

Success in Project Management Consulting

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Executive Summary

Consulting in project management is hard work! In whatever capacity one may be engaged on, whether establishing a Project Management Office, implementing a centralised program governance framework or designing tools and templates, the premise is the same – you may be the lone voice among many.

Day one arrives and feelings of excitement of entering new challenges with preconceived ideas entrenched within you from your years of experience are pooled with a nervous anticipation of the unknown. As you leave the safe project management knowledge thick walls of the base office and enter into the unfamiliar organisation, polar opposites may be realised. One key hurdle to overcome is the shift from operations to an alternative mindset and a different way of thinking; potentially tripling effort in implementing an atypical approach when working with organisations young in project knowledge.

Effective project management is not something that is innate in organisation elaboration and requires a specialised and focused effort from project practitioners. Organisational leaders look to optimise their project performance and architecture by leveraging off the wider practices of the consultant project manager to swiftly and precisely equip their organisations with bespoke methodology. While this is a sound approach, the path the consultant walks through the engagement life cycle is crucial in meeting expectations and retaining business sustainability well after the engagement term has ended. This tactic can noticeably differ from one organisation to the next and will largely be determined by touch and feel and a dexterous ability in the consultant to 'read' stakeholder and organisation agendas and capabilities.

From the consultant's viewpoint, this paper explores collegiate and inclusive approaches in defining and uniting capability within the organisation and in empowering its people. It also suggests some coping strategies that consultant may employ in painting a new holistic approach, stroke by stroke.

Introduction

Today specialised consultants have a large part of play in delivering transformation to business. Figures upwards of 80 percent external consultants over internal staff are not uncommon in large organisational change initiatives. Consultants are embedded in delivering an approach that enables a path for change. This approach is typically around this growing beast we like to call project management. Traditionally, dexterity in project management does not reside within the organisational staffs' standard skill set, as full-timers can typically be hired for their affinity with particular processes, leadership or business aptitude. So without upsetting balance or overloading existing employees, decision-makers look to external expertise of specialist project management consultants to provide advice and methods on running their transformation programs.

Project management itself is simply a tool presenting structured core fundamentals for producing and measuring change and can remove subjectivity from delivery. As a consultant it is important to realise that there is a phased approach within a phased approach. Regardless of what phase the project is in, the consultant must follow the rules of engagement and begin at the start. To this end, this report shall use the phased Rational Unified Process (RUP) methodology developed by IBM (2002) (Fig 1) and also suggest ten Action Points (APs) for achieving success. Focus is on the consultant (you) approach within the project life cycle, regardless of the stage of the project to what you are entering. Deciphering your APs can quickly distinguish your role. It is important that you get up to speed as rapidly as possible – you are expensive and the clock is ticking!

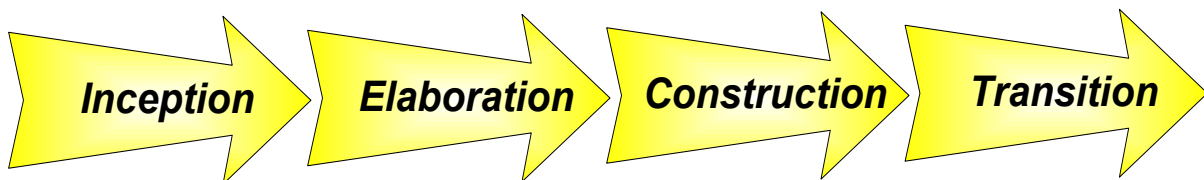


Fig.1. Rational Unified Process (RUP) model (IBM 2002)

Day One

For some 'the bench' (or 'the beach') can be a welcome break between engagements to recoup energy and thinking. As you roll off a project the project-management-thick walls of the home office can provide time to reflect in an environment rich with experience and curiosity. However, it is not long before life on the bench is anything but like the beach as one begins to miss the excitement and anticipation of starting that new role.



