

*The Road to Responsible Collaboration*¹

Part 7 Build a Delivery Organization²

Robin Hornby

Summary

In this series, Robin Hornby argues that the effectiveness of project management is improved by driving project responsibility into the organization and creating conditions favorable to 'responsible collaboration'. But this collaborative environment will not naturally fall into place without the support of senior management and the adoption of enabling frameworks, guidelines, and techniques. In this seventh and final article, Robin recaps the evolutionary project management improvements needed to support responsible collaboration and summarizes the steps needed to institutionalize a Delivery Organization.

Introduction

We have arrived at the end of the road. This series has explored what I believe is needed for owner/provider alignment and responsible collaboration. Good intentions are assured by discipline, so we must conclude our journey with a formal implementation. This begins the transition to organization-centric project management and our goal of a Delivery Organization.

The foundation for this implementation has been viewed from many different angles and is firm. To recap, this comprises: a universal business lifecycle, a high-level functional model of project management (PM), the acceptance by project participants of a common project lifecycle, and agreement on the principle of balanced responsibilities between owner and provider. There are operational options to be decided, but these are practice details and can be selected during implementation planning.

Perform a Candid Assessment

Although mountains do not have to be climbed, a degree of transformation in the project environment is expected, so change is easier for those who have already cleared some of the prerequisite steps. These steps, as a reminder, are as follows:

1. The PM Establishes a Mandate with the Owner
2. The Team Adopts Shared Objectives
3. The Provider Offers Uniform Project Support
4. The Owner Appoints a Project Sponsor.

¹ Editor's note: This series of articles is by Robin Hornby, author of four books including *A Concise Guide to Project Collaboration: Building a Delivery Organization* (Routledge 2023) and *Commercial Project Management: A Guide for Selling and Delivering Professional Services* (Routledge 2017). Learn more about the author in his profile at the end of this article.

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An impartial professional can easily confirm the organization has attained these steps. Progress will also be smoother for organizations who have a cadre of project managers (the PMs) with a solid grasp of PM processes. A reasonable degree of project maturity possessed by provider and owner/sponsor likewise promotes successful implementation. For example:

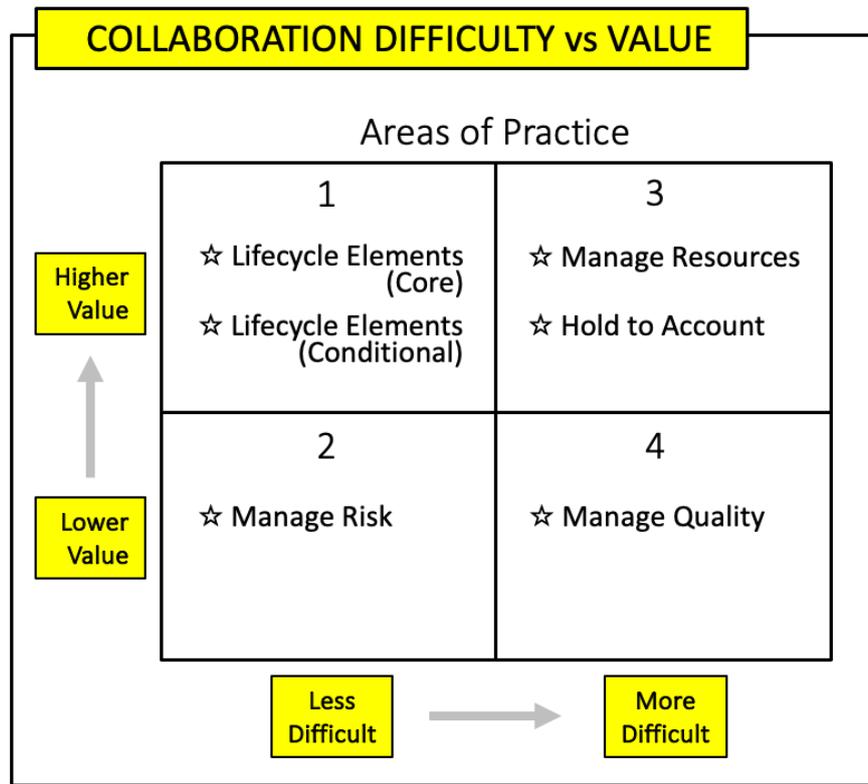
- The provider demonstrates an ability to assemble project teams and assign trained PMs. Chief among these tasks are hiring, ensuring team training and compatibility, preparing statements of role, assessing performance, managing team behavior, resolving conflict, coaching, and developing staff potential. Basic PM tools, techniques, and processes are understood and used.
- The owner appoints sponsors who understand the role. The sponsor must appreciate the essential rationale for the project and provide business leadership by describing the business benefits, managing their development, and eventually harvesting them. The sponsor is committed, champions the project with fellow executives, ensures project visibility, and has a basic grasp of the project process. Sponsors seeking a thorough account of an established PM process as it affects them may consult *A Project Sponsor's Warp-Speed Guide*¹.

These points describe the core attributes of a functioning project environment, regardless of collaboration skills, and I suggest at least a passing grade before progressing to the less familiar path of building a Delivery Organization.

