



Benchmarks and Scorecards: Reporting on Multiple Projects?

by: Alex S. Brown, PMP

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One of the best pieces of advice for any project manager is, “Divide and conquer.” Take a complex, large deliverable, and break it into parts. “Divide and conquer” creates a new problem though: answering the question, “How are we doing overall?” People want to see the forest, not just the trees. Creating an overall status report is a possible solution.

Benchmarks and scorecards are powerful tools for reporting status on any project, but they are especially powerful for projects composed of sub-projects. They can enhance existing status reports or serve as the primary status report.

Benchmarks and scorecards are never easy to implement, but the effort is well rewarded. Each manager has local control over his or her deliverable, and can set benchmark goals independently. Overall management can track progress towards the ultimate goal with confidence and precision. With a step-by-step approach, any project manager can apply these tools to his or her project work. Ultimately, these numeric tools can increase the maturity of an organization, helping a team or department learn from past experience and optimize future project results.

A note on terminology: Different organizations use the terms “programs” and “projects” very differently. This paper will avoid the term “program” entirely. Instead “sub-projects” are parts of a “multiple-project effort” or an “overall project”. “Project manager” means any project manager, while “overall project manager” is someone running the overall project. “Sub-project manager” is someone running a sub-

Step 1: Determine Senior Management Needs

The target audience for these benchmarks and scorecards is almost always senior management. Management typically wants to see regular progress reports, to ensure that goals will be met.

Set a meeting to gather a list of any key data they want to see, and to understand what questions they expect to have answered at each reporting period. This meeting is about senior management needs, and they will range widely, depending upon your management team and the larger organization’s goals. Be open to possibilities.

Step 2: Plan Sub-Project Metrics

Each sub-project contributes metrics to the overall scorecard. Find out what metrics the sub-project managers are planning to collect for their own use. Some sub-project managers may decide to collect no metrics of their own; at this stage nothing is required.

Step 3: Identify Common Metrics

Look for common metrics among all the sub-project managers. Sometimes two managers will call the same metric two different things, or calculate the same basic metric two different ways. For instance, a straight budget calculation of actual costs to-date will usually be greater than an earned-value calculation of actual costs, due to differences in definition of earned and unearned costs. Note areas of possible conflict as well as areas of agreement.

Compare the sub-project manager’s metrics against the senior management

needs. The metrics list may meet some management needs completely, while other management needs have no supporting metrics. Develop a strategy to meet management needs.

Step 4: Negotiate with Sub-Project Managers

With a list of common metrics, conflicting metrics, and missing metrics, it is time to talk to each sub-project manager. At this phase, negotiate changes. Changes at a sub-project level might include:

- new data collection methods
- adding more data elements to the scorecard
- renaming data elements
- changing data collection or reporting tools to achieve consistent results
- establishing concrete definitions of terms (i.e. what does “50% complete” mean?)

Any sub-project manager who decided to collect no metrics must now agree to collect a set of basic data. These negotiations can be difficult; some managers resist standardization. It is critical for the overall project manager to have a simple set of basic data needs, and to know exactly why each piece of data is necessary. The overall project manager should be prepared with advice and practical help to begin data collection.

Gaining passive acceptance at this phase is not enough; cooperation and understanding is required. Resistant managers can misreport or report late during the project execution, as a form of passive resistance. Wherever possible, try to

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President's Message

by Ed Miller, PMP

The challenging economic climate notwithstanding, PMI remains financially strong and continues to grow with the 100,000th member joining in January. The same is true for our New Jersey Chapter and we now have over 2500 members. Many are attracted to PMI because of the growing recognition of the Project Management Professional (PMP) certification. Although PMI membership is not required to obtain PMP certification, the exam fee structure provides an incentive to join PMI. In response to the demand for PMP information, we provided two programs (one in December and another in January) focusing on PMP certification and the PMP exam. Ava Heuer and our volunteer instructors have also increased the capacity of our PMP Exam Prep Course, which we offer three times each year, from 30 to 50 students. If you are a

subject matter expert in one of the PMBOK areas and are interested in teaching, please contact Ava.

As I mentioned in the last newsletter, we would like to find appropriate ways of contributing to non-profit community service or charitable projects in New Jersey. I urge all of you to look around your communities and see if there are worthy projects that would appreciate planning reviews, project oversight or other PM pro bono services. I believe that many of our members would welcome the opportunity to apply their expertise in order to benefit our communities.

