More Project Performance Secrets

Course No: B04-004

Credit: 4 PDH

Richard Grimes, MPA, CPT

CED
engineering●com
PDH FOR THE PROFESSIONAL

Continuing Education and Development, Inc.
22 Stonewall Court
Woodcliff Lake, NJ 07677

P: (877) 322-5800
info@cedengineering.com

More Project Performance Secrets

Fulfilling more of the Project's Plan

Richard Grimes

Table of Contents

Course Introduction

How many projects meet 100% of the performance expectations that were identified during the strategic planning process? Is even hitting 90% realistic or is the number closer to 80%? How about 70%?

An article in the July 2005 issue of the Harvard Business Review, *Turning Great Strategy into Great Performance,* identified many reasons why companies typically only realize a little more than 60% of their strategies' potential value. This course builds on that article to help project leaders make sure they get the most performance out of the strategy which led to their project.

Many of the reasons projects do not perform as expected are not readily apparent. So when executives try to fix what they think are the problems, they may inadvertently:

➢ Exacerbate the problem

➢ Miss the problem and "search for the guilty" causing career damage to some in an attempt to place blame instead of looking for root causes of problems

➢ Create a new problem without really fixing the original one

➢ Waste additional critical resources in their hit-or-miss attempts to fix things

➢ Damage the project team's morale

➢ Damage the credibility of the project leaders

➢ Reduce the likelihood of success for more projects in the future

We will take a "here's-the-problem, here's-a-solution" approach to help students of this course not repeat common project mistakes and maximize the potential of their project's performance.

The eleven most common reasons that performance did not match strategy from their research are these:

1. **Inadequate or unavailable resources** (7.5%)
2. **Poorly communicated strategy** (5.2%)
3. **Actions required to execute not clearly identified** (4.5%)
4. **Unclear accountabilities for execution** (4.1%)
5. **Organizational silos and culture blocking execution** (3.7%)
6. **Inadequate performance monitoring** (3.0%)
7. **Inadequate consequences or rewards for failure or success** (3.0%)

8. **Poor senior leadership** (2.6%)
9. **Uncommitted leadership** (1.9%)
10. **Unapproved strategy** (0.7%)
11. **Other obstacles** (including inadequate skills and capabilities) (0.7%)

Total = 36.9%

We will offer practical solutions for most of these problems (we cannot do anything about 'poor senior leadership') so you can take measures to reduce their impact if not eliminate them altogether.

They will not be taken in descending order by percentages but rather in the most practical way they can be addressed in the real world. That means we will start with the "Uncommitted Leadership (1.9%)" and "Unapproved Strategy (0.7%)" because any strategy, *if it is to have any chance of success*, must begin with the support and approval of the leadership. If you have the executives on your side, they can help remove many of the other obstacles listed among these sources of problems above.

Let's get started!

Uncommitted Leadership & Unapproved Strategy (2.6%)

(1.9% + 0.7% = 2.6%)

The leadership's lack of commitment to the strategy (and the subsequent project intended to execute that strategy) could have its root in a poor presentation when the strategy was originally presented to the leadership. [We explore this concept farther in our course titled, *"Financial Proposals: the Why and How"* available also on this website.]

This section will provide the "big picture" to anyone with the responsibility of developing and presenting a financial proposal for new equipment, staffing, reorganization, or additional resources as part of a strategic initiative.

First, we will introduce the essential elements that are critical to a successful proposal. Without understanding and implementing these, you are just wasting your time, that of the executives, and risk damaging your credibility.

After that is the selection of the type of proposal you want to make and tips to insure you include all of the relevant factors.

Then you must have a clear picture of where you are now so you can persuade the eventual proposal audience that must be moved from their current position to one supporting your initiative. Present this picture using statistics drawn from historical data to describe trends and make realistic forecasts of the future requirements. (It is beyond the scope of this course to go into greater depth with statistics and forecasting.)

Finally, preparation of the proposal means careful selection of words to use and a carefully crafted strategy of presenting them in the best sequence for maximum effectiveness because ***you only have one chance to make a good first impression.***

Do Not Make These Mistakes

Five sure-fire ways to make sure your proposal (and credibility) BOMBS is to:

1. Assume the obligation for a "yes" is on the approver and not you! (It is up to you to convince them: not up to them to believe you.)

2. *Think that if you get a "NO", you no longer own the problem that* prompted your proposal. (The problem that led to your proposal for a change IS STILL THERE: you still have to deal with it. Do not assume that their 'No' means, *'Well, I tried so now I'm out of it.")*

3. Just drop it off on your boss' desk assuming he or she will figure out what you want and instantly act on it.

4. Come up with a great idea, then tell your boss about it (but never document it as a proposal), expect him/her to make it happen, and then complain about lack of management support when nothing happens.

5. Fail to show some "passion" about NEEDING (not "wanting") it.   If it does not excite you, the 'parent' of this idea, why should it excite anyone else?
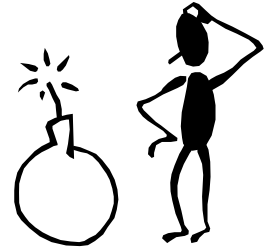
The Three Essentials of a Successful Financial Proposal

A successful financial proposal must contain at least these three essential elements:

- ➢ You must identify benefits as seen t*hrough the eyes of the executives.* Ask yourself, "What's in it for them to approve this?"
- ➢ You must have accurate and comprehensive numbers including trends and realistic projections
- ➢ You must demonstrate passion for the business needs that is contagious with the audience of approvers.

Identifying benefits as <u>seen through the eyes of the executives</u>

Accurate and comprehensive numbers

Strong passion by the presenter, which demonstrates <u>a BUSINESS NEED</u> for the change

The checkerboard area has the greatest probability for success.
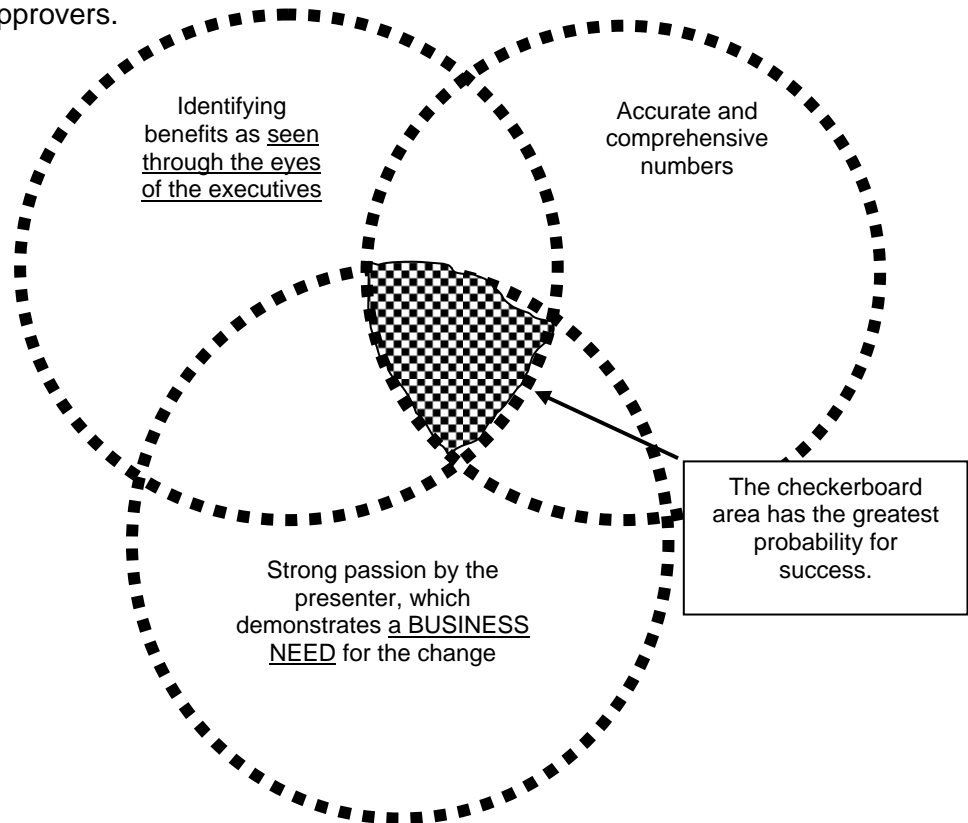
Types of Proposals

