

## The future of project teams

*"Organisations used to be perceived as gigantic pieces of engineering,  
with largely inter-changeable human parts"*  
Charles Handy (1989)

Sometime in the mid-1980's, the type of project team in which I had started my IT career quietly disappeared. It was replaced by a new form of team that has become the norm for most of the business and IT project teams that we now work with ...the Ad-hoc team.

The Ad-hoc team is a group of people who work together but have complex reporting lines and allegiances outside the basic team group and who are often members of multiple teams and groups.

Surprisingly, there has been little attention paid to this new form of team by the gurus of organization and management theory. While the recent work of researchers such as John Katzenbach and Douglas Smith (1993), Doug Mankin, Susan Cohen and Tora Bikson (1996) and Anne Marie Caracciolo (2000) continues to develop the body of knowledge for teams and team work, the focus of these popular books is still on what we will term "traditional" teams.

In addition, the rise of Virtual teams (which generally are teams that are geographically separated driven by cost-reduction and offshoring) has further complicated the development of a theoretical and practical framework for understanding and working in Ad-hoc teams. While there are a substantial number of books, papers and Web-sites devoted to Virtual teams, most of these focus on technology rather than people or team structure issues.

As the impact of the 2009 global economic crisis continues to challenge the prevailing management models, a small group of innovative organizations are using the crisis as a catalyst to creatively implement radical change. These changes include strategic direction, management paradigms, operating models and people and team dynamics.

Coupled with the need for radical change, the shortcomings of Ad-hoc teams (covered in this paper) have created an environment where the role of project teams in driving and delivering long-term change is now a focus for executives and project managers who are prepared to challenge existing beliefs<sup>1</sup>.

### **Same name - different teams**

The term "team" is an extremely complex and confused concept. In fact, it has been so overused that, in most cases, it has lost any real meaning.

As Michael Schrage, in his book *No More Teams* (1989) states it:

*More often than not, a "team" is as much a political entity as a value creating one. The word is too flexible, too malleable, too manipulable.*

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<sup>1</sup> Gary Hamel (2007) and a number of leading management experts believe that the dominance of 20<sup>th</sup> Century management paradigms, models and beliefs has been a major cause of organization failure to cope with the rapid change of the 21<sup>st</sup> Century.

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Even so, the image and behavior of the high-performing team has become the stuff of contemporary mythology. From Mrs. Peel and Mr. Steed of *The Avengers*, James T. Kirk, Spock and the other members of the *Star Trek* team, Gene Kranz and the NASA team in *Apollo 13*, the various *C.S.I.* teams to Dana Scully and Fox Mulder of the *X-Files* team, the complex interplay and bonding between the team members has often been more interesting than the specific challenge facing the team.

Indeed, the media mythology of teams has, more often than not, simply added to the confusion surrounding the concept of a team. Does the macho interplay between “Hannibal” Smith and the A-Team result in the A-Team being a more effective team than the X-Files team where there is constant conflict between Scully’s scientific rationalism and Mulder’s emotional and personal commitment to pursuing “the truth that is out there”? Are the Three Stooges a team given that they spent most of their time beating each other up and yet the team survived the various replacements such as Shemp, Curly and so on?

### So, what is a team?

Most people agree that a team is somehow *more* than just a group of people. Larry Constantine whose groundbreaking work on team typologies or paradigms (1990) developed this elegant diagram (Figure 1) to show the different nature of groups of people.

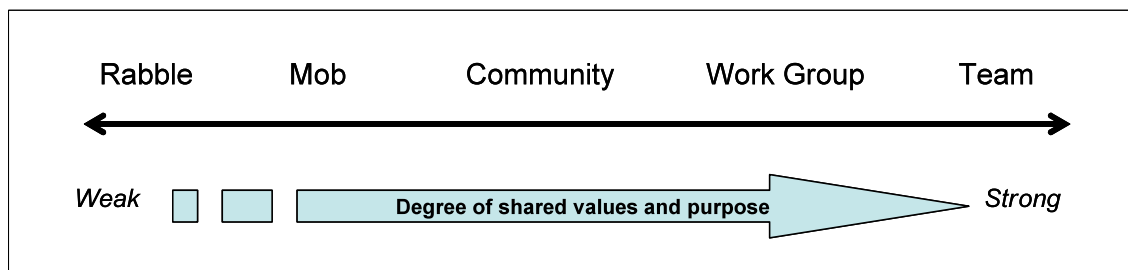


Fig.1 – The spectrum of groups (from Constantine)

Borrowing from General Systems Theory, we believe that:

*A team is a group of people where the whole is more than the sum of the parts.*

In effect, as shown in Figure 2 (next page), there is an additional component in a *team* of two people as distinct from just two people. The additional component is the *relationship* between the people - the “glue” of the team. Often, this is called synergy or synchronicity.

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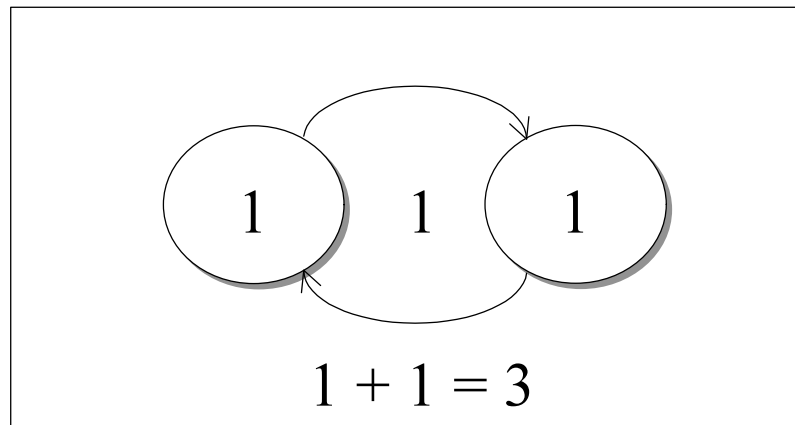


Fig. 2 - A couple is a triple

This intangible “glue” binds the individuals into a whole, where the individual skills, knowledge and expertise of the team members seem to complement and enhance each other. As a result, the performance of the whole group is greater as the synergy between team members adds another dimension to the team. The nature of this “glue” has been studied, discussed, analyzed and researched for years. Carl Larson and Frank LaFasto (1989) in their landmark study of excellent teams drawn from teams as diverse as the Mt Everest Expedition of 1985 to the Boeing 747 team identified eight clear characteristics of high-performing teams:

1. A clear, elevating goal;
2. Results-driven structure;
3. Competent team members;
4. Unified commitment;
5. Collaborative climate;
6. Standards of excellence;
7. External support and recognition; and
8. Principled leadership.

In effect, these characteristics are required for the “glue” of a team to emerge and grow. As we’ll discuss later, while all characteristics must be present for a really powerful team to form, the characteristic of Unified Commitment or “team spirit” is the key one in the changing nature of teams. Larson and LaFasto also argue that this characteristic is the key distinguishing feature between a *group* of people and a *team* of people. They cite Dr. Don Wukasch who, as a member of one of the teams studied, stated:

*“Nothing was as important for me as being on that team.... It was a total commitment...”*

In examining the dimension of Unified Commitment, Larson and LaFasto identify three key factors that, in our experience, characterize a true team. They cite the willingness of team members to undertake extraordinary effort to assist the team in achieving its goals and they explore the complex relationship between the individual team member and the team itself:

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*There is a blurring of the boundaries between self and others - an increase in emotional commerce, an open exchange between self and others.*

In our terms, this emotional commerce is the “glue” that enables the whole team to be more than the sum of the individuals in the team.

The final key factor that we have found in effective teams is contained in the need for a team to build a “micro-culture” that reflects the uniqueness of the team.

While we’ll explore this factor in more detail later, the concept of “micro-cultures” is the combination of shared values, beliefs and behaviors that the team develops and nurtures.

