



## **Accelerating Your Project Using Facilitated Work Sessions**

**Jan Means, Resource Advantage, Inc.**

**Tammy Adams, Chaosity LLC**

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### **Abstract**

When faced with the need for change, businesses struggle with issues such as project speed, complexity, deliverable quality, and ownership of results within the organization. Incorporating facilitated work sessions into the project lifecycle to produce specific deliverables accelerates creation of the deliverable, contributes to process and deliverable quality, and ensures early ownership of results.

Facilitation skills are not typically emphasized within the core training of a Project Manager (PM). It is expected that most PMs have the ability to facilitate project team meetings. But it takes a higher skill level to structure and facilitate a cross-functional 2-or-3-day working session of 12-20 people in order to build a specific project deliverable. And, even if you're a skilled facilitator, you may not know where in the project lifecycle to introduce facilitated work sessions to best influence quality and accelerate the project.

The following paper summarizes points from the authors' book *Facilitating the Project Lifecycle: Skills & Tools to Accelerate Progress for Project Managers, Facilitators, and Six Sigma Project Teams* (Means and Adams, 2005). It describes the context for facilitated working sessions and how they relate to business projects. It lists the benefits of using facilitated work sessions, introduces five common types of facilitated work sessions showing where they are typically applied within a project to affect speed and quality, and provides six keys to accelerating projects using facilitation.

### **Introduction**

The project world, even in the most ideal setting, is complex. Multiple projects are active at any given point in time within an organization and vie for limited resources. Projects can be inter-dependent or multi-phased, adding difficulty to execution. Timelines are critical. Some projects should never have been started at all, while others should have been started much sooner. Some project sponsors are engaged and prepare the path for success, while others detach to the detriment of the project team. Direction can be fuzzy, targets less than well-defined, resources unavailable or inadequate. Getting anything done can be as difficult as changing tires on a moving car.

In a recent book on the subject of productivity, George Eckes comments on a study which finds that "the majority of time project teams fail, the primary root cause is poor team dynamics... A more common stumbling block is how a team conducts its work, and the dynamics of the team. Thus, it is our hope that we can review the keys to improving what, for many, is an elusive target – having groups of individuals work together to achieve what they could not achieve alone." (Eckes, 2003, p2)

### **Facilitation and Projects**

Facilitation is a discipline that enables bringing together people to accomplish a specific outcome in a determined period of time. Facilitation within the project lifecycle is a new application of a proven concept which supports project delivery by providing specialized skills and techniques that focus on people and access their collective knowledge. Facilitation enables us to engage the right people at specific points in the project effort to build the necessary work products. We refer to these point-in-time interventions as "work sessions".

### **What is a Work Session?**

It is a highly organized, structured meeting with people who have a stake in the project with the purpose of “working” – wrestling through issues, making decisions and documenting results – toward the production of a specific work product (see Exhibit 1).



**Exhibit 1 – Facilitated Work Session**

These events usually range between 1 to 3 days in length and are led by a capable facilitator who will guide the work session participants to achieve specific objectives. These work sessions have the following core characteristics:

- *They have a purpose that is aligned to project objectives.* The facilitated work session must have a set of clear objectives that fit within the scope of the project. They are designed to achieve a specific goal or project deliverable.
- *They are systematic.* The work session has a well-defined approach and structure. It’s not just an adhoc meeting of interested parties. Preparation, work session delivery, and follow-up activities are all part of the work session process, with clear roles and responsibilities.
- *They are collaborative.* This is not a visit to a doctor’s office, or a trip to see an attorney. The participants do not show up so that an expert can tell them what to do. The participants *are* the experts, and are led by a *neutral* facilitator who seeks the input and full involvement of all participants to achieve the objectives of the work session.
- *They encourage discovery.* The work session does not introduce “the answer” then drive for acceptance. It is a place for healthy debate and discussion. It is a place of discovery where the ideas and opinions of the participants contribute to exploring and embracing the best outcome for the business situation.
- *They create substantive outputs.* Work sessions result in high quality outputs that are specific to the needs of the project. This is not an encounter group. This is not a discussion group. This is a work group. The agenda activities, group dialogue and interaction are designed to produce the decisions and content required for the project deliverable.
- *They promote accountability.* Decisions within project work sessions are made by consensus. This does not mean unanimity; rather it means that all participants are willing to support the decision 100% within and outside of the work session setting. They are willing to be held responsible for the decisions they make and their resulting impacts to the business.



