

**PROJECT
SOCIALIZATION:
BEYOND EXECUTING THE PLAN**

April 7, 2014

Socializing the project expectations and gaining support from senior leadership is a key component that is sometime overlooked. Tonight, we gain a perspective of what project socialization means, the importance of incorporating this concept into the management of a project, and sharing personal experiences.

AGENDA

- ❖ Speaker Background
- ❖ State of the Profession
- ❖ What is Project Socialization?
- ❖ Why is Project Socialization Important?
- ❖ Who Participates in the Socialization Process?
- ❖ When is the Right Time to Socialize a Project?
- ❖ How Should One Socialize a Project?
- ❖ Measuring the Success of Socialization
- ❖ In Closing

SPEAKER BACKGROUND

With over 14 years' experience in management consulting, Mr. Aldrich has worked with Florida government agencies, private companies, and non-profit organizations to assess and implement improvements in their business processes, organization, and technology. Mr. Aldrich is also an adjunct professor at Florida State University introducing graduate students to project management.

Clients Served:

Department of Revenue, Department of Environmental Protection, Department of Economic Opportunity, Department of Children and Families, Department of Financial Services, Department of Health, and Workforce Florida, Inc. He has also worked with the Wounded Warrior Project organization and St. Marks Powder (General Dynamics) to provide project management support and oversight.



STATE OF THE PROFESSION

- ❖ The Standish Group's research results show another increase in project success rates, with 39% of all projects succeeding (delivered on time, on budget, with required features and functions); 43% were challenged (late, over budget, and/or with less than the required features and functions); and 18% failed (cancelled prior to completion or delivered and never used)
- ❖ The increase in success is a result of several factors, including looking at the entire project environment of processes, methods, skills, costs, tools, decisions, optimization, internal and external influences, and team chemistry.



STATE OF THE PROFESSION (CONT.)

- ❖ More Focus on “User Involvement” – a project team that is tuned into the users’ needs and can understand their real problems has a major positive effect on a successful outcome. However, research indicates that as a group, project managers have only moderate skills to manage users and their expectations.

Factors of Success	Pts.
Executive Management Support	20
User Involvement	15
Skilled Resources	15
Project Management Expertise	12
Agile Process	10
Clear Business Objectives	6
Emotional Maturity (Culture)	5
Execution	3
Tools and Infrastructure	1

- How do we, as project managers, get more connected to our users, project team, and management?
- What tools and skills are necessary?
- When is the appropriate time?

WHAT IS PROJECT SOCIALIZATION?

