



by Linda Miller of Traveling Coaches, Inc.

::Project Managers and Vendors

Creating a Successful Partnership

Project management offices (PMOs) and project managers (PMs) are a necessity in today's law firms, to ensure that IT projects stay on track. Anyone acting as a PM on a project requiring multiple outside vendors knows that if not managed properly, chaos can reign. Working with your own staff on a project can usually be orchestrated with ease, but throw in a vendor or two (or more) and the project can quickly get out of hand. Creating a successful partnership between vendors and your own project team is a necessity to ensure project success.

Resource Allocation

Resource management can be the most frustrating part of a project manager's job, especially when considering the "ambush" projects that often appear from nowhere. The number of projects that an IT department takes on in a year often justifies the need for additional resources to support and enhance internal project teams. The complexity of a project may also determine the need to augment the staff's technical expertise or resources. Investment in a vendor who serves as an extension to the IT staff can be justified by quicker project completion, a reduction in IT staff burn-out and a more efficient project deployment.

Expertise in New Technology

With new technology being introduced every day, it is difficult for IT departments to master all the technological requirements that their clients demand. Most IT departments have experts on staff to manage their everyday legal applications and core technology, but outside resources may be necessary to assist with new technology. Vendors who are trained and certified in the latest technology can provide the expertise needed for a project rollout.

Experience in the Field

The vendor brings experience with other clients and similar projects and can assist the project manager in avoiding some of the common obstacles to a smooth rollout. Vendors also bring knowledge of best practices in project rollouts and a proven record of success.

Consultation

Firms may employ a vendor as a consultant to review their project plans. If a firm is comfortable with the technology and feels that the IT

department can accomplish the project in-house, the firm may employ a consultant just to confirm that the team has not missed anything. The vendor may consult with the project team and make recommendations to tighten the plan or to confirm that they are on target. This not only ensures that nothing has been overlooked in the project plan, it also boosts the firm's confidence that the plan is valid.

A Win/Win Mentality

If your vendor has a good working partnership with the manufacturer of a product they are using or implementing in your project, you may want to let the vendor act as liaison between that manufacturer and your firm. In this case, the vendor may be better positioned than your internal staff to successfully escalate issues and get answers.

The vendor's goal is to make the IT department's project successful with a solid and proven technological rollout. If the project is successful, then the stakeholders, IT department and the vendor all benefit.

Regardless of the size of the PMO staff, all firms reach out to vendors at one time or another to augment their knowledge or their resource pool.

Choosing the Vendor That's Right for You

Once it has been identified that external resources are necessary, the search begins. When selecting a vendor, consider the following:

Expertise and reputation

Local versus nonlocal

"Partnership" mentality

Look for a vendor with technology/application expertise (certifications) that fit your project needs. Research the vendor's reputation by networking with other firms who are using vendors and who have successfully deployed the same technology. Research listservs to find reputable vendors with successful law firm experience in the project technology you are deploying. If the firm has a technology consultant, ask for his or her recommendations. Ask vendors to present their expertise to you. Each should provide a proposal for work based on the project scope provided by the law firm.

In a perfect world, firms want a vendor with whom they have an established working relationship or partnership, one that understands the firm's environment and personalities, has the required skills and expertise to perform the project successfully and is local. However, if the expertise cannot be found locally, it is more cost-effective and critical to project success to bring in an expert rather than hope the local vendor can get up to speed. IT departments should identify the best vendor(s) for the project and develop a partnership mentality regardless of the vendor selected.

Contracts, Role Definitions and Clear Expectations

After vendors are selected, a contract should be drawn up that clearly outlines the expectations and assumptions set in the negotiation phase to limit surprises during the project for either the firm or the vendor. Vendors should be prepared to deliver requirements outlined in the statement of work (SOW).

