Leading Project Implementation

Workshop Outcomes: A Leader’s Role in Project Implementation

1. Assess your team’s performance
2. Sell the importance of your project implementation in a 3 minute “elevator pitch”
3. Assess your project’s “fit” within the implementing organization’s strategy, vision, and structure
4. Determine the changes and transitions an organization and its people must go through to implement your project
5. Set an overall plan for implementing your project, that knits your project into the fabric of the organization
6. Present your comprehensive project implementation plan

Workshop Description

- This is an intensive, 3 day workshop focused on:
  - Leading project implementation

- You will assess your team’s performance:
  - On your overall project
  - On an additional team challenge
  - On your team’s implementation plan

- You will:
  - Learn about, design and develop elements critical to successful project implementation
  - Create an overall implementation plan for your project
    - Present it to a panel of your stakeholders
    - They will provide you positive & constructive feedback
  - Determine how your team will use these plans to implement your project

Project Implementation is Hard Work

“Envisioneer?”
Future + Strategy
+ Execution
Benefits to You and Your Organization

Benefits to YOU:
- Ready to implement projects with a comprehensive plan
- Confidence in pitching the importance of your project
- Know how to assess any project’s fit within any organization

What Your Organization Gains by Your Participation:
- Better implemented projects
- A leader who creates a culture of high performing teams and projects
- A person who can drive consistent, disciplined project implementation

Elements Covered in Workshop

- You will:
  - Check in on your team’s performance
  - Create a project implementation plan
- A brief summary of elements in the workshop:
  1. A debrief of team performance
  2. Selling the importance of your project plan implementation
  3. Assessing project “fit” within an organization
  4. Leading a Project Implementation Team
  5. Use of change and transition management to drive project implementation
  6. Elements of an overall project implementation plan
  7. Designing an overall project implementation plan
  8. Pitching the implementation plan to a panel of stakeholders/sponsors

How the Program Works

- Your goal: Create an implementation plan for your project
  - You will work in your team to accomplish your plan
  - Your coach: Provides feedback on your plan & your team dynamics
- Your team will go to work immediately:
  - Today’s focus:
    - Assessing performance over this past year
    - Taking on another team challenge
    - Planning for your project implementation work over the next few days
- Wednesday-Friday: Project Implementation Elements are introduced
  - You will build your project implementation plan
  - Coaching/feedback is provided as you build your plan
- You will practice presenting aspects of your plan
- You will discuss your team’s performance daily
  - Coaches will help you check & improve your performance

Culmination/Crescendo

- Your team will pitch & defend your plan to a panel of senior experts on Friday morning
- Each of you will receive feedback & encouragement
- Your team will determine how to implement your project based upon your plan and feedback
What You Can Expect
- A program that supports you doing real work
  - We set a bar, and help coach/consult with you to achieve it
- Fast pace – intensive few days
- Focus = you & your team’s performance
- Sessions start on time
- Positive atmosphere w/ recognition
  - We are here to support each other
- Tough, constructive feedback
- An opportunity to achieve a very high standard of performance
- Networking & team building
- Fun

Expectations of You
- Engage & learn
- Recognize others
- Support your team
- Be accountable for work
- Strive to meet the performance bar
- Find the best possible ways to implement your project so that it can positively impact constituents

How Success is Measured
- Success is measured by:
  - The quality of your project implementation plan
  - Your ratings and feedback by the panel
    - Green light (ready for implementation now)
    - Yellow light (should be implemented, but needs work)
    - Red light (should not be implemented)
  - Your ability to implement the project plan in Afghanistan

Team Performance – A Quick Review and a Check on How Your Team Performed
**Teams & Projects: Engines for Org. Performance**

**Why Teams Impact Performance**

In a high performing organization:
- Teams & projects are vehicles for doing work
- They are leverage points for coordinating work across people
- The sum of team work =
  - Accomplishes strategic objectives &
  - Moves the organization to its vision

**Reality of Teams**

The Reality:
- Most teams struggle to complete their work
- Teams don’t know how to best develop themselves
- Team development – without leadership – happens, but not for good
- Team leaders and members should be proactive in designing teams for success