1.) Regulatory – required changes by government
   Not looking for benefits
   a) Still must identify most cost-effective way to implement (Remember that even if there are penalties for not doing it, you are still accountable.)
   b) May have time sensitive issues involved
   c) How are other organizations like us dealing with this?
   d) Are there any penalties for not doing it?

2.) Non-Regulatory (Business Decision) – changes not required but desired for business benefits.
   a) **Is looking for benefits**
      i) Quantifiable
         (1) "Hard"
            (a) Specific dollars listed
            (b) Saying "Will result in this…"
         (2) "Soft"
            (a) Estimated dollars
            (b) Saying "Should result in this…"
      ii) Expressed as savings or efficiencies in;
         (1) Time
         (2) Production time required to achieve desired result
         (3) Wage time (salaries or hourly + 28% benefits)
         (4) Postage
         (5) Consumables (paper, pens, pencils, preprinted forms, etc.)
         (6) Travel
         (7) Legal
         (8) Training
            (a) Cost of instructor (fees + expenses)
            (b) Cost of materials
            (c) Cost of lost production while trainees are in class
         (9) Not easily quantifiable but important
            (a) Prestige
            (b) Good will
            (c) Morale
   b) Types of Business Decisions
      i) Issues to consider
         (1) Equipment related
            (a) Old vs. Proposed New
            (b) Operating savings (Spend less money while obtaining current production results)
            (c) Efficiency (More production while spending current amount of money)
            (d) Save money AND get higher production
            (e) Reconfiguration issues commonly overlooked
            (f) "Footprint" of new bigger than of old
         (2) Rearrange other equipment to accommodate the new
         (3) Reconfigure wiring (data & power) to support new
         (4) Reconfigure the work area to accommodate the new
         (5) Change existing workflow to accommodate new
   c) Hardware issues commonly overlooked
      i) Purchase
         (1) Discounts for volume
         (2) Discounts for timing (end of year, etc.)
         (3) Maintenance agreements

               (4) Multiple sites discount

               (5) 24/7 vs. on call differential

          ii)   Training of operators

               (1) Cost of instructor (fees + expenses)

               (2) Cost of materials

               (3) Cost of lost production while employees in training

          iii) Installation

               (1) Time required

               (2) Other machines shut down with production lost

               (3) Affect on existing workflow during installation, testing, and training

  d) Process Related

               (1) Old vs. Proposed New

               (2) Operating savings (Spend less money while obtaining current production results)

               (3) Efficiency (More production while spending the current amount of money)

               (4) Save money AND get higher production.

               (5) Reconfiguration workflow issues

               (6) Rearrange other processes to accommodate the new

               (7) Retraining requirements

               (8) New support costs anywhere along the flow.

               (9) Affect on existing workflow during installation, testing, and training

  e) Details frequently overlooked

          i)   Salary (exempt) vs. hourly reduction

          ii)   Does salary (exempt) actually "go away" or is it just transferred to another cost center? (Note: Hourly actually goes away.)

          iii) Don't overlook incentive or overtime costs that may go away

          iv) The cost of benefits is 28-35% added to the cost of wages.

3.) Defining the SCOPE of the finished product

  a) Focus on 90 days after completion of the project to account for:

          i)   Training issues

          ii)   Reconfiguring work space, work flow, or wiring

Your Presentation Strategy

We suggest this as a guideline to help your presentation to the executives be more effective.

WHAT IS IN IT FOR THE EXECUTIVES?   (Why should they act on your proposal?)

You have a greater chance of success with your proposal if you focus on demonstrating how your ideas will help them:
  1.) Save money
    a) By not spending new money (cost savings)
    b) By spending less money (cost reduction)
  2.) Save time
    a) By reducing overtime (cost savings).
    b) By reducing the time it takes to complete a process (increased productivity).
    c) By reducing the number of people needed to accomplish something (cost savings).
    d) By reducing the time needed for rework or error correction (increased productivity).

Naturally, when you help them look good, your reputation improves, too!

Your proposal should use words or phrases to increase their confidence in what you are proposing. These words and phrases are known as "hard references" which carry greater weight in their mind than do "soft" ones. For example, saying, "It will cost exactly $43,123.87" carries greater weight than saying, "We estimate it should cost about $43,000."

Use this model on the next page as a guideline for laying out your presentation until you gain enough experience to plan and speak confidently without it. The key phrases in the sample are explained farther on the page following the sample.

A Model for Your Presentation

This is a successful proposal from a bank's data processing center asking for new software.

This is the introductory _"hook"_ that captures the approver's attention.

EXECUTIVE SUMMARY
We can reduce our IP headcount and meet Fed deadlines earlier with changes in sorter software. We can also achieve a check micro line read rate increase from 48% to 70+%.

The _"transition"_ connects the hook to the existing situation that you are trying to change.

The amount of checks we present nightly to the Federal Reserve from our three processing centers is determined by two primary factors:
- *The amount we can clear, either mechanically via the sorters or manually by clerks keying data.*
- *The volume of work received.*

This is the _"existing situation"_ that you are trying to change with your proposal.

Atlanta and Birmingham have old systems with outdated, non-Windows software while Florida is comparatively new complete with industry standard Windows NT software. This older equipment is at its maximum capacity and cannot expand while Florida still can.

Atlanta and Birmingham consistently have higher labor and maintenance costs per unit volume of work processed than does Orlando. Our labor and sorter maintenance costs will continue to increase with our work volume if we do not act soon to change the present conditions.

These are the _recommendations_ that you are proposing.

We recommend two major changes in our present situation.
Upgrade the software in the Birmingham and Atlanta sorters to XXXX that we use in Orlando. It is a proven platform that will allow us to expand our capacities in Birmingham and Atlanta. This will also decrease our non-productive "downtime" as shown in attached comparisons between centers and give us a uniform platform across all three centers.

The amount this proposal will impact our overall budget this year.