While I am on the subject of volunteering, we would also like to try holding some smaller, less formal meetings than our regular dinner meetings. Perhaps we could try a round table discussion at breakfast or lunch at a few different locations. If any of you would be willing to lead such a meeting, please contact me or any other board member.

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Unconstrained Thinking: Walking the Squawk

By Frank Patrick

"Leadership should be born out of the understanding of the needs of those who would be affected by it." -- Marian Anderson

While ago, a discussion list I participate in carried a thread about how to engrain and assure appropriate behaviors in management of a project organization. The following had come into my inbox from a different source, and for some reason I thought of that thread...

"There's a story about an MIT student who spent an entire summer going to the Harvard football field every day wearing a black and white striped shirt, walking up and down the field for ten or fifteen minutes throwing birdseed, blowing a whistle, and then walking off the field. At the end of the summer, it came time for the first Harvard home football game, the referee walked onto the field and blew the whistle, and the game had to be delayed for a half hour to wait for the birds to get off of the field."

A clear demonstration of the power of consistently walking the "squawk."

There's also a story from personal experience with a client that shows how deviating from the promised behaviors can get management into trouble. It happened in an implementation of Critical Chain-based multi-project management at a telecom equipment firm building systems of integrated hardware and software. Critical Chain training was given to management first (since they had to have the ability to "walk the talk" from the get-go), and then to members of the project teams as the projects were revisited for completeness of plan and alignment with the multi-project processes.

One of the key concepts demonstrated by games and simulations in the training is the idea of the "project as relay race," as opposed to the usually date-driven metaphor of a train. The team picked up on this idea with a vengeance -- so much so that they went out to the local sporting goods

store and bought a set of relay race batons, which were painted brightly, and attached to a rope so that they could be hung on a doorknob or on the entrance to a cubicle. The batons were passed along from resource to resource along the critical chain (the resource-leveled critical path) of the project, the idea being that if the baton was in sight, you were not to interrupt it's carrier/keeper and instead address his/her supervisor with issues that might normally be addressed by that person. This allowed resources on the critical chain to work with head down, uninterrupted, and protected from pressures to multi-task, thereby speeding the project around the track from critical leg to critical leg of the race to the cash register.

Well, the story comes to a climax when one of the managers forgets his promise to the team -- the promise to support "relay race behaviors" and to help "drive out multi-tasking" among project participants.

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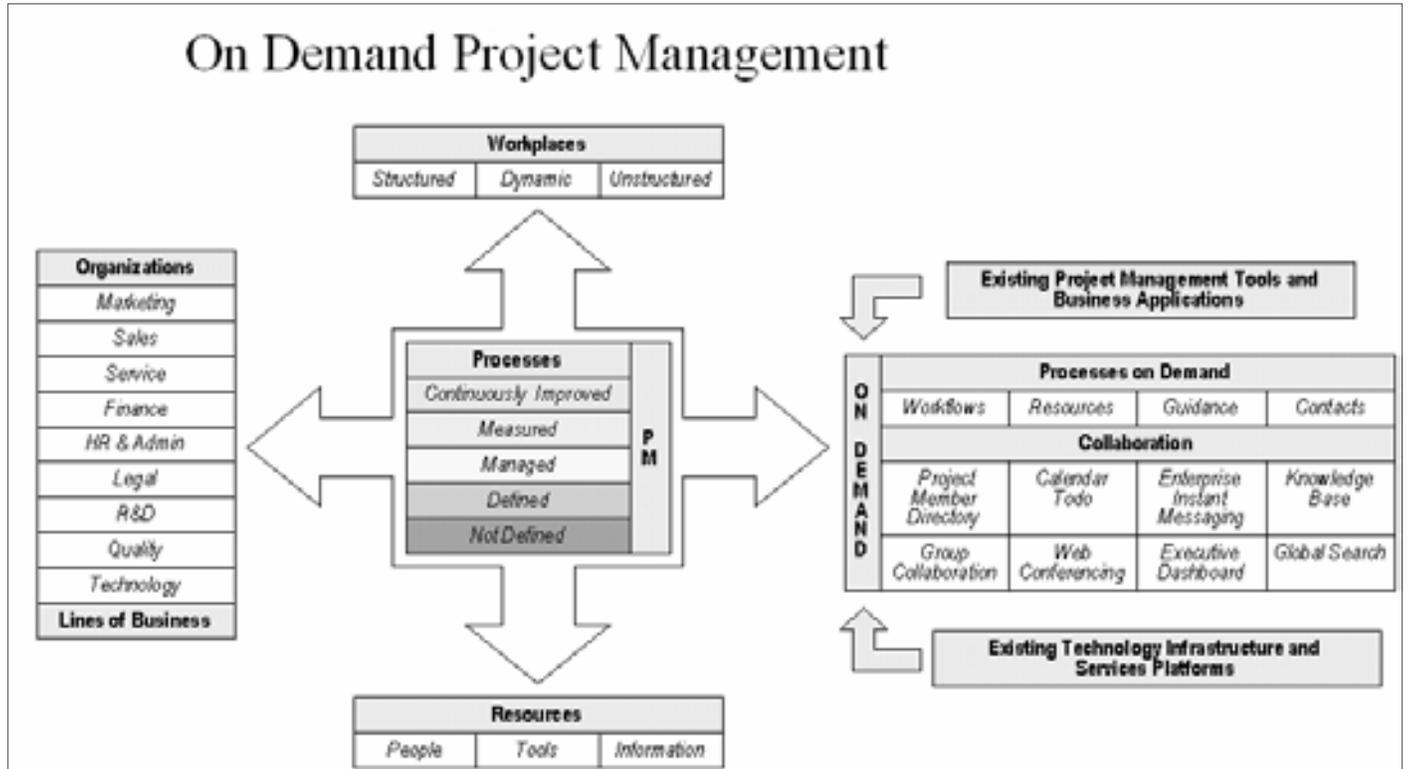


