



## **ARCHITECTING PROJECT MANAGEMENT**

for Enterprise Agility...

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### **Mixed Shore Attitudes- Setting the tone for Agility**

Organization Design for Enterprise Agility

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Author: Mr. Prashanth Balakrishna

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## ABSTRACT

Projects span organizational and geographical boundaries today. Mission critical projects are being delivered end-to-end using Mixed-Shore teams. While the general tenets of project planning are a good starting point for planning global delivery, special considerations are needed for Mixed-Shore teams. With Mixed-Shore teams, Agility goes hand-in-hand with collaboration. People are a key element, and their attitude are key ingredient of success.

During planning, PMs focus on identifying the technical skills needed within team but rarely think of attitudes and mind-set that are needed on both shores. Coaching the team during execution, and hoping for a smooth collaboration is not a right mitigation strategy. The objective of this paper is to provide a framework based on successful experiences in delivering Global Projects. The premise is that a PM can 'plan for right mind-set' by engaging the stakeholders to set up

- Guiding Principles which drive the overall team dynamics
- Ground Rules which drive daily collaboration

This paper provides a framework that outlines the planning steps that a PM can adopt to build the guiding principles and ground rules that are uniquely suited for the Project. With the above guiding principles and ground rules, PM can 'Set the tone' for the Mixed-Shore Team and guide the team to success.

## INTRODUCTION

Attitude of teams play an important role in agility, especially in Mixed-Shore projects. Without a right framework teams quickly get into '*us and them*' thinking — they group their colleagues across the shores into categories rather than see them as individuals<sup>[3]</sup>. Geographical separation, time zone challenges, working styles and cultural differences play into team dynamics and impact agility.

Working at a distance is complicated because it affects the way teams feel and think. If the team members across the shores do not have the right attitude, collaboration loses ground and agility suffers. Project managers who don't take proactive steps, miss a great opportunity to lay a good foundation, build trust, and create high performing Mixed-Shore team.

We will explore two case studies which demonstrate how attitudes influenced collaboration, and determined the success of the project. In the first case, there was no early intervention to fix a dysfunctional team resulting financial impact and delayed time to market. The second case demonstrates how deliberate proactive steps, instilled a great attitude within the team, fostered trust and achieved agility.

These two contrasting case studies, have led us to derive a few guiding principles and ground-rules that can be established to ensure great collaboration, and consequently agility for the project. These guiding principles and ground rules have been inserted into the Project Management Framework, providing anchor points for the project manager.

## DETAILS OF THE PAPER

During 2014-15 we executed two projects that had similar objectives i.e. to reduce IT application development costs by using Mixed-Shore teams. Maintaining agility and quality was imperative while reducing costs. The way these two projects were set up was contrasting. One project began in a chaotic fashion with no proactive steps to fix a dysfunctional team. Large amount of project management and leadership effort was spent to course correct. The other project team took several proactive steps through early intervention and attained great collaboration and agility. In both these cases the contrasting nature of the team attitude was a major factor in determining agility.

### Roadblocks to Agility

When we started a new project with a Health Services firm in the US, our brief was to provide a cost effective and predictable delivery for their health services platform that was implemented across US. This platform was maintained using internal IT staff as well as on-site consultants. The platform needed continuous technical upgrades to meet the market needs and comply to government policies.

Since we had to keep the development costs low we put together an India based offshore team comprising of analysts, developers and QA engineers to collaborate with the client's IT staff in the US. The offshore team had to work like an extension of the client's IT team. This Mixed-Shore team had to deliver the necessary enhancements and upgrades to the platform. The pressure to get going and deliver tangible results was so strong that the project team was told to get started and figure things out as they moved along. The teams in US and India were not really prepared for collaboration and were unaware of the business drivers that necessitated a Mixed-Shore approach. This resulted in several challenges that impacted collaboration and impacted agility.

As part of improving collaboration, we captured the various complaints that came from both shores and categorized them. We found that over 70% of the problems were related attitudes of the team members which resulted in daily conflicts and created a dysfunctional team as depicted in illustration1.

