



HOW HEALTHY IS YOUR PROJECT ?

Chaired by Tom Halliwell (Roche Products Ltd.)

Introduction

This meeting saw the introduction of a new format – with an afternoon workshop on Day 1 preceding the main meeting on Day 2. There is a move to make the content of the meeting more interactive with less time allocated to speakers. The interactive sessions will benefit from the participation of ‘expert witnesses’ – experienced Project Managers who can dispense wisdom and stimulate discussion.

The overall theme of the meeting was **Health**.

The Day1 workshop, led by John Faulkes, examined Team Behaviours – a concept central to the healthy conduct of a project.

As busy professionals in a demanding environment, Health includes your own Work/Lifestyle balance as well as the ‘health’ of your projects. Starting Day2, our visiting speaker was John Neal, a psycho-physiologist with a world-class experience in motivating sports-people and business-people to improve their performance without losing sight of the need to take care of their health.

The major interactive session on Day2 invited delegates to discuss the broad range of processes and activities that need to be monitored if your project is to realise its full potential – The Project Healthcheck.

PIPMG Website

The website has been improved and extended. It provides a background to PIPMG, documentation from the meetings and a valuable new resource – the Learning & Development Centre. Take a good look at the site, bookmark it and visit it often – www.pipmg.org.uk

Team Behaviours Workshop

John Faulkes (Team Communications)

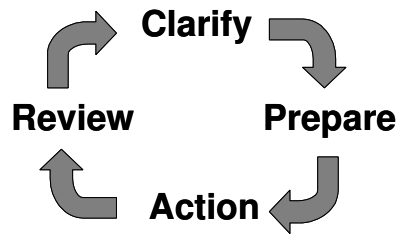
Project Teams often find it difficult to reach rational consensus decisions - the team members may have widely different viewpoints & perspectives. In this workshop, a case study formed the framework for syndicate discussions that explored the stages in forming a team and devising a process to reach a consensus.

The first principles to be established were as follows :

- The team must be built on an understanding of individual characteristics - with a clear definition of roles and responsibilities.
- It is important to value the differences between team members - that result from their background, experience and personality-types
- A team leader should ensure that each voice is heard.
- Most team members can benefit from supportive development (ask questions and build on ideas or criticise in a rational way).
- Ineffective behaviours need to be challenged.

A systematic approach to decision-making is essential.

Almost all tasks and decisions involve the four main stages illustrated opposite and the stages can be broken down into a continuous sequence of activity.



Clarification includes defining the objectives and the measures of success.

Preparation involves :

- planning the process
- considering the views of all stakeholders
- gathering the necessary information

Taking **Action** involves :

- analysis and decision-making (may include risk analysis & presenting recommendations to decision-makers)
- planning the implementation

(In this case-study the action was the decision itself but action may of course include actual development work)

Reviewing the outcomes and the process complete the cycle – which can be repeated as further decisions become necessary.

This approach to decision-making harnesses all the talent within the team, avoids overlooking key aspects of the problem and, by the sense of involvement, enables true consensus and commitment to the outcome.

Organisations have their part to play by creating an environment in which teams are empowered to make good decisions.

[John's slide set can be viewed here](#)

Work & Lifestyle Balance – how healthy are you ?

John Neal (Ashridge Management College & Neal Training)

Over the last 40 years, Sport and Fitness have had an unprecedented marketing opportunity - receiving government funding, being an obligatory part of the school curriculum, and providing a constant stream of high-profile role-models. Yet, still only 7% of the UK population take enough exercise to keep themselves healthy. This probably results from our perception of sport as a 'no-pain-no-gain' activity and unpleasant memories of school trainers (both kinds). We can easily be persuaded to participate in a 'soft-ball' game and like the idea of a personal trainer, but are quickly put off by fear of a hard ball and 'fitness terrorists.'

A positive attitude to a target or goal can work wonders : The seemingly impossible first 4-minute mile was followed within 6 months by 104 further successful attempts. Conversely, the stress that results from our animal responses to fear of failure or humiliation works in direct opposition to potential success by redirecting bloodflow away from our brain. In stressful situations, where you want to perform at your best, memory and ability to think can be reduced by up to 80%.

Many companies have a mission statement that places people as their most valuable resource but fail to follow-through by protecting and optimising their employees' health & performance. How many Company Boards have a 'Lifestyle Director' sitting alongside the Financial Controller ? ...yet there is good evidence that absences from work can be reduced by 80% by a simple back-care regime and that US health insurance payouts are 45% less for individuals that exercise compared with their more sedentary peers.

