
5 - Decision Matrix Procedure

1. The project manager is responsible for initiating, developing, reviewing, updating, and communicating the matrix. In particular, he or she leads the review discussion of the matrix at all project meetings.
2. The team, led by the project manager, prepares the first draft of the matrix. The first decision matrix is prepared rather quickly. The team refers to it as a tentative plan that is continuously modified. Its accuracy improves as the team learns the project situation firsthand, collects more information, and starts making decisions.
3. The matrix is a dynamic document. Periodically – weekly or monthly, depending on project pace – the project manager and his or her team delete implemented decisions and add new ones, add details to near-term decisions, and ensure that the imminent decisions are on track.
4. The matrix typically contains five to fifteen short-term decision items for the coming one to three months. A few additional important mid-term decision items for the following three to six months are also presented but without detailed information.
5. The success of the decision matrix is due largely to its simplicity, clarity, and brevity. One should never allow a decision matrix document to be longer than two pages.
6. In the Participants column, (A) role is specified only when the decision-making team requires an explicit approval (Approve – “the person who must sign off or veto a decision before it is implemented”). The (R) role is always specified (Responsible – “the person who takes the initiative for the particular decision item, and is accountable if nothing happens in the decision item”). More specific roles (for example, Consult – “must be consulted before the decision is made”) may be assigned later by the decision-making team.

5 – Leading Change by Involving the Team

It been said a million times, but we still forget that the person that knows the most about a job is the one who performs it every day. They do have a vested interest in their job, and when asked for input, although they may be reluctant at first, in most cases will provide some great ideas. If you are working on an improvement that affects all shifts, make sure you involve those on all "off" shifts too.

Also remember that the area team needs to be included in the change process as well. Managers are often threatened by those outside the area 'poking their noses into 'their business.' Emphasize through words and actions that the project team is in place to attack processes, not people.

To illustrate the importance of user acceptance, let's view implementation success using a simple mathematical equation:

'Change' represents the quality of the implementation-how well it technically could bring the desired improvement. 'Acceptance' refers to how well those that use the tool embrace and accept it. Let's rate the two factors (change and acceptance) from one to five, with one being low and five high. A technically correct implementation with a high mark of 5, but with a low user acceptances 1 should be expressed as $5 \times 1 = 5$. An average implementation with high user acceptance, however, can result in much higher overall results. A change rating of 3 and user acceptance of 5 results in $3 \times 5 = 15$. This example illustrates that in order to achieve maximum benefits from any change/ improvement/ implementation, user acceptance is absolutely necessary.

Share the Credit, NOT the Blame

First of all, it is your job to make certain that there is no blame - that every change is a successful one. But when a project goes well, and you have successfully involved users, take every opportunity to recognize users for helping make the project a success. Place deserving users and project team participants in the spotlight whenever possible, allowing them to share the successes and the get word out. It helps build acceptance and ownership.

But when Murphy's Law (anything that can go wrong will go wrong and will do so at the most inopportune moment) ~~when~~ appears unexpectedly, focus on solving

problems, not pointing fingers. You cannot plan for every contingency, and things will not always go as planned. Organizations look for individuals who can take care of problems, not merely point them out and place the blame. Accept responsibility as a team to resolve issues and solve problems. Let the solution begin with you.

Focus on the Execution

After the plan has been developed and the focus shifts to the "just do it" portion of the implementation, be careful not to focus too much on the finish line and forget about running the race itself. All too often, American management's preoccupation is with "making the numbers,- not with the execution. As a Project Leader, focus on the proper execution of implementation plan, and the results will take care of themselves.

Add Value by Doing

All too often, the word "management" implies someone who assigns tasks, coordinates meetings, and documents results. To be a true Project Leader, the shirt sleeves may need to be rolled up and the fingernails get a little dirty. In other words, a good Project Leader also needs to add value by doing work themselves, not simply directing others. There is a delicate balance, however, between doing too little and too much work. Based on the scope and size of the project implementation deadlines, as well as the organizational resources available, the "how much" will vary from project to project.

YOU, Incorporated

In everything you do, behave as though you are in business for yourself. Sometimes it is called 'empowerment,' on other occasions "ownership." You are the entrepreneur, needing to do whatever it takes, not constrained by traditional organizational functions or boundaries, to get the job done right: Employers are expecting more than your back and brawn - they want your brains, too, plus the 'ownership' to make choices in the best interest of the project. The same holds true for your Project team members. As the Project Leader, it is your responsibility to spread the same of ownership and empowerment to those involved in the process.

