

CSIT214/CSIT883
IT Project Management



Communication and Stakeholder management

Project management framework (review)

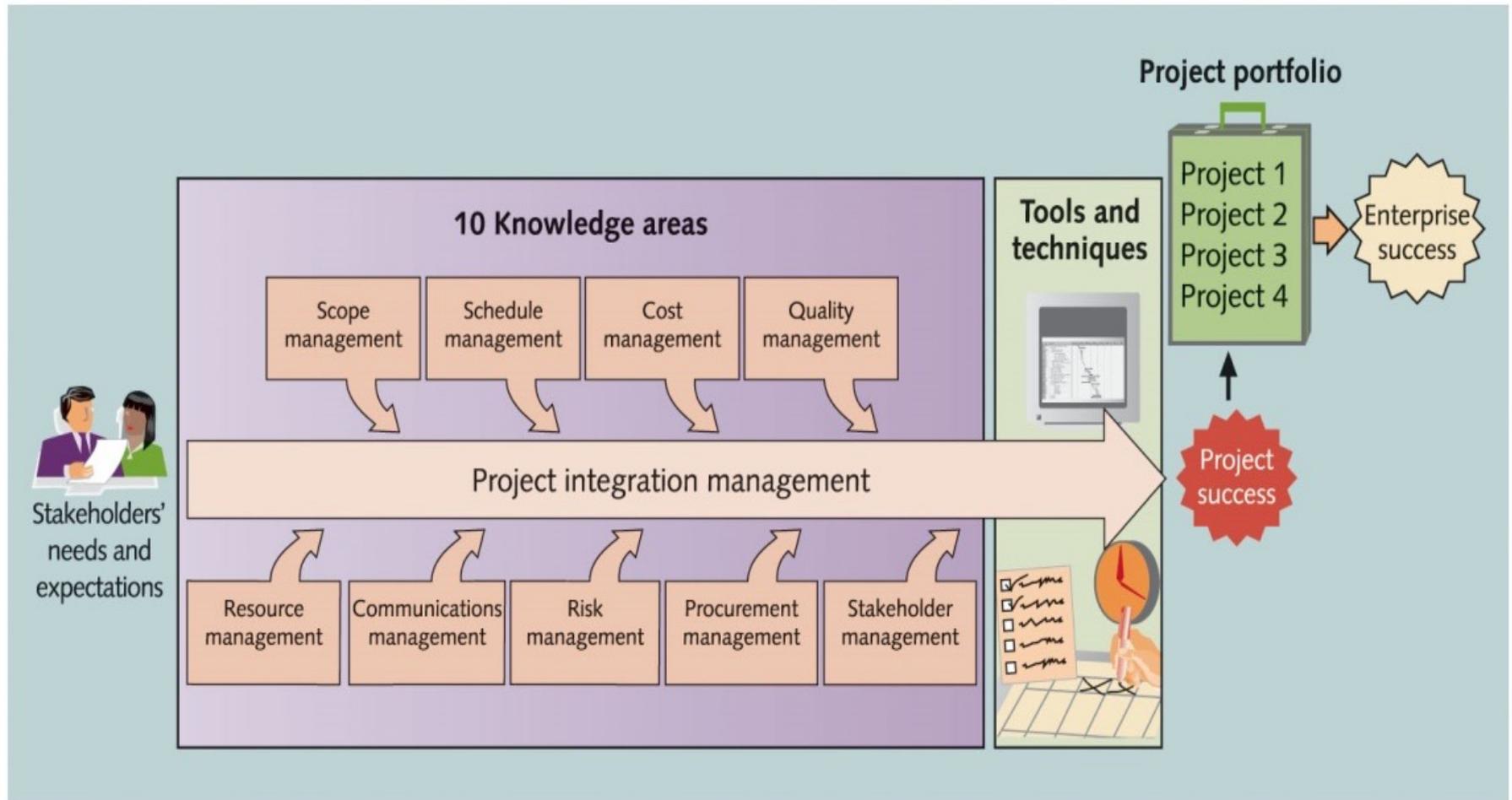


FIGURE 1-2 Project management framework

Importance of Good Communications

- The greatest threat to many projects is a failure to communicate
- Our culture does not portray IT professionals as being good communicators
- Research shows that IT professionals must be able to communicate effectively to succeed in their positions
- Strong verbal and non-technical skills are a key factor in career advancement for IT professionals