While Larson and La Fasto’s model provides a powerful insight into building effective teams, we believe that the work of Dr Meredith Belbin (2004) on leadership roles is also critical in understanding teams. Belbin’s research showed that high-performing teams had a mix of people whose preferred leadership roles provide different but complimentary approaches to leadership of the team.

These roles are:

- ◆ Coordinator - Controlling the way in which a team moves forward towards the group objectives by proactive involvement of all team members and making the best use of team resources;
- ◆ Shaper - Shaping the way in which team effort is applied, directing attention, seeking to impose some shape or pattern on group discussion and on the outcome of group activities;
- ◆ Monitor-Evaluator (1) Analyzing problems in a practical manner; (2) evaluating ideas and suggestions so that the team is better placed to take balanced decisions;
- ◆ Resource Investigator - Exploring and reporting on ideas, developments and resources outside the group; creating external contacts that may be useful to the team and conducting any subsequent negotiations;
- ◆ Implementer - (1) Turning concepts and plans into practical working procedures; (2) carrying out agreed plans systematically and efficiently;

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- ◆ Team Worker - Supporting members in their strengths (e.g. building on suggestions), understanding and supporting team members in their shortcomings, improving communications between members and fostering team spirit generally;
- ◆ Plant - Advancing new ideas and strategies with special attention to major issues and looking for possible new approaches to the problems with which the group is confronted;
- ◆ Specialist<sup>2</sup> - Providing technical direction in team work, directing purely on technical expertise; seeking to impose some shape or pattern on group discussion and on the outcome of group activities based on technical issues;
- ◆ Completer/Finisher - Ensuring that the team is protected as far as possible from mistakes of both commission and omission; actively searching for aspects of work which need a more than usual degree of attention; and maintaining a sense of urgency within the team.

Our own experience in exploring and implementing teams in many organizations supports Belbin's belief that leadership is not primarily resident in one person but rather shifts between team members depending upon the particular situation or problem facing the team. In a well-designed and effective team, each team member provides a set of different team/leadership roles and for a team to be effective a mix of roles and leadership is required. In general, most people can undertake only *two* or *three* of the above roles effectively. For example, a person could provide the Coordinator, Team Worker and Resource Investigator roles while another could provide Implementer, Completer and Monitor-Evaluator roles.

What is conclusive is that a team without all these leadership roles available<sup>3</sup> at various times of crisis would fall apart and would never be a high-performing team.

An effective mix of leadership roles is another critical part of the "glue" of great teams.

The *key* point in understanding teams is that they are not formed by simply focusing on the requisite technical skills of the potential team members.

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<sup>2</sup> We prefer the term "Technical Shaper" for this role.

<sup>3</sup> The roles of Coordinator and Shaper are both dominant roles and one only is required for a team.

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Effective teams are *built* through understanding and working in the inter-personal dimension as well as the technical dimension. Most importantly, effective teams need to be invested in and supported continuously.

### Two very different teams

While there are many variations on teams (i.e. sports teams, work teams), we make a clear distinction between two totally different forms of teams. These teams are different because they undertake very different types of work.

#### *Process teams*

Process teams are teams of people who undertake routine and standardized activities or tasks<sup>4</sup>. As we have discussed in other forums (Thomsett, 1985), process work is the most common form of work. It exists in all organizations and has the following structure:

- ◆ it is predictable;
- ◆ it repeats;
- ◆ it is standardized;
- ◆ it takes a short time to conclude;
- ◆ it maintains the status quo of organizational processes.

#### **A team is a team is a ...**

The massive gap between process and project teams is still alive in the brave new world of Virtual teams. There are almost no similarities between a Virtual team processing insurance claims in the US with back-end processing in India and a project team developing complex Web-based software with the business analysts based in the US and the programmers based in India. For example, the processing of insurance claims is routine and relatively non-creative whereas the development of software is typically dynamic and creative.

Examples of process work include most factory and assembly-line work, bank and insurance office work, hospital work, clerical work and so on.

Many organizations have used teamwork to improve the efficiency and effectiveness of process work. In fact, most of the pioneering groundwork in teams and team formation by innovators such as Fred Emery and Eric Trist in the 1950's, came from process teams in mining and manufacturing.

#### *Project teams*

Project teams are fundamentally different from process teams. Project teams undertake project work and, by nature, this work is creative, dynamic and non-routine.

Project work is the exact opposite of process work. It has the following patterns:

- ◆ it is un-predictable;
- ◆ it is unique;
- ◆ it is difficult to standardize;
- ◆ it takes a long time to conclude;
- ◆ it changes the status quo of organizational processes.

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<sup>4</sup> Mankin, Cohen and Bikson (op cit) call these teams *work* teams and increasingly they are known as process teams.

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Examples of project work include most IT work, film-making and other artistic events, strategic planning, business process re-engineering and research and development.

Project teams have always been different to process teams but, with the exception of pioneering work in the 1970's by Gerry Weinberg (op cit), Larry Constantine (1995) and our group (Thomsett, 1980), project teams have generally been ignored by mainstream organization and management gurus<sup>5</sup>. Most management experts either ignore project teams or focus on process teams or, alternatively, confuse both types of teams as the same team type.

### Weinberg's Pioneering Work

No examination of project teams, especially those in IT, would be complete without recognizing the invaluable contribution to the understanding of teams and leadership made by Gerry Weinberg. His classic work, *The Psychology of Computer Programming* (1971) was recently republished as *The Psychology of Computer Programming: Silver Anniversary Edition* (1998). Gerry was the first to recognize, as Belbin documented some 10 years later, that team leadership and team structures were not static but rather shifted depending upon skills and situations.

As shown in Figure 3, the Ad-hoc team is primarily a project-related team structure though we have observed some Cross-functional teams, which exhibit Ad-hoc dynamics. In general, Process, Functional and some Cross-functional teams are more like traditional teams (see later).

The critical distinction is that project teams require high degrees of creativity and collaboration whereas pure process teams require low degrees of creativity and collaboration (in effect, process teams are ideal candidates for outsourcing and the Virtual model).

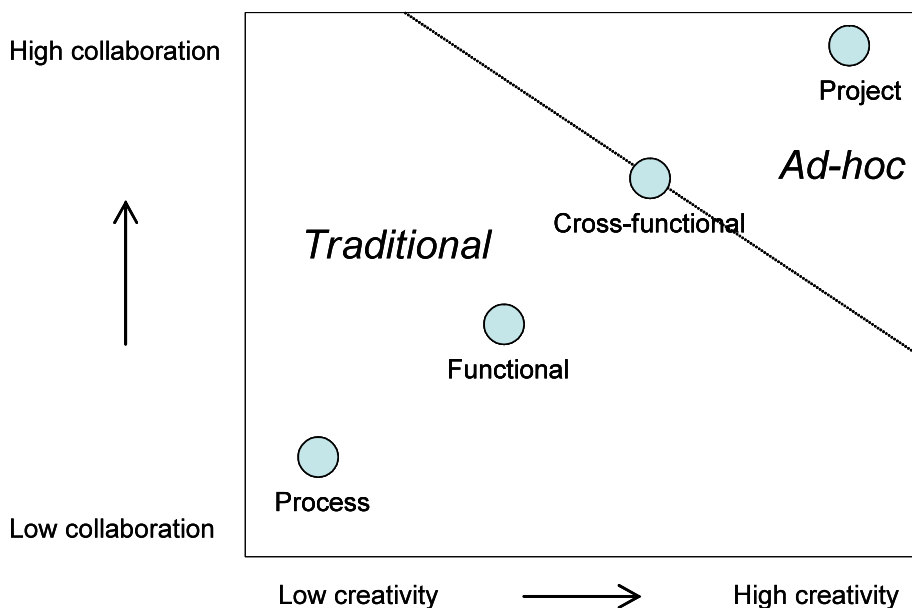


Fig. 3 - Teams and collaboration/creativity

In this Paper, we are dealing primarily with project teams.

<sup>5</sup> To be fair, Tom Peters finally "discovered" the world of projects and project team in his fourth book, *Liberation Management* (1997), some 10 years after his *In Search of Excellence*.

