



Taking the Initial Steps Toward Understanding The Project Management Function in an Organization (Part 1)

Author: Gina Abudi, MBA, Partner/VP Peak Performance Group, Inc.

When I meet with a client for the first time about how they might improve their project management function, I prefer to spend the first few meetings getting to learn about their organization, how the project management function is structured and perceived, and their long-term goals and objectives.

Let me describe one such meeting.

I was asked by a client “a services company” to help them get their hands around their project management practices so that improvements could be made that would help them meet a long term strategic goal of growing the organization by an additional 100 project management employees worldwide within 2 – 3 years and increasing revenue 50% + within the same time frame via the introduction of new products and services.

After the initial phone call or introductory meeting, I send off a list of questions for the client to answer about the project management function as it currently exists. I use the results of these questions to better prepare for my meeting with the client, and, I have found it really helps the client get a grasp of their project management function. In many cases clients “ask around” the organization to get these answers and/or ping the project managers to get their perspective. For some clients with a lower tolerance of preparing ahead of time, I either scale back on the questions or do more data gathering during the face-to-face meeting. My goal is to ensure that I have a deeper understanding of their project management function and the challenges that they face – and they will also gain a deeper understanding of their project management function.

Initial List of Questions

- How are individuals assigned to project teams?
- What methodology, if any, is followed by the project teams?
- How is the project manager/project lead selected?
- At what point in the project is the project manager brought in? For example,
 - During the initial project planning stages before the project is even decided upon?
 - During the initial project planning stages before the budget and timeline is set, but once the project has been decided upon?
 - After the budget has been set but the timeline is undecided?
 - After the budget and the timeline has been set?
 - Other: _____
- How are deadlines set on the project? For example,
 - Top down?



- By the project sponsor?
 - By the project manager/project team?
 - Other: _____
- How is the project budget set? For example,
 - Top down?
 - By the project sponsor?
 - By the project manager/project team?
 - Other: _____
- How much “push back” is tolerated/allowed by the project manager/project team on the budget, schedule, or other factors? For example,
 - Some, with tradeoffs
 - Only in certain circumstances
 - All the time – we rely on the project team’s expertise
 - Rarely
 - Never
 - Other: _____
- Do your project managers manage global teams?
- Do your project managers manage outside contractors?
- How accurately do your project teams do the following:
 - Make accurate cost estimates
 - Make accurate scheduling estimates
 - Plan for and manage project risks
 - Meet milestones
 - Provide status reports/project tracking
 - Manage multiple resources
 - Capture lessons learned from all projects and apply best practices
 - Develop Work Breakdown Structures
 - Manage changes to the project
- What project software is used within your organization and for what purposes? Does everyone use the software? If not, who does use it (e.g. a particular division or business unit?)
- How do you measure the success of projects?

The Initial Client Meeting

Once I meet with the client, I’m also interested in knowing “how” the projects are completed. For example, does the client rely on a few “heroes” within the project management staff to get things done? (Think of those individuals you know who can swoop in and save a project – they will pitch in and roll up their sleeves regardless of the task.) If they do, I want to learn more about these individuals – their background, number of years with the organization, strengths, behaviors, etc.



Are certain projects finally completed after many fits and starts? Do certain projects seem to be less troublesome than others? Do the project managers rely on functional managers for expertise, or do the project managers also have competency in functional areas such as application development or manufacturing?

I'm interested in understanding the competencies of the project managers themselves. Are they certified? How long have they been practicing project managers? What size projects do they commonly lead? Have they had formal training? How is their performance evaluated? What is the turnover rate of project management staff within the organization? What level of accountability do project managers have on projects?

How does the organization get newly hired project management staff up to speed? Is there a formal mentoring program? Specific training classes? Job-shadowing? What exists to prepare them for their role at the organization?

By gathering this information, I begin to develop a much clearer picture of the project management function within the organization.