OPINION / An integrated approach to achieving team goals

How integrating other management processes with Project Management can enhance team effectiveness

Elisabeth Goodman and John Riddell

March 2010

Achieving team goals faster, better, with reduced cost and minimal risk is the "holy grail" that has been sought through the development of different management disciplines. Of these a structured and rigorous Project Management approach is recognised as the most efficient way to achieve a team's desired outcome. However it can become complex as it employs a wide range of tools and techniques, especially when practiced at a "high level". But what of its application to a wide range of business objectives in small to medium sized teams? And what of the other management disciplines which often compete for attention or which are favoured by individuals or experts? Could the best elements of these be integrated with the key principles of Project Management to form an approach wide in appeal, yet simple in application?

This article seeks to draw out the opportunities for combining techniques from Change Management (e.g. identifying and communicating the approach to change), Knowledge Management (i.e. to create, capture, organise, access and use knowledge) and Process Improvement (e.g. Lean and Six Sigma) in a more integrated way, to enrich projects at all stages of their lifecycle. It is based on an approach that the authors have developed: "Achieving team goals – an integrated framework."[1]

Practitioners of various combinations of these four approaches (if we include Project Management as one of them) have written about some of the opportunities to integrate them. Examples are:

- G Michael Campbell and Sunny Baker in "The Complete Idiot's Guide to Project Management"[2] demonstrate how Change Management should be interwoven with Project Management. For example, working with stakeholders when defining the scope of the project and getting their input during the planning phase. They introduce process improvement tools that a project team could use to ensure quality in a project, and also lessons learnt approaches.
- Chris Collison and Geoff Parcell in "Learning to Fly"[3] include "learn before, during and after" in their model as steps to achieving business results, and address barriers to change so that the environment for knowledge sharing can be created.

- Stephen R Covey et al in "Predictable Results in Unpredictable Times"[4]. They stress the importance of establishing goals and measures at the start of a team's work. Teams (operational or project) should be able to regularly review how they are doing against these measures, and share knowledge and lessons learnt to continuously improve their performance and so achieve their goals more effectively.
- Steven Spear in "Chasing the Rabbit"[5]. All four of the key steps identified for achieving "high-velocity" organisations involve Process Improvement and continuous learning through Knowledge Management. The steps Steven Spear describes are ones that would apply to both operational and project teams.

The following table gives an overview of how the three approaches might integrate with and enrich the stages of Project Management.

Project Management	***Concept***		***Definition***	***Implementation***	***Handover and Closeout***
Change Management	Sponsor engagement	Stakeholder analysis	Develop change management plans	Manage targets and change agents	Implement re-enforcing strategy
Knowledge Management	Learn before (e.g. Peer Assists)		Copy/adapt from similar projects	Learn during	Learn After (e.g. After Action Review)
Process Improvement Techniques	Define		Measure & Analyse	Improve	Control

In some areas the other disciplines re-enforce or enhance facets of project management; in other areas they provide a complementary benefit – as the following illustrates:

Concept:
Knowledge Management techniques ensure that the team learns from its own and others' previous experience.
Process Improvement techniques enable the team to establish a firm factual basis for its goals, and ensure that the detailed analysis needed to define how it is going to achieve its goals is carried out.

Definition:
The development of a Change Management plan, which generally addresses cultural change, should consider how to effectively use change champions to diffuse behavioural change through the organisation, as well as the more typically used communication approaches.
Knowledge Management puts copying or adapting from previous teams' experiences high on the agenda in order to shortcut the waste of re-invention.
Process Improvement techniques will drive strategic decisions based on data and analysis of the root cause of problems.

Implementation:

Implementation requires a "steady hand on the tiller". The 'climate' (or general situation) of stakeholders (including change 'targets') and the influence of concurrent initiatives should be continually assessed to determine how effectively the change is being adopted and embedded.
The team's knowledge base will need to be managed, issues and opportunities addressed in a timely manner and important new learnings surfaced and shared more widely as appropriate.

