Introduction

The following is a collection of observations, comments and words of advice from experienced ACT Project Leaders offered for your consideration. These are not rules. They are not things that work with every team, every client, and every project. Some may even be inconsistent, reflecting the fact that people have differing leadership styles and techniques. However, you may find a few gems here that fit your situation perfectly.

If you want to comment on any of the following tips or would like to add to your own experiences to this document, please do. We welcome your insights and know that others will benefit from them. Send your comments to info@stanfordact.org and we will get them to the right person.
Topics

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- Putting together your team

Client
- Find a client team member
- Setting expectations with client and determining project scope
- Be sensitive to organizational names

STAGE 2: Early Stages of the Launched Project

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- What to discuss at the kickoff meeting
  - In the first couple ACT team meetings, talk about team dynamics and get to know your volunteers, including
- Advice on conducting ongoing team meetings
- Importance of meeting minutes
- Workplan, team dynamics, and team structure
- Getting to it early in the project
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Client
- Keep the following issues in mind

STAGE 3: Mid to Late Project, Ongoing Project Management

Team
- Use resources wisely
- Reengage and offer an opt-out
- Draft final presentation
Client
*Expect changes and ongoing adjustments*

If the ACT team needs client staff support, as is usually the case, the team must have an effective means to get staff buy-in.

For the client, participation and buy-in are as important to the project’s success as are the specifics of ACT’s recommendations.

**STAGE 4: Post-Project Wrap Up**

Team
- Share project info
- Have a team party

Client
- Solicit feedback
- Reconnect with client
- 1 year client anniversary presentation
STAGE 1: PRE PROJECT

Team

**Putting together your team:**

- Team size. A good team size is 8 or 9 (including 2 project leaders). Over a 6 month project, it is not unusual attrition to have 1 - 2 team members leave (e.g., move, family issues). That leaves you with 4 - 7 GSB workers to complete the project. Assume 10-15% of people won’t deliver and create some redundancy.

- Team composition. If you have more than 6 - 7 applicants for the project, request that you be part of selecting who will comprise the team. Consider having at least one member who has worked for a major consulting firm. Consultants have a good sense of scoping the project to create a deliverable. You also want a mix of young and old. The younger members generally like to do the legwork and analyses. The older ones may bring access to contacts and credibility to the client.

- Share or delegate coordination and administration responsibilities to your co-project leader or designated team member.

Client

**Find a client team member:**

- Ask the client to contribute to the team the person who will be responsible for implementing the team’s recommendations. This provides them the context for whatever the final recommendations will be and adds some reality checks on your recommendations. At a minimum, this person should attend all team meetings and manage internal data collection. Depending on the individual, he/she could be a full time functioning member of the team.

**Setting expectations with client and determining project scope:**

- Refer to sounding board guidelines - it’s OK to say no to the client

- Sounding Board: Project leader validates project scope with client
You might uncover issues that aren’t part of the scope of the project
- ACT volunteers often want to help with other things, but it’s okay (best) to keep project focused (or to shut project down if issues interfere with execution)
- Meeting in person with both ED and board chair can help bring issues to surface
  - Ask probing questions
  - Dig into ED tenure, relationship with board
  - Going through the process of preparing the work plan can also identify particular issues

- Sometimes just observing without jumping straight to problem solving helps real issues come to light
  - Volunteers might be eager to jump out with suggested solutions; allow that process to happen, then table the proffered solutions and proceed to discovery

- Discovery can feel aimless and unstructured-- reassure the team that it’s normal and worthwhile, and that a clearer path to recommendations will emerge from the process.

- Scope project conservatively. Where possible, divide project into subtasks or issue areas which can be executed in parallel. Consider soliciting feedback or final screening of potential project scope by an independent experienced ACT project leader
- Have client agree on participation levels & follow-up reporting requirements

*Be sensitive to organizational names:*
- Clients are sensitive about the name of their organizations and any acronyms used to describe their organization and its components. Even if doing so is awkward and uses lots of space on your slides, do what the client does rather than using your own abbreviations or acronyms.
STAGE 2: PROJECT LAUNCHED – EARLY STAGES

Team

What to discuss at the kickoff meeting:

☑ Discuss expectations at kickoff. Have team members agree on working process norms and have full agreement going forward.

☑ Allocate enough time during kickoff meeting to schedule meetings and key milestones well in advance

☑ Email etiquette. Stress the importance of the team members carefully reading and promptly replying to email messages. As a project leader, you can get very frustrated if team members don’t read your messages completely and don’t reply promptly. Agree on a set of key words in message subject lines, such as always starting with “ACT {project}” and including “Action Required” or other indications of importance when appropriate.

