

Project Management Book

How to manage projects in organisations whose primary business isn't project-based

"A project is one small step for the project sponsor, one giant leap for the project manager."

Chapter 3 - Roles and Responsibilities

What makes projects such fun is that they are all different. And because they are all different each will need a unique project organisation chart.

If roles and responsibilities are not clear many problems will result:

- ultimate source of authority unclear: poor leadership
- people do not know their responsibilities: people will not do what they need to do to make the project successful
- not clear who can decide what: slow decision making
- others' roles unclear: you don't know who to talk to, poor communications
- unauthorised projects start: nobody's job to authorise projects
- lack of accountability: there's little incentive to do things properly
- resources aren't committed: nobody is held to account for breaking resource commitments
- unclear objectives: project objectives are not owned by anyone, everyone has their own opinion, moving target, potential failure

Free Year Planners

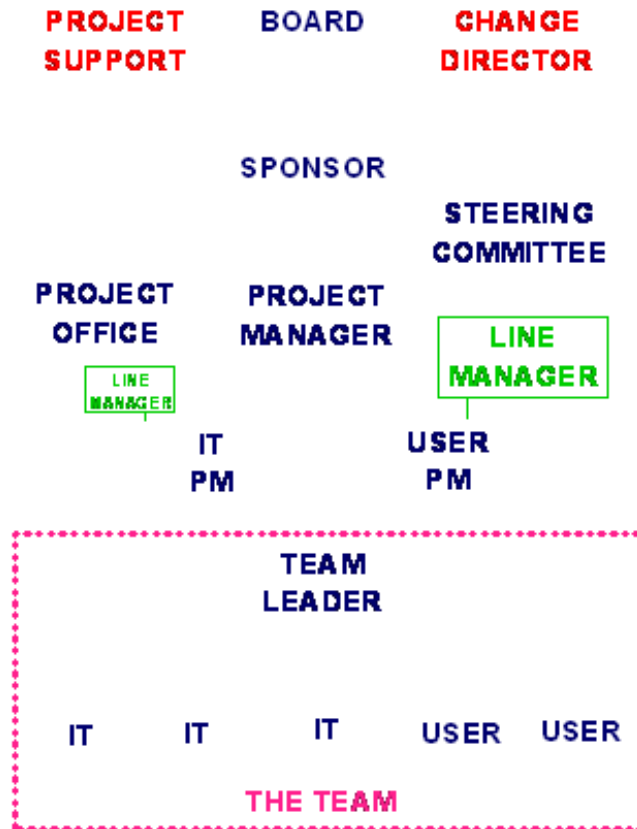
Free wall planners. Opens in new window so you won't lose your place

So, before any project begins we must ensure amongst very many other things:

- a clear management hierarchy exists for the project
- each person has a defined and agreed set of responsibilities
- people will be held accountable by their line manager for performing their project role

Conjure up in your mind a medium to large IT project (or another type of project if you wish). If you feel energetic, find a piece of paper and draw a project organisation chart.

Is yours anything like this one?



Sample project organisation chart

Yours is probably quite different. Does that mean that yours is wrong? No, this isn't a methodology textbook. Indeed, there is no right answer: the organisation chart will be specific to your project.

Let us explore each of the roles in the example above and then consider some other possible project organisations.

One hopes your organisation chart at least had a Project Sponsor. Ever had the experience of asking a sponsor what his role is and getting a rather blank look by way of reply?

Role of Project Sponsor

The first thing to note is that on our chart the box at the top, Board, means Board of Directors. As far as the project is concerned the sponsor is top of the tree. But what is his role, what are his responsibilities?

- Accountable for the project. If it goes wrong the sponsor should be the first person up in front of the firing squad. In companies where the Board of Directors hold sponsors accountable, sponsors suddenly become much more interested in who is managing the project for them - their fate is partly in the hands of the project manager.
- Select, or at least approve, the project manager.
- Acquire funding for the project from the Board of Directors, or whoever it is that authorises funds for projects.
- Champion the project, promote and support it in high places.
- Own the project's business case.
- Accountable for realising benefits once the project is delivered. What effect might this have on prospective sponsors if they know they will be held accountable for the claimed benefits being realised post project? They will probably be a lot more realistic about the benefits they claim in the business case.
- Give the project manager the go or no go at the start of each project stage.
- State and own the project's objectives, have the vision (but beware, there's a fine line between vision and hallucination.)
- Make a presentation at the project kick off meeting, explain why the project is important.
- Act as the project's Godfather, that's Godfather in the Mafia sense: if there is a problem the project manager can't sort out, the sponsor has a quiet word with the offending party and makes them an offer they can't refuse. One hopes the problem will evaporate away, and that next time people will listen to the project manager. Indeed, it is not totally unknown for project managers artificially to engineer a crisis in the early days of a project, identify a

guilty party who is on the periphery of the project, and then get the sponsor to sort that person out very firmly and make sure everyone knows about it. The message that goes out is then very clear: get in the way of the project manager and the sponsor will come down on you like a ton of bricks. This can encourage co-operation with the project manager. (Handle with care.)

