

by Carl A. Singer, PMP



Leveraging a Worldwide Project Team

Working around the clock took on new meaning for a project team that used a 24-hour clock for the good of the project.

SUCCESSFUL MULTINATIONAL corporations draw talented teams from throughout the world. Although we have learned to cope with worldwide project teams by harnessing communications tools and sharper processes, we must seek to go further by leveraging such teams.

Experience is a key component of IBM's success in the service industry. By "freeze drying" specific expertise and experience and effectively sharing it among its practitioners and customers, IBM reaps the benefits of "shared" or "reused" experience.

In the summer of 1999, to meet urgent customer needs, a team of subject matter experts (SMEs) was identified, recruited, and assembled to document existing best practices in the maintenance domain and to port these into a proprietary knowledge management/engagement management tool. The most experienced and effective SMEs available were on opposite sides of the globe—Australia and Scotland. Review and control of the project was from the United States. Due to "docking" considerations with other projects, the project team was under extreme time pressure during major development phases and during the significant multiproject review and integration phases inherent to the project.

Just working harder and smarter was not going to be enough to meet time and quality targets. For this worldwide project we used the dimension of time to our benefit. Applying sound management fundamentals as well as innovative approaches, this multinational project leveraged the different workdays of the team to provide a virtual 24-hour workday for quick responsiveness and accelerated reviews.

Project Team Characteristics

All project participants were senior professionals, well accustomed to the rigors of consulting and critical projects. Each was expected to work independently and interdependently. Ego-free

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group decisions were made and adhered to. The two overseas subteams had prior experience working together. A local manager/point of contact was established for each subteam. Mutually agreed to targets, constraints, terminology, and processes oiled the way for significant independent work.

Project Phases

The following is a brief discussion of the various project phases and how the global nature of the project was taken into account (both as a constraint and as an opportunity).

Preplanning. Although one cannot anticipate all situations, one must give an honest effort to planning as well as dealing with contingencies. A preplan was developed and shared with the team. This preplan included a skeletal project timeline and plan; identification of gross schedule conflicts (vacations, other commitments, and the like); preliminary list of foreseen major issues; working list of expected deliverables; and gathering of

The Time/Place Matrix

Time/Place	Same	Different
Same	(Same Time / Same Place) Face-to-face meetings Enhanced by "team room" technologies, graphics, etc.	(Same Time / Different Place) Communications Laden Telephones, fax, e-mail, videoconferencing network meeting tools
Different	(Different Time / Same Place) "War Rooms" Operations centers Intense hand-off processes	(Different Time / Different Place) Repositories and e-mail Document archives Project control books

Exhibit 1. The general table of meetings has been expressed as a 2X2 matrix of time and place. This exhibit includes some of the common tools employed in each quadrant and focuses mostly on coping with or overcoming communications barriers when the project team cannot gather in the same room or around the same water cooler.

references and existing artifacts (standards, templates, and so forth). Also a technical envoy traveled from Australia to Scotland to assess, compare, and share existing material.

Big Bang. At project inception it was determined that an "all hands" meeting would be necessary to socialize and form a cohesive team, understand individual

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24-Hour Time Clock

United States (East Coast)	Australia	Scotland	Comments
12 midnight	2 PM	5 AM	
1 AM	3 PM	6 AM	
2 AM	4 PM	7 AM	
3 AM	5 PM	8 AM	
4 AM	6 PM	9 AM	Australia handoff for off-shift review
5 AM	7 PM	10 AM	
6 AM	8 PM	11 AM	<i>3-Way Conferencing Window (Primary)</i>
7 AM	9 PM	12 noon	<i>3-Way Conferencing Window (Primary)</i>
8 AM	10 PM	1 PM	<i>3-Way Conferencing Window (Primary)</i>
9 AM	11 PM	2 PM	
10 AM	12 midnight	3 PM	
11 AM	1 AM	4 PM	
12 noon	2 AM	5 PM	Scotland handoff for off-shift review
1 PM	3 AM	6 PM	
2 PM	4 AM	7 PM	
3 PM	5 AM	8 PM	
4 PM	6 AM	9 PM	<i>3-Way Conferencing Window (Secondary)</i>
5 PM	7 AM	10 PM	<i>3-Way Conferencing Window (Secondary)</i>
6 PM	8 AM	11 PM	U.S. handoff for off-shift review
7 PM	9 AM	12 midnight	
8 PM	10 AM	1 AM	
9 PM	11 AM	2 AM	
10 PM	12 noon	3 AM	
11 PM	1 PM	4 AM	
12 midnight	2 PM	5 AM	

Prime Time	
Secondary Time	
Down Time	

As can be seen in the above chart, the sun rarely set on this project.

