

All Aboard...

The project kick-off has just completed and everyone is excited and optimistic. The project management team has gotten to know each other through social and workshop events. Morale is high with everyone fully aligned—and then we turn the project over to people who weren't there and have no idea why this project is different from the last ten projects they worked on. Although this doesn't make any sense, it happens all the time.

We know on-boarding is important, yet we often leave it to chance. But the teams that emphasize on-boarding fare much better. The most successful teams we have worked with take on-boarding seriously and extend it to everyone involved in the project— often including critical stakeholders who are outside the traditional project group.

There is interesting research indicating that most firms on-board incorrectly. The first several days that a new employee spends with an organization is a crucial, never-to-be-repeated opportunity for creating a powerful connection between the new employee, the organization and the work they will do together. Yet this opportunity is wasted addressing administrative or HR matters, computer training, and explaining work rules. These are important, but they aren't the first thing you should do. The critical initial time should be used to communicate the mission of the organization, its values, and how the new employee/participant can contribute to the organization. The same approach should be used with project on-boarding. With this in mind, we recommend that on-boarding:

1. Focus on why the project exists. For instance, in a hospital project you could focus on how the project will allow physicians and nurses to better heal people. You might want to have a nurse or someone similar participate in the initial discussion. I would also suggest an interactive values exercise, such as we do with project teams. You might then compare the values generated to the project's mission statement/values matrix. We want to assure that everyone on the team understands what the organization is trying to achieve.
2. Explain what an IPD project is, why IPD is being used, what the differences are between an IPD project and a traditional project.



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3. Demonstrate project value. It is important for everyone to know why the project is being built. If it is a service facility, like a hospital or a school, have information (videos are good) from the users explaining how the project will allow them to do their jobs better. In hospitals, we ask the care givers to explain the importance of the project. Even if the project does not have such an obvious, positive value, you can stress how developing a successful IPD project can change the industry. The bottom line is that everyone wants to feel that what they are doing has value.
4. Focus on how the person can contribute to the project. What experience and skills do they bring? What about their personality will allow them to help a team? Have them share stories of something they did contributing to a team. Have them speculate (with some direction) on how they will have to act differently.
5. Use team exercises. Choose something useful, perhaps focusing on how a task will be done and get the team to analyze the task and suggest improvements. Draw the distinction between individual success and project success. Work on continuous improvement. This can be a good opportunity to use simulations, Last Planner™ coaching and can provide “teaching moments” for how to lead high performance teams. Learning should be an active experience.
6. Have team members list what they have liked about past projects and what they haven’t liked or hasn’t gone well. Have a group exercise to identify how to avoid the bad and enforce the good. You might role play scenarios. Seed the groups, if possible, with others who have real IPD experience and can tell “war stories” about how the projects went. It would be good to have someone emphasize the “fun” aspect.
7. Take care of the administrative details.
8. Revisit with teams after a short period of time to determine if they are sliding back to conventional behavior and to learn whether they think the project is being run as was described in the on-boarding. Based on this information, adjust and make changes.
9. Reinforce on-boarding through big room visuals and daily huddles.
10. Make on-boarding effective, efficient, and consistent. On-boarding can be made more efficient if you have a common set of materials, videos, etc. that can be reused whenever a new group needs to be on-boarded. Video of earlier training sessions (edited to the relevant material) can be engaging and efficient. Not everyone is a good on-boarding leader. You should probably have a single group doing on boarding or at least “train the trainers.”

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