



A Virtual Global Team in Trouble: A Case Study – Part II: Now What? Moving the Project Forward

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In Part I we started our story on a virtual team in trouble. In this post, we will cover the stakeholder meeting and the decisions made to move the project forward, along with processes put in place to ensure this situation does not occur in the future.

The Stakeholder Meeting

The stakeholders, including the project sponsor, the CEO, the Chair of the Board of Directors, along with representatives from many of the business units who were vested in getting this project completed, met for 2 hours to determine next steps.

During the meeting, they agreed on the following:

- The project was a major component of the organization's 5 year strategic plan.
- Pulling an entire new team together was not possible as many of the individuals who supported the project management function were assigned to other work.
- It didn't make sense to completely remove the project manager from the project, she brought some valuable experience to the project and it may be disruptive to the team to completely replace her.
- It may make sense to "restart" the project – taking a step back and ensuring the project plan makes sense given what needs to be accomplished.

At the end of the meeting, the project sponsor, Alexander, set up a meeting with the project manager, Amy to discuss the following:

- What support Amy needed to move this project forward and whether she would be willing to work with another project manager with more experience on these projects.
- Recommendations for additional team members – where are the "gaps" in the team.



Amy's Meeting with Alexander

Amy prepared for her meeting with Alexander by making a note of the major issues on the project and her recommendations for resolving them.

Issue	Possible Solution	Resources/Support Needed
Team members were not working well together.	Have a team member “get together” with all team members in the same location to do some team building and training around processes/protocols for this project.	Approval for travel to the US for a team meeting. Support from Alexander and others on the leadership team to discuss the importance of the project – where it fits in the organization strategy, etc.
Project plan - specifically around the scope of the project and timelines.	Re-visit the project plan, clarifying the scope of the project and timelines for completion.	Support from Alexander in helping to work with the stakeholders.
Requirements still needed to be gathered for the project.	Have a business analyst assigned to the team to help with the requirements gathering component.	Support from Alexander in identifying and securing a business analyst to help on the project.

Amy was a bit hesitant to work alongside another project manager because she felt that she would lose control over the project and it would be as if she failed in the task. Additionally, she didn't feel she could face the project team if another project manager had to be brought in to take over the reins of the project. She felt overall that this project was a black mark against her and her capabilities and would have an impact on her future at the company.

During the meeting, Alexander told Amy about the stakeholders meeting and the decisions they had made. He also accepted responsibility for the state of the project, explaining that he should have been more involved and provided her more support. He noted that she is a valuable resource to the organization and was an outstanding project manager. He did believe that this project may have been just too much for her to take on at the moment, a bit over her head given the types of past projects she had worked on.

Since she was a valuable member on the team, he didn't want her to step away from the project entirely, but, given that they needed to expand the team, it may make sense to have a co-project manager in one of the US locations. This would help with coordinating with the team, managing time differences, and also provide her more support as she took on a major project; enabling her to learn working with a project manager experienced in these types of projects.



They worked through the issues Amy identified and decided on the following steps:

Issue	Path to Resolution
Team members were not working well together.	<p>All team members would be brought together for a 2 day “kick off” meeting which would include some team building activities and a presentation by some key stakeholders and the CEO on how the project fits into the organization strategic plan.</p> <p>Since new members would be added to the team, this would be a good opportunity to get everyone together and give a fresh start to the project.</p> <p>It was believed that by bringing everyone together for a face-to-face meeting, they would get to know each other and be more comfortable working together once they were working away from each other.</p>
Project plan - specifically around the scope of the project and timelines.	A new project plan would be developed – starting from scratch – to better define the scope and timeline for the project. The project sponsor noted that he would take an active role in helping to develop the project plan, along with having some other stakeholders involved in the process. Amy would work alongside the other project manager and the team on the development of the project plan. However, prior to the project plan being fully developed, the requirements would be gathered first.
Capturing of requirements for the project.	A business analyst would be assigned to work with the 2 project managers (Amy and the newly assigned one) to get the stakeholders together and begin to gather requirements for the project.

Moving Along...