Finally day one of the new job arrives! Contract details have yet to be signed off and project scope is loose but you're going in! Hopefully you have done your pre-start research on the company and are armed with a proletarian knowledge at best. Your first day in most cases will be the biggest. It is where you start the client believing that you have something special to offer and that you also deserve day two!

Feelings vary greatly from person to person but generally encompass varying levels of fear, nervousness, over confidence and an absolute understanding of what you are about to get yourself into. No cause for worry at this stage, it will all be completely different, guaranteed!

You arrive at the client site and are seated at a desk in the corner out of the way of the real workers. You begin to come to the realisation that the people that have engaged your services are not the ones who you shall be working with and everything has been going along just fine without you, thank you very much! Nonetheless you have a job to do, scope will become clear and they will most probably thank you later (they just don't know why yet).

AP #1: Read and research

On the inside you most probably have access to internal files, project papers, organisational charts and surrounding business documentation. Get your head into this and start contextualising the environment you are in. Look at the business vision, goals, processes, touted and favoured project methodologies that will give substance and backing to your means. This will help shape your approach to project management. Be aware of hierarchy and communication channels. No matter if you are in a government department, a financial institution or an ICT project, politics lives. Some naive consultants talk about escaping the company politics because they are external. This is a dangerous premise as being successful in consulting means not only working within the client governance structure, but if you are with a firm, also that of the home office.

AP #2: Define and connect with your project stakeholder clusters

Research is essential but you will also need to get out there and make your presence known. Morning tea break is a great opportunity to catch people around you in the kitchen. Introduce yourself and less-intrusively discover who will be your critical friends. This is also a good informal opportunity for selling the reason why you are here and to entice interest in others. Once you have a list of stakeholders, organise them into a something like a RACI (**R**esponsible, **A**ccountable, **C**onsulted, **I**nformed) (Value Based Management 2007) matrix categorised against tasks (Fig 2).

	Vendors	Customers	Community	General Manager	Project Manager	Program Manager	Business Sponsor	Line Managers	Focus Group	PMO	ICT	OH&S	Legal Services	Human Resources	Finance	External Relations	All Staff	Business Analyst	SME	EA	Project Alpha	Project Beta	
Project Outcome A																							
Output A1																							
task				I	RA			C	R		C			C				R		C		C	
task					RA				R		C			C		C		R		C		C	
milestone	I	I	I	I	A	R	RA	A		I	I	I	I	I		I	I	R		I		I	
Output A2																							
task				C	RA						R	C	C			C	C		R				
milestone	I	C	I	C	R	A	RA	I	C		R	I	I			I	I		R				
task					RA					R								C				C	
task					RA					R								C				C	
milestone	I	C	I	C	R	A	RA	I	I	R	I	I	I			I	I	I				I	
Output A3																							
task				I	RA				C	C					C		R			C			
milestone		I		I	A	A	RA	A	I	I					I		I			I		I	

Fig.2. Sample Stakeholder Engagement matrix (RACI)

At this early stage your task list will most probably be at a fairly high altitude and in terms of project outcomes or outputs. That's okay – as this list grows and you get down out of the clouds and into the dirt as it morphs into your Work Breakdown Structure (WBS) and ultimately a project schedule.

Once you are content you have captured the main players (don't try for everyone on the first pass, remember it's still day one), it is important to workout when you need to engage them in to process. Your ability to affect the project outcomes will be most influential in the early stages of its life so providing that is where the project is at, that is when you need to act. If the project is passed the initial phase, you have some catching up to do. With time and a few successes, your influence will increase. Meeting the right people is critical.

AP #3: Develop and present your first day deliverable

After connecting with as many people as possible to who are connected to your project and squeezing as much data out of them as one can in a day, you should have enough information to put something down on paper that you could take back to the project sponsor. This serves as a sanity check for you and also can show the sponsor the discovery work you have completed within you first day.

A good way to show this collection of data is pictorially in a simple diagram such as a Product Breakdown Structure (OCG 2002) (Fig 3).

