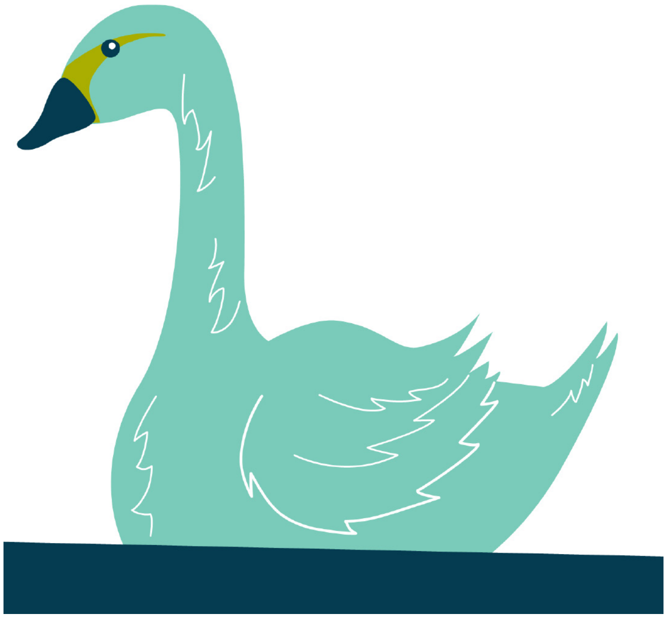
THE UGLY DUCKLING PART 3:

Managing Resistance to your Project Management Rollout

By Vanessa Edwards



Welcome to the third and final installment of the series titled *The Ugly Duckling: Project Management in a Creative Centric World*. In this final chapter, we'll discuss how to overcome some of the largest roadblocks to a successful Project Management discipline rollout.

Unfortunately, it's not enough to simply recognize the need for a Project Management discipline, or to create a detailed plan for how to roll out the new discipline. In order to be truly successful with your new PM discipline rollout, you will have to actively identify and prepare for potential blowback/setbacks by creating a series of contingencies that keep things on track. No theoretical constructs, please!

Throughout this article, we'll discuss real and relevant obstacles we've witnessed in agencies during this process, coupled with insights and recommendations for how to neutralize them.

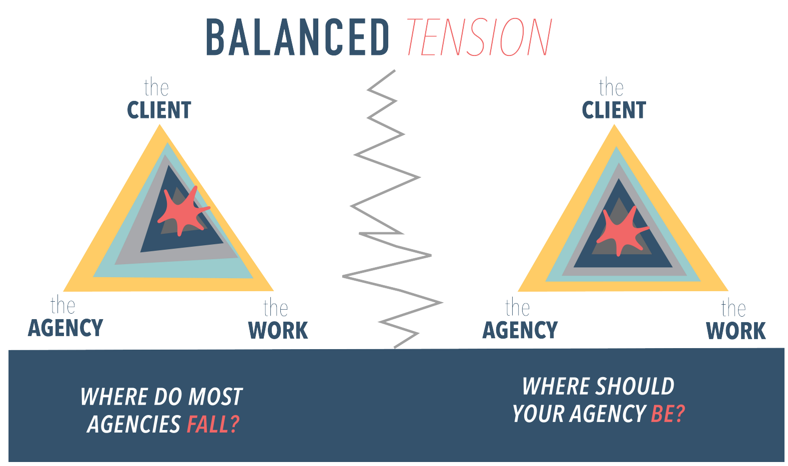
Roadblock 1: Misunderstanding the Value of Balanced Tension within an Agency

One of the most common roadblocks we see when agencies roll out an Integrated Project Management (IPM) discipline is that they misunderstand what Balanced Tension within the agency environment should look like. In order for this rollout to be successful, everyone in your agency must clearly understand that every person is an advocate for one of these three areas: The Work, The Client or The Agency. Some would argue that everyone should be an advocate for all three; however, on a practical (and operational) level, this leads to numerous compromises.

Without a clear understanding of who should be advocating what, you run the common risk of having an unbalanced, unhealthy agency tension, resulting in your agency skewing heavily in one direction (usually toward either The Work or The Client) and often leading to infighting and undue strain on the team. A simple example: an agency too heavily skewed for The Client often experiences depressed margins, high turnover, unrealistic client expectations and a strained culture. Don't worry, though; the client sure is happy. Well, at least until the next budget cycle and the next great pitch from another agency.

