

Are you leading a project team for the first time?

My step-by-step guide to ensure excellent quality service even though you no longer perform the tasks ¹

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Abstract

Transitioning from being a team member to lead a team and a portfolio of projects can be both exciting and challenging, especially in terms of ensuring consistent quality in the project, as the leader will no longer perform many of the tasks.

This article is based on author's experience and aims to support the journey of first-time leaders, who might struggle feeling confident when they are no longer directly involved in daily operations.

It shares valuable lessons learned and provides effective strategies on how to lead teams, balancing leadership and operational excellence.

Body of Article

I had been involved in projects for some years and I enjoyed working in a team, planning, and developing the activities needed to successfully complete the goals of each project.

Suddenly one day, I was offered the opportunity to lead a team as the head of customer service department. Unexpected, but real; not executing, but leading; not one project but a whole portfolio of projects with several project managers and stakeholders involved.

It was my first-time leading teams, and I was certainly excited; one of my recurrent thoughts during those early days was how to know whether I was doing a good job. How to feel confident that the team was adding value and not just executing activities?

I was no longer directly involved in tasks or day-to-day operations, and at that time there were no mechanisms to monitor some important actions taken by the teams. This made me feel that quality was not completely under control as it was not possible to track the level of service in terms of response formats, reviewing deliverables, response times, consistency, and more.

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"What can I do in my new position to ensure quality service in our portfolio of projects, even though I'm not the one performing the tasks?"

Interacting with other colleagues, analyzing case studies and my own experience, I came to two conclusions:

1) Leading teams is not the same as doing tasks; establish mechanisms that help visualizing progress

In my new role, the job was to lead teams to deliver excellent customer service. The key word here is "lead" - I would no longer do many things directly, and the challenge was to establish mechanisms ensuring tasks were done properly (even though I would not be involved), while being certain that both the teams and the clients were satisfied with the outcome.

2) Feelings are not the same as certainty

Feelings are subjective, but quality must be objective in order to be able to measure and improve. As the saying attributed to Deming goes, *"Without data, you're just another person with an opinion."*

Feelings can't be visualized in a dashboard available to all teams, management and clients, where they can objectively see what the goal is, how it will be measured, and what percentage of progress is being achieved at any given moment.

So, I had to put feelings aside and define a solid method to track quality, progress and improvements covering the whole portfolio of projects.

A framework to lead people and projects, ensuring excellent quality service

Having these two central elements in mind, I developed the following framework with six gradual steps over time:

1) Identify the moments of truth with clients

"Moments of truth" are the touchpoints between the department and its clients, both internal and external. These interactions — whether conscious or unconscious — shape the client's perception of the service and the management of the company.

In other words, analyze when and how they interact with your area, with whom they interact, and what deliverables they receive (a conversation, a response, a document, products, services, etc.). You can create a table or database where you list the available data; always consult the team to ensure no important details are missed and that all the information is traced.

If you have very different deliverables or interactions with various clients, consider grouping them by theme or characteristics to give you a more holistic view (e.g., pricing information, quality certificates, spare parts management, invoice processing, etc.).

2) Establish objective indicators

For each client interaction, define an objective indicator that can be measured and set a timeline for achieving it (for example, one year). This way, you'll establish the level of quality you're aiming for.

If you think about it, what does "maintaining quality" mean without having a baseline to start from or a target to reach? Progress is always connected with a starting point and a goal to achieve.

3) Identify the current value of each indicator

For each line in your database that represents a client interaction, determine the current value of the indicator. This is your objective quality as of today—whether good or bad, it is what it is: your starting point.

"Knowing where you stand is the first step in identifying where you want to go."

4) Develop sustained action plans based on the indicators and available time

Work with your team and clients to ensure that the indicators make sense and truly reflect what they value and what meets their needs.

This will be incredibly useful in establishing action plans because you know where you currently stand, where you want to go, and how long it will take to get there.

Don't try to change everything all at once, as this could create confusion and frustration among your teams; resistance to change is a very human feeling, and a leader must know how to manage change effectively.

To do this, you can apply agile methodologies that you are already familiar with: try small actions, measure results, analyze, adapt, and continue applying lessons learned and feedback loops. Quick wins motivate the team and even though the goal isn't fully reached, they inspire and reinforce the feeling that you're on the right track. It's a virtuous cycle that breeds positivity.

When you look back some time later, you'll notice the difference these small changes made. If you try to change everything all at once, the team will become overwhelmed, reactive and frustrated. It's more effective to move forward step by step, but with a clear direction and steady progress.

5) Share the status of indicators and make them visible to everyone

Disseminate the results, discuss them, talk about them regularly, congratulate the teams for their progress, and show them that it matters... ensure that everyone is part of the improvement process and sees that his/her contribution helps achieve the common goal.

This is a powerful motivational factor, while also uniting the team because the objective is perceived as shared.

In this way, you won't be guided by feelings, but by data (and if those data are accompanied by client's compliments and positive feedback, the reinforcement is exponential).

6) Standardize each type of deliverable in terms of format and process

If it's standardized, it will be very easy to detect if something isn't going as expected, is off-track or deviating from the target.

Without a robust and standardized process, it's difficult to control the portfolio since everyone will do things their own way, making it unclear which approach is the correct one.

This would also result in you being both the team leader and having to deal with daily tasks, which isn't compatible with leading effectively.

The benefits of standardization are incredibly helpful to combine speed and consistency (*).

Conclusion

In my journey from project execution to lead a team and a portfolio of projects, I've learned that leading a team for the first time requires a shift from task execution to oversee people, projects and activities.

Leadership is not about doing everything, but about guiding and coaching the team, using data to measure progress and setting up systems that ensure consistent quality, even when you're no longer doing day-to-day tasks.

Reference

(*) Ancizu Beramendi, M. M. (2021). Want projects to move fast and robust? Try standardization, PM World Journal, Vol. XI, Issue III, March. <https://pmworldlibrary.net/wp-content/uploads/2022/03/pmwj115-Mar2022-Ancizu-want-projects-to-move-fast-and-robust-try-standardization.pdf>

About the Author



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Human leadership, Global Sustainable Projects, Renewable energy, Storyteller, Keynote speaker, Lifetime learner, Risk management, Standardization

Manuel Ancizu is passionate about human leadership, sustainable projects and people's motivations. Enjoys working in international multicultural environments and wants to have a positive impact in society.

Manuel graduated in Economics from University of Navarra and obtained an MBA from IESE Business School (Spain); he has also studied in CEIBS (China) and University Anahuac del Sur (Mexico). He holds a number of professional certificates such as the PMP by Project Management Institute, Lead Auditor in ISO 9001:2015 by IRCA Association and has also received training in Management of Development Projects and Risk Management by Interamerican Development Bank (IDB).

Manuel has lived in Spain, France, UK and Mexico; he currently works in the wind energy sector leading the quality management of Offshore projects. Manuel has been involved in wind energy renewable projects developed in different parts of the globe with external customers, as well as in internal projects of cultural transformation, IT and global processes.

Thanks to his experience, he has delivered training sessions, lectures and keynotes to a different number of institutions.

Manuel is a qualified member of the Spanish Standardization Body (UNE) and has been involved in the development of Standards and Norms in Projects, Programs and Portfolios; he has also participated in the translation of different ISO 21500 to Spanish language.

Manuel loves smiling, storytelling, dreaming and making ideas come true in a sustainable manner. Manuel lives in Pamplona, Spain and can be contacted at manuel@manuelancizu.com

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