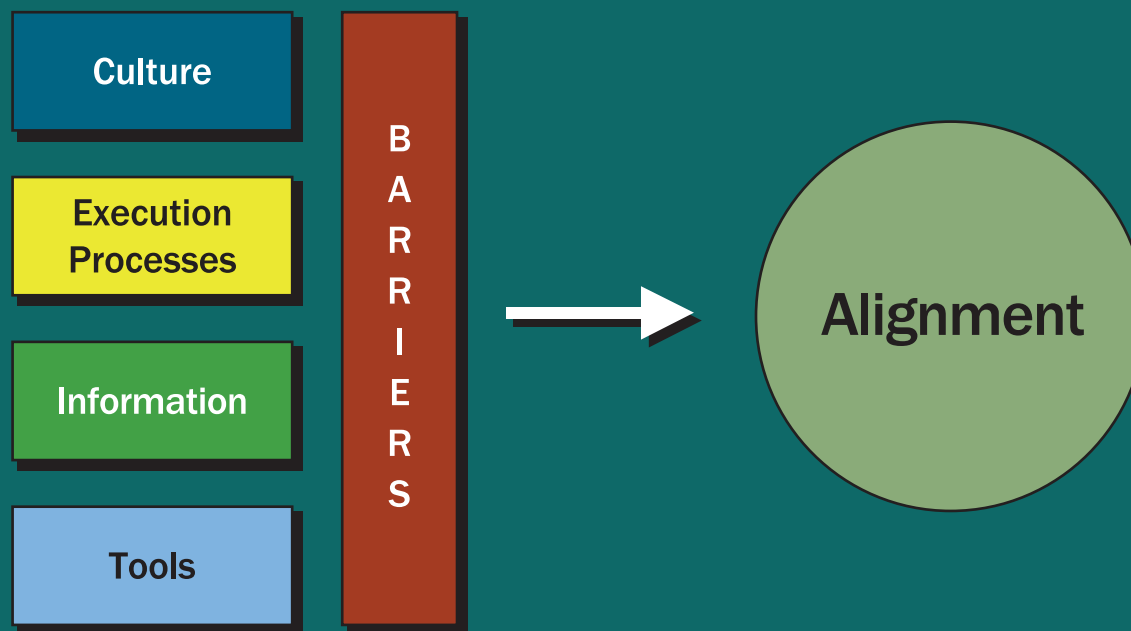


ALIGNMENT DURING PRE-PROJECT PLANNING

A Key to Project Success



Implementation Resource 113-3
Version 2.1

ALIGNMENT DURING PRE-PROJECT PLANNING

A Key to Project Success

Prepared by

Construction Industry Institute

Front End Planning Research Team

Updated by the Support for Pre-Project Planning Research Team

Implementation Resource 113-3

Version 2.1

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The University of Texas at Austin.

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Foreword

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Welcome to this second edition of *Alignment During Pre-Project Planning: A Key to Project Success*. The first edition of this document was developed and written by the Front End Planning Research Team (RT 113) and published in 1997. As part of its charter, the Support for Pre-Project Planning Research Team (RT 213) decided to review and update all CII pre-project planning documentation including this document. It used materials from the National Institute for Standards and Technology (NIST) Security Study performed by CII in 2003, as well as the collective knowledge of team members. Included in the update are clarification of the methods for using the alignment thermometer, updates to references, references to security and sustainability issues, and minor changes and clarifications throughout. RT 213 hopes that these changes improve the usability of the tool.

The 2009 update to version 2.1 provided Word™ and Excel™ versions of the Alignment Thermometer on the compact disc that accompanies this book.

Executive Summary

Alignment is an integral part of the pre-project planning process. As organizational structures continue to flatten, more projects are pursued using multi-disciplined teams and alliance partners. Alignment is needed to improve projects in this environment. CII research has shown a positive correlation between increased efforts to gain alignment in pre-project planning and project success. CII research also has identified issues that have the greatest effect on team alignment.

Executive-level project sponsors must do more than ensure that appropriate tools, technologies, and resources are being applied early in the project life cycle. They must realize the need for and benefits of alignment, and then must take a leadership role in nurturing and facilitating it.

This CII implementation resource explains the process of gaining and maintaining alignment. A diagnostic tool, the Alignment Thermometer, is included. It is an easy-to-use tool that measures project team alignment, indicates areas needing focus, and helps track team progress toward alignment.

As the pace of change in industry continues to accelerate, alignment will become increasingly critical. The concept of alignment is simple, yet must be managed as a key process. Talent and energy alone are not enough to ensure a successful project. Talent and energy must be focused on project objectives that support the business needs of the organization.

Chapter 1

Introduction and How to Use

1.1. Definition of Alignment*

As with any concept, a clear and specific definition is required so that the discussion can begin from a common starting point. Webster's Dictionary defines alignment as: "The condition of being in satisfactory adjustment or having the parts in proper relative position." The following definition of alignment provides a framework for the information presented in this implementation resource. In the context of pre-project planning, alignment may be defined more specifically as:

The condition where appropriate project participants are working within acceptable tolerances to develop and meet a uniformly defined and understood set of project objectives.

