Results Accelerator Workshop

Vermont Technical Alliance

April 2020
Introductions
We are at a crossroads…
Disruption is a catalyst for change

How can we use the disruption caused by COVID-19 to change how we work…

& Accelerate our results?
Our Journey Through Change

Happiness
At last something’s going to change!

Fear
What will this mean for me?

Threat
This is worse than I thought!

Guilt
Did I really do that?

Disillusionment
I’m off. This isn’t for me

Denial
Change, what change?

Depression
Who am I? What am I doing?

Testing
Fine, I’ll give it a go

Acceptance
I can see myself in the future

Moving forward
This can work and be good

Anxiety
What is this?

Hostility
I’m not going to let this happen!

?
Stressors:

- Anxiety due to loss of control
- Uncertainty about what change means
- Lack of information leads to rumor mill
- Change from comfortable/familiar processes
- Real or perceived heavier workloads
- Experience with previous changes

Source: The Change Cycle Model
Group Chat

How do you handle change?

How have you and your team moved through the current disruption and associated change?

Which stage are you in now?
Stop Resisting and Let Go…

ONE REASON PEOPLE RESIST CHANGE IS BECAUSE THEY FOCUS ON WHAT THEY HAVE TO GIVE UP, INSTEAD OF WHAT THEY HAVE TO GAIN.
Too many projects…

Fail to be completed 18% 
Have cost overruns 33% 
Do not meet their business goals 33% 
Delivered late or over budget 43%

The Standish Group 
Gartner 
PMI 
The Standish Group
Our teams are under pressure...

Lack of initial planning results in unforeseen issues that derail projects

Constant change of priorities and context switching results in loss of momentum

Management don't understand what is required & it's hard to explain without a plan

Leadership and management skills are needed to navigate these situations
What challenges affect you or your team's ability to deliver what your work needs?

- Securing and managing resources: 57%
- Setting and meeting deadlines: 22%
- Establishing clear outcomes and deliverables: 39%
- Developing and managing budgets: 28%
- Clearly articulating the scope of work (what's in, what's out): 44%
- Communicating effectively: 44%
- Prioritizing work: 56%
- Other (please specify): 22%
- None of the above (no challenges affect me or my team):

Bar chart showing:
- Resources: 18 (81.8%)
- Timelines: 14 (63.6%)
- Clarity on Requirements: 11 (50%)
- Budget: 12 (54.5%)
- Scope: 3 (13.6%)
- Accountability: 6 (27.3%)
How our teams feel

How Teams Feel

- Resentment - Silos/teams, neg. gossip
- Confusion - Competing priorities
- High dependency on PM - hand holding
- Resent being brought in late
- Not invested - other projects/competing demands
- ‘Yes team - Get it Done - Accomplished - Miracle!
- Too much or too little oversight
- Indecisiveness/Frustration

- Go it alone to get it done
- Frustrated
- Tired + exhausted
- Working longer to get caught up
- Frustrated by decisions made with no input
- Waiting, stalled, stuck
- Unappreciated
- Dictated to w/Upper Mgmt decision
- Reactionary / changing priorities
- Left out
- Too involved in all details
- Physically - Project done - Accomplished
- Overwhelmed or proj. start
Embrace The Opportunity for Change

PROGRESS is IMPOSSIBLE without CHANGE

- George Bernard Shaw
# Capabilities Required For Success

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Leadership</th>
<th>Execution</th>
</tr>
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<tbody>
<tr>
<td>Organizational Strategy &amp; Planning</td>
<td>Leadership &amp; Influence</td>
<td>Process &amp; Methodologies</td>
</tr>
<tr>
<td>Are we doing the right work?</td>
<td>Developing organizational maturity</td>
<td>To ensure consistent results</td>
</tr>
<tr>
<td>Financial &amp; Budget Management</td>
<td>People &amp; Competencies</td>
<td>Project Execution &amp; Performance Management</td>
</tr>
<tr>
<td>Maximize ROI and control costs</td>
<td>Developing the team</td>
<td>Manage to achieve outcomes, and continuously improve</td>
</tr>
<tr>
<td>Governance</td>
<td>Project Leadership</td>
<td>Resource Management</td>
</tr>
<tr>
<td>Projects align with strategic goals</td>
<td>Keep team motivated &amp; stakeholders engaged</td>
<td>Optimizing resource utilization</td>
</tr>
<tr>
<td>Decision-making</td>
<td>Organizational Change Management</td>
<td>Information Sharing - Project Repository &amp; Tools</td>
</tr>
<tr>
<td>Aligns with strategic and project goals</td>
<td>Ensure that organization is ready to adopt change</td>
<td>Enable knowledge sharing and access to information</td>
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## Business Results Maturity Model – Maturity Levels

<table>
<thead>
<tr>
<th>Level 0: Nonexistent or Ad hoc</th>
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</thead>
<tbody>
<tr>
<td><strong>Level 1: Initial or Reactive</strong></td>
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<tr>
<td><strong>Level 2: Developing Emerging Discipline</strong></td>
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<td><strong>Level 3: Defined Initial Integration</strong></td>
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<td><strong>Level 4: Managed Increasing Efficiency</strong></td>
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<tr>
<td><strong>Level 5: Optimized Enterprise Consistency</strong></td>
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### Level 0: Nonexistent or Ad hoc
- **Characteristics:**
  - Lack of a clear strategy or plan exists.
  - Initiative and ad hoc processes are common.

