Tough Love – How to Ensure Your Project Team Delivers

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Is This Achievable?

My responsibility is to get my 25 guys playing for the name on the front of their shirt and not the one on the back.

Tommy Lasorda
Former Manager, Los Angeles Dodgers
A Methodology that Addresses How to Ensure Your Contractor – Owner Project Team Delivers Results

- Provide the environment teams need to succeed
- Structure the team to work effectively
- Adopt internal team processes necessary for success
- Measure team effectiveness and hold individuals and the team accountable

**Context**
- • Initiation Document
- • Business Objectives
- • Executive Sponsor

**Structure**
- • Team Selection
- • Operating Principles
- • Decision Making

**Internals**
- • Rules of Conduct
- • Conflict Management
- • Team Trust

- Balanced Scorecard

EPT Plan ➔ Team War Room ➔ Team Engagement
Business Problem

• Organizations live and die by the effectiveness of their project teams.

• Management focuses on hard skills and competencies such as engineering, quality, work processes, training, etc.

• Management spends almost no time ensuring that the Contractor – Owner project team works effectively to deliver business results by utilizing *internal* project team processes and planning.
Project success is tied to team effectiveness? (Multiple Choice)
A. Minimally dependent
B. Somewhat
C. A lot
D. Totally dependent

Why do we spend so little energy and resources ensuring our Contractor – Owner project teams are effective? (Multiple Choice)
A. We don’t think it is important
B. We don’t know how to address the problem
C. This is a “fuzzy,” unfixable issue
D. People are people
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• How to Implement EPT
The Business Problem and Why This Approach Works

- We focus on everything else other than care and feeding of the Contractor – Owner project team
- There is no one thing that we can we do to “fix” this

Solution
- Develop an Effective Project Team (EPT) plan
- This is similar to a Project Execution Plan, a Construction Plan, a Start up Plan, etc.
All projects with associated team members are Serial #001

- Unique point in time, economic environment, and work scope
- Unique team members

Break up project teams into sub teams with “single digit” team members

Develop well defined team processes

- Ad hoc approaches lead to confusion, frustration, and conflict

Well defined processes are the key to Effective Project Teams (EPT)

Develop and Implement an “Effective Project Team” Plan
What Do Individuals Want? – Effective Project Team Approach Addresses These Basic Needs

What’s my job?

Challenging environment

Team contributor

How do we work together?

How do we manage conflict?

How do we make decisions?

Personal and career growth

Effective Team Member

What is in it for me?
Use Single Digit Group Sizes to Drive ~100% Individual Engagement

Distribution of Participation as a Function of Group Size

*The Larger the Group the More “We Leave Behind”*

- In a 4 person group, all contribute “about equally”
- In a 7 person group, 4 people minimally contribute

Group Size: 3, 4, 5, or 7 persons

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Integrated Model for Effective Project Teams (EPT)

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EPT Plan → Team War Room → Team Engagement
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One Page High Level Initiation Document – Keeps Everyone Focused on the Right Thing

Ensures project team works on the right things

Initiation Document

- Business Opportunity & Objectives
- Project Objectives
- Executive Sponsor
- Team Members
- Work Scope
- Key Challenges and Risks
- Key Milestones
Business Objectives are the Guiding Light for Team Performance, They are Why Teams Exist

Teams need to clearly understand their goal, otherwise how can they map a path to it?

IPMA World Congress 2011, Independent Project Analysis
Executive Sponsor – the Foundation for Effective Teams

• Executive Sponsor clears the barriers so that the project team can execute.
  • Resources
  • Senior management misalignment
  • Timing
• This is the *foundation* for effective teams....it is a requirement
• Think of a runner that is going through a field with lots of obstacles, the role of the Executive Sponsor is to clear those barriers.
The role of the Executive Sponsor has grown in importance in the last 5 years

Executive Sponsors are in short supply and overextended over many projects

Response to “Are Executive Sponsors Overextended”
Executive Sponsor Challenges

When Executive Sponsors are overextended.....