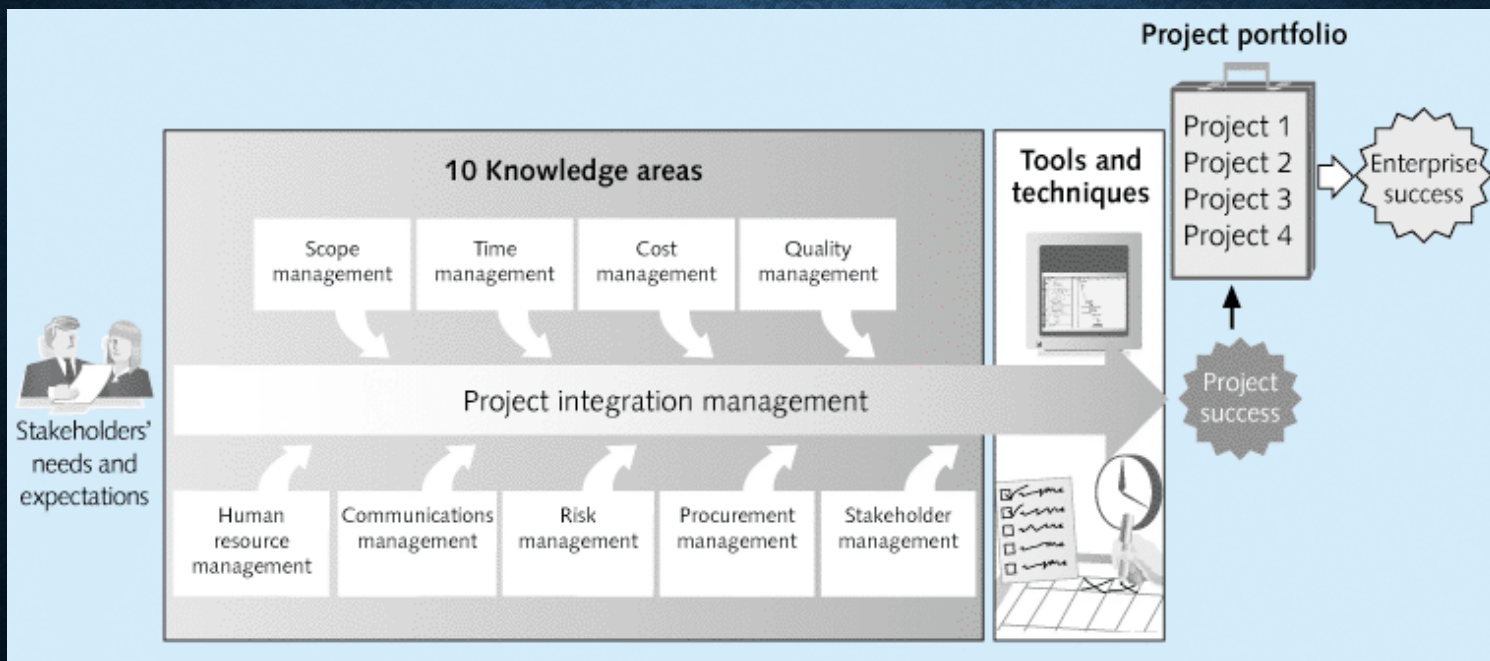
❖ Key terms and concepts:

- “Socialization” refers to the lifelong process of inheriting and disseminating norms, customs, and ideologies, providing an individual with the skills and habits necessary for participating within his or her own society. (Wikipedia)
- A “project” is a temporary endeavor undertaken to create a unique product, service, or result (PMBOK® Guide, Fifth Edition, 2012)
- “Project management” is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements (PMBOK® Guide, Fifth Edition, 2012)
- “Project managers” work with project sponsors, project team, and other people involved in a project to meet project goals. The ability to adapt to the various internal procedures of the contracting party, and to form close links with the nominated representatives, is essential in ensuring that the key issues of cost, time, quality and above all, client satisfaction, can be realized. (Wikipedia)

WHAT IS PROJECT SOCIALIZATION? (CONT.)

❖ Executing the Plan

- Initiate, Plan, Execute, Monitor/Control, Close
- Knowledge areas describe the key competencies that project managers must develop
- Project managers must have knowledge and skills in all 10 knowledge areas



WHAT IS PROJECT SOCIALIZATION? (CONT.)

❖ Beyond Executing the Plan

- Get Your Stakeholders Involved (internal/external)
- Build Relationships (breakdown barriers)
- Educate Stakeholders
- Advise and Support Executive Management
- Communicate Frequently, Accurately and to Your Audience
- Support your Team (Servant Leadership)
- Collaborate and Facilitate Discussion

Benefits Include:

- Planned and managed expectations throughout the project
- Secured buy-in and commitment earlier on in the project
- Identified risks that could cause significant rework or even project failure
- Conveyed message to individuals that we are interested in their ideas, suggestions, thoughts, and comments about the project
- Improved efficiencies and effectiveness in managing the project
- Increased acceptance of the project upon implementation

WHY IS PROJECT SOCIALIZATION IMPORTANT?