**What Makes a Good Team?**

**A Summary of Important Factors**

- Definition: Clear team deliverable(s)
- Clear individual deliverables
- A deliverable is tangible output, with owner, due date and defined measures for success such as time, cost, quality
- Defined leadership
- Size = 7 ±2; larger numbers should be linked subteams
- Interdependent work - team members must rely upon each other to accomplish deliverables
- The best possible members on the team (expertise, representation)
- Accountability - individual and team levels
- Agreed upon way of accomplishing the work together
- Acquires and effectively utilizes resources needed
- Stakeholder buy-in and support
- Ability to track and communicate progress
- Team Development does not equal Team Building
**Tuckman Model**

- Commissioned by the U.S. Navy Advent of nuclear subs
  - Model is descriptive (Tuckman observed hundreds of teams and described what he saw)
  - They are natural stages
  - The steps rhyme

**Tuckman Stages**

- Performing
  - Seamless
  - Synergy
  - Think of the best team you've ever seen

- Norming
  - Team learns to work through differences
  - Progress happens, but not perfectly

- Storming
  - Conflict = Healthy difference of opinion
  - Important: How team deals with conflict

- Forming
  - Team sets deliverables
  - Defines how to work together
  - Most don't do this well

**Principles:**
- Each stage builds upon the previous step
- Each stage builds towards "Performing"
- Skipping any stage negatively impacts performance
- The model is fluid, i.e. like a manual transmission car
- With every new challenge, process must be repeated

**Where to Focus to Develop Teams**

- Importance of forming well
- The ability to move the team through the stages
- Important! Handling conflict as differences of opinion in the storming phase
- Discussing team process and team results
  - Reinforcing the good
  - Fixing the bad

**Team Development**

- Reforming
  - New goal
  - New leader
  - New members

- Performing

- Norming

- Storming

- Forming

- Re-Forming
**How to Form & Move the Team through Stages**

Two types of elements form the basis of team performance:

1. **Deliverables**: What the team will produce
2. **Process**: How the team will work together to produce the deliverables

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**Define HOW the Team Works – Team Process Elements**

<table>
<thead>
<tr>
<th>Element</th>
<th>What to Do</th>
<th>If Not Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tuckman Goal</td>
<td>Set a stage goal and monitor performance</td>
<td>Members have differing expectations – some are OK norming, others want to reach performing stage</td>
</tr>
</tbody>
</table>
| 2. Member Expertise + Experience | Discuss + leverage the expertise of members                              | Don’t know each other’s expertise
  - Don’t use skills resident in team
  - Are slower than needed
  - Repeat historical mistakes
  - “Reinvent the wheel” |
| 3. Leader & Member Roles | Define leader role (facilitator, decision maker, etc.)
  - Define what it means to be a good member | Members have conflicting perspectives of leader role
  - Unclear member roles lead to issues |

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**Define Team Deliverables**

- Tangible output defined
- Alignment to Strategic Objective
- Milestones & Due Dates
- Owner
- Indicator - Measure of Success
- Headcount Needed
- Budget
- Frequency of Project Review
- Team Priority
- Current Status/Issues
- Actions Needed

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| 4. Communication | Create a plan:
  - Communicate what
  - To whom
  - How often
  - Plan for internal org. members
  - Plan for external (Customers, stakeholders, etc.) | Communication is:
  - Too much
  - Too little
  - Not with the proper individuals |
| 5. Conflict | Prepare for it
  - It may simply be difference of opinion
  - Set criteria for how idea conflicts can be resolved:
  - Data based
  - Constructive – not personal
  - Outcomes - based
  - With the best person to resolve it
  - In time | Teams personally attack each other or speak badly about one another “behind the scenes”
  - Issues are based upon opinion and are not resolved in a timely manner |
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<tr>
<td>6. Outcomes-Based Meetings</td>
<td>Set agenda to include outcomes and process</td>
<td>Lack of agenda, output and process</td>
</tr>
<tr>
<td>7. Decision Making</td>
<td>Determine how decisions will be made upfront – consensus, consultative, authoritative, or voting?</td>
<td>Lack of clarity leads to confusion and frustration</td>
</tr>
<tr>
<td>8. Rewards</td>
<td>Track contributors and reward them. Set criteria for recognition and types of rewards</td>
<td>Often overlooked, and members feel undervalued</td>
</tr>
</tbody>
</table>