- Greatest negative impact is on their ability to remove roadblocks. 33%
- Project outcomes are impacted by schedule delays. 45%
- Project teams are affected by delays in decision-making. 28%

Executive Sponsor selection is just as important as Project Manager selection.

Boston Consulting Group/PMI, Keenan & Tankersley, Oct 2014
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Team Selection – Team Member Skills Required for an Effective Team

- Select team members based on a multiplicity of skills that drive team effectiveness
- Why do we tend to focus on technical skills for team selection?

- Interpersonal
- Technical
- Task Management

Is the engineering culture driving this?
Team Selection – Skills Sets that Drive Team Effectiveness and Ensure that Everyone Works Together

Task Management
- Initiating ideas
- Clarifying issues
- Opinion Seeking
- Energizing the team
- Coordinating
- Detailing
- Challenging the team

Interpersonal Skills
- Mediating conflicts
- Supporting others
- Compromising
- Reflecting on positive & negative
- Accepting other’s ideas
- Encouraging others to participate

This is the glue that keeps the team “functional”

This ensures members’ emotional needs are met and keeps them engaged

Adapted Leigh Thompson, Making the Team, 4th edition, 2011
Operating Principle Components – Teams Require an Operational Rhythm

- **Roles and Responsibilities** –
  - Go through the process and document in RACI or LACTI
  - Lots of work!
- **Processes for deliverable development**
- **How will the team operate**
  - Daily
  - Weekly
  - Monthly
- **Key reports**
- **Key meetings**
- **All administrative support**
Simple Decision Making Approach

• Teams make 1000’s of decisions during project life cycle
• Decisions can drive conflict
• Team needs a transparent and well understood process

Rules of Conduct: Respectful, Listen, Fact Based
1. Identify the problem
   - What is the single question that the group needs answered to accomplish the purpose of the meeting?

2. Surface assumptions and biases
   - What assumptions are associated with the single question?
     - We think we know that management wants

Use Rules of Conduct & Behavior
- Listen to others for understanding
- Remain fact based
- Tough on issues not on each other
3. **Identify and analyze issues**
   - Before answering the question, what are the issues that must be answered to fully understand the problem?

<table>
<thead>
<tr>
<th>Issues</th>
<th>Relevant Facts</th>
<th>Best Response</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. **Develop alternative solutions**

<table>
<thead>
<tr>
<th>Alternative Solutions</th>
<th>Pro’s</th>
<th>Con’s</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</table>

5. **Decide on a solution**
   - Which is the one best solution?
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Team Structure vs. Team Internals – It Takes Both

**Hard Processes**
- Structure:
  - Team Selection
  - Operating Principles
  - Decision Making

**Soft Processes**
- Internals:
  - Rules of Conduct
  - Conflict Management
  - Team Trust
Common Approach – Typical Rules of Conduct – Project Team to Develop and Own!

Rules of Conduct & Behavior

- Respectful of others
- Analytical approach or facts are friendly
- Hard on facts - easy on each other
- We will listen to each other
- Attend meetings and be prompt
- Focus on end product - everyone does work

As the team works together to develop these Rules of Conduct & Behavior they will:

- Embrace and own them
- Hold each other accountable
Typical Conflict Areas

- Emotional Conflict
- Personalities & Emotional
- Roles & Responsibilities
- Resources
- Administrative Procedures
- Work Scope
- Schedule

• Conflict is unavoidable
• Well defined team processes address root causes of conflict
• Conflict should be the exception

- Task driven and process conflict
- Address with process and structure
Proper Planning Minimizes “Bad” Team Conflict and Supports “Good” Conflict

Emotional Conflict
Address based on trust

Task Driven Conflict
Encourage and use Rules of Conduct

Process Conflict
Operating Principles, Decision Making, Roles/Responsibilities and other processes minimizes this
Conflict is Part of the Team Process – This is the Hard Part

