



“Under promise and over deliver!” - Three keys to keep this golden rule intact

Recently, I have had several clients contact me requesting assistance with issues involving Capital project planning, management, and delivery. In most cases, these clients are from communities that have the needed resources to construct the projects they want to deliver. However, they all are experiencing project delivery issues including a), previously committed to providing projects within a certain timeline, scope, and budget that are no longer feasible; or b), they lack the proper staff, polices, processes, and tools to effectively manage projects and communicate changes to their stakeholders.

Given time and lack of attention, these issues will compound and ultimately break the service strategy golden rule of “under promise and over deliver!” Once this happens, a wicked and sometimes out of control environment develops due to project status uncertainty and delivery concerns among elected officials, the community, and media. That environment also typically causes staff to become overwhelmed and demotivated due to mounting public pressure and political criticism to immediately correct the issues and provide results.

So, what are the keys you can utilize to help ensure you and your team are able to keep your projects on track and the golden rule intact?

Key 1 – Effective project planning, scoping, and estimating: In my 30-plus years of planning for transportation and other Capital projects, I’ve learned to be very diligent in my initial review of a project. That due diligence includes paying attention to the details of each project, its phases, and doing my best to ensure that all known project issues are identified up front and before any initial project timeline and cost estimate is compiled or communicated to the public. In addition, I also incorporate reasonable time and cost contingencies within each project and provide project file notes to document my initial project assumptions and conditions that need to be present for the project to reasonably advance as estimated (i.e., I typically provide notes on project funding availability, unknowns of environmental review findings, lack of control over permitting agencies and utility companies, etc.).

Key 2 – Effective project management and monitoring tools: Once you’ve been given the green light to advance a project from planning to design, construction, and implementation, it’s imperative that you update your initial estimates and develop an effective project management plan. This plan should be comprehensive in nature and at a minimum include the following features:

- List the project sponsor and their contact information (this is typically a Department Director);
- List the project manager and their contact information;
- List who is responsible for executing certain parts of the project and their contact information (these are the project team members);

The project plan should also provide a flow chart listing all project activities to be completed, completion dates for the activities and project milestones, and the responsible party to execute the work. It should also identify and define all known project risks and provide clear direction to the team on how to deal with risk issues when they develop (which they will!)



In addition to the project management plan, the project manager and team will also need to determine what tools they will need to most effectively monitor and carry out the project, determine how to obtain the tools if they don't exist, and determine what type information they will need to provide to various stakeholders to keep them informed on project status, budget, and outstanding issues.

Key 3 – Effective project communications and reporting: So here comes the BIG key, effective and on-going project communications and reporting is essential to keeping the golden rule intact throughout the life of a project. While it's often time consuming and resource intensive to do and while it's never fun to have to communicate project issues or changes to your Board or community, at the end of the day you and your team are responsible for the project and accountable for its delivery. It's always far more beneficial (and less painful) to be proactive with your communications versus reactive. This means that the project team needs to develop and have effective communications protocols and tools at its disposal to keep all stakeholders informed. Good basic communications tools include:

- Develop and maintain an updated, simple to read and understand, project management status sheet for each project;
- Implement an effective project management system that's easy to use, update, and maintain by staff (and capable of being shared on line as needed);
- Provide periodic email updates (or social media updates) to stakeholders on project status and changes;
- Ensure good processes are in place to quickly react to and communicate the results of any identified project issues or changes that impact the project.

Other important and helpful items to consider include having enough experienced and qualified staff on hand to timely perform and execute all required project work and reviews and, having the right kind of organizational structure, policies, processes, and practices in place to promote effective and efficient project management oversight and delivery systems operations. Finally, also consider providing personalized project team support elements on your projects. Things like recognizing team members when completing specific tasks and work activities, promptly meeting with them to discuss and resolve any outstanding project issues and, celebrating project milestones all let them know you how much you value and appreciate their contributions, have their backs when needed, and will serve to motivate them and instill a sense of teamwork, pride, and satisfaction in the work they do on the project and for your community. Please feel free to call or email me to learn more.

Jim Westmoreland, PE

Retired City Manager, City of Greensboro

Managing Principal, Westmoreland Strategic Enterprises, LLC

jwestmoreland@westmorelandstrategicenterprises.com

www.westmorelandstrategicenterprises.com

(336) 420-4411