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Training the Customer in Project Management

By Rebecca Winston, Esq.

Pleasant moments of reward don't come along every day and when they do, one should treasure them. I do. I had one of those days of reward when I came to the end of week in which I had one of our customers for a Program I manage in the project management class arranged for staff.

Project managers, myself included, have long stated that if our customers and upper management only understood in more detail what we do; our role, efforts, and product would be more appreciated and applied. In fact, books and studies have been done on how best to get them to understand the role of project management. In the class, I had not only one of my customers from the US Federal Government but three of the upper management team. In this age of cutbacks on training, the class was indeed a luxury. By inviting the customer into the fold, the class became more cost effective for the customer and the idea was well received by the senior management for the customer as well as internal to the company for which I work.

Senior management attended as they noticed that those who had attended the first class were much more prepared and spoke a common language. The previous class participants also appear surer of themselves in their job and the role of project manager. Besides as stated previously, training is not an option these days unless it is a job requirement, so this training was one not to be missed.

Bringing a customer and upper management into the classroom with staff can be an intimidating proposition. The issues you may face are:

- Will staff participate in classroom discussions?
- Will staff participate in the classroom exercises as they might absent such representation?
- When asked a question will responses be measured with the other participants' reactions in mind?
- Will they become mentally blocked due to the presence of the other participants and not receive the class input as they might otherwise?
- Can learning actually happen with such participants in the classroom?

Most of these considerations could be viewed as huge threats to such an endeavor. I was a bit wary, but not to the extent that the opportunities did not outweigh the potential threats. I also did a great deal of communication prior to ensure no one

was surprised by having the customer in the class or having the upper management present. I discussed the benefits of the class participation by one and all.

Those opportunities beyond the changing the perceptions that seemed to be held about project management were:

- The participants would have a shared lexicon.
- The eroding of the we/they perception that exists on some projects.
- The potential exists for greater understanding of how all the elements are achieved by the project manager.
- The potential exists for gaining a greater understanding of the value of project management.
- The potential exists for more robust communication in the future on the projects with sponsors and customers.
- Finally, the potential exists for more overall recognition of the position and importance of project management to the overall success of the corporation or customer operation.

And, another benefit that was not apparent immediately was that the knowledge of project management would change how the Requests for Proposals would be crafted. The next Request for Proposal that was received asked for a detail risk register. Prior the focus was on one or two risks that the customer perceived from their vantage point and not always ties to the work that the company as the contractor would be performing.

Each night I had an informal conversation with the client about the class and its value. The conversation was exuberant and filled with anticipation of how a greater understanding of project management could lead to more successful interactions. This anticipation was greatest when discussing the risk portion of the instruction. As stated this anticipation translated into sharing of what was learned with others in the customer office and resulted in a different Request for Proposal that what had previously been generated.

Of course not all communication was raised or proposal calls the better for the class, but the process is evolutionary and will need to serve as only the foundation upon which the rest of the effort may be built. Follow-up with the customer will need to occur. Ensuring the company continues to issue communication using the project management lexicon must occur to reinforce the common language. The final item we must do as a company is to ensure that our project management delivery is of the highest quality we can deliver. This action will take the whole team of project managers, the project assistants, and support staff and of our upper management. With the participation and oversight of one and all, delivery of the highest quality project management will be achievable.

For the upper management in the class, the understanding that there was still a great deal of knowledge and process that they needed to become aware in the world of project management was worth every moment of anxious anticipation about reaction. Their participation in the class and exercises made it clear to the rest of the participants that the class was a learning experience for everyone. The concept of leading by example is often touted and written about in the leading books and journals, but one seldom sees it demonstrated in such an obvious fashion.

Before one thinks that it was easy for them to attend the class, please realize that the attendance carried with it many perceived risks in the form of threat for them. One of the first is being viewed as a peer rather than upper management in the class. The risk of not being the smartest in the class when you direct the attendees' work efforts was a risk that was forever present, especially when individuals were asked to divulge how they did on the tests. Not productively adding to discussions is a risk because normally these individuals have a great deal to say the subject of the management of projects in the company. The expectation that all attendees take the exam for the Project Management Professional (PMP®) certification was also looming over them. What if they failed?

The final reward was that the first PMP® achieved in the class was the Chief Operating Officer (COO). What an example he set for the rest of the participants!

If one is considering a class in project management for staff, consider opening the class to your customer or to upper management. You might be pleasantly surprised.

About the Author:***Rebecca Winston, Esq.****Author*

Rebecca (Becky) Winston, Esq., JD, PMI Fellow, is a former Chair of the Board of Directors of the Project Management Institute (PMI®). An experienced expert on the subject of project management (PM) in the fields of research & development (R&D), energy, environmental restoration and national security, she is well known throughout the United States and globally as a leader in the PM professional world. Becky has over 25 years of experience in program and project management, primarily on programs funded by the US government. She is a graduate of the University of Nebraska's College of Law, Juris Doctorate (1980), in Lincoln, Nebraska and has a Bachelor's of Science (BS) degree in Education from Nebraska Wesleyan University in the USA. Active in PMI since 1993, Rebecca Winston helped pioneer PMI's Specific Interest Groups (SIGs) in the nineties, including the Project Earth and Government SIGs, and was a founder and first co-chair of the Women in Project Management SIG. She served two terms on the PMI board of directors and was elected a PMI Fellow in 2005. She is a licensed attorney and a member of the American Bar Association and the Association of Female Executives in the USA. She has extensive recent PM experience in the areas of national defense and security, and has worked closely with local, regional and national officials, including federal agencies, the US Congress and the Pentagon. Becky is currently Chair of the US Technical Advisory Group for the new ISO Standard for Project Management, currently under development. She also serves as a Global Advisor to PMForum and is a PM Ambassador™, available for international speaking engagements. She lives in Idaho Falls, Idaho, USA.