These project objectives must meet business or mission requirements, including security, and the overall organization's strategy. They are formed in the early stages of project development and have a critical impact on the success of the project delivery process.

Whenever a project planning team is formed with people from different functional groups, each team member brings the values and goals of their specific functional group. Their values and goals often conflict with the values and goals of those from other functional groups and also may conflict with the organization's overall project goals. Aligning the team involves developing clearly understood objectives for all team members and gaining the commitment to work toward those goals. At the end of the alignment process, each member is focused on the same set of project objectives. This concept is graphically illustrated in Figure 1.1 (next page) by the arrows that are bending to "align" in the same direction. Note that each individual arrow illustrated is still unique,

Without individual commitment, there is no alignment.

**Note to readers: Those familiar with alignment as described in CII Research Summary 113-1 may wish to go directly to Chapter 3 for a discussion of the Alignment Thermometer.*

Alignment: The condition where appropriate project participants are working within acceptable tolerances to develop and meet a uniformly defined and understood set of project objectives.

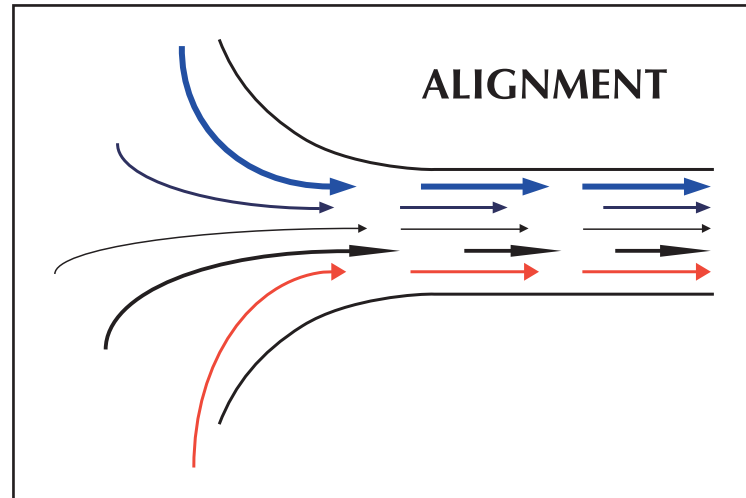


Figure 1.1. Graphical Representation of Alignment

representing different experiences and specialties. Alignment does not imply eliminating differences, but focuses the different team members on the same objective(s).

An appropriate analogy of a misaligned project is that of driving a car with the front end out of alignment. Three unfortunate consequences may occur: the ride is uncomfortable for the passengers; the tires wear out quickly; and the car may run off the road. The same may be said of a project team out of alignment. None of the outcomes of the project is entirely satisfactory, and the participants are in a constant struggle to maintain their own individual viewpoints.

In the project environment, alignment exists in three dimensions. These three dimensions are illustrated in Figure 1.2. The first dimension, vertical, involves top-to-bottom alignment within an organization. The company executives, business managers, project managers, and functional specialists within each stakeholder organization must be well-aligned. The second, horizontal, involves the cross-organizational alignment between functional groups within organizations. Different organizations with a stake in the project must also be well-aligned. For example, the business,

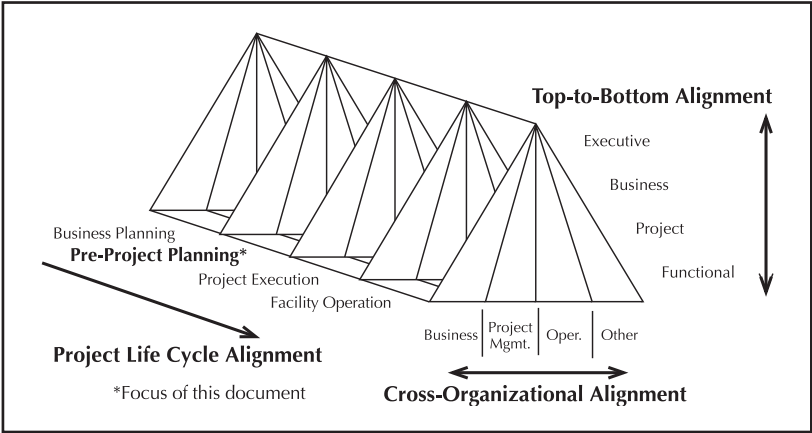


Figure 1.2. 3-D Schematic of Organizational Alignment for a Project

project management, and operations groups, as well as other stakeholder groups such as outside contractors, must be well-aligned with the project objectives and priorities. The third dimension, longitudinal, involves alignment of objectives throughout the project life cycle.

