Project Management Isn’t Enough: Essentials of Effective Sponsorship

May 20th, 2008

Payson Hall
Consulting Project Manager
Catalysis Group, Inc.
Payson@catalysisgroup.com

Sponsored by...

• Catalysis Group, Inc.
• The Boston SPIN
Also brought to you by REALITY™

About Reality:

• Reality is where projects happen
• Reality is a messy place where the unexpected is common
• Reality is bitter medicine for theoreticians who wish the world was different
• Reality is the gold standard against which any proposed process improvement must be judged

“If something isn’t compatible with Reality™
It isn’t worth doing”

The 7 - Item Reality Test

Do your organization’s projects ALWAYS…

1. Deliver what was promised/desired?
2. Meet or exceed stakeholder expectations?
3. Hit defined schedule targets?
4. Require only the resources budgeted?
5. Meet relevant quality standards?
6. Avoid/overcome all risks & challenges?
7. Earn recognition for the team’s efforts?
“YES” to all 7 Items?

My suspicion is that you…
– Weren’t paying attention, or
– Live in a state of denial, or
– Don’t do projects in Reality™

Bottom Line: If your organization’s projects always go well, I don’t have anything to offer you… have a great day!

What is a “Project”?

A temporary effort undertaken to accomplish a defined goal (scope) within specified resource and schedule constraints.
What is “Project Management”?

“…the application of knowledge, skills, tools and techniques to project activities to meet project requirements.”

- PMBOK® Guide, 2004

Project Management isn’t Enough!

Applying Project Management “knowledge, skills, tools, and techniques…” HELPS get projects done, but there are no guarantees…

– The initially defined goals of some projects are impractical/impossible
– Projects may become infeasible over time
– New information or changes in context may make meeting project goals a poor choice
Project Origins

Why Sponsor A Project?

Projects are initiated because someone believes the project is worthwhile. This business decision is usually based on two assumptions:

1. Project can be completed successfully within specified schedule, scope & resource bounds
2. Value of a successful outcome is worth the investment & the risk of failure
What is a “Sponsor”? 

Organizational leader(s) responsible for: 
– Assigning funds & staff (resources) to projects, 
– Setting project schedule goals, 
– Identifying project objectives (scope), 
– Establishing priorities, 
– Reviewing and approving charters and plans, 
– Authorizing changes to project constraints, and 
– Choosing to continue, cancel, or delay projects

A Good Sponsor Provides…

• Clear goals 
• Resources 
• Priorities 
• Support 
• Coaching/Mentoring 
• Guidance 
• Timely decisions 
• Strategic direction 
• Business context 
• Changes to context 
• Validation 
• Recognition

• ACCESS
The Project Manager’s Role

- Understand Sponsor’s goals/constraints
- Establish project management processes
- Lead the team
- Use Project Management processes to define, monitor, & guide the project
- Provide timely and accurate status to support informed sponsor decisions

Validation Cycle

- Senior Management Sponsors
  - Draft Charter
  - Charter
  - Charter Changes
  - Plans
  - Plan Changes
- Project Manager & Team
- Requests for Validation

Objectives, Constraints Clarification, Change
Phases & Guiding Questions...

Define

- Are goals clear?
- Can we describe a credible way to achieve goals?

Plan

- How is it going?
- Are goals still achievable?

Do & Manage

Define

Project Manager

Ask Sponsor:
- What do you want?
- When do you want it?
- What resources will you commit to get it?
- What is the expected value of the completed project?
- If I develop concerns, when do you want to know?

Create Charter

Sponsor

Identify & orient PM
Clarify initial goals, constraints & priorities
Review & approve charter
Decide whether to continue
Plan

**PM & Team**

Determine:
- Work to be done
- How long it will take
- Resources required
- Overall feasibility

Propose charter changes if needed

Document plans

**Sponsor**

Refine goals

Determine acceptable risks

Review & approve charter changes

Review & approve plans

Decide whether to continue

Do & Manage

**PM & Team**

Do work & Manage
- Monitor performance against plans
- Identify & address causes of variance
- Respond to new info
- Revisit plans as needed
- Escalate as needed

Report status to sponsor

Ask for help if needed

**Sponsor**

Refine goals

Determine acceptable risks

Provide organizational support

Review & approve charter changes

Review & approve plan changes

Decide whether to continue
**Evolution Triggers**

**Internal to Project**
- Updated information about
  - Resources
  - Schedule
  - Scope
  - Risks & Issues

**External to Project**
- Changes in business context
  - Strategy
  - Goals & Priorities
  - Resources
  - Sensitivity to Risk

**Question Only Sponsors can Answer:**

Based on the best information we have today, do you wish to continue?
### Sponsorship Issue Resolution

<table>
<thead>
<tr>
<th>Issue</th>
<th>Preparation</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slow/No decisions</td>
<td>Discuss sponsor role as decision maker</td>
<td>Communicate impact of delays</td>
</tr>
<tr>
<td>Changing constraints or goals</td>
<td>Define change management process</td>
<td>Use process consistently</td>
</tr>
<tr>
<td>Discovering invalid assumptions</td>
<td>Document assumptions &amp; review with sponsor</td>
<td>Promptly identify &amp; communicate invalid assumptions</td>
</tr>
<tr>
<td>New Sponsor mid-way</td>
<td>Maintain charter, plans &amp; change log</td>
<td>Confirm charter &amp; approach</td>
</tr>
<tr>
<td>Multiple Sponsors</td>
<td>Discuss goals &amp; conflict resolution with all sponsors</td>
<td>Revisit charter and conflict resolution process with group</td>
</tr>
</tbody>
</table>

### Closing Thoughts...

- No sponsor = no project
- Sponsors initiate projects because they assume project is feasible and worth the risk (based on limited info)
- Use validation as project progresses and definition, approach, and assumptions are refined
- PM doesn’t invent reality - job is to explain it & support informed decisions
- Canceling projects can be good business decisions
- If you shoot the messenger, bad things still happen, people just stop talking about them
Questions?

Thank you!

Payson Hall
Consulting Project Manager
Catalysis Group, Inc.
Payson@catalysisgroup.com