

# Cultivating collaboration when managing projects

Successful project outcomes depend as much on relationships as technical skills. How can marketers get the most from collaborating with fee-earners and others in the firm?



By Michelle Daniels, Jill Pett & Sarah Boddy

**N**early all marketing or business development projects in the professional services require a degree of collaboration.

Whether it is to drive the latest client care or cross-selling initiative, raise the profile of a firm in some way or reach out and attract new clients – invariable marketing, business development and fee-earners will need to collaborate in some way.

Often marketing and/or business development (BD) professionals are called on to drive these projects to a successful conclusion. In doing so, success typically depends on how they impress and motivate individual fee-earners, practice areas or departments to support the project. Each fee-earner brings to the project their own agenda, motivations and scepticism. It's no wonder that many projects either take far longer to complete than originally anticipated, or struggle to get off the ground altogether.

## THE IMPORTANCE OF THE H-FACTOR IN PROJECT MANAGEMENT

In working in professional services organisations over the years, we've come to realise you can never underestimate how big an obstacle 'human nature' is. Many business

services personnel from all disciplines (HR, BD, IT, Finance, etc) have struggled to manage a project because the human factor or 'H-factor' often throws in challenges. This is not surprising when you factor in all the different people that may have a bearing on a project's success. Aside from the target audience of the project, a project manager is likely to have to understand, motivate and satisfy individuals in these four groups:

- Fans – Those pushing for the project's results
- Allies – Those people who may be influential in helping the project to succeed
- Spectators – Those people who are yet undecided whether to support the project and will be watching its implementation from the sidelines in order to make their decision
- The Opposition – Those against the project for whatever reason

So a key step in managing a project in the professional services is to map out the different groups of people who could a) help it succeed, b) be influential in getting it to the finishing line, c) still need to be convinced and finally d) be a real obstacle to its progress.

You will need to work with all four groups (as well as the project's target audience), but by trying to assess who falls into what camp, you'll have started adapting your approach to secure each group's buy-in. However, before we look further into this, let's just take a look at you – the project manager.

## ARE YOU UP TO THE TASK?

We came across this overview from Stanley Portny on what makes a great project

manager. It helps define both the skills and mindset a good project manager needs to possess in ensuring a project succeeds in its implementation. Portny says that great project managers:

- Are 'why?' people
- Are 'can do' people
- Say what they mean and mean what they say
- Tend to view people as allies, not adversaries
- Respect other people
- Think big picture
- Think detail
- Assume cautiously
- Acknowledge good performance
- Act as both manager and a leader

It's interesting that most of these relate to 'people' skills, rather than a scientific knowledge of project management processes, techniques and analytics. That's not to say the latter aren't important but, when you're trying to drive a project in the professional services, your 'people' skills will be essential and shouldn't be underestimated.

## KEEP THE GOAL IN SIGHT

Whatever size and scope of the project – from managing a mail shot through to planning a merger – it's important to be clear about what you want to achieve and the business benefits of achieving it. The goal or objective will need to guide everyone through the ups and downs of the project's implementation. If the goal isn't clear a project can easily divert off course and the project team lose heart.

Further, goals should be realistic and achievable. If there is a large target that will take some time to complete, consider

## Marketing basics

breaking it down into smaller ones that people can achieve quickly. This often spurs them on to the next step, rather than floundering away at an objective which isn't going to be realised for several months.

Once the goal is established, it is important that communication is clear so that all the people involved understand it. Beware that people will project different views and interests on a target – perhaps distorting it in their minds to satisfy a personal goal or interest. A trick for clear communication is to use different communication channels for different groups – playing to the ones each group favours and explaining the goal in their terms and language. If you can articulate what the end result will look and feel like, people will be more likely to understand and support the project. You can only do this, however, by taking time out to understand them and knowing which elements of the project will be more appealing to them.

### GETTING FROM A TO B

Then it's a case of putting together a plan that will lead to the goal being achieved. Sometimes this will involve providing a process for people to follow and breaking down components of the project into manageable steps. These have to be manageable both from the perspective of the people implementing them and also from your view as project leader. Giving each step a realistic timeframe and making deadlines count will help here. If a particular deadline does slip, others invariably will follow so set them wisely.

Project management in the professional services environment will require you to facilitate people in the project's implementation. This may require you to:

- bring individuals together as part of a team
- motivate people to collaborate and undertake the tasks they're set
- come up with ideas, solutions or ways round an obstacle
- challenge ideas in order to find the best possible outcome.

To be successful, you will need to develop a deep understanding of the people involved and affected by this project. You can do this by taking time out to find out their concerns, their workloads, their progress on the project's implementation, etc. Yes there

will be some people you can just leave to it and they'll complete their part of the project in the agreed timescale. More often than not though, your project will be just one of a myriad of things they have to undertake as part of their working week. So keep in touch, check progress and help people to integrate the tasks into whatever time management device/task list they use on a daily basis, be it a Blackberry, diary, to do list, etc.

From our experience (and from other's we've worked with), take time to listen and double-check actions have been undertaken, working diplomatically to overcome resistance or concerns. If you have reached an obstacle in your project, then stop, elicit the concerns people have and resolve them before trying to charge on.

One marketing director gave us a valuable piece of advice when it came to identifying the real reason for a fee-earner's resistance: "If they won't tell you their concerns about a project, ask their fellow fee-earners, partners or colleagues. They invariably know the cause and with that information you've got a greater chance of solving the issues".

You may find that the cause of the concern is something very small indeed, however, it's always wise to invest time to solve it. Left untouched it is incredible how just a small issue can metamorphose into a major obstacle.

Another tip to help your facilitation of the project is to think very carefully about the members of your implementation team. Play to strengths as much as you can, but do ensure that influential people – both positive and negative – are involved.

### RISK ASSESSMENT, MEASUREMENT AND MANAGEMENT

During the project's planning phase, and also periodically throughout its implementation, it's good to weigh up potential obstacles and challenges that may crop up. In doing so, your project team needs to try and think through alternative courses of action that could keep things on track. You won't always be able to anticipate all the risks, but if you build review time into your project plan, you've more chance of anticipating sudden changes. If things have changed, then adapt your plan to the new situation rather than ditch it. If you still want to achieve your goal, consider alternative steps that will get you

there and adjust your timeframes and actions accordingly. This means allowing for a degree of flexibility, but still being focused on the target goal.

### MAINTAIN MOTIVATION

The more motivated people are, the more they'll want to complete the next steps in a project's implementation. Motivation may come through simply communicating progress and keeping everyone 'in the loop' on how things are doing. In other cases, it might be good to give people a token 'pat on the back', a mini-rewards or celebration to acknowledge the achievement of a key stage goal or target.

### SUMMARY

In a professional services environment every project is unique – with different variables in terms of goal, timeframe, activities and of course the people involved. Whilst certain project management techniques can really help to get a plan from A to B, it's often collaboration and overcoming the 'H Factor' that will be paramount to the project's success. If you've been set with project-managing a marketing or BD project, ensure you:

- recognise the influence different groups (in and outside of the firm) will have on the project's success
- take time out to understand those people
- create a sequence of activities that can be built into everything else they have to do, and which they're motivated to undertake
- communicate, involve, motivate and reassure people to complete those activities
- develop the 'people' skills needed to drive the project.

### Date for your diary

Michelle, Jill and Sarah originally ran a workshop on this topic at the PM Forum's 2009 conference.

This year's conference will take place on **Wednesday 22 September** in London.

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