## Facilitation and Its Benefits

Facilitation is not simply meeting management. Facilitation is not magic and it's not science. It's not presenting information, giving advice, nor teaching. Facilitation, at its best is "the design and management of structures and processes that help a group do its work and minimize the common problems people have working together." (Justice and Jamieson, 1999). Good facilitation requires:

is:

- *Planning*— the ability to think through the desired objectives and create a structured plan to achieve them.
- *Flexibility* – the ability to change direction to meet the groups needs without taking it as a personal affront to your planning
- *Objectivity* – the ability to guide the group toward the objective without bias
- *Good Communication Skills* – the ability to bridge the gap between technical and non-technical information, the ability to manage group dynamics effectively.
- *Patience* – the ability to let the team struggle with issues without stepping in to resolve them. Many times the struggle is just as important as the resulting decision.

Several of our clients found that introducing facilitated work sessions into a project accelerated their end-to-end delivery timeframe in 2 distinct ways. First, it accelerated their building of the project deliverable. Second, it accelerated downstream progress because the deliverable was better understood by the users since they were involved in its creation. Plus, the improved quality of the deliverable eliminated rework in later phases thus accelerating the project further.

Are facilitated work sessions the only way of accelerating projects and introducing quality and ownership? Absolutely not. But does it work? Absolutely. Capers Jones in his 2000 study of "Software Assessments, Benchmarks, and Best Practices" found that facilitated working sessions provided the following project benefits: Tangible benefits included:

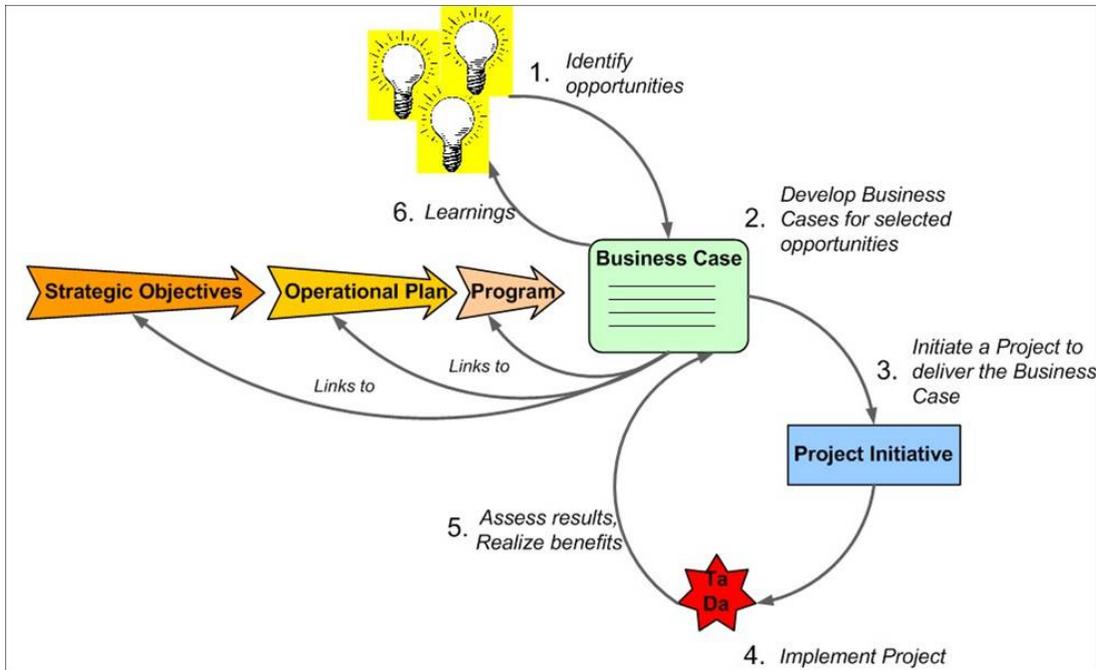
- Reduction of the risk of scope creep from 80% down to 10%
- Acceleration in the early project lifecycle phases (including Scope Initiation, Planning, Definition) by 30 – 40%
- Reduction of the overall project elapsed time and workforce effort by 5 – 15%