Exhibit 2. The 24-hour time clock details the relative workdays for the three project subteams. This chart is somewhat pedantic to illustrate the general time principles. The project team was both much more flexible in its scheduling and work commitments.

strengths and weaknesses, understand local and projectwide constraints and goals; to develop, socialize, finalize, and agree to project plan; to identify and resolve issues; to understand and hone standards and templates; to carve out preliminary deliverables and assign deliverables to the subteams; and to identify “open” issues and create work-off plans.

The all-hands meeting was held as soon as scheduling permitted. In addition to the international project team, project management and SMEs from major inter-

facing projects were present. The meeting was held at a corporate campus location with on-site hotel and dining accommodations. This facility might be considered “an assisted living community” for consultants. This hastened recovery from jet lag and provided a work-oriented, interruption-free setting in a collegial atmosphere. Additionally, the meeting room was fully equipped with electronic (recording) whiteboards, printers, LAN ports, and full audiovisual facilities. A highly responsive facility staff catered to

our every need and eliminated down time and clerical chores.

Eighty percent of the work was done during this intense one-week session. The remaining 80 percent was completed during the remainder of the project. (If you don’t understand the math, then you probably don’t work with “real” projects.)

Independent Work With Time-Phased Peer Review. The subteams did the majority of the deliverables creation independently. For about a one-month period, this work went on with e-mail, ad hoc telephone calls,

and periodic three-way conference calls to maintain synchronization. A project control book (document repository) was established to provide all hands with concurrent access to the latest project artifacts (outputs, drafts, and issues). Team members participated in a daily, round-the-clock, round-the-world, review cycle.

Intense Interfacing. The final project phase consisted of intense interface and reviews within the project and then among other projects. These external reviews necessitated changes as well as “push back” to deal with concerns, differences among projects, and other issues. It was here that the worldwide nature of this project was again leveraged. Using a “dry cleaning” approach (in by 5 p.m., out by 9 a.m.), team members in Australia and Scotland were able to address issues generated during U.S.-based external reviews and provide concrete responses by the beginning of the next business day. Conference calls at 6 a.m. (U.S. Eastern Standard Time) were used to coordinate responses and resolve issues. Conference calls at the end of the U.S. workday and early evening e-mail messages were used to finalize issues and assignments. The three project subteams relied on the same time/same place matrix (shown in Exhibit 1) and 24-hour time clock (shown in Exhibit 2) to align their communication schedules.

Communication Modes

Same Time/Same Place. As described in the “big bang” phase of this project, there was tremendous technical and social value in getting everyone together off-site, away from their daily responsibilities in an intense weeklong working session.

A fully equipped room facilitated communications. Especially helpful were the ability of individuals to display material by connecting their laptops to a projector and the ability to capture notes and drawings via the electronic whiteboards.

Same Time/Same Place implies that the participants are engaged. With cell phones, pagers, and LAN e-mail connections, people can be present in the room but not engaged. This was overcome by mutually agreed to rules of courtesy and by providing realistic breaks to enable participants to check mail and reply to messages. The worldwide aspects of the team had impact

here in that U.S. participants were in the midst of their normal workday; Australia was “dark,” hence few messages from home; and Scotland received messages only in the morning.

Same Time/Different Place. Telephone conferencing was the primary mode here. Preparation included developing a detailed, flexible agenda; distributing invitations and

ument annotated with suggested changes. Similarly, one could start one’s day by checking an in-basket populated with documents to review, issues to respond to, and questions.

Clearly, all project documentation, including plans and schedules, notes, deliverables, issues, was maintained in “soft copy” to enable such communication. To further facilitate exchange, an agreed-to suite of tools

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gathering responses to determine who would be in attendance (no waiting for “Joe” only to find out Joe wasn’t going to be able to make today’s call); and predistribution of key documents that would be targeted for review. Videoconferencing was not employed due to costs, setup lead-time, and because it would force participants to leave their offices. Similar network-based meeting tools were not employed, as the animation that these enable provided little added value to the discussions.