In healthy agencies, we see a good balance of tension between team members (especially Client Services, Project Management, Creative and Traffic/Resourcing) where each team member is clear on their area of priority – The Work, The Client or The Agency – as well as the priority of their coworkers. For example, if we look at several roles within an agency, we can clearly define which side they advocate for:

- Creative Director – The Work
- Resource Manager – The Work
- Director of Client Services – The Client
- Account Manager – The Client
- Project Manager – The Agency
- Finance/Operations – The Agency



Healthy organizations are constantly asking themselves questions that reinforce basic checks and balances between The Work, The Client and The Agency, e.g. Is this the right tactic to solve the client's business objectives? Do we have enough time to get it done right without killing anybody? Do we have the right people? Is this the right price? Is this our best work?, etc.

Our philosophy is that if you build a well-balanced tension between client advocacy, agency advocacy and advocacy for the work, then there isn't a need to process everything you do to death. Don't worry; this problem often fixes itself if you have the proper balance of people on your team.

In fact, the number of checks and balances you must actively "process in" is heavily dependent on how balanced the personnel in your agency are. Unfortunately, we realize achieving balance is much easier said than done, especially if all the founders of an organization have a tendency to favor the same advocacy, say *The Work*. If this is the case, then we strongly urge rounding out your management team, with members that can be credible and strong advocates in the remaining areas.

Roadblock 2: *Having the New PM Discipline Report to Client Services*

Having your new Project Management discipline report to your Client Services lead is potentially the most insurmountable challenge to a successful PM rollout. As we discussed in our second Ugly Duckling article, your new Project Management discipline should roll up to your Operations or Finance lead – NOT to your Client Services lead. At best, having your PM discipline report to your VP of Client Services is a conflict of interest, and at worst, it can lead to "strategic drift[1]" where the team is constantly getting a series of conflicting directives that lack a consistent focus and that don't deliver the desired results.

The **#1** responsibility of your Client Services team is to be the Client Advocate; their entire focus should be on doing what is best for the client and being the voice of the client in all internal agency conversations. However, the **#1** responsibility of your new Project Management team is to be the Agency Advocate, the voice of reason and profitability within the agency.

If your new PM discipline reports to your VP or Director of Client Services, you are likely setting them up to fail. You are placing them underneath the agency's largest *Client Advocate*, the person who's number one priority is to do what's best for the client – which should be balanced and tempered with what is best for the agency. We see this every day.

When PMs report to a VP or Director of Client Services, their opinions and concerns are often overlooked or overridden in favor of doing what is right for the client, leading PMs to question their contribution to the team and creating insecurity about the value of their role. Eventually, this conflicted management silences PMs and often stops them from raising concerns – allowing projects to run over budget, off schedule and out of scope. Why bring things up when you will always be overridden? This situation tends to lead to inoculation of budget, scope and schedule management across the whole agency, ultimately leading to lower agency profitability.

Because the Director of OPS/COO/CFO and Finance are the *Agency Advocate*, it makes the most sense to have the PM discipline live here, either through direct or matrix management (though we prefer an individual with strong leadership skills and influence who can really make the discipline flourish). Under this kind of leadership, your new PMs can voice their concerns about budgets, timelines, proposed estimates, etc. and know that they will have backing and support for their recommendations. Again, if this person is not a part of your team, then go find him/her **prior** to attempting a PM discipline rollout. Trust me on this! I can't emphasize how many times we've walked into a rollout that has cratered, only to find out there was no strong and/or appropriate leader in place for the PM discipline.

Roadblock 3: *Crippling your Project Management Discipline with Insufficient Training*

One of the most critical aspects of your PM launch being a success is providing the proper training to your new PMs. You can't take a "sink or swim" approach; if you want the PM rollout to be a success, you must invest in your PMs to make them successful! The most effective way to do that is by conducting comprehensive training for this new discipline. You wouldn't hire a team of new creatives and tell them to "go be creative," would you? How about telling Account Managers to just "go sell something"?