☑ Decide on logistics (meeting places, tools to use)
  ○ Collaboration tools: Many free tools exist, e.g., Yahoo Groups, Google Docs, DropBox, Doodle or Meeting Wizard scheduling tool, Google Groups, ACT wiki, Stanford Alumni association social networking feature
  ○ Meeting places, conference calls: ACT can set up conference calls, free group conferencing tools, Group video Skype, GoToMeeting, WebEx, see ACT website for meeting places

In the first couple ACT team meetings, talk about team dynamics and get to know your volunteers, including:

☑ Ask members why they decided to volunteer to be an ACT volunteer, what their goals are for volunteering, skills, interests, thinkers vs. do-ers, willing to be a sub-team leader, time commitment, concerns

☑ If you have co-leader, learn his/her leadership style, e.g., participant or administrator; directive or collaborative
In the early stages of the project, it is okay to go quickly to conclusions and problem-solving, but then, having articulated your ideas, put them aside and continue fact-finding and brainstorming.

Volunteers may occasionally feel out-of-the-loop, especially if the team does not meet for a period of time or if the volunteer misses a meeting or two. This is normal and sometimes unavoidable. The team leader can mitigate this to some degree with frequent email up-dates and occasional phone calls. The volunteer should also take responsibility to recognize when s/he feels out-of-the-loop and talk with the team leader about it. Others may be feeling the same thing.

Advice on conducting ongoing team meetings:

ACT volunteers consistently report that they appreciate opportunities to interact with other GSB alumni. For this reason, err on the side of having too many team meetings rather than too few. You may wish to include time at the beginning of meetings for volunteers to report on anything special that is going on in their lives (but communicate that it is not necessary for everyone to have something to say).

Meeting scheduling is the most difficult part of an ACT project. It is rare to get every member of the team to any meeting. You would like them there for the kick-off and the final.

As the tasks break into sub-teams, have at least one member of each sub group in attendance to discuss findings and communicate next steps to their compatriots. The default meeting location would be at the client; however, depending on the team geographies it is probably feasible to meet at the business school or elsewhere.

At a given meeting, try to schedule two meeting dates ahead to maximize yield. At the beginning and end, you want to meet every 2-3 weeks. In the middle, meeting every 3-4 weeks is ok.

Provide an agenda and stick to it. People can stay and socialize afterwards if they choose, but you need to keep the business end focused. This clock provides the rationale for cutting off ramblings that can occur.
Feed the Team. Ask whether the client is willing to underwrite feeding the team. Feeding the team keeps them happy.

**Importance of meeting minutes:**

- Rotate the responsibility to take notes at each meeting. Do the first set yourself, as you will have the background from meeting with the client and set a high standard for the team. These minutes are critical given the inability to get every member to every meeting.

- Document decisions and results

- The minutes should clearly state the expectations for deliverables from each subgroup for the next meeting. This insures that you address this in the meeting and keeps the heat on team members to produce. Meeting minutes, draft presentations, interview notes, etc. should be posted on yahoogroups (or elsewhere) so they are always accessible to all team members.

**Work, Work, Work**

- The key to ACT projects is to try to structure 2-3 sub teams to execute the data collection and analyses. Assign 2 or 3 team members to each subtask or project area. This reduces your relevant meeting number from 9 members to 4-5 as you really only need one representative of each subgroup. The subgroups should be highly interactive between team meetings. It also means that you have subgroups that can be responsible for producing the bulk of the work plan and presentation components. THIS IS CRITICAL so the load does not fall on a single person (e.g., YOU).

- Make sure that the work plan and deliverable are appropriate to 10 hours per month per person on the margin and the predispositions of your team members. Better to under-promise and over-perform.

- Play to the strengths of your team members. As much as the intellectually correct work plan might be composed of A, B, and C, if no one is excited about doing C, it is unlikely to get done well given the marginal nature of an ACT project. Try to build it around what people want to do and are good at. If you cannot cover all
the bases, it might be better to opt out than to force people to do what is not natural for them (because it likely will not get done). Some ACT volunteers are good at and enjoy quantitative work. Some ACT volunteers are, by nature, problem fixers. Others come into the project with a strong disposition to apply their particular expertise or biases to the project more-or-less irrespective of the client’s needs. These predilections can be addressed broadly by reiterating as often as necessary the big picture in terms of the client context and the project goals.

