Selling Executives, Planning, and Post-Mortems

Wisdom from software PM Barbara Zirolli of Hewlett Packard

Vital Statistics	
Company/Title:	Senior Software Development Manager, Hewlett-Packard -- NonStop Enterprise Division (former Compaq Computers, formerly Tandem Computers)
Years in Industry:	16
Years in PM:	10
Project Specialties:	Infrastructure tools and applications (e.g., configuration management, content management and delivery, installation)

Cinda Voegtli, ProjectConnections.com's founder, sat down with Barbara Zirolli on Oct 29, 2002 at Barbara's office in Silicon Valley. What follows is a transcript of their discussion.

CINDA: Barbara, thanks for taking the time to sit down with us. The purpose of our new interviews is to give our members the chance to hear from fellow project managers--what they're doing, what is working in their companies, and their advice to others in the field, especially new project managers.

I can personally remember being a lonely new PM, learning as I went, and getting charged up when I had contact with an experienced PM who had advice for me--what was important, practical techniques to use. And now I go to conferences that senior PMs attend, and find that many are also interested in what their peers are working on, what has worked for them in their companies, how they're dealing with typical project challenges. So here we are to provide some of that online--thanks again.

Let's get started with some background.

CINDA: First, what's your role at Hewlett-Packard, and what kinds of projects are you involved in?

BARBARA: I've had several roles at NonStop Enterprise Divison over the years (Tandem was purchased by Compaq and recently, of course, purchased by HP).

At first I was a release program manager. I had over 250 products trying to prepare for release to customers, which included coordinating code freeze, function freeze, testing, packaging, and getting the product out to the customer. The projects were big multi-disciplinary efforts--my work was not tied to actual development of the products; instead I was responsible for integration of various products during and after development.

We made 2 major releases a year, with both releases touching every product--products are hardware, software, and firmware. Millions of lines of code change during these releases, with 250 products changing at a time. I did this for 3 years.

I next served as Program Manager for development of an enterprise content management system, a product that was developed inside the company to be used internally. The company faced lots of inefficiencies in how we delivered content (such as user manuals) to customers, so we undertook a major program to streamline that delivery, be able to give customers info they way they needed it, and make our publications operations more efficient.

Now I've moved into the development side of things and became development manager for an installation product. The focus of this position and the related projects is "How do you install all these hundreds of products onto an existing, installed NonStop system?" That process can get quite complex.

Let's talk about the content management program for a bit. How did that project get started?

We first had to sell the entire concept to upper management. They did not necessarily see why such a big internal development program was needed. To make them see it, we asked ourselves, "Where is Compaq going-- what is the company's mission and strategy?" Capellis [the former president of Compaq] kept emphasizing, "Everything must go to the Internet." We used that as our mantra. We looked at how customers were currently doing things, and how the Internet could help--and how our content management program would utilize the Internet to help.

It took us a year to sell the concept! We did some feasibility assessment along the way, for instance to find appropriate content management vendors so we wouldn't have to write code from scratch. Then we started planning: How are we going to get this done?

Who was on this content management system team?

We actually brought together several project teams. At the time, we had multiple groups in the Nonstop Enterprise Division doing version of content management in their areas. Manufacturing did document control. Another group did document management on all technical publications. Another group actually delivered the information to customers. We had to bring those three teams together. In the end 3 projects became a super program. I was overall program manager, and our overall team included these 3 groups.

How long was this project?

We've spent 2 years so far--from the start of selling the concept to upper management, to the end of the planning phase. Now the project is in design phase, getting ready to move into implementation. I have since been moved on to another critical effort. My main roles were to get the program concept and objectives defined, sell upper management on the concept, bring a team together, and get the initial planning done to scope the project.

So what are you working on now?

My current effort is enhancing the software installation mechanism used by our customers to install and manage software configurations on their NonStop servers. Right now, installing software on our enterprise systems (hardware platforms and software) can be very complex for customers. Many of our huge corporate clients need custom installation routines, given how much specialized hardware and applications they have running their mission critical business systems. We're talking call centers, reservation systems, etc. With our standard installation product, software has to be installed, then cloned to a huge number of processors, which can take weeks. The custom programs improve that--but we want to upgrade our standard installation product to automate and speed up the processes for these huge installations.

I'm getting to start the whole project. We have a BIG definition effort ahead--defining the architecture and how it will operate.

So who's on this team?

This one is quite interesting! We have 2 development teams here, one at Lake Tahoe, and one in Silicon Valley. The sustaining team for our current installation product is in India. Overall we have 18 people in development. We'll also have product management, and representatives from the Tandem International User Group.