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ON Demand Project Management

By Mark Perry and Chris Bartlett



On Demand Project Management is the integration of both the existing project management tools and business applications used by practitioners and the existing technology infrastructure and services platforms of their organizations into a defined project management process. On Demand Project Management will change the way we do project management, the way we work on projects, and most importantly, the results we get from project management.

What exactly is On Demand Project Management? On Demand PM is the integration of “all things useful” into an easy to access, use, and improve project management process. It provides access to process descriptions and such things as scalable workflows, work step guidance, and resources suggestions to help participants in the project management process do their work. Skilled as well as occasional practitioners are able to follow best practices with a useful and usable set of tools that can be accessed, when needed, without training or complex systems configuration.

How does this change the way we work on projects? On Demand PM allows people in organizations with all kinds of workplace environments to work on projects together, speak the same language, and follow the same workflow steps. On Demand PM provides guidance and access to not only project management tools, templates, and instructions, but to communications, collaboration, and knowledge base resources as well. Just think of the possibilities. Many organizations

already have a portfolio of user applications and enterprise services from office applications, to scheduling and planning tools, to communications platforms and knowledge bases not to mention other services like enterprise instant messaging, web conferencing, enterprise global search, information portals, and many others. Who knows what’s out there and how to use it? How well are these resources integrated into project management today? With On Demand PM, all of this stuff works together because the tools and technologies are integrated into the project management process and not the other way around. Hence, diverse workplace professionals will now know what capabilities exist, because On Demand PM shows them, and they can choose the approach and tool sets that best meet their project management needs – from PM templates to complex scheduling tools, from normal email communication to enterprise instant messaging and group collaboration, and from traditional face-to-face project team meetings to on demand web conferencing.

How does this improve the results we get from project management? On Demand PM will improve project management results in a number of ways. Organizations will experience a reduction in the number of projects that fail to complete, finish late, or finish over budget. Additionally, On Demand PM will enable organizations to understand why projects are late and to take corrective action be it changes in processes, available resources, or skills of the practitioners.

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On Demand Project Management (con't)

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Similarly, On Demand PM will provide insight on why projects finished ahead of schedule and under budget and how best to ensure such performance can be achieved in other projects. On Demand PM also provides process owners and caretakers with the ability to manage their assigned process areas and act upon lessons learned feedback so that approved improvements can be quickly and continuously made rather than waitlisted for work in someone else's job queue. People will work faster, smarter, and better and everyone will have a relentless focus and responsibility in getting it right. The old adage, "fool me once, shame on you; fool me twice, shame on me" will now be opined as "experience a PM defect once, shame on the process; experience the same PM defect twice, shame on me" as (i)mprovement in the On Demand era first originate with the letter I.