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## The project team I grew up in - a traditional team

The project team in which I learnt about teams was formed in 1972. The key members of the team stayed together as a team from 1972 to 1979. We undertook numerous projects and we learned together from each project. We also shared many workshops on building better inter-personal and team processes as well as the usual technical skill education.

We learnt, through a combination of often, bitter experience and external facilitation, how to accept the weaknesses of each team member and how to best use their strengths. It was a difficult and long journey but finally we had a real team where the whole was more than the sum of the parts.

Our team was built on the "soft glue" of:

- ◆ loyalty to the team;
- ◆ trust between team members;
- ◆ friendship between team members;
- ◆ shared experience;
- ◆ shared vision; and
- ◆ shared belief systems;

and, most importantly, our team became more effective and efficient as we learnt how to become a team. It was a traditional team, a project team and it exhibited the Unified Commitment identified by Larson and LaFasto.

In addition, we had all the Belbin leadership roles covered by various team members and, as in all great teams, leadership shifted between team members in response to the particular issue facing our team.

### *Traditional Team Culture*

In retrospect, our team developed its own micro-culture that, in many ways, was completely divergent from the culture of the broader organization (a government department) in which we worked. For example, while we worked for a classic bureaucracy and within a hierarchical leadership structure, we operated as a non-bureaucratic (indeed rule-breaking) team and managed in a flat and shifting leadership model.

As we'll discuss later in this Report, our micro-culture was not formally prescribed or written down, it just evolved over time. New members to the team quickly learnt "how we did things around here".

#### **What is organization culture?**

Most experts agree that organization culture is a complex combination of beliefs, values, behaviors or rules, symbols and rituals. Taken together, these elements form a common bond between people. They provide a framework for making decisions, reward/punishment and ensuring some degree of conformity. In many organizations, the culture is often described in Mission or Value statements. In other organizations, the culture is more subtle and requires observation of "what is acceptable or not". Rob Goffee and Gareth Jones' *The Character of a Corporation* (2003) is a great introduction to corporate and team culture.

In spite of the differences between our micro-culture and the macro-culture within which we operated we managed to survive for 7 years.

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## The emerging team environment

Our team was the product of an organizational environment that has long since disappeared. In the 1960 and 70's, belief in concepts such as jobs for life and corporate loyalty were accepted as the norm. In addition, many organizations provided a "corporate family" for their employees and, as documented by many management experts, the rules of the school were really simple. Look after your organization and it will look after you<sup>6</sup>.

As a result, there was a generally stable organization structure and culture, which meant that long-term investments could be and were made in building the skills and knowledge of the people and their teams. In addition, the relative stability and security of employment meant that personnel turnover was low and when it did occur, it was well planned.

Since the 90's, the organizational environment has become more complex, more turbulent and more chaotic. The factors that have been driving this increasing turbulence include:

- ◆ Globalization;
- ◆ Economic rationalism;
- ◆ Technology;
- ◆ Outsourcing/Offshoring;
- ◆ The demand for 24/7 processing; and
- ◆ The rise of Generation X and the decline of Baby-Boomers.

As well documented by experts such as Peter Drucker (Hesselbein, Goldsmith, Beckhard, 1997), Charles Handy (1987) and many others, one of the side-effects of the new organization environment is that corporate loyalty and careers for life are no longer accepted dogma. As Handy states:

*Under the old order ... the contract was clear: the organization (and its workers) was not only an instrument but a piece of property to be disposed of. A new contract will probably forgo the language of property in favor of talking about membership, associates and investors"*<sup>7</sup>

An excellent example of the new corporate reality can be seen in one of our favorite magazines, *Fast Company*. In the August/September 1997 and December/January 1998 issues, *Fast Company* headlined two "state of the art" pieces. The first was from Tom Peters called "A Brand Called You". In a wonderful revision of the famous team statement "There is no I in team", Peters argues that "There is a You in team" and that the focus of people must be on their own career interests rather than that of others or of the organization. In the December/January issue, Daniel Pink describes the concept of Free Agents or, in more conventional terms, corporate mercenaries<sup>8</sup>. In *Fast Company's* terms, Free Agents are people who understand:

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<sup>6</sup> This concept is termed a social contract by organization theorists.

<sup>8</sup> The term that *Fast Company* offers as an alternative for Free Agents is "condottiere" which is the Italian term for soldiers who traveled Europe fighting for any sovereign who would pay them.

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*The old social contract didn't have a clause for introspection. It was much simpler than that. You gave loyalty [to the company]. You got security. But now that the old contract has been repealed, people are examining both its basic terms and its implicit conditions.*

Nina Munk in an article entitled "The New Organization Man" in *Fortune*<sup>9</sup> parallels the conclusions reached in the *Fast Company* articles, quoting from a senior in a U.S. university:

*"My dad worked for Sears for 19 years as a security guard, and he was laid off. I have to position myself so that I can constantly look out for myself. I have to be self-serving."*

These views are typical of those of the members of the Ad-hoc teams with which we are familiar.

These concepts are not new and, in fact, were first proposed in 1989 by Charles Handy in his seminal *The Age of Unreason*. In that book, Handy argued for people to adopt the concept of work, not as an upward and hierarchical career in one organization, but rather, as a horizontal portfolio of different jobs for different organizations.

The new team environment also includes the additional factors of continuous re-structuring, outsourcing and dynamic planning driven by increasing competition and technological innovation.

The other major driving force for new team structures was the increasing sub-specialization of business and information skills. Traditional project teams were based on a group of people who possessed the requisite skills to undertake the project work. Only a decade ago, the "typical" IT team would need access to a project manager, a systems analyst, a data modeler, a couple of COBOL programmers, a documentation expert and perhaps, a tester. Now, the range and complexity of technical issues, development platform concerns, higher business group participation, G.U.I. and prototyping requirements, business process redesign considerations, change management, complex network and data-base design, implementation factors and so on had vastly increased the range and sophistication of skills required for successful product and system development. As a result, few teams can permanently accommodate all skills required so, the flexibility of the Ad-hoc team has given it an edge.

The challenge had become how to build teams when team members are encouraged by Peters and other experts in the following terms:

*We are the CEOs of our own companies. Me Inc.*

In addition, the challenge was to build teams on a shifting bedrock of low organization loyalty, high staff turnover, sub-specialization and increasing outsourcing<sup>10</sup>.

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Since the beginning of this organizational sea-change in the late 1980's, the subsequent Internet bubble and burst, increasing globalization, outsourcing and the Global Economic crisis of 2008/9 have done little to change the move in the majority of organizations towards a more "arms-length" social contract between individuals and organizations.

In his excellent *Outsource: Competing in the Global Productivity Race*, Ed Yourdon (2005) suggests some survival strategies for people who are facing the direct impact of their jobs being outsourced. These include:

- ◆ be prepared to work harder;
- ◆ be prepared to relocate; and
- ◆ consider going out on your own.

Me Inc is alive and healthy in 2009 and the new team structures have to stretch across international borders and cultures.

### The project team of today - the Ad-hoc team

So, we now have a new concept of teams - the Ad-hoc team. An Ad-hoc team is completely different from the traditional teams studied by Larson, LaFasto and other experts.

*An Ad-hoc team is a team of Free Agents where the whole is the sum of the parts<sup>11</sup>.*

In effect, a Ad-hoc team is a team of people who place their commitment to themselves *above* their commitment to the team. As shown in Figure 4, the relationship or "glue" between team members is not based on a personal relationship or, in Larson and LaFastos' terms emotional commerce, but rather, on a formal or informal professional relationship.