- Resolve issues the project manager can't.
- Ensure only needed function is delivered and that money isn't wasted on unnecessary functionality and features.
- Accountable for legal compliance of the finished product.
- Chair project steering committee.
- Empower project manager to manage the project.
- Commission post implementation business case review.

How much work is involved in being a sponsor - how many days a month would it take? It should only be one or two days a month. If you think about it, there are some fairly heavy accountabilities on the list but not much day to day doing - that is delegated to the project manager. Of course it may be more than a day or so at the start or if major problems arise.

How many projects can one person sponsor at a time? Three or four, maybe five? But anything beyond that and the sponsor isn't going to be interested in, or even aware of, some of their projects and they become a name in a document and nothing more.

The trick is to have a sponsor who is senior enough to have the clout your project needs, but junior enough to be interested in your project if it's a small one. There could be several levels of director/manager in your company who can take on the role of project sponsor, the level of the sponsor for any given project depending upon factors such as the project's budget, criticality and the degree of cross-functional involvement. (If HR, Marketing, Engineering and IT are all heavily involved you'll probably need a senior person to be the sponsor.)

How would you feel about having several people acting as co-sponsors - good idea? No: you'd never know who was in charge. But imagine a project comes along and three members of the Board of Directors will benefit equally from it and they are each in effect paying one third of the project's budget. Rather than have 3 co-sponsors, one of the Directors becomes the sponsor. But if you were one of the other two Directors would you be happy to be shut out of the project altogether? Probably not: you'd want to see how it was going and to make sure your part of the business was getting a fair crack of the whip. We have just defined the project steering committee (sometimes known as the project board or even project review board).

Role of Project Steering Committee

Nominally the steering committee comprises the heads of those parts of the company (or companies) that are significantly involved in or affected by the project. So, if it's a large IT project for Marketing, perhaps the Marketing Director would be the sponsor and the IT Director would join him on the Steering Committee. In our example in the previous paragraph, the HR Director might have been the sponsor with the Finance Director and Logistics Director joining him on the steering committee, and let's assume the IT involvement isn't that great and therefore the IT Director will not be on this project's steering committee.

But who decides who should be on the steering committee? In some companies the Standards do! For example they might say there must be a sponsor, a senior customer and a senior supplier. So guess what? Every project has a 3 person steering committee (project board) whether it needs it or not. Who should decide who's on the steering committee? The sponsor should, but the project manager should make strong representations and suggest who would add value, who would actually help the project to succeed - that's why they're there, after all. Also agree with the sponsor when the steering committee should meet: the frequency may well vary during the project's life, and agree the mechanics of steering committee meetings: who will chair them (the sponsor), who presents what, etc.

A steering committee can be a menace: they squabble, cause delay by not making decisions, meddle in the detail - e.g. what colour the heading on a web page should be. (Sometimes called the bicycle shed syndrome: the company board have no strategic ideas or find them too difficult to grapple with so instead they have lengthy discussions about something they can understand - where to locate the bicycle shed.)

By contrast, a good steering committee can be a tremendous asset to a project.

What is the role of a member of the steering committee - what would you want them to do to help you, what would you want them *not* to do?

You would want them to:

- Help the project manager secure resources. So as PM you want people on the steering committee who are the ultimate owners of the bodies you will need for the project.
- Bang heads together within their own domains if their people are having difficulty making their minds up.
- Interact with other steering committee members to resolve inter-departmental disagreements.
- Make timely decisions.
- Publicly back the project manager's decisions.
- Support the project.

But, as suggested above, you would not want them to:

- Meddle in the detail.
- Keep changing their minds.
- Play politics (tricky to prevent!).
- Undermine the authority of the project manager.

Whose job is it to make sure the steering committee members understand their role? The project manager's. Book one-on-one meetings with each of the steering committee members and lay it on the line for them, make it very clear what their role is and what their role isn't. You, as project manager, might be a relatively junior person and you are now having to tell a senior manager or Director what their job is and what it isn't. This requires a bit of courage. It is not without reason that good project managers get paid a lot of money.

Does every project need a steering committee? Not really. If the whole effect of the project will be felt within the sponsor's empire he is almost by definition a one person steering committee. One can debate whether the project manager is on the steering committee or simply attends it. It doesn't matter. But the project manager clearly must be at steering committee meetings.

Project Management Proverbs

Humorous but oh-so-true project management sayings, laws...

Project Management Course

Project management training for team leaders and PMs

[...next](#)

[project management book index](#) [contact us](#) [project management course](#)

[Project Management Book](#)

Copyright M Harding Roberts 2006 2007

www.hraconsulting-ltd.co.uk

Project Management Book

How to manage projects in organisations whose primary business isn't project-based

...chapter 3 continued

Role of Project Manager

What does the project manager do? Many a team member has muttered that question under their breath.

