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Applying These Ideas In Your World

*Man with open mouth must wait long time
for roast duck to fly in.*

—Chinese proverb

Exploring a Dozen Dynamic Directions

You've now seen how Strategic Project Management equips you to evolve your project from messy beginnings to a polished plan. Now, what will you do with what you have learned? The potential applications are virtually limitless. Ken Howell, a Sony Electronics champion of this method says, "Show me something that this *doesn't* apply to."

Begin with the issues currently on your plate. Scan your internal environment; look for "hot-button" topics and start there. Be opportunistic and apply it bountifully.

If you read this book with a specific current or upcoming project in mind, you may be eager to get started. Do it! Get your team together. Follow the Application Steps at the ends of Chapters 5 through 8 and you'll end up with an insightful plan.

Because the underlying systems thinking concepts are so flexible, the LogFrame Approach can guide you in many different directions. The Appendix includes brief client case studies accompanied by project LogFrames for the first seven of these one dozen high-payoff, dynamic applications that my clients have put to work. More possibilities may come to mind as you read these.

1. *Develop or Update the Strategic Plan.* This thinking method supports a broader strategic planning process that is critical to any organization. Regardless of the context in which you operate, at least on an annual basis, it is wise to review and redefine your portfolio of strategic projects. Prioritize them and create LogFrame plans for the most essential ones. The case study in the Appendix shows how the Safety and Security Division of Lawrence Livermore National Laboratory did just that.
2. *Strengthen Teams Across Work Functions.* The LogFrame helps bring together a new, diverse team and reduce the stovepipe or silo problem. The four simple questions and logical matrix provide a common vocabulary and structure to work smoothly across organizational boundaries. This case study shows how ARINC, an Annapolis systems engineering company, used this tool to unite executive level task forces.
3. *Reinvent Your Department.* From time to time, take a fresh look at where you are and where you need to go, and then develop strategies to get there. When performance lags or your mission changes, this becomes a necessity. In this case study, the Facilities Maintenance Unit at the Los Alamos National Laboratory aimed for nothing less than a total transformation to meet growing customer demands.
4. *Develop Information Technology Solutions and Algorithms.* The LogFrame offers a general purpose analytic tool that helps structure algorithms of every sort and integrates technology solutions into core processes. Our case study example, from the U.S. Department of Energy, illustrates the design of an anomaly tracking system supporting the annual certification of nuclear stockpile reliability.
5. *Design and Launch Marketing or Sales Initiatives.* Flesh out initiatives that support strategic sales and marketing plans. This case study describes how an Asian international joint venture

planned to expand sales of a cancer-treating medical supplement in the provincial areas of Thailand.

6. *Focus On People.* Bringing a major project to an end requires not only wrapping up the documentation but helping team members transition to new situations. Forward-thinking leaders at the Washington State Department of Transportation organized this close-out for a major bridge project in a way that met all federal and state contract requirements and helped all project staff secure new positions.
7. *Improve Critical Processes.* Identify and harvest the low-hanging fruit, where a modest process improvement effort yields big returns. The LogFrame can be put to work to analyze and redesign any process or organization that needs an overhaul unit, as the Appendix LogFrame from our Chapter 4 GIS case study shows.
8. *Develop Recommendations and Make Decisions.* Use this tool to be systematic and transparent about how to set decision criteria, identify alternatives, collect information, conduct analyses, and make decision recommendations.
9. *Handle Emergent Issues.* Got a hot potato? This approach works well on non-standard projects that arise suddenly and demand quick solution roadmaps. Bake your project potato with proven recipes by defining your problem or issue, converting it into Objectives, and structuring the solution hypothesis. Get cooking!
10. *Unstick Stuck Stuff.* Take a fresh look at stalled projects, programs, and strategies; identify and evaluate alternatives; and redirect your efforts along promising directions. Use LogFrames at any project phase to plan and execute current and future phases. Break loose from stale thinking by brainstorming fresh Purpose statements and see what new possibilities emerge.
11. *Structure Project Evaluations.* The LogFrame can be used to organize evaluations of ongoing projects in the portfolio as well as completed projects. The LogFrame Purpose will describe the evaluation intent, while the Outcomes will identify the various analytic and information chunks you need to make informed decisions.
12. *Organize Learning and Development.* This tool works well to sharpen learning and development programs of all types. Purpose describes desired behavior change; Goal highlights the expected benefits; and Outcomes define the learning delivery

system. Progressive teams use this tool to identify and develop the competencies required now and in the future. What new skills or cross-training does your team need?

