When Project Teams Collaborate Visually

The picture says so much more than 1,000 words

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> *"There are any number of tools available to help teams collaborate more effectively and communicate more clearly, so why aren't they in widespread use?"*

It's a tough time to be a project manager.

Projects today are more complex than ever. The pace of change continues to accelerate, companies are under pressure to deliver sustainable customer value in the midst of increasing competition, and public-sector organizations are expected to demonstrate ever improved stewardship over public funds. At the same time, technology continues to redefine what is possible on a regular basis. As the Project Management Institute (PMI) notes "Due to the speed of change and the fierce market competition, every organization, irrespective of industry, is required to adjust much faster today than in the past. To do so, organizations launch projects and expect them to deliver results."[1]

But hang on a minute. Let's go back a step. "Technology continues to redefine what is possible on a regular basis". That's clearly true, but it doesn't seem to apply to project management, especially when it comes to effective and efficient teamwork. The drive to a faster paced, more adaptable project delivery environment hasn't resulted in improvements to the way most project teams work together, and there's really no reason for that. There are any number of tools available to help teams collaborate more effectively and communicate more clearly, so why aren't they in widespread use?

One of the major barriers to effective project collaboration is that the collaboration tools that are made available to most project managers are not designed for projects. In fact, most of them aren't really designed for true collaboration. The desire for standardization in enterprise software results in generic collaboration tools that frequently offer little more than document sharing and basic workflow notifications. This results in a 'one size fits none' approach, leaving the tools largely ignored after practitioners realize they aren't helping.

1   Project Management Institute, "Pulse of the Profession 2018 – Success in Disruptive Times", 2018

THE UNIQUE COLLABORATION CHALLENGE OF PROJECTS
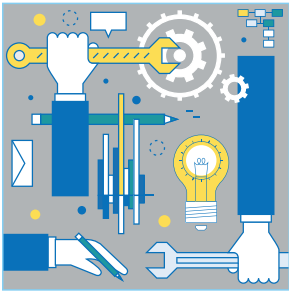
There is undoubtedly a need for effective collaboration tools, and project delivery is one of the most crucial environments for that collaboration. Consider the start of a project. A project manager is given a group of individuals from different areas of the business to form the team. Some of those people may not be happy about being assigned to the project, some likely won't know one another, and some will not really understand what is expected of them.

All of these factors are barriers that must be overcome if the project manager is going to turn a group of individuals into a cohesive team capable of working together to deliver a successful outcome. That process takes time, and the more barriers there are the longer it will take.

The problem is, the project manager doesn't have that time. At the start of the project there are a lot of work items to complete that require input from everyone involved, and they can't wait. Stakeholders need to be identified and analyzed, requirements have to be reviewed and confirmed, a work breakdown structure must be developed, estimates produced, a schedule and plan developed, etc. In Agile project delivery the specific items needed are a little different, but the concept is the same – everyone must immediately work together effectively to develop key foundational project elements.

Traditionally, project managers have taken one of two approaches to these tasks, neither of which is particularly effective.

The first is to ask for individual inputs – having each individual provide content via email or using a shared document. The problems here are obvious – it's easy to disengage, there's no collaboration and no team development.

The second approach is therefore more popular – a group session for each of the key project elements where everyone gets together to build the work breakdown structure (WBS), the risk register, or whatever it might be.

However, there are issues with group sessions as well. Most obviously, not everyone is necessarily in the same location so may have to attend remotely. While modern video conferencing software makes that a more effective option than it was in the past, there simply isn't a way to engage remote groups in a collaboration session that involves sticky notes on a white board. For those in the room, that sticky note approach can make collaboration easier, but it's a far from ideal solution. There aren't many topics that can be adequately broken down into concepts that fit on a three-inch square piece of paper!

What's more, those sticky notes are snapshots in time. They may have relevance and context in the room, but when the project manager takes all of those sticky notes and tries to transcribe them that context will be lost resulting in confusion, misinterpretation and errors.

Sticky-noting also generates a static document, something that can't readily be interacted with by the team going forward. In other words, while the session itself will have gone some way to encourage collaboration and develop the team, it's not sustained.

When it comes to building an effective team quickly there has to be a better way – and there is.

FROM GROUP OF INDIVIDUALS TO COHESIVE TEAM – FAST

One of the reasons people tend to engage with sticky note style approaches is that they provide visual solutions that people can interact with – a bunch of ideas on the wall that can be grouped, arranged, etc. Visual approaches to collaboration are far more effective than simple text for a number of reasons:

- Visual collaboration conveys more information. Even something as simple as grouping ideas together or drawing lines between them creates relationships which in turn adds context to the ideas and provides a more complete understanding.