2014 Study on Importance of Non-technical Skills

- ❑ Most important non-technical skills include problem solving, teamwork, and listening
- ❑ Some organizations will hire individuals with minimal technical skills so long as they demonstrate solid soft and business skills

Project Communications

Management Processes

-
- **Planning communications management:** Determining the information and communications needs of the stakeholders
 - **Managing communications:** Creating, distributing, storing, retrieving, and disposing of project communications based on the communications management plan
 - **Controlling communications:** Monitoring and controlling project communications to ensure that stakeholder communication needs are met

Project Communications Management Summary

Planning

Process: **Plan communications management**

Outputs: Communications management plan, project documents updates

Executing

Process: **Manage communications**

Outputs: Project communications, project documents updates, project management plan updates, and organizational process assets updates

Monitoring and Controlling

Process: **Control communications**

Outputs: Work performance information, change requests, project documents updates, and organizational process assets updates

Project Start

Project Finish

Keys to Good Communications

- ❑ Project managers say they spend as much as 90 percent of their time communicating
- ❑ Need to focus on group and individual communication needs
- ❑ Use formal and informal methods for communicating
- ❑ Distribute important information in an effective and timely manner
- ❑ Set the stage for communicating bad news
- ❑ Determine the number of communication channels

Understanding Group and Individual Communication Needs

- ❑ People are not interchangeable parts
- ❑ As illustrated in Brooks' book *The Mythical Man-Month*, you cannot assume that a task originally scheduled to take two months of one person's time can be done in one month by two people

Personal Preferences Affect Communication Needs

- ❑ Introverts like more private communications, while extroverts like to discuss things in public
- ❑ Intuitive people like to understand the big picture, while sensing people need step-by-step details
- ❑ Thinkers want to know the logic behind decisions, while feeling people want to know how something affects them personally
- ❑ Judging people are driven to meet deadlines while perceiving people need more help in developing and following plans

Importance of Face-to-Face Communication

- Research says that in a face-to-face interaction:
 - 58 percent of communication is through body language.
 - 35 percent of communication is through how the words are said
 - 7 percent of communication is through the content or words that are spoken
- Pay attention to more than just the actual words someone is saying
- A person's tone of voice and body language say a lot about how he or she really feels

Encouraging More Face-to-Face Interactions

- Short, frequent meetings are often very effective in IT projects
- Stand-up meetings force people to focus on what they really need to communicate
- Some companies have policies preventing the use of e-mail between certain hours or even entire days of the week

Distributing Information in an Effective and Timely Manner

- Don't bury crucial information
- Don't be afraid to report bad information
- Oral communication via meetings and informal talks helps bring important information—good and bad—out into the open