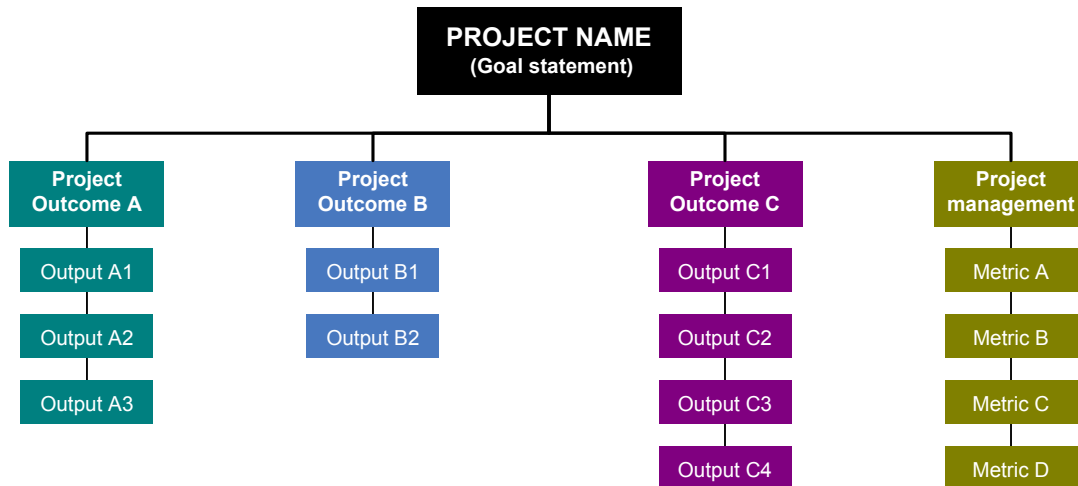


Fig.3. Sample Product Breakdown Structure (PBS)

A PBS shows the products within the project. It can also show project management enablers. The product methodology is a Prince2 (OGC 2002) term used to describe the tangible and intangible components that the project must create or change. These can include such events as strategy documents, building machinery and changing culture and approaches.

At the end of your first day you may have more project breadth than depth and a PBS can be the tool to articulate this. You may have to use the Force a little here and some artistic license but remember this is an informal check-in with your sponsor, not a solution. Regardless of your experience and enthusiasm, you will not be able to define the ideal solution on day one.

The nod from your sponsor is the key to the gate to your *Elaboration* phase.

You are on board, parachute attached and the plane has taken off...

Defining Your Approach



To move yourself into this phase you must be beginning to see your purpose. Now you will have gained some exposure with your team and should concentrate on *partially* assimilating with the organisational culture and processes. This means generally doing things by the book and knowing which rules can be bent in your favour if need be. *Be* part of your team and establish rapport by being genuinely personable, social, have a high EQ or Emotional Quotient (Cairns 2001) and a flexible agenda. Lightening the mood can make heavy work lighter.

As word gets around to why you are here, you may experience negativity from your team in the form of avoidance, cries of unnecessary bureaucracy and affirmations of statements like “things have worked fine without it so why should we...” You are probably already seeing why these processes are not working. This is typically why organisations bring in specialist project managers to strengthen project systems and engender interest and value for users.

AP #4: Balance project management with change management

This somewhat intangible but clearly distinguishable change approach builds the foundation on what your project will be delivered and depending upon your engagement, ‘project management’ can mean either ‘delivering a project’ or ‘delivering a project *and* building project management governance at the same time’. Are they building the plane while it’s flying? This is where your change management ability will carry you through. Every project is a vehicle for change – thus should every project be accompanied in parallel by change management processes that are directly proportional in magnitude.