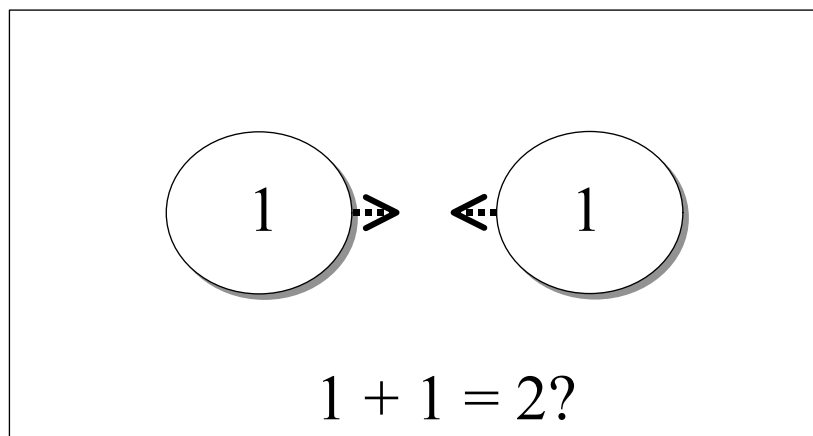


Fig.4 - An Ad-hoc relationship

<sup>10</sup> We discuss the outsourcing phenomenon in a related article which you can access on our Web Site : [www.thomsett.com.au](http://www.thomsett.com.au).

<sup>11</sup> This is the best case – we have observed many Ad-hoc teams where the whole is *less* than the sum of the parts.

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## *So, what is really different?*

There are a number of critical differences between an Ad-hoc team and the traditional team. Examining the characteristics identified by Larson and LaFasto, the successful Ad-hoc team has two very significant differences:

1. A clear, elevating goal;
2. Results-driven structure;
3. Competent team members;
4. *Arms-length commitment*;
5. *Specialist climate*;
6. Standards of excellence;
7. External support and recognition;  
and
8. Principled leadership.

### **A team test**

You are the leader of a project team and you have discovered that your project is behind schedule. You must re-schedule critical tasks and you need your team members to radically alter their work commitments. Do your team members:

1. Agree to the rescheduling, as you are their boss and the whole team's success matters to them? or
2. Agree provisionally to the rescheduling but they make it clear that they have to confirm their new schedule with their own group and/or boss?

If you answer [1], you have a traditional team. If you answer [2], you have an Ad-hoc team.

The two key differences are the nature of the commitment of the Ad-hoc team members to the team as a group of people, as distinct from, the commitment to the goals of the project. The commitment of Ad-hoc team members is, first and foremost, to themselves *not* the other members of the team. Indeed, most Ad-hoc team members will place their commitment to their "home" group or company above that to the team members<sup>12</sup>. In effect, team loyalty finishes a very poor last in the relationship and commitment stakes (see Figure 5).

### **The Apprentice**

Many people now associate a "team" with the collection of aggressive people competing with each other in a series of "project teams". In every sense, these teams that we watch on The Apprentice are nothing more than extreme examples of Ad-hoc teams. Just as Trump and the TV producers have distorted the concept of team in many people's minds, he has also managed to create a mutant version of what project management is as well. Welcome to "dumbing down".

Secondly, Ad-hoc team members are chosen for their technical skills not their "soft"<sup>13</sup> skills or Belbin leadership roles. This results in the replacement of a collaborative climate with a specialist climate. In other words, rather than the team building on both the strengths *and* weaknesses of each team member, the team is built on the specialist strengths only of each team member. To put it crudely, whereas a traditional project or team leader is held responsible for

providing both personal and professional development to build on the strengths and reduce the weaknesses of his or her team members, the Ad-hoc team member is simply concerned with the strengths. If a contractor is hired and it becomes apparent that that person lacks the expected skills, they would be fired or replaced.

In this new environment, there is no or little sense of true "team-ness".

<sup>12</sup> As Abraham Maslow observed in the late 1950's, people are motivated by a need for esteem within a social or work group. In Ad-hoc teams, the need is satisfied within the competency group rather than the project team.

<sup>13</sup> A wonderful insight made by a colleague of ours, Three (yes that is his name) at a Cutter Summit was that the people who call people skills "soft" are the people who never have had to master them.

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While this may appear a very harsh assessment, the typical Ad-hoc team that our group works with has the following dimensions.

The team members are drawn from various expert and stakeholder groups. Team members will often be consultants or contractors who work for external organizations. In addition, many team members will have either part-time or ad-hoc commitment to the team and the project. In most cases, the only "normal" (in the sense of full-time and fully committed) member of the team is the project manager. In extreme cases such as Virtual teams, the "team members" are in different physical locations, time zones and cultures.

As a result, the inter-personal process that we believe is essential for building the traditional team is completely absent. In most Ad-hoc teams that we have worked with or observed, there is:

- little or no loyalty to the team;
- trust between team members is limited to professional skills;
- no friendship between team members;
- little shared experience;
- little shared vision; and
- varied belief systems.

Simply, there is no Unified Commitment. The impact of a lack of Unified Commitment needs to be explored a little further.

### *Increased Conflict*

The absence of a sense of team-ness or team spirit raises significantly the potential for conflict between team members. It is the norm in Ad-hoc teams for team members to have multiple reporting and authority channels as distinct from the simpler reporting and authority channels in traditional teams.

For example, an Ad-hoc team member works for a major consulting organization. The project manager requires the team to work some additional time to catch-up on reworking analysis requirements. What is required is one night of 2-3 hours work. While the consulting group team member is only too happy to work the additional hours to help out the project, their consulting company has a operating principle of no free work. As a result, the project manager has to engage the additional effort required to negotiate a minor contract variation to get the team member to work the 2-3 hours of additional time (which of course is billed at full rate).

In a traditional team, given the shared loyalty to the team, the additional work would be simply given at "no cost" to help the team out. While the additional time should be recorded as part of the cost of the project, the issue here is the level and complexity of negotiation required on the part of the project manager to arrange for the team member to work that time.

Of course, this simple example is typical of the complex multiple layers of conflict that can exist in a Ad-hoc team. Another example of the increased levels of conflict in Ad-hoc teams arises when the solution that is perceived best for the project requires a technical team member to deploy a technology that is

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in conflict with the stated technical platforms approved by the technical team members "home" group.

As shown in Figure 5, while the team may be Ad-hoc, the inherent conflict of priorities and interest are very real and complex. In a traditional team, the reporting as well as the formal "line" authority lines were within the team and centered on the project manager or team leader. The project manager was the primary person for communication and reporting outside the team. In an Ad-hoc team, while the project reporting lines are still within the team, the formal authority lines are outside the team to other managers. Simply, in traditional teams there was one "boss". In Ad-hoc teams, there are multiple "bosses" and team manager or project manager is just one of them (albeit with little direct authority).

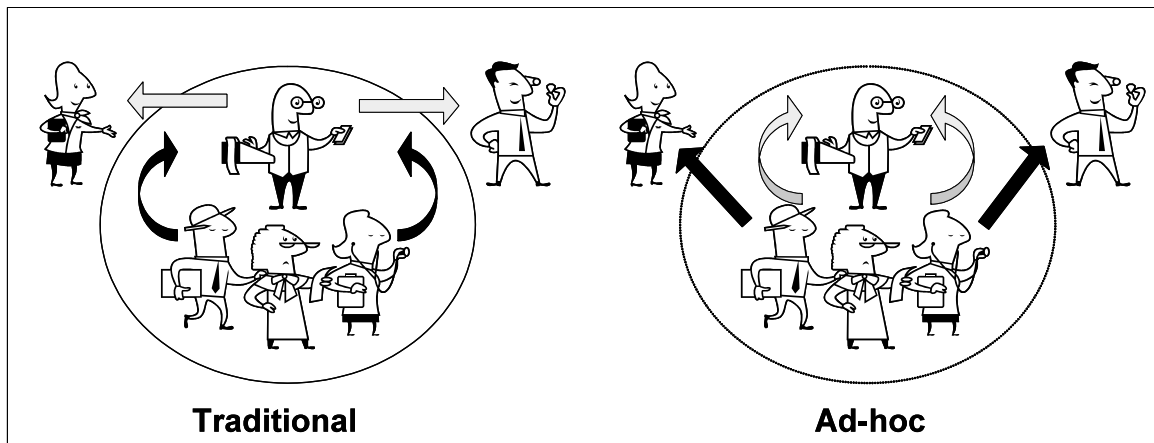


Fig. 5 – Same team, different authority

This confusion in priorities is identified by Tom Peters (op cit). However, he offers little assistance to the Ad-hoc team manager in resolving the inherent conflict in his own statement:

*Loyalty is alive. But it is loyalty to your colleagues, your team, your project, your customers - and yourself.*

As shown in Figure 6, most Ad-hoc team members face an almost impossible model of layers of conflicting priorities and loyalty. Indeed in most Ad-hoc teams we have worked with, the loyalty of most team members is not to the project manager but to their "competency" manager or group. That is, business analysts are borrowed from a Business Analyst group who have created their own culture and practices. The career, skills, education and support of a Business Analyst is the role of the Competency Manager *not* the project manager.

