

Project Management for Team Members¹

Project Team Members and Project Meetings

Marco Sampietro

INTRODUCTION

This is the fifth article of the series: Project Management for Team Members (aka Project Followership). We will deal with the role of project team members in project meetings, with a special focus on the kick-off meeting.

The topic of project meetings is one of the most overlooked in project management literature and discussions. This is strange as meetings are a key ingredient in every project environment. In fact, it is during meetings that much information and many updates are shared, many decisions are taken and many human interactions happen.

There are different types of project meetings, of which we can mention:

- Kick-off meetings
- Project status meetings
- Project review meetings

While the role of team members is quite clear in the last two types of meetings (where mostly fact-based information is provided), the role of project team members in kick-off meetings is almost neglected.

One of the aims of kick-off meetings is to formally notify the stakeholders of the project start-up and at the same time check that everyone has understood their role and relative responsibilities. It is also likely to be one of the few occasions when stakeholders have the opportunity to meet each other, and this is why team members should take full advantage of it to get to know the main stakeholders and their expectations and strategies (global vision, see second article in the series).

Unfortunately, it is not hard to find team members who, not being sufficiently aware, perceive these meetings as an unnecessary element that “steals” time and adds nothing to the management of the project. Their participation is more due to moral obligation, organizational pressure, or even the opportunity to eat some free sandwiches (food is often served during kick-off meetings to increase the

¹ This series of articles on project management for project team members is by Prof. Marco Sampietro, Bocconi University School of Management in Milan, Italy. Prof Sampietro is co-author and/or editor of 10 books on project management and 7 books on IT management, including *Empowering Project Teams: Using Project Followership to Improve Performance*, CRC Press, 2014. See his author profile at the end of this article.

participation rate). Despite the poor quality of many kick-off meetings, they are one of the most used project management tools in organizations with both low and high project management maturity (Besner and Hobbs, 2004).

We believe that team members who have the opportunity of being involved from the outset should play an active part and should recognize kick-off meetings as a unique occasion which, if managed well, can provide the answers to many questions and help to spread the sense of belonging and involvement.

KICK-OFF MEETING AND THE ROLE OF PROJECT TEAM MEMBERS

Support in preparing for kick-off

In general, preparing the kick-off meeting is the project manager's responsibility. In any case, team members can make valid contributions so that the preparatory activities can pave the way for a successful meeting. Contributions can be in the form of:

- the collection and distribution of the necessary documentation. In fact, sometimes team members have documents (and knowledge) that project managers do not have.
- help in defining the list of people who should be invited to the meeting. Team members may have a slightly different view of the project and of the project stakeholders. They are thus able to identify people that should have a role in the project or at least be aware of it.
- collaboration to define the agenda. Team members may be aware of the schedule constraints of other team members and may also provide some hints related to the sequence of the topics.
- analysis of the documentation so that comments can be relevant and enable those who did not have a good grasp of the topics to gain a better understanding of the project scope. Team members may have different competences, backgrounds and perspectives on the same project. Testing the clarity and completeness of the documentation with them can increase the effectiveness of the kick-off meeting.
- supporting the project manager and the sponsor in the presentation of the project and its organizational aspects. Since one of the objectives of kick-off meetings is to increase the motivation and commitment to the project, involving team members in its organization and delegating the presentation of some contents can be wise.

The project manager does not always require help in preparing the kick-off meeting, but when this happens it is an excellent opportunity to improve one's knowledge of the project and provide useful skills to improve its subsequent management.

Response to the invitation and receiving the information

As in all meetings, much attention must be given to organizational and content-related aspects in order to obtain real benefits; it should therefore be planned well in advance so that all those required to participate will be available. Sometimes the date of the kick-off meeting is so close to when it was called that people already have prior engagements. In this case, it is a good idea for the project team member to clearly inform the project manager that the lack of participation is due to prior engagements that cannot be shifted as there is too little time between when the meeting was called and the kick-off date. Even in the case of possible partial participation, i.e. not for the entire kick-off meeting, it is a good idea to inform the project manager of the situation so that the project manager can change the order of the topics to be discussed so as to enable good participation.