Intangible benefits are similarly impressive, and include:

- Ownership of results
- Improved quality
- Improved working relationships
- Shared decisioning yielding informed decisions, and support of these decisions.

## What do We Mean by "Project"?

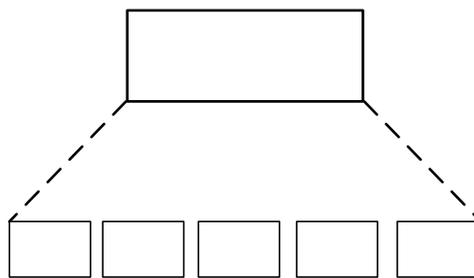
A "project", according to the Project Management Body of Knowledge, is a temporary endeavor undertaken to create a unique product, service or result (PMBOK® Guide, Third Edition, 2004). So let's look at the "ideal" project cycle to see where facilitation would make the most sense. Exhibit 2 depicts an ideal business context for a project.



**Exhibit 2 – The Ideal Project**

In an ideal business world, the project lifecycle starts with an idea, an opportunity for business change, and continues through subsequent phases to validate the opportunity, perform business analysis, define and build the solution. Until, finally, it is implemented, at which point, the project ends. Transition is complete. Ultimately the business owns the solution, and continues to monitor performance, assess learnings, and recognize when the next change is needed

To achieve this, project management methodologies organize project work into distinct phases of activity that accomplish a specific set of outputs. These chunks of activity, typically referred to as Phases (see Exhibit 3), have meaning within the project methodology – accomplishing cohesive sets of work or providing convenient end-points for business approval and funding decisions.



**Exhibit 3 – Sample of Project Lifecycle Phases**

Whether your project lifecycle has *four* phases of work or *nine* phases of work is of less significance than *what you are required to produce* along the way. Phases may be sequential, or at times may be overlapping. There is no single best way to organize your project. Choose an approach that is appropriate to your industry, business culture and project challenge.

## Where do Work Sessions Fit In?

Although facilitated work sessions can be used for many purposes, we will focus on five of the most common work session types we conduct. These work sessions support the building of key deliverables that you would find in any project methodology and progress checkpoints along the way. The five core work session types are:

### 1. Project Charter Work Session

This work session starts you off on the right foot. It develops a shared understanding of the need or problem being addressed by the project effort, and how it's being handled in the current environment. It level-sets the team on the work performed to-date. And it defines the scope of the project, establishes the purpose and objectives, and uncovers impacts and dependencies so that informed decisions can be made about potential benefits, costs, and resourcing.

### 2. Process Analysis and Design Work Session

Business processes depict how work gets done. Once scope has been established, the Process Analysis and Design work session enables an understanding of how work is currently accomplished, compares this to customer expectations and business targets, explores points of break-down, identifies opportunities for change, and re-defines how work should be accomplished in the future. The roles and responsibilities involved in the process are defined, and initial expectations regarding supporting technology are captured. Process design also ensures that critical measurement points are factored in so that performance can be monitored and maintained.

### 3. Business Requirements Work Session

This work session gives substance to the solution. Thus far in the project we have a clearly defined scope and re-designed work processes – the basic skeleton of the solution. The Business Requirements work session puts meat on the bones by defining *what* the business needs, not yet *how* the solution will be accomplished. The result is a clear, unambiguous definition of requirements for the project scope. All types of requirements needed to support the business solution are defined here. This includes requirements for supporting technology, as well as requirements pertaining to security needs, performance, people (e.g., training), and process (e.g., policy decisions).

