



Scope Your Project for Success!

Learn 4 Easy Facilitation Techniques

Presented by: Eleonore F. Pieper
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Sound Familiar?



How the project was sold to the client



How the client described what they wanted



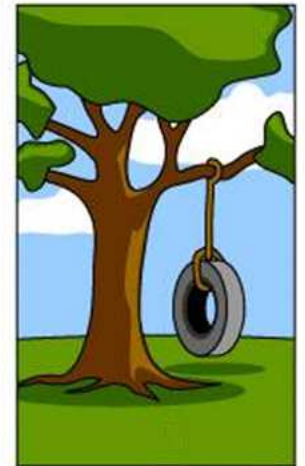
How the PM understood it



How it was designed



How it was implemented



What the client actually needed

What's the Scope of Your Project?

Depends on who you ask...



Avoiding a Tug of War



Scope using a Facilitated Workshop Approach

- “Getting all the liars in the same room”
 - Put all the information on the table
 - Understand and address everyone’s expectations
 - Make collaborative decisions
 - Negotiate commitment
 - Leave with a solid agreement



Benefits

Analysis of projects that used a facilitated workshop approach to stakeholder management found these results:

- Reduction of scope creep risk from 80% to 10%
- Acceleration of project pace during scoping and planning by 30 to 40%
- Reduction of overall project duration and effort by 15%



Capers Jones. *Patterns of Software Systems Failure and Success*. 2000

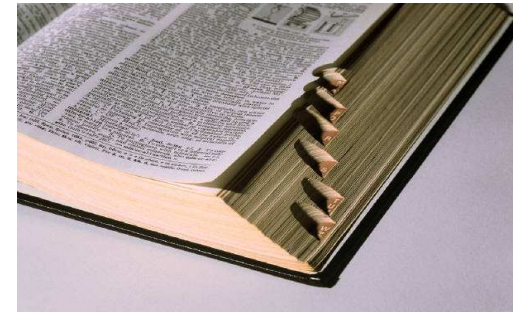
What is Facilitation?

Facilitas (Latin) – ease, readiness, pleasantness

A short answer: *Helping groups do better**

Powerful Stakeholder Management Technique

- Make decisions
- Share information and learn from one another
- Plan work
- Create buy-in and establish consensus
- Solve problems



**The IAF Handbook of Group Facilitation*

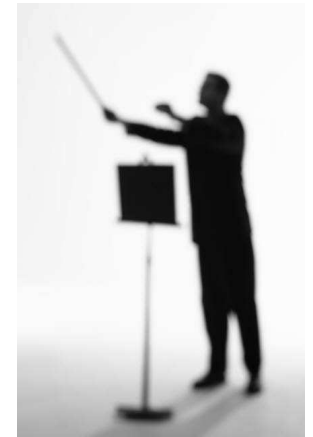
Facilitator or Presenter?

A Facilitator:

- Listens
- Asks questions
- People participate
- Knows very little
- Multidirectional exchange of information

A Presenter:

- Speaks
- Answers questions
- People listen
- Knows his/her topic
- Broadcasts one-way



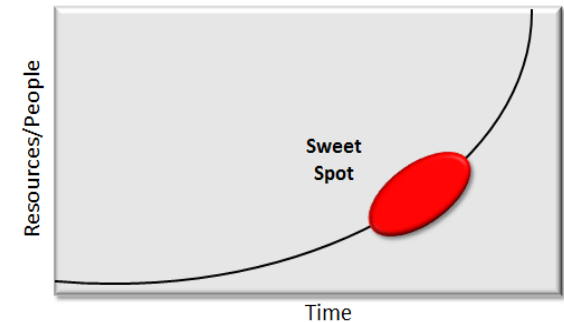
When do you need Facilitation?

- Project spans multiple lines of business or departments
- Significant strategic initiative
- Highly politicized situation
- Never been done before
- External input is required
- Change that needs broad support and consensus
- Requirements are all over the place



The Facilitator's Role

- Before
 - Review Project Charter
 - Draw up the agenda
 - Invitations, logistics and education
- During
 - Guide the team through the agenda activities
 - Document information and decisions
 - Check for consensus
- After
 - Prepare Project Scope Document



Technique 1 - **CARDIO**

- Ensure all stakeholders share a common language and understanding when discussing the project



What is **CARDIO**

- Acronym for a healthy project
 - Constraints
 - Assumptions
 - Risks
 - Definitions
 - Issues
 - Out of Scope



How to Facilitate **CARDIO**

- Capture on flipcharts
- Ask people to help
- No time on the agenda (except at the end!)
- Collect throughout the workshop
- Process Risks, Assumptions and Issues
- Don't sweat it!



