# Project Management in a Virtual Environment

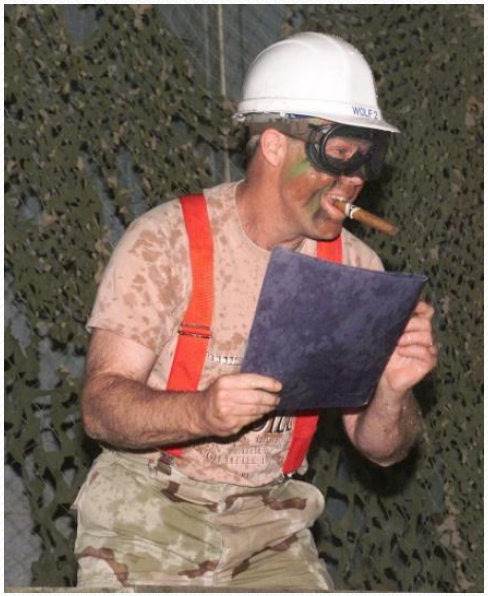
Presented to:

Montgomery, Alabama Chapter, Inc.
May 12, 2011

# Who Am I?

- Raised in Austin, TX
- Christian education
- BA – USAF Academy
- Fighter Pilot – F-4, F-16
- MBA – Golden Gate

- *Fighter personnel staff*
- *Inspector General team*
- *Commander*
  - Germany, Korea, ID, AZ
  - $200M budgets
  - 1800 members
  - 5 different aircraft types



- Diverse experiences
- 17 Moves in 30 Years

# Prior Project Management Experience

- 3400 hours in fighters
- 300 combat – Bosnia, Iraq

- Project management phases at 600 mph

# “Grounded” Projects

3 U.S. military delegations to People’s Republic of China

Southwest U.S. Region Combat Air Patrols

NORAD & FBI Coordination

# Learning Solutions & Human Capital Development

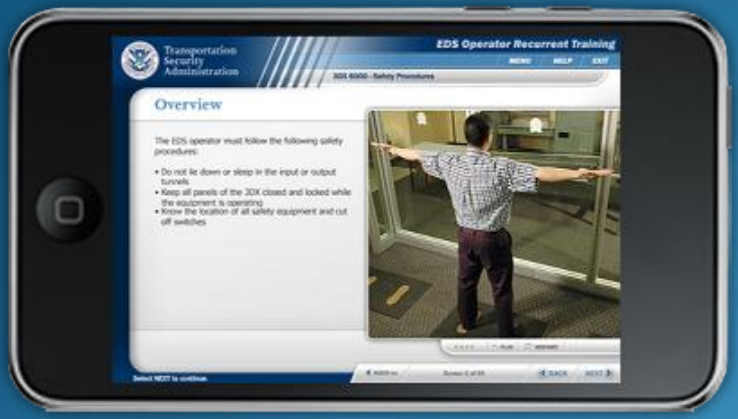
- Headquartered in Falls Church, VA
- Offices in Indianapolis, IN; Champaign, IL; San Antonio; TX; Orlando, FL; and Chicago, IL.
- Learning consulting company that provides analysis, design, development, delivery & evaluation of technology based learning solutions for the Federal government for over 15 yrs
- For example…

# Immersive Learning
# Training in Realistic Performance Environments

- Increases the training experience fidelity by immersing the student in the performance environment and frame-of-mind

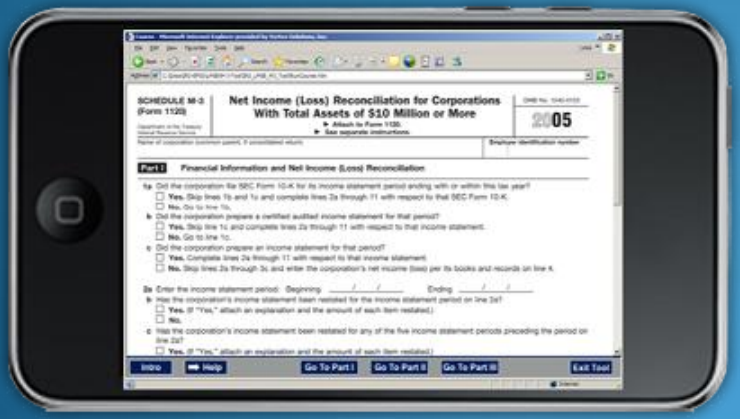
- Elements tied to authentic performance tasks
- Poor decisions produce realistic consequences