### Team Development – How to Propel through the Stages - & On To Performance!

- **When Forming:**
  - Create a team performance plan
    - Task Plan
    - Team Process plan
    - Define the team's Tuckman goal
    - Discuss progress to task and team plans
- **When Storming:**
  - Remember that conflict is OK = difference of opinion
    - Discuss when it occurs
    - Keep it objective; resolve it & let everyone see it as an accomplishment
- **When Norming**
  - Continue to focus on issue resolution
  - Confirm roles and check work alignment in the team
  - Fine tune task and team process plans
  - Improve linkages to external partners
  - Strive for seamless execution to achieve performing stage

### Hill of Influence

**An Exercise to Map How Much Influence Members are Having on Team Output**

The key question: Does influence = Talk time?
Organizational Development & Performance

What is An Organization?

1. Social entity
2. Goal Directed
3. Designed as deliberately structured and coordinated activity systems
4. Linked to the external environment

(Daft, 2007)
Today's forward-looking, constituent-focused and member-friendly organizations are a recent phenomena in human history.

Why Do Organizations Exist?
- Bring together resources to achieve desired goals and outcomes
- Produce goods and services efficiently
- Facilitate innovation
- Use modern manufacturing and information technologies
- Adapt to and influence a changing environment
- Create value for owners, customers, and employees
- Accommodate ongoing challenges of diversity, ethics, and the motivation and coordination of employees

"The Modern organization is one of the most effective means to allocate resources we've ever seen. It transforms great ideas into customer/constituent benefits on an unimaginable scale"

-- Bill Gates

What is OD?
Why is OD Important?

- It is about performance!
- It is an “HR term”
- OD people are the first group cut in tough times (along with training)
- It should not be an HR activity
- This is the job of leaders in the organization

Systematic Performance - Baldrige

- **Leadership**— How senior executives lead, responsibilities to the public, good citizenship
- **Strategic planning**— Strategic directions and key action plans
- **Customer and market focus**— Expectations of, relations with, & satisfaction of constituents
- **Measurement, analysis, and knowledge management**— Management, effective use, analysis, and improvement of data and information
- **Workforce focus**— Develop org. full potential and how the workforce is aligned with objectives
- **Process management**— Production/delivery and support processes are designed, managed, and improved
- **Results**— Examines the organization’s performance and improvement in its key areas: constituent satisfaction, financial performance, human resources, supplier and partner performance, operational performance, and governance and social responsibility

Project Implementation for Organizational Performance

Project Completion – Now What?

- You’ve assessed, designed and developed your project
- Now you are at a tipping point or inflection point
  - Will it fail or succeed?
- You must continually communicate its importance
- Your role to ensure project work is implemented, and does not go to waste, is critical at this point!
- You don’t want the project to become “shelfware!”
**Project Success**

Beginning
- Need – problem statement/opportunity
- Assessment & Analysis
- Benefits & Priority
- Proposal
- Management Review Committee
- Sponsor
- Team Representation
- Benchmarking

Development
- Design & Development
- Rapid Prototyping
- Launch Prep/marketing buzz
- Involve stakeholders & managers
- Execution Excellence

Launch project
- Baby can crawl, walk, talk
- Incentives
- Evaluation & progress
- Post Mortem
- Recognition

Project Plan & Ratify

**Projects Serve Constituents**

Sponsor

Strategic Leaders
Mgmt

Structure
Culture & Values

Teams
Individuals

Output with a purpose
People Served

Metrics
measure impact

Vision

Vendors & contractors

Stakeholders

**Project Implementation Process**

1. Selling
2. Securing Sponsorship
3. Implementation Team Selection, Management, & Execution
4. Assessing “Fit” for Project in Implementing Organization
5. Ongoing Communication
6. Change and Transition Management
7. Evaluation & Measurement

**Implementation Checklist**

- See Checklist Handout
Selling the Importance of Project Implementation

Continually Selling Your Project & the Importance of its Implementation

Plan to continuously sell the importance of the project and its implementation to:

- Sponsors
- Stakeholders
- Constituents
- Senior Leadership team
- Leaders and managers within the organization
- Teams of members in the organization

To whom will you sell, and how?