Second, that we install "Speed-read" software in all three centers to increase our sorter "read rate" from an average 48% of checks to over 70%. This will have a dramatic decrease in the amount of manual labor required to process checks plus allow us to meet more Fed deadlines earlier.

We budgeted $900,000 this year for this project based on vendor estimates. Unanticipated installation wiring code changes in our city require an additional $85,000. This results in an impact of $85,000 more than we had budgeted.

This is your _specific request for action_.

We request approval to spend $900,000 that was budgeted and an additional $85,000 for the local building code for a total of $985,000.

This is _how we will pay for it_ over time.

We will recover this within 5 years from labor and maintenance savings.

Note: Take a prewritten approval form that the executive(s) can sign on the spot in case everyone says, "Yes!" You must be ready to "strike while the iron is hot" and not waste the opportunity. You can use this signature to get things moving even if you must wait for a formal signature later.

Use this summary model to make sure you have addressed most of the issues that will probably come up when you present your proposal to an executive. Remember that there is no "cook book" that will guarantee success every time. This will help you cover the most likely issues.

The "HOOK"

Your "headline phrase" should get the approver's attention and make him/her want to find out more about making this a reality. This can get the approver thinking toward "YES!" before you say the first word!

"We can reduce our Items Processing headcount and meet Fed deadlines earlier with changes in sorter software. We can achieve a CAR read rate increase from 48% to 70+%" will get executives focused on potential savings while you explain the costs associated with buying new technology to achieve those savings.

The "TRANSITION"

The transition phrase gently leads the approver from the highly desirable situation you describe in the hook into the current situation that you want to change.

THE "EXISTING SITUATION"

You should explain briefly and objectively why the current situation requires your proposed improvement. (Try to keep it under 100 words.)

YOUR RECOMMENDED SOLUTION

Clearly, specify WHAT you want to do here. Explain the why, how, where, and when in your proposal. Remember that this is just an executive summary.

CAUTION #1: Be sure you can you explain clearly, why this recommendation is the best choice in case the approver wants to know why you recommend this particular action and not something else.

CAUTION #2: Also, make sure you have available a list of YOUR REFERENCES. Do not provide this unless asked (it may be distracting to your proposal). List the names, titles, and telephone numbers of people (employees or vendors) from whom you collected data or who can offer additional information if needed.

THE BUDGET IMPACT

How much above or below what we had budgeted for this? If we budgeted $50,000 last fall for this budget year and it only cost $45,000, the IMPACT is +$5,000 ($5,000 that we can free to spend elsewhere or save.). If it now costs $55,000, the impact is -$5,000 ($5,000 that we have to take from somewhere else or go over budget.)

WHAT ACTION DO YOU WANT FROM THE EXECUTIVES?

Do you clearly know what decision you want?

TELL THEM HOW IT WILL PAY FOR ITSELF (Add a spreadsheet here)

Make sure it is a one or two line summary. Leave the details in the financial section.

Organizational Silos and Culture Blocking Execution (3.7%)

Here are two methods for dealing with those organizational silos:

1. Spend plenty of time preparing your proposal and its presentation to the executives as we discussed starting on page 8. If you can get their strong support for your project, this can help you break down many silos and culture blocking situations including the generic excuse not to act that we always hear: "We just don't do it that way!"

2. Conduct a pre-project "post mortem" that can help you identify potential issues that could sidetrack your strategy execution *before* you get started. [We expand this concept farther in our course *Reducing Post Project Blues"* available also on this website.]

The Pre-project "Post Mortem"

Research conducted in 1989[i] found that *prospective hindsight* – imagining that an event has already occurred – increases the ability to identify reasons for future outcomes by **30%!**

Using that as a foundation, we suggest you try leading your team's pending project in assuming it **has failed in a spectacular fashion** – not just asking *what could fail.* This assertion of what has happened instead of what could happen will help the team visualize the hypothetical disaster more clearly to avoid it in reality.

No, this is not another walk down the heavily-trafficked project preview road asking, *"What could go wrong with our project?"* It will be much more direct than that. Also, it's not an exercise in risk analysis that assumes we're going ahead 'as is' and asking "what is the risk if we do?"

The project's manager and key members should meet before the project planning stage (if possible) and assume the project **FAILED TOTALLY and COMPLETELY.** Then, if the findings from that 1989 research are correct, use the best brains on the team to identify what led to its hypothetical demise. Once you know what led to it, steps can be taken to prevent that from happening.

Albert Einstein is credited with saying (paraphrased), *"Insanity is doing things the way you always have and expecting different results!"* This course helps you go upstream to identify what

(hypothetically) went wrong to kill the project and change those things so they do not lead to the same disastrous outcome.

Once the team has identified the reasons for the project's hypothetical death, the PM can work to avoid the potential problems or develop contingency plans just in case the worst case becomes reality.

Brainstorming Reasons the Project Died

We suggest a brainstorming session to collect from the project's key members reasons for the project's (hypothetical) failure. Although there are many ways to do this, we have found three methods useful which we will describe here.

- ➢ "Around the Table"
  - o Everyone adds an idea while someone records them. If they do not have an idea, they just say "Pass."   No evaluations or opinions on ideas presented are allowed from members - just solicit their ideas. Keep going around the table until everyone has exhausted their ideas and says "Pass."

- ➢ "Chaining Ideas" Once again, there should be no discussion among team members after initial instructions are given.
  - o Each member gets a small packet of Post-It notes
  - o The member writes only two things on each note: one is the <u>category</u> of the topic (write it at the top half) and the second is the <u>specific issue of concern</u> within that topic (written at the bottom like the sample to the right.)

  > *Vendor relations*
  > (The category)
  > _____
  > *Dispute resolution*
  > (The specific issue)

  - o Then, without comment being made, they silently take their post-it notes to the wall or white board, and stick their note on it. If they are not the first, they look for any other category that matches theirs or is close to theirs. Then they stick their note to the bottom of the previous one posted. This creates a chain of ideas under different categories without argument and potential intimidation between team members.

- o The facilitator reviews all the categories and combines them when they are similar.
- o The length of the chains or the number of different ones will give a visual idea of the range of potential problems (categories) and specific issues within those topics.
- o Another value of Post-It notes is that chains can be moved or rearranged in any manner. It makes it very easy to manipulate the data for ease of discussion and analysis.

➢ "Rapid List Generation and Prioritization" This is an easy way to collect ideas and put them into a priority rank order with minimal discussion and argument.

We will demonstrate how it works with an example of trying to get the team to agree on what they want for lunch.

o **Step 1** - Make a vertical list of about five or six ideas for lunch: pizza, bar-b-q, Chinese, Italian, salad bar, sub sandwiches

Step 1 –
Solicit a random-response list
Pizza
Bar-b-q
Chinese
Italian
Salad bar
Sub sandwiches

o **Step 2** – Number the responses in the vertical list

o **Step 3** – Pair the numbered responses like the sample shown in vertical arrangements.