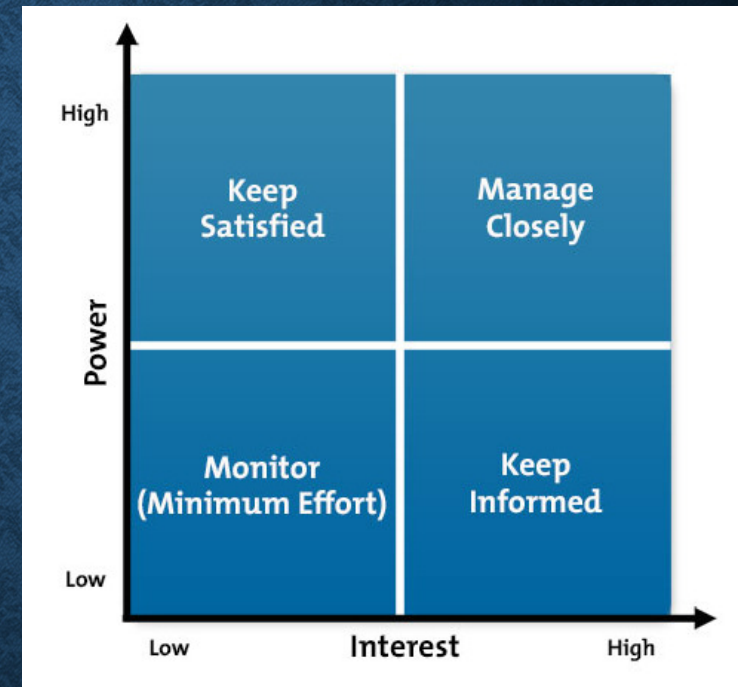
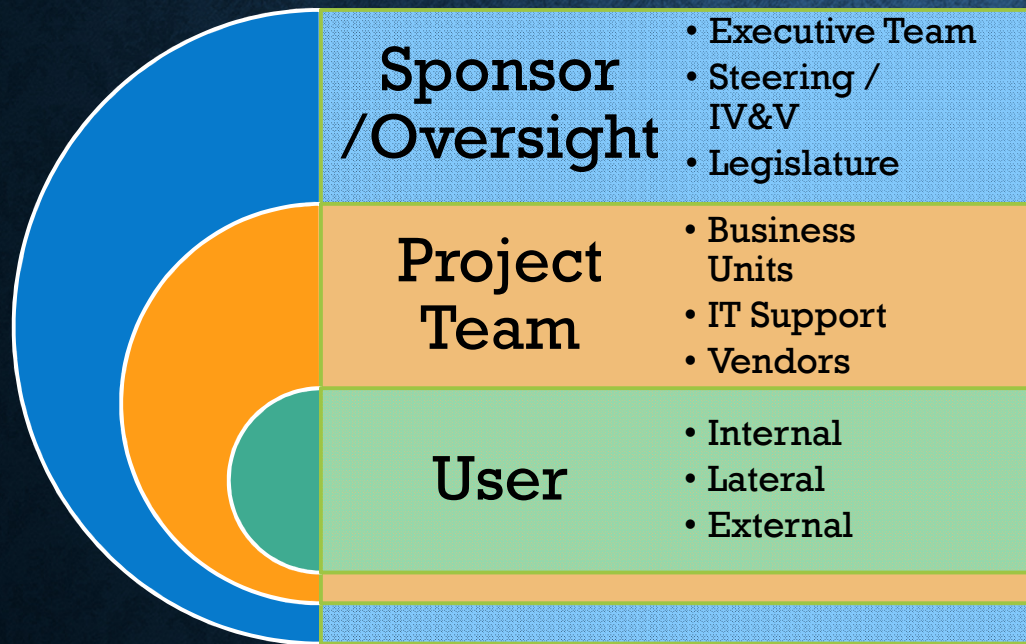
- ❖ Facilitates the sharing of information
- ❖ Manages the perception of the project
- ❖ Supports “executing the plan”
- ❖ Validates stakeholder expectations throughout the project
- ❖ Actively involves stakeholders and addresses their interests
- ❖ Contributes to Overall Project Success



WHO PARTICIPATES IN THE SOCIALIZATION PROCESS?