Handover and Closeout:
A re-enforcing strategy will ensure that the change does not "slip" as the team withdraws and attention moves elsewhere. Effective measures, combined with visual reporting, will aid managers and those directly involved to monitor progress, and to identify opportunities for continuous improvement.
This is also the time to review what the team has learnt, and to ensure that those learnings are captured and shared in such a way that new project teams or established operational teams will be able to benefit from them.

The following case studies are illustrations, from our own practical experience, of how these management disciplines can enrich the delivery of projects:

Case Study 1: Using customer surveys to shape team strategies

- A global support team needed a better understanding of its customers' requirements in order to ensure that it was using its resources effectively to meet its priorities.
- A project was defined and carried out which involved the design and execution of a customer survey, collation of the results, and a workshop with all team members to analyse the findings and develop forward plans.
- Process Improvement techniques were used to design the survey (Voice of the Customer), and to carry out root cause analysis on the survey findings and develop solutions during the workshop.
- This work enabled the team to shape their 2-3 year global strategy with key areas of priority identified for work streams to take forward.

Case study 2: Reducing research cycle time

- A research group wanted to find ways to significantly reduce the cycle-time involved in identifying potential new development candidates.
- Although the focus was on using Lean and Six Sigma approaches to do this, project management techniques were used to structure and co-ordinate the work involved in running workshops with 11 project teams, training senior and middle management and participants in the techniques involved, and in reviewing recommendations with management. In addition, as the workshops were run consecutively, each one was able to benefit from the learnings (approach and findings) of the previous workshops.
- It was anticipated that the final recommendations would result in a 20% decrease in cycle time.

Case Study 3: Improving the robustness of the technical transfer of manufacturing processes

- A global manufacturing organisation encountered post start-up problems with some products after internal transfer of manufacture.
- Root cause analysis identified issues related to technical evaluation and knowledge transfer.
- A pilot was carried out centring on the creation of a knowledge map using process improvement data collection methods
- Knowledge transfer techniques were used to uncover tacit knowledge of the process.
- The approach was very successful at surfacing and improving process understanding thus providing for effective manufacture at the new location, and was adopted as an integral element of project transfer projects.

Case study 4: Setting up new operational frame-works in response to internal audits

- An internal company audit identified 24 critical findings for a high-risk area that needed to be addressed on a global basis.
- An audit response programme team was set up consisting of 8 cross-organisation work-streams. The work-streams used process mapping tools to identify the 'as is' and the 'to be' approaches for addressing the audit findings.
- Project and Change Management techniques were used to manage the implementation of the new operational framework.
- An operational team is now in place to manage this work on an on-going basis including: a governance structure, a corporate policy and SOP, IT systems, auditing and monitoring processes, training and intranet based support materials.

References:

1."Achieving team goals – an integrated framework." http://www.cambridgenetwork.co.uk/news/article/default.aspx?objid=66716

2."The complete idiot's guide to Project Management", by G Michael Campbell and Sunny Baker, Alpha Books, 2000

3. *"Learning to Fly", by Chris Collison and Geoff Parcell. Capstone Publishing Ltd, 2nd edition 2004*

4. "Predictable results in unpredictable times", by Stephen R. Covey, Bob Whitman and Breck England. FranklinCovey Publishing, 2009.

5. "Chasing the Rabbit. How market leaders outdistance the competition and how great companies can catch up and win", by Steven Spear. McGraw Hill 2009.

About the authors:

***Elisabeth Goodman** is the owner and Principal Consultant of RiverRhee Consulting. She has 25 years' experience in Pharmaceutical R&D, where she has held management roles in Information and Library Management, and internal training and consultancy roles supporting business teams on a global basis. Elisabeth is an experienced and certified practitioner in change management and Lean Six Sigma, and an expert in knowledge management, with a proven track record in improving team performance and leading business change projects.*

***John Riddell** MAPM is an Associate with RiverRhee Consulting. He has held technical, operational and project management roles in pharmaceutical manufacturing working with both small and large teams from a local to a global basis. He is a certified practitioner in Lean Six Sigma, is highly experienced in knowledge management. He has developed a successful programme to coach leaders in developing teams that have multiple cultures and are spread across global locations.*