How is this highly desirable shift in lifestyle to be achieved ? Traditionally, we set ourselves rules & targets for weight loss or athletic performance and measure our progress at intervals. The high level of repeat business for weight-loss clubs suggests that this essentially left-brained approach doesn't lead to a lasting improvement.

The right-brained approach is based on personal principles, trust & faith rather than rules laid down by someone else. It requires vision and a pro-active approach. Set a 'SMART' 30-day goal and check that your lifestyle choices support its achievement. Take affirmative action – make a contract with yourself (decide how and when the goal will be achieved) – and develop a persistent positive mental attitude.

Project Healthcheck - Interactive sessions

Stephen Allport, Kevin Bilyard, Les Rose & Ralph White

The over-riding message from this marathon session was... Don't leave project review until the end of the project ! A project healthcheck is very likely to turn up some aspect of your process that is in need of care & attention. Failure to take action can lead to :

- Lost or damaged commercial success
- Failure to meet technical specifications
- Loss of shared vision or central focus on projects or process
- Disappointed Sponsors and Demotivated teams
- Time or Cost over-runs

So be warned !

The main healthcheck questions are shown below. The subsidiary questions posed by the facilitators, together with extensive contributions from syndicate groups and expert witnesses, are shown in Appendix A.

1. Who wants this Project and is there a justifiable business case?
2. Is there a Project Leader and is there a Team?
3. Is there a Project Plan and a Budget?
4. Does the Project want to Make or Buy?
5. What are the Project Metrics?
6. Have contingency plans been drawn up to aid risk and issue management?
7. Is there attentive Management Review?
8. How do you manage interim review and closure?

Phil Dolamore 2nd June 2003

Appendix A – Interactive Sessions Project Healthcheck

1. Who wants this Project and is there a justifiable business case ?

Are senior managers aware of the work? How do they make their presence felt? Who are your Sponsors?

Is there documentation that captures the scientific essence of the proposed product?

Is there documentation that captures the commercial essence of the proposed product? Is it likely to be successful in the market place?

How does the Project stack up against all the other work you are doing? How are priorities established to help you overcome conflicting demands on your time?

- How has the legitimacy of the project been established ?
- Identify a Champion and a Sponsor (may be internal or external)
- Document the Product Vision – Medical need & Commercial potential
- Target Product Profile (TPP) expressed in quantitative terms (“X% better than Y”)
- Understand the Scientific Rationale (Essence) & the rationale for selection-decisions
- Conduct Health-outcomes research & assess technical feasibility
- Local champions or sponsors may ignore global market needs
- Clarify Project Prioritisation (Lines & Teams need to agree on resource allocation)
- PM and peers need to maintain a broad view of Portfolio
- Scope of a project should be controlled in terms of time, resource & budget
- Leave room for ‘skunk-works’ which can be a valuable source of creativity
- Queuing theory shows that systems loaded above 80% are prone to grid-lock
- Avoid mis-alignment of information, resources & competencies

2. Is there a Project Leader and is there a Team?

Who is running the Project on a day-to-day basis?

Is the Project Leader actually in charge, or is it really line management?

Or is the Project coordinated by staff mainly interested in status reports about time, costs and risks?

Does everyone turn up for Project Team meetings or is there a separation of the strategic (core) activities from the operational (functional) tasks?

- Clarify roles & accountabilities at the outset of the Project
- Senior Management (Investor promises, Ultimate arbiters of high profile issues)
- Champion (Influential Advocate for the team & project’s priority)
- Sponsor (Group or Individual, Internal or External - more critical than Champion)
- Project Leader (“Big Picture” - links sponsors, team, & senior line management)
- Project Manager (day-to-day running of the project - “What & When”)
- Ideally, PM is empowered & accountable for delivery on Budget, Schedule & TPP
- Ideally, PL & PM should select & appraise the team - working with Line Management
- Line Management (provide specific expertise & resource “Who & How”)
- Line functions & CROs can easily be demotivated (lose creativity) if they feel ‘left out’
- Project Planning & Support provides the data that link the Project with the Line
- PL can also be PM, or PM can also be PP, as long as roles are clear
- Beware Seniority issues (e.g. Team member senior to Project Manager)
- PL should keep Strategic team meetings to a small, relevant core membership
- PM should hold separate operational meetings for non-strategic issues
- Empower team members to represent their line function
- Teams can suffer from different seniority, experience, personality, time-zone, culture
- Proper team building should be an organisational Critical Success Factor

3. Is there a Project Plan and a Budget?

How are the strategic objectives laid out?

Do you know what the major milestones and decision points are? Who gets involved in managing the decisions?

How do you know what it's costing you to undertake the work and do the Project Leader and the expert functions agree?

