LESSONS LEARNED IN PROJECT LEADERSHIP

Project Management is about doing things right. Project Leadership is about doing the right things.

Michael Woore, MBA PMP
AGENDA

- What are the principles of Project Leadership?
- How can I apply my skills for greatest success?
- What “lessons learned” can I implement?
- Please share how you applied these principles
- What skills are currently in highest demand?
- Q & A
WIN Strategy

• What’s
• Important
• Now?
Recipe for Project Success

- Begin with the end in mind
  - Define the business challenge
  - Define the business solution
  - Select a process that fits
- Identify project deliverables
- Be firm with regard to deliverables
- Be flexible with regard to process
Two Rules for Creating Raving Fans

1. Make your business partners happy
2. When there’s a conflict of priorities, see rule #1
IQ & EQ

- **IQ (Intelligence Quotient)**
  - Derived from standardized tests designed to assess intelligence
  - Predictor of educational achievement

- **EQ (Emotional Quotient) / Emotional Intelligence**
  - Ability to assess and control the emotions of oneself and others
  - Self-awareness – Using gut feelings to guide decisions
  - Self-regulation – Adapting to changing circumstances
  - Social skill – Managing relationships
  - Empathy – Considering other people's feelings when making decisions
  - Motivation – Being driven to achieve for the sake of achievement

*Source: Wikipedia*
Perfect Storm Brewing

- 65% of all employees surveyed indicate they are ready to make a job change
- 38% indicated they trust their senior leaders will keep their promises/honor their commitments.
- Lloyds of London identified “talent and skills shortage” as the #2 risk to business success in 2012
- Job satisfaction is at the lowest level in the last 25 years.
- 90% of employees feel they make a valuable contribution, 34% do not feel this work is valued, and 40% do not feel valued as employees
Personality Traits

- Which traits can you harness to become a more effective leader?

- Characteristics of an ENFJ
  - Very perceptive about people's thoughts and motives
  - Motivational, inspirational, brings out the best in others
  - Driven to meet other's needs / “Servant Leader”
  - Place a high value on cooperation
  - Good communication skills – straight-forward, authentic
  - Ability to see the big picture
  - Continually looking for newer and better solutions
  - Most enthusiastic and passionate lovers

Source: Google “ENFJ”
When have you been called upon to be a project leader?

Practical Examples

- Project is six months behind / in danger of losing contract
- Poor customer relationships / PMO & better governance needed
- Process & system changes required / new revenue opportunity
- Acquired ERP in foreign territory / scalability for growth
- 5th person assigned to the job / succeed where others failed
- Fighting between business units / lack of common vision
- No idea what’s going on / how do we get the product out the door?

Are these primarily people, process, or technology challenges?
Lessons Learned

▪ **From Theme Park Operations**
  • The importance of MBWA
  • Attitude is everything
  • The customer pays for your paycheck

▪ **From Restaurant Operations**
  • Teamwork is essential
  • The paradigm of ownership
  • Inspect what you expect

▪ **From Physical Distribution Operations**
  • Focus on “The Goal”
  • Bring out the best in others
  • Know your business and innovate it
Background

- Largest 3PL for Home Entertainment with operations spanning 9M+ sq. ft.
- Capacity to manufacture 2B units per year, distribute 6M consumer packaged goods per day to 40K destinations and process daily returns of 1.4M units
- Clients included Disney, NBC Universal, Paramount, Warner Bros., Microsoft, Activision, Electronic Arts, Capcom, THQ, etc.
- Retailers included Walmart, Amazon, Costco, Netflix, Kmart, Target, Best Buy
The Problem

Demand Exceeded Capacity in the 4th Quarter 2010
We can increase revenue and customer satisfaction in 4Q2011 by more effectively balancing supply & demand.
Identify, select, and implement a sales and operations planning (S&OP) solution that facilitates entry of client retail forecasts, maps SKUs to required manufacturing, packaging, and distribution processes, and provides the ability to proactively balance supply and demand across 38 North American production centers accountable for producing $1.8 billion dollars of annual revenue.
Required Solution Capabilities

1. Receive Forecasted Demand from Clients
2. Receive Forecasted Capacity from Production Centers
3. Associate Forecasted Demand to Forecasted Capacity
4. Report Demand/Capacity Levels Across Production Centers
5. Support “What If” Scenario Sensitivity Analysis

→ Proactively Balance Forecasted Supply and Demand
→ Implement a Solution People Will Rave About!
Considerations for Solution Selection

- Cost
- Ease of Use
- Functional Fit
- Delivery Timeframe
- Vendor Responsiveness
- Ability to Meet “Phase 2” Requirements
Vendor Selection Process

- **March – Initial RFI via E-mail & Phone**
  - 1st Round of Vendor Down Selection

- **Early April – Iterative Requirements Definition / Vendor Web Demos**
  - 2nd Round of Vendor Down Selection

- **Mid April – RFP Development / Vendor On-Site Preparations**

- **Late April – RFP Release / On-Site Demos / Scoring of Non-Price Criteria**

- **May – RFP Receipt / Evaluation & Scoring of All Selection Criteria**
  - Vendor Selection, Reference Checks, and Contract Negotiation
Implementation Schedule

- **MAY:**
  - Functional Specifications Development & Approval – 6/6
  - Budget Approval – 6/7
  - Award of Business – 6/8

- **JUN-JUL → AUG → SEP:**
  - Iterative Agile Development & Component Testing
  - End-to-End & Client Testing

- **OCT:**
  - Internal/External Client Training
  - Go-Live – 9/26 (Internal) / 10/10 (External)
Excel spreadsheets are used by 150 million business people for planning, reporting and analysis, BUT Excel has some serious limitations as an enterprise application.

