



A Virtual Global Team in Trouble: A Case Study – Part I

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A virtual global project team was having significant difficulty in getting a major project completed. The project was a strategic one for the organization and would affect all offices worldwide. There appeared to be quite a bit of dissension among the team members on a regular basis and the project manager seemed unable to handle the situation. Additionally, the following were regular occurrences:

- Team members consistently missed virtual team meetings – they just didn't show up
- Team members went off on their own – not following protocols or processes, unconcerned with timelines or if another team member relied on them to get things done
- Deadlines were missed regularly and the project was in danger of going significantly over budget
- Team members were trying to get off the project and moved on to other projects
- The project manager was frustrated and frequently complained to the project sponsor that the other team members were not competent and the project would not be successful if they remained on the project
- Similarly, the team members complained to others in the organization about the project manager and the lack of direction on the project

One issue they didn't have – working effectively with others of different backgrounds. Since the organization works virtually regularly and have locations globally, along with working with global clients, employees regularly attend cultural and diversity/inclusion programs. Cultural issues were definitely not an issue with the team. Issues seemed more based on a lack of understanding how each other works and how they could work together as a team and certainly there was limited understanding of the strategic importance of the program.

Project and Team Background

Project team members are geographically disbursed, with members in the United States (both on the east and west coasts), and overseas in Europe and Asia. There are 7 team members as follows:

- Amy, Project Manager, based in Europe with 10 years project management experience, on "keep lights on" types of projects and also on infrastructure projects.
- Samantha, Project Team member, based in the US-East Coast with 5 years experience working on project teams as a project leader and project team member. Samantha's expertise is in information technology – specifically application development.
- Yujian, Project Team member, based in Asia with 7 years experience both as a project manager and as a member of project teams. Yujian's expertise is in project scheduling and budgeting.
- Jackson, Project Team Member, based in the US-West Coast with 8 years project management experience, mainly on technical projects.



- Annabelle, Project Team member, based in Asia with 5 years experience working on project teams as the team administrator.
- Aafreen, Project Team member, based in Europe with 3 years experience working on project teams. Aafreen's expertise is as a business analyst with a strong information technology background.
- Issa, Project Team member, based in the US-West Coast with 20 years experience working on project teams in a variety of roles, including project manager, project lead, and as a project team member. He is a strong problem solver and has often been brought in to solve particularly difficult project-related problems.

Of all of the team members, only 3 of them have worked together in the past – Annabelle, Yujian and Aafreen. They have been on one other project together which was successful. At the time they were all in the same location working on the project.

The project is to implement a knowledge management database company-wide for a global IT services organization. As the organization continued to grow internationally, it was important to have a central location for all documentation and for business intelligence data to ensure accurate information available to all offices simultaneously. There was a budget of \$2.3 million set aside for this project, with an expectation of initial deployment within 1 year to a select number of sites and business units as a pilot. Another significant portion of money was set aside for enhancement and refinement based on the initial launch of the database, with complete functionality and roll out within a year and a half after the pilot rollout. The Project Sponsor is Alexander, Vice President of Operations, based in the US-East Coast. One of the team's main responsibilities was to do a complete analysis of needs for the knowledge management database. They were provided a list of stakeholders (15 individuals in total) which included managers of each of the business units globally.

The project started over 6 months ago and, according to the Project Sponsor, to date there has been limited progress made.

A Project in Trouble

At the 3 month mark, when the Project Sponsor, Alexander, checked in with the Project Manager, Amy, he was told that they were still trying to get the stakeholders to determine what functionality they wanted in a knowledge management database. Amy said that some of the stakeholders still hadn't scheduled time to meet with the team and other stakeholders were not sure what they wanted in the way of functionality. Given that, the project team was working to determine the functionality on their own, without the stakeholders' involvement. Alexander was concerned and suggested to Amy that she really needed to get the stakeholders involved – they needed this database to run their businesses effectively and needed to drive the functionality of it. He asked Amy to put a plan in place on how to work with the stakeholders and get what was needed to move forward with the project. Two weeks later, Amy was still having difficulty figuring out how to get the stakeholders to discuss the requirements



of the knowledge management database. She mentioned the team was not really helping her out and she was uncomfortable working on such a major project. Alexander got the team together, along with the stakeholders, and arranged a meeting to discuss the functionality necessary for the database.

