Chapter 1

Mastering the Business-Oriented Approach

''The business of business is business.''
— Milton Friedman

Exchange Server 2007 is the latest release of the most commonly used corporate email platform, and represents, according to many in the industry, the future direction of not only email but also business communications. By the end of 2008, industry projections are that 50 percent of organizations that use Exchange will move to Exchange Server 2007.

From a purely technological point of view, Exchange Server 2007 is one more step in the natural evolution of email. Its adoption and implementation by companies that want to keep up and maintain their competitive advantage and market share, as well as leveraging the promise of unified business communications, seems obvious and inevitable for the technologically oriented person.

Taking full advantage of Exchange Server 2007's new features and its many improvements over Exchange Server 2003 is going to require a substantial investment. Unlike previous upgrades, Exchange Server 2007 requires the complete replacement of existing 32 bit servers with 64 bit hardware and software, in effect rendering previous investments valueless, while demanding a steep infusion of new capital.

In addition, new options for server roles and high availability will require many organizations to rearchitect their entire Exchange environment — a task that will be expensive to implement in most enterprises. There are also the inevitable concerns about whether there are going to be additional needs for security, high-availability, archiving, and compliance features that are business- and industry-specific and that Exchange Server 2007 can't provide.

To the business-oriented person, purchasing and implementing Exchange Server 2007 isn't quite so inevitable. The price tag is steep, the benefits are not always clear, and the value of most features is somewhat hazy. They're not really sure that this is a good idea and resist until someone can show them otherwise.

Too often IT personnel can respond to these business-based questions with only a blank stare. Too often IT personnel show a marked lack of ability to operate within the business environment. They might even resent the managers and other nontechnical business personnel as mere ''bean counters.'' By comparison, the rest of the organization might see the IT staff as ''geeks'' or outsiders. It's clearly not the best of both worlds.

What to do?

This book casts you in the role of an IT project manager responsible for creating and implementing an Exchange Server 2007–based messaging system. To be successful, you'll have to learn to straddle the divide between ''geeks'' and ''bean counters.''

To do that, you'll have to understand the business-oriented approach to IT.

The Past as Prologue

The role of IT in the business environment started off humbly enough. In most companies, today's IT manager was ''the computer guy'' of yesterday, pocket protector and all. Back in the 1970s and into the 1980s, these future managers were typically rulers of backroom fiefdoms that were rarely concerned with business decisions and objectives, and the business rarely involved itself with them other than as a necessary expense like company vehicles, medical insurance, or typewriters.

The early IT centers were called ''data processing centers,'' and their principal task and primary value to the organization was their ability to automate transactions. The smart companies that were successful understood that information about transactions would be as valuable as the physical goods themselves.

Data processing soon evolved to management information systems/services (MIS), as companies realized that someone actually needed to manage their burgeoning computerized underbellies. MIS eventually shrunk to just IS (although the dual meaning — information services and information systems — remained).

Expectations for IT rocketed in the mid-to-late 1990s as large enterprises spent millions on massive implementations. IT budgets grew by leaps and bounds, and money was spent by the barrelful without much question. There wasn't even much oversight or concern about wastage. IT budgets and expenses became as profligate as that of the Department of Defense with about as much accountability.

There were a number of reasons for this. First and foremost was the belief that large IT investments would provide large returns and create major competitive advantage. The seemingly unstoppable and never-ending wave of new hardware and software innovations coming out throughout the 1980s and especially the 1990s fueled that belief. IT and computers were here to stay, went the reasoning, and business's faith in its IT staff and their solutions was unshakable and blind.

Computerization and its widespread adoption revolutionized the nature of work and contributed dramatically to the boom of the world economy throughout the 1990s. Many things that were unthinkable were suddenly doable.

NOTE

This book, for example, was written over the past few months in Saudi Arabia, New York, Connecticut, and the outskirts of Petra; transmitted to California; edited and reviewed there; and put into production in New Jersey. Reviewers were scattered all over the world, including the Isle of Man, Malta, Indiana, and elsewhere. Globe-reaching collaboration of this type would never have been possible without IT.

Then the tide that had raised all the boats rushed back out.

First, there was the hype about Y2K and its associated impending disasters — which turned out to be a nonevent. Eyebrows were raised, and there was the sudden sense that perhaps the emperor had no clothes. Dot-coms boomed and then busted and the NASDAQ went into free fall. Hardware and software innovation slowed. The security — or rather lack of it — of databases and systems was embarrassingly and frighteningly highlighted as virus and Trojan onslaughts brought businesses to their knees. Even mighty Microsoft itself was humbled by the Slammer worm assault on its servers. The emergence of outsourcing, and then offshoring, undercut IT's organizational ability to take advantage of new web-enabled technologies because it had thinned out the ranks of its programming and application development staffs. It was ''a perfect storm'' that led to a deep and widespread dissatisfaction with enterprise IT.

In boardrooms across the country, IT's budget, technology investments, and basic worth were being questioned. The value of IT was suddenly a topic for debate. Every system, every application, and every IT project once labeled mission critical were put under the microscope and, in many cases, found wanting and too expensive. Business's belief that ''We can't do anything without IT'' quickly changed to ''How much can we do without IT?'' An article by Nicholas Carr appeared in the May 2003 *Harvard Business Review*, titled ''IT Doesn't Matter,'' followed by his book the following year, *Does IT Matter?* His answer was a resounding ''no.''