Step 2 –
Number the responses
1. Pizza
2. Bar-b-q
3. Chinese
4. Italian
5. Salad bar
6. Sub sandwiches

Step 3 - Set up the scoring by vertically pairing the response numbers

```
      1
      2

    1 │2
    3 │3

  1 │2 │3
  4 │4 │4

1 │2 │3 │4
5 │5 │5 │5

1 │2 │3 │4 │5
6 │6 │6 │6 │6
```

After the responses are numbered and vertically paired, ask the team members for their preferences <u>between each pair at a time</u>, NOT THE ENTIRE LIST AT ONCE. They vote with a simple show of hands, not a discussion.

The facilitator would say, *"We are looking only at numbers 1 and 2; pizza and bar-b-q, NOTHING ELSE at this time. All of those who would prefer pizza please raise your hand without comment."* The facilitator counts the hands (without group discussion) and circles the number that represents the largest choice – either pizza or bar-b-q. (If there is a tie, the facilitator breaks it.)

Then the facilitator continues to compare them in vertical pairs and says, "Now your choice between #1 pizza and #3, Chinese." Once again, count the hands and circle the number with the largest number. This goes on until the team has voted for their preference of each pair.

The end result could look like this sample.

Then, just count the number of circled choices to determine the priority is **PIZZA!**

1. Pizza (4 wins)
2. Bar-b-q (2 wins)
3. Chinese (1 win)
4. Italian (2 wins)
5. Salad bar (3 wins)
6. Sub sandwiches (3 wins)

If there had been a tie between categories, then match the categories and vote again with the facilitator being the tiebreaker. The beauty of this process is that there are no comments during the voting, it happens right in front of the audience so no one can claim the outcome was somehow biased, and you may get an unexpected outcome.

Step 3 - Set up the scoring box by pairing the response numbers

Additional Critical Questions

After you have collected your team's speculations on the project's "death", ask these additional questions as a way to make sure you have considered as many contingencies as possible.

1. What are our intended results and measures for this project overall?
   a. Do they include specific measurements of quality, quantity, and time or are they 'soft' and focused more on intangibles such as a "satisfied client?" Using measurables, at what point is the client satisfied? Is it an either-or event ("satisfied -Y or N?") or can there be degrees of satisfaction?
   b. Do we have progress measurements for each functional group within the project so we can monitor their progress, too? Since the overall project outcome is the sum of the success of the functional parts, how will we know if things within the lower portions of the project are going well?
2. What challenges can we anticipate that may have not been identified earlier?
   a. How well do we communicate with each other in the project?
   b. Are there clear channels of responsibility or is there a danger of 'turf wars?'
3. What have we learned from previous projects like this?
   a. Have any of our project members been on projects like this that can help us get an idea of what may happen?
   b. Can we create lists of activities we should start, stop, or continue doing on this project that can act as a lesson learned from other projects?
   c. How can we share the learning throughout our team?
4. What will make us successful this time based on what we have learned from the previous attempts? (The Albert Einstein 'insanity' definition again.)
5. Can we break the large project down into smaller chunks for easier analysis, measurement, and monitoring progress?

Writing the Project's Obituary

Once the PM and any assisting key project members have a list of issues that theoretically killed the project, he or she can begin taking steps to remove the potential problem or develop a work-around that will diminish its impact.

For example, some potential issues could be:

1. *"We have functional silos keeping us apart. Marketing promises anything and engineering has to figure out how to deliver what those dreamers promised! It's no wonder that we don't get along!"* – If you know those silos exist, what can you do before starting the project to reduce their potential for damage?

2. *"The project champion left and momentum just died"* – What would you do as a precaution against that?

3. *"Our source for the critical component went bankrupt and delivery stopped."* Should you develop a 'safety net' by having some backup in place?

4. *"We never heeded the warning signs that the project was slipping beyond recovery."* What are the signs that could tell us this? How can we monitor them to make sure we don't have this happen this time?

Some of the topics you receive may seem to be so far fetched that they defy reality while others may seem so obvious you wonder why someone took the time to write them down. This process of collecting reasons the project died is about getting as many ideas as possible as early as possible. Save the judgment until later because you do not want to inadvertently discourage anyone from speaking up.

Please remember this; *the most valuable idea may come from your least expected source.*

Inadequate or Unavailable Resources (7.5%)

The tactics we will discuss here are designed primarily for dealing with external, traditional vendors but they can also be applied to our internal vendors. If we can improve the way we deal with vendors, whether in-house or outside, we may be able to improve the availability of critical resources when we need them and in the quantities and quality necessary. [These concepts are expanded in our course also on this website, *"Creating a Successful Vendor Relationship."*]

Changing How We Regard Vendors

If you are like the typical client who looks at vendor services as a ***basic commodity-for-cash transaction***, you probably have difficulties with many of your internal and external vendors.

"After all," you probably think, "vendors of this product or service are a dime a dozen! I am in the driver's seat. He/she has to make me happy or I'll look somewhere else!"

Would you take that same idea that *a vendor is just a basic commodity-for-cash so I do not have to worry about how I treat him/her* viewpoint with…

Your doctor?   **Your mechanic?**

  Your lawyer?   **Your accountant?**

Most people would say something like, *"No! They take care of my personal life and would be too hard to replace!"*

However, ask yourself if their services-for-money relationships with you are <u>truly</u> different from a vendor at work or have you just never thought of them the same way?
If there were a way that you could feel the same about a workplace vendor that you feel about your personal physician, mechanic, lawyer, or accountant, *could that possibly*

1. *Improve the way you deal with the vendor and,*

2. *Possibly improve the service that you get from them?*

This is the viewpoint we take with this course: y*ou can improve your vendor's service if you will consider improving the way you view them.*

What Vendors Want

Do you think this statement, ***"When your employees get what they want, you'll get what you want"*** could be applied to a vendor as well as employees?   Why?

A response from vendors [1] who say they want:

- ✓ **Respect** – The vendors' senior executives want access to their customer counterparts. "If the CIO doesn't want to meet with me, then that's an indication of the value that I'm bringing to the relationship."

    (**QUESTION:** Do you think vendors are reasonable in wanting that? Why?)

- ✓ **Consistency** – Vendors know that some of them are treated as commodities and others as partners and they understand that. ***However, what they do not want is to be treated one-way one day and the other way the next.*** That inconsistency causes many problems.

    (**QUESTION:** Do you think vendors are reasonable in wanting that?   Why?)

- ✓ **Guilt-free profit –** Vendors need to make a profit, too, if they are to stay in business and support their clients. If deals are only structured to benefit the customer, then do not expect the vendor to invest their best resources in the account.

(**QUESTION:** Do you think vendors are reasonable in wanting that?   Why?)

---

[1] CIO Magazine, August 1, 1998 *Special Report – For Better of Worse*

Complaints about Vendors

Typical complaints from clients about vendors:

1. They are always selling, never solving
2. It's always about them, never about us
3. They bombard us with much-too-complicated billing and labor intensive account-relationship trivia
4. Once the contract is signed, the relationship changes dramatically
5. The highly-qualified consultants that helped close the deal are suddenly unavailable
6. The vendor blames you or your staff for the failure to show progress
7. The vendor bills plenty of hours but actual progress doesn't occur

Take a few minutes to consider each of the statements above and answer these questions about each one:

- ✓ Do you think the statements are, for the most part, accurate? Why?

