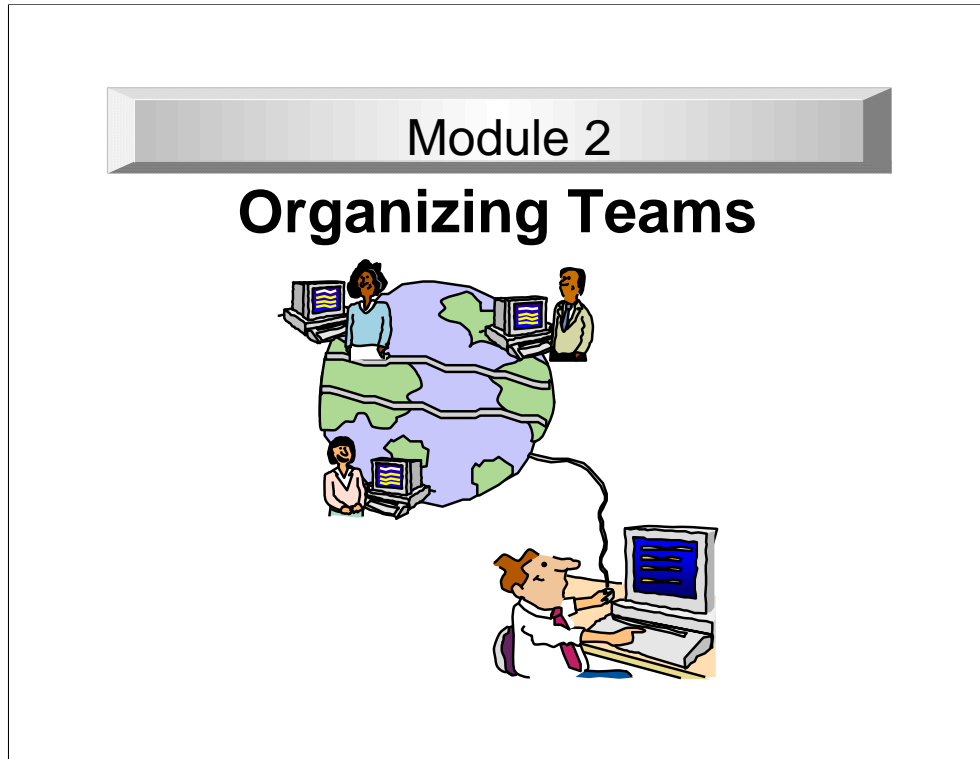# Module 2
Organizing Teams

Before starting Module 2 explain to the participants that they have 2 books. The PMF Learning Log is a reference guide. This books contains most of the key material from PMO and PMF. They should reference it as they proceed through the course. At the end of each module in the Learning Log there is a page that says Course Notes. They should use those pages to document any notes.

The Case Study book Module 2 contains the case study materials that the students will need for the exercises.

This module refers to pages 9-18 in the Learning Log.
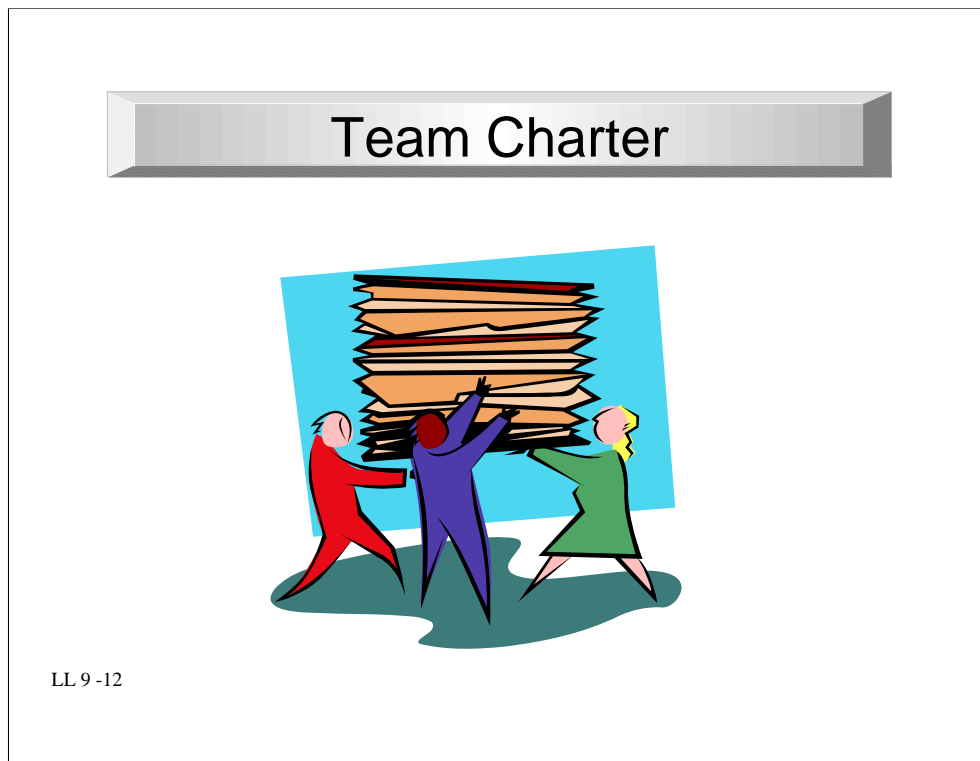
Objective of This Module