This is especially true if you have taken some of your existing Account Managers and transitioned them into PMs; even if Account Managers have been doing some Project Management in their current role, they are often unfamiliar with the intricacies of their new PM role. The last thing you want to do is just throw your Project Managers into their new positions without a detailed understanding of what makes a PM a PM and what workflow and responsibilities are required with the new rollout. Train your new PM team on the following things – at a minimum:

- The basic principles of good project management
- Overarching agency workflow and project specific workflows
- Schedule creation, management and risk analysis
- Bottom-up, detailed scoping and estimating
- Project financials, markup and margin
- Budget to actuals management (labor and expense)
- Mastering your agency's project management technology

If you've rolled out the new PM discipline well, everyone should already know how the PM role differs from the AM role, but they may not understand the foundational building blocks of project management, like

1. Handy, Charles The Age of Unreason, Hutchinson, London, 1989.

how to: manage project budget to actuals, define and manage a project workflow plan within the agency's creative process, track milestones and deliverables to keep projects on time and in scope, manage a project proactively instead of reactively, create a detailed bottom-up scope and estimate, use markup vs. margin, etc.

In addition to these basic principles of project management, you need to make sure your new PMs are also trained on any of your agency's specific project management processes, including detailed instruction on how to use your agency's PM tool(s), consistently and efficiently. And remember – make sure to have a manager, in-house, who has verifiable experience training staff in these areas and schedule PM training sessions which place an emphasis on industry best practices and the technology platform you employ. Ideally, training would employ the blend of industry and technology best practices into a single cohesive curriculum that is then adapted for your unique culture.

Roadblock 4: *Assuming that All Project Managers are Equal (Skills vs. Experience)*

Just like in any other discipline, Project Managers come in different shapes, sizes, skillsets and industry experience. Titles, years on the job or even agency experience don't necessarily mean they will have the tools necessary to be successful in your particular environment. The three most common mismatches we see are Brand PM vs. Subject Matter Expert (SME) PM, insufficient experience (AM or Traffic into PM) and great experience from other industries that simply does not translate well into the marketing services industry.

If you roll out your PM discipline with only junior PMs, they will have a difficult time advocating for the agency and thus affecting change, meaning that even with Project Managers, your projects may still run over budget, off schedule and out of scope. It takes a senior level PM, confident in their skillsets and abilities, to push back and truly be an *Agency Advocate*. Without senior representation on the Project Management team, certain tasks will naturally shift to the more senior levels of the Client Services or Accounting teams, resulting in a fractured Project Management discipline.

Another common hurdle that we see many agencies facing is not having the right mix of Brand vs. SME PMs. As we outlined in our second Ugly Duckling article, it's crucial that you understand what your agency's unique needs are so that you can include the right mix of Brand and SME PMs. Agencies who do mostly project- or campaign-based cross-discipline work, e.g. traditional print campaigns, simpler digital initiatives, brand strategy, etc., often only need Brand PMs who can provide project management for all types of projects.

However, we find that agencies who do a lot of cross-discipline work as part of an Agency of Record relationship tend to need both traditional Brand PMs and SME PMs. The Brand PMs should oversee their client's overarching portfolio of programs, campaigns and projects, while the SME PMs should focus on the detailed project management of their specific project expertise – e.g. Digital Producers, Video Producers, Broadcast Producers, Event Producers, etc. With this kind of PM relationship, it is crucial that the Brand PMs work in lock step with the SME PMs to develop accurate schedules, timelines, and estimates, and to effectively manage budget to actuals for the more complex SME projects. While the Brand PM is ultimately responsible for the overall AOR schedule and budget, the SME PM must be involved in the detailed schedule and budget management of the projects they are involved in since they have the expertise to best manage the details and risk mitigation for that type of project.

When your agency is highly niched in one capability, like Digital, then your PMs often need to serve the function of both a Brand PM ***and*** an SME PM. They need to have a deep understanding of the processes involved in your niched capabilities so they can effectively project manage all the details – but they must also manage the overarching portfolio of projects being provided to your client. For example, if you are providing multiple deliverables to your client within the same niche, e.g. a Website, an iPad app, and a Touch Screen program, then the same PM must be able to provide brand-level project management for ALL the projects within the client's program, in addition to providing their specific digital project management expertise. Also, in many instances, these agencies also support their clients' niched annual tactical planning initiatives, in which the PM would also play a vital role at the brand-level.