- Manage maverick team members. Some mavericks are worth the additional management effort to keep them engaged with the team. For example, a team member who brings an unusual perspective to the issues may lead the team to insights otherwise missed. Disruptive behavior in team meetings can be due to initial nervousness and may go away as the person becomes more comfortable with the team. Sometimes a project leader can wait and see if group dynamics will work to mitigate the problem. If you perceive that a team member has a personal agenda, like setting up a paid consulting gig with the client, deal with it quickly and, if called for, ask the person to withdraw from the team (first consult with ACT’s ED).

- Production skills. Find out, upfront, if there is anyone on the team with production skills. See if they would be willing to invest some of their 10 hours / month producing what will be presented to the client (integrating the 2-3 components contributed by the subgroups). Alternatively, you might be able to get resources from the client to produce the slides.

*Getting to it early in the project:*

- “In retrospect, I think we should have gotten to the surveys earlier in the project. It turned out that we were doing them (the surveys) right at the end but it would have been useful to have that data earlier.”

*Hypothesis-driven projects work sometimes but not always:*
The big consulting firms begin projects with one or more hypotheses about what are the problems and solutions. The approach works for the consulting firms because the partner/senior consultants are typically very experienced in the client's industry or with the functional area of the project. With their experience, they are often able to hypothesize knowledgeably. This is not always so with an ACT project. If no one on the team has deep experience with the client’s issue, don’t force the hypothesis approach. Instead, explore in an open-ended way to learn as much as you can about the environment, the issues, what others are doing, etc. Later you can have brainstorming sessions during which the PL encourages team members to offer solution ideas while remaining open to different ideas as the team’s research findings emerge.

Client

Keep the following issues in mind:

- Board vs. staff -- who is our client?
- Variety of stakeholders, possibly conflicting goals, and need to build consensus
- Strong personalities among client leadership (board or staff) may be difficult to deal with
- Organization’s leader may not be ready to make decisions required as result of the project
- Organization’s volunteers may be the most powerful people in the organization
- Clients respond well to observations that are backed up by their own data.
STAGE 3: ONGOING PROJECT MANAGEMENT

Team

*Use resources wisely:*
- Use ACT website volunteer resources website (Project Leader Central)

*Reengage and offer an opt-out:*
- Re-engage volunteers who must temporarily halt or reduce participation. Often one or two team members will drift away from active participation during the project. Call them (don't use email) as soon as you notice this and try to find out why. To help maintain their involvement, you might assign wavering team members to sub-teams addressing topics that interest them, and try to pair them with energetic people. Be certain that all members perceive that there is enough challenging work for the team so everyone knows they are needed. If you are ever faced with really significant depletion of the team, be up front with the client and consider reducing project scope.
- Have other team members, not project leader, volunteer to pick up responsibility for team members who expect to be tied up during certain times
- Mix team assignments, change who works with whom
- Have clear deadlines (work backwards from certain milestones, like the final presentation, mid-term presentation). Assign specific responsibilities with deadlines (by making them accountable to the client and/or team, they look bad if they don't follow through on tasks)
- Bonus project for client – not the main project but it arises because of the team and/or project leader wanted to explore the issue, position to client as things they can think about
- Every project goes through a detailed phase where it's inherently less interesting. What to do? Work back from end date, show how it all fits in with the project, work back from the final presentation date.
Defining the project to reflect the interests of the team. Keep doing this as the project progresses. Ask group whether they want to get it done and if so, who will do what. Keep listening to what people like.

No matter how well you scope the project upfront, you never really know what you have, both client and team, until you get a couple of months under your belt. Give both the client and the team members an out after two months of working together. The hope is that if your team re-ups at two months, you will have them committed to generating a deliverable over the next 4 months. This is clearly delineated to client and team at the outset.

**Draft final presentation and choose a time for the final presentation:**

- You usually have a good sense of the answer after the first 1/3 of the case. This provides you a structure for thinking about what is really important to accomplish in the remainder of the case and where your data holes are. This is a really hard step for the team and might take a month or two more to really flesh out.

- Think about the communication style that you use
  - Start with positive and then talk about what can be improved, this makes the client more receptive to your message

- Final presentations are more effective if organized: Findings and conclusions first, supporting data after

- Keep recommendations clear and simple, considering the organization’s capacity to implement

- Prioritize recommendations, be wary of overwhelming client with too much info in the final presentation (use appendices)

- Make sure what you’re saying has basis, even if that basis is prior experience, and be careful of jumping to conclusions

- Set a limit on the number of slides, get team feedback, get client feedback on what they care about
  - Some PLs just provide a final PowerPoint presentation. Others like to write a report and provide slides, saying that writing a report helps them think
more critically. But the team might not have the energy to write a report. Either approach is fine. 