Using the documents provided, teams will assign case study roles to each participant, assign a project manager for each activity, and assign an observer to observe the team as they develop a team charter that contains a set of rules that all team members agree to follow while working on the project. This team charter has been tailored for the classroom.

Module 2 Timing

This module lasts for 1 hour and 30 minutes, 13:00 – 14:30, day 1. The agenda is:

Start	End	Length	Subject
13:00	13:20	20	Organizing Teams Discussion
13:20	13:40	20	Seven Keys Discussion
13:40	14:10	30	Exercise Team Charter
14:10	14:30	20	Debrief and Feedback
14:30	14:45	15	Break

Team Charter

LL 9 -12

Note to the Participants:
Notice on the slide on the bottom left corner there is a notation LL 9-12. This means that the material we are discussing can be found in the Learning Log on pages 9 -12.

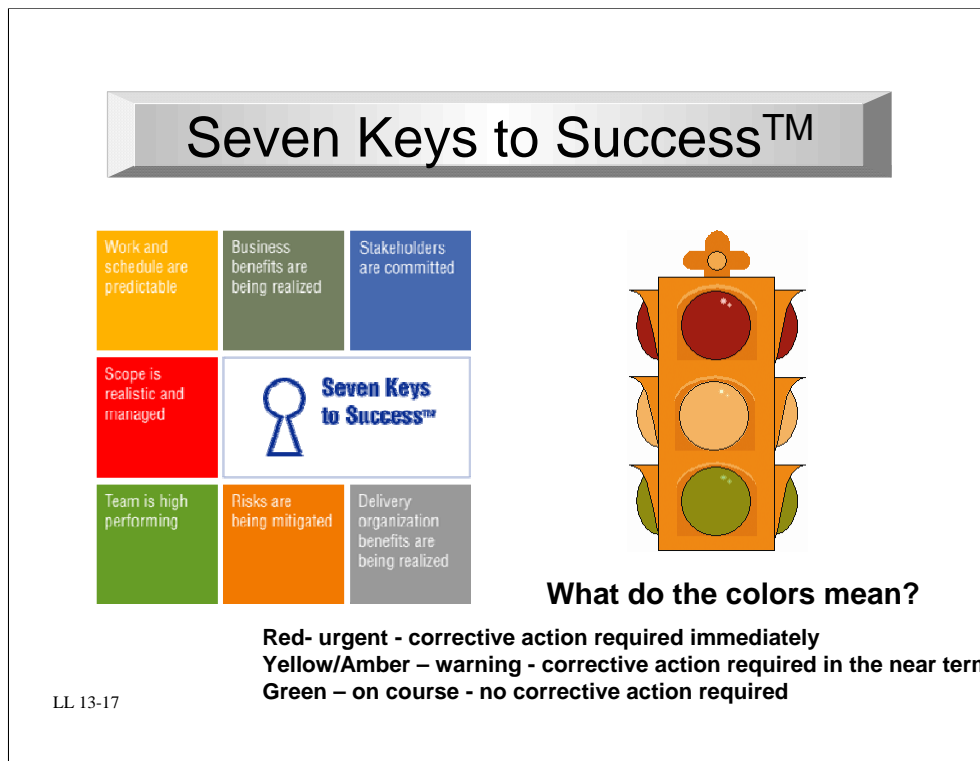**Create a flip chart "Forming a Project Team"**

Taking from PMO, the bridge game, and other experience we have, when you receive a new assignment as a PM and show up at the new project location along with a new set of team members, what do you need to do to establish a "team" out of a group of people getting together for the first time?