Try as I might, whittling the possibilities down to an even dozen was difficult. Here are two bonus applications beyond this dynamic dozen.

13. *Take a High Level First-Cut.* Planning a research program to find intelligent life on Mars? Purchasing a remote island and starting your own country? Use the LogFrame as a front-end tool for high-level scoping of super-sized projects.
14. *Adjunct for Outside-the-Box Projects.* If your organization has a formal project development system, this approach offers a practical adjunct. For example, Procter & Gamble has a superb new product development system, but their system is not suited to handle initiatives such as developing excellent teamwork, fostering a culture of excellence, or shifting corporate directions. The LogFrame offers a fresh perspective for just about anything that doesn't fit your organization's standard project management methodology.

Terry's Tips for Doing the Project RAP (Rapid Action Planning)

The best way to harness the minds and hearts of key people and design a great project is through a well-structured "RAP" (Rapid Action Planning) workshop. In these focused planning workshops, the core team (plus other major stakeholders) carves out a plan of attack using the LogFrame to guide the conversation and document the results. This gets you going on the right track, even if some details are still hazy. RAP events follow custom-designed agendas that fit the project context, and are often professionally facilitated.

How long does this take? It all depends. A small or medium project might take half-a-day to two days to sketch out sufficiently, and even large initiatives can be 80 percent planned after two or three days of continuous or intermittent planning. Large projects do not necessarily require longer initial planning time because core

segments can usually be broken off and begun while planning continues in an ongoing parallel effort.

But don't short-change your upfront planning or you'll pay for it later. Remember NASA Rule #15 and Remers Rule of 10. You can save a lot of time, money and headaches by doing the initial planning right.

The quick formula for a successful team RAP session is summarized here with these five tips.

Tip #1. Invite the Key Players

Who are your core team members? These are the people you absolutely want there. You can also invite your high-level champions for the entire session, or just to kick it off by sharing their expectations at the session start. They can also join in at the end of the session to review the draft design, offer comments, and learn what is expected from them.

Make sure that everyone on the team has read this book and is familiar with these tools beforehand, or be prepared to spend some time educating them yourself. Having a common framework and planning language will harmonize your team and accelerate forward progress.

Tip #2. Use a Skilled Process Facilitator

The key word in process facilitator is *process*. A skilled facilitator makes all the difference in the world. You know from personal experience how difficult it is to be a competent project manager. Well, it's even more difficult to be a competent project manager and a good facilitator at the same time. While exceptions exist, people who try to fill both roles usually end up doing both poorly.

For major projects, bring in a neutral, but skilled facilitator who is outside the project system to guide the RAP sessions. This could be an external consultant or an internal facilitator (check with Human Resources). Seasoned facilitators do not feel threatened if they are required to ask hard questions, point out gaps, or bring a rambling discussion back on track. Their expertise at moving meetings forward productively makes them a smart investment.

Of course, you may not have the option of using an external facilitator, so I've included some guidelines for flying solo later in the chapter.

Tip #3. Set up the Room for Productive Results

Meeting room setups dramatically affect the quality of your process and results. Your group will generate a lot of information, which you want to rapidly capture and plug in when and where it's needed.

Consider how to arrange the room for maximum interaction and idea capture. Keep information visible to all during the process. Have a flip-chart pad (or several), plenty of marking pens, and masking tape to paste up pages on the walls. Post key ideas where all can see, add to, and own their ideas.

The best results occur when everyone can see their ideas being plugged into a large LogFrame grid. For this reason, work from a large whiteboard or blackboard on which you sketch a LogFrame grid. (See the Appendix resource section for a large laminated, reusable LogFrame grid that's ideal for team use.) Another option is to link a computer to an LCD projector and display the LogFrame grid as a work in progress.

Make a large LogFrame visible to all invites collaborative teamwork. The least effective way is to write responses on a pad of paper where only one person can see them. Also, avoid having only one person keep notes of the LogFrame on a personal notebook or computer while everyone else sits around a table. The energy of putting the LogFrame together as a team visibly multiplies enthusiasm and builds shared commitment.

When team members are dispersed remotely and face-to-face meetings aren't practical, find ways to work collaboratively using on-line technology.

Tip #4. Follow the Strategic Questions and LogFrame Structure

The Four Critical Strategic Questions offer a user-friendly, jargon-free way to get the group started. Go deeper with the detailed trigger questions found in Chapter 4 to coax out the issues and fine-tune the project design.

As the discussion proceeds, listen very carefully. Without necessarily using the LogFrame terminology, people will describe Objectives, Measures, and Assumptions. Your task is to plug their ideas into the LogFrame structure and populate the grid.