### 4. Risk Assessment Work Session

The Risk Assessment work session promotes the careful analysis of project, business, process, and customer risks. Potential risks are rated with respect to severity, probability of occurrence, and ability to detect the effects of the risk. Causes are explored, and mitigating actions are identified. For the highest risks, contingency plans may also be created.

### 5. Work-in-Progress Review Session

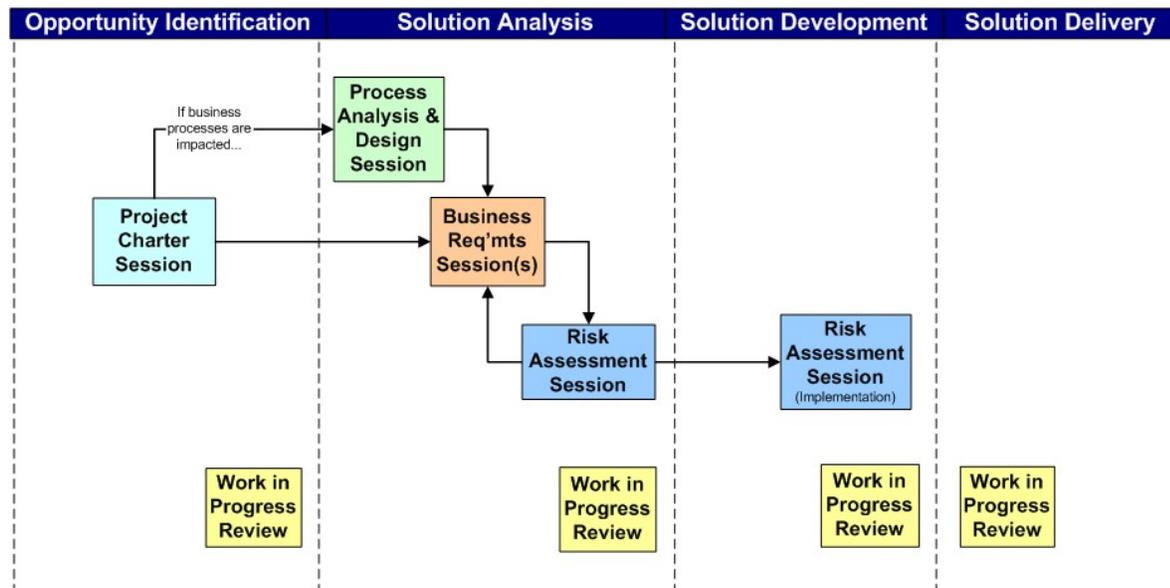
Work-in-Progress Reviews provide key checkpoints on project progress. They can be inserted into the project prior to specific project milestones or phase completion to ensure that the project is on track, that deliverables are synchronized, that project dependencies and risks are being monitored, and that all team members and pertinent stakeholders understand what is being delivered.

The key in recognizing *where* to apply these work sessions is to recognize *what* needs to be delivered. Let's look at where these five work session types typically fit into the project. We will use a generic project lifecycle that consists of four phases which will take the project from inception through implementation: Opportunity Identification, Solution Analysis, Solution Development and Solution Delivery.

Project Phase (Generic)	Purpose of Phase
<i>Opportunity Identification</i>	Define the opportunity, objectives and targets, explore feasibility, establish the initial business case, set the scope of the project effort, and establish the project team and stakeholders.
<i>Solution Analysis</i>	Define the change. Design business processes and supporting roles. Establish requirements for people, process and technology. Determine what will be measured.
<i>Solution Development</i>	Finalize solution design, prototype if appropriate, build out the solution, test,

Project Phase (Generic)	Purpose of Phase
	validate, and prepare for implementation.
<i>Solution Delivery</i>	Ready the organization, and rollout the solution, internalize the change and monitor performance.

Exhibit 4 shows where the five work session types introduced above typically fit within a generic project lifecycle.



