Transforming Technical Leads into Effective Project Managers

Presented by Rita Hadden
Key Challenges

- Large IT organization: explosive growth, costs escalating at 30% per annum
- Need to respond to rapid growth in volume & complexity of financial markets
- Expand regulatory reach & improve regulatory performance
- Operational service level agreements plummeted to substandard (90% availability)
- Delivery of new software functionality halted; 100% failure rate for largest software projects.
The Transformation

- Tackled many fronts using subject matter experts, involved & inspired leaders and mentors, and constantly communicated vision

- Tonight: *touch* on related key problems, but *focus* on transformation of technical leads into effective project managers.
Requirements, not War & Peace

Goal
Rapid delivery of valuable functionality

Problem
Requirements development with low-skill business users, years of feature starvation, long & dark periods of requirements development that result in multi-hundred page “shall statements” that are effectively not implementable.

Solution

<table>
<thead>
<tr>
<th>Establish technical requirements practice</th>
<th>Start to measure requirements volatility and other metrics</th>
<th>Inject strong technical analysts</th>
<th>Shift to collaborative requirements capture (SME + expert)</th>
<th>Reduce iteration time from quarterly to monthly (and even weekly)</th>
<th>Shift to just-in-time requirement details, and iteration demos</th>
</tr>
</thead>
</table>


Iterative Delivery Stymied by Operational Model

**Goal**
Iterative development to manage risk + show value often

**Problem**
Iterative development demands many, fast deploys, additional environments, but operational environment is used to long lead times, few deploys

**Solution**

<table>
<thead>
<tr>
<th>Consolidate SCM function, establish standard tooling</th>
<th>Automate build</th>
<th>Virtualize dev lab &amp; automate provisioning</th>
<th>Automate deployment</th>
<th>Project teams change from 45-50% ops support to &lt;10%; time to deploy from weeks to hours, time to provision from months to days</th>
</tr>
</thead>
</table>
## Driving Predictability with Risk Management

**Goal**  
Reliable delivery on schedule

**Problem**  
Late breaking news derailing delivery dates + schedules

**Solution**

<table>
<thead>
<tr>
<th>Recognize poor risk management practices</th>
<th>Establish consistent approach for identifying and mitigating risks, issues and dependencies</th>
<th>Train and coach directors</th>
<th>Train and coach project managers</th>
</tr>
</thead>
</table>
Rapid Growth, Staffing Quality

**Goal**
Support *substantial* new demand, requires new staff

**Problem**
Rapid hiring often *degrades* skills & takes much time from delivery teams

**Solution**

| Organize in loose, functional matrix structure | Each functional area headed by practice manager responsible for staffing, performance management and best-practice development | Operational management still province of PM | Hiring moves from one to five points of hiring, with *sustained quality*, decreased time to fill and time for sleep |
Reporting Coherency from Chaos

Goal
100+ projects at any given point in time, need effective reporting

Problem
Each PM reports on Friday afternoon whatever is top of mind; no consistency in language, level of detail, prominence

Solution

| Recognize reporting is an emergent property of sound project management | Identify seven categories of information in a project plan (scope, customer, schedule, budget, staff, technical, process) | Capture baseline in plan | Report the plan and deviation using standard project management meta-templates | Teach, cajole, mentor, review ruthlessly | Automate collection with dashboard | Provide universal visibility |
# Project Management Discipline

## Goal
Sound project management discipline

## Problem
Fast growing organization with knowledgeable tech leads; but little project management experience

## Solution

<table>
<thead>
<tr>
<th>Define 6 core PM skills</th>
<th>Devise meta-templates for each of these skills</th>
<th>Set up internal training programs to roll out adoption</th>
<th>Coach/mentee office hours for less-experienced + new</th>
<th>One-on-One coaching as needed</th>
<th>Weekly all-program reviews</th>
<th>Career progression defined</th>
</tr>
</thead>
</table>

Weekly all-program reviews

Career progression defined
How did we do it?

Started with a *dashboard* that provided transparency and consistency for:

- Project planning & tracking
- Requirements & scope management
- Iterative development
- Risk management
- Project/Program status reporting
- Staffing and hiring practices.
Project Dashboard Key Features

- 6 standard project management (PM) artifacts
- At-a-glance project summary
- Drill-down to project details & development metrics
- Drill-down to program/project financials
- Management and risk reports
- Role-based security
Key Enablers for Adoption

• Accessible anywhere, anytime
• Intuitive site navigation
• Leveraged standard PM artifacts: lightweight overhead to comply
• User cheat sheets and templates
• Easy to get support.
## At-a-glance Project Summary Screen

### Project Summary

<table>
<thead>
<tr>
<th>Project Name</th>
<th>Project Lead</th>
<th>Sched.</th>
<th>Budg.</th>
<th>Risks</th>
<th>Release</th>
<th>Intractions</th>
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<td>PUR07000304</td>
<td>FB</td>
<td>Computech</td>
<td>12/31/10</td>
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</table>
Project Detail Screen

- Project charter
- Financials
- Release and iteration schedule
- Project staffing
Project Detail Screen (2)

### KEY RISKS
(Updated 12/28/10)

<table>
<thead>
<tr>
<th>Description</th>
<th>Mitigation</th>
<th>Comment</th>
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<th>I</th>
<th>Owner</th>
<th>Target Date</th>
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<td>H</td>
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<td>Decere dissentiet no sit, ea iure</td>
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<td>Eu impetu iracundia moderatius ei nec patronque, maxim est, id cum labitur</td>
<td>Ex quaestio epicuri incident per principes</td>
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### NOTABLE EVENTS THIS WEEK
(Updated 12/30/10)

- Supported the FCC Spectrum Dashboard application for updates to links and navigation
- Completed initial wireframes to accommodate design changes needed to include leases
- Continued to provide production support

### GOALS FOR NEXT WEEK

- Continue production support
- Complete development and testing for identified browser issues
- Complete analysis and mockup designs to include leases
- Complete the development of layers and results screens and provide TV contour files for FCC testing
Resistance to change from Tech Leads?

- Ranges from disbelief of having to create 6 standard PM artifacts for each project, to ignoring the need to add projects to the dashboard
- Fear of transparency, increased burden
- Competing priorities.
Critical Success Factors

Org leaders created *climate* where change could succeed:

- Communicated the change effort continuously and WIIFY
- Demonstrated *sustained* active involvement
- Emphasized role modeling and coaching
- Made the NEW easier than the OLD
- Change was not optional
- Demonstrated ownership and belief in the change
- Recognized & rewarded improvements
- Stayed the course for the long term.
Change in 9 months

• Short transition from dashboard rollout to adoption (1 month)
• Ongoing role modeling, mentoring, and support (PGM Mgrs, SMEs, VP)
• Got knowledge workers to self-engage and take ownership
• Coaching through weekly project reviews
• Buy-in from top down and bottom up
• PM best practices and use of dashboard became “the way you do things around here”.
The Results

• ORG expanded business lines, executed successful substantial merger, handled increased business volume
• Near perfect record of on-budget, on-time, as-expected delivery of high-value software projects over many years
• Increased agility, consistency, predictability, effectiveness.
The Results (2)

• Just-in-time requirement details and weekly iteration demos (no 250+pages, 18-month requir. doc)
• Project teams changed from 45-50% ops support to <10%; Time to deploy from weeks to *hours*; Time to provision from months to *days*
• Reporting coherency from chaos
• Hiring quality and speed increased 5 fold.
For questions and information, contact:

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