There are no standard rules on the duration of a project kick-off meeting; the project team member may be asked for a commitment of one hour for fairly simple projects up to a commitment of one or two days for highly complex projects. The duration also depends on the level of involvement required during the kick-off meeting. At some kick-off meetings the main purpose is simply to share information while at other meetings decisions must be taken, and there are even meetings where social activities are performed to increase team morale, bonding and trust.

To make the kick-off effective, the project documentation must be made available and sent out before the meeting so that everyone has a chance to consult it and express any doubts or uncertainties during the meeting.

All the team members must conduct a detailed analysis of the information they are sent, as they will only be able to ask relevant questions in order to clarify obscure points if they have understood it well. Participants also have the right/duty to ask the project manager for additional information before the kick-off meeting if the invitation does not provide enough information on their role in the meeting, the topics that will be discussed and the contributions that may be provided.

All the team members are obliged to participate in these meetings because, as we shall see in more detail later, they will acquire information useful to understand the role that they must play within the organization of the project, its requirements and its structure.

However, poor sensitivity and a lack of strategic vision on the part of companies must be recorded as these opportunities for sharing are still uncommon, and without such organizational maturity team members will always have difficulty attaining a clear vision of the project.

Not participating in kick-off meetings damages both the project and those involved. Damage to the project comes from missing the opportunity to take in information that might be of interest to the different stakeholders, with the subsequent poor decision-making or forming of erroneous expectations. As is common in almost all projects, the more decisions or changes are delayed the more costly they are to implement, and it is therefore important to have valuable information as soon as possible.

Damage to those involved comes from two factors:

- the late communication of important information may create negative reactions in the other stakeholders, such as: “Seeing as you knew all these things, why didn't you bother to inform us of them immediately rather than afterwards?”;
- more difficulty in creating good contacts with the other stakeholders, contacts that may be useful as the project progresses. The kick-off meeting, if well managed, is in fact a highly social occasion and not being there may make it more difficult to integrate into the work team. This aspect is much more important when there are people who do not know each other.

In addition to stressing the importance of attending, also note that it is appropriate to suggest to the project manager the participation of other colleagues who may be able to provide a valid contribution. In fact, it often happens that the project manager, not being completely clear on the terms of the problem, does not invite individuals whose presence would be useful due to a lack of knowledge of their skills.

Presentation of the stakeholders and the organization of the project

In order that a project can be successful, it is important to remember that it is not comprised of a series of individuals but of a team, and a team that must operate as such.

A very common practice, in projects characterized by team members who do not know each other or collaborate occasionally, is mutual introduction. The introduction is not only a moment of politeness but it is useful for all stakeholders involved, allowing them to understand each other's characteristics and expectations for the project.

A typical introduction should cover the following points:

- the role held in the company;
- seniority;
- main expertise;
- personal expectations about the project, if the information sent out with the invitation made it possible to understand the project objectives.

A project has a greater chance of success if a good team is created. Creating the team is certainly the project manager's job, but it is not just up to him or her. In fact, it is possible to be a team because there is a desire to be a team. The project manager is an important facilitator, but if the team members do not want to collaborate it will be an uphill road. A good team also adopts rules and mechanisms that facilitate its cohesion. The right moment to define and share them is during the kick-off meeting.

The project team members' task will be to collaborate with the project manager, so that the team can be formed and is collaborative, through a discussion of and the sharing of general work rules. It must support the project manager in identifying

behaviors that differ from what should be expected and collaborate in the management of critical situations that may exist between one or more team members due to work conflicts and differences in character and opinions.

Only through understanding and harmony between the members of the project team it is possible to create team spirit.

Reading the project charter

A highly pragmatic and effective way to present and summarize the key information of the project is through the “project charter”, a preparatory and central aspect of the kick-off meeting. Preparatory because the project formally exists after the project charter is validated, and central because it contains the essential elements of the project.

Team members should be aware that the figures contained in a project charter are very often rough estimates. The focus of team members should be more on understanding the key characteristics of the projects, the project objectives and the project scope than discussing the single figures.