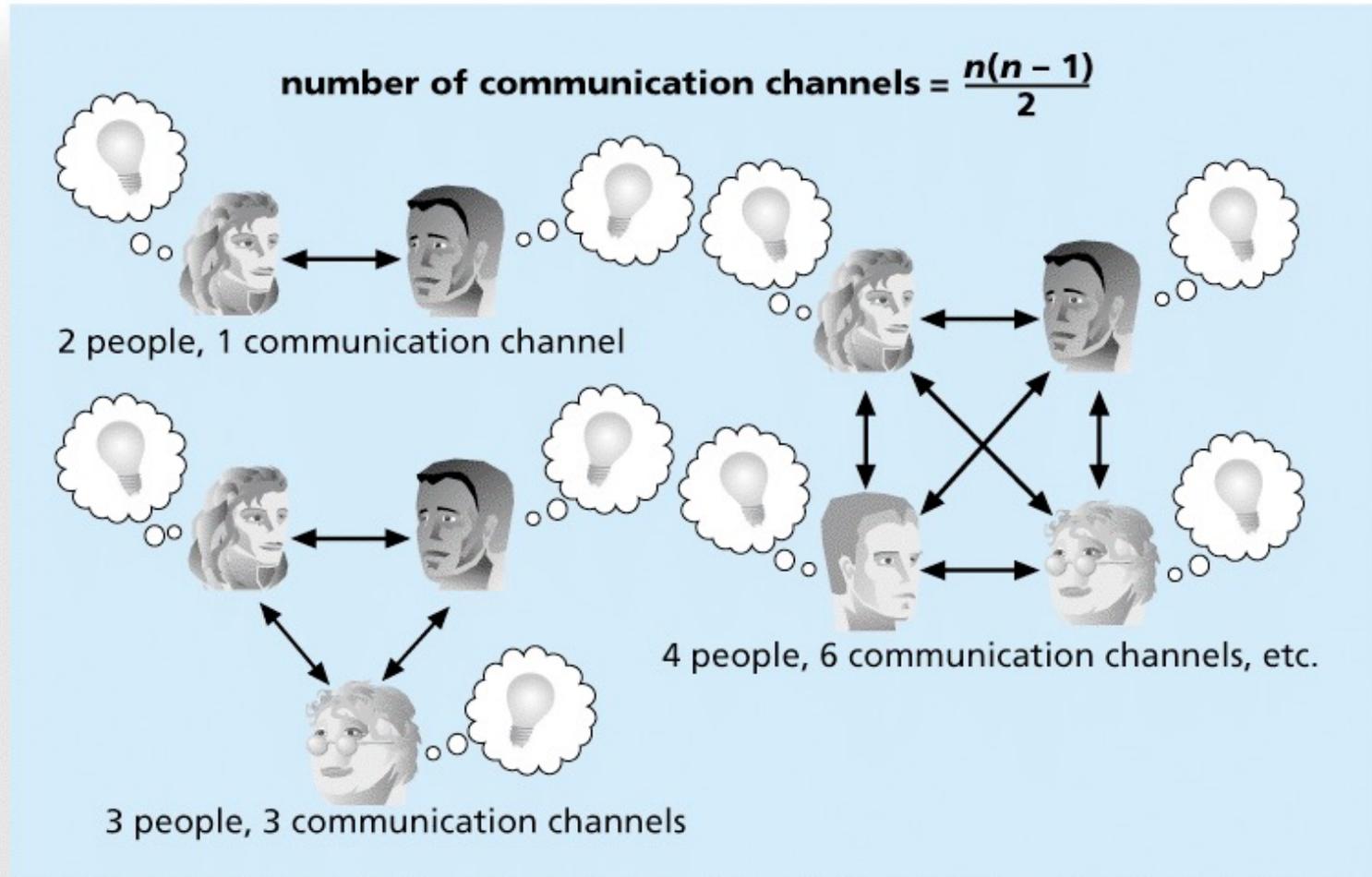
Other Communication Considerations

- ❑ Rarely does the receiver interpret a message exactly as the sender intended
- ❑ Geographic location and cultural background affect the complexity of project communications
 - Different working hours
 - Language barriers
 - Different cultural norms

Determining the Number of Communications Channels

- ❑ As the number of people involved increases, the complexity of communications increases because there are more communications channels or pathways through which people can communicate.
- ❑ Number of communications channels = $\frac{n(n-1)}{2}$
where n is the number of people involved

The Impact of the Number of People on Communications Channels



Planning Communications Management

- Every project should include some type of **communications management** plan, a document that guides project communications
- ▣ The communications management plan varies with the needs of the project, but some type of written plan should always be prepared
- ▣ For small projects, the communications management plan can be part of the team contract
- ▣ For large projects, it should be a separate document

Communications Management

Plan Contents

1. Stakeholder communications requirements
2. Information to be communicated, including format, content, and level of detail
3. Who will receive the information and who will produce it
4. Suggested methods or technologies for conveying the information
5. Frequency of communication
6. Escalation procedures for resolving issues
7. Revision procedures for updating the communications management plan
8. A glossary of common terminology

Sample Stakeholder Analysis for Project Communications

Stakeholders	Document Name	Document Format	Contact Person	Due
Customer management	Monthly status report	Hard copy and meeting	Tina Erndt, Tom Silva	First of month
Customer business staff	Monthly status report	Hard copy	Julie Grant, Sergey Cristobal	First of month
Customer technical staff	Monthly status report	E-mail	Li Chau, Nancy Michaels	First of month
Internal management	Monthly status report	Hard copy and meeting	Bob Thomson	First of month
Internal business and technical staff	Monthly status report	Intranet	Angie Liu	First of month
Training subcontractor	Training plan	Hard copy	Jonathan Kraus	November 1
Software subcontractor	Software implementation plan	E-mail	Najwa Gates	June 1

Comments: Put the titles and dates of documents in e-mail headings and have recipients acknowledge receipt.