The list of project manager's responsibilities is either very long or very short. The short one is: the project manager is responsible for everything. Let's break that into some of its component parts:

Define and get agreement to roles. If halfway through a project it becomes clear the sponsor doesn't understand his role, whose fault is that? The project manager's. Defining roles means defining roles upwards as well as downwards. Particularly if it is the sponsor's first project, take half an hour to run through with the sponsor what he can do to help his project succeed. Note, his project, not yours. And as we said on the previous page, do the same with each member of the steering committee.

Some projects go nowhere because senior managers aren't clear what the project is really trying to achieve. If you suspect this is the case take them offsite for a day and get them to sort themselves out and hammer out a clear mission statement for the project. In one case that comes to mind a project had set out to be all things to all men. After several false starts a new project manager was brought in. He made the Directors clarify the project's goals and strip down the project scope, and only then did useful things start to get done.

Secure resources and fashion into a team. Getting promises from Directors - the steering committee - to provide people for the project is one thing. Getting the managers who directly own those people actually to release them is quite another thing. We will address this in a later chapter.

Having acquired the bodies, you will need to do some team building. This could just be a get together meeting. But if your team comprises people from IT, HR, Finance, Marketing, Logistics and Admin, and there has historically been antagonism between some of these groups consider something grander. A weekend canoeing and abseiling may cost a few thousand but this investment in team building could save you a lot of money and a lot of stress later in the project. Definitely worth considering for larger projects.

Plan the project. This covers a multitude of activities. The degree to which the project manager personally plans the project will depend upon its scale. If there are three people in the project team the project manager can easily plan their work. If there will be 300 people in the team the project manager will clearly need to delegate the detailed planning.

Design project control mechanisms. How will you report progress, control change, manage risks, etc? Every project is different, you will need to design control and reporting mechanisms that suit your project or at least adapt and modify any standard processes that are available within your company.

Manage project scope. If the scope is simply too big for the budget and timescale the project will fail. If you carve out a doable scope but then let it grow uncontrolled as you go along the project will fail. Managing project scope boils down to learning how to say the most important word in the project manager's vocabulary: "no". More on this in the next chapter.

Manage and report progress. This rather assumes there is progress to report, of course. We will cover tracking, controlling and reporting in a later chapter.

Be accountable for quality. The project manager's appraisal should depend not only upon meeting dates and budgets but also upon the quality of what is delivered. Even if the project manager is managing a project that is outsourced to a software supplier the project manager in the commissioning company should be held accountable for the quality of the software delivered by the software house. Sound unreasonable? Well, *someone* must protect the company from the potentially disastrous consequences of implementing a system that doesn't work. If not the project manager, who? After your company has gone bankrupt it's a bit late to sue the software supplier. See the chapter on quality management.

Reward and punish. Handing out the occasional small financial award to a team member who has excelled can really boost team morale, if they view it as well deserved. Where does the cash come from? The sponsor, of course. Or put another way, put a line item in the business case headed "team awards and rewards".

Characteristics of a Project Manager

What characteristics do good project managers share? As you would expect project managers are a pretty diverse bunch, but certain personal traits may help.

First and foremost they like managing projects. Managing projects is not something people are neutral about. They either like it or they don't. Why would anyone want to do a job in which you can all too obviously fail spectacularly and if you succeed people will shrug their shoulders and say you just did your job? Others relish the challenge and like the feeling of accomplishment, of getting something done that may not have happened without them.

Good project managers:

- manage rather than co-ordinate, preside or spectate
- are natural planners
- don't like surprises, so they plan thoroughly to try to prevent them
- are effective fire-fighters - when the inevitable surprises do occur they sort them out quickly and decisively
- reward and punish - not dealing with someone who isn't pulling their weight can destroy team morale
- are good motivators, good team builders
- address conflict rather than leaving things to fester
- do not hide in an office, they walk around and ideally sit physically in the middle of the team so they are approachable
- get consensus whenever possible but dictate when necessary

Project managers need all the personal skills that any manager needs so project managers should not only attend courses that teach them how to manage projects (may we plug this excellent [project management course](#)) they should also attend people management training: leadership skills, influencing skills, appraisal skills and so on.

Most of all, good project managers MANAGE. They do not just get swept along by the current (see [The Tale of Three Project Managers](#)). They grab the project by the scruff of the neck and manage it.

However, it is sometimes the case that project managers do not feel sufficiently empowered to manage and control the things/people they need to manage and control in order to be successful. This problem has a solution.

The sponsor should make it clear to everyone that the project manager is operating with the sponsor's full authority: "take issue with the project manager and you are taking issue with me; disagree with him and you are disagreeing with me; I don't care how senior you are, what the project manager says is what I say. Now if he's obviously got it completely wrong come and have a word with me, but other than that what he says is what I say."

Will the sponsor think of making some public pronouncement like that at the beginning of a project? Probably not. Whose job is to write the script for the sponsor? Yes, the project manager's.