In your approach to implementing change, you must understand where the organisation is at in terms of project management and acknowledge that the way it worked for you last time, may not work again in a different environment. You must feel their pain and understand the resistance. Switch roles, would it be different for you? Now you have informed choice. Advance with your team’s perspective and introduce change management techniques like:

- ▲ **Demonstrate the value that project management can bring to their world**
Articulating the value proposition of project management processes is crucial to your success as a project manager and in enabling a sustainable outcome. This could include such campaigning activities as presentations of industry methodology in action at your client site, success stories from similar organisations, improved time management through a project schedule, documentation providing a clear scope definitions and outcomes, defined accountability and ownership of issue and risk management processes and vision of achievements by their senior managers or sponsors.
- ▲ **Regularly communicate and engage**
Through a formal communication and engagement plan, project decisions and milestones are communicated to stakeholders through predefined channels and timing. Look to your RACI matrix for communication points and to the business for normal channels.

^ **Support users with the new project tools**

Typical project tools can include issue and risk spreadsheets, project schedules, status performance reports, business cases, project management plans, stakeholder matrices, quality plans, communication templates and lessons learned documents. While some of these products serve as a roadmap for defining the project journey, others are ongoing such as the issue and risk spreadsheets and project schedule will require the most attention in maintaining accuracy and reality. Sit with your team and show them how.

^ **Define where your project stakeholders are at in the change process**

In any change there will be a main group who are undecided on what they should do. Others will resist, stamp their feet and hold their breath. Then there are those who just can't wait to get into it. Enlist the latter group as champions to bring on the undecided. Focus on the undecided to ensure the resisters are on board before they pass out.

^ **Be inclusive**

Remember you are working in a short term capacity for the client. "Short term" means that you don't have much time. Your approach will become theirs and you must sell it well. It is detrimental to push a project system into an organisation from up your sleeve. You must work along side your project team in developing a system that works for them and within their business. Being inclusive and bringing your team along for the ride down that rocky road of twists and turns will allow you to develop a unique system that all uses can own, value and feel a part of.

To pull this all together, your methods in articulating this value will vary from client to client but you *must* show your Spiritual Quotient (SQ) (Cairns 2002). That is, be a passionate advocate for your cause, an inspirational guide, a change agent with purpose – you must be the ball! Surprisingly, little support at this stage is not abnormal. That's okay. In fact the struggle will most probably continue throughout the entire project! That's okay too. People just need time to adjust to the new world order. Allow them this time.

Remember you have an advantage. The business who hired you views project management as part of their future. Resistance will become harder and users will realise this also and you may find new friends among the team. Those who do not will get left behind.

[AP #5: Demonstrate how project management will make them look good](#)

This is a powerful wild card to play. Central to your success is to ensure, beyond all reasonable doubt, that project management will make your project stakeholders look good to their management. Nothing will please their management and the bean counters more than a succinct structured architecture for delivering a project into business as usual that encompasses all facets of time, cost, risk and quality – all standard project metrics.

People may now be appreciating your existence; get yourself to the *construction* phase.

You have reached altitude; you peer out the open doorway... now jump!

Building Business Value

By now your stakeholders should have an appreciation of what is expected of them in their project role and how you can enable them to fulfil it. In this phase products and features are to be developed.



This will be where you will start to see some fruit of your labour. It is very important that you have built and advertised your approach by this stage so your stakeholders know the path that they are to walk. An anonymous quote, “In absence of a clearly defined strategy, people become strangely loyal to daily acts of trivia” comes to mind. At this point it is also equally important that your client agrees with your proposed approach.

AP #6: Obtain business endorsement of your new approach

You cannot move ahead without the support of your Business Sponsor. They have the power and influence to make or break your plan, so don't get ahead of yourself. You may have the best and most innovative approach all planned out but it is the client that has to buy it.

In selling your approach you must understand the environment you are in, capability and the mental models of your stakeholders. It requires skill in powers of deduction to understand stakeholder Values, Assumptions, Beliefs and Expectations (VABES) (Clawson 2003) within a short time frame. Nonetheless this is what you must endeavour to do. In seeking a sale and longevity of your approach you must have already performed various critical analyses of your own approach. Is this right for this organisation? Your task is not to put down and point out flaws - that's easy. Rather, seek to understand where they came from and respectfully advise on potential augmentations.