In the past few years, a new model has emerged for the successful IT manager. The IT manager has to straddle both worlds and approach IT as something that brings value to the business; he or she has to be prepared to answer the questions ''Why should we do this? What's the business reason? Where is the business value?''

THE NATURAL HISTORY OF THE COMPUTER

Over the centuries, technological innovation has spawned changes in how and where people live, play, work, and provide for their families. The late Harvard Business School professor Jai Jaikumar described how fire, the wheel, the lathe, the steamboat, the locomotive, the automobile, the telephone, and the airplane were transformational inventions. But his research shows that societies generally took 30 to 40 years to understand the possibilities of these inventions and leverage their use.

In the early 1980s, Jaikumar described the invention of the computer as a transformational technology. He predicted that the computer would go through infancy, a childhood, and an adolescence before eventually reaching maturity. He estimated that this cycle would take a full human generation.

If Jaikumar was correct, as it seems he was, then the computer age is now leaving its adolescence and will enter adulthood during this decade. That will require a new attitude and approach.

Understanding Business Value

Very often, when I speak to IT and non-IT personnel, I am struck at how references to ''the business'' usually exclude IT and technology teams. The two are seen as separate entities and IT is somehow not part of the business. It's a peculiar perception since technology is basically a strategic business tool designed to gain market share and advantage. Thankfully this mindset of ''us (tech) vs. them (the business)'' is starting to change in the current business lexicon. The simple reality is that ''the business'' includes IT as integrally as it includes sales, marketing, finance, and human resources in the organization.

To successfully build an Exchange Server 2007–based messaging system or any IT project, you have to promote and understand its value to the business. In your discussion and your design, you must remember that IT is a business enabler, not an entity that exists in a silo. Approval is not automatic, and you must prove your business value.

Let's take a look at some of the ways that IT provides value to a business and why you need to be able to discuss the new messaging system in that context.

A Short Quiz

If you want to add value to your business or organization, be it through an Exchange Server 2007–based messaging system, another IT technology, or something as mundane as changing the company's website design, you need to know what its business is. You may be puzzled at this

statement. ''Of course, I know what my organization's business is all about,'' you may be thinking. ''What a silly comment!''

Indulge me then and see how many of the following questions you can answer:

- What is your company's mission?
- What is its competitive strategy and position?
- What are its sales numbers and profitability?
- Who are the company's key clients?
- Is it publicly or privately held?
- What's its share price and direction?
- What is the company's organizational makeup and who are its key managers?
- What is its history?
- What are its strategic priorities for the coming year?
- How are managers compensated and motivated?

If you've come up with a few blanks, don't worry too much — yet. This business awareness deficiency, sad to say, is very common, if not universal, among many budding managers and consultants.

But you need to change it if that's where you're at. The first reason is that these are important issues to executive and corporate leadership, and if you demonstrate a glaring lack of knowledge about them, then this insufficiency will raise eyebrows. ''How can this guy deliver a solution that contributes to my business without knowing anything about it?'' The second reason is you can't speak to them if you can't speak to them in their language. You must find common ground. What better place then to come together than where you have a vested and personal interest — the company's ability to earn a profit and meet its objectives.

Aligning IT with Business Values

There are any number of white papers, books, and articles on the subject of alignment, making it appear to be an arcane art form practiced by those dabbling in the Dark Arts. I've always wondered why something so simple is made so difficult.

The concept is simple and logical: for any business to be successful, it has to make money. Any activity it undertakes should help promote its revenue production, promote its fundamental mission, and adhere to its goals. In other words, your Exchange Server 2007–based messaging system must contribute to and enhance the business. Every organization has principles, plans, strategies, goals, and values. You must assure first yourself, and then management, that the project will help or support the business's pursuit of these values.

How do you do that? It needn't be difficult.

First, find out what's needed. Ask your internal clients what their needs are and whether your IT organization or project is focused on these issues. For example, make sure that your Exchange Server 2007–based messaging system is going to deliver the communications features that the organization needs, wants, and can afford.

Next, validate your plans. Unless you're perfect (in which case you should be in a different line of work anyway), I'm sure you've been wrong before. Have you ever thought you knew an answer to something but when you asked questions about it discovered that your answer was ''off center'' or completely wrong? If so, then validation is for you as it is for all mortals.

We all have the ability to size up a situation and come up with a technology strategy to address that situation. But, the solutions you and I develop for an issue can be very different. Both solutions may work to resolve the issue, but one of these solutions may be totally inappropriate for the company at the time.

The only way to know this is to develop a specific IT plan, or strategy, that addresses the key technology issues you have identified in the company. The plan needs to identify the issues you are addressing, the IT initiatives you plan to execute and their priority, the benefits expected to achieve, resources required, and the cost of your plan.

NOTE

Chapter 2 will review how to determine business requirements; Chapter 3 will show you how to go about writing a plan for your proposed infrastructure.

Once it is completed, you should present the plan to the senior management team and ask for their validation in at least these areas:

- Does this plan address the company's critical needs?
- Do the initiatives appear to be prioritized appropriately?
- Do they agree with this plan and will they support it fully?

Taking Fiscal Responsibility

At the top of every CEO and business owner's mind is the fact that for every dollar coming in, a portion is going out as a cost. Studying that equation can help you discover ways to save and generate revenue.

As I mentioned earlier, one of the greatest problems is that very often IT staffs do not have a good understanding of how their company makes money or how IT enables the company to make money. This handicaps them badly in the area of ''fiscal responsibility.''