What can we expect to see in the future for project management? On Demand is the future for many things. Workplaces will continue to become more dynamic and more diverse. Technologies and services will also become easier to

use and more pervasive. On Demand PM will be the way in which organizations will autonomically follow their project management processes and improve their performance as knowledge workers go about their daily tasks requesting what they need, when and where they need it, and what to use to share it all with others.

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Unconstrained Thinking (con't)

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This manager keeps interrupting one of the project players assigned to a critical chain task, bringing the engineer into meetings, and asking for reports on non-project efforts - meetings and reports that could be easily addressed by other members of the team. The engineer eventually reached the end of his patience, picked up the baton, and asked the manager if he had some place to put it -- some place very personal and potentially painful -- since it was obvious that the manager didn't respect the baton or the promises it embodied.

In a follow-up session with the client team, when I was told this story, my reaction was only slightly conflicted. On the one hand, I'd be the last one to condone physical violence or threats of it, but on the other hand, it was clear that the engineer had gotten the message that the manager had not. Project participants, once they discover how much they can

achieve if allowed to work in a single-tasking state of flow, are loathe to allow managers to take that high-performance environment away. Admittedly, it takes managers a bit longer to feel the real benefits, as they might need to see to believe the enhanced pace of project completions and unleashed capacity that results, but for most, effective education, indoctrination, and simulation allows them to suspend disbelief long enough to effect improvement, by walking the talk.

For those that don't, there are always the batons.

Think about it . . .

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(Unconstrained Thinking columns are archived at:*

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The Project Office: Mastering the Art of Change Management

By Glenn R. Melendez, PMP

Organizations that turn to the project office to develop and implement project management standards, processes, and best practices may be missing the most important point. While proven tools and techniques are critical to the success of a project office, by themselves they are useless. The ability to influence change within an organization may be more important than the changes themselves. After all, what good is a treasure chest of standards, processes, and best practices in an organization that continues to follow the “standard du jour”? Let’s take a look at some creative ways to help improve your organization’s ability to integrate best practices into their daily routines.

The KIS Principle - While a comprehensive methodology is critical to the success of your project, keeping it simple (KIS) is the best way to achieve measurable results. Organizations that plunge into the creation of a comprehensive project delivery methodology are ripe for methodology suicide. The KIS principle places emphasis on simplicity by integrating change in small increments. The project office must strive to provide project managers with an abridged set of guiding principles that are practical and user friendly. Managers must have the equivalent of “Cliff Notes” in order for any methodology to serve its intended goal.

Try introducing no more than five best practices per month. Distribute the set as a package and allow your organization four weeks to incorporate the new standards into their routines. Initially, focus on those practices that are simple and will yield the greatest results for your organization. Each month track and report compliance. By year-end you’ll have sixty best practices in place and a methodology that serves to collect more than just dust.

Encourage Creativity - The development of a project delivery methodology alone is only half the job. We must look for new and creative ways to implement a set of standards. The focus must turn from design to implementation where gaining support can make a world of difference.

Experiment with incentive programs that reward compliance. Develop healthy competition among project team members that focus on incorporating project delivery standards into their daily routines and reward those project

teams that play by the rules.

Using Monopoly money, try establishing each project team as a mock “investment entity” allowing employees to “invest” in projects that follow enterprise standards. Reward those project teams that show strong “investor confidence” as they are well on the way to delivering on-time and within budget. Project teams that lack “investor confidence” may signal a need for project intervention to get them back on track.

Be a Team Player – The project office is not the place for the “Ivory Tower” consultant. An effective project office is staffed with project management practitioners. These organizations are well grounded in the work that is being performed because they are not afraid to get dirty.

But getting involved serves another purpose when it comes to effective change management. Getting involved positions the project office as a part of the team versus an organization that makes burdensome demands. As a valued team-member

you are more likely to gain the support of your peers – without it you’re fighting a losing battle.

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“Organizations that plunge into the creation of a comprehensive project delivery methodology are ripe for methodology suicide.”

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Another Football Season Is Over!

Did you Notice all the Project Management Going On?

Commentary by John Pinghera, PMP

What!! You didn't even think of project management while you were watching the games? (Maybe it's the commercials that kept you laughing too much!) To be honest, many people wouldn't equate football to project management. However in reading the sports pages, there is a growing recognition that there are major similarities between football coaching and program / project management. Looking at them might help us all think differently about managing our own projects.