Managing Communications

- ❑ Managing communications is a large part of a project manager's job
- ❑ Getting project information to the right people at the right time and in a useful format is just as important as developing the information in the first place
- ❑ Important considerations include the use of technology, the appropriate methods and media to use, and performance reporting

Using Technology to Enhance Creation and Distribution

- ❑ Technology can facilitate the process of creating and distributing information, when used properly
- ❑ It is important to select the appropriate communication method and media

Classifications for Communication Methods

- ❑ *Interactive communication*: Two or more people interact to exchange information via meetings, phone calls, or video conferencing. Most effective way to ensure common understanding
- ❑ *Push communication*: Information is sent or pushed to recipients without their request via reports, e-mails, faxes, voice mails, and other means. Ensures that the information is distributed, but does not ensure that it was received or understood
- ❑ *Pull communication*: Information is sent to recipients at their request via Web sites, bulletin boards, e-learning, knowledge repositories like blogs, and other means

Media Choice Table

	KEY: 1 = EXCELLENT		2 = ADEQUATE		3 = INAPPROPRIATE	
HOW WELL MEDIUM IS SUITED TO:	HARD COPY	TELEPHONE CALL	VOICE MAIL	E-MAIL	MEETING	WEB SITE
Assessing commitment	3	2	3	3	1	3
Building consensus	3	2	3	3	1	3
Mediating a conflict	3	2	3	3	1	3
Resolving a misunderstanding	3	1	3	3	2	3
Addressing negative behavior	3	2	3	2	1	3
Expressing support/appreciation	1	2	2	1	2	3
Encouraging creative thinking	2	3	3	1	3	3
Making an ironic statement	3	2	2	3	1	3
Conveying a reference document	1	3	3	3	3	1
Reinforcing one's authority	1	2	3	3	1	2
Providing a permanent record	1	3	3	1	3	1
Maintaining confidentiality	2	1	2	3	1	3
Conveying simple information	3	2	1	1	2	3
Asking an informational question	3	2	1	1	3	3
Making a simple request	3	3	1	1	3	3
Giving complex instructions	3	3	3	2	1	2
Addressing many people	2	3	3 or 1*	2	3	1

Galati, Tess. Email Composition and Communication (EmC2) Practical Communications, Inc. (www.pracom.com) (2001).

*Depends on system functionality

Reporting Performance

Performance reporting keeps stakeholders informed about how resources are being used to achieve project objectives

- **Status reports** describe where the project stands at a specific point in time
- **Progress reports** describe what the project team has accomplished during a certain period of time
- **Forecasts** predict future project status and progress based on past information and trends

Controlling Communications

- ❑ The main goal of controlling communications is to ensure the optimal flow of information throughout the entire project life cycle
- ❑ The project manager and project team should use their various reporting systems, expert judgment, and meetings to assess how well communications are working. If problems exist, the project manager and team need to take action, which often requires changes to the earlier processes of planning and managing project communications
- ❑ It is often beneficial to have a facilitator from outside the project team assess how well communications are working

Suggestions for Improving Project Communications

- ❑ Develop better communication skills
- ❑ Run effective meetings
- ❑ Use e-mail and other technologies effectively
- ❑ Use templates for project communications

Developing Better Communication Skills

- ❑ Most companies spend a lot of money on technical training for their employees, even when employees might benefit more from communications training
- ❑ Individual employees are also more likely to enroll voluntarily in classes to learn the latest technology than in classes that develop soft skills
- ❑ As organizations become more global, they realize they must invest in ways to improve communication with people from different countries and cultures
- ❑ It takes leadership to improve communication

Running Effective Meetings

- ❑ Determine if a meeting can be avoided
- ❑ Define the purpose and intended outcome of the meeting
- ❑ Determine who should attend the meeting
- ❑ Provide an agenda to participants before the meeting
- ❑ Prepare handouts and visual aids, and make logistical arrangements ahead of time
- ❑ Run the meeting professionally
- ❑ Set the ground rules for the meeting
- ❑ Build relationships