Fiscal responsibility should be considered a critical and mandatory part of any IT project. By fiscal responsibility, I'm not talking about simply slashing costs or exercising a frugality that would make Scrooge McDuck look like a spoiled spendthrift heiress. Fiscal responsibility means the ability to show how IT affects revenues, profits, costs, customer service, sales, manufacturing, and everything else under the business' umbrella. It means talking about and looking at IT entirely in business terms. This is a complete change from the way IT was perceived 20 years ago when it was seen as an expense that was usually resented and almost never fully understood.

To avoid this lack of clarity of what fiscal benefits your project brings to the company, you should do the following:

- Explicitly define the products and services the project will provide. This listing must be comprehensive and at a level of granularity that portrays specific client purchase decisions. It's not sufficient to define high-level categories, which don't portray all the many things IT does within each category. For example, ''email'' is too broad. A full list would distinguish a basic email account, extended storage, and PDA forwarding as three distinct services.
- Define exactly what the budget pays for and how much. For example, you could specify the cost of basic email for everybody, extended storage for only the customer service department, and PDA forwarding only for executives. Additionally, you can summarize the cost by application for each major project, for necessary repairs and patches, and for

discretionary enhancements. Breaking out the budget in such a way makes it clear exactly what IT delivers (and, by implication, what it doesn't).

The final aspect of fiscal responsibility refers right back to the fundamental question: ''Is this IT project (or IT in general, if you prefer a global approach) contributing to business value? If so, how?'' Remember the object of this exercise is to ensure that the enterprise is spending the right amount of money on the project and that the project money is being spent on the right things.

Learning about the Business

Learning how your company does business and makes its money is extremely important to your role as a project manager and to the overall success of your project. You're not going to go through the amount of work it takes to develop a successful plan and conduct a successful implementation so that the project fails or is perceived as a white elephant. You, and your business, want it to be successful.

Another advantage in knowing where the money comes from and where it goes is that you are better able to see opportunities to help the company. You can then use that information to generate new innovations and revenue opportunities. Your focus is better directed toward business goals, and hence your contributions are more valuable and useful. It also helps increase the value of IT to the organization as a whole.

How can you obtain that knowledge? Here are a few suggestions:

- Find copies of the organization's annual reports, stock prospectuses, and any other publication or document you can get that describes its activities. Study them until you are comfortable with what the business is all about.
- Visit financial officers and interview them about the business.
- Try to observe and interact with every level of the business. For example, observe how users use the current messaging system. Can it be improved? Are there new features that you should integrate in your system because they can increase revenue, reduce cost, or improve overall productivity?
- If you have a weak background in business and finance, read books and take classes. Often your company will reimburse you for successful completion of these courses.
- Talk to other successful IT project managers both within and outside the company.
- Read trade journals and magazines.

Following these procedures won't guarantee the success of your project. Only you can do that. It will however help you orient your project toward the business' needs and improve its chances of widespread acceptance and use — the real hallmarks of a successful project.

Real World Scenario

The Runway No One Wanted

Lambert-St. Louis International Airport Runway 11/29 was conceived on the basis of projections made in the 1980s and 1990s that warned of impending strains on the airport and the national air traffic system as a result of predicted growth in traffic at the airport. The $1 billion runway expansion was designed in part to allow for simultaneous operations on parallel runways in bad weather.

Construction began in 1998 and continued even after traffic at the airport declined following the 9/11 attacks, the purchase of Trans World Airlines by American Airlines in April of 2001, and subsequent cuts in flights to the airport by American Airlines in 2003. The project required the relocation of seven major roads and the destruction of approximately 2,000 homes in Bridgeton, Missouri. In addition to providing superfluous extra capacity for flight operations at the airport, use of the runway is shunned by fuel-conscious pilots and airlines because of its distance from the terminals. John Krekeler, one of the airport commissioners, eventually called the project a ''white elephant'' — a rare, expensive possession that is a financial burden to maintain.

The moral to this story is to always make sure that your project and plans are in alignment with business needs. You should always assess changes in the business environment that effect the requirements or even the need for the project.

Working with Nontechnical Managers

You have been named the project manager for your company's Exchange Server 2007–based messaging system because you are technically competent. You may not, at this point in time, fully understand everything there is to know about Exchange Server 2007, but you can learn it in short order and use your technical savvy to execute the project. Along the way, you are going to have to work with nontechnical managers and users. There is no getting around this; it is something you are going to have to do. The quality of your relationship with nontechnical managers is the key to your project's success and your personal job satisfaction.

The key components of a successful relationship with nontechnical management are communication, and setting and meeting expectations.

Ensuring Good Communication

Typically, management, as well as the managers you work with, are principally concerned with whether you (and your team if you have one) can accomplish what they need when they need it. They don't have a large interest in the technical details of what you will need to do. They expect you to know them and figure out how to make it work. It is a good idea to make sure that any deadlines you set for yourself or your team are on the pessimistic side. It is generally better to give pessimistic estimates and surprise people by being early than to disappoint management by being late. Be careful, however; if this is taken to extremes, management and nontechnical managers will start to consider you obstructive. They will also be unable to commit to meeting their own deadlines and may go around you to make things happen.

The people overseeing the project expect you to meet the deadlines they set for you. They do no want to have to deal with complaints relating to you or your team. They want to know that they can delegate things to you and that those things will be accomplished on schedule. Hence, if you won't meet a deadline or accomplish a task, be sure to advise the management team as soon as possible so that they can manage the impact of a slipped schedule.