<table>
<thead>
<tr>
<th>Conflict Type</th>
<th>Define</th>
<th>Example</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Conflict</td>
<td>Focus on processes and roles &amp; responsibilities</td>
<td>Who will do what. How will it be done</td>
<td>Develop team processes and roles &amp; responsibilities</td>
</tr>
<tr>
<td>Task Conflict</td>
<td>Disagreement on how to do work at hand</td>
<td>Based on differences of opinion and background</td>
<td>Encourage to get to the best solution, healthy discussion, etc.</td>
</tr>
<tr>
<td>Emotional Conflict</td>
<td>Disagreements based on personal and social issues unrelated to work</td>
<td>Relationship tension, anger, “lack of respect,” etc.</td>
<td>Interrelationship trust</td>
</tr>
</tbody>
</table>

Can wreck a team if not managed

This is really hard to do
It Starts with Trust – Activities and Behaviors that Support Effective Teams

1. Individuals Open Up and Trust Each Other
2. Members Not Afraid to Candidly Discuss Key Issues – due to mutual trust
3. Individuals Make Commitments and Stick to Them – because of candid and open discussions
4. Individuals Hold Each Other Accountable for Performance – due to individual commitments
5. Team focus on Collective Success Over Personal Goals – because of individual accountability for performance

The focus on Collective Success or Team Results starts with Trust

Adapted from Patrick Lencioni, The Five Dysfunctions of a Team
This is Why Trust is so Important Among Team Members

High Trust Dampens Team Conflict

Peterson & Behfar, 2003, The dynamic relationship between performance feedback, trust and conflict in groups
Team Trust – Use Proven Processes to Ensure One-to-One Relationships – part of Team OPERATING PRINCIPLES

- Commit to the relationship
- Optimize safety
- Narrow to one issue
- Neutralize defensiveness
- Explain and echo
- Change one behavior only
- Track it

Trust

CONNECT Model, 1993 LaFasto and Larson
How to Build Trust and Offsite Sessions

• Use a “War Room”
  • Show metrics
  • Show principles
  • Show processes

• Off site workshops are good at building trust, if all the other processes are in place

• Otherwise, results are short lived, and should not be done
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Why Measure?

• Measurement is one of the most leveraged activities that we can perform

• Measurement is the single most motivational part of sports
  • Alabama vs. Auburn

• Man is a measurer of things
  • Time: hours, calendar, agenda…..
  • Investments, retirement plans…
  • Temperature, rainfall, etc.
  • Blood pressure, cholesterol, weight..
  • Cost, schedule, quality….

• Measurement facilitates socialization
Why Measurement is Critical to Team Success

• Focuses attention on what is important
• Clarifies team expectations
• Aligns the organization
• Makes individuals and groups accountable
• Provides the basis for goal setting
• Improves decision making

WHAT GETS MEASURED GETS DONE
Typical Project Balanced Scorecard – Cascade Goals to Sub Teams – Align with Incentive Compensation

- Safety
- Operability
- Cost
- Schedule
- Economic Metrics

- Project Objectives
  - Customer Satisfaction
  - Commercial Goals
  - Opns Surveys

- Customer Perspective
  - Team Survey Metrics
  - Member Engagement
  - Team Trust

- Processes
  - Project Quality
  - Change Orders
  - Field Productivity
  - Project Staffing

- Learning & Growth
  - Team Survey Metrics
  - Member Engagement
  - Team Trust

- It’s more than just cost, schedule, and safety
- Use a balanced scorecard to ensure team member needs are measured and met
- Measure project team internals
- What do internal customers think?
- May be managed by Project Controls or Team Performance Coordination
Typical Engagement Survey

• How happy are you with your job?
• My work directly impacts project success
• How would you rate your colleagues and team members
• I see professional growth and career development opportunities for myself in this organization
• There is open and honest communication between managers and employees
• Managers provide a proper work – life balance