Summary

Management alone doesn't work, and the Project Manager is an endangered species. In order to ensure long-term survival career success, and continued employment, they must evolve into Change Leaders. By applying some of the leadership strategies you can become a more effective and enhance your value to your organization.

5 - Principle of 'No Surprises'

'No Surprises'

Run your projects on the basis of 'No Surprises'. This means that there should only be one real 'crime' and that 'crime' is to be aware of some impending problem on a project and not to alert anybody to the fact. This applies to anyone connected with the project – leader, team or customer. Mistakes can and will be made and this is all allowed for, but to keep some time-bomb hidden, for whatever the reason, is to cause a major threat to the project and to let down the other people involved in it.

5 – Style: A Matter of Establishing a Level of Trust

The Five Situations – People and Jobs

- Can do the job and wants to do it
- Can do the job and is prepared to do it
- Can do the job and isn't prepared to do it
- Can be trained / instructed to do the job
- Cannot do the job

There is another concept we need to introduce at this point. This is the idea of trusting somebody to do a job. If, when you ask somebody to do a job, you can regard the job as being done, then we will say that you 'trust' that person. Obviously, if this applied to all the people and all the jobs on your project, there would hardly be a need for you at all – the whole thing would go swimmingly and complete according to plan. It is precisely because you generally do not trust some or all of the people on your project that you are needed, and that projects go awry.

What would cause you to trust somebody as we have defined it above? You might trust them because you had worked with them before and knew they could be relied upon to carry out any job. Or perhaps other people whom you trust might have spoken highly of them. Or maybe you would try them out on your project: tell them what you expect from team members – that when you give a person a job you want to be able to assume it will be done – and try them out with two or three tasks. If they perform then you can start to build up trust in them. A good test is to ask yourself whether you feel confident entrusting your reputation to their judgment and performance. Another is that you can identify some solid evidence as to why you believe you can trust them.

If they cannot pass these tests, then you don't trust them. Simple as that. As the project progresses, you may come to trust them. That's a different issue. Also you may trust them on some jobs but not on others. I repeat the test – if you don't feel you can entrust your neck completely to them or have no solid evidence, then for the purposes of this discussion, you don't trust them.

Leadership Style Guidelines

Case	Trust	Don't Trust
(1) Can do it / likes to do it	(A)	(B)
(2) Can do it / prepared to do it	(A)	(B)
(3) Can do it / won't do it	Situation same as (E)	Resolve into (2) or (5)
(4) Can do it with training	(C)	(D)
(5) Cannot do it	(E)	Resolve into (2) or (5)

(A) You trust the person to do the job. Perhaps they've done it before or if not something similar to it. They like doing it or at worst they're putting up with doing it. In short, they're the experts and can make all the decisions internal to the job. Leave them to it. Don't concern yourself with it, other than to tick it off your list on the day when it completes on schedule. Even if something does go wrong we will catch it because of **No Surprises**.

(B) They're doing it, their hearts are probably in the right place, but you're not super-confident that they'll do it right or on schedule. You have to watch them: your neck depends on it. There's no need to bug them to distraction – a bit of a gentle hand-holding will do the trick. If there are decisions to be made then you need to work with them to arrive at the correct conclusion.

(C) They've done other things well in the past and now you're trying them on something new. They've come through on everything so far, but this is a new ball game. Another case of watching them gently, as in (B). Remember that your neck depends on it. You may have a decent relationship with them anyway – from which the trust has arisen – and know what level of monitoring to apply. Decisions can be made democratically as in (B).

(D) They've never done it before and you have no reason to believe they can / will do it. It's back to school, guys. Hand-holding. Inching forward with mini-goals spelled out in detail. Constant monitoring for trouble signs.

(E) Here we have a problem. In fact, we have two problems. First, there is the problem of what will happen to the job that this person was meant to be doing. This job isn't happening – we need to make alternative arrangements about it. Then there is the problem of the person. On at least one of the jobs on our

project this person isn't performing. This potentially means there are others where this is also, or will become the case. We need to determine what we are going to do about this person. But as Project Managers, our first priority is the job. First we have to get the job squared away. Then, as a secondary priority, we can worry about the person.

5 – The Executing Processes (PMBOK)

- Initiation

The Planning Processes Group - Core Processes

- Scope Planning Process
- Scope Definition
- Activity Definition
- Activity Sequencing
- Resource Planning
- Activity Duration Estimating
- Schedule Development
- Cost Estimating
- Cost Budgeting
- Project Plan Development

The Planning Processes Group - Facilitating Processes

- Organizational Planning
- Staff Acquisition
- Communication Planning
- Quality Planning
- Risk Identification
- Risk Quantification
- Risk Response Development
- Procurement Planning
- Solicitation Planning

The Executing Processes Group

Project Plan Execution

The purpose of the Project Plan Execution is primarily to carry out the project plan.