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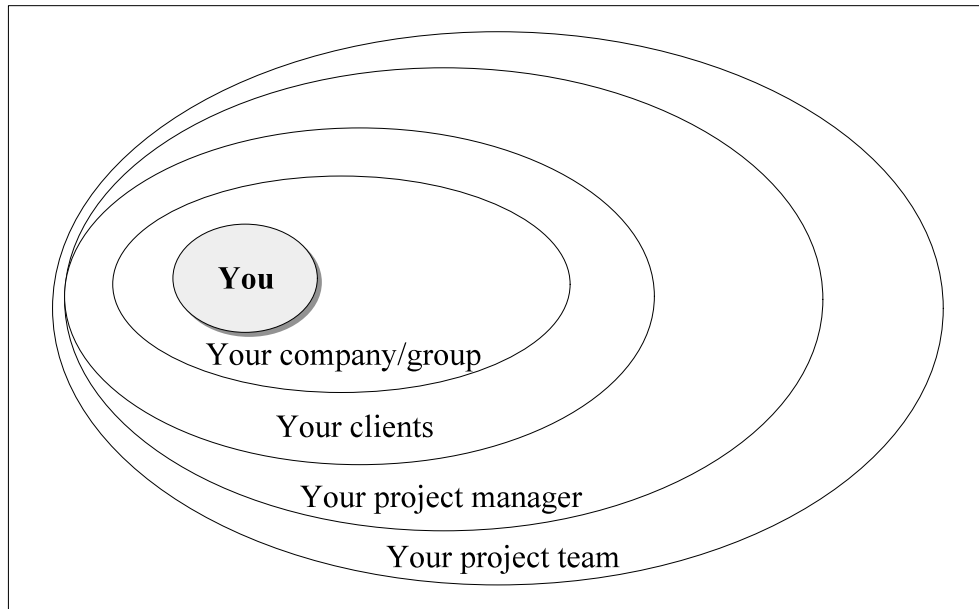


Fig. 6 - An Ad-hoc world of real conflict

As we'll discuss later, without a clear contract or agreement for how disputes are identified and resolved, members of Ad-hoc teams will often be placed in the invidious position of having to resolve conflicting obligations and loyalties by themselves.

### *Loss of control*

Many leaders of Ad-hoc teams have stated how much more difficult it is for the leader to influence the behavior of their "Ad-hoc" team members. As put to us by one frustrated project manager:

*"It would be so much easier if they reported to me. I cannot depend of them as other people can change their world without consulting me first."*

While traditional team structures included models such as the Matrix team model<sup>14</sup> where team members had dual reporting structures [to the project manager and to the technical or discipline management], the Ad-hoc team has much more complex control issues.

In a typical scenario, a Ad-hoc team member is employed by a consulting company but reports, in an organizational sense, to a project manager employed by another company – the client organization of the consulting company. In most consulting companies, loyalty to the consulting company and strict adherence to the consulting company's culture, attitude and business drivers is not only demanded but it is a key determinant of the individual's career path<sup>15</sup>. In many cases, this will result in divided loyalties and loss of

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<sup>14</sup> The inability of organizations to resolve the conflict between two management reporting systems has been cited as one of the major causes of the failure of Matrix team structures.

<sup>15</sup> It a bizarre turn-around, we believe that many of the major consulting organizations we have observed are more bureaucratic and hierarchical than their client companies. This is supported by

## The future of project teams

control, from the project manager's perspective. For example, a consulting company's need to secure an increasing income stream can lead it to replace more competent people (working in a project for an existing client) with new, less competent people; thus freeing up their better people for a more lucrative client contract.

### *Adhocery*

We sort of invented this word but, it appears to represent the dynamic of so many Ad-hoc teams that we have observed.

In effect, not only is the commitment of Ad-hoc team members an "arms length" one, the time allocated and the effort expended by Ad-hoc team members is generally part-time and extremely difficult to control and predict – in other words, it is ad-hoc.

Many project managers and team leaders have been caught when assumptions that they have made in good faith regarding the availability of their Ad-hoc team members are proved wrong. At best, the result is a degradation of the quality of the work of the Ad-hoc team member as they have less time available than was planned. At worst, the work is done in small bits over a longer period of time than planned.

This adhocery results in what we have now termed "the death of a project through 1,000 small cuts" (we'll return to this later in this Report).

### *Confusion of responsibility*

Perhaps the biggest failing of Ad-hoc teams is the question of "who is responsible for *what?*".

In a typical project today, the Project Manager may have no direct reports (in a line sense) and everyone on his or her team is "borrowed" from competency leaders, consultant/contract companies, other organization managers or resource managers. There is a "dotted" line to the PM and a solid line to the competency lead, consultancy account manager or organization manager.

Let's assume that the project is dependent on a group of contractors who work for a company (Company X) that has a long term out-source relationship with the company for which the project manager works (Company Y). Under the legal and financial arrangements, Company X has all the technical skills required for delivery of the product. The project manager gives complete and accurate requirements to the contractors who work for Company X. In addition, the project manager develops a series of exit/quality assurance criteria to evaluate whether the work done by Company X people is correct. The delivered work is incorrect and, as a result, the project is now delayed by 3 months.

"Who is responsible for the time blowout?" The short answer from many executives and sponsors is "the project manager". However, given that the project manager has no direct control/authority over Company X people (they

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a consult we undertook with a high profile global outsourcing/consulting organization which asked us to help them become more agile and flexible.

## The future of project teams

work for Company X not Company Y), it is clear that Company X management should be held responsible for the delay.

This situation is not unique to business and IT projects. Professor Graham Lynch, in *Managing Construction Projects* (Blakewell Publishing, 2009), when discussing project manager responsibilities on construction projects states:

*"Many project managers working directly for clients have little more than a monitoring and advisory role and little or no executive responsibility. Thus, one of the main peculiarities of the construction industry compared to other sectors is that those who carry the title "Project Manager" frequently have little or no responsibility for actually realizing the project."*

In his book, he focuses on the challenge for most construction project managers when trying to deal with multiple other project managers from the various construction groups required to realize i.e. actually build a large building. We now face the same problem in business and IT projects through the use of Ad-hoc teams.

Other impacts of Ad-hoc teams include loss of team and corporate memory and skills degradation. However, these are more of a corporate concern than a team issue.

### The team of the future – the X-team

This model of team structure should be considered as an inevitable outcome of the pressures mentioned earlier as well as the need for organizations to maximize the productivity of their specialists. It is a "hybrid" model that includes the best elements of Traditional project teams and Ad-hoc teams.

The X-team structure also recognizes the pressures for downsizing or "right-sizing", cost-recovery and flexibility demanded by organizations in the 2000's. It also takes into account the need to create project teams that can build and sustain a long-term strategic change. It also recognizes that some organizations are prepared to invest in their people for the long-term rather than seeing them as Handy stated *"largely inter-changeable .. parts"*

The X-team model is derived from a concept of organizations outlined by Charles Handy (op cit) in his book *The Age of Unreason*. Citing major organization, financial and social discontinuities as a result of the 1980's, Handy argues that organizations should be structured as three non-hierarchical elements. Handy terms this structure the Shamrock organization after the Irish plant with three leaves on each stem. The central element is a small core of full-time organization professionals i.e. the people who *are* the organization. The second element is a group of contract professionals who are used on demand by the central core and the third element is the part-time or flexible workers who provide the administrative and clerical support to the central core on a non-permanent basis.

