

EXECUTE: PHASE 3

At the end of this module you'll be able to:

- Identify 2 positive outcomes of conflict
- Recognize the benefit to both the organization and the client of having several QA reviews
- List the 5 steps involved for changes to deliverables

When you hear or read the word *execute* in isolation, do you think:

Option A) Eliminate, assassinate, or... behead?

Option B): Carry out, accomplish, or in the world of project management, *do* the work you took so long to plan?

Feedback for Option A): Totally understandable, but no, not in this context. In project management, execute means to carry out, accomplish, or do the work you took so long to plan. Let's get to work.

Feedback for Option B): Correct. Let's get to work.

[REFLECTION SCREEN]:

The execute phase of the project management process is when all of our thorough planning from the last phase finally pays off. Web designs, storyboards, and scripts have been reviewed and signed-off by the client, and the work is getting underway. You, as the Project Manager (PM), are making sure everything is going according to plan and any changes are caught, reviewed and dealt with accordingly.

To better understand all that's happening during this phase, let's use a real life example. You're the PM and you're creating a website for a client that will host a number of other deliverables, such as eLearning modules, audio clips, and videos. After multiple meetings with the client and your team, several reviews and mock-ups, all aspects of the site design have been approved and the web developer has begun development.

Decide your next steps in the Execute phase:

Path A) Review project timelines, communicate with team members on the progress of the deliverables, and have team members (including yourself) perform Quality Assurance (QA) checks on each deliverable to ensure the quality of work is up to the client's standards.

Path B) Review project timelines, communicate with team members on the progress of the deliverables, and, to increase process efficiency, send prototypes of the deliverables to the client for a first review.

Feedback for Path A) This is one of the busiest project management phases because you'll be keeping tabs on many of the project's moving parts. The site is being built and you need to ensure the developer is matching the design to the storyboards. Are the colours right? Does it function as intended? This is

when you should also hold meetings with your team to keep track of progress, have the identified team members perform QA checks on the deliverables (sending the results of these checks to the developer to make changes), monitor issues, and try to eliminate any mistakes before the site is sent to the client for first review. Let's keep going.

Feedback for Path B) You need to keep close tabs on the deliverables to try and prevent mistakes and issues. The site is being built and you need to ensure the developer is matching the design against the storyboards. Are the colours right? Does it function as intended? These items should have been reviewed by you and the team in a QA checks before you sent the prototypes to the client. Unfortunately, in this case you didn't do a QA check before you sent the prototypes, and it turns out the site isn't functioning properly and the dark purple you agreed on for the banner on the page is now bright pink. Interestingly, your client not only likes the new colour but wants to keep it and change all secondary colours to complement it. While that alone is an easy fix, all your print material and additional resources are using the approved dark purple and can't be changed without time and expense. Time to meet the client and determine next steps.

Continuing on Path A: At this point, you might be wondering about the QA process, and specifically how 'quality' is defined in the context of eLearning. So let's see.

How would you define quality?

- 1) The standard of excellence as compared to similar things.
- 2) A high level of excellence as defined by experts.
- 3) The standard or degree of excellence as defined by the client.

Feedback for 1) True, but when delivering work, who says it meets the expectations of the client? In the context of eLearning, quality is defined as the standard or degree of excellence as defined by the client. Let's get back to work.

Feedback for 2) True, but when delivering work, who says it meets the expectations of the client? In the context of eLearning, quality is defined as the standard or degree of excellence as defined by the client. Let's get back to work.

Feedback for 3) True. It is the client who determines what quality is and the specifications that meets their needs. Let's get back to work.

[REFLECTION SCREEN]:

Like other processes, quality takes time to plan but planning quality helps to ensure that the:

- Quality of the deliverables are up to the client's standards.
- Approved design was fully executed according to plan, and
- Latest version of a deliverable being reviewed is up to the quality as defined by the client, which in the end reduces re-work, saving the team time and money.

Path B: At this point, you might be wondering about the QA process, and specifically how 'quality' is defined in the context of eLearning. So let's see.

How would you define quality?

1) The standard of excellence as compared to similar things.

2) A high level of excellence as defined by experts.

3) The standard or degree of excellence as defined by the client.

