Smoothing the Turbulence:

Project Management Strategies for the Changing Workplace

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Shifts in workplace culture, technology, and legal and regulatory requirements, along with diminishing resources, create pressure for organizations to change. Because projects can be brief and focused toward a particular change, opportunity, challenge, or problem, they are a good strategic tool for such turbulent settings. Here are several strategies for managing projects to success.

The Project Management Institute (PMI) defines project as "a temporary endeavor undertaken to create a unique product, service, or result." Many records and information management (RIM) professionals are involved with projects as sponsors, managers, or participants. There have been projects as long as there have been organizations that undertake deliberate, results-and-outcomes-oriented work. But in recent years, the number and importance of projects seem to have increased. Why?

Organizations experience a constant state of flux and change. Traditional organizational structures and management approaches are typically geared more toward steadiness and continuity than toward change and innovation. More reliance on projects can help address this situation – projects can be focused, time-limited, and geared toward a particular change, opportunity, challenge, or problem. They are relatively quick to organize, get their assigned work done, and then disband – a good, economical strategic tool for turbulent settings.

Projects can be used to move programs into new areas. For example, they can probe new customer or service areas or develop and test new products. This is an important strategy for dynamic businesses in fast-changing environments.

Executives have rising confidence in project management. This is partially because of the work of the PMI in producing standards and solidifying the status of project management as a professional calling.

Projects are consistent with newer styles of management. In particular, these include:

- Matrix management, where employees report to more than one boss simultaneously
- Employee empowerment, which gives lots of leeway and room for initiative in getting things done
- Knowledge management, which includes emphasis on intellectual capital and creativity

These management styles tend to bring together people with different backgrounds for intensive work that requires creativity and aims to produce something new.

Projects may be suited to hard times. They work well when organizational capital is scarce, the need to move forward and try new things is urgent, and temporary *ad hoc* procedures are employed as expedients.

Projects are becoming increasingly complex and challenging to manage. Stakeholder expectations may be difficult to define, unsettled, or subject to change while the project is underway. Shifts in information technology, new ways of networking, such as social technologies, the changing workforce, and changing legal and regulatory requirements, all introduce uncertainty. The fiscal climate and tight resources produce pressure to carry out project work quickly and economically.

At the same time, the stakes are high. Projects carried out more or less unilaterally by the RIM program determine new dimensions and directions for its future. Projects carried out in partnership with offices (e.g., corporate counsel or chief information officer) affect the management of information resources generally, including records. Executives monitor projects closely and are particularly concerned with ensuring they come in within budget, on time, and with the features specified in the project plan.

Strategies for Success

RIM professionals involved with projects should expect positive reactions when they are successful, but negative reactions to those projects that come up short, particularly if they finish long over deadlines and beyond their budgets. The following strategies will help ensure projects fall on the positive end of that spectrum.

Align Projects with Business Objectives, Priorities

Projects need to be aligned in some obvious ways to the organization's goals and priorities, a particularly important factor in getting resources and support in tight financial times. This is true even for small or modest-scope projects which, in times of more resources and less scrutiny, might have been planned and acted on without a need to make this added argument of how the project dovetails with organizational objectives.

But the challenge may be even greater than that. Projects may be expected to contribute to pushing the enterprise into new areas, transforming the business, or developing new relationships with customers. This presents an added burden, but also offers an added opportunity to the project manager who may, in effect, get the

project to do double duty: accomplish its stated goals and build new relationships or program dimensions.

Apply Intense, Hands-On Management Skills

Management is often defined as getting things done through other people. But traditional management, geared to long-term program administration where time is on the manager's side, may not be up to the challenge of fast-paced, high-pressure RIM projects. Managers need well-developed skills in inventiveness, systematic communication, and organizing and motivating individuals to function as part of a team.

They also need to be:

- Focused – There is a need for concentrated work to get projects done on time and up to standards.
- Flexible – Often, project planning fails to anticipate every eventuality, so the manager has to understand when there is a need to make changes.
- Patient – Patience must extend to project team members and project sponsors, who sometimes change things mid-course.
- Decisive – Often, there is a need for hard decisions without much time to gather all the relevant evidence, carefully weigh all the possible consequences, or consult extensively with everyone involved.
- People-focused – Teams often involve people with different personalities, operating styles, goals, and agendas. This requires a good deal of coaching, encouraging, negotiating, and, occasionally, correcting, on tight schedules because project deadlines need to be met.
- Goal-focused – Sometimes, the manager has to emphatically remind project team members of the purposes and goals of the project as a means of moving things along.

Accelerate Project Work

Careful project planning and effective oversight and review are essential. At the same time, though, there is increasing emphasis on shorter projects carried out faster with less time between needs identification and results than in the past.

Chris Murphy, in his article "IT Is Too Darn Slow," which was published in the February 2011 issue of *InformationWeek*, discussed CEO impatience with information management projects generally. "... business just can't move without IT anymore," he notes, and "velocity is more important than perfection." Management may expect what used to be year-long projects to be finished in 90 days, Murphy wrote.