Multiple choice questions – scale 1 – 5.
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• Balanced Scorecard
How to Implement an Effective Project Team (EPT) Approach for your Project – *You Need a Plan*

- The key to success is to develop an Effective Project Team Plan
- This is similar to a PEP, a Construction Plan, Start Up Plan, etc.
- Assign a Team Performance Coordinator
  - Business Analyst
  - Project Engineer
  - Consultant
- Develop a schedule
- Provide resources

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Assign Team Perform. Coordinator

Develop a Contractor - Owner EPT Plan

Implement

Assess Scorecard & Adjust

Periodic Offsite Engagement

Develop a Schedule w/ Resources

Effective Project Team (EPT)
Typical Effective Project Team Schedule

- Initiation Document
- Executive Sponsor
- EPT Plan
- Team Selection
- War Room

Team Members Develop:
- Operating Principles
- Decision Making
- Rules of Conduct
- Conflict Management

Team Trust Workshops

Team Scorecard

Evaluate, Measure, & Team Engagement
Case Study #1

Situation

• Team experiencing a tremendous amount of conflict, team members not engaged, and team not working together. Project Manager requested assistance in addressing the problem.

Response

• A brief assessment found that internal conflict resulted in a dysfunctional team. Much of the conflict resulted from the communication and decision making approach as well as poor trust among team members. Through a series of workshops the team developed an approach to communication/decision making as well as “rules of engagement (conduct)” that everyone utilized.

Outcome

• Development of the rules of engagement and communication / decision making approach drove team alignment and raised the trust level within the team resulting in more effective team work.

• Above approach helped meet project objectives.
Case Study #2

Situation

• Large capital project team was in the process of being assembled with substantial conflict among team members. Many of the members were from disparate organizations outside the firm. An additional source of conflict was the role of stakeholders outside the project team.

Response

• A brief assessment indicated that the root cause of the conflict was unclear roles and responsibilities and “position” within the organizational chart. A series of interviews was conducted to realize a first pass on a LACTI or RACI chart. A series of spirited workshops was conducted to determine roles and responsibilities among team members as well as their relationship with stakeholders outside the project team.

Outcome

• Stakeholders felt they had been heard, understood their role, and proceeded to initiate the project with much less conflict and stress.

• Supported meeting business and project objectives.
Case Study #3

Situation

• Project organization was experiencing high turnover and team members dissatisfied with how the project was being managed.

Response

• Several of the team members felt that their assignment did not provide growth opportunities and that their career aspirations were not being addressed. While this is typically the responsibility of the functional manager, the project manager needed to get involved as his project was at risk.

• In addition to the typical project scorecard metrics a team member “Learning & Growth” component was added in recognition of the current staff market environment.

Outcome

• Team members were much more satisfied as they understood that their career goals were being addressed by the Project Manager as well as the Functional Manager.

• Much less conflict and team focused on meeting project objectives.
Summation: Integrated Model for Effective Project Teams (EPT)

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Questions?
With over 30 years of project management, organization transformation, and consulting experience, Pete Luan guides his worldwide clients into improving organization and project performance. Serving as a trusted advisor to top executives, he not only helps these companies improve their project predictability and performance, he also leads these changes to achieve those goals.

He is a project management instructor for a noted firm in the E&P space. He has authored numerous SPE articles and developed courses on project and risk management best practices.

Some of his clients include Plains All American, Chevron, BP, Conoco Phillips, Talisman-Repsol, Oceaneering, Maersk Oil, Marathon, Addax, Kosmos, Cairn Energy, and Noble Energy.

Prior to building his consulting business, Pete managed world leading major upstream and chemicals manufacturing projects across the globe for British Petroleum for 20 years. Before joining BP, he was a Captain in the US Army.

Pete holds Bachelor’s and Master’s degrees in Mechanical Engineering from Rice University and has completed the Executive Program at Harvard Business School. He is PMP certified and a previous member of the National Speakers Association.

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