As shown in Figure 6, the X-team involves three major elements. Each element has its specific role in project development and, depending on that role, can be further partitioned into five sub-elements.

## The future of project teams

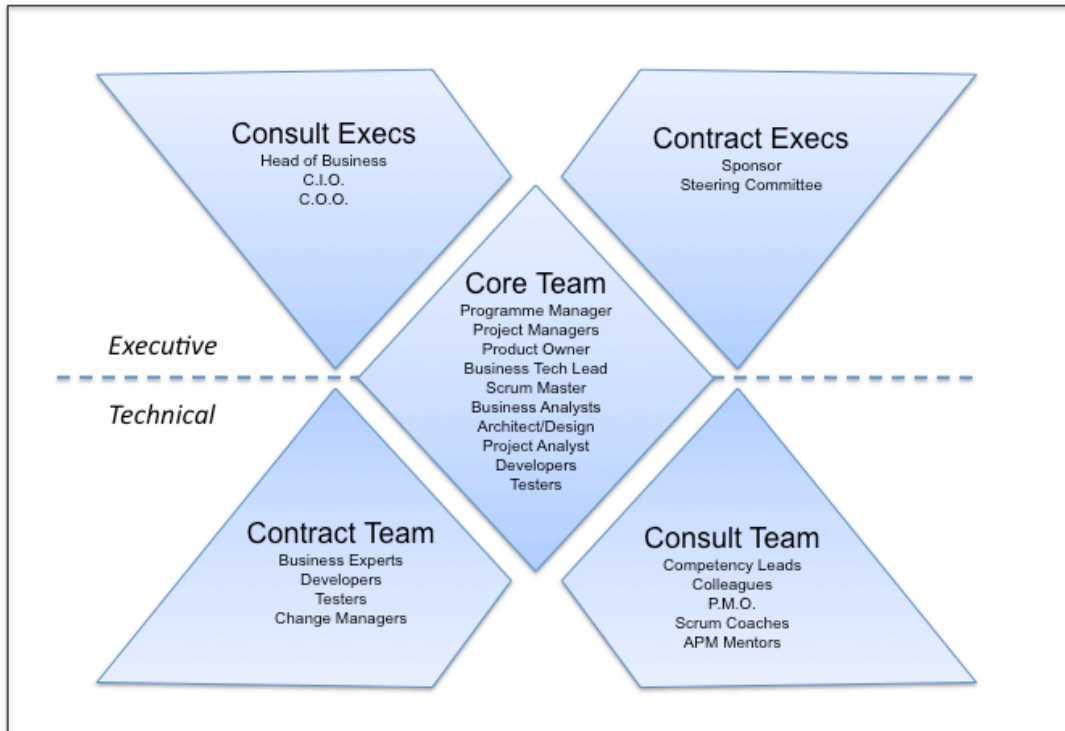


Fig.6 - the X-team structure

The model is based on a number of key assumptions that reflect the issues discussed in the earlier parts of this paper.

The most important assumption is that the project manager<sup>16</sup> is considered as a "contract" manager who is contracted to manage the project by the organization and who has the authority, funding and organizational position to structure and staff the project. As documented by Thomsett (2003), contemporary project management is already moving towards a more Agile and lean model. The second assumption is that the project manager is not necessarily a computing expert. Again, this assumption is already widely implemented in leading organizations. The third assumption in the X-team structure is fundamentally different from prevailing team structures in that only central core is permanent to the project and remains together for the entire project/programme development cycle.

A key element of the X-team structure is the use of contracts and/or consultancy to secure the additional people for the project that are not required on a full-time basis.

Traditional computing project management was based on informal, often word-of-mouth, agreements between the project manager and the numerous stakeholders (providers of service to the project manager) required to develop his or her project. As documented by Thomsett (op cit), Agile project management involves the negotiation of formal contracts between the project manager and the stakeholders. These agreements may be non-legal in the sense that they are service agreements between internal groups or

<sup>16</sup> Project Manager, Programme Manager or Project Director

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alternatively, they are legal contracts between external stakeholders (vendors, contracting companies, system integrators, etc) and the project manager's organization.

The X-team structure simply is an extension of this practice.

### *X-team elements*

There are three major elements in the X-team structure:

1. the project core - a permanent team consisting of the project manager, business experts, system architect and the technical resources required to undertake the majority of the project work. The project core is supplemented by two elements that are engaged on-demand to meet with specific expert requirements or "peaks and troughs" in work-load;
2. the contract group - this is a group of specialists including senior management such as programmers, technical writers, testing experts and so on contracted by the project core usually on short-term contracts to undertake the development effort. These contract people can be either drawn from internal groups or external companies depending on their skills and experience. In either case, formal contracts for service are negotiated which include specific timeframes, performance criteria and termination conditions. It is important to note that the requisite senior management roles such as Steering Committees, Sponsorship and so on are treated as contracts as well; and
3. the consultancy services - this is a group of people required as a part-time, consulting service in generally highly specific areas of expertise. Areas such as data base administration, auditing, finance, quality assurance, Scrum or APM (Agile project management mentors), network and operations support would be typical of these services. In the senior management area, involved business area management, other project managers and Finance/Accounting management would be typical of this element.

As for any contract, violation of the terms of the agreement would be subject to change control procedures and re-negotiation of the project's terms of reference and associated contracts.

### *The Core Team*

As shown in Figure 6, the project core consists of permanent team members. The project manager is the contracted manager of the project for the entire development cycle. The project manager is delegated either absolutely or organizationally enough of the agreed budget for the project to be free to

## The future of project teams

negotiate requisite resources, equipment and so on required for the project. While in most organizations, the formal and absolute delegation of budget is not likely, it is essential that, at least, the project manager has the authority to negotiate and select resources within his or her discretion.

Other roles undertaken by the X-team project manager include planning of the project, stakeholder relationship/engagement, negotiation of resource contracts, quality planning, management of stakeholders, project control and planning and financial management of the project. The project manager would also be responsible for the management of project resources on a day-to-day basis.

The Product Owner/Business Technical Lead represents the project sponsor's area and is the person responsible for the overall product/system requirements, implementation and organization issues such as job impact, procedures and policy impact. The business manager would typically assist the project manager in stakeholder management and, in many cases, would also directly manage the day-to-day financial and administrative arrangements for the project. However, the key role for the business manager is the management of the system's requirements and/or Product Backlog and the quality assurance of the requirements throughout the development cycle. In larger projects, the Business Technical Lead would manage a project communications component involving newsletters, presentations and general project public relations. As mentioned earlier, in smaller projects, the project manager would also undertake the business manager role assisted by the Project Analyst/administrative people.

The business and systems architects are the key technical support to the project manager. This role is not to be confused with the systems manager found in traditional project teams. Whereas a systems manager is the senior computing person and is functionally and organizationally the manager of the systems people, the systems architect does not "own" the computing experts in the X-team - that is the role of the project manager. assisted as required by the systems architect. The primary roles of the business and systems architects are to work with the Product Owner and IT Technical Lead<sup>17</sup> in ensuring that the business requirements are met technically and to ensure that the design of the system is consistent with the organization's strategic, data, functional and technical architectures. Clearly, these roles require a experts who are familiar with the complex issues of integrated business and system architectures rather than the simple administrative role undertaken by most traditional system mangers. The business and system architect, in conjunction with the Product Owner and IT Technical Lead, would also be responsible for detailed technical quality planning, control and assurance.

Developers, testers and other technical people are allocated full-time to the project and are involved in all aspects of project planning and delivery. They are supplemented with additional people from the contract arm as required.