Technique 2 – Requirements Brainstorm

- Define and prioritize project requirements as the basis of building a well-defined project plan



What is Requirements Brainstorming

- People voice their expectations of the project
- Judgment-free process
- Uncovers hidden or unknown views
- Uncovers misunderstandings
- Allows sponsors to realign



How to Facilitate Requirements Brainstorming I

- Provide stickies to participants
- Participants submit their requirements
 - 1 requirement per sticky
 - Be explicit
 - Initial
 - No comment!
- Collect by walking around
- Read each sticky out aloud
 - Prevents multiples
 - Sparks additional ideas
 - Can I read this?
- Stick in a central location



How to Facilitate Requirements Brainstorming II

- Categorize your requirements
 - R: Regulatory Requirements (legally mandated)
 - C: Core Requirements (essential to business and project)
 - V: Value-add Requirements (not critical, but desirable)
- Discuss, explain, refine
- Add/ move to CARDIO items
- Cluster similar requirements in blocs
- Dot-vote to establish priorities in each category



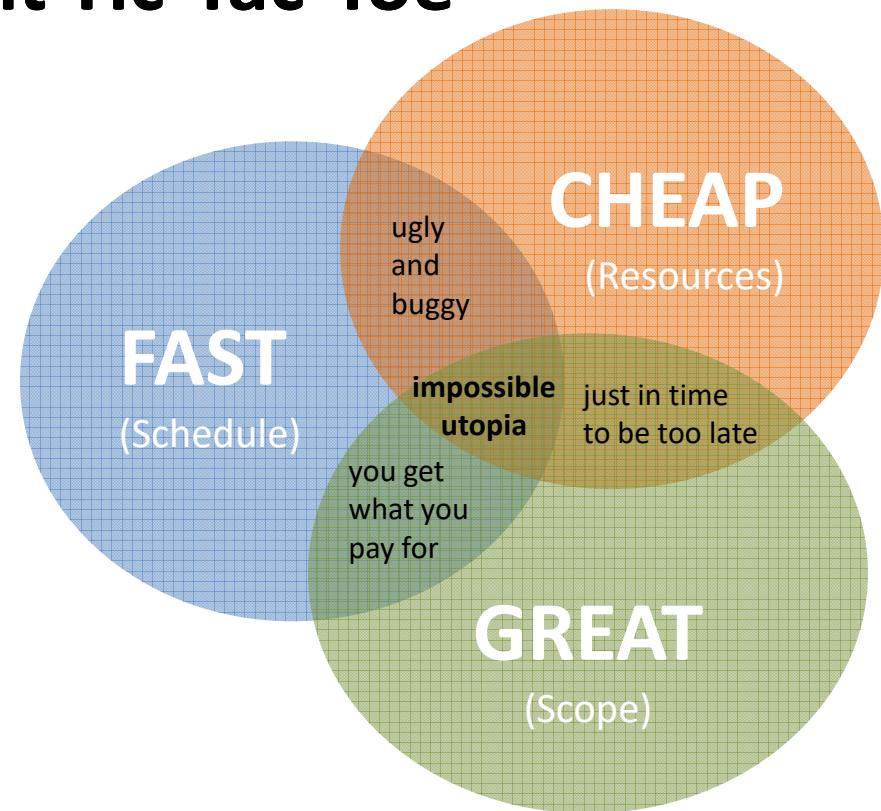
Technique 3 – Triple Constraint Tic-Tac-Toe

- Establish clear project priorities for scope, schedule and resources



What is Triple Constraint Tic-Tac-Toe

- Allows the PM to understand customer constraints
- Establishes the delivery strategy



How to Facilitate Triple Constraint Tic-Tac-Toe

- Provide matrix on flipchart
- Ask customer to determine priority
 - Only 1 “X” per column
 - Explain and document “Why?”
 - There is no right or wrong way

	Least Flexible	Optimize	Most Flexible	Why?
Scope				
Schedule				
Resources				



Technique 4 – Success and Failure

- Understand and evaluate how the customer will ultimately view the project as successful



What is Success and Failure

- What will stakeholders view as a successful project?
 - Value
 - Use
 - Learning
- Link between the success-criteria and the scope of the project?
- Are the criteria SMART
- Benchmark before you start?

Success Criteria	Project Manager	Users	Sponsor	Top Execs.
Time	1	5	2	4
Product	2	2	3	5
Cost	3	6	4	3
Value	4	3	1	1
Use	5	1	5	2
Learning	6	4	6	6

Nelson, R. (2005). "Project Retrospectives: Evaluating Success, Failure, and Everything in Between," *MIS Quarterly Executive*, Vol. 4, Nr. 3, pp. 361 – 371

How to Facilitate Success and Failure

- Address the overall project
- Address individual Major Deliverables
- Ask open-ended questions
 - Can you describe what success/failure would look like?
 - How do you think we can measure this?
 - What data do you have on the current state?
- Capture information
- Connect to the mandate of the project
 - Push back?
- Work the Definitions sheet of CARDIO



Seven Attributes of a Successful Facilitator

- Respect Others (and yourself!)
- Listen with Empathy
- Clarify Understanding
- Ensure Involvement
- Communicate Successfully
- Tell Stories
- Provide the Group with Guidance



Questions?



Contact information:

Eleonore F. Pieper PhD, PMP, CPF

ProjectEcologyOnline.com

469 556 4657

epieper@projectecologyonline.com

 <https://www.linkedin.com/in/efpieper/>

Thank you very much for your interest!