Nordic Project Zone

5th Annual Nordic Project Program and Portfolio Management Summit
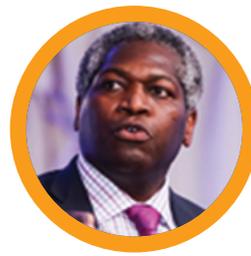
Bryan Barrow
Project Management Consultant and Speaker
Nova Consulting Ltd

How To Boost Project Leadership, Collaboration and Teamworking with Index Card Planning

Bryan Barrow informed the audience that the project management profession was reaching a critical time. There are exciting times ahead, as well as fear, danger and anxiety.

Over the past 20 years, there has been a growing acceptance of the project management discipline as a vital business tool. 97% of respondents to a PwC (PricewaterhouseCoopers) survey agreed that project management is critical to business performance and organizational success. Over the next 10 years or so, 15.7 million new project management jobs will be added globally. There is competition for people with project management skills, and salaries are increasing, especially for those with PMP (Project Management Professional) certifications.

The project management success rate is too low, and there are too many challenged projects. According to PwC, the main reason for this is poor estimating/missed deadlines. Just as more project managers are needed, older and more experienced project managers are retiring. Unfortunately, the next generation of project leaders are not being trained quickly enough with the required skills. This lack of investment in training combined with the exodus of older

workers during a time of global expansion means the required people will not be available. Attracting talent will be difficult.

Mr. Barrow feels that developing existing employees to be better at planning projects is an effective approach to this situation. This will improve success rates and team morale, which will help to attract new talent. All of this will allow for better execution of business strategies.

Mr. Barrow shared an approach to planning that he feels will make a big difference. It helps to develop people, and improves leadership, collaboration and performance. It is called "Index Card Planning".

Projects fail for three main reasons:

Lack of a clear goal. Goals must be simple, well-articulated and understood. They must be something a team can organize around, and must be aligned with an organization's business strategies.
Lack of collaboration. Teams must work together from an integrated plan, and must communicate to identify any activity interdependencies, and to prevent problems. Collaboration problems are exacerbated when new scope, activities

See high quality presentations at
3–5 November 2014, Radisson Blu Falconer Hotel, Copenhagen
www.nordicprojectzone.com

and resource requirements are identified in the middle of a project.

Lack of teamwork. True teamwork often does not exist. When it does, it can overcome the challenges of a poor plan. Good relationships and team spirit must be fostered. Having a kickoff session at the beginning of a project is a good idea. This meeting should focus on building good relationships and teamwork.

The combination of these problems cause projects to fail. These problems must be resolved at the beginning of the project. There will not be time to solve them during project execution.

Planning projects with sticky notes is popular. Mr. Barrow does not like this approach. He concedes that sticky note workshops bring everyone together to plan a project. They also allow for a kickoff, and various activities and dependencies to be identified in order to build a work breakdown structure, etc. But there are potential disadvantages. Participants often do not prepare prior to a workshop. Many invitees opt not to attend the workshop, since they feel they understand the project. Quality of the written output varies: Sometimes the writing is small, sometimes it is large and sometimes it is illegible. The sticky notes themselves are also very small in size.

Often, the sticky notes need to be relocated and organized during the workshop. During this process, notes often fall to the floor. Replacing them on the wall wastes time and causes confusion. After the workshop, the sticky notes must be collected and transported to another location to be converted into something valuable. Subject matter experts must be in the room during the workshop, and must actually write down the necessary information. This results in lost knowledge transfer, lost context and a low level of consistency. New members of the team will also find it difficult to learn from the workshop. The overall workshop itself may suffer if the project manager facilitates it, as they may not be the best choice to facilitate. Since there is nothing to link tasks to a methodology, the process can cause project methodologies to be ignored. There can also be problems with

facilities, room layouts, logistics, etc.

