Lucid Thought

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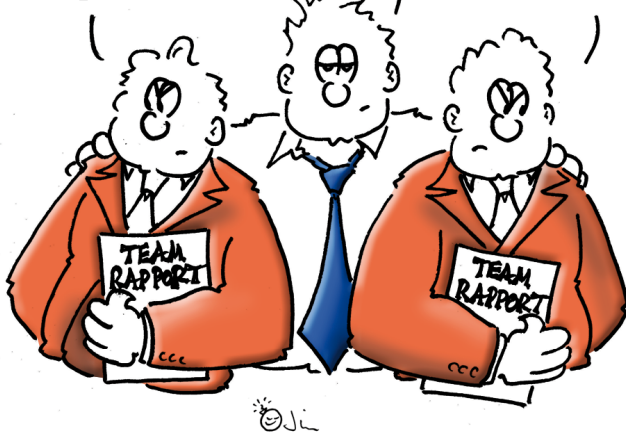
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T H O U G H T

{ **Quality measures for Engagement Products: possible or pointless?**

"Developing our indicators has resolved all our key engagement issues… except which team biscuits to buy…"

"Digestives!"   *"Hob-nobs!"*

In last month's Lucid Thought we outlined our belief that one way to embrace the necessary human and organisational competences in projects is to consider 'products' (deliverables) that relate not just to the technical or managerial scope but also address the engagement of the team and wider stakeholders.

A potential and significant enhancement to the PRINCE2® method and the technique called Product-Based Planning, is to describe and 'test' Engagement Products. Engagement Products are those that are fundamental to enabling the collaboration essential for successful delivery.

In this Lucid Thought we develop this idea to suggest indicators that would be part of the planning and assessment of the quality achieved for each Engagement Product. These indicators, alongside similar quality measures for specialist and management products would be used at stage gates and other key decision points to verify whether the project was proceeding in the best possible way. Our key question in posing this idea is whether the extension of Product-Based Planning to include Engagement Products is an approach that could be implemented practically.

Key to this argument is whether indeed engagement on projects can be measured, or be represented sufficiently by observable indicators.

It seems to us that there are two types of indicator that could be developed. The first type of indicator is easy to describe, easy to observe, but falls some way short of indicating the actual behaviours necessary to deliver the Engagement Product, e.g. 'regular project reviews take place between the core team and user representatives'. The second type of indicator describes the behaviours necessary more fully, but these are more difficult to evidence, e.g. 'user representatives are appointed, briefed and work collaboratively with the core te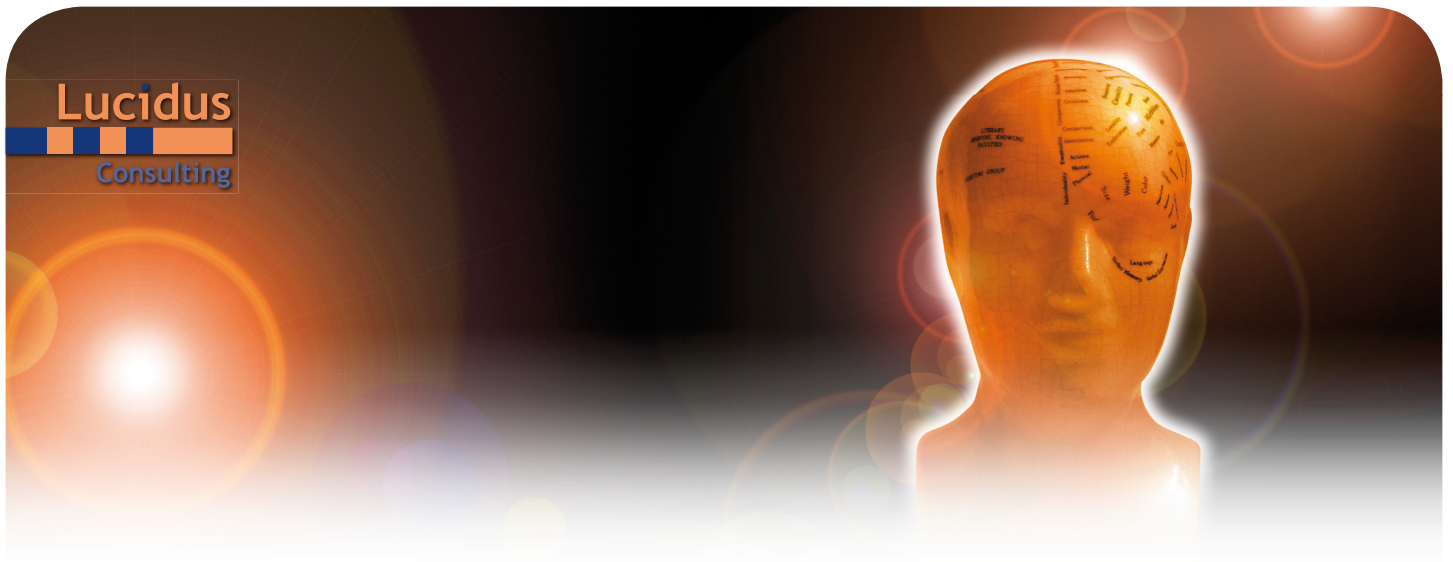am to enable close user alignment with the project'. That project reviews take place is a good thing and goes one small step towards providing the context within which engagement can occur. But does this sort of indicator go far enough to be useful?

With this difficulty clearly in mind, the table below shows examples of Engagement Products (the first two columns repeated from our earlier Lucid Thought), but this time extended to suggest indicators that might be useful in ensuring that project scope associated with human interaction is given the same priority as scope for specialist or management deliverables. The verification process required is clearly more 'human' and less tangible than for some technical deliverables, but this is not dissimilar to the challenge in assessing the quality of many management products, such as the fitness for purpose of a business case, project plan or risk register.

Example Engagement Product	High Level Product Description	Potential Measures/Indicators
Stakeholder interests accommodated	**Communication has taken place ensuring that all stakeholders' interests have been appreciated, and accommodated/reconciled.**	• A complete and current stakeholder analysis is in place. • Communication plans are in place that address directly the stakeholder analysis. • Review with stakeholders reveals a common understanding of what the project will achieve.
Sponsoring group committed	**There is confidence in the project's purpose and approach plus a commitment to deliver the business case from within the group of senior sponsors.**	• A sponsoring group is in place and meets regularly. • The documented business case clearly shows how different senior sponsors' needs will be dealt with. • The sponsor is empowered to make decisions on behalf of the sponsoring group.
Core team has rapport	**Rapport has been established between all members of the core project team. There is evidence of openness, sincerity, respect and a desire to build understanding and relationships within the team.**	• Review with team members reveals a common understanding of the project, its opportunities and challenges. • Review reveals that the core team are in frequent contact and working well together. • Team members report a challenging team culture where debate is encouraged, creative solutions to problems are found and where there is trust and good-will but not complacency.
Users bought-in	**Users know what success for the project and business looks like and the part they must play to achieve it. They know how they will work together with the core project team to enable innovation and improvement.**	• User representatives are appointed, briefed and work closely with the project manager and the core team. • Users representatives report a challenging team culture where their needs are understood and where there is a focus on innovation and improvement as well as delivery. • Users are involved in monitoring and signing off deliverables at each stage.
Team participating	**The pace of the project is sustained across the core and wider team and there is evidence of individual and team drive and a 'can-do' mentality in achieving plans and revising plans as necessary to accommodate risks and issues.**	• Review with team members reveals a drive and commitment to achieving the best possible outcome from the project for the organisation. • Review of team communication channels shows that all participate and contribute their views on risks, progress and issues to be resolved. • Changes to plans are well thought through and justified in terms of business benefit.
Users ready	**Users are ready to accept the outcomes of the project and are committed to using them to achieve the project's benefits. Their issues have been understood and addressed.**	• Review reveals that users are familiar with new arrangements and are prepared to adopt and exploit project benefits. • User representatives report that they are fully briefed and ready to implement.
Business learning captured	**Lessons from the project have been explored and captured and there is evidence that the learning has been embraced by the professional community.**	• Lessons learned are made explicit and communicated to the professional community. • Improvements to process, procedures, tools, training, risk prompt-lists and other project collateral are made as a result of lessons learned. • Review reveals that leaders across the professional community understand and have embraced organisational learning through their amended behaviour.

Note: it is not suggested that once these products have been achieved then no further attention is required. They need to be maintained as necessary in the same way as other products, for example the business case, user requirements document or risk register.

So can an approach like this work? The pros and cons from our perspective are as follows:

Advantages

- *Promotes careful attention to human and organisational matters in planning and at key decision points.*
- *Process is in place at every stage gate to identify weaknesses and to progression if key things are missing.*
- *Provides an approach that goes some way to promoting improvement and verifying the quality of engagement as conducted in the project.*

Challenges

- *Potentially, relegates complex human and organisational matters to a 'tick-box' approach - making complex social matters seem appear prescriptive.*
- *Detracts attention away from a continual focus on human and organisational matters throughout the project.*
- *Indicators become 'perverse measures' driving inappropriate behaviours.*

We have had a healthy debate within our team as to whether this approach is possible - because it takes a practical step forward to put human issues on the core planning and control agenda; or whether the approach is pointless - because it's just not that simple, and treating it simply loses the essential message.

As always we are interested to hear your views.

This Lucid Thought has been written in conjunction with Martin Price and Lisa Talifero of EngagementWorks.