Projects are typically dynamic, especially in the early planning phases. The critical issues and decisions change as a project goes through its life cycle. The figure below (Figure 1.3) graphically illustrates this concept. The curve labeled “influence” in the figure reflects a team’s ability to affect

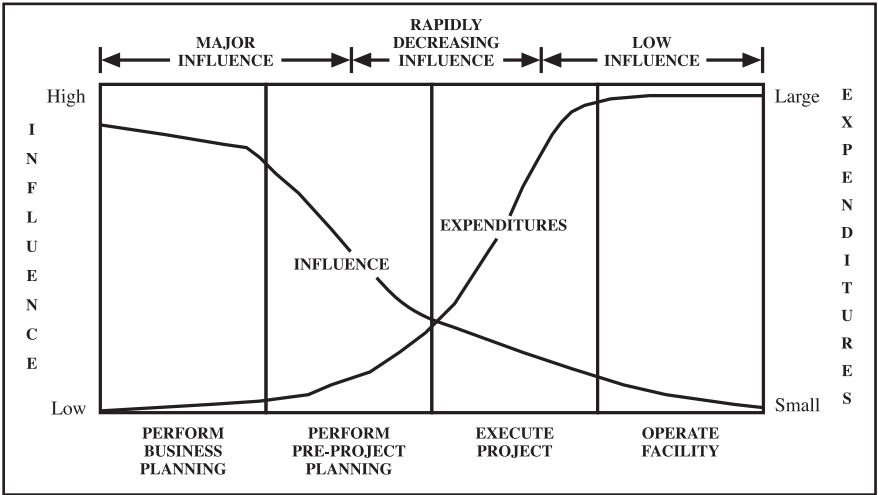


Figure 1.3. The Dynamics of Influence and Expenditures

the outcome of a project during the project life cycle. As the diagram indicates, it is much easier to influence a project's outcome during the early project stages, when expenditures are relatively minimal, than it is to affect the outcome during the later stages of the project (project execution and operation of the facility). Each successive stage must be well-aligned with the previous stage. Failure to address any one of the dimensions shown in Figure 1.3 can cause a serious breakdown.

This implementation resource focuses on alignment during pre-project planning.

This document is primarily focused on alignment during pre-project planning. Alignment, however, is important in all project phases.

CII defines pre-project planning as the process of developing sufficient strategic information with which owners can address risk and decide to commit resources to maximize the chance for a successful project. Pre-project planning has many aliases such as front-end loading, front-end planning, vulnerability assessment, feasibility analysis, programming, conceptual planning, and others. Pre-project planning, in effect, bridges the gaps between business and detailed design. The pre-project planning team may include owners, planners, consultants, engineers, and contractors. Previous research and benchmarking have shown that good pre-project planning improves project performance.

Issues that affect alignment during pre-project planning can be divided into five categories. These categories identify areas that project teams can address to improve alignment. The five categories of alignment issues include:

1. **Culture:** The attitudes, values, behavior, and environment of the company and the pre-project planning team.
2. **Execution Processes:** Project systems, processes, and procedures.

-
3. **Information:** The data elements, including business objectives, used to define the scope of the project.
 4. **Project Planning Tools:** Tools such as software programs, checklists, and aide-memoirs that are typically used to develop and manage projects.
 5. **Barriers:** The obstacles to creating and maintaining alignment.

1.2. Why Teams Need Alignment

Managing projects is challenging. Many practitioners feel that the most challenging aspects of project management are more behavioral than quantitative. Proper alignment of the project team will positively affect behaviors and result in a team that is focused on a common set of project objectives. Alignment will help the team resolve conflicts and overcome barriers to the benefit of all. The following discussion outlines some of the problems that must be dealt with through alignment.

Specialists tend to take off and “do their own thing.”

Projects are becoming increasingly complex and competitive organizations must quickly adopt appropriate innovations or risk losing competitive advantages. No one can possibly keep up with all the advances in business, science, and engineering related to their industry. Different individuals within a company do try to stay current in specific fields. Wasted effort may result when different technology approaches are pursued for the same project.

Alignment during the pre-project planning phase helps to ensure that the individual specialties are represented and are given the opportunity to contribute their knowledge in forming the project objectives. Without proper alignment, critical knowledge may be ignored or not discovered until it is too late.

Mixed stakeholders cause project complexity.

The business environment under which projects are planned and executed is increasingly more integrated. Projects are developed using a wide range of relationships including joint ventures, partnerships with government, formal contracts, and associations of companies within the same industry. Mixed in with the formal relationships are the concerns of informal stakeholders such as government regulatory agencies and the public. Increasing attention to the requirements of effective security add to project complexity. Sustainability brings an entirely new paradigm to the design and construction process. As a result, a relatively simple project may have a large number of stakeholders. Obviously those different stakeholders will frequently have conflicting objectives for the same project.

Proper alignment during pre-project planning involves the communication, negotiation, and compromise required to gain stakeholder commitment to overall project objectives. Remember, stakeholders are not just people involved directly in the project, but are individuals who can seriously hamper the project. Their needs must be considered as well.

Decentralized decision-makers increase the need for coordination. Multi-organizational, joint ventures with outside contractors or joint project sponsors only add to the problem of alignment.

Current trends in business structure are toward flatter organizations with more shared decision-making authority. In addition to less hierarchical structures, business conditions have resulted in companies outsourcing functions deemed not critical to the mission of the organization. These two trends produce project teams with decentralized decision-making authority.

