

A DIFFERENT DRUMMER

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How to Interview the Project Sponsor

The ugliest words in project management can occur when the project is over: "We can't use that. It's not what we need."

As the saying goes, "Projects don't fail at the end. They fail at the beginning." That's why it's important to get the venture off to a solid start by interviewing the project sponsor, the individual who will ultimately declare victory (or failure). Never, ever accept someone else's interpretation of what the sponsor is looking for. To be perfectly blunt, if you don't get it from the horse's mouth, you'll likely wind up at the other end.

And to take it a step further, the chances are very high that the sponsor *doesn't even know* what he or she *really wants*, even when they think they do. This is typical on eXtreme projects—those that feature high speed, high change and high unpredictability—where the definition of success and what is wanted and needed will evolve throughout most of the project's life cycle, driven by internal and external change.

And even though the eXtreme project deliverable will likely look much different at the end than it did at the beginning, it's the sponsor that sets the base line and is the one with whom the project manager (the equivalent of the project's CEO) needs to establish a rapport. Could you imagine the Chairman and the CEO of a company not communicating regularly?

How To Conduct Your Initial Meeting with the Sponsor

In preparing for first meeting with your sponsor, recognize that some sponsors will have a very concrete vision of the project and will specify exactly what they want. These are the most dangerous sponsors: They are so clear and emphatic that you may even avoid questioning why the specified project deliverable was even chosen in the first place to be the solution.

In other cases, depending upon the sponsor's personality type and thinking style, their so-called vision may be very soft and difficult to get your arms around. Such sponsors may have a vision so vague that it is more akin to a hallucination.

The questions that follow are designed to create the clearest possible picture of the Sponsor's vision of the project and your role in its success. The questions are organized around these topics:

- The business objective, project deliverable and the expected business benefit
- The project context, including political considerations
- Who the project intended to impact

- Schedule and budget expectations
- Tradeoffs that will have to be made

As part of the Sponsor meeting, you will also want to:

- Gain an understanding of your working relationship
- Set expectations for next steps

By asking the questions that I will shortly outline, you are not only demonstrating your business savvy, but also providing a valuable service to the sponsor and other stakeholders later on.

You don't need to be anal retentive about this and ask every question, nor do so in the order given. The discussion is likely to jump back and forth. You can sort it out later. So let the discussion flow like a river, but guide it so that you wind up with an answer in each category. Asking these questions puts to work the eXtreme project management Shared Values of Client Collaboration, Clarity of Purpose and Results Orientation as well as providing Early Value by helping the sponsor bring her vision closer to reality. The information you gather here literally means that the sponsor's vision is *in formation*: beginning to manifest in physical form.

A good way to start the meeting is to simply jump into the water and get the conversation moving. You can simply say, "Tell me about the project you have in mind."

Avoid Shooting Yourself in the Foot Before The Project Starts

Act as if you were a journalist. You are just gathering information. You are not negotiating. Later, you will have an opportunity to negotiate gaps between what the sponsor wants and what you and the team think it will take to do it. *In soliciting information from the Sponsor, it is critical that do not give the impression that the project being described is achievable - or not -- in the time or budget she gives you.* You will not know this until after the Planning Meeting (which takes place in the Speculate Cycle) when you answer the Business Question # 2: What will it take to get it? *Avoid giving off-the-cuff estimates.*

Here are the key questions. You'll want to adapt these questions to your particular project.

Business Objective

- What opportunity are we going after?
- What's the business need that this project is intended to address?
- What is it that we are fixing, trying to improve or solve?

Project Deliverable: Quality and Scope

These questions delve into the product or service that is to be produced:

"If we had it in place right now (the process, the system, the product, the new service) ...

- What would you see as its main functions and features?
- Is this intended to be a stopgap measure: We'll do it once, and if we replace it, will we start all over from scratch? Or, are we trying to do something that we will attempt to fix and to upgrade over time?
- What would be the absolute bare minimum, do or die functions?
- What would it physically look like to you?

Context

These questions elicit information about the business climate surrounding the project:

- How does this project fit in with the organization's overall business strategy?
- Who's driving this project from above?
- Who will you be going to for approvals and funding?
- What's driving us to do this now? What if we did nothing? Waited until next year?
- How does this fit into the overall priority of projects?
- If we have to let another project slip, what might that be?

Stakeholders

These questions relate to the politics of the project. Here you want to find out who this project is intended to impact, for better or for worse. Those impacted can be either internal or external to your organization.

- For whose benefit is the project being undertaken?
- What customer group or department is the project intended to impact?
- Who is likely to feel threatened by this project or have strong opinions against it?
- Who do we need to talk to that has to be happy with the results?
- Who are the strong supporters of this project?

Business Outcome

These questions are aimed at identifying the valued-added dollar and cents benefits that are being sought as a result of having produced the project deliverable.

Assuming we had completed the project and it were now up and running ...

- What is the most important payoff you are looking to achieve? Increased revenue? Better customer service? Greater market share? Decreased cost of doing business? Short-term profits?
- How would you quantify the dollar payoff are you targeting? ROI? Reduced cost?
- What will you want to see to know that the business benefits have been achieved?
- Under what conditions would we shut down the project?

Timing

- What's the time frame or deadline you have in mind?
- What's driving the deadline?
- What latitude is there?

Resources & Budget

- What would you expect to spend on this project?
- Whose budget is this coming out of?
- Who will I talk to get staff for the project?

Tradeoffs

When tradeoffs have to be made, which one of the drivers for this project must be achieved? That is, it cannot be sacrificed?

- ROI, Timeline, Budget, Functions and features, Quality, Customer/Stakeholder satisfaction, Team satisfaction?
- What is the second most important driver?

Working Relationship

- How do you see your role with respect to decision-making? Funding? Staffing? Who else will you look to for this?
- How do you see my role on the project?
- What progress reporting information will you be important to you?

Managing Expectations

This is the time to ensure that the sponsor understands what to expect next. Let the sponsor know that:

- You will return with ballpark data in answer to the question, "What will it take to get what you want," namely budget, resources and a risk profile.
- This will be very rough. And you will have better data after the Scoping & Planning Meetings are held with the Crucial Stakeholders along with the team that will be doing the work
- Between now and then, you may be back with a few other questions.

Once you've conducted the Scoping and Planning Meetings, you will be in a better position to further clarify your role and relationship in a way that will serve the best interests of the project. In the meantime, take good notes. For now, you are establishing a base line. It's all going to change anyway.

As the project evolves and decisions will have to be made, it's important for you and the sponsor to agree on a protocol for on-going communication throughout the project. The rule of thumb on eXtreme projects is that the sponsor has to be available to make decisions and resolve issues (that are outside the jurisdiction of the project manager)

within two hours.

eXtremely yours,

Doug

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