How many project managers should a project have? One. That is, one reporting to the sponsor. The project manager may need others below him managing parts of the project or specialist teams, but there is only one project manager accountable directly to the project sponsor.

Project Manager Career Path

And who should this project manager be? An IT person, a business person, an external consultant? If the project is installing new servers with little or no effect on the users (one

hopes) it may well be appropriate for an IT person to manage that project. But a project to develop a new software system that will run a key part of the company's business? That is a key business project and should be run by a business person. A significant proportion of the project team will be business users and they will do the most important tasks in the project: defining the business requirements and ensuring the proposed system design meets the business requirements and will be useable.

However, because process-based companies don't naturally breed project managers there may be nobody in the business with the requisite project management skills. This is an argument for nurturing project management skills in the business, not an argument for leaving it all to IT. Some companies, recognising that projects determine their future, are actively growing PM skills in the business. Training is obviously part of the answer. For non-critical projects assigning a business person to the role of project manager supported by a PM from IT aids skills transference. For a large project, bringing in a consultant project manager and assigning a business person as his deputy can also be an effective way of learning the project management ropes.

(Though beware some consultant project managers: bringing in a Californian PM who *knows* he can get the project done in 6 months when everyone else thinks it'll take a year can be dangerous. You may discover too late that his 6 months pre-supposed the project team would work 90 hours a week whenever he asked them to. Whilst that may have been true on his previous project in Silicon Valley, public sector employees in provincial England may feel more comfortable sticking to their regulation 35 hour week and give such a suggestion pretty short shrift.)

In larger process-based companies that nevertheless need to do an increasing number of projects to live long and prosper, it may be appropriate to have a small group of professional project managers reporting to a Director who acts as their career manager (the Change Director on the project organisation chart). These PMs could be ex-IT, ex-Finance, ex-consultants - but their passports now say "Project Manager" rather than "Accountant" or whatever. These '3 star' project managers would stand ready to manage the company's major projects. And if the project manager's line manager is a Director the project manager comes with a degree of ready made authority.

Two star PMs might be business line managers who from time to time manage medium sized projects, and one star PMs are business people just dipping their toes into the project management water. But we have a conscious project manager development programme within the business.

If projects determine the company's future it may be wise to have senior, competent, professional project managers managing those projects.

What's the difference between a project manager and a project director? About fifty thousand a year. Someone managing a really big project will often have the title project director to reflect the scale of the role. So our 3 star PMs may often take on the title project director when managing large projects.

Strictly speaking programmes never end - projects do. BMW might have a never ending (they hope) 3 Series programme. Within that there will be a project to develop the next version of the BMW 3 Series and even an overlapping project to start thinking about the 3 Series model after that. However, you will sometimes find large one-hit projects referred to as programmes. They may consist of many parallel projects (e.g. software development, hardware installation, office move, user training) which will all end at more or less the same time. The boss is called the Programme Director and may have many (sub) project managers reporting to him. Titles don't matter too much as long as the roles and responsibilities are clear.

Speaking of titles, the HR department in some organisations inhibits progression to a more project-friendly culture. In one example the HR department refused point blank to allow a person to take on the role title of project manager because he wasn't a Manager grade employee. And the idea of giving someone the title of project director would have been enough to cause apoplexy up there in HR's ivory tower. Also, in some parts of the public sector it can be difficult to pluck someone from the ranks, give them the temporary title of project manager and pay them a bonus if they bring the project home successfully. That upsets quite a few applecarts. All part of the process-based, project-inhibiting culture that we need to work to overcome.

Project Management qualifications are increasingly popular. However, if someone has attended a 5 day course and passed the end of course exam (Prince2, PMI, APM, ISEB, etc) that of itself tells you nothing about that person's ability to manage projects.

Have we covered everything a project manager needs to do? Not yet. You might say that the whole of this book is about what the project manager has to do or get someone else to do for him.

[...next_](#)

[project management book index](#) [contact us](#) [project management course](#)

[Project Management Book](#)
Copyright M Harding Roberts 2006 2007
www.hraconsulting-ltd.co.uk

Project Management Book

How to manage projects in organisations whose primary business isn't project-based

...chapter 3 continued

Role of Project Office

In a 6 person project the project manager can handle the project admin himself. In a 60 person project the PM will need a project office to handle the admin for him:

- acquire office space, order equipment
- set up and administer cross-project mechanisms such as change control and issue logging
- consolidate sub-project reports
- financial tracking, adding up the numbers for the project manager
- project librarian
- etc.

