

PMWT Tips & Techniques Article for December 2006

## Project Communications Tip: Manage Moment of Truth Activities

*By Robert Posener*

The term "Moments of Truth" was popularised by the book of the same name by Jan Carlzon. Moment of Truth Activities are where there are interactions ("touch points") between your enterprise (staff) and an external enterprise (staff). Moment of Truth Activities mainly apply to Clients, but also apply to subcontractors, vendors and suppliers. From a project perspective, these vary depending upon:

- If your project is for an external Client or internal organization or business unit Sponsor
- If you are the prime contractor or systems integrator and there are also subcontractors, vendors and suppliers

### Why

Why is it important to know what Moment of Truth Activities exist? Because you need to control the flow of project communications. You need to ensure that the right message is getting to the right people at the right time. You want to have the right person deliver the message. You don't want any loose cannons. You don't want any miscommunications. You don't want to tell people too much because that reduces your room to maneuver and your plausible deniability. Disclosing too much to people who are above you in your enterprise's hierarchy opens the Pandora's Box for them to micro manage the project and you.

Similarly, it is important to understand what goes where. Each different Moment of Truth requires different content and staging. Knowing what they are allows you to be proactive about them. You should have closely-scripted procedures for each one. So what should "closely-scripted procedures" look like?

### How

Your project management methodology should define in great detail, a procedure for each Moment of Truth Activity. It should include the following (where appropriate):

- Desired Outcomes
- Agenda
- Standard Questions
- Standard Responses

- Inputs
- Outputs
- Content
- Themes
- Staging
- Authorities
- Planning and Preparation
- Handouts
- Participants and their Roles
- Invitation Letter
- Dynamics
- Post-Meeting Activities

The more detail that you can define, the better these Moments of Truth Activities will be executed as well as the more help you will be providing your people.

Further, you need to take care in choosing who (from your enterprise) authorizes and performs each Moment of Truth Activity. Ensure that they are able to communicate effectively with all of the recipients.

Because of the significance of the project schedule on the whole project, there is no differentiation between "Project Time Moment of Truth Activities" and other Moment of Truth Activities. All project management Moment of Truth Activities potentially can cause discussions to take place about the project schedule.

### ***Client Moment of Truth Activities***

#### **Pre-Sales Meetings**

Be careful! The conduct of these Moment of Truth Activities is usually not controlled by the Project Manager. This is where there is the potential for many loose cannons to exist. These formative Moment of Truth Activities where the Salesperson meets with the Client set many expectations. Therefore, these Moment of Truth Activities need very clear rules of engagement:

- Initial Project Request Meeting
- First Prospect Meeting
- Pre-Sales Meetings
- Solution Presentation Meetings
- Proposal Submission Presentation Meeting
- Contract Negotiation and Signing Meetings

#### **Post-Sales Meetings**

The conduct of the following Moment of Truth Activities are usually under the

control of the Project Manager. Therefore, these Moment of Truth Activities need clear project team communications rules:

- Project Request Review (PRR) Meeting
- Phase Zero Interview Meetings
- Phase Zero Report Presentation Meeting
- Project Business Case Review (BCR) Meeting
- Project Management Planning Workshop
- Project Scope Definition Workshop
- Project Scope Definition Interview Meetings
- Project Risk and Opportunity Identification Workshop
- Project Schedule Development Workshop
- Project (Team) Kick-Off Workshop
- Project Phase Kick-Off Workshops
- Project Phase Celebration Meetings
- Project Startup Review (PSR) Meeting
- Project Monthly Performance Review Meetings
- Project Schedule Progress Review Meetings
- Project Steering Committee Meetings
- Project Review Board (PRB) Meetings (implies bad news)
- Project Resourcing Review Meetings
- Project Change Control Board (CCB) Meetings
- Project Purchase Order Raising Meetings
- Project Gate Review Meetings
- Project Audit and Health Check Review Meetings
- Impact Assessment Presentation Meeting
- Project Work Product Presentation/Delivery/Approval Meetings:
- Submission of Project Charter for Approval
- Submission of Project Management Plan (PMP) for Approval
- Submission of Project Schedule for Approval
- Submission of any Work Product version for Approval or Acceptance
- Submission of Project Monthly Performance Reports
- Submission of Invoices for Payment (may have timesheets attached)
- Submission of On-Site Project Team Members' Timesheets for Approval
- Submission of On-Site Project Team Members' Expenses for Approval
- System Prototype Review Meetings
- Submission of Project Change/Variation Impact/Quotation for Approval
- Project Team Member Meetings with Client Staff:
- Stakeholder Requirements Gathering Interview Meetings
- Joint Application Development (JAD) Workshops
- Existing System Cross-Check Review Workshops
- Asking for Clarifications
- Data Cleanup Assistance Meetings
- Acceptance Testing Assisting Meetings
- Training Course Delivery
- Installation Planning Workshop
- Organisation Readiness Review (ORR) Meeting
- HelpDesk Service Call

- Project Defect Report
- Project Closure Review (PCR) Meeting
- Post-Project Review (PPR) - Client Meeting
- Benefits Realisation Review (BRR) Meeting
- Customer Satisfaction Focus Session
- Post-Training Course Review
- Project Contract Performance Review
- Monthly Operations Review Meeting
- Work Order Status Review Meeting
- Service Call Status Review Meeting
- Complaint Status Review Meeting

### ***Subcontractor/Vendor/Supplier Moment of Truth Activities***

All of the above under "Client Moment of Truth Activities" apply, but with the opposite perspective since you are the subcontractor's, vendor's or supplier's Client.

Here is the really important point: Systems integration projects often get into trouble because the prime contractor doesn't manage the subcontractors, vendors and suppliers to the same level of meticulousness as s/he does the Client. Do not skimp on these subcontractor, vendor and supplier Moment of Truth Activities.

**Editor's Note:** The above article was reprinted with permission from the October monthly newsletter of PMComplete Pty. Ltd.: [www.pmcomplete.com.au](http://www.pmcomplete.com.au).



Robert Posener



*Robert Posener is founder and Managing Director of PMComplete Pty Ltd, a project management professional services company in Australia. A Project Manager for over 30 years, Robert has managed information technology and business projects and programmes for computer hardware, software and consulting companies in Australia, New Zealand, Papua New Guinea, Indonesia, Hong Kong and USA. He is an active member of PMI's Sydney Chapter and College of Scheduling, and is a Fellow of the International Council for Project Management Advancement (ICPMA). He can be contacted at [robert.posener@pmcomplete.com.au](mailto:robert.posener@pmcomplete.com.au). Robert is also an international correspondent for [pmforum.org](http://pmforum.org) in Australia. More information about Robert can be found at <http://www.pmforum.org/pm%20forum%20team/index.htm>*