

# A “Balanced Diet” for Healthy Projects

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## Intro to Dave and Glenn

- Dave and Glenn have been working together on a very successful mission critical state project
- Dave is the PM, Glenn provided QA and PM consulting
- We've been working on how to explain why things went so well
- Concepts and a real life case study

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## A Balanced Diet?

- Your gut often tells you whether a project is healthy or not
- Source of the feeling?
  - It's the balance of many project ingredients
- Diet analogy – your project takes in many ingredients that balance one another
- Do our projects have balanced diets?

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When I talk to project managers and consultants, almost all of them say that they can tell in their gut when a project is healthy or not. The feeling is not because of an item on our typical project health check lists: executive sponsorship, communication, scope/schedule/budget, risk and issue management, team skills, etc. I think the feeling comes from how all those things and more work together in a balanced way that suits the project. So, the “balanced diet for healthy projects” is an analogy that seems to fit. In our diets, we take in lots of ingredients. Getting them in the right amounts for our particular circumstances makes a big difference on how healthy we are. Our projects might be the same way. So, let's look at some ways to assess a project diet to see if it's balanced in a healthy way.

## Five Project Nutritional Requirements

- Balanced commitment across the organization
- Balanced scope and capacity
- Balanced vendor information and commitment
- Balanced discipline and flexibility
- Balanced interpersonal relationships

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I think that a project dietary assessment should look at these five project nutritional requirements. Each requirement has ingredients that should be in balance. Our project diet needs...

## Balanced Commitment Across the Organization

- A project is about change, and change happens when there is commitment
- Commitment comes from three key sources:
  - Executives/Stakeholders
  - Business/Project Managers
  - Producers/Supporters
- Commitments from each are like the project's protein, carbohydrates, and fat (the good kind)
- Balanced commitment aligns vision, objectives, delivery, support, and risk tolerance across the sources

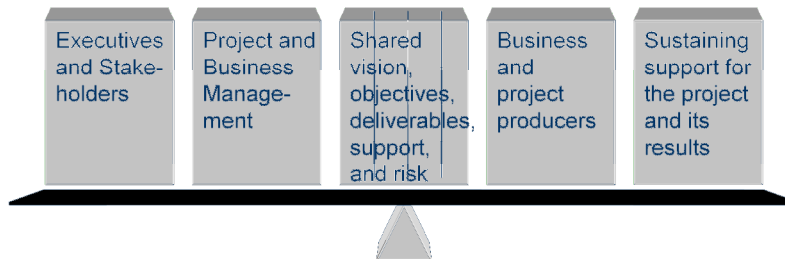
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Every project is about making changes. Making a change requires commitment. In an organization, commitment to a change comes from three key sources: executives/stakeholders, business and project managers, and producers/supporters. Commitments from these groups are so fundamental to a project, that you can think of them as the project diet's protein, carbohydrates, and fat (in a good way). Commitment happens when support is given to a vision, objectives, deliverables, or type of support needed for the project. Each constrains or expands its support based on its perception of rewards and risk, and its risk tolerance. A balanced diet of commitment happens when all three groups recognize a shared vision, objectives, deliverables, support needs, and perception and tolerance of risk.

## Balanced Commitment



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Here are the components of commitment on a teeter-totter. The groups that must commit are distributed in balance. Shared vision, objectives, deliverables, support, and risk are in the center. I've split this into four equal parts that can be aligned and shared by across the board. Like the balance of protein, carbs, and fat in our diets, each of these groups must be present and committed in complementary ways for the project's diet to be in balance. Imagine a project where each group has a different perception of the project's vision and objectives. Or, a project with all the necessary ingredients except inclusion of supporting functions like IT operations or budget tracking. Or, a project where each group has a very different tolerance for risk. Any missing ingredient, or an over abundance of one, can put the project diet out of balance. And you can tell, can't you? You can feel it in your gut.

For this project nutritional requirement and the ones to follow, make note of some examples of your own. When Dave talks about his projects shortly, look for examples there, too.

## Balanced Scope and Capacity to Deliver

- Scope includes all the business change, process and methodology change, and new technology
- The amount of each of these changes comprises the project's calorie intake
- Delivering change or project "scope" requires capacity – the organization's people, money, skills, and experiences
- Greater scope = greater uncertainty = greater risk that must be mitigated

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So we've started with proteins, carbohydrates, and fat in our healthy project diet. Now let's look at another key part of the balanced diet, calories. We need to balance calories with the capacity to burn them. On our projects, that means we need to balance scope and risk with the capacity to deliver on it. Our project has a scope that represents all the business changes, process and methodology changes, and new technologies. The total scope comprises the calories your project will consume. Scope also represents the total sources of project uncertainty or risk. Let's look at risk for a second. To address a risk, you either minimize its source, or add resources, actions or money to mitigate it. So calories come from both your scope and the amount of uncertainty or risk it generates.