Another struggle we have encountered is when highly creative agencies hire PMP-certified Project Managers. The PMP certification is an incredibly valuable attribute for a PM – but, in our experience, it is less valuable for PMs within a marketing services environment. Unfortunately, a lot of the principles that make a PMP a great PM aren't as applicable to agency project management. We've seen a lot of PMP trained PMs get frustrated by agency project management, which can often be highly unpredictable and require a very flexible and nimble style of project and risk management.

I realize this sounds like a ton of variables to manage, however we believe as much thought should be put into onboarding/training and designing an optimal PM team as goes into a Creative or Client Services team. As in all things, you get what you pay and prepare for. Heavy turnover in your PM discipline is costly, time consuming and negatively impacts your culture.

Roadblock 5: *Lack of Visionary Leadership and Career Planning for PM Discipline*

If you want this PM discipline rollout to be a success (which I'm assuming you do, if you've read through our three articles related to the topic), you will need visionary leadership within your agency that can impart the importance, value and significance of this discipline to the entire agency. If you don't have a person who can clearly articulate the "what's in it for me"question, then things are pretty much doomed from the start. People are just too busy, with things moving too fast, for people to change attitudes and behaviors without a good reason. Without explicit data and a strong internal PR campaign to introduce and then reinforce the value of the discipline, you will inoculate your team from giving the discipline a second chance. What does this mean? It means that you will either never get a second chance…or worse, you will have to turnover valuable team members who have hardened themselves against another attempt at rolling out the discipline. We've seen the latter scenario, and it is ten times the pain the second time around.

Visionary leaders help people understand and embrace change; they communicate with enthusiasm, and are key to getting the entire agency excited for change. They have a clear idea for what the agency should look like, know exactly how to get there and are willing to roll up their sleeves to help bring everyone along with them.

These visionary leaders must be flexible and willing to adjust the PM discipline rollout as needed to ensure its success – which means that they need to be fluent in Project Management and not only understand, but respect and value its significance as a discrete discipline. These leaders are the backbone to this entire rollout, and as such, they should understand the PM discipline rollout from front to back and be willing to assist wherever needed to make it a success. They need to understand and anticipate all of the rollout's potential pitfalls and roadblocks, and have solutions for overcoming them. They don't just sit around, watching something fail; they step up and step in to help in whatever way they can.

Along with this visionary leadership driving these critical changes to your agency, you also need to communicate a clear growth plan for your new PM discipline. It's not enough to identify the titles you need to have when you initially roll out the discipline; you need to think further ahead and design a PM discipline that includes various levels of seniority and has a clear growth trajectory for all team members.

Your new PMs should NEVER aspire to grow into Client Services – that is NOT an appropriate growth trajectory for a PM. Instead, your PMs should have a growth plan similar to the growth plan for your Client Services team; where a junior PM knows that they can grow into a senior PM, then into a Project Supervisor, then to a Project Director and eventually, they could even lead the entire PM department – for example. It is imperative that you design a PM discipline structure with growth opportunities for your PMs so they are confident that the agency values the discipline.

In conclusion, designing and rolling out a successful Project Management discipline takes work – a lot of it. But the end result is worth it for your agency – projects that run more smoothly and efficiently, more profitable projects and clients, increased quality and timeliness of deliverables, better clarity surrounding roles and responsibilities, and increased accountability agency-wide, all resulting in a stronger and healthier agency culture (aka The Harmonious Agency).

About the Author:

Vanessa Edwards is a serial entrepreneur, professional jet pilot, former agency owner and founder of Creative Performance Inc, a consultancy that empowers agency owners to achieve their cultural, operational and profitability goals. As a FunctionFox, Workamajig and Oracle PLM partner, she has helped over a 100 marketing services organizations (agency + brand) through large-scale organizational change, complex technology deployments and strategic planning.

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P.S. On a personal note, I would like to express my gratitude for all of the great feedback we've received on this trilogy focused on People (People/ Process/Technology). Over the coming year, Jessica and I will be releasing subsequent articles focused on Process and Technology, which we hope will help agency managers and principals get their arms around improving agency profitability while simultaneously protecting creativity and culture. My best - Vanessa

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