You will be expected to set direction for the project based on company objectives. If senior management asks you for a status report, they want to know how you are doing meeting the requirements, goals, and deadlines that were set and agreed to. The technical details don't necessarily interest them, only the bottom line. If, on the other hand, they ask you to go into depth on technical points, don't be afraid to drill down to the minutest details. Trust me, if you go too deep they will stop you. Be definite and precise and avoid generalities. You really don't baffle them with BS despite how clever you might think you are, but you do annoy them and mar your reputation.

WARNING

ATTORNEY: Is your appearance here this morning pursuant to a deposition notice which was transmitted to your attorney?

WITNESS: No, this is how I dress when I go to work.

Budget issues should always be discussed and changes or requests justified in terms of how the items will help the company meet its goals or help your project team meet the goals that have been set for it.

Management will need to be kept updated about the large-scale tasks that are being worked on at the time; other managers will need this information so they can update peers and superiors with the correct information. This updating is also important if you want to keep you and your project team from being overburdened with extra work. If management doesn't know what the group is doing and how the resources allocated to it are employed, they may assume that you have excess manpower or material and volunteer you or your team for extra work, to the detriment of the project. So fill out those monthly reports!

Real World Scenario

CONDESCENDING JARGON: HANDMAIDEN OF CONTEMPT

''Yesterday we jury-rigged the Edge Transport Server's Jefferies Tube to increase security by a factor of 12,345,678 killkens.''

You probably wouldn't say that since it doesn't mean anything. But a lot of technical jargon is just gibberish to a nontechnical manager or user. If you're in the habit of saying something like ''the blade server died'' or ''the mailbox store was corrupted'' or ''some idiot applied a patch'' then you're spouting gibberish — but they did catch the word ''idiot.''

As a project manager (this actually applies to any technical person) you need to learn to write and speak language that makes sense to people without being condescending. How do you do that? Simple, put yourself in the shoes of the other person. While you're preparing a message on some aspect of the project, stop and ask yourself, ''What is the user going to think when he reads this message?'' If your answer is ''he'll have no idea what this means'' then rewrite the whole message or portions thereof.

Failing in basic communication leads to a failure for the whole group. When reasonable people in your organization simply don't understand what's being said by the IT group, there is a lack of trust and alignment taking place. ''IT people make me feel stupid'' simply means that the IT group will not be used to their fullest.

It also appears condescending, the handmaiden of contempt. Want to turn someone off completely? Make them feel you think they are beneath you. That's what jargon does.

It also helps to perpetuate the myth that the IT pro is some kind of arrogant, out of touch person. That's not going to help the project or your career.

Knowing the Requirements

A basic expectation nontechnical managers have of technical personnel is that they know the requirements behind the tasks they are performing. In the case of a project such as creating an Exchange Server 2007–based messaging system, this means understanding what the business needs, how the services will be used, how it needs to scale, and so on. This is critical, and Chapter 2 is devoted solely to determining business requirements.

Knowing the requirements and keeping them in front of you as you work helps keep you and your team focused on the specific problem at hand. Management expects you to use the requirements to direct the project so that it meets its goals on time and on budget and at the expected level of quality. Staying focused on the requirements serves as an ongoing guard against scope creep.

Communications with management should be based on the requirements as well. For example, you may be asked why you are doing a task one way rather than another. If you believe that your approach is better than what the other person proposes, use the requirements to express the why of what you're doing. For example, instead of saying ''it's a better design,'' explain which requirements led you to choose this design rather than the other one. Explain how the selected design is easier to support, how it interoperates more efficiently with other services, how it scales to the required size, how it has higher availability, or how it simply has more of the required features. Even if you think you're saying too much don't worry, it's probably information they will appreciate having. Overcommunicating is better than undercommunicating. Showing you know what you are talking about and have thought things through enhances your reputation and standing. That in turn reduces the number of questions you will get in the future. As the project progresses, you will eventually be able to gauge the amount of information that each individual prefers.

Understanding user requirements is a significant part of the project. Finding out what these needs are involves asking the right questions and listening to the answers. Always ask for clarification when necessary. The process of gathering user and business requirements provides you with an opportunity to build a cooperative relationship with users and management. It should also be used as a platform for providing feedback and setting realistic expectations, a topic that is expanded on further in Chapter 8.

Clearly identifying the requirements and using them to direct your work and that of your team will result in faster problem resolution and better services, with happier results for all concerned.

Managing the Project Team

For the purposes of this book, it's not particularly important how you came to be named the person responsible for the development of the new Exchange Server 2007–based messaging system. The assumption is made that you were selected for the role by senior management because it was felt that you were prepared for the role. This may be your first or your fiftieth project.

Except in the case of a small or medium-sized business, where it might be possible for you to create the messaging system completely by yourself, you will most likely be in charge of a project team. Creating this project team is simple in concept and difficult in execution. All you have to do is create a detailed job description of each project role and appoint a human resource to each role based on relevant skills and experience. Of course, it's never that easy.

In the case of ad hoc and temporary teams, such as the one you're gathering, it's easy to be seduced by the idea that you have done what is needed by simply organizing the team. If you don't give much thought to the process until a problem arises, then it's too late.

Preventing a problem at the beginning of the project requires little effort and is much preferable to solving it in the middle of the project when it will demand a higher cost in time and energy. Because your project team is likely to be together anywhere from 6 to 12 months, getting it set up correctly at the beginning will pay enormous dividends throughout the project.

These are the four essential elements of all successful teams:

- Choosing the right people
- Providing excellent project management
- Having clear goals
- You

Let's examine these simply stated, but complex to execute elements and see how you can use them to assemble the best project team.