The following was done toward the re-launch of the project to ensure a successful conclusion:

- A second project manager with 10 years experience in similar projects was assigned to co-lead the project with Amy. His name was Ramesh and he was located in the US – West Coast office.
- A business analyst was pulled from a smaller project and assigned to lead in gathering requirements for this project. Her name was Sarah and she was located in the US – East Coast office. She would take the lead on the gathering requirements portion of the project, working along with Aafreen, who also had business analysis experience. Given his other project responsibilities, he couldn’t lead this effort but would provide support to Sarah and meet face-to-face with stakeholders in Europe. Sarah has 16 years of experience in gathering business



requirements, specifically in difficult situations such as when individuals do not agree on the project, office politics are involved, change management initiatives, etc.

- Two additional team members were added to the project:
 - Sandra, based in Europe, with 8 years experience in application development.
 - Carlson, based in Europe, with 5 years experience working on difficult projects – usually with short timeframes and tight budgets. Additionally, he has expertise in strategic projects.

No current team members were removed from the project; rather, some were re-deployed to focus on other areas of the project given their particular expertise.

The project team now totaled 11, including Sarah – although Sarah would step off the project once requirements were gathered and any additional BA work would be done by Aafreen. Long term the project would include 10 members. The project sponsor would be more involved in the project on a day-to-day basis given its strategic importance to the organization. Four of the stakeholders agreed to also be more involved and to act as problem solvers, including pulling together the other stakeholders as needed to make decisions quickly and resolve issues that occur. These stakeholders would meet with the team at least once a month, unless there was an urgent matter to be addressed which necessitated them meeting with the team more frequently.

The Initial Kick-Off Team Meeting

The initial kick off meeting of all current and new team members, including the project sponsor and the four stakeholders who agreed to be actively involved, was scheduled for on-site in the US – West Coast location. It would be held over a 2 day period. The agenda, at a high level, would include:

- Team building activities - specifically focused on getting the team members acquainted with each other and helping them begin to develop as a team
- A presentation by the CEO and Chair of the Board of Directors about the strategic importance of this project
- Presentations by the project sponsor and other stakeholders
- Developing team norms for how the team members will work together effectively given the various locations involved in the project
- Developing a Roles & Responsibilities Matrix for all team members

The two days would be highly focused and full of activities and sharing of information. The first night, the team would get together for a casual dinner where they could continue to get to know each other and develop a comfort with working together.



The Project Begins...Again

Sarah was able to meet with each stakeholder – either in person or virtually, with the support of Aafreen and was able to gather requirements and come to consensus on what the knowledge database should look like and what should be included in it both for a pilot release and long term. This took about 2 weeks of time given the number of individuals who had input and the importance of the project.

After the requirements were gathered, the project plan was re-developed using the previous project plan as a base. Since Yujian is well versed in project scheduling, including for very complex projects, he was assigned as the primary creator of the project schedule, working with the other team members and stakeholders to develop a comprehensive schedule including contingencies. With the additional resources added to the project, and the support promised by the stakeholders, the project would now take 18 months to complete, but would provide for a more robust pilot version. Additionally, the budget was increased to \$2.8 million dollars from an original budget of \$2.3 million. Better upfront planning and increased efficiencies enabled for a lower increase in the budget than was expected. The stakeholders were pleased with the timeline – it wasn't extending as much as they had thought it would and were certainly pleased with the minimal increase in the project budget monies.

The project sponsor spent significant time working with the co-project managers to ensure they were comfortable working with one another. He was concerned that Amy felt a valuable part of the project and helped them develop a document detailing how they would share responsibilities for the project and where each would take the lead.

The team members worked along quite well – better than expected actually. The 2 day project kick-off made a significant difference in how well they worked together – they were supportive of each other, offered to pitch in if a team member needed help and overall were committed to the project and its success. Certainly, when asked, they noted that the kick off meeting was a great way for them to get acquainted and comfortable with each other and, additionally, the time the CEO and Chair of the Board spent with them really helped them to understand the strategic importance of the project. They felt as if they were part of a great step towards increased success for the organization.