Where are you in this project?

Right now we're talking to users and working on understanding their issues and objectives. Then we'll do feasibility analysis, including experimenting with different technologies, and zeroing in on a first pass plan: a rough schedule, overall sizing, and rough budget. We're also already starting program reviews with executives and will hold them every six weeks.

Now that you mention executives again, let me return to an earlier theme of yours--selling to executive management. You talk about it as though it's very natural to expect to spend a year selling execs on a program concept! I know some PMs don't think of this as part of their jobs. In fact they think it's "wrong" to have to sell. You don't seem to think so.

Oh, no. I see it like this: executives need to know what you're doing and why--and even if you've explained it before, even if they approved the project to begin with, you have to keep it fresh in their heads. Given everything they have to do in their positions, they can forget why they funded the project in the first place. If you find them saying "Why are we doing that? We don't need it," you can find your funding dwindling or pulled altogether. I think that spending time to educate them and remind them also helps them get more personally involved, even to the point where they'll start to ask, unbidden, how they can help. I like to get them asking questions such as "What can we do to help on this program…. how are you going to be able to accomplish this big objective?"

Can you give an example of how your approach to selling and working with the executives has helped one of your programs?

Yes, take the content management program. It was underway as the economy got into trouble. We got caught in the business climate, with the resulting effects many of us have experienced on our projects lately: shrinking project staff from attrition and retirements, without the ability to replace people. We were able to present this to our executive sponsor, with a re-planned schedule reflecting impact of staffing shortfalls. We also showed how we were trying to deal with the new environment. Our presentation showed, "Here are some innovative management things we've been thinking about. We can borrow resources from over here, put QA offshore," etc. We showed them alternatives to hold to the schedule. The executive sponsors appreciated that the team wasn't sitting there whining saying "We can't do it." They saw us working hard to try to meet our promised project goals. We got them involved in choosing among the alternatives for holding scope and schedule. Now this program is top 3 priority in that executive sponsor's area.

So how did you develop this ability to work with the executives, sell to them and keep them informed properly?

Well, it came over time. I used to take for granted that there's a sponsor, and that they knew what we're doing is important. I didn't think we needed to talk to anyone! Just put our heads down and get it done. It started dawning on me that that wasn't the case when I saw other projects becoming more of a priority with our sponsor. We didn't feel it when things going well, but as soon as the business climate got tighter, we saw less projects getting funded, and our requisitions for people not getting approved, projects not being able to get the capital equipment they needed after all. It then dawned on me that I couldn't expect it all to happen magically.

So my question became--How do I communicate what I need and why to my executives? I started by making 1-hour appointments with my sponsor. I requested it by saying "I have this project, I want to talk to you about it, and here's why." I found that in these informal briefing sessions, these executives sometimes asked really interesting questions, such as "How does this aspect of your project relate to this other effort going on over there," often relationships I hadn't even seen. They even showed me places where my project might not be as important to the business as I thought it was, might not fit into divisional priorities at the level I had thought. I started doing this with several executive stakeholders.

After your first meetings with each executive, what did you do?

After the one-on-ones with individual sponsors, I started presenting the program in periodic program reviews. To get started with these reviews, I looked at what other big programs were presenting to their sponsors, attended some of those meetings if they were public, took their examples, and designed my presentations.

So what do your ongoing briefings to the executives contain?

First and most importantly, we cover the business case for the program. I tell the sponsor why I think the project is important, and help her see it. We put it into context, covering what's going on in the market, why it's strategic for us to move this way, how it fits into the company's strategy. I get the Product Management team member to help me put that summary together. Then we cover what we're doing, who's working on the project, what we will accomplish, what our plan is, and what we need to succeed. For instance, we show that if we had more people or more capital, here's what else we could do--additional features or capabilities we could add.

Do you cover "project ROI" with the sponsors? I know PMs who want to cover this, but have a hard time coming up with "the number."

Yes, my sponsors want to know "What will it cost, and what will I get out of it." I do present an ROI, but at a very high level, and largely qualitative. I can't really put it down as "one number" for the programs I've been on. But I can give them an idea. My main goal is to have the sponsor understand my project and its contribution. I want to be "on her project priority list," and have enough of a relationship that when she does have more money, she thinks of me and my program and what that money could accomplish for the business if given to us.

Given what your sponsors want to know--"what will it cost and what will I get out of it," and your goal to "be on their project priority list"--for a division with multiple projects competing for resources, an executive would need to know this about every project to make decisions among