During this process, the project manager and the team must coordinate and direct the various technical and organizational interfaces that exist in the project.

The inputs to Project Plan Execution include: the project plan, including subsidiary plans, such as, the scope management plan; supporting detail such as, requirements, specifications and designs; organizational policies that may control how work is performed and corrective actions. The tools and techniques used in this process include, but are not limited to: management skills such as, leadership; product skills and knowledge; a work authorization system to ensure that the work is done on time and in the right sequence; status review meetings; a project management information system to collect and distribute information and organizational procedures. The outputs include the actual work results and any requests for changes to the project plan identified during execution.

Team Development

Given the high level of interdependence on complex projects, success requires people to work effectively together as a team.

Everyone is dependent on others to complete their individual activities on time, and meeting the overall project objectives is dependent upon all team members performing according to schedule. Team dynamics can work for or against project success. The relative effectiveness of teamwork can become the deciding, although intangible, factor in project success or failure.

The inputs to the Team Development process include: the project staff, the project plan, staffing management plan, performance reports and external feedback on team performance. The tools and techniques used in this process include, but are not limited to: team building activities; general management skills, such as leadership; reward and recognition systems; collocation of team members and training. The outputs of this process include: performance improvements and input to performance appraisals.

Information Distribution

Ensure all key project stakeholders receive the information they require in an effective and timely manner.

The Information Distribution process implements the communications management plan developed during communication planning and also responds to unexpected requests for information.

The inputs to Information Distribution include: work results; the communications management plan and the project plan. The tools and techniques include: communication skills, information distribution systems, such as fax, e-mail, and voice mail; and information retrieval systems such as filing systems, project management software and electronic application components. The outputs are the communications themselves along with the records of those communications.

Quality Assurance

Prevent quality deviations from occurring thereby assuring the quality of project processes and products.

Quality Assurance is all the planned and systematic activities implemented within the quality system to provide confidence that the project will satisfy relevant quality standards. This is accomplished in great part by reviewing project deliverables and testing processes prior to implementation.

The inputs to the Quality Assurance process include: the quality management plan; results of quality control measurements and operational definitions. The tools and techniques include: benefit-cost analysis; benchmarking; flowcharting; design of experiments and quality audits. The outputs are quality improvements.

Scope Verification

Formalize stakeholder acceptance of the completed project scope.

Project stakeholders, including project customers and end users, must review the results of the project in relation to the project scope and provide final acceptance of project deliverables.

The inputs to verifying the project scope are: the work results and documentation which describes the product, such as, plans, specifications and drawings. The tool and technique used in this process include, but are not limited to: inspection through, for example, measurement and testing. The output of this process is the formal acceptance of the product by the customer and other stakeholders.

Solicitation

Obtain information from prospective sellers for project-related goods and services.

Most of the work performed during this process is actually completed by the prospective sellers responding to the solicitation.

The inputs to the Solicitation process include: procurement documents, such as, bids and proposals and the list of qualified sellers. The tools and techniques include: bidder conferences and advertising. The output of this process is the receipt of proposals from prospective sellers.

Source Selection Process

The receipt of bids or proposals and the application of the evaluation criteria to select a provider.

The purpose of this process is to identify and select the most qualified seller from the list of potential candidates.

The inputs to the source selection process include: proposals from sellers; the seller evaluation criteria; and the organization's procurement policies. The tools and techniques in this process include, but are not limited to: contract negotiation; weighting and screening systems; and independent estimates. The single output is the contract awarded to the selected seller.

Contract Administration

Ensure that the seller's performance meets contractual obligations.

The extent and complexity of this process can vary greatly depending upon the project. Coordination among sellers and integration of the contracted services with other project deliverables can require extensive effort that should be managed using a project management methodology. Regardless of the extent of outsourced work, contract administration always has the legal implications and should be performed by someone knowledgeable in the field.

The inputs of Contract Administration include: the contract; work results; requests for changes to the contract and the seller's invoices for services performed. The tools and techniques include: a contract change control system; performance reporting and a payment system. The outputs include correspondence, changes to the contract which have been agreed upon and payment receipts.

The Controlling Processes Group

- Performance Reporting
- Overall Change Control
- Scope Change Control
- Schedule Control
- Cost Control
- Risk Response Control
- Quality Control

The Closing Processes Group

- Contract Close-out
- Administrative Closure