

My Manager Can and Will Serve as the Project Manager, But Should They?

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My people know exactly what needs to be done. They've already come up with a schedule that shows the project should be able to be completed within three months. It really is very straightforward so I should be able to manage it along with my current obligations without any trouble. I don't see why we need to designate someone full time as the project manager. And lastly, Frank would never allow us to manage his organization's activities.

That was my manager's response to my suggestion that we designate a dedicated project manager to oversee all project activities, his group's IT activities, other impacted functional areas and the vendors deliverables required to successfully complete this project. This particular project was initiated to upgrade the computers that ran an application which created, routed and tracked customer report outages or "tickets".

As a manager or department head you have probably heard these words. If you have great people working for you they typically view the appointment of a project manager as a negative reflection on their abilities. Your challenge is to ensure that you and your management team recognize the need for a dedicated project manager to oversee mission-critical, business transformational initiatives that warrant one. Otherwise, all of the internal and external activities and the cross-functional risks may not be identified. This can mean several things, including: the promised end dates will be overly optimistic and not met; the unidentified costs will surface and skew the business case; and the business objectives dependant upon a project being finished will constantly have to be reformulated as the project falters. And if it is primarily a technology focused project, the effect on the business user or customer can easily be glossed over.

Project management structure vs. good management oversight

If your manager has delivered a successful project of like magnitude and under similar circumstances in the past then ask yourself if that manager can manage a project as well as the normal day to day operations. You can also usually determine whether your project requires a dedicated project manager by answering the following questions:

- Is the project duration greater than two months?
- Are there multiple business functions impacted by project activities?
- Will the project result in a major process change in one or more areas of the business?
- Is a completion date absolutely critical (i.e. Year 2000)?
- Did the project originate outside of your organization/department?
- Is there more than one outside vendor involved in the project?
- Is the completion date critical to meet regulatory or compliance needs?

If you answered "yes" to more than one of the questions above, you should consider appointing a dedicated project manager that can provide structure and expertise using proven project management practices and techniques. In some instances, the decision may not be as clear and will require a more in-depth analysis, in which case you should consider the following factors:

- What is the bottom line for all stakeholder expectations?
- What are the cross-functional impacts of the initiative?
- Will the project's success (or failure) significantly affect your career?

What is the bottom line for all stakeholder expectations?

It is critical to learn why the business wants the project completed, especially if you were not directly involved when the project was formulated and approved, as was my experience with the particular project that I will use as an example. I recommend speaking directly with all of the stakeholders, specifically the business sponsors, before deciding whether or not to bring on a project manager because your own team will have their perspective, but it may not include the key reasons.

In my case, meeting with the other stakeholders was invaluable. They were able to clearly explain to me that the current situation was contributing to negative customer service that would continue daily until the completion of the project. They were also clear about what they needed, expected and believed IT (and my manager) had already committed to deliver. The stakeholders wanted the application fixed – before the start of winter because bad weather meant an increase in the number of customer trouble complaints or tickets. With high numbers of tickets, the computers (i.e. application) came to a virtual standstill. The business would then have to move to “manual” operation. Consequently, by meeting with the stakeholders I was able to see a more complete picture, not just my manager’s perspective on the project.

Has your manager identified and assessed all major milestones, cross-functional impacts and risks?

After identifying the stakeholder expectations, I immediately set out to determine how the manager arrived at the proposed three-month completion date. Did his project plan address the cross-functional risks? Was it real and well thought out?

Your challenge is to quickly ascertain whether the manager has identified *all* tasks, impacts and risks across multiple departments and outside vendors. To do this, I typically use a casual white board technique where the manager can demonstrate the project approach face to face. I suggest that you do not assume that the existence of a Microsoft Office Project Schedule satisfies these requirements. By using the white board, it enables you to listen to the facts while also observing the manager’s confidence in the project plan. By using the white board technique in a meeting with the manager I was able to recognize that he had not verified outside vendor obligations, deliverables and activities.

Having my manager demonstrate to me how he came up with the three-month time frame for completion was the quickest, most tangible way to assess whether his project plan was attainable. Twenty minutes into our meeting I discovered that key drivers which would influence time frames had not been verified. Certainly as a good manager he knew what they were, but he and his team had guessed on many timeframes. This meant that the team actually had no idea how long this project would take to complete and we all know that substantially missing the expected completion date on a project hurts professional credibility – both the project sponsors as well as the responsible manager. It became clear to both the manager and me that a dedicated project manager was needed.

How did I and how can you introduce a dedicated project manager?

After you have identified the need for a seasoned project manager, you should first be aware that the project manager you choose should have the ability to become an influential member of the project team. They must have the skills to manage the sensitive agendas across functional areas that are critical to achieving success. Whether it is an outside consultant or someone from an internal project management group, the project manager must be able to act as a partner, freely share why various approaches will make the team more successful and ultimately make everyone’s roles easier, while managing to fit into the current team.

I won skeptical support from my manager by stating that I would bring in a consultant that I had worked with before that was a true team player and that he could also interview him before engagement. We would position the consultant to help get things launched while partnering him with one of the managers own staff to carry on the project management role when he rolled off.

Not to say that to convince one of your own direct reports is easy on this type of change, but the real hurdle is to gain the other departments support and buy in. For an interdepartmental project to run smoothly each area must truly respect the project manager role and approach.

My peer who had the other bulk of the work was extremely skeptical of using an outside consultant or even establishing a single person as the overall project manager. After some frank discussion centered on the stakeholders desired date and fact that the current project completion date had not been well verified, he said he would give it a try for a full 30 days, then would make his final decision.