Your Pitch Emphasizing the Importance of Implementation

1. Opening
2. Problem/Opportunity
3. Your Solution
4. Benefits to constituents
5. What it takes to implement
6. Specific Ask of the Stakeholder or Sponsor

Selling the Importance of Implementation

1. Opening:
   - Short or memorable phrase
   - What you and your project will do
   - Memorable
   - A tag line or branding for your project

2. Problem/Opportunity:
   - Summarize the customer pain or opportunity in one sentence
   - Give an example
   - Data used to measure it
   - Quantify it – from your needs assessment. Who is impacted, how many? Size of the opportunity
Selling the Importance of Implementation

3. Your Solution
   • Project you have designed
   • Why it is the best solution to the problem/opportunity
   • Expected results & how it will be measured

4. Benefits to constituents & how impact will be measured to a specific goal

5. What it takes to implement – and why it is critical to follow through with implementation

6. Specific “Ask” of the Stakeholder or Sponsor
   • Support in leadership team and communication
   • Invitation to leadership team meetings
   • Make a priority in deliverables for reward/accountability
   • Feedback
   • Connections, referrals

Pitch Tips

• Know your audience
• Create an emotional opening that appeals to audience
• Connect with audience
• Provide bottomline upfront, then support with data and story
• Back logical arguments with data
• Watch level of detail
• Don’t go too deeply into technology – it’s not an intelligence test
• Deliver effectively:
  - Posture, eye contact, gestures, dress, movement, voice, passion, humor
  - Use simple visuals
  - Practice questions (esp. rude ones) – use to reinforce points
  - Tie back to original objective
  - Tie back to emotion
• Have an “ask”

YOU are the Audience!

Typical Presentation

Presenting = lecturing
The slide deck IS the “presentation”
Itty bitty talking head that points to a large screen (preferably in the dark shadows)

Great Presentation

Presenter IS the presentation and forms a relationship with the audience

Zero Relationship

Bad Relationship

Healthy Relationship

Healthy Relationship greatly affects presentation outcomes & impact!

Support = a Journey

Plant the seeds

Exec-head-nodding-bobblehead-event

Customers, stakeholders, execs

Pre-Sell in 1:1s & small groups
Selling Exercise

- You are in an elevator with a sponsor or stakeholder who can make or break the implementation of your project
- Prepare a 3 minute pitch about your project, emphasizing the importance of its implementation

Securing Implementation Sponsorship

- Who is the best sponsor to ensure the project is fully implemented?
  - Note: this may not be the sponsor who originally initiated the project
  - Your original project sponsor(s) – did you have any?
  - Are they in the best position to ensure the project:
    - Is implemented successfully?
    - Has the best possible impact on serving constituents?
  - Do you have a leadership committee? Can it include opponents?

  Assess a sponsor’s ability to:
  - Take the time to meet with you
  - Assume responsibility for the project’s implementation within the org.
  - Help execute the implementation plan
  - Secure resources
  - Fend off enemies of the plan, and support the team
  - Rally those implementing the plan
  - Hold other organizational leaders & managers accountable, and reward them
  - Support you in senior leadership review committees
  - Make changes if the implementation is not going well
  - Analyze results of project impact and make subsequent decisions using the data
Team Selection and Management

- Representation – cross-functional membership
- Passion and expertise
- Hand pick
- Secure manager buy-in

- Who should be on the team for the implementation phase of the project after the UNITAR fellowship?