Record participant responses on flip chart.

WWPMM defines Project Team as "The team responsible for the project , led by the project manager . The team may include members from different functions and/or internal or external suppliers."
There are two critical parts to this definition. First "the team", who is and is not on the team, an idea of who will be expected to do what, and how the team will operate. Second, "the project", the purpose for our team, which might be one aspect of a larger project.

The challenge of this module, is to design, build and deploy the team. WWPMM suggests we create a "Team Charter", which is described in the Learning Log on page 10. Take 1 minute to look at that and let me know if we need to add anything to our list.

Any questions about the purpose of a Team Charter or creating it? ... Do you think the PM should create the Team Charter to get things moving, or do you think the PM has or should take the time to make this a group effort?

Seven Keys to Success™

Work and schedule are predictable

Business benefits are being realized

Stakeholders are committed

Scope is realistic and managed

Seven Keys to Success™

Team is high performing

Risks are being mitigated

Delivery organization benefits are being realized

What do the colors mean?

Red- urgent - corrective action required immediately
Yellow/Amber – warning - corrective action required in the near term
Green – on course - no corrective action required

LL 13-17

The Seven Keys framework is a very effective tool for assessing and communicating project health. This is a tool that can be used with executives or other stakeholders.

Review each of the keys and explain their meanings. **Refer the students to the learning log pages 13-17.**

Review the meanings of the colors in the traffic light.

Seven's not really a magic number – I can modify the framework and just focus on 5 or 6 keys if I want to.

Real-life project experience shows us that all seven keys are important to the success of any project. Not assertively assessing and staying on top of any of the 7 keys can seriously weaken a project. Taking that thought a step further, as each key goes yellow or red it weakens your project and the probability of serious failure increases. As each additional yellow or red appears it becomes more and more difficult to handle the next problem, until you reach a point that any additional problems or worsening of problems simply overwhelms your project and it collapses. Top performing PMs strive to ensure the best health they can across all the keys. There will almost certainly be a yellow or red from time to time on any project, the issue is not whether it is yellow or red, but whether or not it is identified quickly and resolved. Underperforming PMs invariably have a key or two that they don't pursue well, and they go yellow or red early in their projects on those keys, and they never take sufficient corrective action. And those weaknesses drag the other keys down with them. Does that make sense?

The Seven Keys are cumbersome to use – besides, my project is small
Feedback indicates that both large and small projects can benefit from using the Seven Keys – if the project is important enough to do, don't you want it to be successful?

Any questions or comments on the Seven Keys before we move on?

Creating an Organized Team

Purpose: Form and organize a new team and create a Team Charter

Process:
Use Case Study and Team Charter handouts, assign project roles, an observer and a PM, and create Team Charter for case study.

Participation: Identified PM leads effort, others assume roles and support PM, team's choice on who will present products

Products: 1) One flip chart with your Team Charter for the case study
2) Comment on how your team organized itself, what you learned about forming and organizing teams, and how you think you could do better in the future

Set-up Activity

The Case Study Book contains the following documents:
• Case Study 2-1 Suggested Team Members for the World Gymnastics Games Project
• Case study 2-2 Summary of the Statement of Work and the Project Charter
• Team Charter Template
• Project Manager Assessment Form

The teams will appoint case study roles. One of the team members will be assigned as an observer. At the end of the exercise this person will share what they saw with their team during the feedback session.

Prepare a team charter that is agreeable to all team members based on the project charter handout. Team members will confirm their agreement by signing the document.

Give teams 30 minutes to appoint roles and create the team charter. Emphasize that this is a firm time. Give each team 5 minutes total to present their team charter.

Tell students to select a person to present the charter.

Points to Be Aware of in Documents
Note that the organization chart does not show deliverables. It shows only the names of organizations and functional units.

Note that the SOW is incomplete. The SOW mentions two forms of output, scoreboard and printed reports. Be aware that in a later module, two more outputs will be added to the requirements.

Monitor Activity
Watch teams as they go through the normal stages of forming a team. Expect teams to experience typical group growing pains.

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Debrief Activity

Have one team do a presentation of their charter. Ask the teams that do not present to explain what is similar or different in their charter.