- ✓ What may be some common reasons *among all of the statements* that may explain why vendors act like that?

- ✓ Do you think clients do anything to create an environment that would cause problems like those? If so, what do they do?

Starting with the Outcome

"You've gotta have a dream
If you don't have a dream,
How you gonna have a dream come true?"

-Rogers and Hammerstein's *South Pacific*
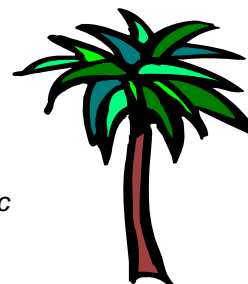
Before you start looking for a vendor for your next outsourcing project, take some time to visualize what you want the relationship with that vendor to look like, act like, feel like, and sound like.

As strange as it may seem, those Rogers and Hammerstein lyrics from *South Pacific* can apply to the business world when considering a relationship with a vendor: *if you don't have a dream, how you gonna have a dream come true?*

We begin by thinking about a "dream" relationship with a vendor. Collect your project team (or the key people who will have a say in the vendor selection and managing the relationship) and brainstorm these questions. (Remember that in brainstorming there are no value judgments made about responses. Just collect the ideas and evaluate them later.)

1. What kind of **SOLUTIONS** (not deliverables) do you desire regarding these issues? Hint – a successful *relationship* with a vendor, a friend, or a spouse involves much more than just the product.)
    a. Billing statement format and accountability
    b. Missing deadlines (such as product delivery [vendor] or payment [client])
    c. Resolving issues not specifically addressed in the contract
    d. Scope changes made that were not properly authorized first
    e. Oral, verbal, and written communications between vendor and client
    f. Replacement of project team members if requested by "other side" (If the vendor's representative had problems getting along with their client counterpart, how would this be resolved?)
    g. Educating each side about the other's values, concerns, and aspirations

2. What kind of different tasks are you *and they* involved in if you had a dream relationship with them? (Such as sharing employee development opportunities and costs)

3. What kind of reporting would you want from them *and what would you be willing to give to them?*

4. We identify five Components of Motivation later in this course on page 38. Think about how you could include as many of them as possible in a relationship with vendors – internal or external.

5. Review your thoughts on typical vendor relationships on page 22. How much would you be willing to rethink the way your organization deals with vendors so that your comments were *balanced between the client and vendor* instead of tipped to favor the client?

6. How can you handle scope changes so they do not become a source of contention in the relationship?

7. Are the desired products or services from the vendor *tactical* or *strategic*? Which is best for your situation? (Are you more concerned with *what* they can do -strategic- or *how* they will do it - tactical?)

8. What behavioral traits would you want in the ideal vendor representative? What kind do you think they want from the client's representative?

9. Southwest Airlines (the only profitable major airline in the US) uses this to guide their hiring - ***"Hire for Attitude, Train for Skill."***

   Why would that be a smart approach to hiring in a service-related industry?

   (A customer-focused attitude is essential in a service industry like the airlines. People are born with that attitude, it cannot be taught as technical skills can. Southwest admits that while it can teach technical skills such as ticketing, cabin service, or baggage handling, it cannot teach people to be caring and concerned about their customers.)

   How could that same philosophy be useful in selecting a vendor?

   (Time spent searching for a vendor AND THEIR REPRESENTATIVE who is genuinely focused on providing customer service before haggling over deliverables will provide a stronger, longer relationship. CAUTION – the client must be equally dedicated to the success of the vendor or this becomes too one-sided and will deteriorate.)

Developing the Foundation for a Relationship

Let us take a moment to summarize where we are:

1. We suggest that a vendor is actually no different from an employee of our organization (employees and vendors are paid to perform specific tasks.)

2. The employee/vendor – *not the employer/client* – determines where they work within the performance gap

3. There are some specific techniques that can be used to motivate employees

4. We can choose to view vendors like we do professionals in our personal lives

5. Vendor wants and needs, from a business perspective, are not really much different from ours

6. We can describe what we would expect in a "dream" relationship with a vendor

7. We can use that description (# 6 above) as the foundation of our strategy if we are willing to take ***an unorthodox approach*** to dealing with vendors.

Never disregard an unorthodox approach to solving a problem. Take a moment to consider the history of 3M "Post-It Notes"

Everyone knows what Post-it notes are: They are those great little self-stick notepapers. Most people have Post-it Notes. Most people use them. Most people love them. However, Post-it Notes were not a planned product.

No one got the idea and then stayed up nights to invent it. A man named Spencer Silver was working in the 3M research laboratories in 1970 trying to find a strong adhesive. Silver developed a new adhesive, but it was even weaker than what 3M already manufactured. It stuck to objects, but could easily be lifted off. It was super weak instead of super strong.

No one knew what to do with the stuff, but Silver did not discard it. Then one Sunday four years later, another 3M scientist named Arthur Fry was singing in his church choir. He used markers to keep his place in the hymnal, but they kept falling out of the book. Remembering Silver's adhesive, Fry used some to coat his markers. Success!

With the weak adhesive, the markers stayed in place, yet lifted off without damaging the pages. 3M began distributing Post-it Notes nationwide in 1980 -- ten years after Silver developed the super weak adhesive. Today they are one of the most popular office products available.

RFIs, RFPs and Teambuilding

This course presents broad guidelines for a new approach to creating a successful relationship with vendors. It is <u>not intended</u> to be a procedural guide for developing RFIs, RFPs, or contracts because there is plenty of information about those topics already in the marketplace.

We believe in the premise that if you help people clearly understand the "why" of something, they can figure out the "how" that is best for them.

The Request for Information (RFI)

We believe the foundation for a successful relationship with a vendor begins with the **Request for Information** (RFI), which includes the strategy we describe in this course.

The RFI is used traditionally when a potential buyer needs to determine what is available from suppliers who may respond to it. Additionally, buyers can use this to determine whether their expectations are realistic and if solutions exist in the market place. Finally, it also gives potentially interested vendors a chance to influence the Request for Proposal (RFP) that follows by pointing out potential problems or unrealistic expectations (as written) that may prevent anyone from bidding later.

Vendors responding to the RFI are probably following the old supplier adage, *"If you don't help write the RFI, don't bother with the RFP!"*

The Request for Proposal (RFP)

A RFP can be many things to many people. An IT client seeking a software solution may structure it differently than a government agency looking for a food service provider. Regardless of the nature of the writer's industry, the common elements of a typical RFP include:

1. Allowing a buyer to notify the market of its desire to obtain new technology or services, lay the foundation for the project that will deliver the technology or services, and manage the project itself
2. Forcing suppliers to create competitive solutions for the buyer's problems

3. Providing a common base of requirements for all bidders thus reducing the potential for claims of unfair competition from losing bidders
4. Making it easier for the buyer to understand the differences between bidders

Teambuilding with a Vendor

Our unorthodox approach to developing a successful relationship with a vendor is very much like designing a *teambuilding* activity. (When you think about it, a client-vendor relationship IS ALL ABOUT TEAMBUILDING!)