On a complex project, different groups may be located in distant cities or even in different countries. These groups may be working for the owner,

a design/engineering firm, a contractor, or a consulting organization. In this dynamic environment, many different team members are making critical project decisions on a daily basis. Without proper alignment, the many different decision makers are likely to make decisions that are in direct conflict with one another, as illustrated in Figure 1.4. Decisions that are in direct conflict tend to produce no progress in any direction. When the various decision makers on a project team are all aligned in the same direction, however, the resulting forces join to produce greater progress.

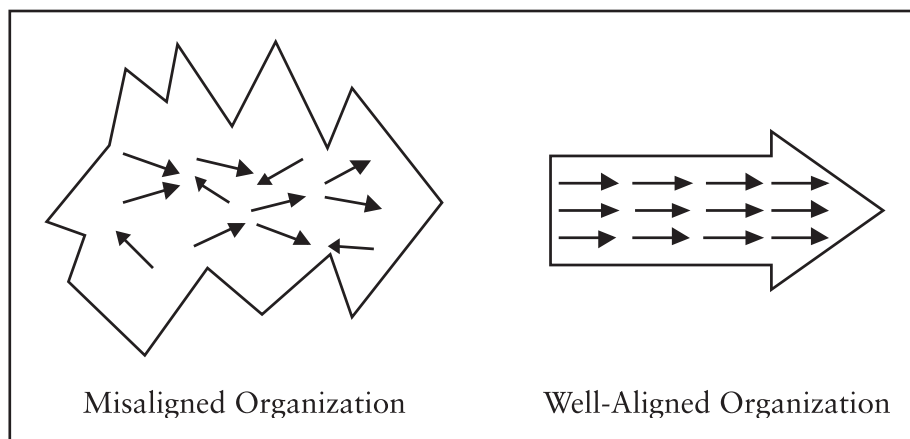


Figure 1.4. Illustration of Misaligned and Well-Aligned Organizations

The more critical project cycle time becomes, the more important alignment is.

Reducing project cycle time is a recurring theme in managing projects. Completion dates are often driven by external conditions beyond the control of the project team. Globalization of markets and increasing demand by customers have reduced market windows for products and services in virtually every industry. At the same time, available funds continue to be limited. This situation requires more efficient use of capital in the selection, planning, and execution of projects.

Reason for project problem: “The pre-project planning phase took longer because of team alignment problems.”

— An Owner’s Project Manager

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Limits on available time and money are nothing new to the industry, but the changing environment has put additional pressure on project schedules and budgets. A well-aligned team, focused on a common set of project objectives, is less likely to wander off course. This improved efficiency helps keep projects on the required time table.

Aligned teams work from the “same sheet of music.”

Team alignment is critical to overcoming the obstacles commonly faced by project teams. Project complexity, diverse stakeholder groups with conflicting priorities, flat organizations with shared decision-making responsibility, and limits on both time and money are all addressed with proper team alignment during the pre-project planning phase. The question remains: How does a project team best develop and maintain alignment during the pre-project planning of a complex capital facility project?

1.3. Critical Alignment Issues

The 10 critical issues that have the greatest effect on team alignment during pre-project planning are:

1. Stakeholders are appropriately represented on the project team.
2. Project leadership is defined, effective, and accountable.
3. The priority between cost, schedule, and required project quality features is clear.
4. Communication within the team and with stakeholders is open and effective.
5. Team meetings are timely and productive.
6. The team culture fosters trust, honesty, and shared values.
7. The pre-project planning process includes sufficient funding, schedule, and scope to meet objectives.

-
8. The reward and recognition system promotes meeting project objectives.
 9. Teamwork and team building programs are effective.
 10. Planning tools (e.g., checklists, simulations, and work flow diagrams) are effectively used.

When project teams focus on these 10 issues during pre-project planning, alignment improves and the likelihood of a successful project are greatly increased. The 10 critical alignment issues are categorized in Table 1.1.

Table 1.1. Ten Alignment Issues Categorized

Category*	Issue (rank)	Page Number
<i>Culture</i>		13
	Effective Project Leadership (2) Open and Effective Communication (4) Trust, Honesty, and Shared Values (6)	
<i>Execution Processes</i>		21
	Appropriate Stakeholders Represented (1) Structured and Resourced Pre-Project Planning Process (7) Suitable Reward and Recognition Systems (8)	
<i>Information</i>		31
	Priority Between Costs, Schedule, and Features (3)	
<i>Tools</i>		34
	Timely and Productive Team Meetings (5) Teamwork and Team Building Programs (9) Use of Planning Tools (10)	

* Barriers to alignment are typically the antithesis of these 10 issues and therefore are not included in this table.

1.4. How to Use This Book

The model given in Figure 1.5 will be used as a guide to introduce each topic of Chapter 2 and can aid in determining one's position in the process. Within each section, the highlighted icon represents the center of discussion.