Evaluate the Best Approach

One useful technique to help determine the implementation approach is to compare the expected difficulty in implementing a collaborative practice with the perceived value to the project work. An implementation sequence might then be based on starting with the higher value, lower difficulty practices. The graphic, Collaboration Difficulty vs Value, shows a mapping based on the 'average' organization. Things might look different in your own company, and it could be worthwhile to draw your own chart.

Another point to consider is that there is no imperative to do everything at once. Most collaborative practices can stand alone, so you can proceed with any degree of take-up and there is no penalty.



Here is a summary of the administrative and professional practices shown in the diagram:

Quadrant 1: Lifecycle Elements are collaborative tasks assigned to the PM and Collaborative Stakeholders (CSHs)² relevant to each stage of the business lifecycle³. I have characterised them as administrative because they generally determine how the project is organized, decisions are made, and approvals granted. They serve to strengthen owner/provider alignment and project integration. There are 22 of these elements and they are divided into core (essential) and conditional (usage might depend on circumstances).

Quadrant 2: Risk Management is a strong candidate for owner/provider collaboration and the techniques to be implemented fit seamlessly with the business lifecycle, making owner participation a natural evolution. Risk models are based on the concept of environmental risk factors for standardised planning, and on risk alerts for standardised execution management. These are easily adapted for collaborative risk assessment.

Quadrant 3: Accountability Management, or the lack of, has been a consistent contributor to project failures, at least in my experience of project recovery work. Practical techniques for responsibility assignment, supported by both owner and provider, are of great value and worth the implementation effort.

Collaborative Resource Management has historically been close to non-existent, yet would yield significant value for all projects. Techniques for collaborative resource planning are proposed for more mature organizations; unfortunately, joint management of on-going effort remains a challenging target.

Quadrant 4: Product and Project Quality Management has almost entirely defaulted as the provider's responsibility, despite being an obvious concern of the owner. A collaborative approach has historically proven elusive. Four models are proposed to rectify this, providing a framework for objective setting, deliverable acceptance, task specification, and trade-off management.

Complete the Implementation Plan

The plan should include at least these activities, in the following sequence:

1. **Get Organized:** The first step is to appoint a coordinator. If the results of the current assessment are positive, the next step is to carefully review the strategic foundation recapped in the introduction and ensure compatibility with the organization.
2. **Design and Develop:** Using the frameworks and templates detailed in the reference text⁴ will ease the effort to create tools for collaborative working. These are chosen from the administrative and professional practices summarised above. The plan may set forth either a subset of these, a series to be implemented in stages, or a full implementation. Almost certainly the effort starts with the administrative elements.
3. **Training:** Using available assets, training material is assembled and delivered to the PMs and potential CSHs. A session is no more than 2 hours and might be better described as familiarization. Additional tools can be developed such as a familiarization package supplied at project start-up, or a one page 'cheat sheet' given to CSHs when assigned.

Building a Delivery Organization is not a quick job, but do not over-plan it. Best to start with something straightforward, familiar from the company's experience, and meeting with general consensus. Proceed from there. Organizations vary in their cultures and priorities, so be prepared to customize the approach as needed.

Conclusion

Implementation plans lack glamor and can seem tedious. Nonetheless, such plans are a necessary step towards institutionalizing a collaborative approach to projects. Creating and reviewing these plans reveals the attitudes and prejudices of key players, allowing mitigations to be thought-out. Culture change is a likely side effect.

It may be surprising to find that many of the needed elements already exist in pockets of the organization and that minor rework is all that is required. And for those prepared to bring the resources of current technology and social media to the implementation game, many of the collaborative tools will be doubly effective and convincing.

Regardless of the approach to implementation, *A Concise Guide to Project Collaboration*⁴ is designed to meet the need for a practical template. It is aimed at corporate managers, not just the PMs. Managers need to understand the concept and its benefits and PMs will need a description of the techniques and methods.

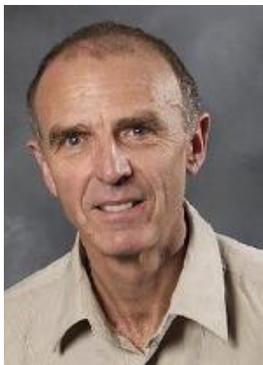
In the final analysis, like all change endeavors, the creation of an effective Delivery Organization relies not just on structural adjustments and new methods, but on individual participation, trust, and open communication. The results are worthwhile: delivery performance will significantly

improve and, as a bonus, the experience of working as part of a genuine team will improve job satisfaction for everyone.

References

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About the Author



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Robin Hornby worked in Information Technology for over 40 years, taught project management at Mount Royal University for 12 years and maintained a consulting practice. He worked across Canada and internationally, was a long-time holder of the PMP designation, and presented frequently at PMI symposia. He pioneered many delivery management practices and is the author of four books. His latest book titled [*A Concise Guide to Project Collaboration: Building a Delivery Organization*](#) was published in 2023 by Routledge. For more information, visit www.tmipm.com. Robin Hornby can be contacted at rhornby@shaw.ca