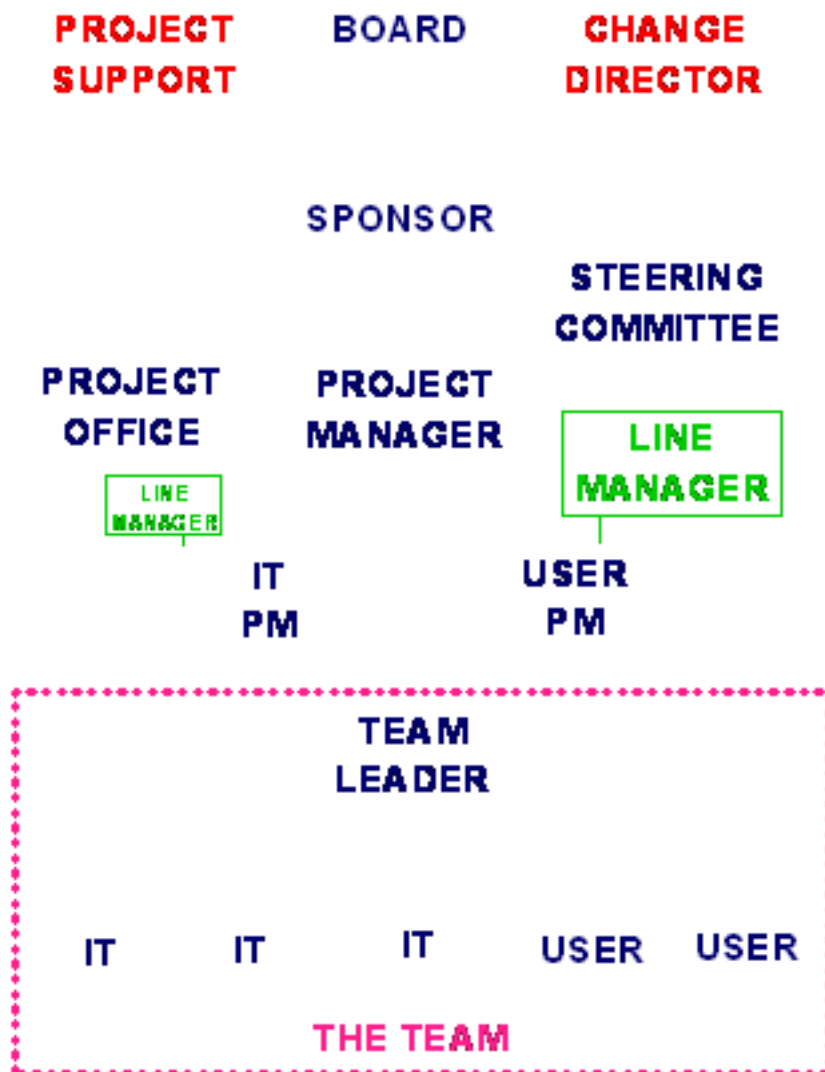
Should the project office produce, own and update the project plan? No. This is a job for the team leaders as we shall see.

The project office provides admin support to the project manager, they do not manage the project for him. In a large project there can be literally thousands of documents and version of documents: without first class version control the project would soon descend into chaos. Want to know how many issues have been open for more than two weeks? Ask the project office. Or, if you want to get this information instantly on your laptop at any time of the day or night, ask the project office to set it up for you. A good project office is vital in a large project. Civilisation is underpinned by the competence of its administrators.

Role of Project IT Manager

If the overall project manager of an IT project has little or no IT knowledge they will need someone from IT to pull together the IT team and manage their activities and report their progress. This role is very similar to that of the overall project manager, if less broad in its scope.

Role of Project User Manager



Some would argue that the project user manager role is the most important role on a software project, the most difficult to perform and the role least likely to be properly defined or assigned. A pretty deadly combination. Furthermore some methodologies don't properly include this role.

However big the project there is only one project user manager. If it's time for a cup of coffee wander off and see if you can list, say, three specific responsibilities for this role. Glance at the organisation chart to see where the user PM sits in the hierarchy.

This is what the project user manager should do:

Represent all who will use the project's deliverables. Ensure that all users have a voice and their needs and views are considered by the project.

Find and commit business resources. It's all very well for the

steering committee to make well-intentioned promises of boundless user people to work on the project. The project user manager has to (on behalf of the project manager) go out into the business highways and byways to prise out real, named, warm bodies to do all those things users need to do: define requirements, agree designs, user testing, etc.

Arbitrate amongst users. Users in Finance may want things done one way but users in Marketing think the requirement is quite different. The project user manager has to be empowered to resolve such disagreements so that a single view of the users' requirements can be given.

Sign off the requirements document. The project user manager signs off the requirements document which says to the sponsor: "your requirements have been fully defined and are complete and correct." And if they later prove not to be, the project user manager won't be getting much of a pay rise this year. Quite an accountability.

Sign off the User Functions Design document. At the end of the User Functions Design step, the user project manager signs off the UFD document: "Sponsor, the User Functions

Design document is complete, correct, satisfies our business requirements and the system as designed is useable." And if it *isn't*... An awesome accountability.