Consider:
- Expertise
- Experience
- Position in organization
- Passion
- Representation

Project Implementation Takes Discipline

- Discipline to Implement a Project
  - Use team development processes you have learned
  - Create a Team Plan for reward, accountability, alignment
    - Team Deliverables Plan
    - Team Process Plan
  - Individual Deliverables
    - Use a breakthrough systems approach
  - Conduct Work Reviews
- Leaders need to hold 1:1s to check individual deliverables & remove barriers
- Use Effective Meetings
- Track Action Items
- Follow up

Exercise:
Sponsor and Team Membership Check

- Who is the best sponsor for overseeing the implementation of your project after this Fellowship?
- Who should serve on a leadership committee?
- Who is the best project implementation team leader?
- Who should be members of the team? Why?

Prepare a 2 minute presentation to review these topics with this audience

Project “Fit” in the Organization
Implementing Your Project
Identifying Fit & Leverage Points

1. Vision and strategy
2. Structure
3. Culture
4. Execution excellence within existing or new processes
5. Performance management
   - Leaders, managers, team leaders, org. members
   - Organizational incentives
6. Communication
7. Measures of Success
   - Goal: Fit your project within system, or help change system as needed
     - Pilot, tryout and get quick wins

Objective: Knit your project into the fabric of the organization

Vision & Strategy Fit

- What is the vision of the implementing organization
  - What does it plan to produce in the next 3-5 years?
  - How will it serve its constituents?
- What is the current strategy?
  - Priorities for this year
  - Indicators

Questions:
- How does your project align to and serve this strategy?
- Why is your project a priority within this strategy?
- How does the project help the organization move toward the vision and strategy?
- How does measuring your project’s success link into the organization’s indicator set?

Structural Fit

- What is the structure of the implementing organization?
  - Where does your project fit in the org. chart (who would do the work)?
- Who is on the stakeholder map?
  - Where do your sponsor, stakeholders, and other advocates sit in the chart?
  - Which senior leader is responsible for the implementation?
- Which are the implementing teams?
  - Who, how many?
  - Who makes decisions about the implementation?
  - Is the project an org. priority & will there be accountability/incentives?
  - Do members of the implementing org. have skills needed?
  - Who will support them in implementation? Will their managers?
  - Is it part of their deliverables – and a priority compared to other work?
- Which other teams will the implementing teams engage?
  - Can one group implement it alone?
  - Are there cross-group dependencies?

Culture Fit

- What are the organization’s stated values?
  - How does your project align to these values?
  - Do leaders role model these values? What are their actual behaviors?
    - What do they do vs. what they say?
  - What are the observable behaviors that are rewarded in the organization?
    - Note: They may or may not be the values
  - How does the benefit your project provides to constituents align to the values?
- What are the external culture implications that impact the implementing organization?
  - Is your project ready to be implemented in the region where the organization exists and the target audience resides?
  - Can it be customized for various constituents?
**Process Fit**

- What are the primary work-flow processes in the organization (how work gets accomplished)?
  - Processes are often characterized by input, action, and output

- Which processes are ready-made to support your project implementation? Which are not? What can you do about it?

**Performance Management Fit**

- How are leaders, managers, & members rewarded & held accountable in the organization?

- Will people be held accountable for implementing your project?
  - Will they be rewarded?

- Specifically, how will the following individuals be rewarded and held accountable?
  - Sponsoring leader
  - Leaders of the organization – what is their role?
  - Managers of teams and individuals – what is their role?
  - Teams
  - Individuals

- Are there organizational rewards for accomplishing high priority goals?
  - Example: Employee bonus for everyone accomplishing high priority organizational goals?

**Organizational Fit Exercise**

- Prepare a 5 minute presentation, summarizing how well your project fits within the implementing organization.

- Items to cover:
  - Vision/strategy
  - Indicators
  - Structural
  - Culture
  - Processes
  - Performance Management

  If there is fit, why? How will you maintain it?
  If there is not fit in an area, is that OK?
  What will you do to create fit or overcome the lack of fit?