For this article, we'll make the following comparisons:

- Head Coach = Program Manager
- Assistant coaches = Project Managers for planning
- Quarterback = Project Manager for project execution
- Football team = a Project Team, comprised of specialists, that can vary each week
- Football game = a temporary endeavor undertaken to create a unique product or service.

In the case of an NFL Football team, the coaches and players are expected to plan and successfully execute a minimum of 16 projects each season, generally one every Sunday. Reading articles about Jim Fassel, head coach of the NY Giants, Bill Walsh, former head coach of the San Francisco 49'ers and Bill Parcells, head coach of the Dallas Cowboys, it is clear that head coaches are more like business executives today than they have been in the past.

Program Office

An NFL Football coaching staff and their weekly preparation for each game are like a program office, responsible not for just one game, but the entire season.

Like any good program office, they perform post project reviews after each game, whether they win or lose. In fact there is more attention often paid to the ones that got away. The coaches capture project histories and lessons learned for use in preparing for the next game. These histories are documented on film and categorized for quick and easy access whenever needed. Individual plays are also filmed, sorted and coded for re-use by coaches.

Bill Walsh has said, "The role of the head coach begins with setting a standard of competence. The head coach must be able to function effectively and decisively in the most stressful situations." Does this sound familiar, maybe like most program managers whom you met? (The good ones anyway!)

Project Planning

Each week during the season, Jim Fassel takes the NY Giants coaching staff through 6 days of intense plotting to play 3 hours

of football. He says "as coaches, what we do is put our players in the best position to win and hope it helps them execute".

One of his techniques is called "Game Plan Tuesday". This is a pre-defined 17-hour planning session where "the meat of the game plan (for the week) is done".

The average Game Plan prepared each week contains 125 pages of offensive plays and another 100 pages with defensive plays. This is their Work Breakdown Structure for the next game to be played.

Some of the major activities on Game Plan Tuesday include:

1. Scouting reports on the opposing team – first attempt at "defining the problem" to be solved
2. Offensive coordinator planning – to work out specific running and passing plays, which is really WBS decomposition
3. Defensive coordinator planning – concentration on basic defenses for first and second downs, more WBS decomposition, with focus on low risk plays
4. Review the practice schedule and injured list – basically staffing this week's project team with starters and backups
5. Offensive coordinators (again) – focus on third down plays to run or pass the football
6. Defensive coordinators (again) – practice defenses looking for specific weaknesses in the opposing team's offense.

The NY Giant coaches bring intensity and focus to planning that is seldom experienced by traditional project managers. (Maybe we should all be grateful.)

There are no clocks on the walls to remind the coaches how long the days are. And a final word on planning from Fassel "You can't let these four walls narrow your thinking".

Risk Management

Bill Walsh has said, "The most important thing for getting things done is the drill." There is a distinction in drills between those skills and techniques that can be taught individually and those that require groups. He is a firm believer in defining specialized plays that are suited to the talents of individual players.

For the Giants, following the marathon planning sessions of Tuesday, there are the intense Practice Days on Wednesday and Thursday. Wednesday usually requires practice of the low risk 1st and 2nd down plays. Thursday is the day to fine-tune the game plan, especially riskier 3rd down plays, for both the offense and defense. There is a smooth transition of plays moving from paper to reality.

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Another Football Season Is Over! (con't)

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Walsh talks about the importance of practicing the riskiest plays, 4th down conversions, and even the “the desperate ones” that might be needed right before the end of a game.

Human Resource Management

Bill Walsh continues “. . . to have a winning organization, it has to be more knowledgeable and competent in dealing with and developing people.” Being prepared starts with identifying the essential skills a team needs to compete effectively. The next step is to create a format to teach those skills.

Another important facet of good management is deciding how to acknowledge your mistakes. This is critical to the coaches who may call a bad play during a game, and to the players who may not execute as was expected of them. Communication is important up and down the organization, with no backlash or finger pointing.

A good head coach must master the fine art of being tough, but persuasive. When others make mistakes, these leaders are humane but won't tolerate laggards. They are even-handed in dealing with their people. They also excel in setting standards for their coaches and players.

Because of the potential for injury at any time, reserve players are expected to practice and be prepared, so that when they get the chance they can perform as well or even better than the injured player.

Any experienced project manager would acknowledge these coaching traits would be ideal in managing their own teams.

