

Project Management

Project Consulting

Delta's project consulting approach is based on five principles:

1. The client is always capable of resolving their own difficulty, with a little help from someone as experienced as they are at being stuck with the impossible.
2. Confirm what they already know.
3. Stuck-ness is usually the problem.
4. Consider preference to proliferate choice.
5. Consider anything but that!

Project meeting protocol

We have a process for making ready the requested work so it can be promised. We have a process for making promises day-by-day for performing the work. Now we need a process for finding out what work is in process and what is being completed. We can't wait 'til a weekly meeting. Why? Because your work tomorrow depends on my completion today. Coming into work tomorrow only to find out that my group hasn't finished now creates a mess for you and your workgroup. If you could have found out two days earlier you would have adjusted your work-plan.

The daily coordination meeting is a very short meeting. You'll want to conduct the meeting standing up. And if you have to conduct the meeting on the phone, then get everyone to promise to be standing when they are on the call! No kidding. Getting comfortable will only extend the meeting. Also, no coffee, doughnuts, birthday cakes, etc. This is a meeting to fine tune the work we are doing with each other. It doesn't take more than 15 minutes.

The meeting starts by asking people to report complete on the work promised for the day. "I'm done" or "I'm not done" are the only allowed responses. Only complete work releases work for other people. When someone reports "Not done" ask for a new promise. You'll also want to ask what kept the performer from completing as promised. Record the reason provided for future analysis and removal of the cause of the planning (promising) failure. Record the number of promises completed as a percent of promises made for that day. Graph the results and display the graph where you conduct your daily meeting. Record the reasons for plan failure in Pareto chart fashion (vertical bar chart by reason type).

Next you'll want to ask people if they need any help to complete their promised work. Often constraints will arise in the course of doing the work in spite of the effort given to look-ahead planning. This is also a time for people to announce that they will be doing work identified as workable backlog.

What's the best time to have a daily coordination meeting? It depends: either at the beginning or end of the workday. On construction sites the end of the day works well. It gives people the opportunity to do some re-planning overnight and to authorize some overtime to complete work before the start of the next day. In other settings -- new products development, software, engineering, architecture -- the beginning of the days seems to work well. People are often keeping different work hours. The beginning of the day schedule allows them to fine tune their actions for the day.

Project Meeting Protocols: Weekly Work Planning

The Weekly Work Planning session is the time when performers make promises for the completion of work in front of the other project performers. This public promising is essential to producing reliable workflow. Try a thinking exercise with me to see the advantage of the approach.

Let's say you and I and another four people have working groups of people that we lead on a project together. Each of us manages a team with a different specialty. So we start our weekly work planning conversation by reviewing the promises we are making for completing work day-by-day in the coming week. I start by saying my group will have tasks A and B done on Monday, tasks C on Wed, and tasks D, E, and F on Friday. Independent of me you have planned your group's work. You have your own tasks, but your team needs to coordinate with my group. You might need access to the same physical space or controlled documents. So you ask me, "Hal will your group really be done with task B on Monday?" I say, "Sure will. We're mostly done already." "Great!" you add. "I'll then move up my task G to start on Tuesday and finish on Wednesday."

If we had individually negotiated those work-plans with the project manager you would not likely have found out you could get started early in the week. Further, others on the team may now plan their work based on both the promises I made and the revised promises you made.

Performers (last planners) prepare their work-plans outside the meeting. Each group submits the WWP to the project manager prior to the meeting so that the plans can be compiled into a single plan organized by work-stream.

Start the weekly work planning meeting with a review of the prior week's performance. Go

through the PPC (percent of promises/plan complete) for the overall project and the individual workgroups. Add the data to a graph if you haven't done so already. Have a short conversation about what you might expect in the coming week.

Next, review the Pareto data for the reasons for not completing work as promised. Look for patterns in the data from one week to the next. Examine the data by performer group, as well.