RIM project managers are facing similar speed-up pressures and need to find ways to accelerate their work. Robert Wysocki, in *The Executive's Guide to Project Management*, advises:

1. Relax requirements for rigid adherence to defined processes, tools, and templates.
2. Eliminate long status reports and status meetings with no agenda.
3. Encourage project team members to take initiative in solving problems.
4. Avoid micro-management.

To speed up projects, Wysocki suggests project managers should:

1. Emphasize empowerment accompanied by accountability and responsibility.
2. Make exceptions to defined processes when justified.
3. Resolve issues and problems on the spot through conversation.
3. Promote information sharing via electronic communications rather than meetings.
4. Make meetings purpose-driven with an agenda and time limits.

Why Projects Fail

This article is about project success. But, it is also useful to review why projects may fail. Some underlying causes include:

- Stakeholders/clients/customers were not fully supportive or centrally involved in the project.
- Project manager lacked leadership and management skills, neglected to effectively lead the team, and failed to manage end-user expectations.
- There was "cognitive bias" on the part of the project manager – overconfidence; selective perception and giving greater weight to evidence that confirmed manager's viewpoint; "groupthink" (reaching a consensus too soon and discouraging dissenting views); illusion of control (underestimating factors beyond the project manager's control).
- Project team did not function well because team members did not feel a sense of commitment, and motivation and empowerment were weak.
- Required information gathering and analysis were inadequate because the project was rushed, overconfidence made them seem unnecessary, or customers/users did not make enough time to enable the project manager and team to develop them in detail.
- Risk was not adequately assessed, incorporated into the project plan, and managed during the project.
- Scope changed during the project, particularly incremental "add-on" features, which turned out to be more time consuming, expensive, and complicated than expected.

Incorporate Risk Management into Project Management

Even with the emphasis on projects that are designed and carried out quickly, there is another, partially countervailing, trend: Make risk management an integral part of project planning and execution. The PMI defines risk as "an uncertain event or condition that, if it occurs, has a positive or negative effect on the project's objectives." Risks with a potential positive effect are fortuitous and welcome, but seem to be rare. The other type of risk – one that has the potential to slow down, stall, or derail the project – seems much more common.

The PMI's Practice Standard for Project Risk Management recommends several strategies: identify risks; perform qualitative and quantitative risk analysis; plan risk responses; monitor and control risks; and respond to risks if they occur. This methodology is fine as far as it goes. But these days, projects have inherent risks that are difficult to anticipate and manage, for example:

- The fiscal climate and competition results in a new CEO and executive team with cascading changes in information policy and project priorities.
- Institutional down-sizing suddenly eliminates key project team members.
- A new technology suddenly appears on the horizon or on the scene, necessitating a quick change of plans.
- Budget resources suddenly get tighter.

Consequently, project risk management has become more difficult. It is impossible to anticipate all project risks, but these strategies may be helpful:

Prioritize risks. This step is helpful both during planning and carrying out the project. Some risks may make the project manager uneasy; others may push that feeling to the level of anxiety; and still others are major disruptive events or even show stoppers. Small risks that may seem self-contained and unlikely to grow can often be ignored; mid-level risks can be managed with patches and workarounds; and major risks necessitate substantive intervention. The point is that not all threats are equal, and project managers need to set priorities.

Even for small projects, it may be useful to assign individual team members with the responsibility to monitor potential risk areas ...

Communicate about risks. Often, an individual involved with the project sees or senses that something is about to happen, but doesn't inform the project manager. Project managers must discuss potential risks in meetings with stakeholders and project team participants. What are the signs there is something on the horizon that may undermine the project? What does the evidence suggest about the potential magnitude of the risk?

Assign "risk owners." Even for small projects, it may be useful to assign individual team members with the responsibility to monitor potential risk areas, even if they are broad and a bit open-ended, with the hope these individuals will provide foresight of looming risks taking shape in the area.

Stay Flexible, Learn, Improvise

Traditional projects usually follow what is sometimes called a "waterfall" model – define requirements, develop a plan, carry out the project, test, and deliver to the customer. But this systematic,step-by-step approach may not be a good fit for fluid projects in changing environments.

Today, many projects push into unexplored areas where neither the extent of the complexity, nor the potential range of solutions, is apparent going

Suggested Reading

The following titles provide additional information on project management:

- Cleland, David, et al. *Project Management Circa 2025.* Newtown Square, PA: Project Management Institute, 2009.
- Cobb, Charles G. *Making Sense of Agile Project Management.* New York: Wiley, 2011.
- Dinsmore, Paul C. and Jeannette Casbanis-Brewin, eds. *The AMA Handbook of Project Management.* New York: AMACOM, 2010.
- Freedman, Mark and Raphaël Desi. *Large-Project Management: A Blueprint for Success.* Boston, MA: Boston Consulting Group, 2011. *www.bcg.com/documents/file76656.pdf*
- Project Management Institute. ANSI/PMI 99-001-2008 *A Guide to the Project Management Body of Knowledge,* 4th ed. Newtown Square, PA: Project Management Institute, 2008.
- Project Management Institute. *Project Management Journal. www.pmi.org*
- Mantel, Samuel J., et al. *Project Management in Practice.* New York: Wiley, 2011.
- West, Dave, Tom Grant, Mary Gerush, David D'Silva. *Agile Development: Mainstream Adoption Has Changed Agility.* Cambridge, MA: Forrester Research, 2010. *www.forrester.com/rb/Research/agile_development_mainstream_adoption_has_changed_agility/q/id/56100/t/2*

into the project. That makes the traditional project management approach difficult to follow in all cases.