Project Execution

On Game Day, it is usually the Quarterback who becomes the project manager on the team responsible to help generate points to win the game.

Sometimes the coaches will use a pre-defined series of plays fashioned together to get points quickly, before the opposing team can assess the action and mount a successful defense. Play-books get worn out during the game. Pictures are taken during each play of the game to fine-tune the action or to identify and counter unanticipated opponent reactions.

Bill Walsh has recognized Joe Montana, as one of the best project managers, to ever lead teams through successful project execution week after week. (Well, he didn't say it exactly that way!) This includes 4 projects called Super Bowls, where successful completion brought rewards of cash, gold rings, and trips to Disney World for the team.

Montana has a rare quality to coolly lead a team to a come-from-behind victory late in the fourth quarter. This quality

would bring fame to any project manager who needed to turn a troubled project around late in the schedule and complete it successfully.

Like many successful executives, he is not the best at every skill needed for the job. Possibly Montana's most stunning talent is his ability to inspire teammates to play better with him than they would without him. He has helped teams to overcome the panic and defeatism that arise from being behind late in a game. Rather than fire up a team to a point of frenzy, he actually brought a sense of calm. The instilling of confidence and pride in team members is the mark of a turnaround artist.

Montana emphasizes prompt communication on the field to make adjustments in play. He knows that you can't wait to get to the sidelines, or for the next planning meeting to fix an immediate problem.

Another recognized trait of a great quarterback is the training and discipline needed to carry out a sophisticated game plan. Coaches know that a team can't anticipate and plan for everything. There will be times, maybe 10 to 15% of the time, when Montana's spontaneous instincts broke loose and changed the game's outcome.

All of these are desirable traits for a project manager be manage team members, stick to the project plan, and to also recognize, when necessary, to modify the plan for success.

Closing

There are examples in other sports of coaches and players who demonstrated great planning and execution that led them to victory. And there are also examples of project managers who demonstrated excellent skills and practices for success.

It might not be expected to bring a PMI coffee mug to Giant Stadium. Other fans in the stands, like the colorful ones with their faces painted blue, or those sitting shirtless in sub-freezing temperature, might not see the connection to project management. But as project managers who may be fans of any NFL team, we can all say to opposing teams “wait till you see our WBS next season!”

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What's Your Thinking Style?

by: Paula K. Martin, CEO, Martin Training Associates
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Most people make the assumption that everyone else thinks just like they do. We lead our teams as if what's going on inside each person's head is the same thinking process – ours. If they don't understand something, there's something wrong with them. Not only is this an ineffective way to lead a team, but it's just plain wrong. According to Ned Herrmann, creator of the Whole Brain Thinking approach and the Herrmann Brain Dominance Instrument (HBDI), there are 64 different thinking styles. We each use a few of these styles as our primary thinking styles, and different people use different combinations of styles which means that a single set of information, everyone is processing that information differently. Add to that our differences in our internal maps of the world, experiences, assumptions and no two people are having the same experience or coming to the same conclu-

sions when you're at the head of the group, expounding on whatever makes perfect sense to you.

The 64 thinking styles can be divided into two broad categories: left-brained and right-brained. The left-brained styles are linear and task oriented. They show a preference for dealing with facts and current reality. The right-brained styles are more conceptual or people oriented. They prefer ideas and group involvement. We can further divide the left-brained category into data oriented (Analytical) and task oriented (Organized) thinking styles.

- People who are Analytical like facts and figures. They value logical thinking.
- People who use the Organized thinking style like structure and process. They learn best in a step-by-step approach.

The right-brained styles are more conceptual or people oriented. They prefer ideas and group involvement. The right-brained styles can also be broken down further into concept oriented (Conceptual) and people oriented (Interactive).

- Conceptual thinkers like generating ideas and creating the big picture. They learn best for exploring possibilities
- Interactive thinkers like emotional involvement with others and experiential tasks. They learn best by interacting with other people on the team.

So, how do we harness this thinking diversity so it can add and not detract from our team? One simple way is to utilize the

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Benchmarks and Scorecards (con't)

(Continued from page 1)

generate goodwill and cooperation among the managers. Avoid creating situations where a single sub-project manager appears to win every negotiation, while everyone else loses.

