Managing Geographically Dispersed Project Teams – Key Solutions & Techniques
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Purpose and take-aways

- We will high-light some key strategies on...
  - …how to plan and organize geographically dispersed project teams
  - …how to effectively implement tools and information systems
  - …how to build an effective communication strategy for team success
So how is the rest of the world doing with PM?

"The number of successful projects have dropped by 10% for the period of 2009 – 2012."

Why is that so?
Why We Exist?

We help to solve the fundamental organizational dilemma of **planning, controlling, and coordinating project activities** through improved technology, shared knowledge, and documentation.

This results in increased operational performance and enhanced competitiveness.
Organizational Dilemma

- Tasks must be divided and allocated
- Individuals’ work must be coordinated

Which leads to the fact that the individual’s average contribution decreases with group size due to increased difficulties of coordinating the work.
How do you manage the white spaces?

- No common process
- No transparent information
- Conflicting goals
- Undefined interfaces and roles
- Different terminology

Common project processes and IT system, clear roles etc.

Geary A. Rummler and Alan P. Brache
What are some key challenges?

- Project Planning
- Communication
- Collaboration
- Roles & Responsibilities
- Processes & Workflows

Are these the same challenges for most projects? Is it easier when you are all in the same office? Maybe or maybe not.
Fragmented systems make it harder!

- Portfolio management in Excel
  - "CEO"
  - Area mgr
  - Dept mgr
  - Unit mgr
- PULS = KPI/Scorecard system
- Reporting
- Decisions
- Budget, forecast, actuals
  - Budgeting system
- Project list with actuals
  - ERP System
- Projects
- Planning and risk management – ex. Excel, WBS Chart Pro, MS Project, Primavera, Projectplace, PPI, PLS, Exonaut
- Collaboration and document management, – SharePoint, various EDM systems

NKG

RKG
Does your organization plan strategically?

“Management System - realizing the strategy”

“Management System – the structured way to drive improvements and change”

"In our experience, breakdowns in a company's management system, not managers' lack of ability or effort, are what cause a company's underperformance. By management system, we're referring to the integrated set of processes and tools that a company uses to develop its strategy, translate it into operational actions, and monitor and improve the effectiveness of both."

Robert S. Kaplan and David P. Norton
Harvard Business Review
Project Maturity Model*

1. Ad Hoc Level
   - No PM process

2. Planned Level
   - Individual project planning

3. Managed Level
   - Systematic project planning & control

4. Integrated Level
   - Integrated planning & control of projects

5. Executed Level
   - Ongoing improvements to the PM process

* Berkeley Project Management Process Maturity Model
Where is your organization?

* Berkeley Project Management Process Maturity Model
Does information = control?

Does having a dashboard mean you can manage dispersed project teams?
Top 7 Key Strategies

1) Select a communication strategy on day 1
2) Develop processes and procedures
3) Test it out if you’ve never done it before
4) Hold kick-off and team building events
5) Everyone agrees to roles and responsibilities
6) Implement a unified project planning system
7) Provide visibility and maintain control
Fast Fact!

57% of projects fail due to “breakdown in communications.”

Source: http://www.it-cortex.com/Stat_Failure_Cause.htm
#1: Communication strategy

1) Don’t hold a kick-off meeting until you have this established
2) When will meetings be held
3) Who needs to know what
4) What reports do we need and how often
5) Keep it simple to start and allow for flexibility and your system to mature
Project Portal and Collaboration
Fast Fact!

68% of high performing organizations have mature PM processes and practices.

Source: http://www.pmi.org
#2: Develop team processes

1) Build and/or publish SOPs that will be discussed at project kick-off

2) Make sure they are clear, simple, and concise

3) Account for all major project processes:
   - Project Planning
   - Project Reporting
   - Project Changes
   - Project Risks
   - Project Closeout
Document Management

Process Modeling
Workflow Automation
#3: Test out your strategy

1) Don’t roll out a communication strategy unless its proven
2) Don’t publish processes that haven’t been used before
3) Setup a pilot project, highly recommended
4) If problems occur the project strategy will lose credibility
5) Hard to recover
Fast Fact!

73% of high performing organizations utilize extensive training on PM tools and techniques.

Source: http://www.pmi.org
#4: Perfect Kick-off Meetings

1) Bring everyone together initially, worth the investment
2) Allow everyone to talk and build relationships
3) Organize some fun activities
4) Roll out communication strategy, processes, and technology plan
Project Planning
Fast Fact!

39% of projects fail due to lack of planning, resources, ad activities.

Source: http://www.it-cortex.com/Stat_Failure_Cause.htm
Step 5: Roles and Responsibilities

1) Let everyone contribute and ask questions
2) Get signatures and buy-in
3) Publish documents to the project portal
4) Once these are complete then start planning all of the resources
Project Team Management
Fast Fact!

Businesses identified “capturing time/costs against projects” as their biggest project management challenge.

Source: The Access Group
#6: Build a Unified System

1) Make effective use of technology to support your strategy
   - Allows for global planning and tracking
   - Allows for online communication and collaboration
   - Provides integrated reports and metrics
   - Provides resource management tools and capabilities
   - Allows for documentation management, storage and accessibility
Project Portfolio Management

Resource Management
Using a unified "cloud based" solution....

CANEA Framework
Fast Fact!

33% of projects fail because of a lack of involvement from senior management.

Source: University of Ottawa Study
#7: Provide Visibility

1) Current schedule
2) Milestones
3) Metrics
4) Costs
5) Resource utilization
6) Integrated Reports (Whole Project Team)

Without visibility you don’t have control!
Performance Management

Business Intelligence
Organizational Dashboards
Recap: Key Strategies

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CANEA Short Facts

- A Scandinavian fast growing company
- We offer a COTS Management System Software: CANEA Framework empowering business operations
- CANEA has been developing the CANEA Framework Software in 15 years
- Currently 100 000+ users globally
- Customers in all industry verticals
- Internationally established reseller network in over 20 countries
- We are a Microsoft Gold Partner & PMI REP
Our solution: Management System Software

The integrated management system software CANEA Framework allows organizations to plan, execute, follow up and improve business operations in just one solution.

- Lifecycle management of information
- Workflow engine to drive business processes
- Model, share and improve business processes
- Execute projects and manage portfolios
- Define strategy & manage KPI’s and performance
World leading producer of iron ore

“We needed a solution to manage our $1 billion project portfolio. The evaluation of tools gave an unambiguous answer. Almost all members of the huge evaluation team had favored CANEA!”

LKAB started out 1899 is owned by the Swedish government and is operating the world’s largest and most modern underground iron ore mine. Annual investment project portfolio worth Euro 1 bn.
Global Subway Operator with award winning QMS

“We are using the CANEA platform as a foundaion for our integrated management system including documents, processes, workflows and projects!”
Trusted by Industry Leading Organizations