

THE BLACK PEN CONCEPT

Written by Rob Zanfardino, 03/15/05

HOW TO MANAGE PROJECT RELATIONSHIPS AND HAVE THE CUSTOMER ASKING FOR MORE

Over the last 20 years as a Project Manager, Senior Project Manager, and Program Manager I have witnessed the changing role the project manager / project team plays in the project cycle. It has ranged from being the most technical to being the one who has a better understanding of the business rules than even the business stakeholders. However there has always been one constant that has existed but never spoken of in any detail, managing relationships.

Whatever background you come from, managing relationships will be your primary responsibility as a project manager. I feel so strongly about this premise that over the years as an adjunct professor teaching Business Process Management courses or as Senior Project / Program Manager, one of the major pitfalls that arise time and time again is the inability for project managers as well as other team members to truly understand the importance of managing relationships. As project managers, in order to have a successful project we must manage relationships throughout the project life cycle. This is becoming more apparent as the project manager is asked to become more involved in "Up Selling". Up selling simply put is the act of contributing to the sales process by non sales type individuals like the project manager who can suggest new projects to the customer while currently working on the existing one. This is the main reason more than anything else that a great project leader does not need to be the most technical asset on the project but he / she must be the best relationship builder. All too often when things go wrong we seek technical reasons for the issue when in fact it is very much a non technical reason.

First let us agree on a basic premise about time management and your role as a project manager. We have all heard of the 80 / 20 rule regarding issues. Simply put whatever your role is, you tend to spend 80 percent of your time resolving 20 percent of the work that requires most of your attention / efforts. If we were to implement this concept as it pertains to the project life cycle, 80 percent of the project manager's time should focus on the first 10 percent and last 10 percent of the project. Defining relationships, building relationships and establishing confidence and trust between you and the customer need to be established from the get go. By building the relationships early on, you begin to build trust with the customer and therefore get the customer to have confidence in the project deliverables and sign off after the user acceptance phase.

As a Project Manager / Senior Project Manager and Program Manager for companies like IBM, Bristol-Myers Squibb, and my own consulting firm, I was called in many times to lend my expertise to handle major project issues. Although at first it may appear to be technical, these issues pertained more about customer relationships or the lack of building them. Frequently it appeared there was not enough time spent on the first 10 percent and last 10 percent of the project. If the first phase is to identify customers key stakeholders and develop the project scope etc. and the last phase is to ensure all the requirements have been completed, all we need to complete is the customer to sign off on the deliverables. You are doomed from the start if you do not fully understand who your customer is and what they want.

As project managers if you ever performed debriefing meetings and plotted why some of your projects went belly up inevitably you discover how important these two phases really are and you begin to realize why Scope Creep finds its way into projects. First, I do feel that you can never spend enough time on the first phase of the project life cycle. It amounts to pennies on the dollar on the back end but can cost you plenty if the first phase is not fully explored and capitalized. Because not enough time is spent on the Requirement Definition Phase, I have seen internal

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project managers and consulting project manager more than once stand in front of the customer requesting them to sign off on the project finals and begin to do the "Project Manager 2 Step" or "Please Sign on the Dotted Line Shuffle". It does not matter if your customer is internal or external, time is money and both sides feel the pain when we miss our milestone dates.

So how does The Black Pen Concept come into play and why was it conceived? It is for these very same reasons I described to you that I formulated this concept trying to put form to building the necessary relationships, understanding the project team and the customers. As an adjunct professor teaching Business Process Management courses I was trying to focus my class of new project managers on one of their most difficult problem to overcome, managing relationships.

Working for IBM, one of my first positions was that of a junior accountant. As a junior accountant, I would need help from other senior accountants and I learned very shortly from their curt remarks that they never seemed to have time to answer my questions during the fourth and first week of the month. Yet if I asked these same folks any other time they would be very gracious to me and spend time helping me solve the problem. After months of getting battered around and swearing to myself that I will never stay in this field, I learned their major work load would hit on the last week (inputting all the information) of the month and on the first week of the month (creating all the reports). Another thing I learned is accountants appear to see things in terms of debts or credits, black or white. Both sides of the ledger either balances or it does not. This perception even flowed into their personal behavior. I learned over time to accept their answers as short sweet and to the point and not be offended. Being promoted and moving on into a sales support position I learned that sales / account managers looked at the world completely different. One of the first priorities for sales / account professionals when establishing relationships with a new / existing customer is to find some middle ground for the customer to agree with and for the customer to begin to say yes. From that point the sales / account professionals will be better able to start the negotiation process after they can win the customer's confidence.

Hence The Black Pen Concept was created by me to simply describe how people think and view things from their perspective and what you should be aware of to be successful on a project. One must always be aware and never lose sight of who they are working with and more importantly where they are coming from. By holding a black pen up to a room filled with accountants and asking what color it is, the majority would say black (accountants perceive things as debts or credits, black or white). Hold that same pen in front of sales / account managers and they would say the pen is not really black but more like charcoal gray. Why the difference in opinion? The sales person by saying the pen is neither black nor white will not alienate you to one side or another and hopefully get you to agree with them. When they can get you to say yes once, they can begin to position you for the sales closing.

Of course, The Black Pen Concept is based on generalities and not all accountants think one way or another but the basic premise still holds true especially in terms of a project manager who needs to spend a larger percentage of time building and managing relationships. To illustrate this point further with my students attending the Business Process Management courses, I used the following example: As an internal auditor for IBM conducting a process review on a silicon chip production line, I noticed several technicians were viewing chip production through their microscopes. The lesson learned is that you need to be very sensitive when talking to someone like that about seeing the big picture when in reality their big picture for them exists under a microscope.

In fact, more and more of the project manager's time should be and is being spent on pre and post sales activities. How many times have projects stumbled right from the gate when they have been rushed through or written up by the account manager? Remember the account manager is just trying to get the customer to sign on the dotted line. To be successful, the project manager

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must be involved from the beginning of the project life cycle or the project is doomed to fail. If you know where people are coming from you have a better chance of predicting when and where they are going. Hence you mitigate one of the biggest risks in project management: Failing to fully understand the requirements.

About the Author



Robert J. Zanfardino, Senior Project / Program Manager, has worked with multi billion dollar corporations such as IBM, Gentiva HealthCare, CompuCom, and Bristol-Myers Squibb, as well as smaller midsize companies while managing his own consulting company. This deep range of experiences over the years developed Rob into a Senior Advisor playing pivotal roles by identifying new strategies within corporations as they effect the project life cycle. His ability to envision long term solutions combined with structuring sensible implementation plans have made Rob a valued asset and “Go To” resource. As an Adjunct Professor focusing on Business Process Management methodologies, Rob has devised quality strategies used to streamline processes that focus on the customer’s needs. Rob is currently consulting with corporations enhancing their relationship-building model and client engagement cycles for project teams by developing “Up Selling” strategies and solutions. Rob can be contacted at: zanfardino4@earthlink.net.

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