Historically, successful project engagements are ones where the firm and vendor work together as a project team. Expectations for vendor participation in the PM process may vary, and it is wise to invite the vendor PM to help compose the project plan. Require deliverables from the vendor such as a list of identifiable risks and a project plan or task list that includes predecessors for each task. Merge this information with the firm's overall project plan. The vendor should work with the firm's PM to review the overall project plan to ensure that all predecessors are in place and that resources are aligned correctly. Clearly establish the role of the vendor in regard to the project management methodology in place; this is especially critical when working with more than one vendor. Confirm the vendors' understanding of their respective roles by asking them to repeat their functions in the project. What they heard may not be what you said.

If working with multiple vendors, define to whom they should bring their questions and concerns and establish a liaison between the vendors and the firm. This liaison is typically the project leader or manager in the law firm. Some vendors are competitors, so set the expectation that all project participants will behave ethically and in a spirit of camaraderie and teamwork.

A Successful Partnership = A Successful Project

The ability and willingness of a PM to run the project and coordinate with the vendor in a partnership relationship is a critical project success factor. The firm's PM understands the firm's methodology, tolerances and personalities, and the vendor PM understands the technology and the flow. The outlook of the law firm PM should be to listen and take advantage of the vendor's expertise to ensure the firm gets the most out of the project experience. In a nutshell, a successful partnership is based on communication.

Communicate, Communicate, Communicate!

Some people love meetings; some hate them; some are stressed or just plain ornery; and many have different ways of processing information. Learning how your internal project team members communicate and dealing with them as a PM can be quite a challenge. Add external resources that you may not have worked with before, and that challenge becomes even bigger. Successful project managers are skilled at bringing project management to skeptical, reluctant or time-

strapped teams and making it work for them. Key to their success is having a good communication plan for working with internal staff and/or external resources.

Start with a Plan

Project managers must be good communicators, detail-oriented and organized. Project plans must flow, and team efforts must be coordinated. Roles and responsibilities need to be laid out and enforced from the beginning of the project. Informal and formal communication are required to keep everyone headed in the right direction and on schedule. Follow-up on task details and resource allocation is a required process and must be organized at the start.

A communication plan should include scheduled meetings between the firm PM and the vendor PM. It should outline the expectations of these meetings. Items to be discussed will typically include:

Tasks that have been accomplished since the last meeting

Issues that have been identified

Status of incomplete tasks

Vendor budget status information

Action items

The communication plan should also include schedules indicating when the project leaders will meet formally with their project teams. The project leaders will report back to the PM on progress, issues, risks and accomplishments.

Launch the Project

Good, clear communication is vital to every person on the project team, and the PM should ensure that each team member understands the project and communication plans at the outset. Delays and problems most often result from a lack of communication (unclear project goals, understated project scope, etc.) A project kickoff meeting makes sure everyone is aligned and informed about project expectations, schedules and processes. It is important that all project team members attend the kickoff meeting so the same message is heard by all. Kickoff meetings are critical to introduce the teams, establish roles, explain the "why" of the project and clarify the definition of project success as established by the stakeholders.

Keep Everyone in the Loop

The PM should provide the project strategy manager (typically the IT director, CIO or COO) frequent condensed reports on the status of the project. The strategy manager will then communicate the project status back to the stakeholders. Use a status color code (red, yellow, green) at the top on the status report for easy reference. Red is for critical project status (needs attention), yellow is for caution (the project could be progressing to a critical state if not put back on track), and green is for progressing as planned. Even the most experienced PM may find it challenging to discuss an issue that has his or her superior worried. A written status report makes communication more concise and productive by focusing on the "pain point," outlining how this critical issue is being handled and providing the steps required to resolve problem issues.

Communicate Informally

Informal communication should be frequent and brief. Hold impromptu meetings with the project team including project managers, project leaders and external resources. These meetings should cover the project status and address concerns, as well as share successes. The findings from these meetings should be presented in formal communication. Project leaders need to be experts in their project scope (application) and have the leadership skills necessary to put formal processes in place. They should report completed tasks, issues, potential risks, scope creep and other issues back to the PM.