Step 5: Set Standards

Create a list of standards for the overall project scorecard. Describe who collects what data and when. Responsibilities for each sub-project should be clear and precise. Measurement methods should be exact. For instance, for “percent complete” for tasks, describe your method. Sample methods include:

- Either 0% or 100% - complete or not yet complete
- 0% if not started, 50% when started, 100% when complete
- $(100 * \text{Act}) / (\text{Act} + \text{ETC})$
- Different percentages for each phase of completion: 0% not started, 10% in-progress, 75% almost done, 90% ready for review, 100% passed review

Clear standards are critical for consistent reporting.

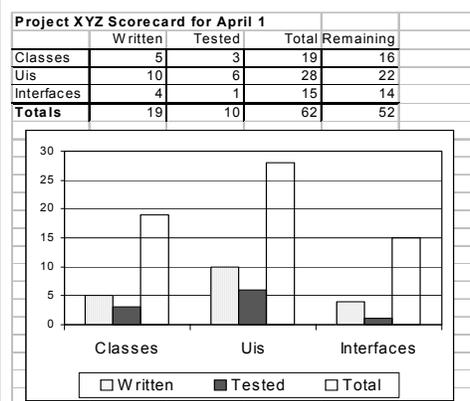
While setting standards, beware of vague standards that are hard to enforce or audit. The overall project manager should be able to verify the sub-project scorecards, at least within some range of certainty, such as $\pm 20\%$.

Networked tools for project scheduling, defect tracking, and work tracking simplify reporting considerably. If the data is networked, the overall project manager can read and report on the data independently. This kind of transparency is a huge benefit in multi-project situations.

Step 6: Create an Overall Project Scorecard

With a standard document in hand, designing the scorecard is straightforward. A few key questions will drive formatting and layout:

- What information is most impor-



Scorecards can combine tables and graphs to

- tant?
- What order will we discuss this information?
- How are we delivering the material (on-line, web, e-mail, text-only, print, projector, etc.)?
- What are the limits of the physical media (color, font size, etc.)?
- Do we need to highlight any key information?
- Do any readers need the data in a particular format (graphical, percentage, table of results, etc.)?
- What formatting or aesthetic standards should we follow?
- Is this report too expensive to deliver?

In general, a good scorecard flows clearly from one set of information to

the next, in the order that management wants to see and discuss it. Data is clear, formatting does not get in the way, and it is easy to scan the page for critical information. Totals are obvious and meaningful.

Time and time again, I have found that management appreciates a one-page scorecard. Sometimes this single page just has summary data. Additional pages can always show the detail. A single-page summary delivers project status at a glance.

Step 7: Create Overall Benchmarks

Certain scorecard metrics will be expected to steadily increase or decrease over time. These metrics are good candidates for benchmarking. Imagine benchmarks as a snapshot of expected values over time, with one expected value for each reporting period. Earned value analysis is a type of benchmarking. Regular status reports show the actual values compared to the benchmarks.

Use this technique for any metric on the scorecard. Set goals for each metric for each reporting period. Management can see with every report whether work is on schedule, ahead or behind schedule, without reviewing hundreds of tasks.

Written & Tested		1-Jan	1-Feb	1-Mar	1-Apr	1-May	1-Jun	...
Classes	Goal	0	0	5	7	10	12	...
	Act	0	1	3	3			
	Variance	0	1	-2	-4			
Uis	Goal	0	1	5	15	20	20	...
	Act	0	2	3	6			
	Variance	0	1	-2	-9			
Interfaces	Goal	0	0	1	3	5	7	...
	Act	0	0	0	1			
	Variance	0	0	-1	-2			

Benchmarks show progress over time, measured against concrete goals. Color helps show that this project is falling behind, and is ready for new benchmarks. [Ed: For reading clarity, the +/- variance backgrounds in green and red, respectively, are not shown.]

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Benchmarks and Scorecards (con't)

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Some advice for creating benchmarks:

- Only benchmark values that change predictably over time
- Benchmark only a few values
- Benchmark values that predict project success and show progress
- Estimate benchmark progress rigorously
- DO NOT assume a linear progression, like “2 per week”
- Publish the benchmarks widely
- Let benchmarks become a motivational tool for teams
- Give sub-project managers control over their own benchmarks
- Total their goals to set the overall project benchmarks

Step 8: Senior Management Approval

Each organization has its own protocol regarding senior-management communication and involvement. No matter what your organization's style, it is essential to present the draft scorecard and benchmarks to management before using them.