Most people will readily agree to the “try it” approach and usually will resist a forced decision. Therefore, the person you bring into this type of situation can make or break the team’s support and you should always remember to have an agreed to time limit where the final decision must be made to minimize uncertainty. It is rare that a formal project management approach is removed to fall back to a more casual day to day approach on a project. Personally, both as a client and as a consultant I’ve never seen it.

Two weeks into the consultant’s engagement my manager and peer said that bringing in this project manager was the best thing that they had ever experienced. This particular consultant was non-threatening but very good at drawing out what actually needed to be accomplished for the project. Why did it take only two weeks? Because after five working days of joint brainstorming sessions every single individual that had a role understood how and what needed to be done both in their own area and in the other areas. Confidence was high that deliverables and supporting tasks had been identified, that every step had been documented, realistic timeframes assigned and risks had been thought through. The project manager had captured a written, detailed activity schedule, facilitated the definition of the working teams and leads, scheduled regular status calls, obtained agreement on the role of the project office, etc. In summary, this individual had helped them develop a plan for a new completion date so that the entire team understood what it would take to meet it and felt it could be done.

Typically the only business measure of a project’s success is whether it met the original stakeholders expectations within the constraints of the business case. In this instance, I am happy to say it did. Though by now you can guess that the business case did have to be adjusted due to the extended time frame, and the stakeholders had to be convinced that November was not humanly possible, but March was a firm commitment. But at least this was done before dollar one was spent.

Conclusion

In the example I have provided, it was very likely the project would have eventually been completed sometime in May, about seven months later then the manager had originally estimated. This would have resulted in well over \$1M of unneeded overtime expense and worse, continued customer dissatisfaction. From my perspective as the department head, I would have been on the phone and in numerous uncomfortable meetings having to explain why things were taking longer then we had originally thought. And, becoming more involved in the detail then any manager wants their boss to be. But since the project was successful, other than one small bump that made it a week late, I want to leave you with the other less measurable project successes that will benefit a company for a long time.

Of approximately the 30 technicians, managers, directors and executives that had a part in this project not a single one will ever again allow a project to start without first naming a dedicated skilled project manager. They will also more readily seek the help of consultants if internal help is not available when required. Each one of them will review the business case to make sure that someone included money for project management and a project office. They all learned firsthand that it was more important to have a project manager and methodology in place than whose department or budget it came from. The chart below demonstrates the key differences between my line manager's project plan, the plan facilitated by the project manager and the actual results.

	Line Manager	Project Manager	Actual
Completion Date	Proposed November 30 (would likely have been sometime in May)	March 3 (following year)	March 10
Documentation of Key Activities	Partial – all verbal	90% - captured in MS Project	Training underestimated
Verification of Activity Time Durations	No	Yes - Verified with hardware vendor, application vendor, & other internal groups which had performed similar projects	Only the first hardware port took longer than the estimate
Cross-functional Activities and Risks Identified and Assessed	No	Yes - Scheduled sessions with all of the Planning Groups - Two other major initiatives caused major time line changes	No unforeseen adjustments in approach were encountered
Commitment By All Organizations to Planned Approach	No	Yes - Joint sessions were held to create the schedule and general approach. Presentations to each affected department head were made to gain commitment for resources	No missed tasks or milestones due to unavailable staff
Business Case Financials	Benefits – IT only, none included from the business users. Costs – Capital identified, but understated expense	Benefits – additional \$1M from business users, customer dissatisfaction never quantified. Costs – Additional \$2M identified	Final budget was under run by \$500K
Communications Plan	Assumed each line of business would be kept informed by their own team member	Regularly scheduled status meetings, weekly and monthly status report updates	Stakeholder meetings 1/Q – Cross-functional executive agendas identified and mitigated Weekly reports – Managers of work teams Executive update summary – Sent to all executives, vendors

I save all projects “Lesson Learned” notes, which I recommend using as checklists for new projects. Below are some of the direct quotes from this project’s debriefing session – from individuals that rarely used project management methodology. For the project management section, the team was asked, “What worked well and what could have been done better?”

Pros	Cons
<ul style="list-style-type: none"> - Dedicated project office - Dedicated team leaders - Bi-weekly calls supported opportunity for scheduled communications - Executive communications excellent - Kept questions away from working team - Risk mgmt. at manager level consistent with Project Manager - Everybody understands communication is the key - Having a project office in place to follow up on issues was great. - Documentation & communication of escalations by the project manager 	<ul style="list-style-type: none"> - Put project office in place sooner - Identify reporting at the start - Escalation detail should have been created prior to start of the project

As was the tradition in this department, they felt they knew what had to be done, knew when it was wanted, promised it would happen, would do their very best to make it happen and get it done eventually just not when they had promised. I don’t think this approach is too uncommon in corporate America when something is just a good revenue opportunity or a process improvement. Expert project management techniques are usually the norm when a government regulation or a major merger drives the changes required.

Why is this the case? Typically everyone in charge wants to stack the deck to make sure that the change is accomplished by a certain date! And a side benefit – the status comes from a common single source. In day to day business type projects – the project example I have discussed would be considered day to day even though it had a price tag of well over \$10M. All of us in business too often expect our operational managers to continue performing their regular duties and absorb the work associated with managing and controlling projects. This scenario is commonly termed “accidental” project manager. When we place “accidental” project managers in these situations, we all wonder why the projects take so long, cost more than projected and are evident of so many unforeseen problems.

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Founded in 1998, Project Managers, Inc. is a niche consulting firm that helps manage strategic business change for companies in the Fortune 1000, not-for-profits and government agencies. For more information, please call 704.332.6611 or visit us online at www.projectmgrs.com.