The Project Analyst/administrative support<sup>18</sup> people provide the detailed day-to-day support required by the project manager, business manager and system

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<sup>17</sup> Scrum Master

<sup>18</sup> Project Controllers

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architect. While most organizations have mistakenly eliminated the clerical support roles in traditional project teams in an effort to reduce costs and staffing, there is increasing evidence, even in traditional project teams, that a large percentage of project work is fundamentally clerical in nature and does not require tertiary-level professional education. In the X-team, the role of administrative support is vital as there is considerable paper work and administrative effort required in the management of the numerous contracts, costing and physical work environment issues involved in the structure. In addition, administrative support people would maintain project schedules, undertake preparation of project reports, organize the project meetings and other project activities.

### *The contract group*

The contract group are the "legs and arms" of the project. They are the numerous essential stakeholder groups required by the project manager to successfully develop the project within the terms of his or her contract.

There are two sub-elements in this group. The project or technical sub-element includes the experts required to undertake the analysis, design, building and implementation of the project. Typical experts contracted by the project manager would be business analysts, system designers, internal communications, human resource experts, data analysts, data designers (experts in physical data-base design), human-interface experts, technical writers or documentation experts, programmers, testing experts and so on. These people work with the project only for the period required by the nature of the project.

Depending on the organization, these people would be from internal groups or "pools" or external contracting organizations. The key issue here is that the project manager has the choice to negotiate requisite skills from wherever he or she can obtain them. As mentioned earlier, all contract people would be involved under formal contracts.

The second sub-element of the contract group is the senior management and executives who are essential to the success of the project. In most organizations, this sub-element would include the Project Sponsor, the various members of the Project Steering Committee, Strategy and project managers from inter-related projects.

While the involvement of these people will not be as "full-time" as the technical members of the contract group, they are vital to the project's success and, as such, should be involved in formal two-way contracts with the project manager in terms of their roles, responsibilities and availability.

### *The consultancy services*

The consultancy services provide a part-time service to the project manager. In most organizations, these groups have already been formed and are providing this service to traditional project teams. The key distinction between these people and the contract group people is the nature of their services and the duration.

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Consultancy services are generally provided on a short-term and on-going basis as distinct from the longer term and one-off services provided by contract group people. Contracts negotiated with contract people would specify a specific time period and cost for a specific phase of the development life cycle whereas contracts with consultancy services would be on a time-and-material basis specifying a specific series of part-time consults over the development life-cycle.

Again, there are two sub-elements. The project or technical sub-element typically would typically consist of Information Resource experts, technical architects, network and operations consultants, internal audit, quality assurance, project estimators, Scrum Master and Agile project management mentors and relevant experts from the business areas such as Policy, Finance, Internal Communications, Marketing and so on. The senior management sub-element would include management from related or impacted business areas (as distinct from the Sponsor business area), Finance and Accounting management, Human Resource management, peer group project managers and management of the broader programme area.

The nature of the X-team and, in particular, the use of contracts and highly disciplined project management would avoid the problems of confusion and split-loyalties associated with the earlier attempts of functional/specialist management associated with the matrix organization model.

An additional organizational impact of the X-team structure is the need for highly trained project managers. As most organizations are beginning to realize that the process of computer project management is different from the process of operational management and technical management, the development of a pool of expert information system project managers drawn from any organization area and developed through an intensive education programme is inevitable irrespective of the team structure.

Perhaps the most difficult challenge is changing the level of involvement and focus for senior executives. Earlier in this paper, we overviewed the existence of two types of work (and associated teams) within all organizations. The first is process work or business as usual (BAU). BAU is about the business of the organization. Its daily processes and procedures and about maintaining the status quo. The second is project work or, in a broader sense, change or business as unusual. In fact, any activity that changes the status quo is a project. In the past, most executives were trained and socialized to focus on BAU and, as we discussed earlier, the majority of executives had emerged from the BAU areas.

### **Newsflash! Executives have brains**

One of the most dysfunctional impacts of traditional hierarchies is the potential loss of the years of experience that most executives have gained during their career. We have worked in organizations where the most senior executive team had over 300 years of combined experience. It is critical that project manager gain access to this knowledge, experience and acumen.

Given the unprecedented challenges facing all organizations in 2009 and beyond, we have been arguing for a number of years that the focus of senior executives must shift increasingly towards the project space. Indeed, we

## The future of project teams

believe that an organizations capability to innovate and implement change is the key determinant of its long-term sustainability.

In a series of studies in our client base (which comprises major organizations in both the private and public sectors), we determined that the most common model was the executives spent less than 5% of their time involved in the issues of project governance although the organization investment in strategic IT and business projects was over 30% of their total operating budget.

Programme and project management will emerge as one of the central skills in contemporary organizations and the X-team will require executives to become closer to projects and more involved in the detail of project management (see *Agile Sponsor Handbook*, Thomsett, 2009).

### Different team typologies

The structure of team reflects its shared micro-culture and, to a lesser extent, the broader culture of the organization/s to which the team belongs. The team typologies developed by Larry Constantine (1990, 1995) identified four basic team structures:

- ◆ Random - there is no effective team structure. Each team members works alone and the organization provides basic administrative and communication support. Communication is sporadic and unplanned. This team structure is common in legal firms, accountancy firms and volunteer groups;
- ◆ Synchronous - team members are professionals who understand their role in the overall team model. They work with little direction from each other taking specific tasks and delivering the required outputs. There is little communication between team members. This team structure is common in highly-skilled consultancy companies;
- ◆ Structured - This is probably the most common form of structure process team. It is hierarchical with clear distinction between leaders and workers. It has clear rules and performance criteria. The communication patterns are typically upwards and downwards. It is common in most organizations; and
- ◆ Open - This is the team in which I worked in the 70's. Each team member has both leadership and delivery roles. The structure is flat with shifting leadership and open communication between all members. It is collaborative and supportive of team members. This team structure is common

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in highly innovative organizations<sup>19</sup>.

As shown in Figure 7, we can integrate Constantine's work with the four organization cultures proposed by Rob Goffee and Gareth Jones (op cit) and suggest that the majority of Ad-hoc teams will have either Random/Fragmented structure or a Synchronous/Networked structure. A Random/Fragmented project team is clearly a sub-optimal situation. As discussed in Appendix B – A quick guide to building a team micro-culture, the project manager, the Sponsor and the team members must implement strategies to build a sense of shared values and behaviors. In addition, formal communication lines and project management practices must be implemented to focus the team on performing and delivering.

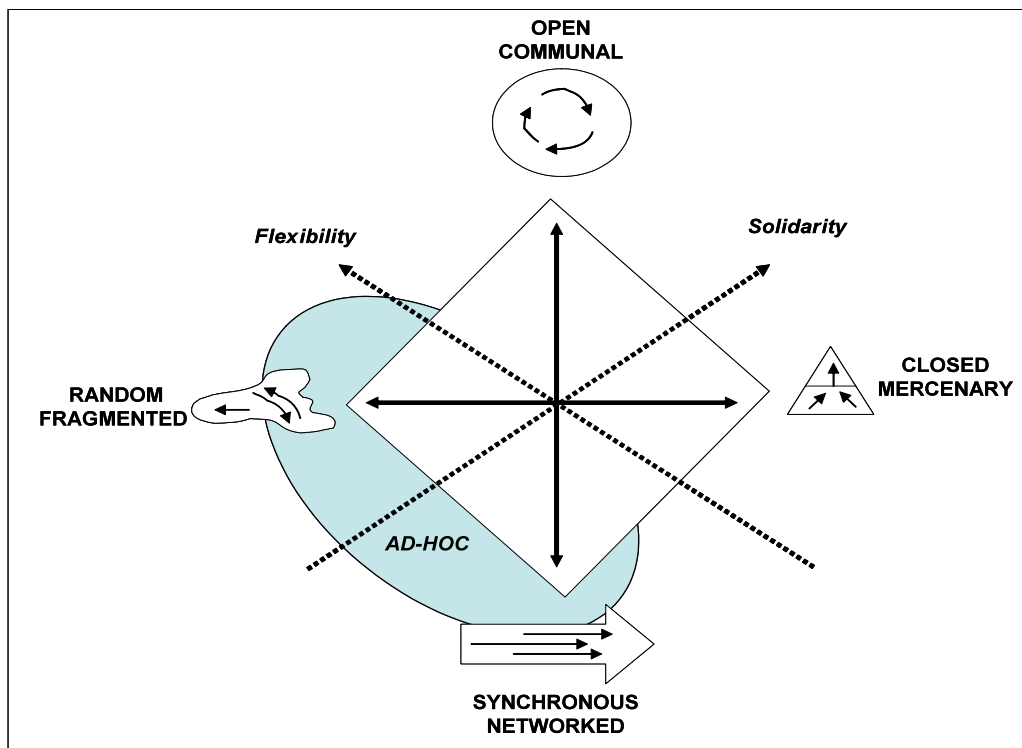


Fig. 7 – Team structure and team culture

### Is one team better?

While some of us may miss the traditional team, the Ad-hoc team is here to stay. In fact, as staff turnover and staff shortage levels are now approaching those previously experienced in the late 1980's; coupled with the growth in global outsourcing; the incidence of Ad-hoc teams will increase. Indeed, our anecdotal evidence shows that, within most IT groups, Ad-hoc teams are now the vast majority of teams.