This meeting is typically quite formal. The overall project manager distributes the benchmarks and scorecard ahead of time, then reviews it step by step with management. A face-to-face meeting is highly recommended. People need to discuss the documents. Different senior managers may need different information, and it helps them to hear each other defend each part of the report. Removing or changing a scorecard section requires group discussion and everyone's approval.

Changes may be needed in format, benchmark values, or even base metrics collected. Usually the overall project manager can begin using the new report for the next project-reporting period. Management usually is ready to adopt the new report.

Step 9: Update Scorecards, Evaluate Actuals vs. Benchmarks

With each reporting period, metrics change. The overall project manager should set a reporting schedule with all sub-project managers. Report all data as of the same date. Assembling and reporting data for a complex project often takes several days. Data may be old by the time it is published; balance the need for timely data against the need for accurate, well-reviewed data.

The whole project-management team should review the overall results together, before publishing them to senior management. This step ensures that no one is surprised by the results in the report. The overall project manager can reconcile any conflicts between sub-project managers and can make last-minute corrections.

The overall project manager fills in the actuals for the week and compares them against the benchmarks. Any variances should have an explanation.

The overall project manager publishes the scorecards and benchmarks to management. The cycle repeats for every reporting period until the project is complete.

Step 10: Refine and Update

Even the best project manager will have trouble predicting the course of an overall project. Benchmarks are the first to change. Changes in staffing levels, unexpected project events (positive or negative), changes to scope, or changes to estimates all should trigger a review of benchmarks. Benchmarks lose their value as a management and motivation tool if they become too easy or too difficult.

Often the project's metrics change as the project goes through different phases. The overall project manager should monitor overall project activities, to see when a particular metric is no longer relevant or when a new one should be captured. The overall project manager may choose to design a new scorecard for each phase or to keep a single scorecard for all phases.

During project close-out, the project scorecards become part of the lessons learned for the project. The history of scorecards and benchmarks will help the managers of future projects develop their own templates and standards. Often the final scorecard provides useful data for estimating future project work.

Putting Scorecards and Benchmarks to Use

Following these ten steps, a project manager can build useful metrics and tracking tools. Certain principles are important through the whole process:

1. Keep the metrics simple and easy to understand
2. Choose sub-project metrics “scale up” to the overall project
3. Do not force metrics that work for one sub-project onto all sub-projects
4. Watch your math, because not all metrics sum up through simple addition; standard deviation adds using squares, for instance
5. State the uncertainty of the numbers clearly, from the first scorecard onwards
6. When benchmark values and actual values diverge, do not panic; figure out if the project is off-course or if the metrics are deceiving
7. Never, ever adjust the scorecard numbers in order to appear to meet goals
8. Do adjust metric calculations and benchmarks as needed;

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- do so openly, with the consent of senior managers and sub-project managers
- 9. Use articles, research, and experts from your projects domain and from project management research to select appropriate metrics
- 10. Only use sophisticated metrics after gaining experience with simpler metrics, and only if the audience of the reports understand the complex metrics thoroughly.

To summarize: FOCUS ON COMMUNICATION. Ultimately the scorecards and benchmarks are about seeing the forest, despite all the trees. Managers who remain focused on communicating the state of the project “forest” will not get lost in the “trees” of numbers in their reports. Giving senior management the right level of vision, supported by accurate, demonstrable facts, is the ultimate goal of the exercise.

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What's Your Thinking Style? (con't)

(Continued from page 10)

strengths of each person's thinking styles at the appropriate point in the process we're working through. Let's take the MTA decision making process, IOAC, as an example. The first stage in decision-making is idea generation (I). Which thinking styles are going to contribute most at this stage? The Conceptual thinkers. The next stage is organizing the ideas (O). Obviously the Organized thinkers will help us out here. The third stage is analysis (A). We'll utilize our analytical thinkers in this stage and finally, we are at consensus (C) and our Interactive thinkers will help make sure the team is on board both mentally and emotionally.

Educating yourself and the people on your team about the differences in thinking styles, and which thinking styles are most beneficial at each stage in whatever your processes you're following, will help you avoid the kind of conflict that arises when someone is trying to brainstorm when you're at the reach consensus stage.

We know that being effective as a project leader requires a focus on people and communications. Understanding and effectively utilizing the diversity of thinking styles that exist in any team is one of the steps on the journey to being a more effective project leader and team.

For info, see Ned Herrmann's book, The Creative Brain, or www.hbdi.com.

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