# Mobile: Learning Extensions



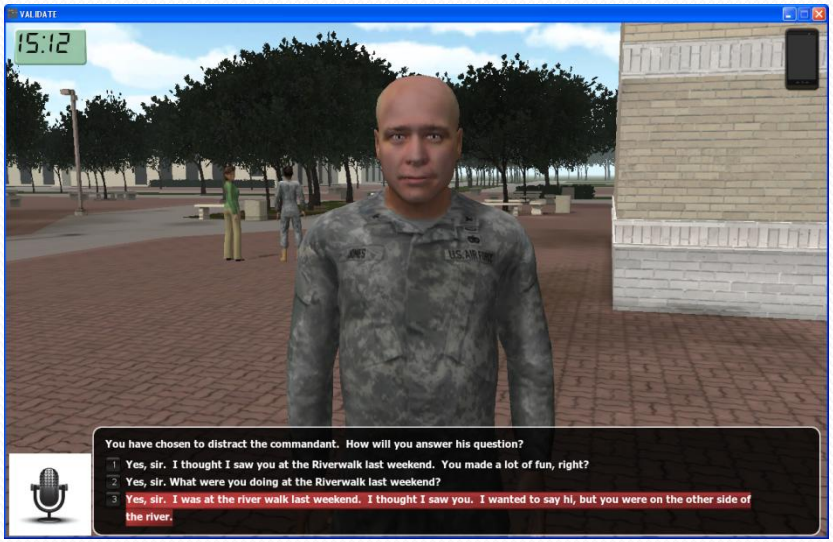

Learning Content

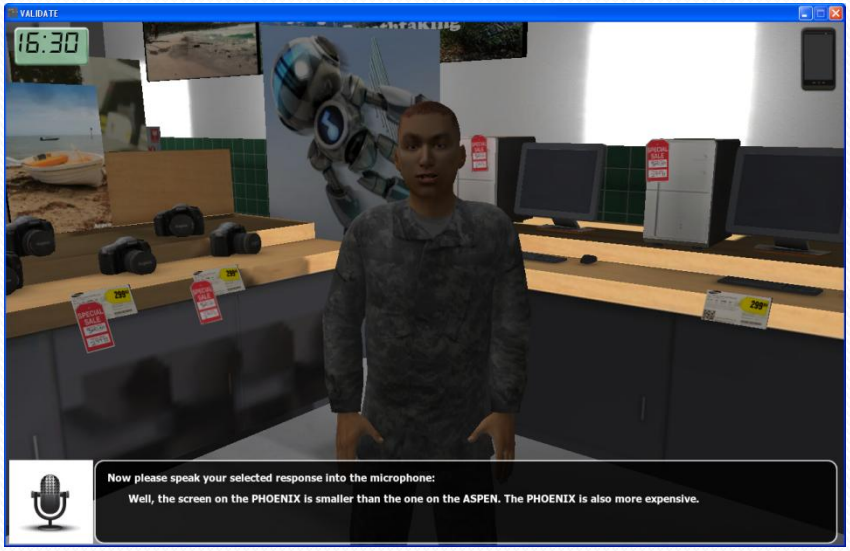
Mobile Applications



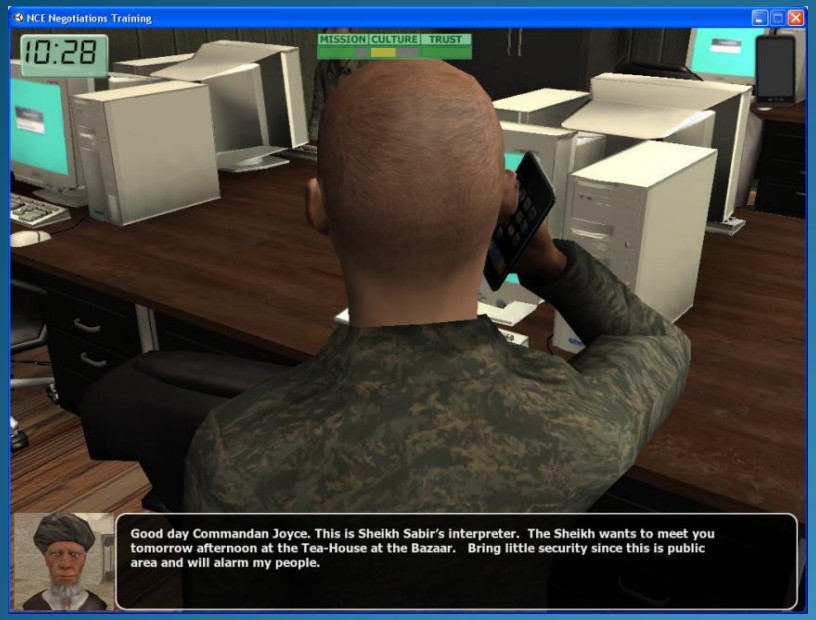

Performance Support

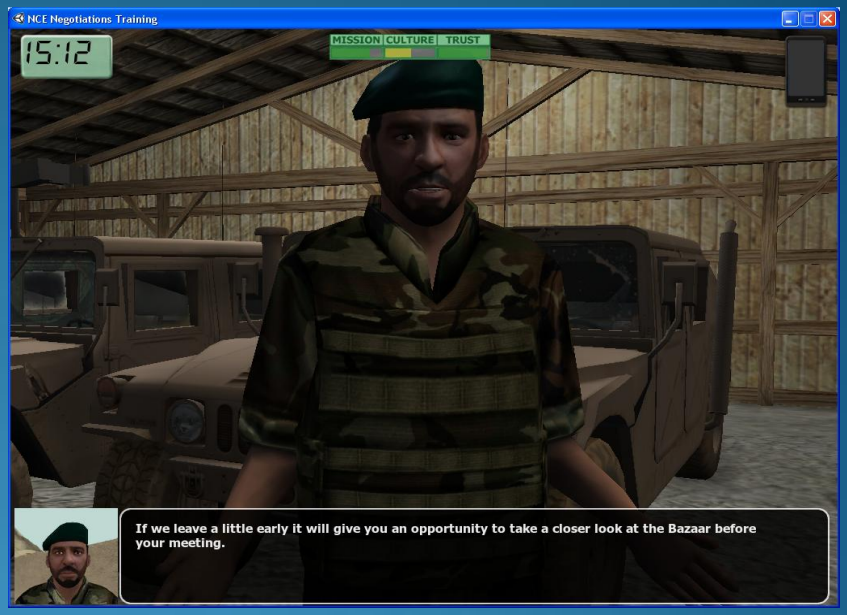
# Voice-Activated Situational Decisions





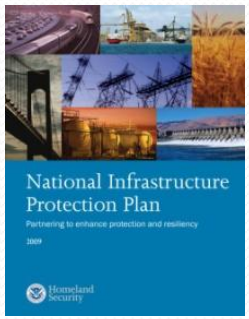
# Culturally Smart Avatars



# Project Management Clients

Bureau of Diplomatic Security
Office of Anti-Terrorism Assistance




U.S. Citizenship & Immigration Services

# Virtual World Properties

- Not bound by traditional properties (time, location, space)
- Synchronous / asynchronous interaction
- Geographic agility for human resources
- Simulated actions and without real consequences
- Speed bumps - technology diversity; firewall inhibitors; “pipes”
- Data – moved often; touched by many; vulnerable
- Relationships and team building more difficult
- Visual communication feedback is rare

# Trends to Virtual Workforce

- e-Learning: (WBT, webinars, online conferences)
- Info Development: (outsourcing via internet)
- Marketing: (e-ads, social networks, choice polls)
- Distributors: (news, applications, games, e-cards)
- Personal Services: (banking, shopping, travel, bills, food)
- Entertainment: (games, movies, TV, personal apps, sports, sex, social networking)
- Research: (collaborative, interactive, push/pull)
- Project Management: (remote, asynchronous, new tools)

So –
what does a PM need to consider in a Virtual Management Environment?

# Initiation Phase

- Who works for who?
  - Virtual lines of responsibility: geography vs. activity
  - Personnel selections: e-resumes, pictures, template, audio
    ("water cooler" questions, communication preferences, virtual experience)
  - The workforce: new demographics … they are "wired" differently
- Prelim scope statement – identify assumptions & constraints
  - Templates for HW & SW sync, communication selections, security
  - Deliver or post highlighted SOW – portal, sharepoint
  - Create distributed documents -- names, time stamps, and due dates
- Milestones & work estimates
  - Competing projects, planned personal events, required training
  - Government contracts mainly FFP – lessons for add factors

