

Why Consider Advanced Strategies Project Definition Course?

Advanced Strategies has observed a growing need in the marketplace for project teams and their stakeholders to communicate effectively their needs, perspectives, and business intentions regarding various projects that they undertake. Because our clients, and perhaps many others, have repeatedly identified this as an issue, we would like to address the issue of Project Definition, both formally, via training and hands-on consulting, and informally, via conversations and the written word.

The Advanced Strategist interviewed Patrick McHugh and Tia Crawford, both project managers with NCR, and Frank Ruggiero, a seasoned project manager with experience in a variety of industries, to discover something of their insight and experiences in the area of Project Definition and why they feel it is useful in their positions. All of them have taken Advanced Strategies' 3-day Project Definition course and share with us here how their new understanding of Project Definition has made a difference in their daily work. We hope that their experiences will inspire others to use Project Definition techniques to strengthen their project management efforts.

"What, exactly, is Project Definition?" you ask. It is a means to define the purpose and boundaries of a given effort in terms of expected business results, to determine what constitutes a meaningful and effective solution, and to establish measurements of success. It also improves communication between and coordination of all stakeholders while minimizing the risks caused by a poorly planned and executed project. Patrick adds, "Project Definition is simple but is often neglected. It is an elegant process to identify where the project is going at the beginning."

Project Definition focuses on meeting business intentions and objectives, rather than just on the solutions. It can be simple or complex: it can be done on a napkin at lunch or in a 30-page document. "It may be time-consuming to write it," says Patrick, "but it is far less time-consuming than re-working a project when we don't understand the scope up front. More detail surfaces when you start asking questions, and really understanding the scope of the project at the beginning avoids excessive rework, missed issues, gaps, etc. Recently I did one that involved a two-hour conference call with all 7-8 stakeholders, four hours to write it up, then another two-hour conference call to resolve issues, further clarify any questions, and get everyone's agreement. I'd say this is at or less than average for most projects."

He goes on to say that his clients need something to enable them to meet objectives. Project Definition does this, as it focuses on what the client company's need is and why individuals want to do whatever it is, before everyone gets stuck in "how" it is to be done. "For the client, if we don't meet their need, regardless of *how* the project is done, then we've failed."

And from Frank's perspective, "Project Definition...provides the appropriate foundation for any project to begin with a manageable set of tasks that will result in a fully agreed-upon outcome and set of deliverables. This is the road to success in any project undertaking. It sounds simple, but we don't always have a map good enough to assure that we follow that road."

Defining a project well at the outset minimizes multiple causes of project failure: resistant users, insufficient solid business support, lost sponsorship, ill-defined scope, scope creep, and lack of understanding by the project manager of the users' needs. Patrick says, "Project Definition adds focus and organization to what you're doing. If not done, the consequences become very clear. If we fail to ask the client what they really want, we will miss some huge things, and in some cases, we will have addressed only one small piece of their overall need. It also helps to prevent scope creep: we have to define what we should and should not be doing, i.e., what is *in* and *out* of scope."

When asked what were the most valuable things she learned in the class, Tia says, "I learned that the Project Definition is (shaped) from the business perspective, not a technology perspective. It does not



focus on the “how” or the “what,” but on the “why.” It also describes where a team can look for the solution to the need. I learned how to interview and develop information about a business client’s intentions (business results they are seeking) when they are asking for a solution. Understanding a client’s values will help in guiding decisions as the project proceeds. I found the information gained about the context of the solution to be more robust and more valuable in understanding scope than the previous techniques I have used.”

How does a project manager begin to develop a Project Definition? “I use interviews with stakeholders to understand the information that defines a project,” says Tia. “I have found that most people are very open and agreeable to discussing their project when you approach it from the perspective of really wanting to understand their need, their intentions and their values. Once I explain the process, I have found most people to be very candid with their responses. I have developed an extremely valuable Project Definition after meeting with only one client for one hour. Obviously, meeting with more than one stakeholder only improves the Project Definition, but valuable insights can be gained in a very short period of time. Each Project Definition effort that I have worked on has been a positive experience for the clients, the team, and me. Project Definition is a valuable relationship building tool between the project team and the business client. I found the Project Definition approach to be superior to the techniques I have used in the past (Project Charter, Project Initiation).”

Patrick agrees. “Once they realize that the intent of Project Definition is clear identification of the objectives, scope, assumptions, etc., everyone agrees that Project Definition is important and they’re more cooperative. The whole process requires good facilitation, clear communication, and critical thinking. When they realize the importance of agreement, they’re ‘in’ and the process flies.”

Should Project Definition be done with stakeholders as well as project sponsors? “Absolutely,” says Tia. “If you do not understand the key stakeholders’ perspectives, values, and intentions, you cannot manage their expectations and be sure that everyone who is needed to make the project a success is on board. What is worse is that you could end up solving the wrong problem or end up with a solution that adds little business value.”

And Patrick concurs: “Without the stakeholders, we would have a shortsighted and deficient Project Definition. Often our sponsors are within the Information Technology organization. ‘Stakeholders’ includes a lot of other people. If they are not a part of the team, or if the Information Technology (IT) group assumes it knows what the users want, then IT is likely to get to testing and find the project is not what users wanted. The stakeholders will question everything, requiring IT to re-visit everything they’ve done. Then the project goes into a re-work phase involving much additional time and expense to resolve the issues.”

Of course, project management and project definition are not without surprises. Patrick tells us, “I have often seen the mistaken perception that everyone knows everything about the project. In reality, each stakeholder has a different set of assumptions about what the project will deliver, and although they are not necessarily contradictory, they can be. Each group knows a little, but none usually knows it all. They may have different objectives that the other stakeholders don’t know about. My job is to facilitate understanding and joint effort. I am often surprised at their buy-in after they understand the value of Project Definition.”

“Project Definition can also be used as a tool to get sales people excited. Sales people are motivated by sales. If we understand what the customer wants up front, we won’t waste our time, the sales cycle will be shorter, and the project will get started on the right foot,” says Patrick.

Of course, we at Advanced Strategies believe that our training in this area is superior—naturally, right? But we needed to know what our students thought, so we asked them to tell us candidly what differences they had observed in Advanced Strategies’ approach to Project Definition vs. the “traditional” approach. Tia told us, “In the traditional approach that I have used, the focus was on objectives, scope, critical success factors, and assumptions. I would describe this approach as shallow compared to the Advanced Strategies approach to Project Definition because I never considered the traditional approach as a



relationship building tool the way I do the Advanced Strategies approach to Project Definition. You learn so much about the client and how they want to frame the solution. I cannot see how there can be any misunderstandings as a project starts and moves forward after having approached a project with the Advanced Strategies (method of) Project Definition.

And Patrick said, "I have had project management training in the past, but before this course, I never had formal training on scope definition (i.e., what's in or out of scope.) You still need to understand what the customer wants. Advanced Strategies' Project Definition course answers more questions about scope definition, assumptions, risks, and the like. Project Definition is a simple way to bring it all together. It is the first step, and it should be done right away, up front. It is solution-independent and customer-independent and is just a statement of the customer's need. It should be a non-offensive, non-threatening way to understand what the customer wants and needs. And it adds clarity for the customer."

When we asked Tia, Patrick, and Frank what advice they would give to other project managers, they had this to say: "Go to the training and use it," Tia tells them; "Be persistent in selling the concept to your organization and project teams." Frank says, "An accurate definition of the project based on sound fundamentals will eliminate many common misunderstandings." And Patrick agrees: "Don't underestimate the importance or the value of Project Definition."