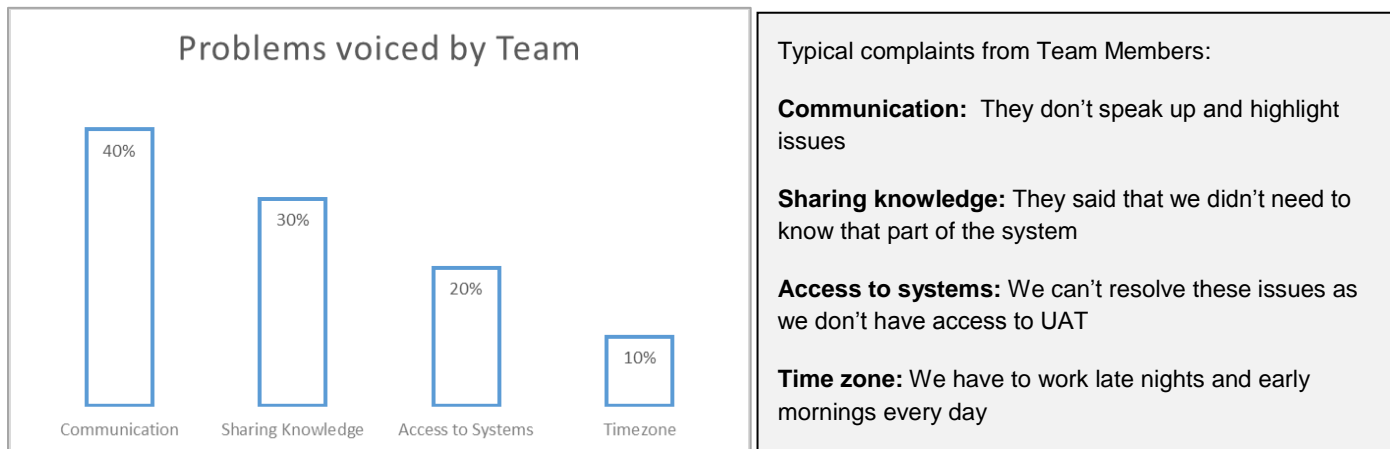


Illustration 1: Problems voiced by Team

## Reactive Measures

With these daily conflicts taking a toll on agility, all the phases of the project started showing negative trends. As the teams could not resolve conflicts themselves, senior managers had to step in to understand the issues and fix the situation. Several measures were put in place to bring the project back on track.

**Travel of Key Personnel:** Travel was an expensive way to fix the problem, Key team members were identified and were sent to other locations to spend time with their counterparts and work in a collocated environment.

**Redesign of Collaboration model:** We redesigned the collaboration model. Hand off mechanisms were redefined and all the team members were made to write extensive documentation, and get approvals before system changes were implemented.

**Playing Referee:** Senior managers started joining daily calls to moderate between the teams, resolve conflicts, and move things forward. Their intervention was to get the team to focus on commonalities<sup>[3]</sup>, and reduce the 'us and them' thinking. Managers reinforced the shared objectives had open discussions around the question: *Why are we working across geographies?* They reminded the team why it was necessary to collaborate with colleagues at another location and help the team recognize interdependence in reaching objectives.

**Disciplined use of tools:** We realized that the information asymmetries that existed in the two locations heightened the differences between locations<sup>[3]</sup>. We coached the team to use collaboration tools that managed the development lifecycle. This brought in transparency to work allocation, and the management was able to get an accurate status of the progress of the project.

**Executive Messaging:** For some team members who were resistant to change even after continuous feedback there was a subtle messaging from senior executives. The team members had to understand the message "If you do not change, you can become extinct" [1]. This was an extreme step, that had to be taken when the team dysfunction brought the project to a standstill.

With these changes, the project came limping back on track, but time to market was severely impacted. The first 3 releases of the platform were delayed by month each and the product release slipped over a quarter. The client had to pay liquidated damages for delayed release of critical changes to the platform.

## Design for Collaboration

The second project that we executed with a financial services provider progressed in a contrasting manner. In this project the sponsor gave us a free hand to set up the Mixed-Shore team. We were given the leeway to design the model that facilitated collaboration within the Mixed-Shore team. The proactive steps we took to achieve agility involved cultural training, org structure changes, and symmetrizing the information across the shores through collaboration tools. These proactive initiatives were supported by the sponsor and client's executive team.

**Collaboration Bootcamp:** We highlighted to the client that there are differences in how people from various cultures approach project work and getting things done. These divergences in fundamental mindset needed to be understood, appreciated and negotiated on a daily basis [2]. With support from the sponsor, we instituted an intercultural skills program called "The Cultural Detective®" which was fun, and simple intercultural tool that maximized learning on intercultural scenarios. Teams on both sides were also coached on the Lewis Model [4], which helped the teams understand how to interact with people from different cultures, See illustration 2.