AP #7: Communicate, collaborate and support

▲ **Communication**

Communication is number one on your list of priorities and an integral part of your parallel change management process. Remember project management is just a tool. It is perceived in numerous different lights and one of them being an unnecessary layer of bureaucracy. It is your challenge to keep this inference away from your team. Do this by practicing deep listening when they speak and act. Keep stakeholders on the right path through the project evolution by keeping them in the know.

▲ **Collaboration**

Involve your teams in building project methodology, tools, templates and processes. In reality you will probably be the one creating the project metrics. These generally will include issue and risk registers, project schedules and timelines and status report templates. In fact that is why you are there. Collaborate by taking your draft document to the team for comment and seek assurance that you are on the right track and that tools could be effectual.

^ **Support**

Supporting your project team through every step is paramount to delivery. Think back to where they are all in the journey - excited, undecided or still resisting? Work with your teams in using the metrics, give praise and show how the work value that they are doing informs other business and project outcomes.

With communication and collaboration underpinned by support, an environment for project learning is provided (Fig 4). This can be a by-product of the cause and realised through team self-motivation, the application of relevant knowledge and supporting those through the clumsy nature of new learning.

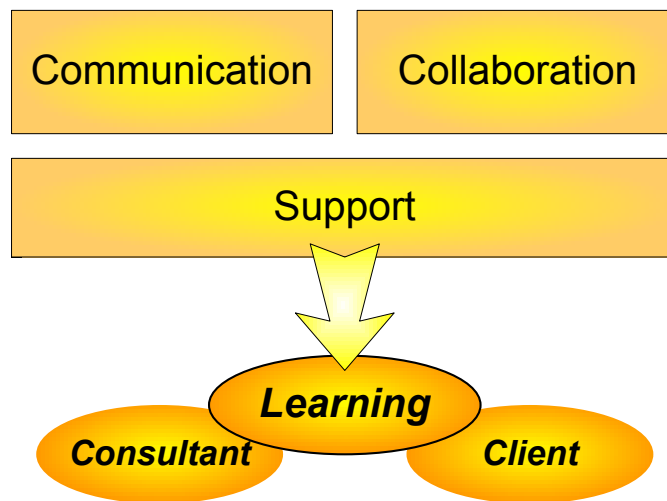


Fig4. Project Learning Environment

Within this phase, consider and be open to modifying your approach. Evolution of the client-consultant partnership will give you an altered perspective which may not be the one who started out with. You are also going through a learning exercise and possessing humility within yourself will assist the growth of your own service offering. You can then take this learning and continuous improvement model to your future engagements.

Once your project system is up and running, move to *transition*.

Your chute opens! Battling cross winds you aim for your landing target

Sustainability and Longevity

Through this journey that you have taken the client on, you should be critiquing yourself and your methods the whole way through to ensure they are effective. Your work is now most definitely in the eyes of the organisation and available for comment and critique by end users.



This is a potentially tense time for you where your value will be exposed. This is not a time for fear but one of confidence. If you have followed the structured path and integrated with your team, then they may support you as you have supported them (hopefully).

AP #8: Implement achievable and sustainable solutions

Finally you may go into 'solution mode'! The end of this phase does not necessarily mean end of project. Your project start date and end date are undetermined. It is about realising a point of clarity that you may have reached and given to your team (Fig 5).