Choosing the Right People

These are the five factors of effective team members:

- Expertise
- Respect
- Problem-solving skills
- Openness
- Ability to support the group

Team members will usually be selected from throughout the organization, or brought in as contractors, because of their knowledge of the technology. If the project team includes non-IT people, such as representatives of finance, the users, or marketing, they must reflect the expertise of the groups they represent. They must be well respected throughout the organization. If the person is isolated, he or she is not going to be a good conduit to pass information in either direction, or ideas the individual brings back form the project team will not be listened to, and even less accepted. At the same time, information about critical business needs will not be heard by the team.

It is also essential that you guard against ''dumping.'' It is often tempting for another manager to view a new project team as a way to solve performance or personnel problem by assigning that person to your team. Only rarely will this tactic work to your advantage. Typically, it has the effect of negating the credibility of the project by undermining the five factors above. For a successful project, insist upon the best people. There is no way around it.

Team members must be good problem solvers as well. The ability to analyze and troubleshoot issues in a systematic, logical manner is a key factor in the team's success. Chapter 11 contains a section on troubleshooting methodology that you may want to adapt for use by your team members.

Every team member has to be able to listen to the others and understand their point of view. Because your project team will be composed of members from different departments and disciplines, each may speak a different business language. Each will also have differing perspectives and approaches that must be respected. The best team members are those that are open to viewpoints other than their own. ''I never looked at it that way before,'' is a good indicator that the team member is open to new ideas and respectful of other opinions. That doesn't necessarily mean that he or she agrees. In fact, they may disagree completely. But they are persuasive and nondefensive in stating their viewpoint. They can explain and illustrate their own

view and question assumptions (including their own). They have the ability to walk in other member's shoes and thus are able to help the team reach consensus while avoiding the phenomena of group think.

Real World Scenario

Group Think

Group think, first described by psychologist Irving L. Janis, is the process by which groups of intelligent people make terrible decisions. Group members try to minimize conflict and reach consensus by not critically testing, analyzing, and evaluating ideas. When group think happens, members of the group avoid promoting viewpoints outside the comfort zone of consensus thinking. A variety of motives for this may exist such as a desire to avoid being seen as foolish, or a desire to avoid embarrassing or angering other members of the group. Group think may cause groups to make hasty, irrational decisions, whereby individual doubts are set aside, for fear of upsetting the group's balance.

Eight Main Symptoms of Group Think

These are the eight main symptoms of group think:

Illusion of invulnerability Members ignore obvious danger, take extreme risk, and are overly optimistic.

Collective rationalization Members discredit and explain away warnings contrary to group thinking.

Illusion of morality Members believe their decisions are morally correct, ignoring the ethical consequences of their decisions.

Excessive stereotyping The group constructs negative stereotypes of rivals outside the group.

Pressure for conformity Members pressure any in the group who express arguments against the group's stereotypes, illusions, or commitments, viewing such opposition as disloyalty.

Self-censorship Members withhold their dissenting views and counterarguments.

Illusion of unanimity Members perceive falsely that everyone agrees with the group's decision; silence is seen as consent.

Mindguards Some members appoint themselves to the role of protecting the group from adverse information that might threaten group complacency.

The Bay of Pigs

One of the best-known examples of group think was the decision-making process that led up to the 1961 Bay of Pigs invasion. The main idea of the Bay of Pigs invasion was to train a group of Cuban exiles to invade Cuba and spark a revolution against Fidel Castro's communist regime.

The plan was fatally flawed from the beginning, but none of President John F. Kennedy's top advisers spoke out against the plan. Kennedy's advisers also exhibited the classic characteristics of group think; they had all been educated in the country's top universities, causing them to become a very cohesive

group. They were also all afraid of speaking out against the plan, because they did not want to upset the president. Janis felt that Kennedy's top advisors were also unwilling to challenge bad ideas because it might disturb perceived or desired group concurrence. The president's brother, Attorney General Robert Kennedy, took on the role of a ''mindguard,'' telling dissenters that opposition and counterargument were a waste of their time, because the president had already made up his mind. At one crucial meeting, the president called on each member of his National Security Council for his vote for or against the invasion. Each member, that is, except presidential adviser Arthur Schlesinger whom he knew was opposed. Many members assumed that other members agreed with the invasion plan and went along rather than appear obstructionist.

Of the 1,400 invaders, 1,200 were captured with remainder either escaping or being killed.

The Missile Crisis

Interestingly, it was Kennedy's recognition of the failures of the process that led to a completely different approach to the following year's Cuban Missile Crisis. Kennedy revised his group decision-making process to encourage dissent and debate. He challenged military leaders who pressured him to bomb and invade. He heard the CIA's case for air strikes and Stevenson's counsel for negotiation. Advocates for different views developed their arguments in committees, then met back together. Robert Kennedy later wrote, in *Thirteen Days: A Memoir of the Cuban Missile Crisis*, ''The fact that we were able to talk, debate, argue, disagree, and then debate some more was essential in choosing our ultimate course.''

As a result, the world wasn't destroyed in a nuclear war.

The final characteristic that makes an effective team member is the ability to support the group or project leader's decision fully. The person can put aside any personal reservations or feeling once the decision is made. This does not mean that they should not continue to work to bring to attention decisions they believe are unwise. However, having had their say and heard the opposing viewpoints, they must set aside their own desires for the good of the whole. They also need to be able to communicate the project decisions back to their organization clearly and convincingly.

