

CBPM

PROJECT ACCELERATION THRU COMMITMENT-BASED PROJECT MANAGEMENT – STUDENT GUIDE – 2013 EDITION

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Overview:

Many project teams spend a tremendous amount of time developing a plan and then gathering and reporting status. Wouldn't these projects be completed faster if these facets were done in an accelerated fashion?

Developed at Intel Corporation, Commitment-Based Project Management focuses on what's important: what needs to be completed by when and for whom; securing commitments from the team that they deliver to; and monitoring without micro-managing.

Using "Map Days" to quickly develop a plan that the team owns and commits to, the project manager leads the project through regular, simple, time-effective short reviews that eliminate micromanaging and empower the team to achieve success. Projects successfully applying these techniques tend to complete on time or even early, on budget, with satisfied customers and with less stress than traditional approaches.

What we will cover:

- How do you accelerate a project?
- Quickly build a realistic project plan?
- Align the team so that they pull in the same direction?
- Address intra-team dependencies without having to be a traffic cop?
- Get agreement on the requirements to be met
- Increase the likelihood of achieving project success?
- Have the team buy into the plan and meet the deliverables?
- Monitor progress without micro-managing?

Some Things that go “bump” in the night – Slide 12

Some things that go “bump” in the night (slow projects)

- Lack of stakeholder clarity
 - Lack of scope clarity
 - **Lack of plan clarity**
 - **Lack of execution clarity**
 - **Lack of functionality clarity**
 - Lack of resources
- } CBPM
Realm

CBPM addresses three of the main problem areas for most projects: lack of plan clarity, lack of execution clarity, and lack of functionality clarity. Please note that there are numerous other “lacks” that can delay projects. These (stakeholder, scope, resources, other) are not addressed by CBPM but are addressed by other Project Acceleration Techniques (PATs). However, planning, execution, and functionality clarity are key areas of project management that done well can alleviate the other delays and provide the project manager with the time (and the goodwill due to the great execution) to address the rest.

Discussions on the three other problems are included in the slides in the appendix. For your convenience, we are including them here as well as a brief explanation.

Why it works

- CBPM leverages the group's intelligence to:
 - Develop a rolling-wave achievable plan
 - Owned by the team!
 - Make intelligent commitments
 - Hold each other accountable
 - Expects early warning of issues and mutual help to resolve the issues
 - Communicate with each other
- Empowers the team to manage how they develop their deliverables
- Eliminates the PM as a bottleneck
- Management and tracking are lightweight

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There are numerous reasons why CBPM works. First and foremost, it leverages the entire team to develop a rolling-wave plan, developed over a number of sessions. This approach allows the team's intelligence to be used in the plan development. It gets everyone to understand the overall plan, the importance of the commitments they are making, helping them make intelligent commitments. It helps the team members hold each other accountable (rather than just the PM monitoring). It helps identify and resolve issues, encouraging early identification and notification of issues and expecting the team members to communicate with each other.

Since the commitments can only be made by the "owner" of a deliverable, CBPM empowers the team to define a realistic schedule. In addition, as it makes visible who is the customer of whom, it encourages team members to talk to each other about their deliverables, taking the PM out of the middle of the picture where s/he can be a bottleneck.

Finally, management and tracking of performance is relatively light weight. As it only focuses on deliverables and done/not done status, details such as all of the tasks to complete a deliverable and % complete are eliminated from the discussions. CBPM, while empowering team members to make commitments, holds them accountable to these commitments without micromanaging them.



Overview of the Process (continued)

- Conduct overview session(s) to help members understand the purpose and goals of the project
- Have teams do homework
- Conduct map day(s) to define/refine the plan
 - May need more than one
 - Can serve as kick-off meeting

To conduct the map days, it is a good idea to conduct one or more overview sessions to explain to the team what the purpose and goals of the project are **prior** to the first map day, getting scope clarity. This overview session will help the team members understand what they are being asked to do as well as ask any questions they may have, eliminating this type of questions during the map day.

Prior to each map day, teams must prepare. At a minimum, they should develop a list of deliverables they think they own, a list of deliverables they think they'll need. Include estimated dates as well as intermediate deliverables. Make sure the teams get their homework assignments and complete it. There's an assignment Word document that can be used to let members know of the homework.

At this point, the team is ready to hold its first map day.