Different Time/Different Place. E-mail was used extensively for general communication, meeting setup and invitations, and responsive document sharing. Lotus Notes® was the e-mail vehicle used throughout this project. Complementing the e-mail document exchange, a formal document repository was used to allow all participants ready access to the most current documents. This repository, based on a proprietary Notes-oriented tool, allowed authorized participants to have a local replica of all documents and to automatically synchronize the local copy with the master copy. This repository is a fundamental need for robust document management.

Configuration control, facilitated by sound processes and a repository tool, was crucial.

The round-the-clock nature of the team was enhanced by using Notes to share concerns and for handoff of assignments (multi-authored documents, document reviews, and so forth) somewhat seamlessly. In practice, a participant could draft a document and send it off to the “ether” at day’s end and wake up in the morning to find the doc-

(word processor, spread sheet, scheduler) was selected and tool copies were purchased for all participants who needed them.

Although it may seem trivial, the team agreed to use U.S. standard (8 1/2 X 11) paper, thus avoiding printer stoppages for A4 paper. In a similar vein the “British” English spelling dictionary was adopted by the entire project team. Organizational standards aside, this certainly was helpful. “G’day” and “Cheers” have crept into our U.S. speech—a sure sign of team cohesion.

Lessons (re-)Learned

Whenever one participates in a project one re-learns lessons from previous projects. I’ve culled those significant lessons that reflect the worldwide nature of this project.

We learned a number of positive lessons, such as:

- Loosen reins. Let professionals understand the goals and deliverables, then step out of their way. This is especially true in a worldwide project that lacks physical and temporal proximity. As always, mutual trust is the basis for all team undertakings.
- Realize the importance of having a big-bang, all-hands kickoff to get to know each other, to establish and share goals and processes, and to get significant work started. Emphasize engaged participants and “rules of courtesy.”
- Establish and enforce agreed-upon quality standards, deliverable templates, and so forth. Insist that all project-related documentation be in “soft copy,” using agreed-upon tools.

■ Remove technical obstacles and other time wasters by assuring a robust communications-oriented environment.

■ Establish and maintain regular scheduled conference calls, even if only to say, "Hello, we have nothing to talk about today." As with all meetings, have a prepared agenda, take notes, follow up, and use good meeting management techniques.

■ Maintain a deliverables scorecard. Always review and replan against this scorecard. This work product approach continuously keeps the target in focus. (In my nomenclature, a *work product* is the output of any task or activity. A *deliverable* is simply a work product that is seen by the customer. Thus internal work products are not deliverables.)

■ Implement configuration control, change management, and impact analysis, which are especially important for managing the deliverables in this environment. A document repository was the key enabler here.

■ Maintain good cheer and a positive, can-do attitude. To quote a former colleague and mentor, Gen. Colin Powell: "Perpetual optimism is a force multiplier."

Based on 20/20 hindsight and introspection, here's what I would do differently if I had to do it all over again:

■ Anticipate more of a "slump" upon return from the big-bang meeting. Jet lag and catching up with one or two weeks (including travel time) of backed-up e-mail messages need to be scheduled into the plan.

■ Understand and deal with inevitable "local" disruptions; plan at an 80 percent available time to account for nonproject disruptions and responsibilities. When you use senior people they are often multitasking and always in demand by others.

■ Establish earlier, and more clearly, roles and expectations with worldwide external interface and review organizations. The ease of working with "my" worldwide team

lulled me into complacency regarding dealing with other teams. Formal documents of understanding are required.

OUR PROJECT WAS TO BETTER SERVE OUR customers by documenting best practices in the maintenance domain and making the information available to our resources through a proprietary knowledge management network. At first glance, the task was especially daunting because our team was spread around the world. In retrospect, by adding the Earth's rotation to our team, we developed a method that allowed the team to do our customers' and their own work better.

Sir Walter Scott wrote in *Life of Napoleon* [1827]: "The sun never sets on the immense empire of Charles V." We would never presume to be so grand, but because of the way we worked the clock, we can surely say that the sun *rarely* set on *our* project. ■

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