

Project Management Tales – The Expert, But at What?

By Debbie Gallagher



Debbie Gallagher

Each story in this series of Project Management Tales is true, but company names have been changed. Some stories occurred in Canada and other took place in the US or overseas.

Background

Acme Consulting was engaged to implement a work order management and call centre processing software package for a European client. Acme had resources with expertise in work order management, but not in call centre processing software, so they hired a sub-contractor to do the call centre portion of the software implementation.

The client staff made some vague complaints about the sub-contractor, as they thought she didn't adequately document her work or follow through on planned tasks. However, the client was more interested in the work order management system and let the sub-contractor mainly work alone on the call centre system.

The project manager had an uneasy feeling about the sub-contractor. However, the previous complaints had been vague, and the sub-contractor's other references suggested she was an expert. So, when Acme Consulting wanted to propose on an implementation of work order management and call centre processing for another client, Standard Limited, Acme asked the sub-contractor to help with the sales process.

When Acme was chosen to do the work at Standard Limited, the sub-contractor expected she would do all of the work related to the call centre processing module.

Acme Consulting hired the sub-contractor to do some of the call centre module work, but because this was a larger engagement, Acme also assigned another resource to work on the team.

The other resource had industry experience, but he did not have experience with this particular package, so was assigned a more junior role on the team.

The Situation

Before the implementation even began at Standard, the sub-contractor complained to the project manager that she was not being assigned enough hours, as the junior resource from Acme was also working on the project.

In addition, the sub-contractor felt her performance would be monitored by the Acme resource.

The sub-contractor did not want to use Acme's implementation methodology, but the project manager, the Acme resource and the client insisted on following it.

Differences in approach and work habits, such as attention to detail and quality of documentation, caused additional friction between the sub-contractor and the junior resource.

Action Taken

The project manager met with the Acme resource and the sub-contractor together to clarify roles and responsibilities. The sub-contractor agreed to follow Acme Consulting's methodology and both agreed to work together on ensuring the implementation was delivered according to the client's requirements.

However, the client liked the more junior person's work habits and approach, and over time, the junior resource informally led the team.

In addition, although the sub-contractor appeared to be knowledgeable about the call centre software, the client and the junior resource did a lot of detailed analysis and didn't always need the sub-contractor's expertise.

There were occasions when the client felt the sub-contractor had given incorrect information about how the product worked, so the junior resource corrected the problems and did not charge the client for the time spent in re-work. Although the client was not overcharged, she felt that the sub-contractor should have been more knowledgeable so the work would not have to be re-done.

During the implementation project, Standard Limited required some custom programming work to be done, and Acme Consulting had no resources of the right type available to do the work. So, when the sub-contractor proposed using her own staff to do the custom programming, Acme's project manager did not object.

As the project continued, it became evident that the sub-contractor had continued to provide additional staff for more custom programming projects at Standard Limited.

The sub-contractor's custom work became a source of confusion on the project. Who was responsible for delivery? Did Acme Consulting guarantee the work of the sub-contractor's staff?



Epilogue

At the end of the project, Standard was generally pleased with the work done by Acme Consulting resources. However, they were very unhappy with the work done by the sub-contractor. In addition, when there were problems with the custom work, Standard called the Acme Consulting project manager, who had to refer them back to the sub-contractor.

Conclusions

Although the project manager had a queasy feeling about the complaints regarding the sub-contractor at the previous client, he ignored them because there were other references. That queasy feeling was an intuitive risk assessment and should not have been ignored. The project manager could have inquired further about the vague complaints at the previous client, and made a more informed decision about whether or not to use the sub-contractor at Standard Limited.

The sub-contractor assumed that Acme would use her for all of the implementation work because, had no specific agreement had been made. Acme Consulting could have used the sub-contractor during the sales process and paid her for her time instead of agreeing to put her on the implementation project. Alternatively, a different resource could have been used, perhaps a different sub-contractor, or an Acme Consulting resource from another city or country.

Once Acme Consulting did decide to use the sub-contractor, she should have been managed more rigorously from the start. For example, a written agreement should have been drafted, covering the amount of work that was awarded to her, the methodology to be used, the quality of work expected, and how it would be measured. The agreement should have also specified how to terminate the sub-contractor in the event that the work delivered did not meet the standard required by the client.

The sub-contractor should have been specifically prohibited from presenting her own staff to work on other projects at the same client. The confusion caused by this practice led to a lack of satisfaction with Acme Consulting that was not directly attributable to Standard's own work.

In retrospect, the project manager said he made too many allowances for the sub-contractor, and should not have "fluffed off" his vague feelings of discontent with the sub-contractor's work at the previous client. 

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[Debbie's previous "Project Management Tales" are available on her personal web site: www.gallaghers.ca/debbie.]

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