**Exhibit 4 – Where Work Sessions Fit into the Project Lifecycle**

Facilitated work sessions are inserted into the project phases *at the point where the corresponding deliverable makes sense*.

- The *Project Charter work session* yields a clear definition of project scope and so, should be performed early in the project lifecycle.
- A *Process Analysis and Design work session* is used when business processes will be changing as a result of the project effort. Hold these work sessions first, since they lay the necessary foundation for successful definition of business requirements.
- Conduct a *Business Requirements work session* after the Project Charter has been finalized if no Process Assessment is being performed. Otherwise wait until analysis of the process has been completed.
- Discover risks while analysis is still in progress by convening a *Risk Assessment work session*. As risks are explored, it is quite common to identify risks and corresponding mitigating factors that lead to additional requirements. As you approach implementation, again convene a Risk Assessment work session, to identify new risks which may have emerged that are specifically related to testing and implementation.
- Throughout the project, convene *Work-in-Progress review sessions* prior to phase checkpoints to socialize and validate key deliverables, confirm integration of outputs, communicate resolution of issues, and verify project progress.

## Six Keys to Accelerating Projects Through Facilitation

### 1. Assess the Need

Are we proposing that every project, no matter its complexity or purpose, should utilize facilitated work sessions? No. Then how do you know when a facilitated work session would be beneficial? Consider the situations where collaboration will add the most value.

We've analyzed the projects we have worked on with our clients to determine which ones gained the most value from facilitated work sessions and found some common characteristics. If you can answer yes to any of the following questions, a facilitated work session will be a valuable contributor to the success of your project.

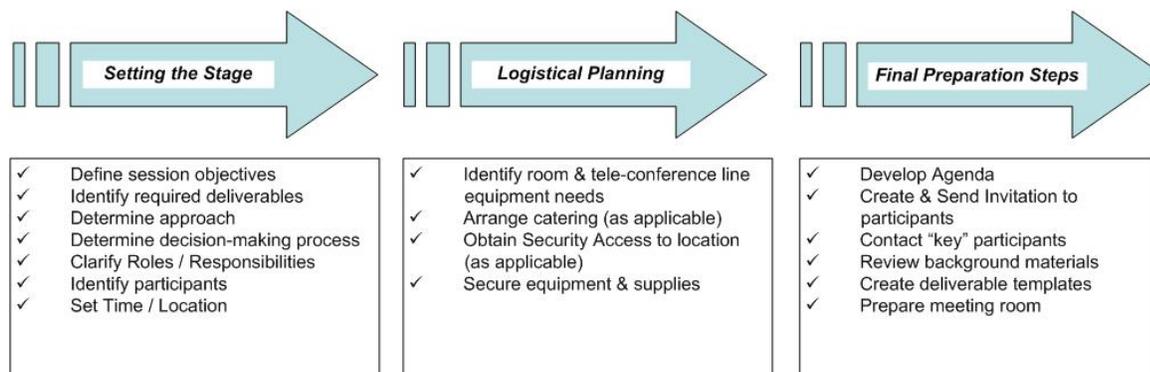
- Your project effort *crosses multiple lines of business*, or multiple departments within the business.
- Your project is tied to a *critical timeline* that allows little or no slippage.
- Your project is one of the top ten *strategic initiatives* of the company or division.
- Your project is attempting to accomplish something that is *new* to your company.
- Your project is resurrecting something that was *tried before and was unsuccessful*.
- Your project requires *input of experts* who are unavailable to participate full-time (or on a regular basis) with your project team.
- Your project will result in changes that require broad *socialization* or *group consensus*.
- You're experiencing *scope creep* or having difficulty getting a *clear definition of requirements* from the team.
- You're operating in a *geographically-dispersed project environment*.

Conversely, if your project scope is small and requirements are relatively uncomplicated in nature, or the project is not following a critical timeline, is less visible from a strategic viewpoint, or is something you've done over and over again, and you have a relatively small team who are co-located, then facilitated work sessions may not be of great benefit to your project. But even for these types of projects, we encourage you to find a way to incorporate expert knowledge into your project and to communicate information and decisions throughout the project team.