### Level 1: Initial or Reactive
- **Characteristics:**
  - Initiatives are reactive.
  - Processes are defined on a case-by-case basis.

### Level 2: Developing Emerging Discipline
- **Characteristics:**
  - Initial processes are defined.
  - Processes are based on best practices.

### Level 3: Defined Initial Integration
- **Characteristics:**
  - Processes are well-defined and documented.
  - Processes are evaluated and refined.

### Level 4: Managed Increasing Efficiency
- **Characteristics:**
  - Processes are continuously improved.
  - Metrics are used to measure performance.

### Level 5: Optimized Enterprise Consistency
- **Characteristics:**
  - Processes are standardized and aligned.
  - Metrics are used to measure and improve consistency.

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### Organizational Change Management
- **Environ.**
  - Ensure that organizational change is planned and communicated.

### Resource Management
- **Optimizing resource utilization**
  - Ensure resource management is optimized.

### Project Performance Management
- **Improving project performance**
  - Ensure project performance is improved.

### Data & Project Management
- **Managing data and project management**
  - Ensure data and project management are managed effectively.

### Organizational & Technology Strategies
- **Aligning strategies**
  - Ensure organizational and technology strategies are aligned.

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### Level 0 - Nonexistent or Ad hoc

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### Level 1 - Initial or Reactive

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### Level 2 - Developing Emerging Discipline

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### Level 3 - Defined Initial Integration

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### Level 4 - Managed Increasing Efficiency

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### Level 5 - Optimized Enterprise Consistency

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So how do we ensure success?

- Clear vision & purpose of intended outcomes
- Aligned with strategic direction
- Organizational change is managed strategically
- Detailed plan & manage the details
- Transparent team communications
- Project risk and issues are managed

Critical Success Factors

- Engaged sponsors, executive leadership, and stakeholders
- Clear ownership and accountability
- Collaborative team approach
- Clearly defined requirements
- Scope boundaries are well defined
- Stakeholder expectations managed
- Quality managed for all deliverables
ASSESS & ACCELERATE: WORKSHOP
Question #1

CLARITY

Are you doing the right work?
### Situational Assessment

<table>
<thead>
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<th>Internal origin (attribute of the organization)</th>
<th>Helpful to achieving the objective</th>
<th>Harmful to achieving the objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengths</td>
<td></td>
<td>Weaknesses</td>
</tr>
<tr>
<td>Opportunities (attribute of the environment)</td>
<td></td>
<td>Threats</td>
</tr>
</tbody>
</table>

- What are you struggling with currently?
- What bottlenecks do you have?
- What are your current constraints?
- What concerns do your staff have?
- What concerns do your stakeholders or clients have?
- What are you unable to influence or control?
- What assumptions are you making?
Assess & Triage Current Issues

• What issues are your teams dealing with right now?
• What is the impact of these issues on your clients/stakeholders, revenue & goals?
• What are their current constraints in resolving these issues?
• Where do they need support or assistance?
• What issues might they be dealing with that are not relevant right now?
• Are they working on the highest priority issues?
Assess Current Risks

• What risks may affect your organization/project?
• What risks do you see in getting back to a "normal" work environment?
• If they occur, what might the impact be?
• What is the likelihood of those risks occurring?
• How might you manage or mitigate those risks?
• Whose help might you need to manage those risks?
Review and Revise Strategic Plan

Situational Assessment

- Review current strategic plan
- Are the original vision, goals, objectives still valid?
- Do the intended outcomes still make sense?
- What should be deferred?
- What should be added?

Review Current 2020 Strategic Plan

- Schedule a checkpoint review every 30-45 days until situation has stabilized
Question #2

TIMING

Is this the right time for this work?
What are your **new top 3 priorities**?