- Visual collaboration makes information more accessible. Visual cues help to eliminate some of the jargon that can be a barrier to understanding across different roles and business areas. Projects tend to be 'high jargon' environments and anything that can reduce that is a positive – especially when communicating with stakeholders who aren't as intensely engaged with the daily work.

- Visual collaboration is faster and simpler. Trying to explain concepts to people using nothing more than words can be both time consuming and frustrating. Draw them a couple of diagrams to illustrate the point and you can create understanding much more quickly and without all of the additional 'noise' of text only explanations.

- The type of information project teams need to collaborate about is visual in nature. While recent research suggests learning styles are not as clear cut as some believe, there is evidence that a style that suits the material is much more effective. Kelly MacDonald, lead author of a study on learning myths that addresses learning styles notes "Some types of content really lend themselves to visual presentation."[2] In projects plans, relationships, matrices, etc. are all key tools in building a project structure and all require collaboration. And they are all better represented visually.

This is exactly what is needed to create a cohesive project team quickly – more information, in less time, presented in a way that is easier to consume. Let's look at how it works in practice.

Today, tools are available that allow for visual collaboration electronically. At the most basic level they are simply software sticky notes or mind mapping products, although as we'll see, the best solutions are much more than that. So, if a project manager needs to get his or her team together to identify and analyze stakeholders or perform some other early project task they can use these tools to overcome all of the barriers to collaboration.

To start with, these tools can be interacted with by all participants, regardless of where they are physically located. Conference software allows for screen sharing of the project manager's computer that is running the software, while people in the meeting room can see the same information projected on a screen. Immediately we have a common, visual platform that everyone can interact with.

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2   PRI.org, "Consider yourself a 'visual' or 'auditory' learner? Turns out, there's not much science behind learning styles.", Julia Franz, September 17th, 2017

The PM can add to that by using the tool to capture information on all team members. Even if no one knows anyone else, by visually grouping names with titles and departments and displaying it for all to see, there is an immediate representation of the project make up and structure. All individual participants then need to do is identify themselves by name when they speak and everyone can immediately see how they fit in to the team.

When it comes to the meeting content, real time visualization makes collaboration as simple, straightforward and effective as possible. As soon as a single idea is captured it is visible to all. It can be refined and clarified by the group to provide everyone with the same clarity and understanding. As soon as additional ideas are added, the relationships between those ideas are clear to see. If a mistake is made it can be corrected in an instant, and if there is disagreement that cannot immediately be resolved, it can be captured and set aside to revisit later.

As work continues, additional characteristics can be added to each of the ideas, concepts and items that have been identified. There's no need for a rearrangement of fifty sticky notes if you want to add additional details, it's just a couple of clicks. If ideas need breaking out into a number of different concepts, that too is achieved immediately without any loss of the relationship with the parent idea. And at every step of the way the work is being validated by every team member because they are seeing the group's efforts develop in front of their eyes in real time. It doesn't get any better than that when it comes to collaboration and teamwork.

Except it does get better than that.

DO IT ONCE, LEVERAGE IT REPEATEDLY

Best in class visualization and collaboration tools can do much more than simply capture ideas and show them visually. Of course, they immediately eliminate the need to transcribe information because they are already electronic in nature and offer integrations with other office productivity applications. But that's just the start. They are living elements of the project, existing as intuitive and accessible ways to present and manage information at all stages of project delivery. The information from those early collaboration sessions can be used for all of the following scenarios.

Presentation of concepts and ideas to stakeholders

Just as visualization makes it easier for the team to work together developing solutions and ideas, so the same visualization can be used to communicate those ideas.

- Project managers no longer have to spend their time building and updating presentation material for different stakeholder groups, instead using the graphics directly from the collaboration tools.

- Visual collaboration tools allow for real time interaction – reviewing high-level summary information while allowing details to be assessed by drilling down into individual elements.

- Information can be presented in a number of different ways, allowing for presentations to be easily tailored to different stakeholder priorities – which leads to the next scenario.

## *Management of work throughout the project*

Modern software solutions don't just allow teams to draw boxes and connect them with arrows. They support the capture and management of multiple characteristics for each item, providing meaningful ways to interact with concepts throughout the project.

- Time based characteristics allow for the creation of project schedules which can be represented in traditional Gantt formats or other time focused views.

- Add in information about resources and you can see work schedules, resource data provides information on workloads and bandwidth, and task status information provides an indication of progress.

- Beyond the time focused view, status information also supports Kanban board presentations (an increasingly popular way of showing status), allows for the display of overdue or at-risk items and flags issues and risks requiring more attention.

Personal productivity

From a project manager's perspective, the ability to capture so much information related to a project in one place, especially when that place is directly connected to the collaboration activities that is the source of all project work, represents a tremendous time saving.