Periodically test for consensus, beginning with the vertical logic (Goal, Purpose, and Outcomes). Once this is in place, you may proceed to Measures, then Assumptions. This is iterative planning

that will benefit from adjustments and refinements as the RAP session proceeds.

Tip #5. Capture the Results

At the start, have the team decide how they will record the information they generate. Draft somebody with a laptop to capture and circulate the end results. Better yet, assign one or more people the task of writing up the final results. Having two sets of eyes working on any document ensures greater accuracy and more thorough information capture.

Lots of other ideas will come up too that are not immediately germane. Note this on a “bin list” posted on the wall. Don’t allow your effort to become sidetracked or derailed by getting off the topic.

You can also capture flip-chart sheets and work products pasted to the wall with a high-resolution digital camera, and transcribe them later.

Facilitating by Yourself

Like an orchestra conductor, when you facilitate, you do not play an instrument. Rather, you wield the baton and bring the individual musicians’ best skills into harmony to produce satisfying music.

There may be times when you’ll have more technical expertise than the group members, but do not be overly directive in steering them toward any single approach. Let them own it too. Your role is to build from the ideas of the whole group, not supply all of the right answers. If you want to make substantive comments, call time-out and let the group know you are stepping out of your process facilitation role for a moment to make your subject matter comment, and then return to that role.

Experience shows that a good design, developed and supported by the team, has a much better chance of success than a perfect design developed by a project manager (or external consultant) with only minor team involvement.

The Four Critical Strategic Questions are your primary tool for steering the group. Ask lots of related questions and work their answers into the LogFrame cells. You will often need to read between the lines to interpret and supportively restate their responses before plugging them into the matrix.

Skilled facilitators often use flip-charts to capture raw ideas and move selected information into a LogFrame grid as the evolving discussion makes it apparent where all the information fits. This technique allows you to incorporate all of the good ideas while diplomatically ignoring those that do not fit.

Team comments will often reveal a clear project approach, but you may need to sharpen their thinking.

- Suggest different phraseology. For example, you may say, “By the phrase ‘Make it work better,’ do you mean ‘Improve system operations?’”
- Point out and test project linkages. You can increase confidence in the strategic hypothesis by showing how things fit together using LogFrame logic.
- Integrate comments made by various members. For example, “John said the project Objective is to ‘Deploy the new product,’ and Bill said the Objective is to ‘Increase market share.’ Does it make sense that, if you deploy the new product, you will increase sales, which will increase market share?”

Think not only outside the bar chart but outside the LogFrame itself. While the LogFrame provides focus, don’t let it limit you. Allow and encourage broader discussion about the environment, project context, and critical factors for success.

Taking Strategic Action Now

Now, Are You Strategic?

If my Assumptions are correct, you are!

If you’ve read this book mindfully, you’re well on your way. And, if you’ve applied the concepts and tools by following the Application Tips (or plan to do so soon), you’re even further down the path.

The upfront investment of time and energy you make in mastering these concepts will pay handsome dividends again and again in delivering successful projects while saving time, money, and frustration. Keep the book handy, reread it often, and consult the references in the Appendix.

Remember that developing the LogFrame is a *process*, which is more important than the resulting project plan that documents your rigorous thinking process. The finished products offer a *Means of Verification* that you've tackled the right questions and followed a quality planning process where all involved should truly understand *why* they are doing the project, as well as the *how, who, what* and *when*.

Putting a brief LogFrame document in the hands of key stakeholders and executive team members will keep everyone focused and on-path. The ultimate value from using The LogFrame approach, however, is that it changes how you and your team think, plan, act, and assess in order to turn your project ideas into spectacular successes.

I strongly encourage you to commit to doing at least one LogFrame—on any topic—within the next week. Research shows that retention of newly learned skills increases dramatically when practiced soon after initial exposure. Maximize the payoff from your investment in reading this book by applying the information quickly, while it is still fresh in your mind.

Keep your first LogFrame simple. Avoid trying to make it great or perfect—instead, just get the first version done. Review it with the self-scoring checklist in the Appendix. Then, make it better step by step.

By mastering these ideas, you'll upgrade your effectiveness and reap long-term benefits, no matter what field you're in. I'd love to hear about how you are using this approach to gain the strategic edge in your work and life.

My ultimate aim in writing this book was to give you the ideas and inspiration you need to be more effective. As I mentioned at the end of the Introduction, Strategic Project Management helps you think smarter, move faster, and accomplish ambitious Objectives more quickly. People who can do that are a rare breed—and now, you are one of them.