Status reporting, which was not consistent during the first attempt at the project, would be the primary responsibility of Amy and would be sent to all team members and stakeholders every Friday morning by no later than 6:00 AM EST. The following categories were reported on each week in the status report:

- activities planned for this reporting period
- Activities accomplished the reporting period
- Activities planned but not accomplished, reason why and a plan to get those accomplished
- Root cause of variances
- Funds spent to date on the project



- Any overage on budget
- Causes of overage on budget
- Quality variances
- Planned corrective or preventive actions
- Activities planned for the next reporting period
- Costs planned for next reporting period
- New risks identified and the plan to manage those risks
- Other issues
- Additional comments

The Project Moves Along

As the project continued to move along, the team got together – face-to-face – twice more during the project. This was a way to just catch up with each other personally and continue to develop as a team. The team found it quite valuable and it was well worth the investment of bringing individuals together from around the globe. About 6 months into the project, another team member was brought in to the project with a background in business intelligence. His name was Jerry and he was based in the US – East Coast office. He was welcomed into the team and everyone on the team reached out to support him and get him up to speed – virtually initially. One of the face-to-face meetings of the team coincided with Jerry’s arrival on the team, which enabled for him to meet everyone and put a “face to a name” going forward. Jerry was introduced to the project given the need, based on trending with the project, for expertise in business intelligence to ensure the right information was included in the knowledge base and were set up in a manner easily utilized by employees.

Certainly there were hiccups throughout the project, as with any project. But given how well the team supported each other and the initiative, any issues were quickly addressed to the satisfaction of all to keep the project moving along.

What They Learned

The organization learned that it was important to ensure the following is done for all strategic projects:

- Sufficient time is allocated prior to the project start to enable the team to get together – even a virtual team – for a face-to-face session of at least 2 days. This would enable the team members to learn more about each other – how each individual works, their communication style, etc.; which would make it easier to work through issues once they were not in the same physical location.
- Sufficient time must be allowed to ensure the appropriate individuals are part of the project team. Just putting someone on the team because they have availability at that time is not best



for the project, or for the team. However, large projects should be used to help project team members develop new skills and further grow in their roles.

- Planning upfront is key to the success of any project. Additionally, the planning must be done with all stakeholders and all team members involved with planning sessions facilitated by someone well versed in facilitation of meetings.
- For large enough global projects, the potential of 2 project managers co-leading the project should be considered. The project managers should be from different geographic locations.

Additionally, the organization was putting in place a database of all project resources to better track:

- Project technical skill strengths such as cost management, quality management, etc.
- Other skills such as problem solving, facilitation, conflict management, etc.
- Past projects worked on and role on those projects
- Background including education, past employment history
- Resource availability

Summary

The company learned that if they ensure that the right team members are on board and sufficient time is set aside for individuals to get to know each other and develop a level of comfort in working together, the likelihood of project success is increased. For internal projects such as this, even though strategic, it is more important to take the time up front in planning the project with the right resources rather than trying to meet an unrealistic deadline by throwing resources at the project that may not be the correct ones. All of these individuals are good at what they do, by assigning them to the project as they were initially assigned, it is setting them up to fail and the project to fail, creating stressed and frustrated employees who may decide to look elsewhere for a new role.

An important component of any project, regardless of its size or strategic importance in the organization, is to ensure that sufficient time is spent upfront on getting the right resources on the project with the support they need to ensure they are successful.

A February 2010 edition of Talent Management magazine, in an article entitled *The Downside of Virtual Teams*, noted that while working virtually has been made easier due to advancements in technology, communication between virtual team members is still not always easy nor simple and takes work to ensure effectiveness. The article further goes on to state that a survey of more than 600 business professionals found that the majority of common team problems occurred far more frequently within virtual teams than when the teams were in the same physical location.

The article notes that the challenge for virtual teams is learning how to brainstorm effectively and productively, solve problems, and execute on projects when they are not altogether in one location.



Too often virtual teams do not feel comfortable speaking freely, stating their ideas or opinions, leading to poor decision making, decreased morale and lack of productivity.

Ensuring the team gets to know each other – face-to-face when possible for a project kick-off, or at least via a virtual platform, enables for increased comfort in working together virtually on projects. However, this alone will not guarantee all runs smoothly and it is up to the project manager, the project sponsors and organizational leaders to ensure that working virtually is as successful as being together in the same physical location.