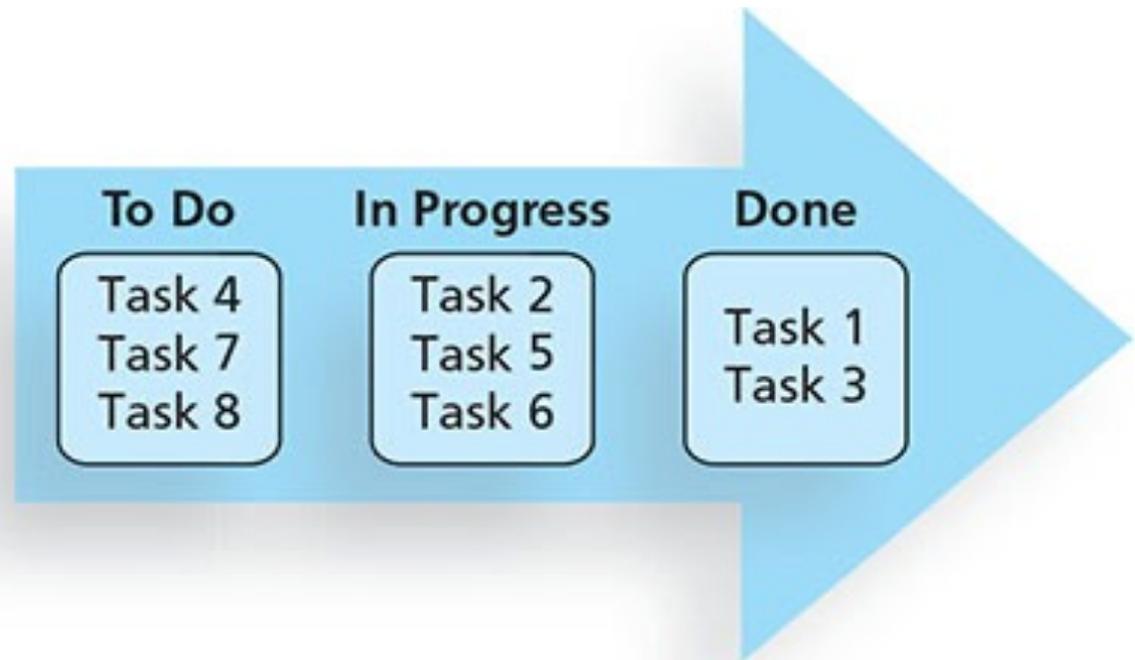
Using E-Mail, Instant Messaging, Texting, and Collaborative Tools Effectively

- ❑ Make sure that e-mail, instant messaging, texting, or collaborative tools are an appropriate medium for what you want to communicate
- ❑ Be sure to send information to the right people
- ❑ Use meaningful subject lines and limit the content of emails to one main subject, and be as clear and concise as possible
- ❑ Be sure to authorize the right people to share and edit your collaborative documents

Sample Collaborative Tools

- ❑ A **SharePoint portal** allows users to create custom Web sites to access documents and applications stored on shared devices
- ❑ **Google Docs** allow users to create, share, and edit documents, spreadsheets, and presentations online
- ❑ A **wiki** is a Web site designed to enable anyone who accesses it to contribute or modify Web page content
- ❑ Kanban boards visually show tasks that need to be done, are in progress, or are completed

Sample Kanban Board



Source: Kathy Schwalbe, *An Introduction to Project Management*, Fifth Edition (2015)

Guidelines - email

- ❑ Send email to the right people
- ❑ Use meaningful subject lines
- ❑ Limit the content of the email to one main subject
- ❑ The body of the email should be as clear as possible
- ❑ Always read your email before you send it
- ❑ Limit the number and size of attachments
- ❑ Delete email that you do not need to save
- ❑ Never open attachment if you do not trust the source
- ❑ Respond to email quickly
- ❑ File each message appropriately

Using Templates for Project Communications

- ❑ Many technical people are afraid to ask for help
- ❑ Providing examples and templates for project communications saves time and money
- ❑ Organizations can develop their own templates, use some provided by outside organizations, or use samples from textbooks
- ❑ Recall that research shows that companies that excel in project management make effective use of templates