In our opinion, a well-formed X-team will outperform an Ad-hoc team and will be a more pleasant and fun team to work with than an Ad-hoc team. Further, while advocates of the Virtual team world cite advantages such as 24/7 processing and, in the case of outsourcing, lower costs, there is overwhelming evidence from our research and from companies such as W.L. Gore &

<sup>19</sup> Larry and I developed an extended version of the Open Team called a Structured Open Team which had specific leadership roles similar to the Belbin model.

## The future of project teams

Associates (the makers of Gore-Tex), which *Fast Company* (2004) identified as one of the most consistently innovative companies, that co-location, more “face time” and shared values are critical building blocks for creativity and innovation.

These are critical for effective implementation of Agile business approaches.

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# The future of project teams

## Appendix A

### **A Code of Conduct – Project Teams**

I will provide full disclosure regarding my project and work to my project manager, other team members and service providers.

I have a right to say “No” with reasonable justification to demands for instant estimates and other commitments that will impact other people.

I have a right to ask for “Help” and expect support when this happens.

I will never give estimates or other commitments to my project’s clients, other team members and professionals or my project manager that I cannot honestly support and achieve.

I will not estimate for or make other commitments for other professionals in my team and my project manager without prior and full consultation with them.

I respect the right of others to re-negotiate their commitment and other service expectations.

The other professionals in my team must respect my right to re-negotiate costs, schedules, resources and quality upon their changing of their commitment.

I will never place my personal or professional interests above those of my project manager, team and organization without informing them.

I will record my work and relevant measures honestly.

I will endeavor to treat others as professionals even if they don’t treat me the same way.

I will endeavor to provide a role model for new members of the team and to discuss openly with them the Code of Conduct.

I will confront any breach of this Code of Conduct by other professionals in my team.

# The future of project teams

## Appendix B – A quick guide to building a team micro-culture

It has long been accepted that effective teams undergo a series of stages of development. We have modified the standard four stage model to include two new stages that reflect the new world of Ad-hoc teams. At each stage of the team development, there are a different but related set of concerns you need to be aware of and focus on.

### *Forming*

This is where the initial team members are decided. Almost all experts in both teams and Virtual teams agree that getting all the team members together (face-to-face) is an essential starting point. Given that the project manager may never have worked with his or her team members before the initial team sessions are vital.

The trick here is ensure that both the project and the people are “in play” during the initial meetings. While the project management process should take care of the project’s vision, scope and objectives, the people side needs also to be discussed openly in the initial team meetings.

Some low risk exercises we have used in the initial meetings of an X-team to bring the people dimension into play include:

- ◆ Letting team members discuss their favorite movies or TV shows (seriously this really does get people talking and appreciating differences);
- ◆ Developing a team flag – a picture of what the team “stands for”;
- ◆ Coming up with a “secret” team name that only team members know;
- ◆ If possible, play some team games together. These can be physical games or the sort of team games based around building towers of paper and so on; and
- ◆ Depending upon the mix of cultures, coming up with “nick-names” for the team members creates a sense of bonding and relationship.

### *Norming*

This is the stage where you can begin to focus on the hard glue that will bind the X-team members together. In this stage, which typically should follow immediately after the Forming session, you and the members of the Ad-hoc team must develop its formal rules of behavior, its communication patterns and formal team roles.

We have used combinations of the exercises below to assist in this stage:

- ◆ If the organization or organizations have stated vision, mission and/or value statements, discuss these with the team members. Do they agree or disagree with the corporate view? Are they relevant to the team?
- ◆ Discuss the Code of Conduct in Appendix A. Is that relevant to the team? What additional rules could be applied?

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- ◆ Discuss examples both positive and negative of preferred behaviors;
- ◆ Clarify administrative rules such as start and end times for the work day, dress codes, acceptable office personalization and so on;
- ◆ Design communication patterns and protocols e.g. how to flag critical messages, etc;
- ◆ Agree on symbols and team rituals e.g. pizza Fridays and so on; and
- ◆ Agree on the mechanism of reward and punishment and the escalation and dispute resolution process to be followed.

### *Storming*

This is the stage, which typically re-occurs throughout the life of a team. It is to be expected that conflict and the confusion of loyalties discussed throughout this Paper will emerge. While some of these disruptions can and should be handled on a one-to-one basis, it is preferable for all the Ad-hoc team members to be included when conflict arises.

Some key points here include:

- ◆ Attempt to resolve the dispute using your agreed Code of Conduct and dispute resolution;
- ◆ Inform all team members of the dispute and how it was resolved;
- ◆ Recognize the inherent conflict of interest that exists within team members and try not to make it personal.

### *Performing*

This is the stage where the X- team gets "on with it". The key here is to maintain a constant communication and peer-review process. The communication should be focused on the Business Case and performance against agreed success criteria for the project. However, a constant reminder of the agreed team micro-culture is also required in all communications.

Some tips for this stage include:

- ◆ Celebrate often and publicly. In traditional teams, the "soft glue" was often sufficient to reward people. In an X- team, you really have to make an effort to make team members feel appreciated and valued (especially those from the contract arm). If you don't, remember they have another "home" to go to;
- ◆ You cannot over-communicate in an X-team. Encourage all communication and every communication pattern between team members; and
- ◆ Communicate often with the bosses of your Ad-hoc team members. Let them know how well their person is going in the team (or not). By

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keeping the “home boss” in the loop you can minimize the un-expected reallocation of one of your team members.

### *Reforming*

This is inevitable in the X-team world. Given the intense pressure of Agile and long programmes, team members will move on. Consultants and contractors will find other clients and so on. When new members arrive (and others leave, see next point), you should re-convene the team in a “time-out”, review the micro-team culture points developed in the initial Forming/Norming sessions and allow the new members to add their input into the process.

### *Mourning*

It never ceases to amaze us how badly most organizations and teams deal with this stage of a team’s life. If the team has been together for greater than, say 3 months (the period of time depends upon the intensity of the project), then people will have bonded in some form. As a team member leaves or the project is finished and the team is being disbanded, there is often a sense of sadness, sometimes betrayal and loss that many team members will feel. The following tips can help minimize this:

- ◆ Have a going away party;
- ◆ Conduct a formal Post-Implementation Review and ensure that the X-team members are fully included in the PIR process. A PIR is the formal ending of a project but the PIR Report is like a history for the team; and

If appropriate, agree to keep the departing team member in the on-going project communications and reporting.

### **Time-outs**

It is critical when building teams for a long term implementation of a Strategic Plan and related programmes, that there a scheduled “time-outs” every three months or so. These time-outs have a number of purposes:

1. To re-bond and re-energize team members;
2. To welcome new team members to the team;
3. To celebrate achievements; and
4. To build a programme “living history” of shared stories and experience.

These time-outs should last for a day at least. They are fun and work should be kept to a minimum.