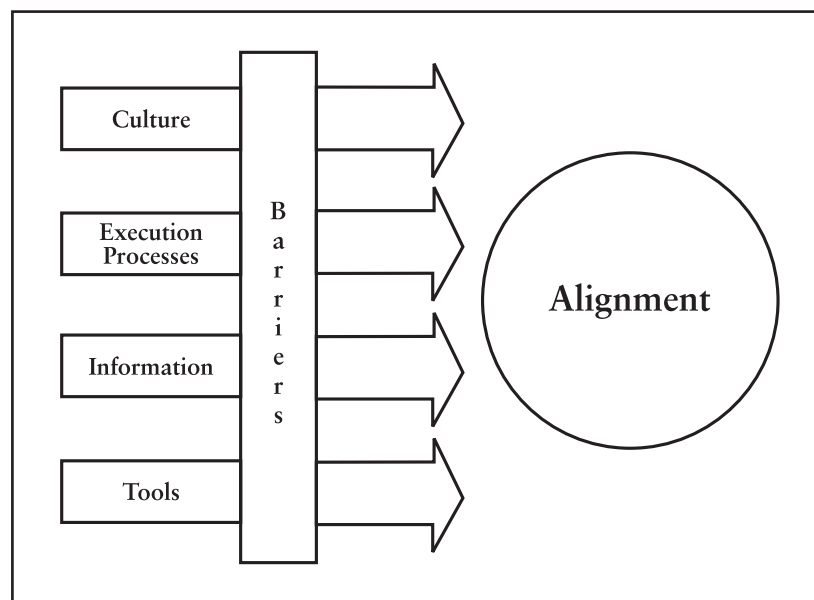


Figure 1.5. Alignment Process Icon

In addition, quotations are given to underscore the importance and applicability of the material. These quotations and other data introduced in the discussion were gathered during the detailed research investigation that forms the basis for this document.

Chapter 3 introduces the Alignment Thermometer and includes an example of how to use it. It also includes its uses in gaining and maintaining alignment. Chapter 4 describes best practices and the integration of information developed by CII that can be used to improve the pre-project planning process on capital projects. Chapter 4 also presents a path forward for users of this implementation resource.

Chapter 2

Process of Gaining and Maintaining Alignment

This chapter discusses the 10 critical alignment issues in more detail, addresses how each affects alignment, and recommends practices to improve their performance.

The process for gaining and maintaining alignment is illustrated in Figure 2.1. Alignment itself is presented as a circle because it is a “state of being” that requires action throughout the project life cycle.

“When we have gone back and done a postmortem on many of our projects that did not turn out well, several things seem to always come up and poor alignment is one of those things.”

— A Business Unit Manager

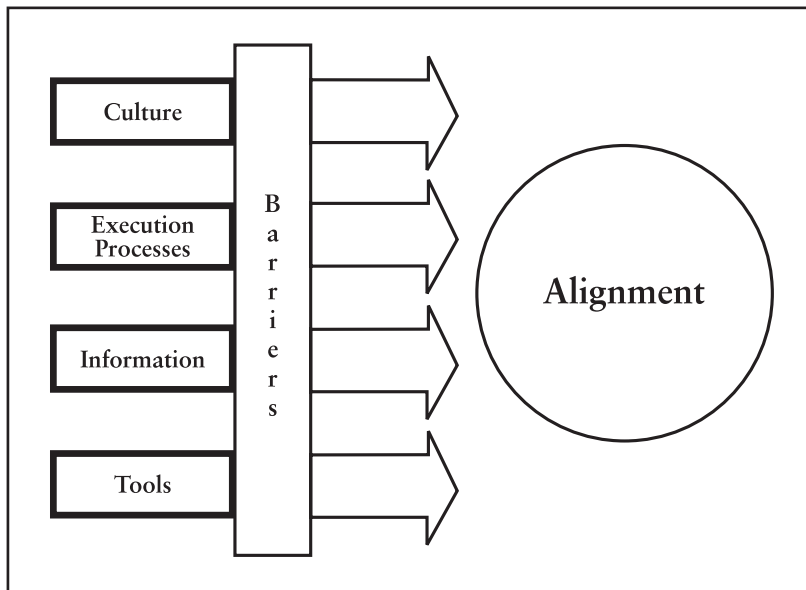


Figure 2.1. Process for Gaining and Maintaining Alignment

Each of the five categories shown in the diagram represents a different area that must be addressed to ensure alignment is gained and maintained. The project team and sponsors must:

- Establish the proper culture to support the project environment.
- Utilize standardized work processes during execution.
- Define and communicate project-related information effectively.
- Use appropriate project planning tools to enhance team performance.

- Be aware of barriers that can adversely affect the process and take steps to overcome them.

The following five subsections will address each of these categories in depth. The subsection will begin with a brief definition of the category (i.e., culture or information) followed by a discussion of the key issues making up that category. Each issue will be further described in terms of how it affects alignment, and recommended practices will be given to help the user foster alignment. These discussions will be augmented with an alignment process icon and selected quotes to clarify the intent of the issue. Each subsection will end with a discussion of other issues having an effect on the alignment category.

To help the reader, a glossary of related terms is contained in Appendix B. A list of related references for each subsection is presented in Appendix D.

