

Chapter 10: Collaborative Agreements

Tables within Text

For your convenience, I've provided the table from the chapter text to remind you where we get to while you are working on the exercise that follows.

First, we defined the date of the next handoff from one division to another:

Business Unit	BU Initiatives	Design	Production	Shipping
North	[Initiative NA]			
	Initiative NA1	8/31/2015		
	Initiative NA2		10/15/2015	
East	Initiative EB			
South	Initiative SC			11/30/2015
South	Initiative SD	9/30/2015		
East	Initiative ED			
North	Missing			
East	Initiative EE			10/31/2015
South	Initiative SF		11/15/2015	
North	[Initiative NG]			
	Initiative NG1			8/31/2015
	Initiative NG2			
West	Initiative WH	11/30/2015		
North	Initiative NW1			9/30/2015
North	Initiative NW2		9/15/2015	
North	Initiative NX1	7/30/2015		
North	Initiative NZ1			12/31/2015
North	Production Sustainment			
North	Shipping Operations			
South	Production Sustainment			
South	Shipping Operations			
East	Production Sustainment			
East	Shipping Operations			
West	Production Sustainment			
West	Shipping Operations			

Now we sort those out to group together the handoffs that occur within the same initiative.

Strategic Initiative	Business Unit	BU Initiatives	Design	Production	Shipping
Initiative A	North	[Initiative NA]			3/31/2016
		Initiative NA1	8/31/2015		3/31/2016
		Initiative NA2		10/15/2015	1/31/2016
Initiative B	East	Initiative EB			7/31/2016
Initiative C	South	Initiative SC			11/30/2015
Initiative D	South	Initiative SD	9/30/2015		5/31/2016
Initiative D	East	Initiative ED			3/31/2017
Initiative E	North	Missing			
Initiative E	East	Initiative EE			10/31/2015
Initiative F	South	Initiative SF		11/15/2015	4/30/2016
Initiative G	North	[Initiative NG]			8/31/2016
		Initiative NG1			8/31/2015
		Initiative NG2			7/31/2016
Initiative H	West	Initiative WH	11/30/2015		6/30/2016
	North	Initiative NW1			9/30/2015
	North	Initiative NW2		9/15/2015	1/31/2016
	North	Initiative NX1	7/30/2015		2/28/2016
	North	Initiative NZ1			12/31/2015
	North	Production Sustainment - North			
	North	Shipping Operations - North			
	South	Production Sustainment - South			
	South	Shipping Operations - South			
	East	Production Sustainment - East			
	East	Shipping Operations - East			
	West	Production Sustainment - West			
	West	Shipping Operations - West			

Then we got agreement on the content of the various initiatives:

Strategic Goal	Strategic Initiative	Business Unit	BU Initiatives	Content
Goal I	Initiative A	North	[Initiative NA]	Lorem ipsum ...
			Initiative NA1	Lorem ipsum ...
			Initiative NA2	Lorem ipsum ...
Goal I	Initiative B	East	Initiative EB	Lorem ipsum ...
Goal II	Initiative C	South	Initiative SC	Lorem ipsum ...
Goal II	Initiative D	South	Initiative SD	Lorem ipsum ...
Goal II	Initiative D	East	Initiative ED	Lorem ipsum ...
Goal III	Initiative E	North	Missing	Lorem ipsum ...
Goal III	Initiative E	East	Initiative EE	Lorem ipsum ...
Goal III	Initiative F	South	Initiative SF	Lorem ipsum ...
Goal IV	Initiative G	North	[Initiative NG]	Lorem ipsum ...
			Initiative NG1	Lorem ipsum ...
			Initiative NG2	Lorem ipsum ...
Goal IV	Initiative H	West	Initiative WH	Lorem ipsum ...
		North	Initiative NW1	Lorem ipsum ...
		North	Initiative NW2	Lorem ipsum ...
		North	Initiative NX1	Lorem ipsum ...
		North	Initiative NZ1	Lorem ipsum ...
		North	Production Sustainment	Lorem ipsum ...
		North	Shipping Operations	Lorem ipsum ...
		South	Production Sustainment	Lorem ipsum ...
		South	Shipping Operations	Lorem ipsum ...
		East	Production Sustainment	Lorem ipsum ...
		East	Shipping Operations	Lorem ipsum ...
		West	Production Sustainment	Lorem ipsum ...
		West	Shipping Operations	Lorem ipsum ...

Now we can do the exercises!

Exercise 10: Building the Baselines

If you didn't do it earlier:

1. Develop and use a milestone chart
 - a. Use the committed end-dates to construct a launch milestone chart.
 - b. Obtain the sponsor's permission and publish the milestone chart
 - c. Hold a governance board meeting to discuss the milestone chart
2. Add the high-level scope descriptions and definitions of done to the list of initiatives. you now have a Work Breakdown Structure (WBS) Dictionary. Don't tell too many people about the name, it sounds scary. Just publish it.
3. Go back to the divisions. For each work package in progress, you have an estimated handoff date already. Now see if you can find out when they started on it. Before long you will be able to develop some general timeframes for each major step in the workflow and you can build out a very high-level schedule in your organization's preferred tool.
4. At the initiative level , add the important resources: that is, any large blocks of skill sets, and any unique skills. Include the operational activities.
 - a. Now, here's the exciting next step. The resources that are identified for all this work will almost certainly exceed the amount of people actually on hand, often by multiples of two or three. Hold a working meeting with the heads of the performing organizations. The intent is to negotiate the reduction of the resources stated to be needed for the current work to the actual resources available. Remember, all this work is actually (supposed to be) going on right now, so it cannot be "an impossible problem to solve". Either all the work is being done, or some parts of it are not. This is where the Zero-Sum Principle comes into play for you. Let the divisions battle it out among themselves as to who is doing what. The only rule is that the total resources currently being used cannot be greater than what is on hand.
 - b. In most organizations, the only way to solve the problem is to cut back on a number of initiatives that are on the books but not really being worked on. The PPFMO now takes the proposed changes to the various decision groups (assuming that there is more than one layer) and eventually to the governance board for review and approval. Or not.
5. Hold a meeting of the divisions to identify, at a high-level and working downwards only 1 or 2 levels, whether the performing division expects to complete its products as scheduled. If not, record the new expected date. More importantly, capture why timely delivery is not possible. Use the Issues Log to start an escalation process.