### 2. Plan Effectively

The Merriam-Webster Dictionary defines "preparation" as the state of having been made ready beforehand; readiness. A successful work session is all about planning. You don't just show up assuming that you and the team will be able to figure it out. You need to prepare. As a facilitator, you'll need to prepare the sponsor, the project manager, the participants, the materials and yourself. You'll need to help the team assess what needs to be done to prepare for a work session, what can reasonably be accomplished in the work session timeframe, and who needs to participate. All of this takes planning.

Exhibit 5 outlines a roadmap for successful work session planning.



**Exhibit 5 – Roadmap for Successful Planning**

### 3. Engage a Capable Facilitator

Matching an appropriate facilitator to the needs of the work session is critical to success. Consider the objectives of the work session, the business challenge, the participants, the anticipated group dynamics, the logistics, and the required outputs. Then look at the experience and skills of your facilitator candidates. How well do they match the needs of the work session? This is not a decision to be made lightly. Many work sessions are derailed by not carefully matching the skills and style of the facilitator to the needs of the work session and the dynamics of the participants.

In addition to level of experience, business knowledge, and personal style, consider the following when choosing a facilitator for your work session. The facilitator must be able to:

- Manage group dynamics
- Structure group activities to meet required timeframes
- Allow the team to discuss, discover and decide without deciding for them
- Let the outcomes be owned by the team rather than themselves
- Set aside their other “hats” and serve as a neutral process guide
- Facilitate the building of the required deliverables.

We’re often asked if a Project Manager can facilitate work sessions. The answer is maybe. It takes a special skill to be able to disengage from your stake in the project and be a non-biased guide. If you find yourself in this situation, we’d suggest you use your knowledge to actively question and challenge the group’s thinking. Perhaps citing examples as ways to promote creative exploration of new ideas, rather than stepping in to voice your opinion.

### 4. Engage the Right Participants

Along with choosing a capable facilitator, the most important ingredient to work session success is engaging the right participants. Consider who will add value to meeting the objectives and producing the required outputs of the work session. You will need to engage:

- *Subject Matter Experts* who understand how the business really works
- *Support Partners* (such as finance, technology, legal, audit representatives) who can identify the impacts of the proposed change
- *Project and Process Owners* who’ll ensure the improvements get implemented and measured
- *External Customers* who can confirm that the results meet their requirements
- *External Suppliers* who may be critical to the implementation of the product or service

Not all of these types of participants may be needed, but it is recommended that you consider these various roles and the value they can contribute within the work session. Ask yourself, “Does this person add value to the work session? Is this person necessary to accomplish the work session objectives?”

We recommend that you limit the number of participants to 12 – 15 if at all possible. Larger groups can often slow the overall progress of the work session, thus not allowing for completion of all the session objectives. So limit the group to participants that not only represent their areas well, but can also serve as decision makers. Remember that you must have the *right* participants to have a successful work session.

### 5. Use the Right Work Session Approach & Techniques

As shown in Exhibit 6, there is a structure to the work session process—opening activities, deliverable-building activities, and closing activities supported throughout by process management activities. However, details within this structure are customized for the specific work session objective you’re attempting to achieve. Even the best Agenda will require alterations to meet the specific needs of the project. Understanding what you need to focus on in each of these segments will help you be a more effective facilitator.