Project managers need to be *flexible*, knowing when to follow the project plan and when to refine or adjust it.

They should be *improvisational*, being able to develop new solutions when the project encounters unexpected issues or problems for which there are no applicable standards or formulaic solutions.

They should apply *experiential learning*, drawing insights from the project, quickly assessing their meaning, and using them to adjust the course of the project.

They should carry out *after-project reviews* to determine where a project exceeded expectations, where it fell short, what this reveals about project management techniques, and how these conclusions can be quickly plowed back into the next project and subsequent ones.

Practice Agile Project Management

For some projects, the picture is even less clear. The needs and expectations of sponsors, stakeholders, and customers are likely to evolve as the project is under way. Unanticipated challenges, opportunities, and threats are likely to suddenly appear. A few years ago, an alternative approach to the waterfall model, often referred to as the "agile" method, was delivered and applied initially to software development projects. Now, its central tenets are being adapted to other projects.

An *agile approach* breaks a big project into multiple mini-projects or iterative planning/development cycles. The work is fast-paced and, usually, the client/customer works alongside the project team or is part of it. This allows the project to constantly evaluate the evolving product and obtain immediate feedback from team members, users, and stakeholders. It often relies on cross-functional teams to adapt the methodology to the issue at hand rather than trying to force-fit the project to traditional methodology.

Agile approaches work best for projects where the customer may be having a hard time articulating requirements or the requirements are fuzzy, the customer wants to actively participate throughout the project, the project can be broken down into discrete parts, and there is constant feedback.

Incorporate Social Media Technologies

There has been an upsurge in use of social media technologies (e.g., wikis, blogs, and podcasts) as more and more "millennial" employees (those individuals born in the 1980s and 1990s) join project teams.

The author of *Social Media for Project Managers,* Elizabeth Harrin, points out that social media are particularly well suited for communication (keeping everyone up to date on issues and project status) and collaboration (people working together, sometimes on virtual teams where individuals can be located in dispersed locations or, in fact, anywhere around the world).

Social media tools enable people to quickly surface, share, comment on, and incorporate ideas into project work. The forums enable people to share partially developed ideas and bits of information that may, in turn, help other members of the team flesh out their own ideas. They give people a chance to have input on areas of the project where they might not otherwise be involved.

There is also the potential to improve morale and motivation through building a sense of community via the social media site. Project blogs are particularly useful as central

project management forums. But, Harrin also advises that using social media in projects introduces its own set of management challenges, including:

- Training people in the use of social media tools so they can use them effectively
- Establishing clear guidelines for project team members who will be using social media tools. This may need to include a policy on what is deemed to be acceptable and unacceptable use of social media tools; explanation of what monitoring takes place; and discussion of what information is considered confidential.
- Providing for site management, including archiving policies and retention policies (particularly important for legal reasons because the information may be needed as part of a lawsuit or regulatory investigation). "All of this data needs to be archived and filed effectively," says Harrin.

Deliver, Measure Project Results

It is essential to agree on the final outcome to be produced by the project before it begins (e.g., the functions of the new system, features of the new website, specifications of records schedules, and procedures for handling e-discovery).

Two caveats exist for projects that are rushed or depend on fluid, ever-shifting information technology applications.

First, client/customer desires and expectations may shift, necessitating adjustments to the project. If that happens, the project manager needs to keep revising the common understanding of what the project is supposed to accomplish so everyone can agree at the end on whether it did it or not.

Second, it may be difficult to measure the results of a project right after it concludes because it may take some time for individuals to test the new system, get used to the new procedures, or otherwise adjust to the changes wrought by the project. That may necessitate evaluating results and impact some time after the project ends.

Challenges Bring Opportunities

Project management will continue to be a central aspect of RIM work. RIM professionals need to apply standard project management practices, but also customize and improvise to make these standards fit the projects at hand.

Successful projects will build and strengthen the RIM program, carry it into new areas, and foster partnerships between it and other business units. The challenges are daunting, but the opportunities are also very exciting. END

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GARP® Series: GARP®: A Tool to Drive Internal Auditing page 22

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Smoothing the Turbulence: Project Management Strategies for the Changing Workplace page 28

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Drawing a New Battle Plan for Conquering Key Information Risks page 35

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RIM Fundamentals Series: Audit to Ensure RIM Program Health, Growth page 40

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Creating Successful Virtual Teams in a New Age page 44

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