Put yourself in that position: you are accountable for the correctness of the design for some huge new system that will eventually run your company's whole business. We are at the start of the User Functions Design step: we are building the plan for that UFD step. In two month's time, when the UFD document is finished, you must sign it off. Would you do nothing for the next two months, and when the document arrives on your desk shut your eyes and sign it then take it to the sponsor and say: "it's fine, you can sign this off, sponsor"? Don't think so.

As part of the planning of the design step you approach, let's say, the marketing manager and ask for one of his people to work full time for the next two months in the design team to ensure that the design meets the requirements Marketing have specified. But the marketing manager says although he'd like to help he cannot spare anyone for that. And you get the same brush off from every other business area you approach. What would you do (other than panic)? You would have to say to the project sponsor (directly or via the project manager): "Sorry, sponsor, I cannot perform that role. The role has no meaning unless it is me marshalling representatives from each business area and making them, and the people they represent, think through whether the design really does meet their needs and making them sign off on behalf of their domains. Only then could I sign off to warrant to you that the design really does meet your business needs."

The sponsor has just discovered he has a problem: he hasn't got adequate user involvement to ensure that the design will meet the business (i.e. his) requirements. If he (via the project manager) hadn't given someone this rather awesome accountability he might never have known - until it was too late.

In some methodologies this accountability is assigned to a member of the steering committee (project board) but that senior manager or Director might only devote a day or two a month to the project. We are talking here about a project user manager who works full time on the project to make sure the design is correct from the users' perspective. What we are suggesting is not at odds with these methodologies: it is, to be charitable, a way in which that steering committee member's responsibility may be delegated and meaningfully discharged. To be uncharitable it fills a fatal, gaping hole in some methodologies. Some methodologies' reluctance to assign such a significant responsibility to anyone below Director level may be borne out of a perception that it would be "unfair" to give such a responsibility to a more junior person. But the result can be in practice that *nobody* on the ground is truly accountable for the requirements and design being correct and - guess what - they won't be correct and the fun starts when the system goes live.

Authorise change. Having signed off the UFD document someone must authorise subsequent changes to it. As we will see in a later chapter the project user manager has a key role to play here.

Sell the project to the business. Explain to all affected parties what's coming and when. Set their expectations appropriately. On a big project this can be quite a big endeavour with

road shows, executive briefings, demos and so on. But if, when the users get it, they all complain it's nothing like what they expected the project user manager has some explaining to do.

Manage acceptance. Acceptance Testing, if you insist. The project user manager signs off at the end of testing and says the system is fit to go live. If there is going to be a user acceptance testing step the project user manager might even project manage it.

Training and implementation. Listed last, but this starts in parallel with the IT Technical Design step and includes designing and building user training materials, developing the roll out plan and then near the end of the project executing the training and roll out plans. In really large projects, implementation, training and roll out, etc is such a large undertaking that it may well have its own dedicated (sub) project manager. Just another example of the infinite number of possible project organisation variations that the project manager must select from.

Now, if you're screaming at the page

- a) surely the project manager should do all of the things we have ascribed to the project user manager, or
- b) surely the team of super users, one from each user domain, should do all of those things it's probably because your experience has been of a) much smaller project or b) much larger projects than we are assuming for the purposes of illustration. (Though even on huge projects there should be one project user manager managing all those super users.) We will consider much smaller and much larger projects in a moment.

In summary, the project user manager is responsible for ensuring the project will meet the needs of the business.

[...next](#)

[project management book index](#) [contact us](#) [project management course](#)

[Project Management Book](#)
Copyright M Harding Roberts 2006 2007
www.hraconsulting-ltd.co.uk

Project Management Book

How to manage projects in organisations whose primary business isn't project-based

...chapter 3 continued

Role of Team Leader

Our chart shows one team leader for simplicity. There could be many, both amongst the IT team and the business users. Typically they might look after a team of 6 to 8 people - maybe more, maybe less. What do they do?

Detailed planning. Produce the task-by-task, day-by-day plan for each of their team members and liaise with other team leaders to ensure teams' plans interlock. In large projects a member of the project office may facilitate this plan interlocking but beware, the plans must remain the property of the team leaders: if the plans are the project office's the team leaders may not be quite so committed to achieving them.

Control and report team's progress. The team leader manages and reports upon the work of his team. We will cover the mechanics of this in the chapter on tracking, controlling and reporting.

Ensure the quality of the team's output. In much the same way that the project manager will be held accountable for the quality of the project's outputs, the team leader will be held accountable for the quality of his team's outputs. Neither diminishes each team member's quality accountability as we shall see in the quality management chapter.

Technical leadership. IT team leaders usually provide technical leadership, guidance and coaching to more junior team members. User team leaders similarly may have greater business experience than their team members. A good team leader will develop the skills of his team members, support and encourage them.

Later chapters will cover the mechanics of estimating, risk management, planning, tracking and so on. Whereas in a small project the project manager will do all of this himself, in larger projects the team leaders do much of it, so in a sense the next several chapters explain many of the tasks a team leader would perform.