Now, have a conversation about the coming week's work by work-stream not by performer. You want to give attention to how one group's promises connect to other groups' performance. This is critical to establishing a base for reliability. When one performer sees how their promises impact others, then the reliability of promising will improve. Make any necessary adjustments to individual plans so that work flows smoothly from one performer to another. Add time buffers between performers when you can expect unreliability of completion (either low performer PPC or anticipated variability in the project).

Review the workable backlog that has been planned for the coming week. Give people the opportunity to negotiate workable backlog away; for instance, I might plan to do a task that would put the project out of sequence for you. You should have the opportunity to ask me not to plan that work.

Finish the meeting with a Plus-Delta review.

By now you've got to be thinking, "No project work happens that reliably." That's right. Research conducted by the Lean Construction Institute showed that usual teams working from schedules are about 50% reliable completing what they set out to do sometime in the coming week. That is insufficient for coupling one workgroup's tasks to another's. However, people using these protocols are routinely getting reliability of 85% to the day promised. That is sufficient to couple work among performers and workgroups.

There's still a missing piece. The secret is in reporting complete on the work performed. For that we'll take a look at daily coordination meetings.

"There are no problems in this business that can't be addressed with enlightened managing, leading, and preparing."

- Clients are king.
 - Internal initiatives take a back seat.
 - HR problems WILL fester.
 - The people who do well in the firm are those who seek out the attention and resources they need.
 - No one can say for sure what comes first -- the chicken or the egg, the project or the
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- people who can do the project.
- Selling is easy if a client brings a problem or opportunity to the firm.
 - Stars can be your greatest blessing and your greatest curse.
 - You live and die by cash flow.
 - Your worst clients and projects end up with your best people.

Project Meeting Protocols: Look-Ahead Planning

The first protocol is for the Look-Ahead Planning (LAP) meeting.

The point of the LAP meeting is to establish a plan that can be accomplished that closely matches what should be accomplished to meet the overall objectives of the project. I think of this meeting as the occasion for crafting or preparing the set of requests that will be made of the performers in the coming weeks. It is a meeting that the would-be performers attend. Those would-be performers look for the conditions of each up-coming task that would keep them from making a reliable promise at the time that a promise is needed. The lean project community calls those conditions constraints.

There are four objectives for the LAP meeting:

1. Establish the basis for weekly work planning -- promising -- in the coming week including identifying workable backlog.
2. To surface constraints.
3. To secure and manage the promises for removal of constraints.
4. To introduce the performers to the coming work.

A usual look-ahead plan has a six-week horizon. The meeting starts with a review of the coming week. Care is given to assess any remaining conditions (constraints) that would keep someone from making a reliable promise on the coming week's work-plan. The project manager reviews any remaining constraints, the promises for removal, and then with the performers authorizes a set of requests for the coming week.

Next up is looking at week two on the LAP to see what work can be made available as workable backlog. The group evaluates what unconstrained work could be performed early if either a performer gets ahead or if there is some reason that would prevent the performer from doing the work as promised. The planning conversation ends by authorizing some subset of the second week's work as workable backlog. The group understands only the work authorized in the group conversation is to be workable backlog. This keeps people from doing work that could be out of sequence that would cause difficulty or rework for themselves or others.

The conversation then moves to a review of weeks three through five. There are two keys in this part of the meeting. The first is to review the completion of the promises for removing constraints. The second is to surface more constraints. The process of reviewing the coming work for six weeks has the effect of sharpening the group's attention. Invariably, no sooner has the group removed all the known constraints for a set of tasks than someone comes up with more constraints. During this conversation people are asked to make clear promises including completion dates for removing the constraints. People report complete on previous promises. The project manager updates the plan marking those tasks with no constraints "Ready for Promising".

Finally, the new sixth week of the plan is introduced to the group. For many of the performers they will be quite familiar with the new details because they were involved in establishing those plan details. The project manager highlights interactions of performers in the new work and asks them to identify constraints.

The meeting ends with a Plus-Delta (what produced value? and what might produce more value?).

Depending on the complexity of the project and size of the project team these meetings can range anywhere from 30 minutes to 90 minutes.