Team Management (OCM) White Paper

Applies to:

SAP Organizational Change Management (OCM)

Summary

Building and effectively managing a cohesive, motivated project team is key to the success of any project. The more complex the project the more critical effectively building and nurturing the team becomes in achieving "success". This white paper discussed techniques for effectively building, maintaining, and disbanding project teams.

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Introduction

The main goal of the implementation project is to deliver the SAP solution for the organization. This is best achieved by:

- Bringing together a team composed of differing resources (that is business staff, internal technical staff, external consultants, and so on), and requiring that they perform at the highest levels immediately or in a very short period of time

- Maintaining the motivation and direction of the team over the course of the implementation

- Ensuring that the team is disbanded and the skills necessary to ensure a maximum benefit from the investment are not lost to the company after going live

Establishing the Team

Establishing the team requires planning and impact analysis so that potential members can understand the job (and its implications) that they are required to perform, be trained adequately in its skill requirements and a mechanism set up for monitoring effectiveness. On projects to implement SAP solutions, internal staff are taken out of their normal role, often to the degree that they are replaced in their previous roles. In some cases, this might even include a geographic move. In other cases, they may still be expected to carry on with their previous tasks in the same location while also contributing to the project. In all cases, there is a group of employees and consultants who are suddenly expected to work together as a team. This can be particularly challenging as team members can have very different backgrounds and knowledge. In many cases, they will also have different mannerisms, working habits and interests. These factors can all contribute to potential conflicts at work and impact the effectiveness and efficiency of the project.

Typically there are two main organizational change management (OCM) activities that are associated with establishing the project team:

- Team building

- Transition support for the project team

Team Building is a generic term. It is meant here to refer to workshops or offsite meetings for the entire project team and other teams, aimed at reviewing project procedures, goals and activities and building or improving informal and formal channels of working together towards a common goal. A second purpose for team building is the celebration of activities. Celebration communicates a clear message to the team and the organization, and its value should not be underestimated. In the ValueSAP methodology, team building is listed as part of every phase. This task is recommended based on typical implementation project risks associated with people not working together as well as they could. Under no circumstances should team building occur without a clear purpose and communication thereof.

The need for OCM intervention on project team transition management depends on how well it has been managed by the project management and the organization. Transition management goes beyond informing the team members of their new role. It also involves assisting them with their move and managing their concerns about the change in their role. These can be issues like relocation or leaving the social environment of other likeminded employees. The difficulties of changing from the previous role and accepting the new role can be addressed in discussion groups during the first set of team building activities. In many cases, the people who raise concerns also have suggestions how these concerns can be addressed. All concerns and recommended solutions should be recorded on the OCM plan. Transition concerns may need addressing prior to finalizing the first OCM plan. In this case project management should be made aware and the issues should be recorded on the business issues list and managed by project management with support from local HR management.

Motivating and Maintaining the Team

As the project progresses, the initial energy levels often start to decline reflecting the fact that the project team is now faced with a significant amount of work to be achieved usually against difficult deadlines. For many internal staff not accustomed to operating in a project environment, this can represent a significant culture change and needs to be managed appropriately. In addition, conflicts can and will arise due to personality clashes and to differences in opinion regarding the best approach. A third factor is the influence of the external consultants on the internal staff. The knowledge acquired on the SAP project, exposure to consultants and the prospect perhaps of a better income or a more exciting career can invite valuable resources to leave the project. This of course introduces another significant risk. An alternative manifestation of this is where staff feels that, due to their newly acquired skills, they have grown out of their old jobs.

As well as maintaining the team building effort described above, the OCM team can provide support in three key areas:

- Retention planning – recognizing that knowledgeable business staff seconded to the project are gaining additional skills. The quality and longevity of the resources selected to participate in the SAP implementation program have also been found to have a direct impact on the success of the project. Projects that develop and communicate an effective retention plan can reduce turnover and thereby retain the valuable knowledge base of the program team members. It is recommended that a retention plan be put in place to reduce this risk of a high project turnover. This retention plan may involve an aspect of reward but should take into account other factors such as recognition, career planning etc. It should preferably be done in consultation with the appropriate representative of the project member's functional management and local HR management.

- Skills development – the project will require the development of new skills. Some of these will be technical e.g. configuration, ABAP Programming, while others may be softer for example providing feedback, managing meetings, conflict resolution, consulting skills. The OCM team may need to provide the relevant sessions to achieve this development.

- Skills transfer – The external consultants bring with them a set of skills that must be transferred to the company in order to allow for ongoing support once the project is over and the consultants have left. This is a critical element of the process if a Customer Competence Center is to be established. In return the business resources bring with them critical business process knowledge. The skills transfer must be a controlled process which identifies the skills to be transferred, the responsibilities of the transferor and the transferee and how the process will be monitored.

Disbanding the Team

As the project comes to an end, the project team will need to be disbanded. This can happen in a managed way or not. If the latter occurs the team members will start thinking about their future careers and may not contribute to the project goal as they would otherwise. This could introduce a significant risk, especially at such a critical point in the project life cycle. By having a managed transition off the project, this risk is reduced. If the transition planning and skills transfer processes described above have been carried out effectively the Transition program should be easier. The change management team is responsible for ensuring that the transition process is managed.

Summary

A large part of team management is the responsibility of the program office and the team leads. In most cases these individuals benefit from the advice, tools and techniques, the OCM team can provide. Some of the help the OCM team can provide is:

Organizational Development

- Assisting with the organization of the project

- Facilitation of the Kick Off Meeting and other formal team events

- Providing guidance on Managing Meetings

- Conveying Feedback and Consultancy Skills

- Providing the assistance for Conflict Management

- Management of the Project's Internal Communications activities

- Producing and disseminating the following documents:

    o Project Standards

    o Reporting requirements

    o Project Organization

    o Project progress

    o Stakeholder Communications

    o Briefing Notes

    o Sponsors' Scripts

Human Resources Management

- Recruiting staff to the project

- Ensuring an effective Transition Management (on and off the project)

- Creating and executing the Retention Strategy for project staff

- Managing the skills transfer process

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