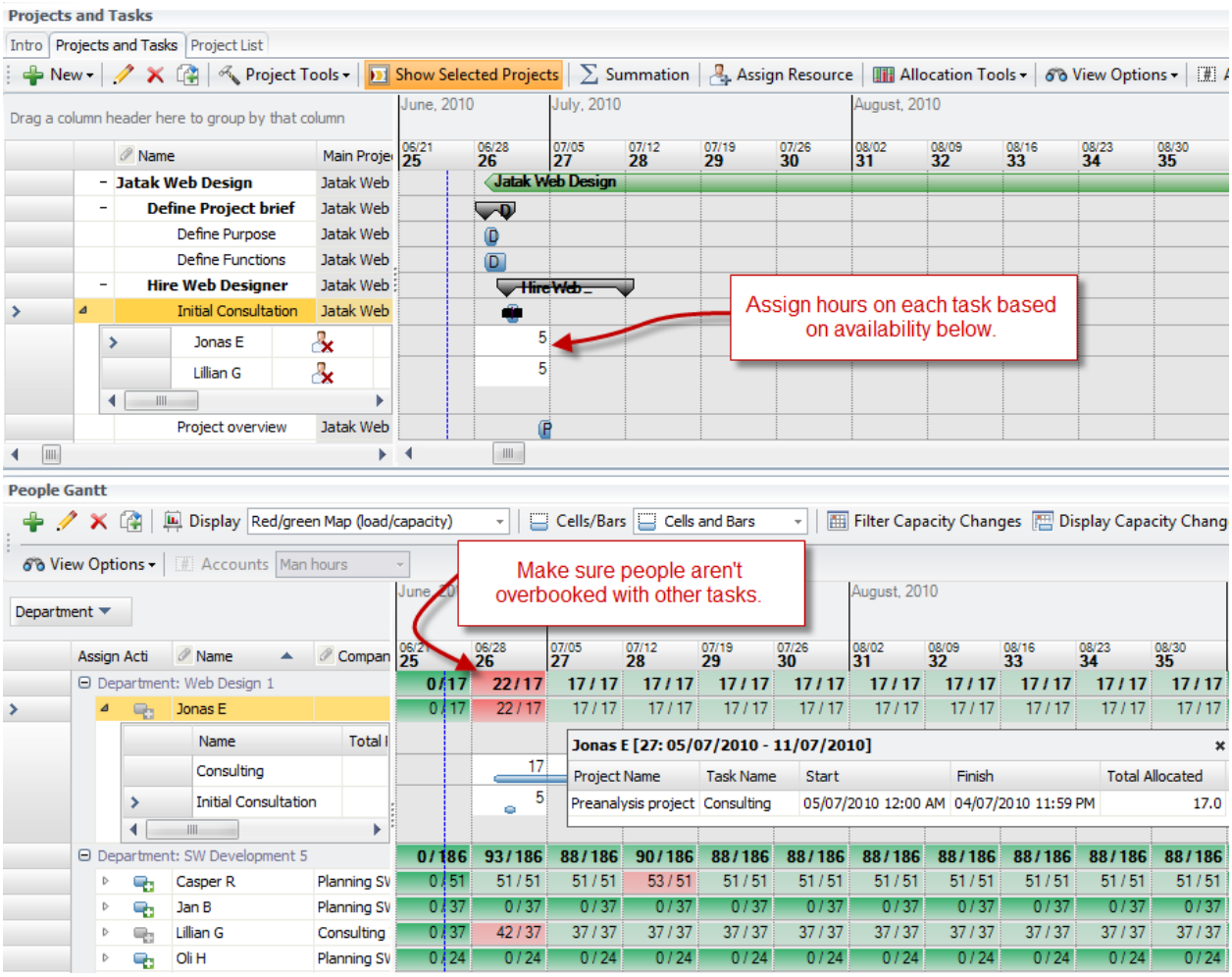


6.2 Who:

Now we're on to the people-part, who is available to work on the website? If we look at the different stages we see we need a marketing person, a manager perhaps who can select the content, a technical person who can work with the web designer to set up the hosting, and a web designer needs to be hired.

First of all, we should find out who has time. We look at everyone's schedule for each of the phases and assign based on their availability. If needed and if possible, we could also adjust their other responsibilities and assignments to fit better with the web design project.

Below you can see a Project Manager Gantt Chart above, and a Resource Manager Gantt Chart below. In MPI we use both so that we can see each phase of the project, and also what people are working on in that time period; we can then assign someone based on their available time rather than their skills alone.



By having the ability to drag and drop assignments or to change hours based on the red/green availability chart where you can instantly see if someone is overbooked, we solve two of the main problems associated with who, overbooking resources and not placing the right people in the right role. The right people can mean a lot of things whether it refers to skills for the job, ability to work with other members of a particular team or time commitments. By having an overview of all projects and resources, it's easier to make the right decision about the right person for the job.

