

# Hard Conversations: Project Quality & Sponsorship

Payson Hall

payson@catalysisgroup.com

## Abstract

Managing the expectations of executive sponsors with regard to product quality is essential from the start, but often overlooked until the end of a project when expectations have hardened. This presentation describes the need to have early and ongoing conversations about product quality and schedule performance with executive sponsors, and provides examples and techniques for the discussions.

## Biography

*Payson Hall has experience building, managing, and reviewing large software development and systems integration projects. Formally trained as a computer scientist, Payson has worked on commercial software development and custom systems integration projects during his 35 years in data systems development. He has been engaged as a consultant by a variety of public and private sector projects throughout North America and Europe to assist them with project definition, planning, risk assessment, project reviews, and rehabilitation. In addition to his active consulting activities, Payson has authored a number of articles on project management and technical topics, written a book on project sponsorship, developed and taught seminars in practical project management, and been a featured speaker on project management topics at numerous professional conferences.*

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# 1 Introduction

Negotiations about product quality usually occur at the worst possible time – when a project is late, over budget, executive tempers are short, and the team is exhausted. These conversations are usually painful for all involved and the ugly-but-necessary trade-offs agreed to frequently provoke the recrimination, “If we’d had this conversation months ago, we wouldn’t be in this dismal situation now.”

In the real world, cost/time/quality trade-offs are a fact of life. On many projects, though – discussing quality trade-offs is the “third rail” of project management – a subject avoided whenever possible.

Delaying a discussion of project quality until the situation is dire is a disservice to everyone involved in the project: the sponsors, the product consumers, and the development team.

The goal of this paper/presentation is to offer constructive ways to engage project sponsors and teams in early conversations about project quality and sustain those conversations throughout product development to minimize surprise and disappointment in a project’s final days.

## 2 Defining “Quality”

The luminaries of quality have developed surprisingly diverse definitions of the term over the past 80 years.

- Ishikawa & Deming – “Quality and customer satisfaction are the same thing.”
- Juran – “Quality is meeting or exceeding customer expectations.”
- Crosby – “Quality is conformance to requirements.”
- Weinberg – “Quality is value to some person.”

My favorites are Crosby – because if I can get agreements about requirements then I have a clear target, and Weinberg because it reminds me that humans are involved and that there is uncertainty.

Crosby famously said, “If a Cadillac conforms to all the requirements of a Cadillac, then it is a quality car. If a Pinto conforms to all the requirements of a pinto, then it is a quality car.”

Weinberg famously cautioned, “This assumes the requirements are correct.”

If requirements correctly capture what is important to the wrong people, that is a failure.

If requirements incorrectly or incompletely capture what is important to the right people, that is a failure.

For the purposes of this conversation, I’m going to define “project quality” as “conformance to requirements, where conformance represents value to some person (including the project’s sponsors).”

My reframing is not intended to be arrogant (these luminaries are all smarter than I am), but to put a heavy project focus on the definition of quality for purposes of our discussion. Recall that all of the luminaries above (except Weinberg) were talking about product and process quality in a manufacturing sense.

## 3 The Holy Trinity of Project Management

A “Project” is a temporary effort undertaken to accomplish a defined objective within specified limits of schedule and resources - this broad definition encompasses a variety of business undertakings. Key words in this definition are:

- Temporary - a project must have a beginning and an end
- Defined objective - there must be an outcome that can be evaluated at some point in the future as “successful” or “unsuccessful”
- Schedule limits – there is a desired or required time target for completion of the project
- Resource limits - there are identified constraints on what an organization is willing and able to invest to achieve the desired outcome

Ideas for projects come from a variety of sources. When projects are proposed, an organization must decide whether it fits among the projects the organization chooses to pursue with its limited resources. This involves judgments based on the anticipated return on investment, the risk of failure, the risk or penalty of not doing the project, the size of the investment required, and the duration of the project. The initial decision to pursue a project is usually based upon preliminary assumptions of project cost, time to complete, and the resulting value of a successful project.

Projects are traditionally defined in three dimensions:

- Scope – What the project will produce to what quality standards, and constraints on how it will be produced
- Schedule – When the project will occur
- Resources – What people, equipment, facilities, materials, and finances will be invested to perform project work.

Some project management texts quibble and attempt to add quality as a fourth dimension, but this is needlessly complex. Project scope and project quality are inseparable concepts – how can we talk about what a project creates without specifying applicable quality standards?

Projects are defined in terms of scope, schedule, and resources. They are planned in terms of scope, schedule, and resources. Project tracking and status reporting should address scope, schedule, and resources. Scope... and QUALITY are an integral part of project management.