## Balanced Scope and Capacity to Deliver

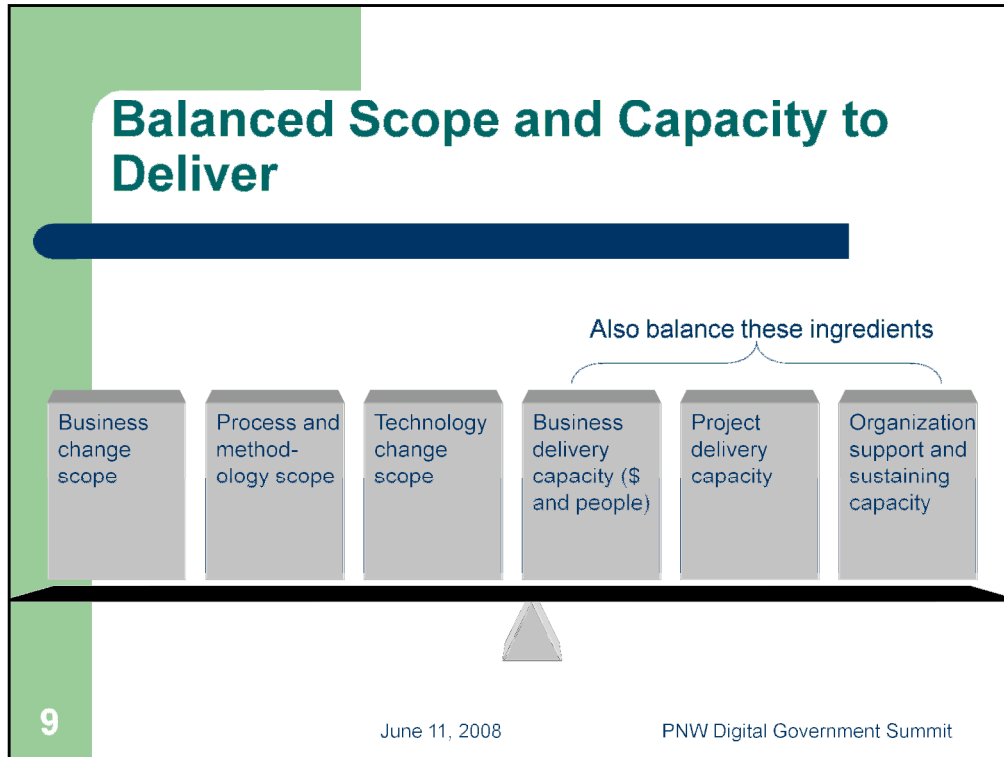
- Delivering results and mitigating risk requires matching scope with capacity
- Within capacity, business delivery, project delivery, and sustaining support must also be balanced
- Balancing these ingredients is like balancing calorie intake with your needs

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So we have calories that come from scope and risk. To consume them, you need capacity - people, money, skills, and experience. The greater the project scope and risk, the greater the capacity required. This isn't a particularly new concept, but let's look at the details. The parts of scope – business, process and methodology, and technology – are all independent and interacting sources of risk and change. Also, the resources needed to consume those calories comes from three areas that also need to be balanced – the business, the project, and the supporting areas.



Here are those calorie sources and burners on the teeter-totter. Imagine a project that has great ambition to apply a new methodology to a large system development. Or, a project that wants to move all the business processes in an organization on line while completely migrating all legacy systems to a new platform. We've all seen super-sized projects, haven't we. Do the calorie burning capabilities of the business, project, and support organizations always measure up to the challenge? Often they don't. The project achieves balance by managing scope, or working to build capacity. A project may choose to postpone business change until after its legacy system moves to a new platform, or it may decide to implement its new methodology on a small project before trying a large one.

Now consider the capacity side. I think that whatever you invest in building capacity should be invested in all three types of capacity to achieve a balanced project diet. What if we just create a strong project team that will bulldoze through all project challenges? How well does this support required business change or new support requirements that emerge? Probably not well. All three types of capacity will sort of self balance from the resources available to the project, and once this happens, if it wasn't anticipated, the groups together may have inadequate capacity to complete the project or sustain its results. For example, if all the investment goes into project delivery capacity, the project team will likely have to apply these resources to support business change and technology transfer for the project to be successful. A healthy project diet will nourish all three types of capacity during the project.