**How does a PM compensate for a virtual environment?**

# Planning Phase

- Management Plan development – team involvement
  - Collaborative tool: SharePoint, wiki, portal, Skype groups, FB
  - Assignments: multiple small inputs with deadlines
  - Communication: IT capabilities; sequential/simultaneous; standards
  - Process: formal or not; email mgt; deliverable handoff; approvals
  - Risks ID – version control, comm. gaps, “local” pop-ups, scope creep
- Information Distribution – effective methods?
  - Large files? Collaborative products? Client review?
  - I.E. Dropbox, FTP site, Google docs, Acrobat
- Methods for “rapid” feedback
  - Simultaneous; feedback timeslots; daily queue; wiki page, Cubetree
- Define project measurements – virtual uniqueness?
  - Time; cost, quality: No – Delivery: Maybe

# Execution Phase

- PM Methodology
  - Kickoff meeting: intro slide w/ photos; firewalls; download needs (adobe, etc); client feedback (body language?); recording; backups
  - No travel budget: trade labor hours for a face-to-face trip?
- PMIS
  - Labor specialties vary in comm. preferences (ISDs, graphics, etc)
  - Introduce & demonstrate
  - Set expectations
- Work Performance Info
  - Templates on portal, data verification?
- Consulting
  - Client personality, stakeholder involvement, virtual tool availability?
- Integrated Change Control
  - People delete emails!; spreadsheet for requested acknowledgements?

# Control and Evaluation Phase

- Loss of Tangible Control – who is working when
- Measurement tools – changes in measures devices
- Data – generational learning preferences need to be considered
- Subcontractors – the ‘X’ factor
- The Plan – review often & address issues before problems
- ICC – harder to coordinate and implement

# Closing Phase

- Team members -- scatter fast
- Feedback templates -- control #'s, deadlines, consequences
  - Email (delivery receipt) … 'snail' mail?
- Bonus determination – selection criteria
- Letters of commendation – personal observations?
- Write-ups to HR
- Formatting of multiple deliverables

# Communication

- Faces to names…
  …names to personalities…
  …personalities to messages
- Listening – as the “blind”
  - Active: looking at an avatar vs. in the eye
  - Effective: (non-verbal) “feel” questions vs. body language
  - Para-lingual: (vocal non-verbal) tone, volume, pitch
- Set standards and remain consistent (content & delivery)
  - Formal: policy, legal, contract, deliverables
  - Informal: meetings, drafts, collaboration, reviews, coordination
- Roll calls vs. polling
- Must compensate for the “mobile factor”

# Risks

- People – dynamic manpower pool, behind the scene communication nodes, lack of team identity
- Loss of power – client meetings, deliverables, read-aheads
- Viruses – plug-ins, COT, collaborative actions, personal systems
- Crashes – servers, networks, computers
- Data security – FOUO, data loss/corruption, collaborative backup
- Personnel changes – database/coding specialization, data storage
- Time zones – client meetings, deliverable deadlines, COB
- NOTE: Avatars never look like the real person
- Web Cams – video on/off; mic mute/unmute

# Tips for Success
## "To Do's"

- Recognize: there IS a difference between physical and virtual project management
- Remember: Sound PM principles still apply
- Know: Even more effort required in communications
- Train: to enhance "listening skills"
- Use: the tools you have
- Inquire: about emerging options
- Learn: to use new tool sets (see Betty @ AUM)
- Run: evaluations of your virtual tools (control the technology)
- Change: tools and systems that are not useful
- Inject: "leadership" for motivation & interest

# Tips for Success "To Avoid"

- Jokes on phone conferences
- "Audio only" gives less retainable information (ppt., demo's, charts)
- Don't accept poor equipment (spend a buck)
- Verbal coordination vs. authorization (if it's not in writing, it's not so)
- Sitting in your "virtual" office (must "walk" the virtual" halls)
- Waiting for full draft or report (prototypes are recommended)
- Total reliance on technology for Project Mgt (tools vs. truth)
- That web cam!!!

