SET UP TOOL #4: PROJECT TEAM COMPOSITION

Definitions of Roles:

- Senior Leaders
- Project Leader
- Project Sponsor
- Input Facilitator
- Project Documenter

Only the core team members see the project through every phase. Others are used as needed. Frequently the core team will use auxiliary members with unique talents and backgrounds in the design phase, then line managers in the impact areas in the implementation planning phase.

On a major project, the core team should be cross-functional and well educated in project methods. The core team is generally not a standing committee, so the organization may need a pool of potential core team members who are trained and ready.
THE PROJECT LEADERSHIP TEAM’S MULTIPLE ROLES

The project leadership must provide direction in these arenas:

**Project Scope** - Defining a project in terms of its outcomes and working parameters through the phases of chartering, baselining, designing, planning, implementing, and evaluating.

**Cost Control** - Maintaining effective fiscal control of the project by estimating, budgeting, monitoring, analyzing, forecasting, and reporting cost information.

**Time Management** - Appropriately allocating time to the project through the successive phases of its natural life-cycle by time estimating, time scheduling, and schedule control.

**Quality Standards** - Setting standards for performance features and characteristics of the products or services which are the subject of the project.

**Quality Assurance** - Developing a broad set of system measurements, negotiating for data collection and check points, monitoring and evaluating performance to these standards, and developing the reporting mechanism to decision makers.

**Quality Control** - Implementing a planned process for analyzing variations in report data and using the analysis as the basis for decisions on changes to strategies or systems.

**Human Resources Management** - Coordinating and directing human resources throughout the life of the project by applying the art and science of behavioral and administrative leadership to effectively use talents available.

**Communications Management** - Organizing and disseminating information by multiple means to ensure the success of the project. This includes transmitting, receiving, filtering, and interpreting information as it flows into and out of the project team.

**Participation Management** - Providing the means for candid interaction between the many constituencies, disciplines, functions, and work groups, both internal and external to the project, all of which are necessary for the success of the project.

**Contract-Procurement** - Acquiring resources (including people, plans, equipment, and materials) for the project in order to produce the end product. This may include identifying sources, selection, negotiating for commitment, conducting proposal or tender invitation and award, and planning for administration of contracts.

**Risk Management** - Identifying, analyzing, and responding to risk factors throughout the life of a project and in the best interests of project outcomes as well as the well being of the organization.

**Presentation for Decision** - Coordinating the preparation of presentations with graphic support and back up documents and facilitating the decision-making process so that the individuals in authority have the opportunity to make choices at pivotal points through the project life cycle.
PROJECT TEAM LEADERSHIP ROLES

Project Sponsor:

Any individual or group within the organization may decide to request that the senior leaders charter a project team to (re)design a product, system, or functional area. To begin the chartering procedure, the requester(s) must find a sponsor on the senior leadership team. The sponsor is a senior leader who is willing to a) assist the requester(s) with drafting a charter, b) put the charter on senior leaders’ agenda for discussion, and c) coach the requester(s) in preparation. Sponsoring implies support of the project.

If the project is officially chartered by senior leaders, the project sponsor will act as an advisor to the project team. Project sponsors are people who have been trained in the organization’s project methods and who are recognized as advocates for the system change. Prior to the first project work session, the sponsor typically meets with selected project leader(s). The purpose of this work session is to clarify the charter and review any parameters which are being placed on the exploration. During the first Project Team work session, the sponsor introduces the assigned project to the leadership team, conveying with enthusiasm the intent of the exploration and the benefits it will hopefully produce. After helping to plan the project, the primary responsibilities of a sponsor are:

- to clarify the arena for exploration for a new team.
- to help the leader gain access to resources needed to complete the assigned project, (i.e., time, equipment, information).
- to periodically review the project to be sure that it is on track and is using the organization’s project methods effectively.
- to represent the "organizational realities" of policy considerations and pervasive thinking patterns to the team in a way that informs without shutting down the team’s creativity.
- to preview the team’s work at the end of each phase BEFORE it is presented to outside audiences, and to make recommendations for revisions.
- to coach the team in negotiation skills and in presentation skills as needed to ensure the best possible reception of their plan.
- to be sure that the team stays motivated and disciplined to the task until results are achieved.
- to promote the corporate celebration of the team’s achievements.
PROJECT TEAM LEADERSHIP ROLES

Project Leader:

Every project needs one individual who can provide consistent leadership for the project, managing both the task-oriented methods of system (re)design and the human issues of team development. The project leader is responsible for the effective operation of the team and its auxiliary staff within the guidelines set out in the charter. A project leader is often someone who is brought in from another area of the organization, rather than someone with supervisory responsibility for the system under study. This ensures objectivity and enables the leader to focus on the project and the people without becoming a primary information giver. These are the major responsibilities of the project leader:

- to advise senior leaders on the selection of the most appropriate project team members for each phase of the project.
- to demonstrate leadership skills in the effective use of the project methods and techniques - specifically by maintaining a focus on customer needs, employee participation, flowcharting, and data-based problem solving.
- to schedule, make all arrangements for, and conduct effective project work sessions.
- to plan the methodological steps of each phase with concern for both the task and the management of broad participation, and then to guide the project participants through the phase effectively.
- to create an atmosphere which is non-judgmental and encourages creative expression rather than submissiveness, dependence, and "group think."
- to guide the team in designing research techniques which produce data that is both essential and valid, and to do this in a cost-effective manner.
- to keep the team motivated, disciplined to the task, and productive until results are achieved, making appropriate assignments to members and holding each accountable.
- to work with the team scribe to prepare and distribute the team work session summaries.
- to keep the team sponsor and the Quality Steering Committee informed about the team's progress and to seek help when needed.
- to work with the team scribe to prepare the team's project implementation plan for presentation to decision-makers.
- to help the team to recognize and celebrate the small achievements throughout the process that contribute to the ultimate results.
PROJECT TEAM LEADERSHIP ROLES

Project Documenter:

Each new Project Team needs a documenter who has either training in the organization's project methods or past experience in a successful project or team. The documenter has four very important functions: 1) to preserve all the work of the team on an ongoing basis, 2) to be a partner to the leader in planning the methods, 3) to produce an impressive final document which presents the team’s work and its implementation plan, and 4) to produce the report that tracks and analyzes the first cycle of data from the new system design. A characteristic common to all successful documenters is that they are good ACTIVE listeners who participate very effectively in the project. Some specific responsibilities are:

- to work with the leader as needed to plan the project methods.
- to debrief after each work session/event and capture the work in writing.
- to assist with the smooth functioning of the team, contributing to the process by observing the team roles which are or are not being played and then intentionally filling in the gaps.
- to encourage other team members to develop their ability to participate fully in the process.
- to act as a co-leader if sub-teams are formed.
- to transcribe and clean up the "wall" work of the team after each work session, taking care to clarify and capture the intent of the work without editorializing.
- to record all decisions and assignments that are made in each work session.
- to distribute all written materials needed by the team in a timely manner between sessions.
- to keep senior leaders and the sponsor informed of the project's progress and to update them on changes in staffing.
- to edit, polish, produce, and disseminate communications documents which go to outside audiences, applying a keen eye for style and clarity, while stating the case assertively.
- to produce graphics that are needed for presentations.
- to collect and integrate the data from participating input and feedback sessions.
PROJECT LEADERSHIP ROLES

Input/Feedback Facilitator/Communicator:

At various points in a project, it is essential to have input and feedback from key groups who are stakeholders in the project -- people who care about its outcome and may be personally invested in the changes proposed. Rather than increase the number of people on the team (which can make working sessions difficult to manage and lengthy), the essential exchange of ideas can be orchestrated by using group facilitators to both collect and disseminate information that is vital to the project. A pool of 5 to 10 facilitators is needed to be trained and ready. The primary responsibilities of a facilitator are:

- to attend project briefings conducted by the core project team.
- to use the established Input Session format to lead discussions with small groups and then to submit a brief summary.
- to use the flowchart method to document current practices (how work gets done now) in the system.
- to use a routine Feedback Session format to lead discussions with small groups and then to submit a brief summary.
- to assist with the development, testing, and dissemination of survey questions.
- to conduct observations and evaluation studies after a new system has been implemented.
- to represent within the team the voice of the customer, stakeholder groups, and the staff.
- to promote communication of project progress to staff at appropriate milestones.
PROJECT LEADERSHIP ROLES

Project Participant:

Every project needs core team participants who can play a variety of roles to facilitate movement of the project toward completion. Each participant comes to the core team with one or more of the following perspectives:

1. Historian: due to seniority or longevity this person brings an historical context based on what has been done in the past.
2. Expert: this person brings knowledge, skills, or experiences that are helpful to the project outcomes.
3. Creative Thinker: this participant has no specific knowledge of the topic, but is an excellent thinker and based on that, will bring an objective and fresh perspective to the project.
4. Researcher: some projects will need an individual who is highly information literate to search for and organize background information which brings the team and stakeholders up to speed in the project arena.

In addition to the above, every person brings task-oriented and team building skills to the team. Each participant's role complements that of other team members.

TASK-ORIENTED BEHAVIORS – Encourages problem-solving and goal-directed behavior. Examples:

- Initiator – Proposes solutions, suggests new ways to define the problems.
- Information Seeker – Asks for explanations, information, and facts to support conclusions and actions.
- Clarifier – Verifies information for reliability and workability.
- Summarizer – Pulls together related ideas, restates suggestions, and moves the group toward conclusions.

TEAM-ORIENTED ROLES – Focuses on the group process and encourages participation. Examples:

- Compromiser – Offers alternative plans and solutions and encourages others to do so as well.
- Gate Keeper – Facilitates other's participation. Suggests procedures and standards for group goal-setting.
- Standard Setter – Models a team style and comments on the human interaction as needed.
- Harmonizer – Reconciles any disagreements and encourages participants to explore differences of opinion.
- Stakeholder – This participant is from the system under study and can anticipate the impact of proposed changes.
SET UP TOOL # 5: RECRUITING THE TEAM MEMBERS

Following is a sample letter a sponsor might send to a department manager regarding the invitation for an individual to become a team member.

Sample

August 31, 2001

Charles Smith
Manager, Lafayette Branch

Dear Charlie:

As you may have heard, we are chartering a team on (topic). The corporate rationale is (describe), as you can see, by the attached charter, this is an important project.

To ensure the project's success, we need one person who has (specific) background. We’d like to have (name) from your staff, whom we believe have these skills. (Name) will, of course, not only add his/her expertise, but will also be developing professionally by establishing new cross-functional relationships and experience.

The team will begin on (date) and run for approximately (time frame). The team will require (name's) participation throughout the project, but his/her participation will be heaviest at the (#) phase where he will need to contribute (#) hours per week for (#) weeks from (date) to (date). I'll be glad to meet with you to discuss this need further if you wish. I need your agreement by (time/date).

Sincerely,

John Jones
Attachment: Charter