**Communication**
**Communication**

Will you or someone implementing the project ensure:
- Advertising/Marketing is conducted
- Pre-packaged leader and manager kits are available
  - May include ghost-written emails
- Leaders discuss the importance of your project’s implementation through communication channels
- Vision/strategy materials communicate the project as a top priority
- Regular communication about the project occurs to constituents
- Regular progress reports about the project are provided to the sponsor, stakeholders, and leadership team

Overall: What is the communication plan for your team’s implementation, containing these and other communication elements?

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**Measurement**

How does the organization measure its success?
- What is measured? Why is this measured? Is it used? How?
- What are the goals, levels and trends of the following measures:
  - Quantity
  - Quality
  - Budget
  - Time/deadline
  - Constituent Satisfaction
  - Product/service satisfaction
  - Support
- Who measures?
- Who gathers the data and analyzes it?
- Who reports it and how is it reported?

How is your project a part of the organizational indicators?
- If there are issues with the project and its implementation:
  - Who will measure, analyze, and do something about it?
- How will the Fellows’ project team help with the process, if at all?
- What are your project indicators? Do they contain implementation measures? Should they?
Measurement Exercise

- Prepare a 5 minute presentation about project measurement
  - Summarize the basics concerning measurement:
    1. How does the implementing organization measure its success?
    2. How will the overall project be measured?
    3. How will the implementation phase be measured?

For the success of your project:

- How will these three above be aligned?
- How will the project impact be measured, to ensure it achieves its goal (as stated in the assessment, opportunity/problem statement section)?
- How will reporting of the project & implementation phase occur?
  - To the sponsor, stakeholders, org. leadership, leaders/managers, and members of the org.
  - To constituents who are impacted by the project?
- Who will manage the product long-term, analyze data & make needed changes?

Scaling Project Success

1. How will this project be proliferated to other target audiences who could benefit?
   - Why or why not?
   - To whom and why?
   - When?
2. Which level of support would be needed?
3. What is the marketing that would be involved?
4. Who would provide resources to pay for it?
5. Would the Fellows’ team be involved in such an effort?
   - How?
6. What are the risks and barriers? How would they be overcome?
7. Who would own scaling the project?

Driving Change & Transition with Your Project Implementation

1. Sense of urgency
   - Examining the market and competitive realities
   - Identifying and discussing real or potential crises, or major opportunities
2. Guiding Coalition
   - Forming group with power to lead the change
   - Getting the group to work as a team
3. Vision & Strategy
   - Creating a vision for the change
   - Strategies to achieve the vision
4. Communicating Change Vision
   - Use every vehicle to constantly communicate vision
   - Guiding coalition role model behaviors

(Kotter, 2008)
Change Management

5. Empowering Broad-Based Action
   - Getting rid of obstacles
   - Changing systems or structures
   - Encouraging risk taking and creative actions

6. Short-Term Wins
   - Plan for visible "quick wins"
   - Create the wins
   - Visibly recognize and reward those who make wins

7. Consolidating Gains & Making More Change
   - Use credibility to change systems, structures, & policies to enact change vision
   - Hire, promote, develop those who can drive vision
   - Reinvigorate process with projects & change agents

8. Anchoring New Approaches in the Culture
   - Better performance through customer and productivity processes, better leaders & managers
   - Making connections between behaviors and success
   - Leadership development and succession

Panel Presentation Rules

- Each group creates a project implementation plan using their checklist
  - Prepares a 10-minute presentation to the panel
- Teams must manage their presentation time and questions during that period, as 10 minutes is a hard stop
- During the presentation, all workshop participants and panelists rate the presentation, using the Project Implementation Checklist.
- At 10 minutes, non-presenting teams huddle to consolidate feedback and discuss their feedback (10 minutes). Each workshop participant’s checklist (with feedback notes) are given to the presenting team.
- Panelists also complete the Project Implementation Checklist and once teams have discussed, provide their feedback to the presenting team (5 minutes).
  - Final ratings include the following:
    - A rating of green (this project is ready and should be implemented)
    - A rating of yellow (this project is ready if more work is completed)
    - A rating of red (this project is not ready for implementation)

Resources

Books:

Website: