



Project Management 2.0: “It’s all about the business man!”

According to a recent article in CIO magazine, “Today’s CIOs have to be a little clairvoyant, not only transforming their best and brightest managers into leaders, but also preparing them for challenges to come” (CIO, Forging Good Leaders in Bad Times).

I couldn’t agree more, especially considering the many challenges most IT organizations are facing: business intelligence, enterprise applications, servers and storage technologies, legacy application modernization, and collaboration technologies, just to name a few. For a guy like me, these priorities translate into skill set needs – but not only the skills of system architects, programmers, and network engineers. IT leaders are going to need great Project Managers (PMs) to work across these skill sets, driving change and carrying their organizations into a more competitive future.

And I mean “great” PMs, not just “good” ones. Good PMs are technically-savvy and know the methodologies required to manage project progress according to scope, cost, and schedule constraints. Historically, technical prowess and organization skills were enough to do a decent job managing IT projects. Going forward, however, as IT strives to become ever-more strategic and the business environment grows ever-more complex, these two attributes – alone – are not enough.

Based on the trends I’ve seen, there are three critical characteristics I believe will make or break project managers’ efforts into 2010 and beyond:

Three critical characteristics of a 2.0 PM:

1. They’re bilingual – i.e. they “operationalize” tech talk
2. They’re adept at playing “Columbo” to level-set expectations
3. They regularly establish and leverage links to daily business operations

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1. “Operationalizing” Tech Talk.

The large majority of PMs’ roots are in the IT organization. They grew up in IT and, in the course of their daily job duties, most spend the bulk of their time associating with other techies.

While it’s critical for PMs to speak “tech talk” to their technical colleagues, it is equally important that they speak the language of operations to their internal business customers. To the unfortunate surprise of many, great PMs don’t dazzle these customers with the leading-edge technologies and gadgets. They do so by understanding the business challenges they face and supporting their efforts to more strategically serve their customers’ needs.

Said another way: A PM must be a master diplomat and translator. Without understanding the business – the context it operates within, the goals it aims to achieve, the customers it serves, the language it speaks – a PM cannot successfully translate the business’ need into technical solutions.

Take the following (real-life) scenario for an example:

A company was transitioning from using a home-grown activity and contact management system to a customized Siebel CRM solution. During a scoping session, the PM asked leaders to describe the top three challenges the sales force faced. The VP of Sales responded citing quicker growth, customer acquisition, and cross-selling to

existing customers. The PM noted these challenges then took the discussion down another level of detail. He asked, "What prevents the sales force today from quick growth?... From customer acquisition?... From cross-selling?" After a solid 30 minutes of operational dialogue, the PM was in a position to ask "What information do you want your CRM to provide your sales force that will help them with the challenges we just discussed?" The insight gained through this discussion then allowed the PM to clarify subsequent technical requirements in terms of strategic and operational goals.

(Interestingly enough, the PM also helped the group discover that their main issues would not be solved by a Siebel CRM. Several other process and human capital projects would be necessary to accomplish the far-reaching changes leadership aimed to accomplish.)

2. Play "Columbo" to Level-Set Expectations

Remember the TV character Columbo? Columbo was a great detective because of his approach to solving mysteries. Every episode he identified the criminal through the same tactics:

1. Start by innocently asking the suspect a 30,000 foot question
2. Act as though you're really thinking about the suspect's answer
3. Confirm the answer in the suspect's own words
4. Continue to innocently question the suspect, drilling down with more questions – a 10,000 foot, a 1,000 foot, a 100 foot, a 5 foot – until the suspect him or herself reveals their own crime

Great PMs operate in much the same way. While they are not in the business of prosecuting criminals, they are trying to get to the truth about the issues the business is trying to solve. To do this, they need to uncover the root-cause behind why operations is seeking IT's support.

Digging for the root cause is so important simply because IT cannot offer its customers silver bullets. The solutions the business needs tend to require a multi-faceted approach to change: one that includes persistent and visionary executive leadership, consistent management, a culture of accountability, the right organizational structure, effective training, the right incentives, etc. Every great IT project manager is well aware of this fact. Thus, they know that when working with customers to capture project requirements, they must dig deep enough to clarify true needs and set realistic expectations.

Steps to Level-Set Customer Expectations:

1. Ask "Why?"
2. Ask "Why?" again
3. Repeat until root cause driving customer requirement is abundantly clear

Here is another example of how this digging to the root cause works:

During a business intelligence Joint Applications Design (JAD) session in which I participated, customers were requesting that IT build a single user interface that would allow them to gain visibility into a variety of data currently housed in disparate systems. To fully clarify the customers' needs, the project manager facilitating the session asked a series of "whys" – Why is the current approach broken? Why is that a problem? Why does management behave that way?... As a result, she not only qualified the customers' requirements for the interface, but also led the group down a path of new realizations. The customers were struggling to get good, clean data entered into their reporting systems. They also lacked a consistent management process to ensure leaders and managers were discussing the data and using it to drive business decisions. Should these issues persist, it really didn't matter if IT built the most amazing user interface the world's ever seen. That interface would need to be supported by a data governance team as well as an overall management operating rhythm to ensure the reports generated were used productively.

How bilingual are your PMs? Can they answer the following questions?

- Who is my customer's customer?
- What are the top three business challenges my customer's customer is seeking to overcome?
- What are the top three benefits my customer's customer is seeking from my customer?
- What is my customer's strategy to help its customer overcome those challenge and/or realize those benefits?
- How is my project supporting this strategy?
- What does project success will look like from the customer's perspective?
- What does it look like from the customer's customer's perspective?

Too often PMs fail to explore the bigger picture context surrounding their projects. They cater to functionality demands and unintentionally set IT up to fall short of expectations. Great PMs manage their project outcomes while also helping customers see what and where non-technical change must occur to realize true enterprise benefits.

3. Establish Links to Daily Business Operations

I've already discussed the value of a project manager who seeks to understand the customer's customer and the business' operational strategies. To actually enable your project managers to gain this level of insight requires some effort.

It never hurts to have monthly or quarterly discussions in which IT and other business leaders engage in a meeting of the minds. What are all the various groups doing to execute the strategy, what challenges are they encountering in the process, how are they managing through these challenges... But, when it comes to really identifying how the business operates and how the business could benefit from IT's innovations, rarely do such forums go deep enough.

To dig deep, I recommend "planting" business analysts into IT's customer's operations. IT should have a team of analysts in the business' daily environment, witnessing the business' daily routines, and uncovering areas of opportunity for IT to address its customer's needs. The business should view these analysts as go-tos for technical support as well as peers who help them do their jobs easier by building reports or mapping out process improvements. On a periodic basis, these analysts should convene with IT leadership to share their experiences and collaboratively identify high impact opportunities for IT to add enterprise-wide value. When new projects are chartered and sponsored, the analysts then play a lead role in capturing user requirements and supporting project objectives.

Another option I've seen work well is for the business to identify Business Process Owners (BPOs) who are "born and raised" in operations and have earned the respect of their peers, but are interested in transitioning to a more technical role. Since they possess the real-life perspective of an operations employee, a BPO can be tasked with helping multiple support departments – such as training, marketing, and IT – better support their customers. During IT projects specifically, the BPO representing IT's customer can play a critical role. He acts as a dedicated resource responsible for providing the necessary operational perspective and guidance.

This list of characteristics is by no means comprehensive. It is merely a good starting point that I believe will soon translate into the expected profile of the next generation IT project manager. By better understanding and engaging the business, IT project managers are better equipped to act as strategic partners to the business they ultimately support.



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