# Speaking of Tools

- Collaborative systems: Portals, wikis, social networks
- Conferencing systems:
  - Phone – free teleconf.com
  - Audio/text – Skype, Webex, Shoretell
  - Video – Adobe connect, persistent learning environment
  - Second Life – “Islands,” meeting rooms
- Deliverable systems: FedEx/UPS, electronic receipt, secure email
- Microsoft Project: Interconnectivity, programmable
- Cloud computing / PM’ing
- Good technical advisor

# Summary – PM in a Virtual Environment

- Project management core principles still apply
- Changing workforce, clients, partners, mobility
- Team building efforts are as valuable as ever
- Don’t let technology drive your management style
- Some PM processes will need customizing
- Take work to the workers
- Options may now be blended vs. single-point solutions
- Do what works for you and your team

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Skype Home | Profile | Facebook | Give feedback

## Learn how to use Skype

View help videos

## News and alerts

Show top contacts

Update your mood message

### Top contacts

Jack Jarow

Amanda Palla

Terry Williams

Kenny Gilliland

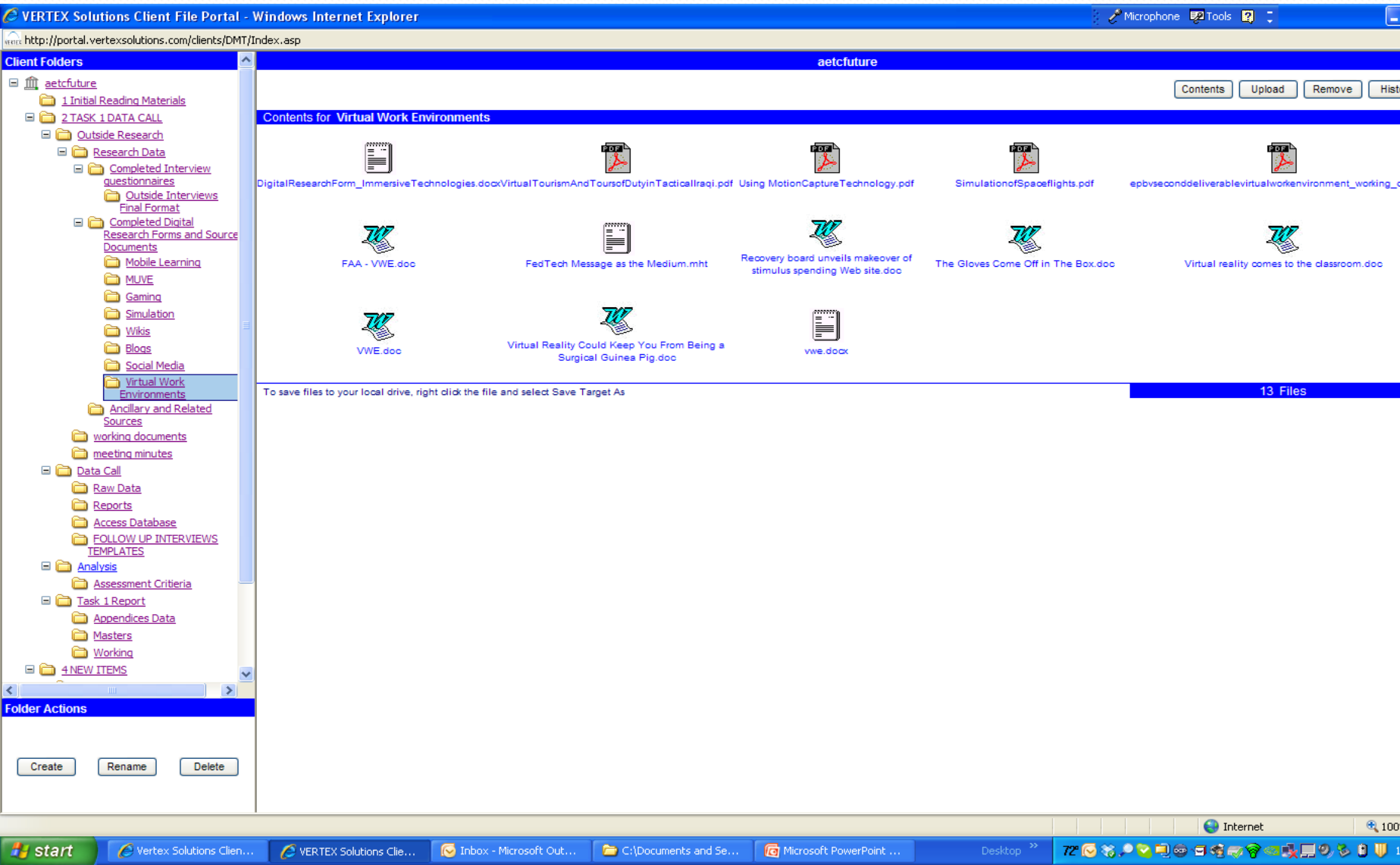
Anthony Abernathy

Mark A. Heimburger

Scott Walker

bubbatdy

Jaime Stone

Jeff Yankey

# Project Team Portal