Discussion of the project

While the project manager must explain the project's basic characteristics, team members are required to play a particular role in order that the meeting is successful. They must in fact collect as much information as possible through the questions that arise from the analysis of the documentation previously sent out and from the presentations they took part in. The purpose of these questions is to obtain as much information as possible in order to successfully begin the activities they are responsible for. Typical questions include:

- Will the project be part of a more complex program?
- What priority should this project have in my agenda?
- Is the project charter definitive or is there a certain margin of flexibility?
- Has a description of the requirements been obtained from the needs analysis?
- Is the project team final or will there be changes?
- Are there specific project constraints?
- Have solutions already been predefined/imposed by third parties?
- Can the team work in a single location?
- Will part of the work be entrusted to external suppliers?
- Have the external suppliers already been identified?
- Are there privacy or security requirements?

PROJECT TEAM MEMBERS AND OTHER TYPES OF MEETINGS

While the kick-off meeting is one of the most important meetings, as mentioned in the introduction, other meetings occur during the project.

Meetings may be held just to inform stakeholders of important updates, to plan the next steps, and to discuss some issues in order to make a decision.

Without addressing every possible type of meeting, we can summarize the role of team members through a few behaviors:

- Being present at the meetings;
- If they are not able to attend, warning the project manager and asking for the documentation (or a call or a one-to-one meeting) in order to be fully up-to-date with the project;
- If possible (that is, if tolerated by the organization), providing feedback related to the perceived usefulness of the meeting to permit the project manager to improve the quality and increase the commitment of the project team. Unfortunately, too often meetings are quite useless and boring, and the people that organize them might be not aware of that;
- Contributing to the meeting. As seen while addressing the kick-off meeting, team members may be asked to provide documents, suggestions and feedback. The success of the meeting depends on how it has been planned as well as the interactions that happen while it is in progress. Many interactions are started by team members. If team members want to make a meeting successful they have some power in achieving this outcome;
- Being honest. This may be the most important point. If team members do not provide truthful information they put all the project estimates at stake, and this adds additional complexity and difficulties to already challenging and dynamic environments.

CONCLUSIONS

Too many people consider project meetings to be a complete waste of time. Sometimes they are indeed, but team members very often neglect the role they play in organizing and delivering successful meetings.

Meetings are time consuming and contributing to useless meetings is detrimental to all the participants and, in turn, to the project. Having a passive approach to project meetings means investing time in non-value added activities. For this reason team members should do their best to make them useful.

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About the Author



DR. MARCO SAMPIETRO

MILAN, ITALY



Marco Sampietro obtained a Ph.D. at the University of Bremen, Germany. Since 2000 he has been a professor at [SDA Bocconi School of Management](http://www.sdabocconi.it), Milan, Italy. SDA Bocconi School of Management is ranked among the top Business Schools in the world (Financial Times, Forbes, Bloomberg, and The Economist rankings). He is a Core Faculty Member at SDA Bocconi School of Management and teaches Project Management on the MBA – Master of Business Administration, and GEMBA – Global Executive Master of Business Administration programs. He is Faculty Member at [MISB](http://www.misb.in) – Mumbai International School of Business, the Indian subsidiary of Bocconi University, and Visiting Professor at IHU – International Hellenic University, Greece. He is also a Contract Professor at [Bocconi University](http://www.bocconiuniversity.it) and [Milano Fashion Institute](http://www.milanofashioninstitute.com) for the Project Management courses.

He was a speaker at the NASA Project Management Challenge 2007, 2008, and 2011, in the USA, and a speaker at the PMI Global European Congress, Italy, 2010. He is a Member of the Steering Committee of IPMA-Italy.

He is co-author and/or editor of 10 books on project management and 7 books on IT management. Among them: [Empowering Project Teams. Using Project Followership to Improve Performance. CRC Press, 2014.](#) Finally, he is the author of award-winning case studies and papers.

Dr. Sampietro can be contacted at: marco.sampietro@sdabocconi.it