One month after the requirements were gathered (4 ½ months from the official project start date), limited progress was made on building the database. Additionally, many of the stakeholders were adding additional functionality requirements. At the 6 month mark, the final design of the knowledge management database was still incomplete and it appeared the team was unable to come to agreement on what the final design should be, and there was still no final decision on the database functionality. The stakeholders felt that their requirements were still not captured effectively and they were incomplete and they were doubtful about the success of the project.

What Went Wrong

There were many theories among the team as to what went wrong with the project.

The Project Sponsor's Comments

Alexander, the sponsor, felt that the team likely did not get enough direction from him on the project. He acknowledges he should have been more closely involved with the project, assisting the project manager in getting the stakeholders together and moving the project forward – especially since this was a strategic initiative for the company. Additionally, he felt he did not have the right team in place. However, these were the only individuals available to work on this project at this time and it needed to move forward quickly. In hindsight, he probably should have waited until the appropriate resources were available. He also felt the project manager, Amy, likely didn't have the experience necessary to lead such a project, although with experience she would be able to in the future – she definitely had promise. Alexander was also concerned that seven individuals for such a large project was spreading the team too thin and the number of team members should have been closer to 10 – 15.

The Project Manager's Comments

Amy, the project manager, felt that she didn't have the support she needed to really be effective in the role. While she has managed many projects before, this was quite new to her and she was hoping to have more support from the project sponsor. She was initially excited about the opportunity to develop new skills but now was questioning her ability to do the job at all. Additionally, she wasn't comfortable working with this team. In each of her past projects she had worked with the same team from project to project. This is the first time she has been with an entirely different group of people. She feels like she has to hand-hold them through everything and she just doesn't have the time to do that. On past projects she felt that the team was much more receptive to her explaining how the project tasks should



be completed. This team wanted to do things their way and because of that she felt the project was really going off track.

She was unsure how to go about working with the stakeholders to understand what they wanted to see for the project. In past projects she has worked alongside a business analyst who got the requirements for her. She wasn't sure who to ask for help and didn't want the team to know she couldn't handle such a major project.

The Project Team's Comments

The project team felt that Amy had really limited experience as a project manager and probably shouldn't be on a strategic project that had great visibility within the organization. She was not receptive to different ways of accomplishing tasks and, in fact, refused to listen to the team if they felt the project was heading in the wrong direction and wanted to offer suggestions. Additionally, the team wasn't comfortable with each other yet (although they did agree on the above!). They would have liked more time to get to know each other prior to digging into the project as they needed to rely heavily on each other and felt uncomfortable doing so in some situations. Only the 3 individuals who had worked together before were "in sync" and even they were having difficulty on this project due to a lack of leadership and guidance.

The team also felt that they didn't really have a strong grasp of the purpose of this project. They understood it was a large project for the company and have been told numerous times it was part of the strategic plan, but they failed to see how it tied back to the organizational goals. Frankly, the team felt as if they were being set up to fail.

The Stakeholders' Comments

The stakeholders were naturally concerned about the lack of progress. This was an important component of the organization's strategic plan and was a large investment for the organization. While they recognized it was a short timeframe to accomplish so much, significant growth within the organization made it imperative that this project move forward and quickly. The concerns of the stakeholders were as follows:

- Given that there has not been significant progress made to date on the project, it would likely go over budget and the pilot version release delayed.
 - The project manager needed to be replaced as she was unable to move the project forward and didn't seem skilled enough for such a strategic project.
 - It may be necessary to add additional team members to the project and/or replace some of the current team members if they didn't have the right mix of skills.



- The gathering requirements for the knowledge management database would be removed from the project manager and given to a business analyst to manage; however, there was no business analyst currently with time available for this project. Given the lack of current business analyst resources (due to deployment on other projects), either the role would need to be outsourced or timelines on other projects would have to be reset to free up a resource for this project.

The stakeholders needed to move forward quickly with whatever decisions they were going to make on this project to get it back on track.

A meeting was called of all stakeholders along with the CEO and the Chair of the Board to make a decision.

To be continued with Part II: *Now What? Moving the Project Forward.*