- ❖ Stakeholders are the people involved in or affected by project activities and include; the project sponsor, the project manager, the project team, support staff, customers, users, suppliers, opponents to the project
- ❖ Stakeholder analysis is a technique that can be utilized to identify the key people who have to be won over or who you would like to have their support. Once you understand who your stakeholders are you can then establish how you will gain the support that helps you succeed.
- ❖ The benefits of using a stakeholder-based approach are that:
 - Gaining support from key stakeholders to shape your projects at an early stage to make it more likely that they will support you and increase the success of the project
 - Communicating with stakeholders early and frequently can ensure that they fully understand what you are doing and understand the benefits of your project
 - You can anticipate what people's reaction to your project may be, and build into your plan the actions that will win people's support.

WHO PARTICIPATES IN THE SOCIALIZATION PROCESS? (CONT.)

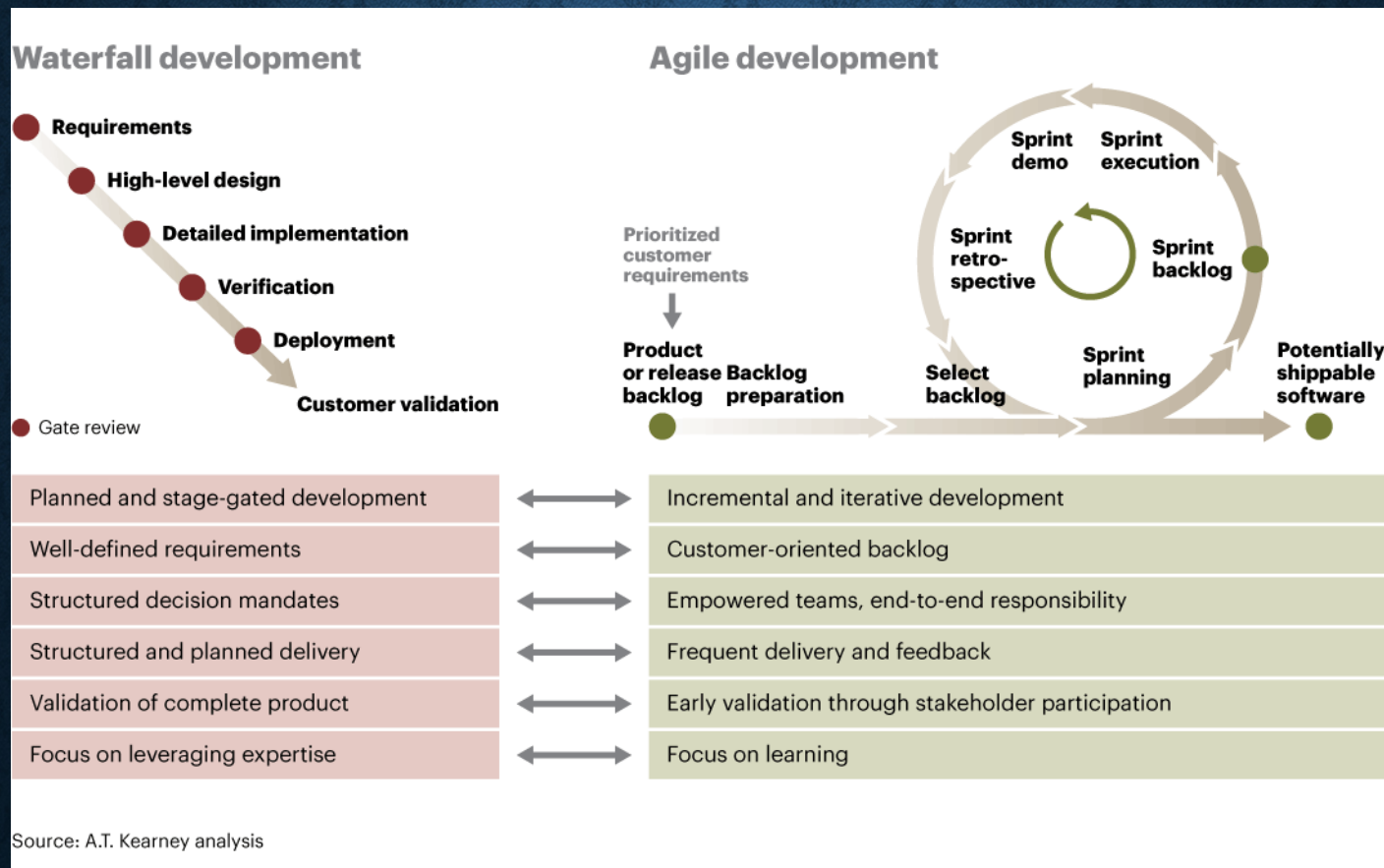


Stakeholder management is critical to the success of every project in every organization I have ever worked with. By engaging the right people in the right way in your project, you can make a big difference to its success

WHEN IS THE RIGHT TIME TO SOCIALIZE A PROJECT?