When a teambuilding facilitator is asked to develop some teambuilding activities to encourage groups to work together better, some of the first questions asked are, "What will success look like? What are your interests and concerns? How will you know that I've earned my fee?"

Questions like that force the potential client to think in terms of *interests, needs and services* rather than *specific deliverables*. In other words, **the client becomes more concerned with allowing the expert to provide a solution to their pain and problems than with the deliverables needed to provide it.**

Think about this……

> When visiting your dentist for relief of a toothache, are you more concerned about relieving the pain or how it is done and at what cost?

We become <u>less</u> concerned with price when <u>more</u> of our needs and interests are being met.

"If that's true, then why do so many RFPs focus on deliverables?" you ask.

The reasons are simple yet difficult to overcome:
- ✓ The client knows his/her needs better than the vendor and then makes the natural leap to specifying what he/she thinks is the solution for that need.

✓ There is a natural distrust of "outsiders" and we do not want to give them any more latitude than necessary for fear of paying too much or being at their mercy.

✓ It is how we have always done business with vendors.

Now let us go back and look at those same reasons from a different perspective.

✓ *The client knows his/her needs better than the vendor …*We agree and do not argue with this part!

"*…and makes the natural leap to specifying what he/she thinks is the solution for that need.*"

Here is where we disagree! If the client had a toothache, would he tell the dentist how to provide relief? Of course not! Likewise, if we consider potential vendors to be experts in their fields instead of just commodities-for-cash, then we must allow them to suggest a remedy for our organizational pains. (It is still our choice whether to accept that advice!)

<u>We cannot expect them to provide expert advice and help for us while treating them like a necessary evil that we must endure while getting our problem solved.</u>

(Would you treat your dentist that way?)

✓ *There is a natural distrust of "outsiders" and we do not want to give them any more latitude than necessary for fear of paying too much or being at their mercy.*

Here, again, we disagree with the traditional approach to dealing with vendors. Think about buying a car. For many people, this is an activity to be avoided at all costs because *we are afraid of paying too much and being at the mercy of the salespersons.*
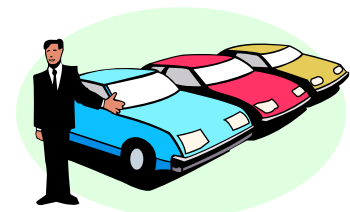
However, suppose we prepared ourselves better for the car-buying experience by doing some homework first before we stepped on the car lot.

We can take time ahead to:

1. Define our interests and needs so we can say "No" when a salesperson tries to lead us down a path that is not best for us.

2. Determine what "success" looks like in terms of down payment, monthly payments, interest rates, and options instead of allowing the salesperson to push us.

3. Learn more about dealer costs via some 'Net surfing to give us more options for striking a satisfactory deal.

4. Learn how many different manufacturers and models would provide the "transportation solution" we are looking for so we do not feel trapped by any one dealer.

We gain confidence and power with knowledge of our needs and options. Suddenly, the sales representative is not so intimidating any more! Why should we not take that same approach with a potential vendor?

✓ *However, are you saying that we should NOT focus on deliverables, terms, conditions, and cost but only on our interests?*

Of course not! But if you focus **MORE** on defining "the dream" (page 24), sharing that definition with your vendor, and getting your *dream satisfied* and less on deliverables, <u>you have a greater chance of a satisfying relationship with your vendor.</u> The more satisfying your relationship becomes, the stronger your links to each other's success and the greater the chance to avoid expensive disputes.
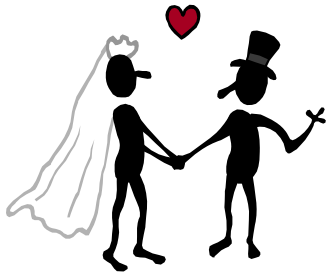
Think about this……

Can marriages with pre-nuptial agreements have much hope of success? It seems that when participants in a relationship focus more on the terms and conditions of it than on its ultimate success, they practically invite disaster!

The relationship that we are describing here with clients and vendors is a *quasi-marriage* where both sides share common interests and work with each other to achieve them. The synergy resulting from their mutual effort is greater than the combination of each of them working alone.

13.8% of the Reasons for Failure

Poorly Communicated Strategy (5.2%) + Actions required to execute the strategy not clearly defined (4.5%) + Unclear accountabilities for execution (4.1%) = 13.8%

A common aspect of these three reasons falls under the category of "performance problems." In other words, if you can clearly define your expectations in terms of quality, quantity, and time ("How good, how many, and by when?"), you will:

➢ Communicate your strategy much better

➢ More clearly define the actions required to execute the strategy

➢ Make accountabilities very clear to team members.

We will expand defining expectations a little more next. (Note: We present a more detailed analysis of performance and productivity in our course, *"No Cost Ways to Improve Productivity"* available on this website.)

Understanding Performance

One day Alice came to a fork in the road and saw a Cheshire cat in a tree. "Which road do I take?" she asked. "Where do you want to go?" was his response. "I don't know", Alice answered.

"Then", said the cat, "it doesn't matter. When you don't know where you are going, any road will take you there." (Lewis Carroll, *Through the Looking Glass or the Adventures of Alice in Wonderland)*

The Cheshire cat's response is a model for much of the difficulty with defining performance in the workplace today as employees hear hard-to-define phrases like these:

• "Make it look very professional"

• "I know you will do a great job!"

• "Go that extra mile!"

• "Make it a world-class effort!"

• "Make sure they get their money's worth."

• "I will need that report in a timely manner."

By the time you finish this course, you will be able to define your performance expectations very clearly, have no doubt in your mind (or the other person's either) if they have met your expectations, and feel very confident that you will get exactly what you are expecting.

The Elements of Performance & Productivity

Nearly every article written about performance always includes the concept of SMART goals (From Paul J. Meyer's *"Attitude Is Everything")* According to this, goals should be **S**pecific, **M**easurable, **A**ttainable, **R**ealistic, and **T**angible.

While that certainly encompasses the overall concept of performance and gives people another acronym to use even when they are not sure what it all means, it leaves out a critical component: *how do we measure subjective items or activities such as:*

- Team work
- Communications skills
- Customer service
- The best cake in a baking contest
- The best picture in a photography contest

In this discussion, we will not mention performance without associating it with productivity because productivity is why employers pay people for work. They do not pay for just doing things ("performance") but for doing things *with a destination in mind* – productivity.

This goes back to the Cheshire cat's comment to Alice: *when you do not know where you are going (predefined productive outcomes), any road will take you there.*

The Critical Trio

Just as there are three critical elements necessary for fire (fuel, heat, and air), there are three critical elements necessary for **productivity** (which is much different from just "being busy'): **quality, quantity, and time.** We will abbreviate them into QQT for convenience.

Productivity means people clearly understand how error-free it must be (quality), how many you require, and by when (time.)

It's Showtime

Another aspect of performance is **allowing the employee to work alone to master the skill.** You must also be willing to let them fail as part of the learning process. (NOTE: "Letting them fail," means you still provide a safety net so they do not harm the organization, someone else, or themselves. Still, many people learn best from a trial-and-error approach. If you do not believe this, what is the first thing most people do when they se a "Caution: Wet Paint' sign?) How conducive is your organization's culture to letting employees fail 'safely as a learning tool?'