Communicate Formally

Formal communication efforts are recurring meetings to discuss issue management, change management, action items, risks, timelines, budget, scope and tasks. The firm PM should invite the vendor PM and appropriate project leaders to participate in the weekly meetings. The meetings should be a part of the project plan, and the appropriate resources should be allocated to attend. All formal communication should include an agenda with status reports of action items from previous meetings and issues raised in the informal meetings. Minutes are taken during the formal meeting and distributed to the project team and the PM. Meeting minutes are very important and provide valuable records, reminders, and food for thought regarding the lessons learned as the project closes out.

Schedule Project Financial Reviews

Develop a financial review meeting schedule with the vendor. The project manager should require the vendor to submit timely information including budgeted versus actual hours used to date and hours (costs) remaining on the project. This information is necessary to know if the project is going to stay within budget and allows the PM to be proactive and make necessary changes as the project progresses.

Communicate Difficult Issues

Although a team should strive to resolve as many issues and conflicts internally as possible, some issues can be serious enough to need attention from people outside the team, including upper management. Typical situations requiring escalation include: conflicting resource demands threatening project staffing; group dependencies not being met; project scope disagreements; and any issues with functionality of the project's deliverables, especially as the project nears completion. Defining escalation procedures early on helps everyone know how large issues will be resolved and what role they will be required to play. This process should be defined in the communication plan and explained in the kickoff meeting.

It is sometimes difficult for IT management to hear feedback from a vendor that prior IT decisions could be impeding the technology they put in place, or perhaps the skill set of their staff is not a strong resource on the project. However, the vendor is an extension of the firm's IT staff during a project and their expertise and opinions should be heard and respected. Open discussions should be allowed and defined as acceptable at the beginning of the project. These discussions require some level of diplomacy and thick skin. Both parties, firm and vendor, should be open to constructive criticism delivered in a professional manner to ensure the success of the project. Learn to work with difficult personalities and realize that the firm and vendor should be striving for the same goal, a successful project.

The firm's PM is ultimately held responsible for the project's success or failure. The project team should assist the PM in achieving success, keeping their eyes and ears open and being respectful to feedback from peers and vendors. The PM knows the firm's temperament and the level of patience, and he/she knows best how the firm will respond. The PM should listen openly for resolutions that will work in the environment.

Confirm Project Completion and Vendor Release

When is a project complete? Taking the time to be very explicit about the criteria for project completion can help avoid being blindsided by late surprises. The criteria should also be outlined in the communication plan. A user acceptance test (UAT) from the law firm and the vendor perspective should be in the project plan to ensure that both parties are satisfied that the project deliverables are acceptable. Completion criteria are tools for communication and an important aspect of "quality management" on a project. The team needs to agree on when a particular activity or phase is completed.

When the project is complete, a formal, written release from the firm to the vendor should be prepared and signed by the PM. This release should confirm that the firm is satisfied with the vendor services and that all deliverables have been accepted and are successful. At this point, the vendor is released from the project. The vendor should then schedule a wrap-up meeting with the firm to review lessons learned, accomplishments well done and the overall budget.

Wrap It Up and Celebrate Success

At the outset of a project, stakeholders must agree to a definition of success and the metrics by which that success will be measured. If all goes according to plan, it's now time to celebrate.

Once all the system documentation is provided from the vendor, all invoices have been presented and budget confirmed and all users have had sufficient time to use the product, the PM should conduct a closure or wrap-up meeting with the project team. The PM uses this opportunity to gain feedback from the project team on lessons learned and to unveil the successes of the project by each team member. Don't rush this meeting; allow plenty of time. Feedback identifying project strengths and weaknesses should be presented in a positive and constructive manner. Awards or verbal recognition may be given to the project team.

There is no cookie-cutter approach to a project celebration. Some pat the team on the back and say, "Good job! Now let's get started on the next project." Some have a happy hour or celebratory dinner for the entire project team (including vendors). Some have praiseworthy memos sent out to the appropriate chain of command with the project team copied. Some do all of the above. Whatever the process, be sure to give the appropriate pat on the back to the project team to recognize that their hard work and diligence made success a reality and to encourage success on future projects.

And give yourself a pat on the back for communicating well, keeping an open mind, organizing and managing the project while forming a partnership with your vendor that led to a successful project outcome!

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