Overview of the Process (continued)

- Review progress 3x/week:
 - Conduct regular (weekly) meetings with leads that review progress, issues, etc.
 - Can be group, 1:1, or both
 - Recommend using both
 - Email
- Manage effort through deliverables matrix:
 - Done
 - Late
 - Coming up – set horizon for as many days as desired
 - Need dates
- Items are done or not done. % complete irrelevant
- Customer wins if disagreement with owner
- Conduct additional map days as required

Monitoring is conducted regularly, at least 3 times per week. The suggested approach is as follows:

- Conduct regular reviews with the team
- Conduct regular reviews with the owners during 1:1s or impromptu
- Send emails early in the week requesting status update

Use the deliverables matrix to capture the information and to easily identify **Done**, **Late**, **Coming Up**, and **Missing Date** items. The spreadsheet automatically identifies these (more details later).

Deliverables are either **Done** or **Not Done**. 99.9% done is **Not Done**. If there's a disagreement, the customer of the deliverable wins. The reason for this rule is to encourage owners to talk with their users to reach clear agreements on what the deliverable contains and the date.

Key Slide!!

Follow-up Process (continued)

- PM emphasizes need to communicate
 - Supplier must reach out to customer with updates
 - Customer must reach out to supplier to get information if information not available
 - This is done outside of team meetings
- Progress is constantly monitored and adjustments made
 - PM reviews with leads during team meetings and 1:1s
 - Late items
 - Upcoming items – need to adjust dates?
 - Items with no dates
 - Rule of thumb:
 - No changes to commit dates within two weeks due
 - Exceptions possible
 - Owner of late item must have a recovery plan
 - Customer approves the completion of the deliverable

A key concept of CBPM is that the PM should not be the one in the center of each discussion. The PM must emphasize, if the team doesn't realize it, that suppliers and customers must talk with each other. To help make sure these discussions happen, the Excel spreadsheet (discussed later) has a column to capture if these discussions have taken place. They should be held as needed and not necessarily during team meetings.

Progress is constantly monitored with key items to focus on being:

- Late items – and what's the recovery plan?
- Upcoming items – what's in the horizon? Are we OK? Do we need to adjust?
- Items with no dates – when are these items going to be completed? Constant review is critical as without such review it is possible that an item may be needed before it is planned.

As a rule of thumb, we use 6-8 weeks as the commitment horizon. Everything beyond 6-8 weeks is an estimate. Within the 6-8 weeks, a rule of thumb is that items that are due more than two weeks out can have their commit dates change provided the impact is understood and manageable. Within the two weeks the commit date won't be changed. A new commit date will be captured separately. The goal is to ensure team discipline. Otherwise, if we change items and don't let them go late, the team would be fooling itself.

A key item upon completion of a deliverable is that the customer of the deliverable has final say as to whether it is complete or not. This introduces tension into the system to ensure that the owner, the only one who can commit, clearly understands expectations from the customer.

Deliverables Matrix Example

Deliverable name

Done	0
On Time	12
Late	0
Blank	2

Phase Count

P 1	4
P 2	5
P 3	5
M:1	5

At top

At bottom

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This page, using Exercise 1 (on CD) describes the various columns within the matrix.

- Column A (not shown) is labeled “Swim Lane” and can be used to group items if so desired.
- Item # - can be useful if a Visio map is developed. Since Visio will have less space than the matrix to hold the deliverable description, a number would be helpful to match the two. Be aware that if you sort the matrix that you keep the item numbers constant otherwise you won't be able to match the matrix to the map.
- Deliverables – enter a brief description of the deliverable.
- Priority, Phase, and Predecessor – these are optional columns. The matrix does not use them, although Priority and Phase are populated from lists at the bottom of the matrix. For predecessor you may want to use the Predecessors sheet.
- Owner – the person or team who owns delivering the item.
- Commit Date – when the owner will have the deliverable complete. If more than 6-8 weeks in the future, it should be considered as an estimate not a commitment. If no date is entered, the cell will turn yellow.
- User 1 (and 2 and 3) – These columns capture the person or team that will use the deliverable. Almost all items should have one or more users. If no, question its need. It may be that a person/team thinks it's important enough that it needs to be tracked, in which case the user would be the same as the owner.
- Needed by 1 (and 2 and 3) – the date by when the user(s) needs the deliverable. If the need by date is before the commit date and the item is not done (or late) the cell will turn orange. If late (and not done) the cell will turn red with bold white letters.