Feedback Loops

People must be to tell how they are doing without having to wait to be told (especially from the boss.) There must be a feedback loop in the work process that allows the employee to self-monitor their progress.
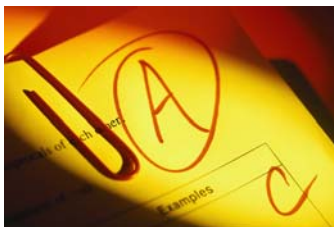
Think back to when you were in school. Did you have to wait until the report cards came out before you knew how you did that semester or were there ways for you to keep track?

The grades you got back on tests, reports, and homework plus staying out of trouble and making sure you were not excessively late or absent created a "feedback loop" that let you know how you were doing without having to ask the teacher everyday.

In addition, the teacher gave you the system for grading at the beginning of the school year. The system may include how many days you be could absent without hurting your grade; the progressive scoring range such as <65 = F; 65-70 = D; 71-80 = C; 81 – 90 = B; >90 = A; a term paper weighted to count as three grades; the midterm test counts half of the final grade; etc.

With that feedback loop, you could track your own progress and had an answer every time your parents would ask, "How are you doing in school?" The project team members must have some feedback loops to tell them how they are doing without waiting until something breaks or blows up!

What kind of feedback loops to monitor performance does your project have?

Performance Problem Flowchart

Here is a series of questions that will help you isolate the source of the project team member's performance problem. Use this series to make sure you have eliminated any possible reason why your employee does not perform.

Step	Possible Problem	Ask this…
Before you begin, ask yourself, "Is this issue worth pursuing?"		How do you know if it is worth pursuing?" (If it interferes with work, it is worth pursuing! If it is only a nuisance or aggravation, but does not interfere with work, it may be best to leave it alone.)
If worth pursuing, go to STEP #1. If not, you are done! Remember, you can stop anytime the problem is *"sufficiently solved."* (This means it is not worth the time, effort, or expense to "fix it better".)		
Step #1	Ask yourself, "Are my expectations clear?"	What do you ask your employee here? *I want to make sure I did a good job of explaining. Please tell me what you think I expect you to do.*
If that solves the performance problem, you're done. Otherwise, go to the next step.		
Step #2	Ask yourself, "Are the resources adequate?"	*What do you ask your employee here? Do you have everything you need to do what I expect?*
If that solves the performance problem, you're done. Otherwise, go to the next step.		
Step #3	Ask yourself, "Do they get fast and frequent feedback on their performance?"	*What do you ask your employee here?* *How do you know how you are doing?*
If that solves the performance problem, you're done. Otherwise, go to the next step.		
Step #4	Ask yourself, "Does the desired performance seem punishing?" (Hint: What do you usually do if they finish early and **others have not finished yet?)**	What do you ask your employee (or yourself about the situation) here? (If their "reward" for finishing early is you give them the work the slower people have not finished, you will soon have <u>no one</u> finishing early. You must praise the ones who finish early, let them know you documented their file that they finished ahead of the others, and ask if they will help the slower ones. This way they do not feel that the slackers are getting away with anything)
If that solves the performance problem, you're done. Otherwise, go to the next step.		

Step	Possible Problem	Ask this…
Step #5	Ask yourself, "Is poor performance rewarded somehow?" (Hint: What do you usually do if **they have not finished yet** but others have?)	What do you ask your employee (or yourself about the situation) here? *(This is the opposite of above. If they are behind, let them know you documented their file that they were behind and you asked a faster worker to help pick up their slack. This way, they realize they are not getting away with anything.)*
	If that solves the performance problem, you're done. Otherwise, go to the next step.	
Step #6	Ask yourself, "Is there any penalty for not doing it right?"	*What do you ask your employee (or yourself about the situation) here? "Is there any penalty for not doing it right?" (If there were no penalty, why would they stop doing it?)*
	If that solves the performance problem, you're done. Otherwise, go to the next step.	
Step #7	Ask yourself, "Is their non-performance a genuine skill deficiency?"	What do you ask your employee (or yourself about the situation) here? *Can they <u>not</u> do it at all? (If this is the problem train them.)* *Can they not do it very well?* (If this is the problem give them a chance to practice.) *Can they do it but just do not want to?* (If they can't give you a good reason for not doing it, give their job to someone who will do it.)
	If that solves the performance problem, you're done. Otherwise, go to the next step.	
Step #8	Ask yourself, "Can the task be made easier?"	What do you ask your employee here? *Can you think of any easier way you can do this?*
	If that solves the performance problem, you're done. Otherwise, go to the next step.	
Step #9	Ask yourself, "Are there any other obstacles?"	What do you ask your employee here? *"Can you think of any thing keeping you from doing this?"*
	If that solves the performance problem, you're done. Otherwise, go to the next step.	
Step #10	Ask yourself, "Does the person have the potential to change?"	What do you ask your employee here? *Do you have any plans to change your behavior?* (If they do, keep them, If not, terminate them.)

Have you noticed that every step, except #10, is a factor controlled by management?

This means there is a 90% probability that an employee's performance problem is caused by something controlled by management!

Inadequate Consequences or Rewards for Failure or Success (3.0%)

We touched on potential consequences or inadvertent behaviors from management that inhibit desired behavior in the **Performance Problem Flowchart** on the previous page and will not elaborate here.

However, we feel it's important to expand on what motivates employees and making sure we know how to extend the desired behavior when we see it from them. We will address those topics next.

The Five Components of Motivation

The more these components are present, the greater the motivation to perform.

1. **Tell me what you expect of me** in measurable terms (quality, quantity, time or **Q,Q,T**) that reduce the risk of my confusion.
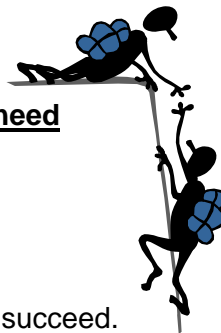
2. **Give me a chance to perform** (and learn from my mistakes, too.)

3. **Let me know how I am doing as I go along (**Remember the report cards you got in school every 6 weeks? You did not have to wait until the end of the year to learn if you had passed or failed the grade.)

4. **Give me help and guidance when I need   it.**

5. **Reward me** with pay or praise when I succeed.

Rewarding Feedback

Coaching starts with <u>CATCHING THE EMPLOYEES DOING WHAT YOU WANT THEM TO DO</u>. THEN ***REWARDING*** OR ***REINFORCING*** IT!

> You may have to look hard, with some employees, to find something positive to reinforce. They are like a campfire that is nearly out. All that remains is a small glowing ember.
>
> You have to gently fan the ember to nurture it back into a flicker of flame and then on to a roaring fire. Some people are the same way!

Think about your employees. Some do the right things all the time and you hope they continue.

Others do mostly right things and you wish they would change and do more right. List below two of your employees and their behaviors you want to see continued or changed. (The same employee may be in both situations.)