- The project manager no longer has to update information in multiple different systems or use unreliable spreadsheets to consolidate information from multiple sources. Instead, he or she can focus on high value work – leading the team and resolving problems.

- For team members, being assigned to work items allows them to manage their work more effectively and efficiently. They immediately have a visual representation of how their work fits into the overall project, allowing them to understand dependencies and related work.

- All users can also create personalized to-do lists and work schedules using the same visual approach, giving them much more control over their work than with traditional project management software.
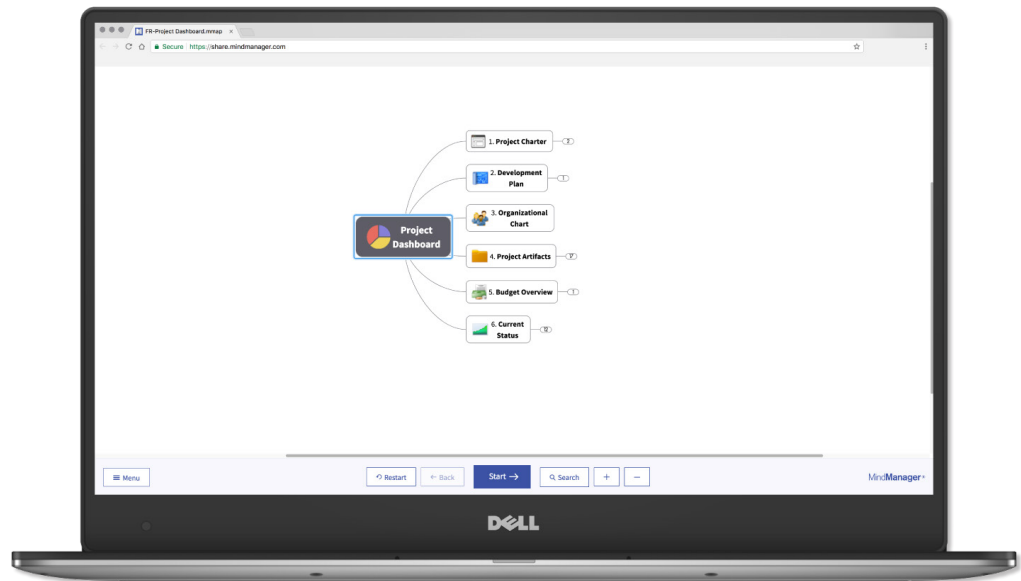
There really are no limits to how the latest generation of visualization and collaboration solutions can be used by project teams to improve both the effectiveness and the efficiency of project delivery, and that's something that is becoming ever more important for project success.

So why are these tools not in use in more projects?

THE BARRIERS TO ADOPTION — AND OVERCOMING THEM

If you ask any organization whether they have collaboration tools they'll tell you they do. In a recent survey more almost half of organizations asked said they had at least six different collaboration tools and 16% said they had more than ten.[3] The problem is, different organizations, and departments in those organizations often have a different view of what collaboration really is – hence the plethora of different tools. Many enterprise level tools (including project portfolio management or PPM platforms) claim to have collaboration modules included, but the functionality and usability are nowhere near the level of the best in class collaboration tools we are talking about here. What's more, many of them are evolutions of document management solutions that don't put visual representation of ideas at the heart of how they operate, creating more barriers to adoption and further limiting usefulness.

IT departments are reluctant to support too many department specific applications because of the perceived administrative overhead, even where those solutions are high value, low footprint products. That in turn frequently leads to business areas purchasing their own products which creates pockets of these visualization tools, but without the reach or leverage to deploy them enterprise wide as best practice applications.

Removing these barriers should not be difficult, but it does require conscious effort on the part of project managers and organizations. Both of those groups share the desire to make project delivery as effective and efficient as possible – generating the best possible business results for the limited project investment dollars available. Project managers need to identify the tools, techniques and work styles that provide the best possible chance of delivering that optimized value and organizations need to be prepared to make the investment in enabling it to occur across the entire organization.

If you are reading this then you want better collaboration on the projects you are involved in, and you know that visually oriented tools will deliver that improvement. Now you must take action to get access to those solutions:

- Identifying a champion in your organization to support you
- Defining your priority features and functionality
- Identifying solutions that match those needs
- Piloting preferred candidates with real projects and teams
- Committing to the best fit product and standardizing use across all projects and business areas

Some improvements to the way projects are delivered are difficult and time consuming. Improving collaboration through visualization is neither of those things – but the gains in effectiveness and efficiency, and by extension overall project performance, are just as real.

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3   Smartsheet.com "2017 State of Enterprise Collaboration" - https://www.smartsheet.com/2017-enterprise-collaboration-report

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