The role title project leader is sometimes used as an alternative to team leader (and even sometimes as an alternative to project manager). In large projects, beneath the project manager may be one or more project leaders and beneath them team leaders. And even sub

team leaders below them. It just depends on the scale of the project. Apparently the project team that built the biggest of the great pyramids was around 13,000 strong (peaking at 40,000 - and you thought your project was big!) and had a project organisation that any project manager today would recognise: sponsor, project director, sub-project managers, team leaders, sub-team leaders and tightly knit teams doing the actual work. Project management is not a new invention. How *did* they manage it without Prince2 and MSP?

Team leaders manage the work of their team. Team leading is a good first step on the project management ladder. You will learn much more about managing projects by being a team leader in a large project than you will by managing a small project - you will get experience of many more control processes because many of those processes simply aren't needed in small projects.

We mentioned in the previous chapter the benefit of UFD design team members being present in requirements definition sessions and technical designers participating in the user functions design step. Ideally The UFD design team members will go on to become the team leaders in the technical design, build and test steps: this gives real continuity and carries the understanding of the users' requirements right through the project's life.

Role of Quality Leader

(Not shown on the chart). This is a member of the project team who ensures that appropriate quality checking activities are included in the project plan and that the team perform these tasks properly. This role will be defined in the quality management chapter as will the role's position in the organisation chart.

Role of Team Member

Even the lowliest team member has some part to play in the management of a project:

- help to estimate the work that will be assigned to them
- help to plan their own work
- sign up to their task plan
- report status of their work
- be accountable for the quality of their work
- alert their team leader of problems and issues etc
- suggest improvements to the project plan, control processes, etc...

Free Year Planners

Free wall planners. Opens in new window so you won't lose your place

The extent to which a team member can contribute to estimating and planning will obviously depend upon their experience, but the team leader (or project manager in a small project) should involve all team members in planning. This not only exploits their knowledge and experience but helps get their buy-in and commitment to the plan: it's their plan, not one imposed upon them from on high.

Role of Line Manager

This is not a project role yet line managers - the managers who own the people working on the project - can have a big influence on the project's chance of success.

Put negatively if a line manager has agreed that one of his people can work full time on the project for, say, the first two weeks of June but when June comes around he reneges and doesn't make the person available, that could cause major problems for the project. If June is eight months away from the project's delivery date it's hard for business managers who have little or no experience of projects to believe that this can possibly have any significant impact on the project. But non-availability of that person could have severe knock-on effects to the project schedule, and if that sort of thing happens repeatedly the project will be in trouble.

So, being positive, what should line manager's do?

Commit resources. At the start of each project stage line managers commit, in writing, to release people - where possible named individuals - full time or part time at specified times. This implies thorough planning by the project manager and usually involves a good deal of negotiation.

Make people available as committed. Don't renege!

Manage careers. If a line manager makes someone available full time for six months to work on a project he nevertheless remains that person's line manager and must keep in contact with them. Ensure they don't feel cast out, assure them there is a job for them to go back to when the project ends. Manage their career.

Reward project work. When a person's project assignment finishes reward them for that project work. For example, if they spent half of their time over the past year on a project or projects, half their appraisal should depend upon how well they did that project work. But how does the line manager know how well his people have performed on projects? He asks the project manager.

This is a classic symptom of a project-based culture. A person has a career or line manager who manages them as a person but does not manage their work. He rents them out to projects and appraises them on feedback from project managers and others.

Think about this from the project manager's perspective. Everyone working on your project team knows that their next appraisal, and maybe pay rise, depends upon what you say about them to their line manager. Do you now have some power and influence over those people? You bet. Some of the project team members might even work for another company - you should have the same arrangement with their line managers.

This implies that at the start of a project stage the project manager must not only agree roles with everyone on the project but must also get their line managers to agree to base

those people's appraisals on his feedback. This implies a lot of up-front work by the project manager. Which in a nutshell is one of the secrets of project success: a lot of up-front work.

Other project roles

One could list a dozen or more further project roles: risk manager, test manager, project accountant, technical architect but since these are special cases of management roles and/or specialist team member roles we will not clutter up the works by listing them though we will allude to some of them subsequently. For example, the test manager gets a mention in the quality management chapter.

[...next](#)

[project management book index](#) [contact us](#) [project management course](#)

[Project Management Book](#)
Copyright M Harding Roberts 2006 2007
www.hraconsulting-ltd.co.uk

Project Management Book

How to manage projects in organisations whose primary business isn't project-based

...chapter 3 continued

Each project is unique: it will require a unique, temporary project organisation. The roles will reflect both the project's needs and the skills and abilities of the people who will fill those roles.

A set of project management rules, if you have such a thing, will say which roles are mandatory (and the only mandatory roles are project sponsor and project manager) and would list the mandatory things each of these roles must do.