## Balanced Vendor Information and Commitment

- Projects often need vendors to deliver needed commitment and capacity (protein, carbs, fat, and calorie burning)
- Vendors need information on the project, you need information on the vendors before you make a commitment
- This happens incrementally from RFP to the end
- Balance is achieved by sharing information, discovering, learning, and adjusting commitment

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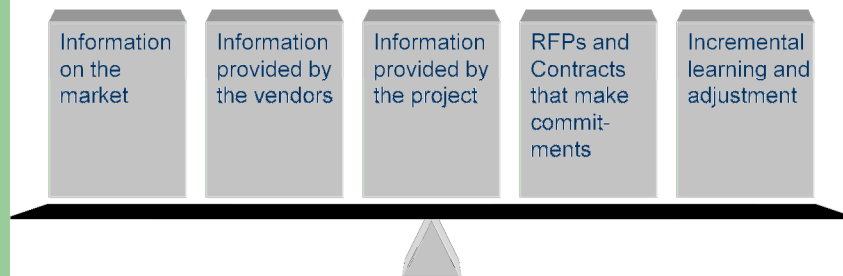
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So, we've talked about the proteins, carbohydrates, and fat your project needs in the form of shared commitments, and about how your calorie intake needs to match your calorie burning capacity. Often, to have to add vendors to your project to add capacity and support your shared commitments.

In procuring vendors, you ask the vendor to make a commitment, just like you ask all parts of your organization, to provide capacity needed to deliver the project's scope. Remember that commitment requires shared vision, objectives, deliverables, support, and risk tolerance. Commitment comes from shared information. A vendor's commitment to you, and your's to them is a result of the information you share with each other on scope, risks, and capacity. You share information during the initial procurement and make a purchase and commitment. Inevitably, you continue to learn new information as the project evolves, so you need to adjust commitments as you learn.

This can be hard. Vendors may want a long term commitment up front. You may want a long term commitment up front. But, how sure are each of you about what you are committing to? The commitment you make needs to be balanced with the information you have. The more you learn, the more you can commit. Thinking about our diet, we have to buy food. You read the labels, make a purchase, try it out, see how it works, and make adjustments as needed.

## Balanced Vendor Information and Commitment



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The teeter-totter reflects information on one side that balances contributions and needs at the start of the relationship balanced with making commitments and adjusting to new information. Imagine a project that asks the vendor to commit to the entire scope based on limited information on its scope, risk, and existing capabilities. How likely is it that the proposed capacity will help the project balance its diet? Or, imagine a project that carefully researches the marketplace, finds vendors highly likely to have the right capacity, and then creates opportunities for the relationship to zero in on just the right diet. Watch for this in Dave's project descriptions.

## Balanced Discipline and Flexibility

- Disciplined and consistent methodology and approach
  - Consistent application builds confidence, understanding, repeatability, continuous improvement, and productivity
- Scheduling that balances task and resource management
  - Resources focused in the right amount perform better than resources spread too thin
- Incremental builds and delivery
- Monitor and adjust methods and schedules

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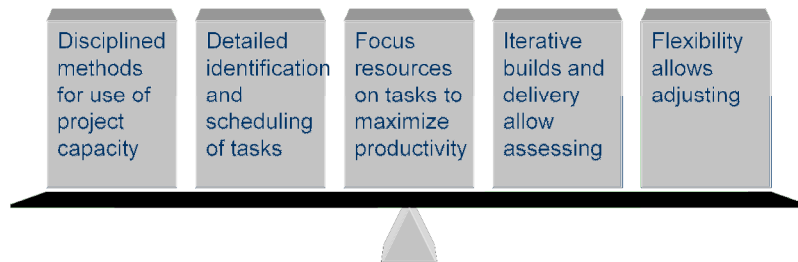
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So, now we've covered dietary building blocks, calorie consumption, and how to buy the right foods for a balanced project diet. Now we need recipes for how our diet should be consumed in a pleasing and productive way. Our recipes need to be disciplined and consistent to nourish our bodies, but also flexible to adjust how we cook and combine ingredients. On our projects, the recipes are the methods and approaches we take, and the way we schedule our work.

Adopting and applying a methodology in a consistent and disciplined way promotes learning, improvement, repeatability, productivity, and confidence. It takes the capacity we have and gets the most out of it. The same is true of scheduling. Scheduling requires us to understand all the tasks to be done and ensure that our resources cover all the tasks. Both methodologies and scheduling need to be disciplined and consistent, but to be balanced, they need to provide for incremental delivery of results and continuous adjustment as well.