## 4 Sponsorship Defined

Projects are started with the best of intentions to solve a business problem, implement a change or develop a new product or service. The initial business case may be sound, but it is based upon limited information. The project starts with the assumption that it is doable, can be achieved within a prescribed or reasonable time frame, and that the results will be worth the investment and worth the risk. Most organizations have a selection process that tries to assure that projects look “reasonable” or worth the risk before they are begun. After a quick sanity check, and perhaps prioritization among the other projects in the current portfolio, they assign a project manager and team, give them marching orders, and wait for the vision to become reality.

When a candidate idea is advanced from “project proposal” (*“Here’s an interesting idea...”*) to “approved project proposal” (*“Let’s spend time and money exploring this...”*), it means that one or more leaders within the organization believe the project is a worthwhile investment. The individuals who decide to invest organizational resources in a project are called the project’s “sponsors”. Sponsors play a critical project role. Sponsors represent the organizational needs that initiated the project and communicate those needs to the project manager and the team. Sponsors are the organization’s voice when answering the question “How will we know this project has been successful?”

Sponsors choose to sponsor a project because of two fundamental assumptions they hold about the effort:

1. The project can be completed successfully within specified schedule, scope and resource bounds
2. The value of the successful project is worth the investment and the risk of failure

Sponsors are expected to be organizational champions for the project as long as the project goals remain aligned with the goals of the business. Sponsors control resources within the organization and have the ability to commit those resources to the project's goal. Sponsors should have the authority to cancel or redefine projects that are subsequently revealed to be poor investments.

Sponsors are the ultimate arbiters of project scope, and therefore the quality of the work products that the project will create.

## 5 Initiating Conversations: Project Definition

One of the most important meetings in the life of a project should happen at the project's inception. I call it the "Cheeseburger Talk."

Anyone who has engaged in marketing that involved schmoozy clients lunches knows the business lunch rule: Never order messy food. No ribs, no spaghetti, no drippy cheeseburgers. The reason? It's difficult to maintain an aura of dignity and propriety when you have ketchup on your chin. The cheeseburger talk is specifically designed to break this rule and capitalize on the consequences.

An important discussion must occur at the start of a project between the project's sponsor and project manager. To be effective, this discussion needs to be relaxed and candid. Getting the sponsor away from the workplace, away from the trappings of his or her office (the credenza, secretary, and that BIG desk) to engage in one-on-one dialog is essential. If the executive gets sauce on his or her hands or face, you get extra credit.

The relationship between the project manager and the sponsor is unique. The sponsor has a business problem to solve and controls the priorities and resources of the organization. The project manager's job is to work with the sponsor to define a project that addresses the business problem and then look for a credible way to perform the project within the sponsor's schedule and resource targets. The project manager is there to support the sponsor's decision making as well as to define, plan and manage the project. To do this well the project manager must understand the sponsor's goals. The best way to discover what someone wants is to ask.

Some questions that must be asked may be perceived as insubordinate or challenging of the sponsor's authority or wisdom... so they shouldn't be asked in a public forum, by e-mail, or in an environment that encourages the sponsor to wear their "boss" hat. The intention of the cheeseburger and the cheeseburger talk is to help the project manager get to the heart of the sponsor's motivation and to lay a foundation for defining and running the project. I strongly recommend approaching these questions the first time in a casual setting.

### Scope

- What do you want?
- Why is our organization interested in doing this?
- What would a successful project produce?
- How will we know we are done and successful?
- What is the successful project worth to our organization?

### Resources

- What resources are you willing to commit to the project (people, equipment, materials, facilities, \$\$\$)?
- How did you come to believe that these resources were sufficient for the project?

### Schedule

- When do you want it?
- Why then?
- What is the business impact of delivery a day or a week or a month later than your target?
- What would early delivery be worth?

### History

- How did we come to be here?
- Why haven't we done this sooner?
- Has this project (or anything like it) been attempted before? What happened?

### Relationships

- As the project progresses, what status information would you like to receive?
- How often do you want to receive regular status?
- How shall I contact you if I have questions or issues with the project?
- Who is authorized to change the schedule, scope and resource bounds of the project once we have agreed to a written project definition?
- If at any time, I develop concerns about the project's viability, when do you want to know?

The last question is key. You will always get the same answer, "I would want to know right away.", but the question underscores the relationship between the project manager and the sponsor. The project manager is the sponsor's eye and ears. If new information suggests the project goals are in trouble, it is the project manager's obligation to notify the sponsor promptly. This question reminds both parties of that duty.

These questions make a great agenda for lunch. They can be covered in casual conversation to provide the project context and history as well as the schedule, scope and resource boundaries. They may look simple, but it is surprising how many project managers cannot answer these "simple" questions for projects that have been underway for months.

The cheeseburger talk sets a tone for the project. It establishes a foundation for the project manager prior to project definition and it reinforces the sponsor/project manager relationship. A perfect ice-breaker, this conversation helps establish the project manager/sponsor relationship at the start of the project, or any time there is a personnel change in the project manager or sponsor role.

This provides a foundation for later discussions about project quality.