Feedback for 1) True, but when delivering work, who says it meets the expectations of the client? In the context of eLearning, quality is defined as the standard or degree of excellence as defined by the client. Let's get back to work.

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Path B) Before you meet with the client to discuss the new colour change request by the client, you review the project documents and confirm that the client signed off on the original colour. Regardless, the client is really happy with the new colour. So, you go into the meeting with two choices for the client to make. You explain that you can indeed change the colour, but at this stage it will require a change request and extra funds, as well as delay the delivery of the project. Alternatively, the client could agree to have the site reverted back to the original colour free of charge and the timeline won't be affected.

After the meeting, the client decides to leave it up to you to decide. So what will it be?

Option A) Go with the new colour

Option B) Go back to the original colour chosen

Feedback for Option A) If going with the new colour is what you think is best, you need to fill out a change request, and if your company has one, put it through a change control process. Reiterate that this will take time, and now your project is off track both in terms of schedule and money. Ensure that the client understands that. Let's move forward.

Feedback for Option B) With very little change to the schedule or budget, you have the colour changed back to the original that was approved, and move forward with the project as originally planned. Let's move forward.

Path B – Option A) Even after you've done your due diligence and explained to the client that choosing this option will incur additional costs, the client rejects the change request, stating that the delays are unacceptable and the costs are too high. They decide to cancel the project and go with another vendor who provided a lower quote for the change. It's a good lesson to learn that you should always perform QA checks prior to sending out deliverables to the client. Remember, it's cheaper to prevent mistakes than it is to correct them. Select here to start over. <end>

Path A) While your developer is creating the site and implementing the changes provided through internal QA checks and reviews, the project team members continue to work on the other deliverables.

What are you, the PM, doing?

Option A) Communicating with stakeholders about the progress of the project.

Option B) Looking for new projects to start.

Option C) Managing the team.

Option D) All of the above

Feedback for Option A): Yes, you should be communicating with stakeholders on a regular basis. Many people don't realize this, but the biggest part of a PM's job is communication, which takes up almost 90% of their time. But you should still be doing more than communicating with stakeholders. What else are you doing? Select here to try again.

Feedback for Option B): As a PM you may manage many projects or just one. If you're looking for new projects, you should still be doing more on your current project(s). Select here to try again.

Feedback for Option C): Yes, you are managing the team. This is always happening. But what else should you be doing? Select here to try again.

Feedback for Option D) That's correct. As the PM, you should be communicating with stakeholders on a regular basis, looking for new projects to start, and managing the team. Let's keep going.

[REFLECTION SCREEN]:

We're talking about 'managing', but what exactly do we mean? Well, you're managing the team by:

- Providing status updates through email/phone/in-person meetings to various stakeholders
- Ensuring QA checks are conducted
- Updating project documents
- Resolving conflict
- Performing change control

Path A: The project has been progressing well, and suddenly a conflict arises. First off, conflict is always viewed negatively, but it doesn't have to be, depending on how you as a PM deal with it. You discover that two of your team members are having an issue about mobile website design. Specifically, should the website use responsive design, meaning it will respond and change to look correct when using mobile

devices? One of your team members says no, the other says yes. Looking back at the project charter, there's nothing about responsive design for the website.

How do you proceed?

Option A) Decide to use responsive design on the landing page only.

Option B) Decide not to develop using responsive design in order to keep on schedule.

Option C) Call a team meeting to facilitate discussion and find a solution together.

Feedback from Option A) Compromise, in this context, is called smoothing. While you did resolve the conflict, the solution isn't to everyone's satisfaction. Beware of lingering issues because the team did not get to fully resolve their issues. All right, let's keep going. ([This is now Path C](#))

Feedback from Option B) Making your own decision, in this context, is called forcing. It gets the job done, but you still run the risk of issues being unresolved, and now you're a focal point for resentment and further discord. Let's get back to work and see how things pan out.

Feedback from Option C) Calling a meeting to facilitate discussion and find a solution together is the best choice. You allow the team members to brainstorm, and provide a forum where everyone can be heard with respect and understanding. Let's keep going.

[REFLECTION SCREEN]:

Fostering dialogue between the team members can lead to better performance, because:

- The team is allowed to acknowledge that there's an issue
- Issues are not left to fester
- It provides opportunities for members to express themselves and find creative solutions, and
- It challenges and helps organizations grow by removing outdated processes and practices

See, not all conflict leads to negative outcomes, but not doing anything about it can.