During the presentation and discussion, watch and listen for the following:
• Have teams defined their "rules of engagement": how team members are going to work cooperatively, especially when they disagree.
• Have they set time limits on discussions?
• Have they defined a conflict management process?
• Have teams agreed that the project manager is the final authority in disagreements?
• Can team members bring up issues that have been settled previously?
• Have teams set rules of behavior and rules for resolution conflicts?
• Have teams listed points of contact?
• Have teams established administrative guidelines, such as who maintains the Project Control Book, what hours the teams will work during the case study, and when they will work overtime

Explore what the participants learned
• What worked well?
• What are the "Even Better Ifs"?
• What could have contributed to that? (cause and effect)
• What key things did you learn from this exercise?
• What advice would you give someone about to start this exercise?

Explore how the participants can apply the learning
• How does this relate to the real world?
• How might your learning today impact what you do Monday morning?
• How might this change the way you ….?
• What would make dealing with this situation more difficult/easier?
• How might you respond/apply these learnings when/if …?

Team Charter Topics

Some suggested topics:
- Time limit for discussions
- Decision-making process
- How to handle conflict
- How long team works, for example, into lunch, after 5:30
- How team deals with internal issues; for example, dominant or quiet team members
- Assign PM and backup for each module
- Assign roles and responsibilities
- A "Trigger" word to be used to gracefully disengage
- Develop a team name

Reveal this slide once teams have presented, just highlight what might have been missed by those who presented.

The team charter should contain the items listed in the Team Charter Case Study Requirements, which include

- •Time limit for discussions
- •Decision-making process
- •How to handle conflict
- •How long team works into lunch and after 5:30
- •How will team deal with internal issues such as dominant team members or quiet team members
- •Assign PM and backup for each module
- •Assign roles and responsibilities
- •Develop a team name

Team is High Performing

Team is high performing

Healthy Signs
- Morale is good
- The team is diverse
- High energy and enthusiasm for the project

Unhealthy Signs
- The tension can be felt
- Turnover is high
- Working conditions are poor

1. Breadth, depth and caliber of PM and team skills are appropriate for all phases.

2. Morale, motivation, energy, and collaboration across teams are high.

3. Environment and facilities support productive and effective teamwork.

4. Roles and responsibilities are clear.

When we are a part of a high performing team, or see one in action, what can we observe that suggests they are high performing? Record responses on a flip chart. These could include:
- Mission oriented, clear and intense focus on the tasks at hand
- Energy and enthusiasm for being on the team and doing the team's work
- Acknowledgement and appreciation by others of the team's efforts and accomplishments
- Minimal panic or confusion, even when seriously challenged there is a "can do" attitude
- Team members collaboratively support each other beyond just doing their jobs
- Work setting is highly conducive to productivity
- Political or organizational connections or influence
- Deep experience and insights in functions, industries and other topics

Critical to "Team is High Performing" is that it must address not only the overall project staffing and resources, but also those who are responsible for the project management systems, financial management, risk management, management reporting, methods and tools selection and deployment, etc.

This key requires that the project management and governance team be assessed as well as the solution design and delivery team, so the project manager and whomever they report to must also be high performing.

If any of the teams are not high performing, then corrective action is to be considered. If the plans in place and the resources being applied against those plans are sufficient that the teams will be successful, then the Team key is green, stay the course. But if the plans or resources need corrective action, then the Team key is red if the corrective action must be immediate, or amber/yellow if the corrective action need only be in the near term.

It is also important to recognize that PMs should do a regular, at least monthly, assessment of the Team is High Performing key. For many reasons performance may drift favorable or unfavorable, and early detection of unfavorable developments is critical to staying on top of your project. Consider assigning one of your Team Members as the Team Charter owner, and ask them to report in each month regarding any changes that may be needed or any concerns that the team should address. Delegating the upkeep will free up a little of your time and give them a growth opportunity.

Any questions about organizing teams, Project Charters or the Team is High Performing before we leave this module?

Get the teams to think about the following for the Team is High Performing Key::

- The status (Green, Amber, Red)

- The issues behind any Yellow or Red keys

- What actions they could propose to resolve the issues

Ask one team to present back and then invite other groups to contribute if they have any major differences. Make a note of which team has presented back since another team should present back in the next module.

Pay particular attention to the Team key since this is the key addressed in this module.

PM Feedback

After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback.   Document your lessons learned on page 18 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.

After teams have presented their results, give them a few minutes to provide feedback to the participant playing the PM for the activity.

Explain the rules for giving feedback.