Sample Template for a Project Description

Project X Descripton

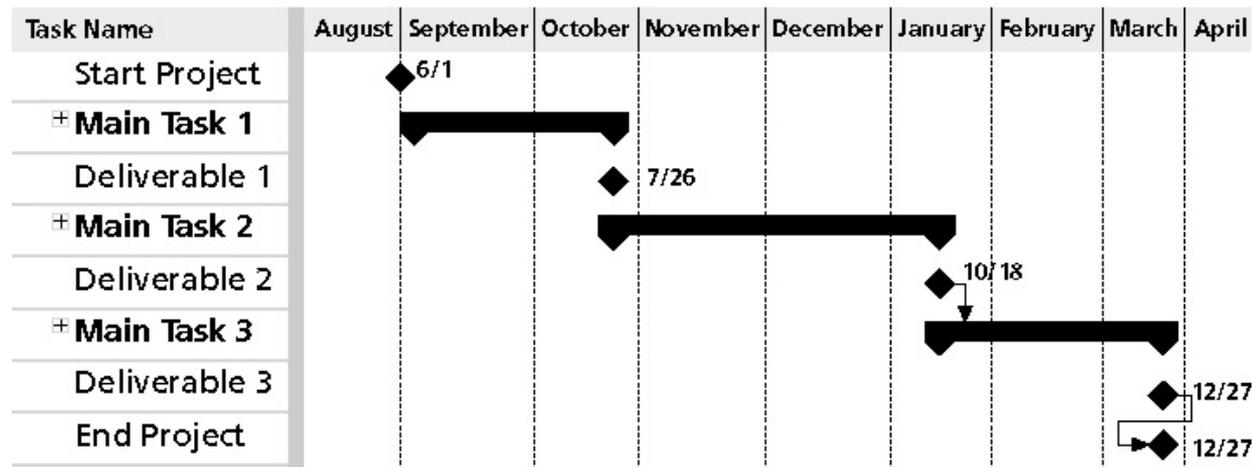
Objective: Describe the objective of the project in one or two sentences. Focus on the business benefits of doing the project.

Scope: Briefly describe the scope of the project. What business functions are involved, and what are the main products the project will produce?

Assumptions: Summarize the most critical assumptions for the project.

Cost: Provide the total estimated cost of the project. If desired, list the total cost each year.

Schedule: Provide summary information from the project's Gantt chart, as shown. Focus on summary tasks and milestones.



Sample Template for a Monthly Progress Report

I. Accomplishments for Month of January (or appropriate month):

- Describe most important accomplishments. Relate to project's Gantt chart.
- Describe other important accomplishments, one bullet for each. If any issues were resolved from the previous month, list them as accomplishments.

II. Plans for February (or following month):

- Describe most important items to be accomplished in the next month. Again, relate to the project's Gantt chart.
- Describe other important items to accomplish, one bullet for each.

III. Issues: Briefly list important issues that surfaced or are still important. Managers hate surprises and want to help the project succeed, so be sure to list issues.

IV. Project Changes (Date and Description): List any approved or requested changes to the project. Include the date of the change and a brief description.

Final Project

Documentation Items

- I.** Project description

- II.** Project proposal and backup data (request for proposal, statement of work, proposal correspondence, and so on)

- III.** Original and revised contract information and client acceptance documents

- IV.** Original and revised project plans and schedules (WBS, Gantt charts and network diagrams, cost estimates, communications management plan, etc.)

- V.** Design documents

- VI.** Final project report

- VII.** Deliverables, as appropriate

- VIII.** Audit reports

- IX.** Lessons-learned reports

- X.** Copies of all status reports, meeting minutes, change notices, and other written and electronic communications

Lessons Learned Reports

- The project manager and project team members should each prepare a **lessons-learned report**
 - A reflective statement that documents important things an individual learned from working on the project
- The project manager often combines information from all of the lessons-learned reports into a project summary report
- See template and ³⁷sample in Chapter 3

Project Archives

- It is also important to organize and prepare project archives
- **Project archives** are a complete set of organized project records that provide an accurate history of the project
- These archives can provide valuable information for future projects as well

Project Web Sites

- ❑ Many project teams create a project Web site to store important product documents and other information
- ❑ Can create the site using various types of software, such as enterprise project management software
- ❑ Several project management tools can be used on multiple devices

Using Software to Assist in Project Communications

- ❑ There are many software tools to aid in project communications
- ❑ Today many people telecommute or work remotely at least part-time
- ❑ Project management software includes new capabilities to enhance virtual communications
- ❑ While technology can aid in the communications process, it is not the most important. Far more important is improving an organization's ability to communicate, which often involves cultural change



Stakeholder management

Importance of Project Stakeholder Management

- ❑ Because stakeholder management is so important to project success, the Project Management Institute decided to create an entire knowledge area devoted to it in 2013
 - The purpose of project stakeholder management is to identify all people or organizations affected by a project, to analyze stakeholder expectations, and to effectively engage stakeholders
- ❑ Projects often cause changes in organizations, and some people may lose their jobs when a project is completed
 - Project managers might be viewed as enemies
 - By contrast, they could be viewed as allies if they lead a project that helps increase profits, produce new jobs, or increase pay for certain stakeholders
- ❑ In any case, project managers must learn to identify, understand, and work with a variety of stakeholders

What is Project Stakeholder Management?