Employee	I want them to continue doing this...	I want them to start doing this…

There are tips on the next page for following up on what you have put into the box above.

> Getting people to STOP doing the wrong thing does not mean they will automatically START doing the right thing! They will only stop doing wrong things so you do not punish them.
>
> If you want them to do the right things, <u>you must make sure they know what right things are</u> and then praise them.
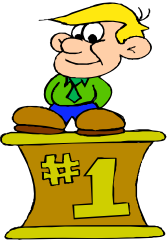>
> ### "YOU GET WHAT YOU REINFORCE."

What talent is available?

Think about your employees. Categorize them according to their performance on the job.

SUPER STARS	AVERAGE STARS	FALLING STARS
	  (Remember, this group can move either way. It depends on their leadership!)	
Get them involved with as much planning and decision making as possible	Build their confidence by increasing responsibilities.	Do any of these employees have traits that could be considered in the "super" or "average" category? If so, focus on positively reinforcing that trait as much as you can. They may respond positively and pull themselves up out of this category. If they have no traits in the "super" or "average", take them through the performance flow chart on page 36 for guidance to determine if anything is preventing them from performing like you want.
Delegate extensively AND DON'T MICRO-MANAGE!	Give frequent and accurate performance feedback.	
Encourage them to teach others when possible.	Encourage them to ask others they look up to (your super stars) for help when they need it.	
Help them develop themselves with presentation, speaking, and writing courses.	Teach them how to set small goals initially and gradually make the goals bigger or more aggressive.	
Let them fill in for you while you are out. (Individually or share your tasks among them.)	Catch them doing something right and praise it.	
Challenge them with goals "above and beyond" normal expectations.	WHAT ELSE?	
Celebrate their successes with them.		
Frequently tell them how proud you are of their development.		
Spend time with them asking for their thoughts on departmental challenges.		
Promote them (if they are seeking promotion). Do not hang on to them just because they make your life easy!		

Develop Performance Support Systems

We will review some key issues that can help develop a performance support system by asking some relevant questions:

If employees in your organization would like to know how well they are doing at work at any given time, how would they find out?

If an employee in your organization wanted to try some new ways of doing their existing work, what kind of support or encouragement would they typically receive?

How confident are you that every policy and procedure manual upon which your employees must rely is current, accurate, and <u>available easily to everyone that needs it?</u> (Are there inherent organizational obstacles that prevent employees from doing their best? Review the performance flowchart starting on page 36.)

Does your organization have a mentoring program that encourages employees with less experience to learn informally from more experienced ones without formal intervention of the organization?
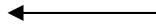
How often does your organization offer "refresher" training or informal "lunch-and-learn" sessions to help employees stay current with skills or knowledge that may not be used every day?
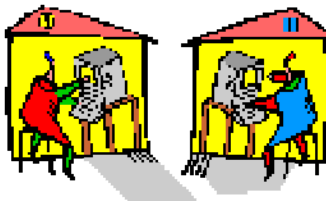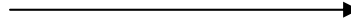
If employees make mistakes, what is the typical reaction of management?

Attack the offender **OR**

Find out what led to the problem

If a survey were conducted today of employees in your organization, how would they rate the quality and frequency of communication between levels? *(A sample survey is on the next page.)*

How would they rate the consistent application of organizational rules and regulations for everyone?

*Does your organization provide training to employees about how to analyze workflows looking for **measurable** opportunities for efficiency and improvement?* (A course called "Managing Productivity and Maximizing Profits" that teaches line employees and first-level supervisors how to do that is available on this website.)

A Sample Employee Job Satisfaction Survey

An anonymous survey about YOUR JOB at _____

Our management wants to see the workplace through the eyes our employees. This survey is designed to help them understand your viewpoint. Please be thoughtful as you help us make this a better place to work.

PART I: I am assigned to (Manager's name): _____

> Asking for the manager's name is <u>not</u> an attempt to figure out who responded to the survey but a way to discover areas where things are good and where they need improvement.

PART II: RATE YOUR AGREEMENT WITH THESE CONDITIONS

Use any number from 1 to 10 that represents your feeling!

1 (disagree very much) **2-3** (disagree some) **4-5** (maybe not) **6-7** (maybe so)…

8-9 (agree some) **10** (agree very much)

Typical Job Conditions	Your Rating
I am appreciated for the work that I do.	1 2 3 4 5 6 7 8 9 10
I am kept informed about what is going on in the company.	1 2 3 4 5 6 7 8 9 10
I get appropriate help on work related problems.	1 2 3 4 5 6 7 8 9 10
I receive on-going training to expand my professional skills.	1 2 3 4 5 6 7 8 9 10
I earn a fair salary and benefits in exchange for my work.	1 2 3 4 5 6 7 8 9 10
I do work that keeps me interested.	1 2 3 4 5 6 7 8 9 10
Opportunities are available so I can meet my career objectives.	1 2 3 4 5 6 7 8 9 10
Management keeps private any information I may share in confidence.	1 2 3 4 5 6 7 8 9 10
The work environment is clean and safe.	1 2 3 4 5 6 7 8 9 10
The work requirements are enforced in a fair, consistent, and confidential manner.	1 2 3 4 5 6 7 8 9 10
The person to whom I report tells me what he/she expects of me in <u>measurable</u> terms (measurable terms include examples of "HOW MUCH", "HOW GOOD", "BY WHEN").	1 2 3 4 5 6 7 8 9 10
The person to whom I report gives me a chance to perform	1 2 3 4 5 6 7 8 9 10
The person to whom I report frequently lets me know how I am doing.	1 2 3 4 5 6 7 8 9 10

> Note: This simple question is an excellent way to learn the extent of employee satisfaction with the organization.

"Would you recommend our company as a place to work for a friend looking for a job?"

Yes ___ (why) No ___ (why) No Opinion ___

Inadequate Performance Monitoring (3.0%)

We touched a little on this topic in the last section entitled *Develop Performance Support Systems* (page 41) where we encourage the use of metrics as much as possible in all functional positions.   Also, please go back and review *Additional Critical Questions* on page 19. After all, if you don't know where you are in a quantifiable fashion, how can you tell if you are making progress getting to where you want to be?

Four questions that each project group leader and as many team members as possible should be able to answer without hesitation and ambiguity are these:

1. "What resources do I control to accomplish my tasks?"
2. "What measures will be used to evaluate my performance?"
3. "Who do I need to interact with and influence to achieve my goals?"
4. "How much support can I expect when I reach out to others for help?"

Make sure that each group leader and team member answers these four critical questions **and then gets them verified by their reference.**

For example, question #1 asks, *"What resources do I control to accomplish my tasks?"* Let's suppose the person answers, *"I have resources A, B, and C to accomplish my tasks."* But, upon your checking with someone else who may be involved, you discover that resource C is no longer available. Resource C (or the lack of it if needed) is a potential project performance problem. If you cannot rely on having resource C available, what is your alternative plan?

It is much wiser to have these four questions asked and answered by all key project team members before the project begins than to have to improvise as you go along.

---

[i] Deborah J. Mitchell, Wharton School; Jay Russo, Cornell, and Nancy Pennington, University of Colorado