“Trust is the driver for everything. Within the company and between them as well as with the contractor. We are actively trying to change our culture.”

— A Business Unit Manager

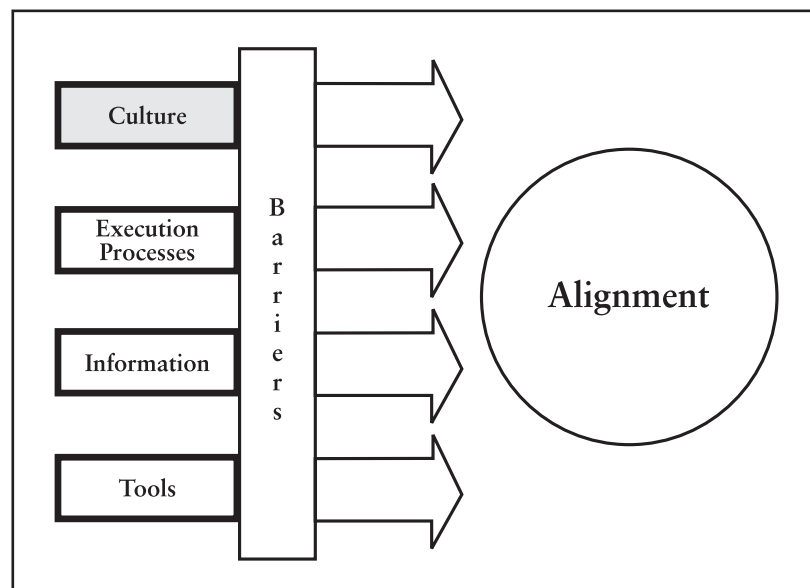
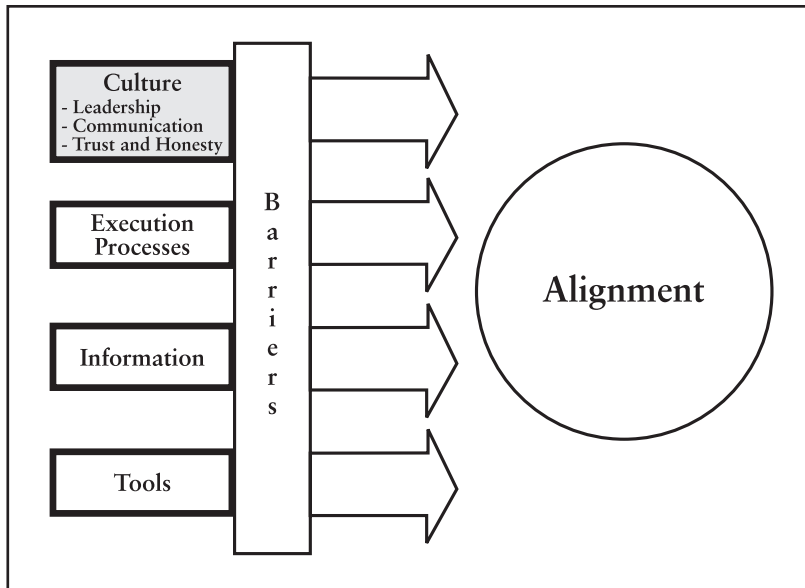


Figure 2.1. Process for Gaining and Maintaining Alignment

2.1. Establish Culture



Definition

Culture is the attitudes, values, behavior, and environment of the organization that affects the relationship of individuals involved in day-to-day business operations.

Culture is a pattern of shared basic assumptions that a group teaches to new members as the correct way to perceive, think, feel, and behave. The topic of organizational culture has been extensively covered in a number of business and management publications. This document, however, is focused on identifying culture issues that have a significant effect on team alignment during the pre-project planning phase of a capital project. Three specific cultural issues deserve particular attention.

Reason for project problem: “.....(needed a) better understanding of authority. Better owner team leadership.”

— A Contractor Representative

The leader’s primary objective should be to create an environment for the team to succeed.

Key Issues

The three issues cited in this section are interrelated in many aspects. Effective leadership is essential to developing efficient communication. Clear and effective communication requires trust and honesty. Leadership is a driving force behind developing an environment of trust and honesty on the team. This section discusses these three issues separately. However, any effort to affect cultural change needs to consider the interrelationship between these three issues.

Key Culture Issue: Project leadership is defined, effective, and accountable.

Project sponsors must be committed to developing and supporting effective team leadership because it will positively influence team members’ commitment to project objectives. The project leadership must be knowledgeable of the pre-project planning process and be technically proficient. The leaders also should have defined responsibilities, be accountable for results, and remain focused.

How Defined, Effective, and Accountable Leadership Affects Alignment

CII defines leadership as “the process of providing a clear, unambiguous vision for a project, an unwavering commitment, full support and total involvement in the effort...doing the right things.” During pre-project planning, the project leader functions as the focal point for all the various project stakeholders interested in the project.