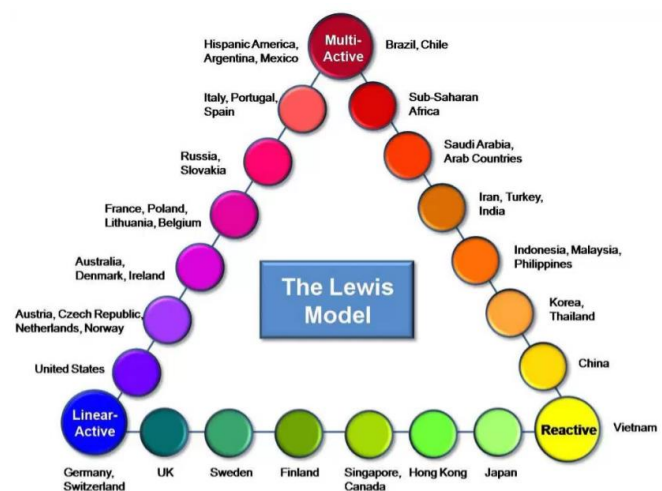


Illustration 2: The Lewis Model

These trainings helped the team members understand communication styles, and most importantly the values and beliefs of their counterparts across the shore.

**Lifecycle Management Tools:** We instituted a transparent system that gave both the shores a true picture of the project status as well as work allocation on a daily basis. The lifecycle management tool was implemented on Day1 and disciplined usage of the tool was promoted throughout the project.

**Empowering Expertise:** We took the approach of empowering key team members to call the shots regardless of location. Leadership was based on expertise and not location. We also changed the mix of team and ensured that the leads with specific expertise had more collocated team members. This led to a coagulation of expertise at certain locations and team productivity improved.

### Improved Time to Market

The systems we put in place to improve collaboration and measure velocity started showing us encouraging results. The additional time spent on the collaboration boot-camp paid off right in the very first release. The team adjusted to the working styles of other-shore faster and was able to achieve good velocity. As the releases progressed, the collaboration worked like a well-oiled machine and the last release of the year was completed in a record time achieving 28% faster time to market with high quality, see illustration 3. Team bonding across shored increased leading to high motivation.

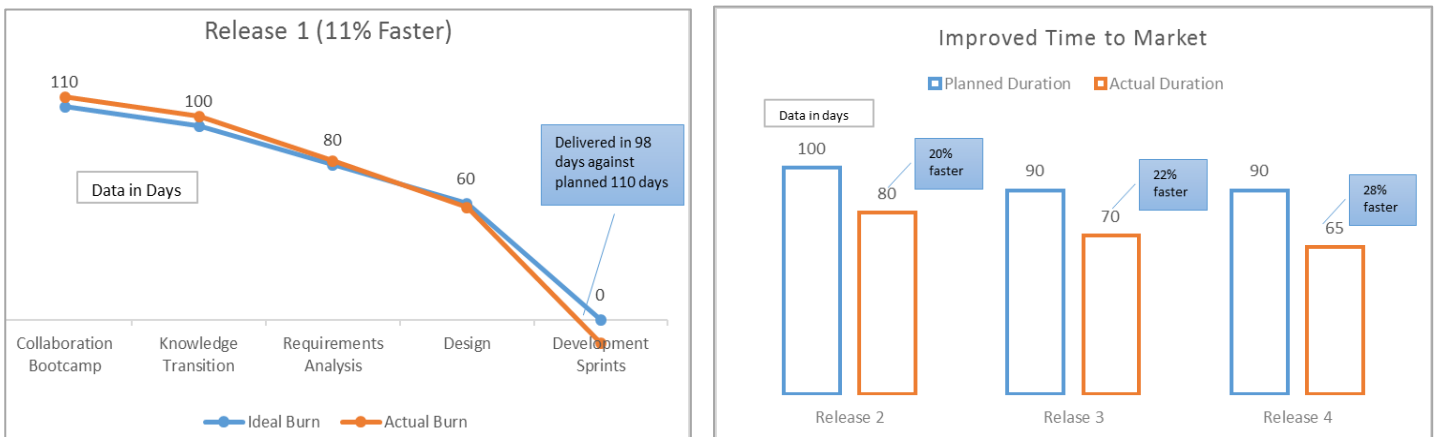


Illustration 3: Release Performance



## Setting the Tone for Agility

The two projects provided us with a lot of learnings which we could incorporate into a framework for the benefit of future projects. We built a project handbook that guided the PM through the key proactive steps needed to setup the Mixed-Shore projects for success. These steps are inserted into the Initiation, Planning and Executing phases of the project. These insights are depicted in Illustration 4