- Strategic Objectives are often imposed by investors-> senior mgt.-> sponsor
- The TPP is a valuable focus
 - avoid ambiguity in decision-making by defining criteria up-front
- Frequent healthchecks – Is the strategic objective still relevant ? (Go / no-go)
- Maintain clarity about project-priority through portfolio review
- Milestones are now well established - almost an industry-standard
- Traditional Big Pharma has a lot to learn from CROs about resource planning
- Pharma is generally OK at forecasting & controlling external spend
- Stakeholders may have conflicts of interest
 - (e.g. Senior Line managers, Smallco founders)
- CROs need to reconcile their objectives with those of the sponsor

4. Does the Project want to Make or Buy?

Does your organisation have the capability to undertake everything the Project needs?

If not, how do you go about deciding what to do in-house, and what to buy in from outside?

- Reliance on inadequate in-house expertise leads to a failure to complete
- Judicious use of CROs allows Time-Cost & Risk-Cost trade-offs
- Capabilities vary from Virtual Smallcos to Fully-resourced Largecos
- Concern that sharing expertise with a CRO could compromise competitive edge
- In Largecos - using Local Operating Cos can generate Marketing leverage
- This is an area in which Project Teams & Line-functions may disagree

5. What are the Project Metrics?

What do you find most useful to track the progress of the Project?

Is there consistency in the organisation, or do you find different managers want different information? Why should this be?

- The Project must continue to deliver even in a changing environment
- Transparency maintains trust & confidence
- Here, the term includes Project-tracking (TCQ), not just performance metrics
- Monitor deviations from the TPP (scope creep)
- Ideally, Tools for Time, Cost & Quality should be linked or integrated
- Typically, MSProject is used for scheduling & Excel for budgets
- TPP, Risks & Issues often appear as Text, Tables & Traffic Lights
 - .. but spreadsheets help to introduce some quantification
- Provide good quality reports, tailored to the audience
- Senior mgt. need to see milestones, major risks & deviations from TPP & Budget
- Project Team needs Timelines (Gantt-chart), Risks & budget (committed & invoiced)
- Line management need to see (filtered) tasks over short forward timescale

- Access to good quality :
 Market research, Commercial analysis, Competitive intelligence
- Communicate to Project Team – talking
- Optimise development plan

6. Have contingency plans been drawn up to aid risk and issue management?

<i>Projects never run smoothly! So how do you cope with the unexpected?</i>

<i>Do you have an idea where things might go wrong in the future and do you have an idea what you might have to do if they do go wrong?</i>

<i>What preventative measures might you want to take?</i>

- Failure to respond correctly to simple situations results in escalation into issues
- Unprepared reaction to emergent data takes the plan outside its agreed scope
- Hold a Risk Workshop – it can help with team-building
- Identify the Top 5 Risks (at least) and maintain a Risk Register - Review every 3mo
- Quantify the risks according to Probability x Impact
- Risk is greater for a rapid High priority development
- Make risks & assumptions transparent upwards & downwards
- Invite peer review & involve sponsors (“friendly fire - but with blanks”)
- Consider holding a contingency budget
 (draw down if required & return when risk is released)
- Conduct Scenario Planning - have a Mitigation Plan & Contingency Plans
- Have a formal process for Change Control
- Express schedule in terms of base & stretch targets

7. Is there attentive Management Review?

<i>Who takes notice of the Project at a senior level, and how do they go about familiarising themselves with the Project's progress?</i>

- If this fails, the Project may lose sponsorship, resource & control over the scope
- Seek active management overview but not micro-management
 - which de-motivates the team
- Senior Management :
 - should provide Leadership, Championship, Sponsorship
 - are accountable for promises to Investors
 - are ultimate arbiters of high profile issues
- Only exceptions should be referred upwards formally
 - but keep senior managers well-briefed informally
- Invite a clear definition of the ground-rules - then seek forgiveness not permission
- Give them what they need - not necessarily what they want !

8 How do you manage interim review and closure?

Do you set about capturing key learnings from both successes and failures at the intermediate stages of a Project and especially at closeout?

How do you feed this back to the organisation?

- A “learning organisation” should capture Key Learnings from Line & Team
- Termination & orderly closure of projects tend to be under-rewarded
- Low priority is given to learning lessons from project-experience
- Encourage learning by estimating the cost of repetition & mistakes
- There should be open access to learnings (implies a no-blame culture)
- The opportunity to contribute to shared knowledge is motivating
- Invite teams from earlier related projects to your start-up, interim reviews & close-out
- Encourage similar technical review within line-functions
- If unplanned tasks emerge, add them to a library of planning templates