The leader’s primary role is that of communicator. The project leader is responsible for insuring that the project objectives are clearly defined, communicated, and understood by all the team members. In addition, a good leader will create and communicate the vision of a successful project. Effective leadership during this phase of the project must consider all the

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desires, opinions, and requirements of the many project stakeholders and form a unifying vision of the overall project goals and objectives.

Once this vision is formed, the leader is then responsible for maintaining the team's focus on the vision. Effective leaders are able to get the team excited about the vision, gain commitment to reach that vision, and are diligent in their actions toward that vision. This process contributes to alignment by forming a common set of project objectives and by developing commitment to those objectives. As previously stated, commitment is critical to alignment.

Defined, Effective and Accountable Leadership: Recommended Practices

One concrete recommendation for organizations entering the pre-project planning process is to identify a leader skilled in pre-project planning and to support this leader when dealing with the various stakeholder functional groups. Pre-project planning should be treated as a separate “project” requiring a clearly identified leader complete with both responsibility for the results of the planning process and the authority to make it happen. Too many organizations do not place enough emphasis during this stage and the process is simply passed from functional group to functional group.

Identify and select the leader early in the project, and then support the leader.

Organizations must place emphasis on training key individuals in the pre-project planning process. All too often, a project team sets out to define and establish a plan for a new project, but it has no grasp of the pre-project planning process. Good people will flounder and develop a plan that is poorly defined, out of alignment, and difficult to execute.

During this phase, the leader's primary responsibility should be to:

1. Identify and communicate the business objectives.
2. Help the team to establish project goals in alignment with business objectives.
3. Produce a well defined scope of work.

Effective communication is the responsibility of the project leadership.

The leader should be a good listener.

Reason for project problem: “Need open communication and higher levels of trust.”

— An Owner’s Project Manager

The project leader serves as a gatherer of information, a negotiator, and facilitator of the pre-project planning process. This requires that the leader be technically competent in the areas covered by the project and possess excellent listening and communicating skills. A primary function of the leader during this phase is to decide on competing alternatives. Tasks may include:

1. Seeking requirements (i.e., the needs and expectations) of stakeholders (empathic listening).
2. Seeking technical advice (gathering information).
3. Analyzing information for technical merit (information analysis).
4. Selling the selected alternative(s) to stakeholders (negotiation).

Finally, the project leader sometimes does not possess a great deal of organizational power because the team members are assigned only part-time and individually supervised by other managers. The leader must have the ability to resolve conflicting input quickly so that differences of opinion do not adversely impact team performance.

Key Culture Issue: Communication within the team and with stakeholders is open and effective.

Establishing open and effective communication between all members of the pre-project planning team is essential. This involves breaking down structural barriers to communication and utilizing advanced communications technologies to facilitate communication.

How Open and Effective Communication Affects Alignment

Communication includes all the activities and behaviors by which information or ideas are transferred to others. Communication during

the pre-project planning phase is difficult for reasons such as the iterative nature of the pre-project planning process, the large amount of stakeholder involvement, and the relative “non-dimensional” nature of the work. The early planning phase of a project is characterized by many decisions that will significantly affect the entire project. Examples include site selection, technology alternatives, execution approaches, security considerations, and trade-offs between cost and schedule constraints. Communication is critical because on most projects this is a period of dramatically changing scope and limited amounts of time and resources available.

Managing communication during pre-project planning is difficult.

Many project problems can be attributed to poor communication. A project team consisting of individuals with poor communication skills will be less than successful. Creating an environment for honest, open communication is the challenge for the leader and every team member. If communication cannot be established, alignment is impossible and the chances of a successful project are diminished. Many organizations have found the use of third party facilitators has helped overcome communication barriers.

Communication must be two-way.

Good communication keeps people informed of these decisions. This cycle of information sharing and feedback not only contributes to alignment by informing team members of the project objectives and important decisions, but also develops commitment by providing opportunities for feedback and participation in those decisions. The use of an outside or third party facilitator may be beneficial to breaking down communication barriers.

Open and Effective Communication: Recommended Practices

In order for an exchange of information to be defined as true communication, it must be two-way. All channels and forms of communication must be two-way so that the ideas and requirements of the project stakeholders are actually received and evaluated. Use of

Use tools and technology to enhance communication.

communication graphics for the project to illustrate lines of communication between different stakeholder groups may be helpful. These diagrams can illustrate complexities and the hierarchy of information flow. Voice mail, facsimile, e-mail, video conferencing, group-ware, and computerized information management systems are all tools available to improve the two-way flow of information and ideas.

Communication should be open and timely. Team meetings, newsletters, websites, storyboards, and other methods also can be used to keep the team informed of progress and problems. Team members and key stakeholders should constantly be in contact.

Key Culture Issue: The team culture fosters trust, honesty, and shared values.

“We need to improve the level of trust — focus on the problems. History of past project failures are related to relationships between groups within the company.”

— A Business Manager

Treat others as you would like to be treated.

Trust and honesty are major aspects of the culture of an organization. Team leadership should develop a team culture of trust and honesty so that members can maintain open, synergistic relationships. This culture is influenced by the organizational cultures that interact with it. However, the team leadership must form its own culture. This may require cultural changes for team members, and a great deal of time and commitment may be necessary to overcome these difficulties. The team leadership must ensure that trust and honesty are fostered within the team culture.