Path C) Unfortunately, by using the smoothing technique, the team members didn't fully resolve their issues. After some time, you see that the two team members are still having issues and it's starting to affect the entire team.

Now you have to:

Option A) Let them work it out on their own.

Option B) Bring in HR.

Option C) Call a team meeting to facilitate discussion and find a solution together.

Feedback for Option A) This should have been done before and now one of the team members quit. You have to find another media specialist and your project is now going to be late and the budget doesn't cover training new team members. The client isn't happy and your credibility is suffering. The client decides to cancel the project and go with another vendor. Select here to start over. <end>

Feedback for Option B) HR will help, but it shows that you didn't try to let them resolve the issues in the first place, and now the project is being reviewed by senior team members. HR helps to resolve the issues, but you have lost your credibility among your team as an effective leader, and due to time constraints you're replaced by another PM. Remember, conflict doesn't have to be negative, but not doing anything about it can be. Select here to start over. <end>

Feedback for Option C): Calling a meeting to facilitate discussion and find a solution together is the best choice. You allow the team members to brainstorm, and provide a forum where everyone can be heard with respect and understanding. Let's get back to it.

Path D) The forcing technique in conflict resolution rarely ends positively. You're making a decision without having your team buy into the resolution. While sometimes it is necessary, in this case you're not an expert in web development and your decision isn't appropriate for the project. After testing shows that the browser version (IE7 and up) that you recommended without testing first isn't going to work for this project, and now you have to go back to the team and solve the problem. You've lost time and your status as an effective PM is faltering.

To recover, you:

Option A) Defend your decision based on the knowledge you had and the information you were provided.

Option B) Call a team meeting to facilitate discussion and find a solution together.

Feedback for Option A) You're not a web developer and your decision has led to too many delays and added costs. You are replaced. Select here to start over. <end>

Feedback for Option B) Calling a meeting to facilitate discussion and find a solution together is the best choice. You allow the team members to brainstorm, and provide a forum where everyone can be heard with respect and understanding. Let's get back to it.

Part A) As the project moves along, you receive a call from your client who wants a discussion forum added to the website. You know from experience that it would take a maximum of two days to build this, which would push back your delivery date, but you do have the budget to accommodate it. You know that by accommodating the request, you'd be really pleasing your client; however, there's nothing in the project charter about building a discussion forum.

What do you do?

Option A) Do it to make your client happy.

Option B) Call a team meeting to discuss the implications to time, cost, and scope.

Option C) Refuse and tell the client it would be better to leave it for another phase of the project or a new project altogether.

Feedback from Option A) The client's request was out of scope as it wasn't in the project charter, and you've now changed the project deliverables. Any implications or issues weren't covered in the risk analysis or risk management plan, so it's time to speak with the client and update all plans, which now affects the budget. Always check the project charter and agreement before doing anything. Your decision

here and the affects it had on the project has led your organization to replace you with another PM. Select here to start over. <end>

Feedback from Option B) Calling a team meeting to discuss the implications to time, cost, and scope is always a good idea when things like this arise. Your team members are the experts. They can tell you first hand if a request like this will affect their work, the timeline, and by how much. They can also help identify any risks and how to deal with them. When new requests aren't listed in the project charter, you can work with the team to see the impact to time and cost and determine if it's possible for the current project. Always check the project charter and agreement before doing anything. While not always a bad choice, there was an actual better one. Select here to go back and try again.

Feedback from Option C) At this stage of the project, the best decision is to refuse the client's request, explaining that it's out of scope but to state that it's certainly something your team can handle in another phase of the project. Let's keep going.

[REFLECTION SCREEN]:

When it comes to changes to scope, time or budget, always make sure you:

- Get the request in writing.
- Check the project charter.
- Speak to the team to review the implications if the change is in scope.
- Have it approved or denied by senior levels.
- Document the outcome in all logs and plans.

[FINAL SCREEN]:

The Execute phase is one of the most challenging but interesting phases of project management. You wear many hats all at the same time and need to stay ahead of issues, changes and conflicts that can potentially affect your project. That is why communicating with the team and client is key.

Are you ready for the next phase?