- Ideally, the final presentations to the client should occur when the board meeting is scheduled, so the project timeline should be created with that in mind.
- When the team disagrees on final recommendations, talk to the client about it to see if they want to hear both viewpoints.
- Provide a framework for implementation and measurement of the results of our recommendations.
- Provide 3 or 4 specific things the client can accomplish in the next 2 months (short-term)...what they can start doing right now. Put this next steps slide at the very end with timeframe.
- Leave time at the end of the presentation to discuss implementation issues

**Client**

*Expect changes and ongoing adjustments:*
- Project goals and activities may be redefined during the project, if the client agrees but be wary of expectations of “free” consulting -- need to control “scope creep”
- Clarify (and monitor) the amount of project involvement/work we ask the client to do
- Listening to the organization’s “customers” -- we often use surveys/interviews to collect data
- Test preliminary ideas with client leaders during the project - before formal presentations
- Naturally when you learn more about the client’s needs, new issues can come up, however, it might not be necessary to rewrite the work plan
- If you need to rewrite work plan, get approval from the client – use the work plan as a tool for communication so they know what they're going to get in the end
- If the ED leaves during the project, you can put the project on hold till a new ED is found and then resume the project
If funding changes and other significant events happen, adjust the timeline and consider the reduction of deliverables.

*If the ACT team needs client staff support, as is usually the case, the team must have an effective means to get staff buy-in.*
- Meet with key client people to get their input regarding the purpose and approach to and deliverables of the project.
- Ask the Executive Director to be present at important meetings with client staff.
- Design and present the project so that the staff believes it can help them with their jobs and is more than an unwelcome imposition on their already thin resources.

For the client, participation and buy-in are as important to the project’s success as are the specifics of ACT’s recommendations.
- Get broad staff involvement from the beginning with workshops or similar opportunities for people to get a sense of what is going on and to have an opportunity for input.
- As the process plays out, get updates to the staff via email, staff meetings, etc.
- Mid-project check-in very important – use the check-in to present key observations, tentative conclusions and recommendations to see if you are on track
- Organizational capacity assessment tool survey helped some groups agree on the problems that the group faces (OCAT). OCAT is a self-assessment tool, sent to employees (all or key), designed by McKinsey for non-profits. Everyone provides input. Used Survey Monkey to distribute. To download the tool, see: [http://www.vppartners.org/learning/mckinsey-vpp-ocat](http://www.vppartners.org/learning/mckinsey-vpp-ocat)
- Marketing survey of the public perception of organization can help make a case for the urgency of a name change
- ED/staff interpersonal dynamics, is ED style authoritarian? If the ED doesn’t connect with his/her staff, implementation of recommendations is in danger.
- Have the ED + board chair get together and bond, agree on what to do
Hold a retreat: Get key decision-makers in a room to discuss (gets people to feel they were heard and are more accepting) and then have someone decide

Form a working committee of the key opinion leaders in the client’s organization

Getting buy in: Common shared vision, consider what’s in it for me, inertia, surfacing objections, what are the real issues/problems – why is change being proposed

Board not appropriate because the environment has changed – ACT team told them what they needed to do, provided benchmarks for engagement, those who didn’t want to do it dropped out

Board brings ACT in to get rid of ED or the other way around, importance of Sounding Board, where does ACT fit in? Important to know how ACT fits early on

Validating ED’s direction to the staff, helping her/him refine her/his position

Keep the door open for input right through to the end and, when appropriate, incorporate staff input with attribution, e.g., attach a copy of an email as an addendum to the project report.

Have the client involved in the writing of the recommendations
STAGE 4: POST-PROJECT WRAP UP

Team

Share project info:
☐ Forward project info (project plan, midterm & final presentation) and other useful (reusable) products, e.g. frameworks, lessons learned or content (URLs etc.) to ACT office for posting on volunteer resources site and future team reference

Have a team party:
☐ Pat yourselves on the back! Feel good about the help you provided. Ask if ACT will reimburse the cost of dinner/celebration.

Client

Solicit feedback:
☐ Encourage client to provide feedback to GSB and show appreciation to team in some small way (pens, memo pads or t-shirts with client's name)

Reconnect with client:
☐ Contact client after 6 – 12 months to see how things are going and schedule post project review and ask for 12 month client report

1 year client anniversary presentation:
☐ After the final, ask the client to schedule a meeting at 1 year out to present to the team what they have done with the recommendations. This keeps the heat on them to work through the difficult parts of implementation as opposed to drop it and go back to life as usual. It is gratifying for the team if things have gone well; instructive for ACT if they have not.