- Project stakeholder management processes

- **Identifying stakeholders:** identifying everyone involved in the project or affected by it, and determining the best ways to manage relationships with them

- **Planning stakeholder management:** determining strategies to effectively engage stakeholders

- **Managing stakeholder engagement:** communicating and working with project stakeholders to satisfy their needs and expectations, resolving issues, and fostering engagement in project decisions and activities

- **Monitoring stakeholder engagement:** monitoring stakeholder relationships and adjusting plans and strategies for engaging stakeholders as needed.

Identifying Stakeholders

- Stakeholders can be internal to the organization or external.
 - Internal project stakeholders generally include the project sponsor, project team, support staff, and internal customers for the project
 - Other internal stakeholders include top management, other functional managers, and other project managers because organizations have limited resources
 - External project stakeholders include the project's customers (if they are external to the organization), competitors, suppliers, and other external groups that are potentially involved in the project or affected by it, such as government officials and concerned citizens

Identifying Stakeholders

- A stakeholder register includes basic information on stakeholders
 - Identification information: stakeholders' names, positions, locations, roles in the project, and contact information
 - Assessment information: stakeholders' major requirements and expectations, potential influences, and phases of the project in which stakeholders have the most interest
 - Stakeholder classification: is the stakeholder internal or external to the organization? Is the stakeholder a supporter of the project or resistant to it?