Providing Excellent Project Management

As project leader, you will bear the responsibility for the success of the project and the demands placed on it. These are the keys to effective project management:

- Discipline
- Structure
- Diplomacy
- Performance management

Team members are also responsible for ensuring that these elements are effectively applied. If each member reminds the others of these four elements, the resulting ''shared leadership'' helps the group stay on track.

Discipline

Discipline is the ability to direct the project team, provide support to the team, and manage differences within the team.

Directing involves such basic task-oriented activities as these:

- Clearly communicating the desired outcomes
- Setting and enforcing deadlines
- Keeping the team on track
- Encouraging participation from all members and avoiding dead wood

While directing is task oriented, supporting is more about doing things that build and maintain relationships. As project leader, you must listen to all team members to understand their differing opinions and viewpoints. You may have to help them clarify and refine their thoughts. You will need to provide equal time for minority and dissenting opinions. Good support also requires confronting a team member's approaches or attitudes when they are not helpful to others or create distractions that move the team off its focus.

Managing differences doesn't mean imposing your will. It means encouraging and allowing productive conflict that exposes all viewpoints so that an informed decision can be made. It means treating all input as valuable. One person, for example may argue for an approach that rapidly cuts costs. Another may argue that change needs to be in a phased rather than rapid manner. As project manager one of your key jobs will be to help team members in developing their positions and opinions for presentation to the group.

The Greek philosopher Socrates said that to ''know yourself'' was the most important thing a person could do. You will do a better job at managing differences if you are aware of your personal biases. You should also help others become aware of theirs. One team member, for example, may have a bias toward the simplest approach to a problem, and another may prefer to provide as many choices as possible. If individuals realize these differences are not essential to success, but are merely preferences, conflict can be minimized.

STRUCTURE

You are also responsible for providing structure for the team members. You can create structure through these activities:

- Project methodology tools
- Team meetings
- Communications outside of the team

There are a number of effective project management tools available, including Microsoft Project. Whichever tool you opt to use it should include time lines, task breakdowns with team member assignments, task interdependencies, and an indication of the critical path.

It takes discipline to use a project management tool well. Updates must be entered in a timely fashion and changes made when they occur. There is no benefit to going off on a sidetrack to gather enough information to make a proper decision without adding the task to the chart. That way, you will see the changes in the timeline, and you do want to see them, even if the news is not good.

Meetings must be organized events. Each one should be scheduled, with an agenda and expected outcomes. A useful, though underused, approach is to set an agenda with time frames for each segment. For example, an announcement could take 5 minutes, questions to clarify it could take 10 minutes, and the discussion could be set for 30 minutes. When the discussion reaches the 30 minute mark with no signs of any conclusion, the meeting should pause. The attendees should then decide how much more time should be allotted to finish the discussion and what to do about

the remaining items. Do not decide that five minutes more will complete the subject, because it is usually not adequate.

Meeting minutes should be taken and shared with all attendees, as well as other team members who may not have been present. They should be filed as part of the documentation of the project.

Communications to others outside of the project team should also be structured in order to ensure that the focus continues to stay on the overall goals. Another purpose is to keep management, users, and customers aware of the impending changes. Assess each potential communication method (for example, correspondence, meetings, briefings, websites, and newsletters) for its ability to deliver the correct message to the correct audience. You should maintain records of when each was used and by whom. Reviewing the records allows you to see where gaps in your coverage are. Overlaps shouldn't be a concern, but you don't want to overburden people in the company or they will simply tune out once they reach a saturation point.

One advantage of these techniques is that you will create a sense that the complex and difficult project process is under control and being managed well. You may not always feel that way and your team may occasionally have its doubts, but having a structure will help get you and your team through those moments of self doubt and worry.

DIPLOMACY

My mother was fond of reminding me that you can catch more flies with honey than you can with vinegar. I took the lesson to heart though I have yet to understand why I was supposed to want to attract flies.

Diplomacy is one of the key skills that you will need to manage your team and, of course, your relationships with the rest of the company.

The most difficult aspect of any project, especially one that involves fundamental changes such as an Exchange Server 2007–based messaging system, is that it inevitably creates political issues that have to be dealt with. What that means is conflicts and opposing points of view need to be identified and resolved when they occur, all while avoiding doing anything that can cause unwanted changes to schedule, budget, or scope of the project. To do that, you will have to deal effectively with intra-team conflicts, cross-functional issues, and managing senior management.

The art of diplomacy turns on the ability to manage conflicts early and rapidly. If left to fester, they will become more intractable and far more difficult to resolve.

Success means that you will have to resolve these conflicts in a way that is perceived as fair and firm. The sales senior vice president who will lose her battle for PDAs and Outlook Anywhere in Chapter 9 will, if you do your job properly, realize the greater good for the company by the decision and feel that you listened to her concerns seriously even though the decision was not what she preferred.

You also need to guard against one of the sources of real difficulty, conflicts you are unaware of. Think of the difficulties in your own life when a spouse or partner is upset with you and you don't know it. The resulting explosion is extremely unpleasant.

It is also much easier to address and manage overt resistance or problems far easier than covert resistance and unknown difficulties. For this reason, you and your team members should spend time with the various user managers explaining the system and gaining their confidence. These managers will be more likely to raise concerns before they become life and death issues.

Dealing with senior management is usually more an exercise in influence and suggestion, rather than direction. Senior managers are not likely to be personally involved in every twist and turn of the project. But don't think that means you can simply disappear into the bowels of the project office and expect things to run smoothly with them.