The project management guidelines would provide a fuller list of the sorts of things a sponsor and project manager might usually do. The guidelines would also list other possible project roles (project user manager, etc) with a suggested set of responsibilities. The roles and responsibilities that appear in these guidelines would be very much tailored to the sorts of projects your company does. The guidelines do not tell you how to organise your project, they provide a starting point, samples to help you work out what's appropriate for your project. You might decide that one person should take on the roles of project manager and project user manager - but if you do, that person in principle gets both lists of responsibilities to perform, not one or the other. You might want to invent a completely new role because of your project's unique needs. It's up to you if you're the project manager.

Never just assign titles. Saying: "will you be Project User Manager?" may convey nothing about the role to the listener. A good technique is to discuss with the person what you'd like them to do and then get them to write down their own role description (one side of A4 max) and replay it to you the next day. Then you know whether they've taken it on board or not. (Though you might not want to try this approach with the sponsor.)

One company had a template for their Project Definition Document. It helpfully listed their standard project roles - sponsor, senior customer, senior supplier, project manager, etc with a box beside each role for the name. And what happened? Project managers would write a name in each box and that was project roles taken care of. No thought about whether a role was *needed* or not, no discussion with the person concerned. Madness!

There will be disputes during the project. For example, if the users feel their legitimate requirements are being ignored by the project user manager they must have the right of appeal to the project manager and, if they're still not happy, to their member of the

project steering committee. If they can't decide, the sponsor makes a decision (toss a coin if necessary). All escalations to the steering committee should be accompanied by a recommended resolution from the project manager. Escalation paths need to be clear at the outset.

It's a good idea to take a photo of every member of the project team and arrange them hierarchically on a wall (and/or intranet site) showing each person's title so that anyone can see at a glance who's who, who does what and who reports to whom. This can also engender a feeling of belonging, even pride in being part of the project team.

Very small projects, very large projects

In the smallest project there are two people on the project organisation chart: the sponsor and the person who will manage and do all the work.

Slightly bigger, and we have a sponsor, a project manager (who won't spend all his time project managing) and below him a team of two or three people.

Up again, and we have something approaching our example organisation chart but, say, with one person acting both as project manager and project user manager, no IT project manager and an IT team leader managing the IT activities.

Up again and we have something akin to our chart, with one or more team leaders, which might imply a total team size of twenty or so.

Up again and under the project manager we might have a project IT manager, project user manager, quality manager, test manager, architecture manager, procurement manager and others, all reporting to the project manager.

Then we get into projects that are really collections of projects. So the head man might be called project director and under him a project manager for the (sub) project to develop the new order handling system, a project manager for the (sub) project to develop the new invoicing system, a project manager for the hardware (sub) project, etc. And some of the (sub) projects might be in-house, some outsourced and some may be hybrids with both in-house (say users) and outsourced (say IT) elements - and a well staffed project office doing their best to make sure everything is well organised. Quite a big task for the project director to sort that all out before the project/ programme begins.

Clearly, you can't just lift a universal organisation chart and set of roles from a book of standards and adopt it as is.

So:

- design a project organisation that matches your project's needs

- ensure everyone from sponsor on down has a clearly defined role with no gaps or overlaps
- talk to each person, agree their responsibilities, get them to write it down and check back with you
- get line managers to commit resources and agree to take your input into those people's appraisals
- never just assign titles!

How to spot a good project

Ask the sponsor who is in charge. Without hesitation he will say he is. If it all goes wrong his job is on the line; he is the ultimate can carrier.

Ask the same question of the project manager and he will say the buck stops with him - the sponsor is just a figurehead.

If the project manager is a business person, the project IT manager will scoff and say that actually he, the project IT manager, is really running the project - what does the PM know about IT anyway?

Speak to the project user manager and he will tell you he is the lynchpin, the key determinant of project success: if the requirements are wrong we're all wasting our time!

The team leaders will tell you that actually they are running the project - doing all the detailed planning and tracking and getting the team members to do the work. (And by the way they probably are running the project.)

And what will the team members say? "We've no idea what all those people up there are doing - we're the only ones doing any real work, project success is obviously all down to us."

That is a very good sign. Everyone felt they were it, they were responsible, success depended upon them.

Contrast that with the opposite. Ask anyone who is responsible and they will say "not me!" and point to someone else and say "it's him". That's a worrying sign.

Whose job is it to make everyone feel responsible and accountable for project success? You've guessed it, our friend the project manager.

"We trained hard, but it seemed that every time we were beginning to form up into teams we would be reorganized... I was to learn later in life that we meet any new situation by reorganizing, and a wonderful method it can be for creating the illusion of

progress while producing confusion, inefficiency and demoralisation."

Often attributed to Petronius Arbiter (c.27BC-66AD) but actually written by Charlton Ogburn Jr. in 1957.

Please click here to go to **[Project Management Book Chapter 4](#)**

[project management book index](#) [contact us](#) [project management course](#)

[Project Management Book](#)
Copyright M Harding Roberts 2006 2007
www.hraconsulting-ltd.co.uk