Another planning option is "Index Card Planning". Mr. Barrow feels this approach helps to focus on a goal, complete more extensive planning and allows the enforcement of project methodologies. He learned the approach while working with large bank in the UK, and has refined it over the years during several workshops.

Index cards are much larger than sticky notes, come in different colors and can be folded. They can be preprinted to maximize planning time during a workshop, and can be reused. A high-level plan can be completed using index cards in a matter of minutes. A detailed plan can be completed in a few hours. Index cards allow the creation of extensive documentation, which facilitates learning. Collaboration is also improved, since people are more active in owning the planning process, and communicate better with each other. Physically arranging the index cards around a table also promotes the creation of better ideas and insights, and cards can be customized to support artifacts required for specific project management methodologies.

Index cards support planning based on iterations. Begin by creating a shared understanding of the project vision and business strategy. Next, identify the required workstreams, then plan the key milestones. After the milestones, the detailed work products or deliverables can be determined. These work products help to achieve the milestones. Achieving the milestones helps to achieve the project vision.

Planning is accomplished using different colored index cards. Mr. Barrow shared a color strategy:

- Blue cards are used for workstreams, and describe how the project will be divided into major streams of work.

- Green cards are used for key milestones to help focus on the creation of business value and align with the business vision.

- White cards are used to document optional work products that might need to be completed (but are not

See high quality presentations at
3–5 November 2014, Radisson Blu Falconer Hotel, Copenhagen
www.nordicprojectzone.com

required). A workshop goal is to decide the work that needs to be completed, as well as the work that does not need to be completed.

- Pink cards are used for mandatory work that must be completed by all projects. For example, creating a project charter, business case, implementation plan, etc. This helps to force compliance with project methodologies.

- Yellow cards are used for governance reviews, which are points where the project is evaluated to ensure it is on the path to success, or to determine if it should receive more funding, or should be terminated, etc.

- Another blue card is folded and turned up horizontally and used to identify time: key points in the project.

Excluding a lunch break, an Index Card Workshop takes about three hours to complete. The most important hour is the first hour, which is where the project vision, business goals and benefits are clearly articulated. During the second hour, the project is divided into the workstreams, and key milestones are agreed upon. In the third hour, the work products needed to achieve key milestones are produced, including the timeline and governance review points.

Mr. Barrow offered guidance to get repeatable results:

- Get a Sponsor Brief to make certain the team understands the business goals.

- Follow a clear Workshop Design. Decide who to invite and the location (onsite or offsite).

- Preparation before the workshop is important: obtain pens, cards, flipcharts, etc. Also preprint index cards.

Hold the workshop, but avoid facilitating if you are the project manager.Instead, be a participant and focus on what the project needs to succeed.

PMO members can facilitate workshops tbuild relationships, support the use of methodologies and gain exposure to projects. People attending should be managers, team leaders and specialists, since they have a larger perspective on the organization.

Follow-up: Send out a workshop summary as soon as possible. Translate the artifacts that came out of the orkshop (e.g., plans, risks, issues, dependencies, etc.). Focus on what was successful during the workshop (so it can be recreated over time).

A colleague of Mr. Barrow planned projects by sending out a basic MS Project document and requesting feedback. He then updated the document with any feedback received from the team (which was often not provided). He began using Index Card Planning, and now gets better feedback and improved results. Another colleague received a quick tutorial on using Index Card Planning the night before a workshop, and was able to successfully use it the following morning.

Mr. Barrow closed by sharing the link for a website he has created about Index Card Planning: www.indexcardplanning.com. He reiterated that we are entering a transition period where older workers are retiring and younger workers are taking center stage. The next few years could be frightening and turbulent, but can also be fantastic and fulfilling. Project managers have the power to achieve fantastic results that benefit their organizations and themselves. Mr. Barrow encouraged everyone to use that power soon!

See high quality presentations at
3–5 November 2014, Radisson Blu Falconer Hotel, Copenhagen
www.nordicprojectzone.com