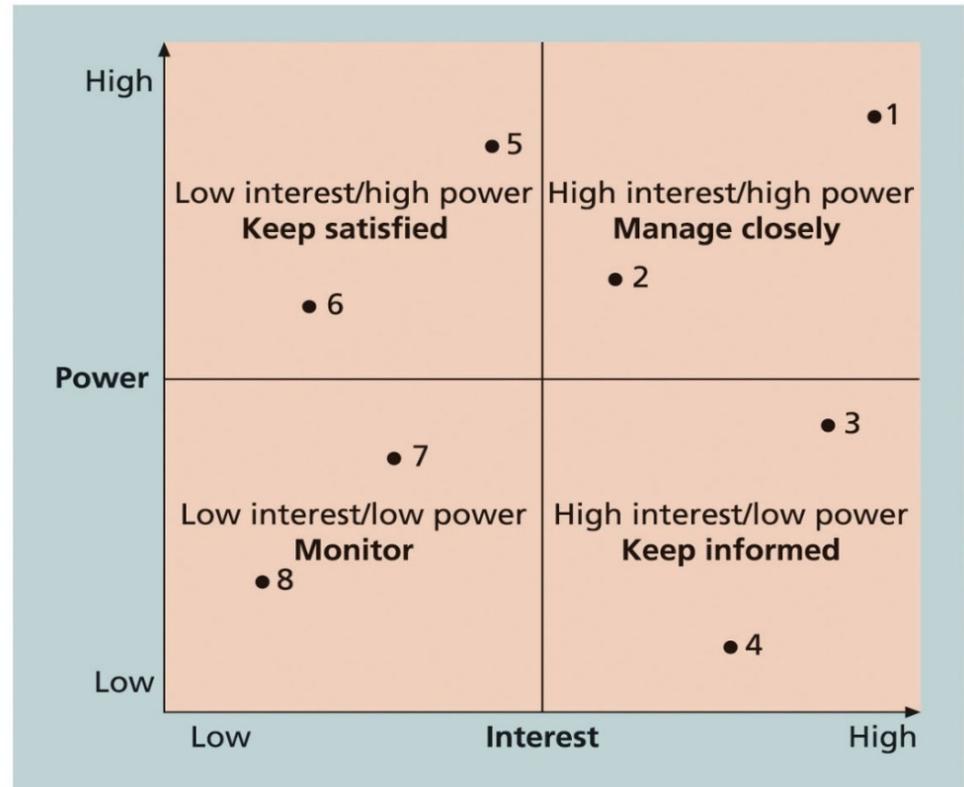
Identifying Stakeholders

Name	Position	Internal/ External	Project Role	Contact Information
Stephen	VP of Operations	Internal	Project sponsor	stephen@globaloil.com
Betsy	CFO	Internal	Senior manager, approves funds	betsy@globaloil.com
Chien	CIO	Internal	Senior manager, PM's boss	chien@globaloil.com
Ryan	IT analyst	Internal	Team member	ryan@globaloil.com
Lori	Director, Accounting	Internal	Senior manager	lori@globaloil.com
Sanjay	Director, Refineries	Internal	Senior manager of largest refinery	sanjay@globaloil.com
Debra	Consultant	External	Project manager	debra@gmail.com
Suppliers	Suppliers	External	Supply software	suppliers@gmail.com

Identifying Stakeholders

After identifying key project stakeholders, you can use different classification models to determine an approach for managing stakeholder relationships

- A power/interest grid can be used to group stakeholders based on their level of authority (power) and their level of concern (interest) for project outcomes



Source: Kathy Schwalbe, *An Introduction to Project Management*, Fourth Edition (2012)

FIGURE 13-2 Power/interest grid

Identifying Stakeholders

Stakeholder engagement levels

- Unaware: unaware of the project and its potential impacts on them
- Resistant: aware of the project yet resistant to change
- Neutral: aware of the project yet neither supportive nor resistant
- Supportive: aware of the project and supportive of change
- Leading: aware of the project and its potential impacts and actively engaged in helping it succeed

Planning Stakeholder Management

- ❑ After identifying and analyzing stakeholders, project teams should develop a plan for management them
 - May be formal or informal, based on the needs of the project
- ❑ The stakeholder management plan can include:
 - Current and desired engagement levels
 - Interrelationships between stakeholders
 - Communication requirements
 - Potential management strategies for each stakeholders
 - Methods for updating the stakeholder management plan

Planning Stakeholder Management

- ❑ Because a stakeholder management plan often includes sensitive information, it should not be part of the official project documents, which are normally available for all stakeholders to review
 - In many cases, only project managers and a few other team members should prepare the stakeholder management plan
 - Parts of the stakeholder management plan are not written down, and if they are, distribution is strictly limited

Managing Stakeholder Engagement

- ❑ Project sponsors often rank scope, time, and cost goals in order of importance and provide guidelines on how to balance the triple constraint
- ❑ This ranking can be shown in an expectations management matrix to help clarify expectations
- ❑ Understanding the stakeholders' expectations can help in managing issues
 - Issues should be documented in an issue log, a tool used to document, monitor, and track issues that need resolution
 - Unresolved issues can be a major source of conflict and result in stakeholder expectations not being met
 - Issue logs can address other knowledge areas as well

Managing Stakeholder Engagement

Measure of Success	Priority	Expectations	Guidelines
Scope	1	The scope statement clearly defines mandatory requirements and optional requirements.	Focus on meeting mandatory requirements before considering optional ones. In this case, following corporate IT standards is optional.
Time	1	There is little give in the project completion date. The schedule is very realistic.	The project sponsor must be alerted if any issues might affect meeting schedule goals.
Cost	3	This project is crucial to the organization. If you can clearly justify the need for more funds, they can be made available.	There are strict rules for project expenditures and escalation procedures. Cost is very important, but it takes a back seat to meeting schedule and then scope goals.
Technology/ standards	2	There are several potential solutions available, but only one that meets all of the sponsor's technical requirements, especially for accounting.	While corporate IT standards are important, an exception makes sense in this case.

Managing Stakeholder Engagement

Issue #	Description	Impact	Date Reported	Reported By	Assigned to	Priority (H/M/L)	Due Date	Status	Comments
1	Need requirements categorized as mandatory and optional	Cannot do much without it	Feb. 4	Ryan	Stephen	H	Feb. 8	Closed	Requirements clearly labeled
2	Need shorter list of potential suppliers —no more than 10	Will delay evaluation without it	Feb. 6	Debra	Ryan	H	Feb. 12	Open	Almost finished; needed requirements categorized first
Etc.									

Monitoring Stakeholder Engagement

- ❑ You cannot control stakeholders, but you can control their level of engagement
 - Engagement involves a dialogue in which people seek understanding and solutions to issues of mutual concern