CII defines trust as “the confidence and reliance one party has in the professional competence and integrity of the other party to successfully execute a project in the spirit of open communication and fairness.” CII research has shown a direct relationship between trust among project participants during the design and construction of the facility and the cost of the constructed facility. This relationship is magnified during pre-project planning.

How Fostering Trust and Honesty Affects Alignment

Project teams are made up of different functional groups with seemingly conflicting priorities for the same project. These groups often have no history of working together and may not understand everyone's role in the project. This condition fosters an environment of distrust and conflict. As project decisions are negotiated, these groups often view one another as adversaries and approach the decision as a "win-lose" proposition. Without trust and honesty on the project team, each group will not be as cooperative in understanding the other side's needs. As a result, decisions may be based on incomplete information, which can result in a less than optimal outcome.

In an environment of trust and honesty, project decisions are based on the best available information. The entire team is more likely to be committed to those decisions because they feel comfortable that their interests were considered and that they were treated fairly.

Without trust and honesty, mistrust and no cooperation become evident.

Fostering Trust and Honesty: Recommended Practices

Teams often develop characteristics that reflect the culture of the organization(s) in which the team operates. The project leadership has a tremendous amount of influence on team culture. During the pre-project planning stage, the leadership should focus on promoting trust and honesty.

The leadership sets the example.

"Kick-off" meetings are important in establishing a positive tone for the team. Including project sponsors in the kickoff meeting often helps. Such meetings should be used to clearly communicate the need for trust and honesty on the team. Project leaders and project sponsors should provide the team with as much accurate information as possible regarding the business reasons for the project, economic basis of the project, priorities, and required market windows. Leaders should be honest and straightforward because project team members usually know

Trust is earned, but can be quickly lost through dishonesty and unfair behavior.

when the leadership is not giving them all the relevant information. If the leadership is unwilling to confide in the team, how can it expect the team to develop a culture of trust and honesty? If budget and schedule estimates are not believable, how can trust be fostered?

Throughout the entire pre-project planning process, the project team should approach conflicts and important decisions by honestly portraying the situation and not hiding relevant information. Many books on negotiation techniques discuss the “win-win” approach to resolving conflicts. The project team should also address all major project decisions as a collaborative negotiation that seeks to find a “win-win” solution.

Other Related Culture Issues

Reason for project problem:

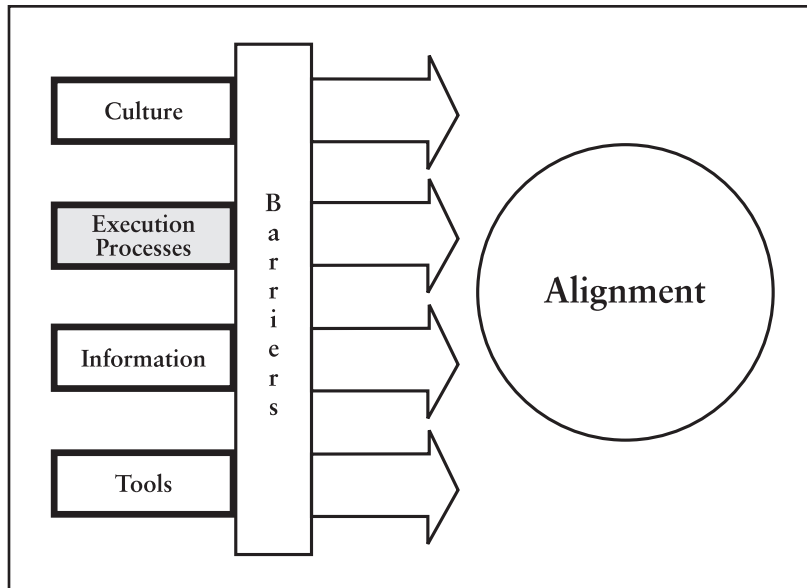
“...project involved a new company we purchased. The culture clash between two companies when one is joined with the other is a problem.”

— A Business Manager

In addition to the three key issues cited in this section, the project team may also wish to evaluate its performance in these two areas:

- *Clear corporate mission and vision.* A clear corporate mission and vision can help the project team direct its efforts. Without such guidance, team members may have difficulty understanding their roles and narrow their interests to the detriment of the project.
- *Uniform and clear approach to risk.* A clear approach to risk communicated by the organization or sponsor can help the team pursue a shared approach to the development of scope and foster the team culture.

2.2. Utilize Execution Processes



Definition

Execution Processes are project systems, processes, and procedures that enhance alignment of the project team during pre-project planning.

Execution processes encompass the formalized systems adopted by the project organization. In some organizations these systems are uniformly applied from project to project, while others begin every project with no firmly established procedures.

Three specific execution processes are significant in achieving and maintaining team alignment. These three processes are issues that need to be addressed by the owner organization beginning at project inception and should be incorporated into a standard approach to implementing projects. In this section, each of the three issues is discussed in detail.