- Review issues, risks and new strategic plan with your team
- What are the top 3 priorities for the next 30-60 days?
- What is the expected outcome of each of these priorities?
- What is the impact of not completing this work?
- Communicate plan 30-60 day priorities to your team and stakeholders
Question #3

TEAM

Does your team have what they need to be successful?
# High Performing Teams

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<tr>
<th>Effective Collaboration</th>
<th>Effective Leadership</th>
<th>Unified Vision &amp; Commitment</th>
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<tbody>
<tr>
<td>Culture of Respect</td>
<td>Mutual Trust</td>
<td>Hard Project Skills</td>
</tr>
<tr>
<td>Strong Communication</td>
<td>Negotiating Skills</td>
<td>Clear &amp; Shared Goals</td>
</tr>
<tr>
<td>Challenge Each Other</td>
<td>Focus on Outcomes</td>
<td>Organized &amp; Delivery Focused</td>
</tr>
</tbody>
</table>
TEAM – Creating an **environment** for success

Simon Sinek Inc.
1,048,208 followers
37m

Leadership is not a journey to rise in the ranks. Leadership is a journey to help those around us rise.
Focus on Relationships

- Communicate, Communicate, Communicate
- See input from your teams – how can you help them?
- Plan daily check-in calls:
  - Start with – how are you today?
  - What is on your list for today?
  - Is there anything blocking your progress?
  - End with - how can I support you?
- Schedule monthly virtual town-halls
- Send out email weekly with overall update across the organization
Team Building & Enrichment Opportunities

What do you not have time to do generally?

- Products that you can refine
- Processes and workflows optimization
- Develop tools to help your team and organization

Assess how you are all working as a team to identify what you can improve on so that you can collaborate more effectively and work more efficiently together.

Determine who you can help as a team and how you can help them.

- Maybe this is someone inside your organization or your clients
- Give back to others outside of your organization. Figure out a way to give back as a team.

Identify what you need to learn as a team - and set aside time for professional development.

- Virtual brown bag lunch where someone presents on a topic
- Professional book club where you share lessons learned from books you are reading.
- Watch a training or Ted talk together and then discuss and apply the lessons to your world.
Team Pulse-Check

Team Engagement:
- How are your team dynamics right now?
- Are team collaborating and working effectively together?
- Is there a high degree of ownership and accountability?

Resources:
- Do you have the right resources on the team?
- Do they understand their role?
- Do they have the right skills?
- Are they available to complete their assigned tasks?
- What are their current challenges and constraints?
Question #4

FOCUS

Are you executing the work in a way that is **achieving results**?
Mind Full, or Mindful?
Managing the Work – Success Factors

Plan
- Ensure that the right people are working on the right tasks, at the right time
- Identify high risk tasks, and focus on those first
- Clarify scope – what is required, and how it will be achieved
- Continual review and refinement – progressively add detail, update estimates, timelines

Team Collaboration
- Team know which tasks are assigned to them and expectations of what is required from them
- Communication – team escalate when tasks become difficult, or unforeseen issues arise
- Recognize competing demands on each person’s time, and impacts
- Have visibility into each person’s challenges constraints.

Organized Approach
- Ensure that team know where to find the information they need and who to ask for help
- Priorities and expected outcomes are documented clearly so team to understand plan
- Upcoming activities for next 2 weeks – visibility for team
- Communicate overall status – full picture
We surveyed 182 senior managers in a range of industries: 65% said meetings keep them from completing their own work. 71% said meetings are unproductive and inefficient. 64% said meetings come at the expense of deep thinking. 62% said meetings miss opportunities to bring the team closer together.

Harvard Business Review
Stop the Meeting Madness

Meeting Cost Calculator
Tips for Effective Virtual Meetings

**Planning:**
- Clear agenda with time blocks and assigned lead
- Ensure purpose is clear and right attendees are invited
- Clear roles – meeting facilitator, note taker

**During the meeting:**
- Be present – and ask everyone to eliminate their distractions
- Use video camera if possible – easier to stay present & interact “in person”
- Start with introductions – put a voice to the name
- Begin with a review of the purpose and agenda
- Keep meeting interactive and discussion oriented
- Call on people by name to answer questions or provide feedback
- Manage the conversational flow and call on reluctant participants
- Use the chat functionality to check for questions
- Take notes – key points, decisions, next steps
- Recap actions, assignments and next steps at end of meeting
Focus & Results

Managing the work and outcomes:

- What are the team working on right now?
- How does this align with your new priorities?
- Do your team understand the new plan of action?
- Are you addressing issues daily?
- Are risks reviewed frequently?
- Is the schedule realistic?
- Are decisions logged and managed?
- Is the work clearly assigned?
Bonus Question

What do you want to be or to be known for at the end of this crisis?

What do you want your team to be or to be known for at the end of this crisis?
Your Action Plan

- Identify top action to complete in next 1-2 days – what is your key bottleneck or highest risk area?
- Prioritize top 3 actions to complete in next 7 days
- Are there any assignments that can be delegated to your team?
- What one team or process change could you make this week?
- What needs to be reset?
Feedback & Questions
THANK YOU!

Let’s Connect:

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