- ❖ Business Case, Feasibility Study, Market Analysis
- ❖ Procurement Process (RFI, RFP, ITN, etc.)
- ❖ Vendor Selection
- ❖ Kickoff, Status Meetings, Phase Gates, Steering Committee Meetings, Legislative Requests
- ❖ All Stages of SDLC (Define, Design, Develop, Test, Deploy, Support)
- ❖ Project Closeout / Lessons Learned

WHEN IS THE RIGHT TIME TO SOCIALIZE A PROJECT? (CONT.)



Even though Waterfall and Agile management methodologies are different in their principles and the approach to managing projects, each offer opportunities to socialize the project. 14

HOW SHOULD ONE SOCIALIZE A PROJECT?

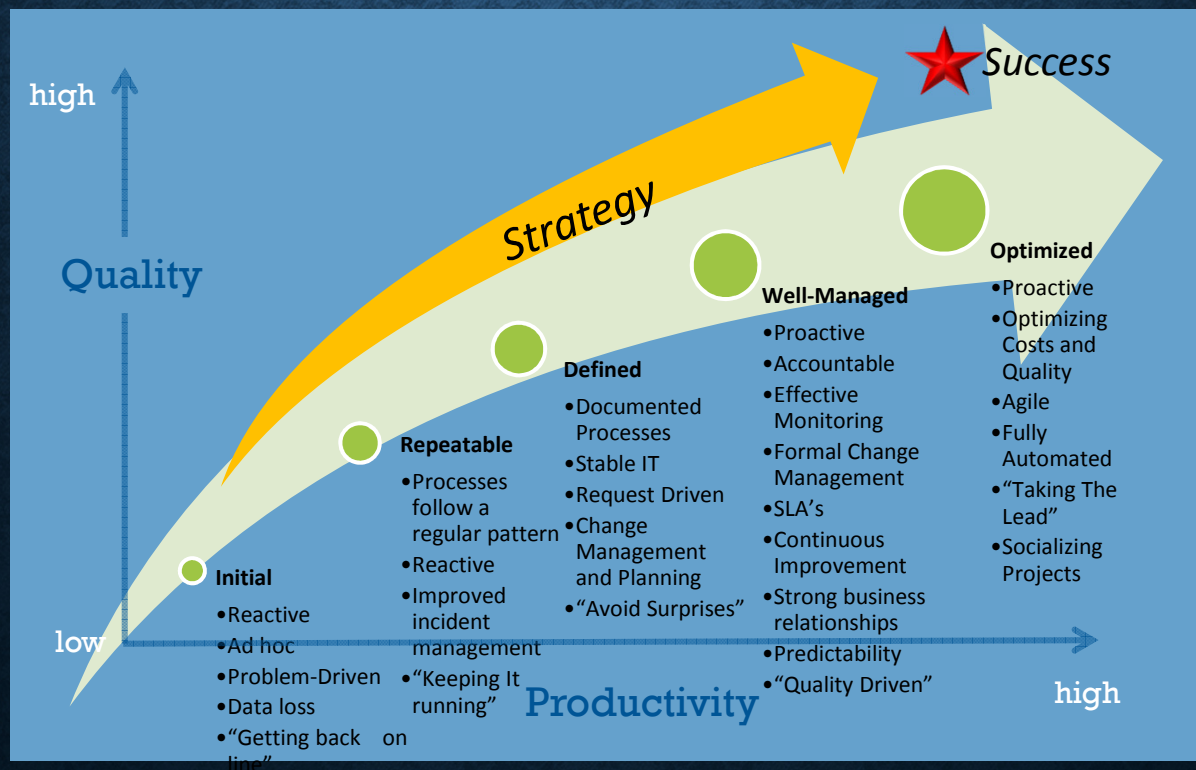
- ❖ Utilize project management tools, techniques, and technology
 - Project charter, scope statement, and WBS (scope)
 - Gantt charts, network diagrams, critical path analysis, critical chain scheduling (time)
 - Cost estimates and earned value management (cost)
- ❖ Communicate Often and Facilitate Open Discussion (email, meetings, lunch and learns)
 - Stay Up to Date on the Industry and Your Environment
 - Be Knowledgeable and Aware of the Your Environment
 - Bring stakeholders together
- ❖ Build Relationships and Be a Leader
 - Empower Your Team to Get Actively Involved
 - All Hands Meetings / Intranet / Internet site
 - Social Media (LinkedIn, Blogs)
 - Professional organizations and community events