SmartSpreadSheet retains Excel’s power, flexibility and simplicity, but complements them with features required for managing robust, mission-critical spreadsheets.
SmartSpreadSheet Transforms Unmanaged Mission-Critical Spreadsheets into Enterprise Applications

**ON-DEMAND, BI-DIRECTIONAL SYNCHRONIZATION WITH BACK-END SYSTEMS.**

**FULL EXCEL FUNCTIONALITY** including formulas, macros, graphing, etc. Minimal training and high productivity.

**USE CASES ACROSS THE ORGANIZATION:** supply chain, demand planning, trade promotions, logistics, financial analysis, contracts, master data management, etc. In this case, users are collaborating on forecast updates.

**WORK ON-LINE OR OFF-LINE** confident that all changes will be synchronized and any disputes will be resolved.

**SECURE FORMULAS** from user access to maintain process consistency and data integrity. Use formulas of any complexity.

**COMPLETE MODEL OF DIMENSIONS AND HIERARCHIES** so users can specify summarization at any level of the hierarchy. Here, $ are totaled for each customer.

**SECURE MACROS** for workflow, business logic and synchronization.

**FULLY AUTOMATE GROUPINGS, SUMS, ETC.** based on template and input parameters.

**SIMPLY COMPARE MULTIPLE DATA VERSIONS.** Here, user sees Jun 09 forecast, but different selection criteria might result in multiple forecast rows.

**WORKFLOW ENGINE** to manage approval and review processes. Here, changed data is highlighted and may be subject to approval.

**GENERATE MULTIPLE WORKSHEETS** based on either grouping of customers, items, etc. Here, there is one sheet for each customer. System also supports a fixed format where each sheet has a different purpose.

**DETAILED AUDIT TRAIL OF NOTES AND CHANGES** in reports and/or worksheets to provide rich context for decisions.

**Dynamically generated content and layout from master templates** improve efficiency. Here, only items with trade spend show Units TPM and $TPM...users don’t see extraneous rows.
1. Do we have sufficient capacity to service forecasted demand?

2. Can we take on additional work and/or new customers?

3. If specific production centers are over-allocated, when will this be alleviated?

4. What would happen if we moved specific orders forward or backward on the production schedule?

5. What would happen if we increased production center capacity or balanced demand across sites?
Implementation Challenges

- Business Process Learning Curve
- Business Team Re-Org
- Business Process Re-Org
- Competition for Key Resources
- Customer Involvement and Agreement
- Data Quality

Overcome by Active Engagement of All Parties to **Ensure Team Success**
Results Achieved

✓ Enhanced Demand Forecast and Capacity Visibility
✓ Improved Demand & Capacity Forecast Accuracy
✓ Ability to Effectively Model “What-If” Scenarios
✓ Reduced Supply Chain Planning Administrative Costs
✓ Reduced Stock-Outs / Increased Client Sales
✓ Improved Client Relationships
✓ Team-oriented Communication and Problem-solving
Raving Fans

“One of the main comments / themes at today’s meeting was that this project has led to an unprecedented meeting of industry leaders working together to coordinate their efforts with the sole aim of maximizing the efficiency, output and relationship with their supplier. This project has created something that is certainly unique in our industry and we struggled to think of any other industries where you find 4 world class competitors gathering on a monthly basis to work together for everyone’s benefit.”
- Director, Client Account Management

“This project has been perceived as a real success by our customers. Senior client leadership has acknowledged that [the company] has made major strides in 2011 to improve its ability to manage supply and demand. The tool, along with our internal initiatives, integrated perfectly. We are much more on top of our game in terms of order commitments, throughput, and communications...spending more time now on discussing future demand patterns...a noticeable shift from reactive to proactive management.”
- Vice President, Global Account Management
Key Takeaways

1. Begin with a good plan
2. Execute to WIN (What’s Important Now)
3. Bring your personal strengths and soft skills to work
4. Employ good management AND superb project leadership
5. Create raving fans and celebrate success with your team
Top-Notch Talent

- 80% of A-Level Players Want to Move On with Their Careers
- What are Executives Seeking in Today’s Marketplace?

**Common Themes:**
- Cross-functional; global, virtual, collaborative mindset
- Solution-orientated “can-do” attitude
- Know business and improve business processes
- Can put the right people in the right roles with the right technology

**What’s New:**
- Strategically-focused career progression (company/industry/role, etc.)
- Industry is not as important; show adaptability and change leadership
- Orientation toward life-long learning – “Listen, Learn, Leverage, Lead”
- Passion with diplomacy; integrative mind with an appetite for risk
- Transparency & personal branding (especially with new generation)
- “Transportational Leadership” – How do we get there?
Advice for Aspiring IT Executives

- “This is the Era of IT” – Ability to use IT as a competitive weapon to:
  - Increase revenue
  - Continue to cut costs
  - Make Faster decisions
  - Magnify workforce effectiveness
- CIO as conductor vs. technical guru; importance of vendor management
- Alignment with business – “Cool isn’t going to accomplish anything”
- Evidence of business partnership and business transformation

Personal Criteria for Success:

Attitude, Aptitude, Integrity, Initiative
Questions & Answers

Michael Woore, MBA PMP

michael.woore@alumni.usc.edu

Connect with me on LinkedIn

Thank You