First, if you're out of sight, you're likely to be out of mind — and that is very, very dangerous for the health and success of the project. Senior managers may have every good wish for the

success of the project, and the active championship by the designated executive sponsor will be important, but by not communicating with them directly, you risk your project being considered irrelevant. This doesn't mean that you have to constantly be in their offices, but it does mean that you need to be proactive in communicating with them.

You should make a point to frequently meet or otherwise communicate with senior management to discuss the status of the project and report significant successes or potential problems. A senior manager will usually have to be coached as to what to say in a public forum about the project, and perhaps even handed a script or brief outline (never more than one page) about the essential facts of the project. The executive sponsor and other members of management friendly to the project are your best potential allies. Cultivate them.

Real World Scenario

Failed Diplomacy and Successful Intervention

In one implementation project I worked on, the project manager had grown increasingly frustrated with what he perceived as the lackadaisical attitude of the user managers. Virtually none attended the project review meetings; few had taken any of the online training and he was frustrated to the point that they did not fully understand the implications of the changes he was asked to complete.

As a result, he sent out an email stating that in order to meet project goals the user managers and their key personnel had to attend a series of "mandatory training sessions."

The project manager, who was new to the company, did not realize that in that particular corporate culture "mandatory" was a word with a coercive and negative connotation. His email and training sessions were seen as high-handed and out of line and earned much resentment.

Within 30 minutes of the project manager's email establishing the dates of the sessions, the executive sponsor for the project sent out his own email supporting the need for everyone to gain a better understanding of the system and *requesting* that everyone sign up to attend the informational meetings.

The email reinforced the project manager's required training, emphasized management's perception of the project as important, and at the same time defused any resentment by restating the requirement as a request.

The morals to the story are that you need to understand the corporate culture, you must exercise diplomacy, and rapid support from the executive sponsor is a valuable ally.

Performance Management

One of your most important duties as project manager is to ensure that clear, obtainable objectives are set for each team member. Regular status checks with the team members, individually or collectively, will help you discover any missed deadlines. When the problem is a lack of training, that need must be met immediately. More likely, the cause is an overload of work that causes the team member to be unable to complete a task on time. When this is the case, the schedule must be assessed to see if tasks have too many subtasks or were not evaluated correctly in the first place.

You must stay on top of such problems and troubleshoot them immediately. Don't try to hide or laugh off missed deadlines. If you determine that the cause isn't lack of training or an excessive workload, then you need to take other steps. No matter how nice you want to be, any inability to perform must be assessed and dealt with decisively so that the overall project schedule is not negatively impacted. This requires a combination of empathy and strictness.

The key to managing team performance is creating a balance between team and individual responsibilities. For instance, the team may have to come to consensus on a particularly difficult decision that requires full participation from all. Certain team members may need to complete tasks or conduct research to make the decision. It is the team's responsibility to ensure that the decision-making process is conducted with integrity. It is the individual's responsibility to deliver his or her assignments on time.

The more you can convince team members to manage their collective performance, the easier your job becomes relative to managing individual performance. This balance is accomplished by setting clear goals and expectations, and establishing consistent feedback mechanisms.

Establishing Clear Goals

Finally, the project goals themselves must be very clear to everyone involved. Organizations often find themselves in difficulty over this admonition and cannot understand why. The cause may be the difference between the level of understanding in the executive's mind and in the project team members' minds. For example, the sponsor of the project may have charged the team to improve the way that the materials management process at one end of the manufacturing process interacts with the daily inventory status at the other end, so as to result in more accurate quotes to the customer. At the initial meetings and in the resulting project definition documents, sponsors and project team members may have believed they had a clear picture of the project's goals.

Difficulties arise when the project team explores the details of what it will take to improve these processes, because the goals may change. The team may find out that to change materials management and inventory, it will have to change the manufacturing system. Since that was defined as outside of the scope of the project, the team members are left with a conflict. They will not be able to make as much improvement as was originally expected because they are constrained by the exclusion of manufacturing.

You: What Can *You* Do?

Even though it's listed as the last item, you are the most critical aspect in the success and failure of your project team. Working with and influencing your team is a significant part of the job, even if it's the one you like least. One of your key jobs is to keep the team's morale high and keep them happy working for you. You also need to encourage them to perform will in the jobs and make sure that they know what's expected of them. How do you do this?

Be a Good Role Model

As project leader, you will influence the behavior of the group by the way you act. If you show up late for work, your team will show up late for work. If you seem to project a lackadaisical and lovely attitude the team will, too. If you are short-tempered and irritable, team members will behave in a similar fashion. On the other hand, if you treat your staff well, they will be attentive to user and customer needs. If you go out of your way to help others or explain things, the team will do the same.

What this means is that you should take care to exhibit the behavior you want your group to emulate. Lead by example.

Treat the Team with Respect

Aretha Franklin had it right; it always boils down R-E-S-P-E-C-T. Thankfully, treating others with respect is simple; treat them as if they are individuals that have worth, and treat them the way you want to be treated.

There are a lot of ways of looking at respect and confidence in another person, but I prefer the simple approach. You give other people respect automatically and without question. You believe in their ability to do whatever tasks and jobs you give them. You should never make or think they have to prove themselves worthy of your trust and respect. A team member should automatically have both until he or she consistently proves unworthy of it.

One way you can show respect is by how you address problems or correct mistakes. If the mistake isn't serious pull the team member aside — *never* in public — and tell then not to worry about it, that everyone makes mistakes. Permit the team member to consider their error in peace and what they could have done differently. If it was a serious error, reprimand him or her. Then, take the heat for the mistake; he or she is, after all, your team member. The team member will know what you are doing and you will usually find that in most cases the team member will be determined not to put you in that position again.