MEASURING THE SUCCESS OF SOCIALIZATION

- ❖ Recent research findings show that companies that excel in project delivery capability:
 - Use an integrated project management toolbox (standard/advanced PM tools, templates, and processes)
 - Grow project leaders, emphasizing business and soft skills
 - Develop a streamlined project delivery process *Success*
- ❖ Measure project health using metrics, like customer satisfaction or return on investment, retrospectives, dashboards, and tracking systems provide early warning system so corrective actions can be taken.
- ❖ The Organizational Project Management Maturity Model (*OPM3*®) is one of the foundational standards of the Project Management Institute that provides a framework to deliver strategy through clearly linked portfolios, programs, and projects. This framework becomes the baseline from which you are able to compare outcomes and measure performance.

MEASURING THE SUCCESS OF SOCIALIZATION (CONT.)

- ❖ *OPM3* enhances an organization by developing and maturing project, program and portfolio competencies (stakeholder engagement, estimating, scheduling, management, etc.). *OPM3* matures the project, program, and portfolio management processes into high-quality delivery processes that are well understood, stable, repeatable, and predictable.



IN CLOSING

- ❖ Try Out “Socialization” & Share Your Experiences
- ❖ Get “Actively” Involved with the PMI Tallahassee Chapter
- ❖ Let’s Connect! Visit my LinkedIn page at:
<http://www.linkedin.com/in/matthewtaldrich>

Thank you

RESOURCES

- **The CHAOS Manifesto, 2013, The Standish Group International**
<http://versionone.com/assets/img/files/CHAOSManifesto2013.pdf>
- **Information Technology Project Management, 7th Edition , Kathy Schwalbe**
http://www.cengage.com/search/productOverview.do?Ntt=6213830092377987371803382500433559801&N=16+4294922239+4294966473&Ntk=P_EPI
- **The Value of Project Management, Project Management Institute**
- http://www.pmi.org/business-solutions/~media/PDF/Business-Solutions/Value%20of%20Project%20Management_FINAL.ashx
- http://www.mindtools.com/pages/article/newPPM_07.htm#Interactive
- <http://alex.struminger.com/socializing-technology-platforms/>