6.3 When:

We have covered quite a bit of the "when" with the previous two sections, planning the timing of tasks and working out the availability and booking of resources. But perhaps the best place to start is with these questions:

- What risks might be involved?
  - Possible Answer: Change in scope, suddenly the website should be a CMS, and it should be an e-commerce store. Research needs to be done, analysis made, and quotes prepared to prepare the website for being on a CMS system, and for integrating it with the e-commerce system. A lot of com-

munication has to take place to make this happen. New resources might need to be assigned, resources already assigned might need to be re-scheduled.

- What are the unknown factors, which more complex things have popped up and made us uncertain?
    - As in the above point, the scope could creep. There could also be compatibility issues, designing only for Internet Explorer when most users of Jatak and thus, the target audience are actually Mac users and thus, are on Safari. Any number of unknown factors could pop up and change the scheduling and goals that we've assigned. The key is to be ready for them by calming re-arranging schedules keeping overbooking in mind, and being cautious with task rescheduling, considering others and how they are affected.
- Re-evaluate where you stand currently and fix schedules, find resources, deal with overbooking.
    - Before re-scheduling or re-assigning you'll want to evaluate where you are right now. Is most of the project complete? Who isn't really involved any longer? Maybe in this case, the graphic design is complete and so the graphic designer can be on standby rather than working full time. This maybe frees up some hours for other resources. Take a look at the red/green chart – are people overbooked? Do they have enough work? Are expectations for them clear?
- Deal with resources before moving to decisions.
    - As in the above, making sure that expectations are clear and overbooking is not an issue is paramount to having productive resources. Once these issues are cleared up then tasks and projects and deadlines can be moved around.

6.4 How:

The how comes down to having a clear goal. Our goal so far is to "make a website with online purchase ability within 3 months".

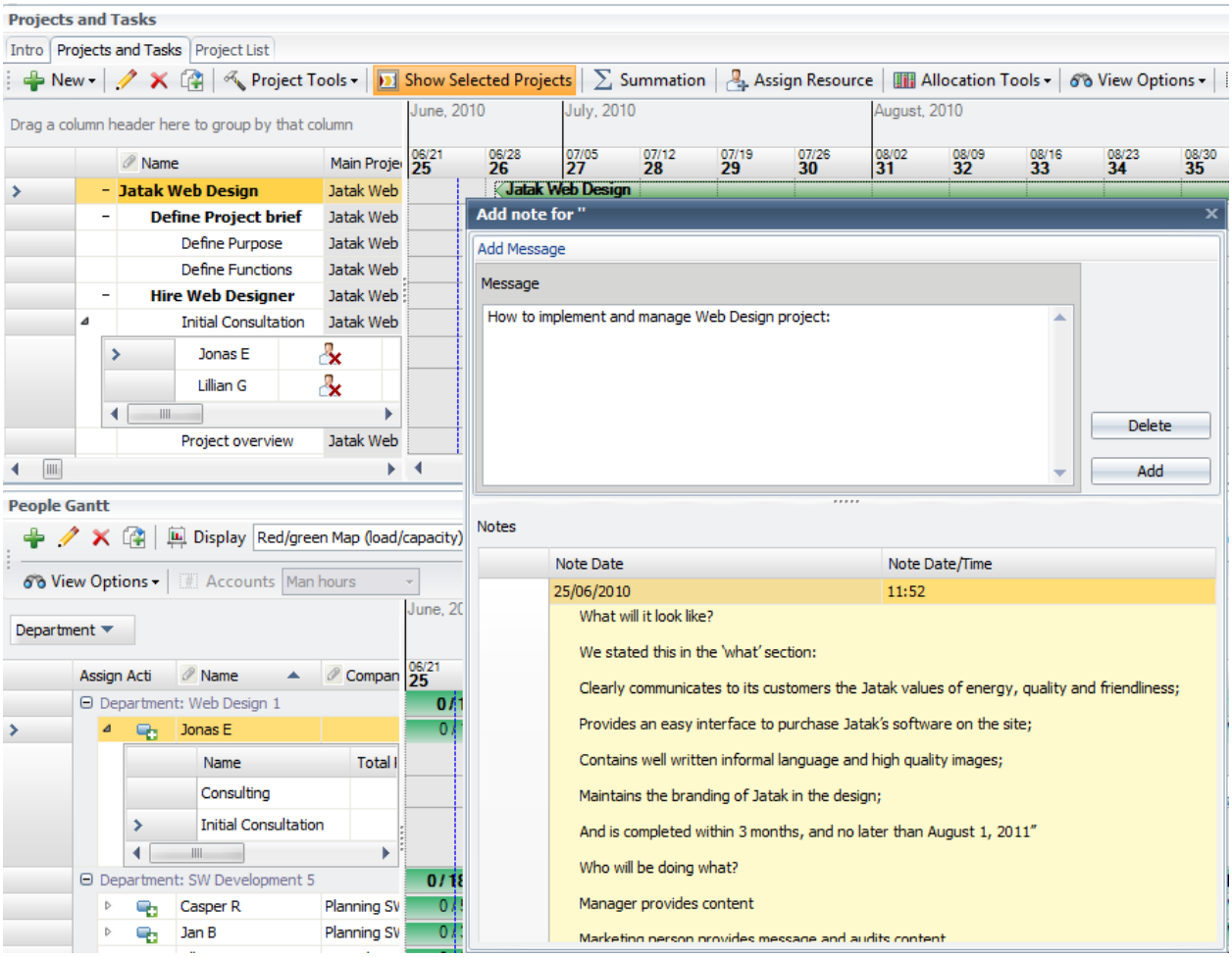
This states what, and when but not in the way we need which should included:

- **What will it look like?**
    - We stated this in the 'what' section:
        - Clearly communicates to its customers the Jatak values of energy, quality and friendliness;
        - Provides an easy interface to purchase Jatak's software on the site;
        - Contains well written informal language and high quality images;
        - Maintains the branding of Jatak in the design;
        - And is completed within 3 months, and no later than August 1, 2011"
- **Who will be doing what?**
    - Manager provides content

    - Marketing person provides message and audits content
    - Technical advisor helps to set up hosting and purchasing
    - Web designer develops wireframes, mock-ups, design, fills in content including images and then works with technical advisor to set up hosting and purchasing.
    - All four of the above test the site
    - An additional 5 people are chosen outside of this group to test the site
- **How will everyone feel?**
    - The Manager will feel like they have the right message and the right information presented on the site.
    - The Marketing person will feel confident that the message is conveyed properly and the images reflect the company's values.
    - The Technical advisor will feel that the site is set up properly and the purchasing is secure.
    - The Web designer will feel that they have a solid, functional and well-designed site and that each member of the team is pleased with the result.
    - The testers will feel that they can easily navigate the site, make a purchase and communicate with Jatak without confusion, miscommunication, or difficulty.
- **What documents will you have in hand?**
    - The website will be online and will be consistent with the print branding of Jatak.
    - The website will be accessible to everyone and provide a rich viewing experience that loads quickly and represents well the values of Jatak.
- **What will the project do?**
    - Create an informative, well communicated message leading to purchase.
- **Why is it important?**
    - Because customers want to be able to do their own research and make decisions without being pressured; on their own time for their own reasons. Jatak's website provides a pleasant experience. The creation of Jatak's website should also reflect this relaxed and friendly attitude; each member of the development team should feel ownership of the project and pride in the work they have completed.
- **What are the milestones?**
    - Each task completed will be a milestone. When the content is finished and ready to upload, that is a major milestone. When the site is complete, there will be a 'launch party' to celebrate the efforts and the newly online identity.

This is a short and demonstrative version of what the 'how' might consist of. It could easily be a text document attached to the project (see below) that gets sent to everyone and is available to everyone. It should be re-visited throughout the project, at least three times to make sure everyone is on the same page and has the same goals and good energy for the project.

MI



7. What to remember:

Over 200 Project Managers and Portfolio Managers felt that there were significant problems with the what, who, when and how of projects. The problems centered on people, management, and communication. We propose that the what, who, when and how get special attention and that you, as a project or portfolio manager, break your project into these manageable sections.

What:

- Effective and clear communication
- Appeal to the **identity** of the people working on the project
- Give them **satisfaction** – make a goal and achieve it
- Make it **easy** – small chunks of work, marked by milestones.
- Good **examples** – find out who's doing it right and use their habits to inspire new practices

Who:

- Resource Management: Knowing the **availability** and skills of your people
- **Overview**: See which projects each person has, and how that relates to the current project.
- Judgement: Is there a **better person** for the job based on availability?

MI

When:

- Estimates are **dependent on resources**.
- You need to estimate who is going to be free, what are their qualifications and for how long are they free to do the job.
- The estimate should correspond with **efficiency and cost** of the resources.
- Are you **really** 50% done?

How:

- Define **a clear goal** – no abstractions, generalizations or stereotypes
- Be **transparent**, share information, and encourage knowledge sharing
- Focus on **motivation** – what motivates people? What will drive them towards the final, clear goal?

8. All that's left

...is to get started! We're happy to answer any questions you have, send us a mail at:

info@marstrandinnovation.com.

If you would like to try out Marstrand Planning Intelligence which helps you to achieve the four goals for successful projects (what, who, when, and how) please visit http://www.marstrandinnovation.com today to try it free for 30 days.

You can also visit our online learning center here: http://marstrandinnovation.com/downloads/knowledge/learning_center/ to view videos and tutorials about project and portfolio management.

9. Thank you

Thanks to LinkedIn member Laxmi Narayan Gautam of QPI Lean Solutions in India for the fantastic response-invoking question that started it all and to http://www.credability.info/ for making the initial report. Thanks also to Chip and Dan Heath for their incredibly useful book: Switch.