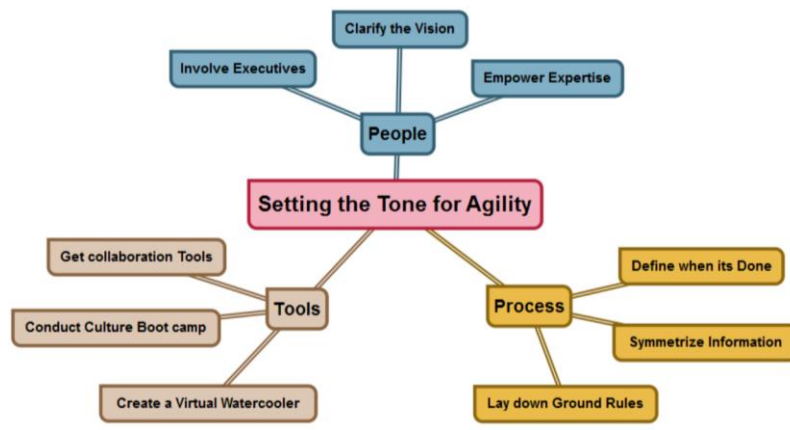


Illustration 4: A framework for Collaboration and agility

### Initiating:

**Ensure Executive Involvement:** Mixed-Shore projects cannot succeed without the senior executives setting a clear measures of the success for the project. The PM has to ensure that he gets time commitment from the senior executives to engage with the teams upfront.

**Clarify the Vision:** The PM needs to understand the question “Why are we working across geographies?”. The PM needs to remind the team at all times why we have a Mixed-Shore team – whether it is to better serve global clients, to provide a more complete solution, to leverage dispersed knowledge, or a combination of the above <sup>[3]</sup>

### Planning:

**Empower Expertise through Org Structure:** Understanding the team expertise and deciding what type of work will be done in which location is a key decision point. By empowering the experts regardless of the location will help in team productivity and time to market.



**Definition of Done:** Clear definitions of hand-off's and definition of done is needed at the planning stage to avoid confusion during execution

**Acquire Collaboration Tools:** This is an investment that will go a long way in achieving transparency. The most efficient way to understand the true status of task allocation, task burn and overall progress of the Mixed-Shore team is through a common tool.

## Executing:

**Conduct a Culture Bootcamp:** Teams on both shores need to train on the Lewis Model and understand national norms. Reactions of teams in remote locations can be forecasted, justified and managed effectively.

**Symmetrize Information:** Information asymmetries between the two shores is a constant source of conflict. Collaboration tools help in achieving transparency. However, there is discipline needed to ensure the tools are up to date with accurate information and accessible to both shores.

**Lay down ground rules:** Ground rules are more tactical in nature are essential for the execution phase. Ground rules can be around any of the issues but the three key rules that we found absolutely essential are

- Assuming positive intent: When people across the shore did something out the way, our ground rules stated that the other team had to assume good intent. This went a long way in resolving routine conflicts
- Disciplined tracking of tasks: Daily task burning, daily builds and daily stand ups need to be enforced as this helps in achieving transparency between teams. The collaboration tool had the latest daily updates and progress was visible to everyone
- Collaboration timings: Strict enforcing of collaboration timings ensures that teams on both shores are dedicating time to talk to each other and sync up.

**Create a virtual watercooler:** While collaborating with other shore colleagues, teams lack the Information about the daily lives of their colleagues which is easily available when you are collocated. This created what is called a 'mutual knowledge' problem <sup>[5]</sup>. Daily situations (Long commutes, personal situations, illness) affect work and distant colleagues will not be able to sympathize thereby losing the bonding opportunities. Creating a virtual watercooler of sorts will help in bridging the gap. Travel to other location is ideal if there is budget and time, but in the absence of travel PM's must make an effort to create forums where daily life is shared to create a bond between teams.

These guidelines fall into people, process and tools categories and serve as anchors for a PM. If these guidelines are built into project handbooks the help PM's in dealing with team dysfunction proactively and attain agility.

## CONCLUSION

Mixed-Shore teams are becoming a norm today, and the geographical separation brings with it a host of issues. Team attitudes and disposition towards each other, especially across cultures will severely impact collaboration. If not addressed early the 'us and them' syndrome creeps in and create dysfunction. Most of the time, attitude is considered a 'softer aspect' and PM's try to coach the team through conflict situations as they happen. When team's get into a dysfunctional state it is harder to get them out the cycle. Collaboration suffers and agility is impacted. Proactive measures like Culture Training, Symmetrizing Information across shores, Instituting collaboration tools, and tailored organization structure will prevent team dysfunction, set the tone for agility and set the team up for success.

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