Reprimands should be done face to face and be timely, specific, and about a behavior that needs to be changed. Reprimands should never given in public, unless your intention is to show your lack of respect for the employee and by extension everyone else on the team. Not only will it demotivate the team, but the lack of respect will be mirrored back at you.

Another way to show respect is by keeping team members informed about important events that are happening in the project and in the organization in general.

Listening is another way of showing respect. Team members need to be able to discuss what is on their minds. They should feel that they can come to you with their problems. Hence, you need to make yourself available to your team. Doing so reinforces that you think their needs are important to you.

My mother was also fond of telling me ''Mind your manners.'' As a project leader this includes, but goes beyond, the simple please and thank you that is required in social intercourse. You need to be polite in other ways. For example, don't try to force your political or religious beliefs on your coworkers or team members. Another common impolite behavior is to stop talking to someone to answer the phone without asking permission. There is nothing like making the person feel unimportant to show disrespect and project contempt.

Finally, avoid micromanagement. It sends the message that you have a lack of confidence in team members' ability to do their jobs and solve their problems.

Show Appreciation

Everyone likes to know that they're doing a good job. Showing appreciation, even in little ways, helps maintain morale and loyalty. In fact studies have shown that recognition and being made to feel important are bigger motivators than money.

An easy way to show appreciation is to keep track of each member's hire date and do something on their anniversaries. Celebrating birthdays and personal events may be good ideas as well if you have that sort of relationship with your team and your company allows it.

Another way is to publicly acknowledge then when they do good work. Your compliments should be specific, sincere, and timely. Vague, late, or insincere, sarcastically delivered compliments are not only insulting, but they can also be demotivators.

Be Positive

A good way to create and maintain high morale on a project team is to be positive about the team's abilities and direction. Let your team know that you believe in them. Let them know that you will do what needs to be done to get them what they need to be successful.

Give Clear Direction

Every incompetent project manager I have ever known, worked for, or hired has had one thing in common. They didn't have a clue what they wanted.

- No one on the team understood the division of responsibilities within the project.
- No one on the team knew what was expected of them.
- Team members were given inconsistent and contradictory instructions
- Mind reading was an expected job qualification

Why? Primarily because the project manager lacked the ability to communicate well and was incapable of recognizing it.

Never assume that you are communicating well because you know exactly what you want. It is not always obvious to others.

If you think that you are giving clear direction about what you want but aren't getting it from the team, it's almost certainly not their fault. You are probably not explaining yourself clearly. If you believe that you are explaining yourself but still aren't getting the results you want, ask the team member to explain back, in detail, what it is the team member thinks you want. This can lead to a useful dialogue if there is a misunderstanding. If there isn't a misunderstanding, then at least you know there is problem and can deal with directly. It's a lot easier and more efficient than repeating yourself over and over again.

Note

If you want to get a sense of what you're doing right and where you might be going wrong, Appendix A contains a series of four questionnaires for assessing team behavior. These can help you gauge whether your team is operating at optimal effectiveness and provide you with important clues on how to correct the errors.

Bring Me a Rock

The lack of clear direction is best explained by illustration. In the ''bring me a rock'' school of leadership and project management, conversations usually go something like this:

A team leader says to a team member ''Bring me a rock.''

The team member dutifully brings a ''rock.''

''No, no! Not that rock! I wanted a *rock!*'' says the project manger in an exasperated tone.

The team member dutifully brings another ''rock.''

The project leader looks at it and says, in a slightly shriller tone, ''No, no! Not that! I wanted a *rock*!'' and mutters to herself but loud enough to be heard, ''Doesn't anyone around here know what a rock is?''

Once again the team member goes off and this time comes back with three rocks, thinking one of them might be the right answer. And again the same result.

Over time team members, if they are lucky, usually figure out what the project manager is looking for when they ask for a rock. That is, of course, if the project manager is consistent about the types of rock she likes.

The rock could be a style of writing, a way of laying out project proposals, a budget request, and so on. The result of course is that nothing gets done except the hunt for just the right rock. In some cases, this is because the manger has a perverse and twisted sense of self-importance; in others, it's because of an inability to give clear directions. In all cases it is destructive to an organization's ability to accomplish its goals.

Summary

As you've discovered in this chapter, a business-oriented approach to creating the infrastructure for an Exchange Server 2007–based messaging system involves considerably more than simply purchasing a few installation DVDs and the proper hardware. It is going to call on a number of ''soft skills.''

The reason for this is obvious. The role of technology, especially IT technology, is to support the business. The reason that you are going to do the things that you are doing is to help your organization reach its goals. At the end of the day if the organization's decision makers aren't convinced that this is the correct solution and that they can accomplish their corporate goals with tin cans and string, they will cancel your project and invest in the latter.

As a project manger, you are going to have to master the art of aligning your project with the company's business and showing how your solution will provide value. You are going to have to earn how to negotiate, demonstrate, be diplomatic, and think like a user, financier, and manager. You will need to understand the business environment that you are working in as well as you understand the technical aspects of Exchange Server 2007. You will need to enhance your people skills. If you are heading up a project team, you'll need to understand how to get the best from others.

The first place to start on this complex, but ultimately rewarding, journey is determining exactly what it is your business needs and wants in its Exchange Server 2007–based messaging system; that's what the next chapter is about.