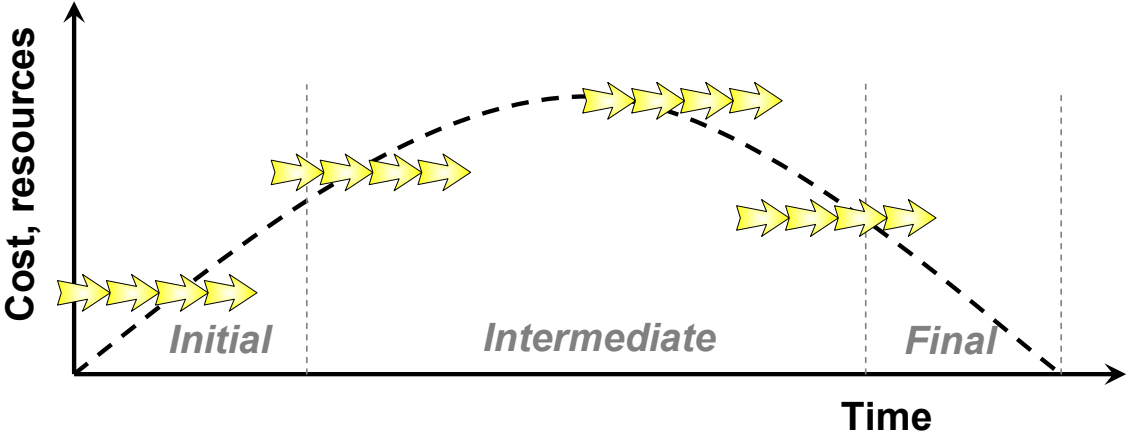


Fig 5. Project lifecycle versus the Consultant lifecycle (Adapted from PMBoK 2004)

Your worth is apparent now and your work is without unwanted complexity. All stakeholders have been discovered and you have connected with them. Your issue and risk spreadsheets are being used and standards for management as being followed. Project schedules are built and tracking against a baseline. You are influencing the business in buying into project management theory and practice.

AP #9: Ensure ongoing business value from project management

As you have achieved your goal, sadly your time with this client is running out. Your work should focus on making yourself redundant and passing on the intellectual property and fruits of your labour to the business users.

Creating sustainable value is not just about making people feel the work they're doing is valued, its also about ensuring the people themselves are valued and respected, leading to them being more responsive. So next time they are asked to do something that may be beyond their usual job description (i.e. project management), they may remember the appreciation you showed them and be more receptive. This can also forge relationships that may turn into opportunities.

This is a good note on which to leave your client with recommendations on ways forward... with your business card strategically placed!

*With confidence and two feet forward... touch
down! Well done, you survived!*

The Final Word

Winston Churchill (1941) said “We shape our buildings and then our buildings shape us”. Your project approach will influence the business and in turn the business will form and make original their final project management culture. This is an equal partnership where you and the organisation grow together. A higher level of uniqueness and tailoring of your approach can directly relate to systems sustainability and longevity past your engagement.

AP #10: Recognise your value

There are numerous measures for performance success in project management, with myopia providing the obvious ‘on time and on budget’. Throughout the engagement you have most probably given a unique level of understanding to business stakeholders in a new mindset and way for organising and managing effort. The ultimate compliment of your endeavours is that you will have most likely given people experiences, concepts and tools at a personal level that they can take to other areas of business and life. If you have achieved this they will look to you for advice and mentorship and guidance. While your value within the engagement lifecycle fluctuates, it peaks in this final stage when this is realised.

It is not an easy path educating crystallised businesses in new approaches. You may meet blockers everywhere, herein lays your challenge. Grow each role to what it needs to be. You will get return on what you have invested with the client in both tangible and intangible reward. Skill in applying knowledge, flexibility, leadership, thick skin, openness and all the ‘Qs’ (IQ, EQ, SQ) (Cairns 2002) are all hallmarks of a great project manager. Bruce Lee (1972) said “when you put water into a teapot and becomes the teapot...be water my friends”. Applied here, you must mimic the form and shape of the client organisation to be successful.

In following these simple APs (that may vary depending upon your scope) you will affirm the value you have sold the client and can leave with a positive degree of experience and learning. Every stroke of your brush brings the client forward in completing their project management masterpiece. If you are a good artist, they may never want to let you go.

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