## **6 Initiating Conversations: Project Priorities**

A sign on a print shop wall read:

People want their projects *good, fast, and cheap.*

We say, "Pick two."

A lot of wisdom in twelve words. Getting priority information on your projects can be challenging, but the idea is similar. We must understand sponsor priorities among schedule, scope, and resources.

As a project proceeds, there are always adjustments and tradeoffs from a project's original goals to better match changing realities both on the project and in its sponsoring organization. The tradeoffs may be subtle, but there are ALWAYS tradeoffs. If you choose to work a weekend to make a delivery date, you have increased resources to defend schedule. If you choose to defer a function from release 1 to release 2, you have deferred scope to preserve schedule. Elect to slip a schedule two weeks to allow time to correct defects before you ship, you are allocating additional time and resource to preserve scope (quality).

Trade offs are a natural. Becoming good at identifying tradeoffs is a good career skill. Being able to explore and understand your sponsor’s priorities so that you offer the right tradeoffs is essential.

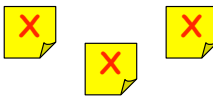
On my projects, I use a tool called an RSS Matrix to discuss priorities with a sponsor (see figure). I try to discuss priorities early in the project as the initial scope, schedule, and resource goals emerge. The rules of the matrix are simple,

1. One “X” per row,
2. One “X” per column, and
3. The sponsor must choose.

## Charter: RSS Matrix (Priorities)

**Rules**

1. One “X” Per Row
2. One “X” Per Column
3. Sponsor must choose

		Flexibility		
		Least	Some	Most
				
<b>Resources</b> (\$ and People)				
<b>Schedule</b> (Time)				
<b>Scope</b> (Quality, Quantity & Constraints)				

I build an empty matrix and put “X” post-its in the “least flexible” column for all three variables (an illegal matrix) to begin. Then I walk a sponsor through the sorting, asking a series of hypothetical questions that make pair-wise comparisons of scope and schedule, schedule and resources, resources and scope.

Although it takes a bit of practice, the result is worth it. Some suggestions as you start:

- Assure the sponsor that they are not committing to ANYTHING in advance. This tool only helps identify potential tradeoffs consistent with the sponsor’s priorities. He or she will have a chance to approve any specific tradeoffs before they are made via your change management process (or some similar consultation).
- Be patient with new sponsors – some will think you are looking for wiggle room. You are trying to understand their priorities to better support their business decisions.
- Don’t try to read the sponsor’s mind – This is a vital discussion to have with the sponsor explicitly. Don’t make an inference based upon the business case or corporate culture. You will usually learn something about the project as part of the discussion. Make the sponsor choose.
- This is a crude tool – actual priorities may vary over time. This general guideline is helpful to support your problem solving. If the reaction you get to specific proposals consistently digresses from the RSS Matrix guide, you might want to check with the sponsor to see if priorities have changed.

- No ties – There are ALWAYS priorities. If the project were going to be a day late or a dollar over budget, which would the sponsor choose if making a choice was unavoidable?

The RSS Matrix accomplishes three important things:

1. It reminds the sponsor that tradeoffs might be necessary
2. It captures their thinking at a specific moment in time
3. It serves as a guide for problem solving and a starting point for negotiation

## 7 Planning and Negotiating for Quality

Once the project is well defined and the sponsor's priorities among schedule, scope and resources have been established, the project manager has information to support planning and negotiating for project quality.

If the schedule is particularly aggressive or resources are constrained, effective planning will involve seeking sponsor concurrence on prioritizing and potentially deferring scope or negotiating quality standards early in the project.

Practical considerations include:

- Is there a particular requirement straining the project that could be eliminated or negotiated to a later phase?
- How might scope be reduced without compromising project objectives?
- Can quantity be negotiated?
- Can throughput/performance be negotiated?
- Helpful changes to rules/constraints/assumptions?
- Are quality standards appropriate? Are they negotiable?

These conversations are difficult, but much easier to have at the beginning of a project if a good relationship has been established with the project sponsor and priorities are clear. They have the added advantage of helping to keep the team oriented to the sponsor's goals from the beginning of the project.

## 8 As the Project Unfolds

If project scope, schedule, and resource consumption is being consistently and effectively tracked against project plans and expectations this can be the basis for an ongoing conversation (often called "status reporting") to the project sponsors to alert them of surprises encountered along the way.

Early detection of schedule, resource, or scope pressure facilitates revisiting project boundaries and discussions of project scope when small course corrections might be sufficient to accomplish project goals – again by looking for tradeoffs among schedule, resources, and scope/quality.

## 9 Summary

Discussions of project quality are painful if they are deferred until late in project implementation. Although the conversations can be challenging, establishing rapport with project sponsors and getting information about their desires and priorities facilitates early and thoughtful conversations about project scope and quality tradeoffs when they are necessary.