Adjustments bring methods into balance with the nutrition they deliver to the project. Scheduling has its own sort of balance. It applies resources to tasks over time. You have to balance tasks with resources. Focusing too much on tasks can use resources unrealistically diminishing their productivity. Resources do best when applied to the right tasks in the right amounts at the right time.

## Balanced Discipline and Flexibility



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The teeter-totter shows how our recipes focus the commitments made and capacity provided into productive results that improve over time. Imagine a project that applies rigorous methods at the beginning but doesn't assess how they are working. How likely are they to be applied in a disciplined and consistent way throughout the project? Or, imagine a project with intensely scheduled tasks that doesn't consider whether the actual resources doing the work are fully available, committed, or have the capacity to deliver the needed results. Finally, imagine a project in such a great rush to consume great portions of scope that it can't digest each piece and appreciate what it accomplished or learned. It probably gets tired or sick from the meal.

## Balanced Interpersonal Relationships

- The right interpersonal relationships among participants generates productivity
- This is like having the right chemistry – enzymes, vitamins – in your diet
- The right relationships
  - Not too much parental or dominating behavior
  - Not too much child or passive/contrary behavior
  - Collaboration among adults includes balanced roles, responsibilities, accountability, and commitment
  - Communicate fearlessly, build trust, seek truth

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So, now we've covered dietary building blocks, calories, buying food, and recipes that help you productively deliver nutrition. There's one more nutritional essential. None of the ingredients of a balanced diet work at all without the right chemistry. The right chemistry – like vitamins, enzymes and amino acids in your body - pulls together all the other balanced ingredients. Without chemistry, the other ingredients may not work at all. In a project, the chemistry all comes down to how people work together. Do team members push and dominate, are they passive or contrary, or do they work together as collaborating adults? We want collaboration through supportive roles, clear responsibilities, and accountability for results. Collaboration is built on communicating fearlessly, building trust, and seeking truth at all times.

## Balanced Interpersonal Relationships



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Looking at our teeter totter one last time, you can see all the interrelationship qualities required to build a strong team. None can dominate, none can be missing. On one end you have the required qualities of expertise and leadership. On the other end you have willingness to follow one another and learn. Roles and responsibilities are defined, respected, and people are accountable. Adding behavior that is authentic, communicative, and truth seeking, you get trust. This leads to good collaboration and cooperation. Imagine a project with such strong focus on leadership and drive that the reality of delivering results is lost because truth is not sought, people are afraid to communicate, and accountability turns into passive resistance. Imagine a project with no collaboration or cooperation.

Good chemistry in our project diet balances strong expertise and leadership with respect for all project roles, and promotes collaboration by developing trust by seeking and acting on truth.

I'm sure you are all full to the brim with our diet of concepts. So, let's turn to Dave and have him describe the projects he has been working on and how they found a balanced diet, and lots of success.

## OIC Project (Case Study)

- Move the agency's mission critical computing needs off of an HP3000 by June 30th, 2007
- 3-years project effort – July 2004 through June 2007
- Largest IT project ever undertaken by the agency
- Limited project experience and minimal capacity
- Agency completed the project on time and under budget

## What Worked?

- Early preparation of project resources
- A different approach to vendor relationships
- A consistent and meaningful scope definition
- Go slow to go fast

## Project Setup

...before starting procurement phase

- Established clear and attainable project objectives
- Consistently adhered to project guiding principles
- Provided early opportunities for business leads to experience “project life”
- Established early confidence in the project leadership
- Increased team confidence by successfully achieving small milestones

## Verify Investment Strategy

...before releasing RFP

- Market research – working solutions, successful vendors
- Profiled vendors and solutions to determine responsive pool
- Asked vendors what they needed to produce a meaningful RFP response
- Communicated implementation strategy through RFP document

## Support the Relationship

...before undertaking complex work

- Tested capability of team and resource accordingly
- Vendor Discovery – early learning opportunity to build understanding and commitment on both sides
- Did not let vendor or state over commit – achieve small milestones first to establish credibility
- Eased into agile/iterative development to determine project velocity
- Focused on being consistently consistent

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## Monitor Relationship

...during project phases that are higher risk

- Executed work via multiple Statements of Work achieved – continuous commitments and accountability
- Balanced responsibilities between vendor and project owner – provided ability to exit
- Incorporated early “lessons learned” into subsequent complex development phases
- Built trust and capacity through early learning efforts

## Conclusion

- Discussion – How did Dave's projects have a balanced diet?
- Q and A