### Exhibit 6 – Standard Work Session Approach



Here are a few recommendations regarding the activities within each of these segments:

- *Opening Activities* are the actions that need to occur at the beginning of the work session to form the team and synchronize their knowledge and expectations.
  - Have the sponsor or project manager kick-off the work session by welcoming the team and thanking them for their participation over the next few days. This sets the context for the work to be accomplished. Encourage the team to make necessary decisions and hold the team accountable for results.
  - Facilitate team member introductions.
  - Describe the work session roles. As facilitator your role will be to guide the process. Their role as participants is to provide the knowledge, expertise and content.
  - Confirm the work session objectives. It's important that everyone concurs with what the work session is intended to achieve and that expectations of the resulting deliverable are clear.
  - Review agenda. The agenda is your roadmap to achieving the objectives. Walk through the activities planned during the work session to demonstrate how the objectives will be met and to give the team confidence that their needs will be addressed. Post the Agenda on the wall in clear view of the team and leave it there throughout the work session.
  - Review the ground rules – guidelines for participation in the work session.
  - Discuss logistics. Let folks know where the restrooms, vending machines and smoking areas are. Share any parking, security or other venue-related information that is relevant to their building access or on-going participation.
  - Bring the participants up-to-date on the project status. The sponsor, project manager or designated subject matter experts will need to present appropriate background materials that will bring the team current on the project vision, objectives, progress and decisions. This allows the team to start from a shared understanding of where the project is at this point in time.
- *Deliverable-Building Activities* are those activities that the facilitator leads the team through to create sections of the deliverable. To be successful in facilitating the building of a deliverable, remember to:
  - Explain the activity. Describe what the team will be doing and how it relates to the work session objectives.
  - Elicit and clarify responses. Use questioning, open ended or fill-in-the-blank statements, rephrasing and other forms of facilitated dialogue to gather the information you need to build that section of the deliverable. Overcome the “just because they said it, it must be so” mindset. If something doesn't make sense to you, odds are it doesn't make sense to others in the room. So ask for clarification.
  - Keep the dialogue moving by questioning, actively listening, integrating what you are hearing with what has been previously discussed and decided, feeding-back to the team, and listening again. This cycle continues throughout the work session. A facilitator must *listen to understand*, not listen to take notes.
  - Document the results. Documentable items are statements that the team agrees to - not necessarily items still under discussion.
- *Closing Activities* are the tasks that must be performed at the end of the day or at the end of the work session to wrap up the results and prepare the team for what happens next. Don't make the mistake of thinking these are irrelevant clean-up chores. These tasks are critical to maintaining the momentum of the team.

At end of day:

- Summarize the day's activities. Review where you are in the agenda and highlight the accomplishments and learnings from the day.
- Remind team of any overnight assignments. Determine when the results of those assignments will be presented back to the group.
- Discuss what will happen during the next day's activities. Take a quick walk through the agenda for the next day to remind the team what remains to be accomplished.

At end of work session:

- Summarize the work session accomplishments. Review where you are with respect to the objectives and highlight the team's accomplishments. Identify the learnings gained from the work session.
- Review Issues and Action Items. Review each Action Item or outstanding Issue captured during the meeting to ensure clarity and assign owners and due dates. Discuss the process for getting completed Action Items and Issue resolution to the project manager.
- Discuss the next steps in the project now that the work session is complete. This is where the work session is officially turned back over to the project manager so they can direct the continuing project process.

## 6. Distribute Quality Results

It's been said that the "job isn't over till the paperwork is done", and that's true of facilitated work sessions. Communicating work session results brings closure to the shared decisions of the participants, and prepares the way for effective use of work session outputs in the next steps of the project. The following are characteristics of a quality work session deliverable:

- It is provided in a timely manner to all participants, the project manager and the sponsor
- It accurately reflects the shared decisions and agreements of the team.
- People who weren't at the work session can understand the deliverable – it enhances communication
- The deliverable is consistent with standard deliverable templates and quality standards
- It can be effectively explained and used by the team as they move forward into the next stages of the project
- It can be updated using tools readily available in the organization.

### Summary

Whatever your project process or methodology, strive to incorporate the effective collaboration of knowledge-experts into every project you touch. Recognize that the key element to successful change is people. Look for new ways to involve them creatively in the project process. Involve those who can influence others. Search out opportunities within your project to utilize facilitated work sessions which can tap into the joint knowledge of your resources, and bring this knowledge to bear at specific points throughout the project to accelerate the project timeline and to improve the quality of project deliverables.

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